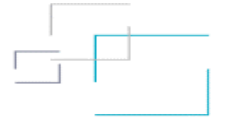


ShareSquared, Inc.

Transform the way you store, find, govern, and use enterprise content



Webinar: Presenters



Building Business Solutions with M365 and the Power Platform

Jim Duncan

Chief Architect
Microsoft Certified Master

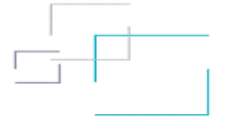


David Kruglov

Managing Director



Webinar: Context



Objective

To be a contribution and to teach you how Microsoft 365 and the Power Platform can be used to build line-of-business applications

Notes

- This is the first time we are using Microsoft Teams Webinars
- Feel free to ask questions at any time and we will either answer them in context or at the end of the session
- The recording will be provided in a subsequent email

Webinar: Context

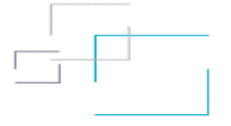


Use Case

A Public Records Request solution that includes:

- **SharePoint Online as the repository for documents/records**
- **Using Permissions, Location, Taxonomy and Sensitivity Labels to control which records are viewable on the public website**
- **A public-facing application that enables website visitors to search for “published” records and/or request “unpublished” records**
- An internal application used to track, route, and respond to records requests
- Using Microsoft Purview eDiscovery to compile responses
- Using Retention Labels and Policies to manage document/record lifecycles

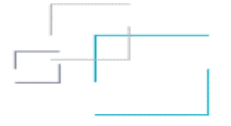
Webinar: Series Overview



Three-part webinar series Wednesdays 10-11am PT

- **May 15th:** *Configuring SharePoint for effective, secure document search*
- **May 29th:** Developing a Model-Driven App using the Microsoft Dataverse
- **June 12th:** Creating eDiscovery cases and Purview Retention Labels and Policies

This first session may seem rudimentary if you are an advanced SharePoint professional however, we strongly encourage you to join the subsequent sessions to see how all of the pieces fit together.



Closing: Questions and Next Steps

- Was this helpful / what you were looking for?
- Is there any other information you need?
- Feel free to email if I can be of services in any way



share²

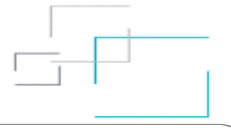
ShareSquared: Overview

Background

- Microsoft-centric products and services firm since 2005
- 13 Microsoft MVPs and 5 Microsoft Certified Masters in our history
- **Customers in US and Canada** include State and Local Gov't, Utilities, Transportation/Ports, Financial Services, Real Estate, Manufacturing, Healthcare, etc.

Differentiators

- Microsoft Certified Masters
- Solution Accelerators and Products
- Compliance-centric solutions
- Records Management Certified



ShareSquared: Example Local Government Customers

- **State of Washington, Department of Ecology** Power Platform-based Water Rights Permit Application Solution
- **County of San Mateo** M365 Modern Intranet, Taxonomy, and Compliance Solution and Content Migration
- **East Bay Municipal Utilities District** M365-based SOP Management solution
- **City of Salt Lake City** Modern Intranet Solution and M365 Migration
- **Port of Long Beach** M365 Support and .NET Development
- **City of Petaluma** M365 Modern Intranet, Collaboration Portal, Content Migration and Classification solution
- **Imperial County** M365 Support and Ongoing Implementation services
- **Centinela Youth Services** M365 Collaboration Portal solution and Migration from Dropbox
- **Kings River Conservation District** M365 Collaboration Portal solution, Migration and Classification of documents from File Shares to M365
- **Imperial Irrigation District** SharePoint 2016 to SharePoint 2019 Upgrade including KnowledgeLake, Custom Components, Integration, etc.,
- **San Francisco Public Utilities Commission** M365-based SOP Management solution
- **Preservation of Affordable Housing** M365 Intranet and Collaboration Portal solution
- **Ben Franklin Transit** SharePoint Design, Evaluation, Improvements and Ongoing Technical Support
- **Ventura County Fire Dept.** SharePoint Design and Branding
- **Colorado Housing and Finance Authority** M365 Intranet and Collaboration Portal solution, Direct Effect Award Process
- **Solid Waste Authority of Palm Beach County** M365 Modern Intranet and Content Migration
- **Northern Wyoming Community College District** SharePoint 2013 to M365 Migration and Modernization
- **Contra Costa Water District** M365 Migration, Workflow, Modernization and Records Management Solution
- **Fairfield Suisun Sewer District** Modern M365 Intranet and EDRMS Solution
- **Union Sanitary District** SharePoint 2013 to M365 Migration/Modernization and Workflow Solutions
- **City of Auburn** SharePoint 2013 to 2019 Upgrade, Workflow, Intranet and Agenda Management Solutions
- **Golden Valley Electrical Association** M365 EDRMS Solution with Gimmal and ongoing support
- **Lacombe County** Mentoring and Support
- **City of West Hollywood** Content Migration and Modern Intranet Solution
- **City of Antioch** Modern Intranet Solution
- **Port of San Diego** eDiscovery Solution
- **City of Vallejo** Modern Intranet Solution
- **San Diego County Water** EDRMS Solution with content auto-classification using Netwrix Classifier
- **City of Olympia, WA** Modern Intranet and Digital Workspace Solution
- **Port of Seattle, WA** Modern Intranet and Project Management Portal Solution
- **Alameda County Water District** EDRMS solution
- **WaterOne** EDRMS Solution with RecordPoint
- **City of Belmont** Intranet, Project Management and Workflow Solution, and ongoing support
- **County of Los Angeles Registrar Recorder/County Clerk** Modern Intranet Solution
- **County of Los Angeles Dept. of Human Resources** Modern Intranet

ShareSquared: Areas of Expertise



Centralize and Manage Content

Portals and Collaboration

- Intranets
- Extranets
- Collaboration Portals
- Content Mgmt. and Publishing

Document Management

- Controlled Processes
- Templates
- Migrations
- Classification
- Metadata Driven Search

Compliance and Automation

ECM and Records Management

- Support legal and regulatory requirements
- Automate retention and disposition
- Legacy ECM/ERM Migrations
- Document Imaging

Process Automation

- Electronic forms and workflows
- Replace manual processes and one-off productivity applications
- Save time and reduce errors

Integration, Analytics, and Public Portals

Integration and BI

- Connect to back-office systems (e.g. HRIS, ERP)
- Bidirectional updates
- Data Visualization
- Dashboards
- Process Improvement

Public Portals and Dynamics 365

- Public-facing partner, customer, etc. portals and websites
- Custom Applications
- Dynamics 365 Implementation and Customization

ShareSquared: Microsoft Certifications & Programs



Microsoft Partner Network 2024-2025 Program Year

- **Modern Work Enterprise Solutions Partner**
- **Microsoft Content Services Partner Program**
- **Microsoft Purview Partner Program (*new*)**
- **Microsoft Graph API Incubation Program (*new*)**
- **Microsoft Adoption and Change Management Advanced Specialization**
- Gold Competency in Cloud Productivity
- Gold Competency in Cloud Platform
- Gold Competency in Collaboration and Content
- Gold Competency in Datacenter
- Silver Competency in Small and Midmarket Cloud Solutions
- Silver Competency in Messaging
- Silver Competency in Enterprise Mobility Management
- Microsoft Cloud Accelerate Partner
- Microsoft Office365 FastTrack Partner
- Member of the Microsoft Technology Adoption Program (TAP)
- Member of the Microsoft Partner Research Panel (MSPRP)



ShareSquared: Reseller / Implementation Partners



ShareSquared: Solution Accelerators



Taxonomy Package

- Prebuilt Content Types
- IA Workbook
- Deployment Utility

Portal Deployment Package

- Portal Creation Workbook
- Deployment Utility
- Deploy Modern Sites, Branding, Taxonomy, Add-ons, etc.

Compliance Package

- Compliance Workbook
- Deployment Utility

Name	Description	Visibility	Classified	Managed Pa	URL
Sales	Sales communication site				prd-sa
Retail	Retail team site	Private		Teams	prd-saret
Wholesale	Wholesale team site	Private		Teams	prd-saws
Correspondent	Correspondent team site	Private		Teams	prd-sacorr
Multifamily	Multifamily team site	Private		Teams	prd-samf
Operations	Operations communication site				prd-ops
Loan Setup	Loan Setup team site	Private		Teams	prd-opsam
Account Manager	Account Manager team site	Private		Teams	prd-opsam
Underwriting	Underwriting team site	Private		Teams	prd-opsuw
Post Closing	Post Closing team site	Private		Teams	prd-opsuc
Valuations	Valuations team site	Private		Teams	prd-opsval
Closing	Closing team site	Private		Teams	prd-opscl
Transaction Coordinator	Transaction Coordinator team site	Private		Teams	prd-opsct
Business Support	Business Support communication site				prd-bs
Accounting	Accounting team site	Private		Teams	prd-csacct
Asset Management	Asset Management team site	Private		Teams	prd-csam
Business Strategy	Business Strategy team site	Private		Teams	prd-csbs
Capital Markets	Capital Markets team site	Private		Teams	prd-cscm
Creative Development	Creative Development communication site				prd-csdc
Information Technology	Information Technology team site	Private		Teams	prd-csit
Legal	Legal team site	Private		Teams	prd-cslgl
Senior Leadership	Senior Leadership team site	Private		Teams	prd-csmgt
Marketing	Marketing communication site				prd-csmkt
Branding	Branding team site	Private		Teams	prd-csmktbrand
Customer Experience	Customer Experience team site	Private		Teams	prd-csmktce
Branch Integration	Branch Integration team site	Private		Teams	prd-csmktbi
People & Culture	People & Culture communication site				prd-cspc
Learning & Development	Learning & Development team site	Private		Teams	prd-cspcd
Internal Communications	Internal Communications team site	Private		Teams	prd-cspcic
Employee Experience	Employee Experience team site	Private		Teams	prd-cspcee
HR Operations	HR Operations team site	Private		Teams	prd-cspchr
Talent Acquisition	Talent Acquisition team site	Private		Teams	prd-cspcta
Managers	Managers team site	Private		Teams	prd-cspcmgt
Enterprise Risk Management	Enterprise Risk Management communication site				prd-cserm
Compliance	Compliance team site	Private		Teams	prd-csermcomp
Counterparty Credit Risk Management	Counterparty Credit Risk Management team site	Private		Teams	prd-csermcrmc
Quality Control	Quality Control team site	Private		Teams	prd-csermqc
Vendor Management	Vendor Management team site	Private		Teams	prd-csermvm
Policies & Procedures	Policies & Procedures communication site				prd-pp
Submissions	Centralized site for working on Submission Packages	Private		Teams	prd-submissions

Deploy

Platform: * SharePoint Online

Site URL: * https://sharesquared.sharepoint.com/sites/tedstest6

User Name: * tiverson@sharesquared.com

Password: * [masked]

Rename (GO2): [input]

Site Columns

Content Types

Site Column Mappings

Libraries

Content Type Mappings

OK Cancel

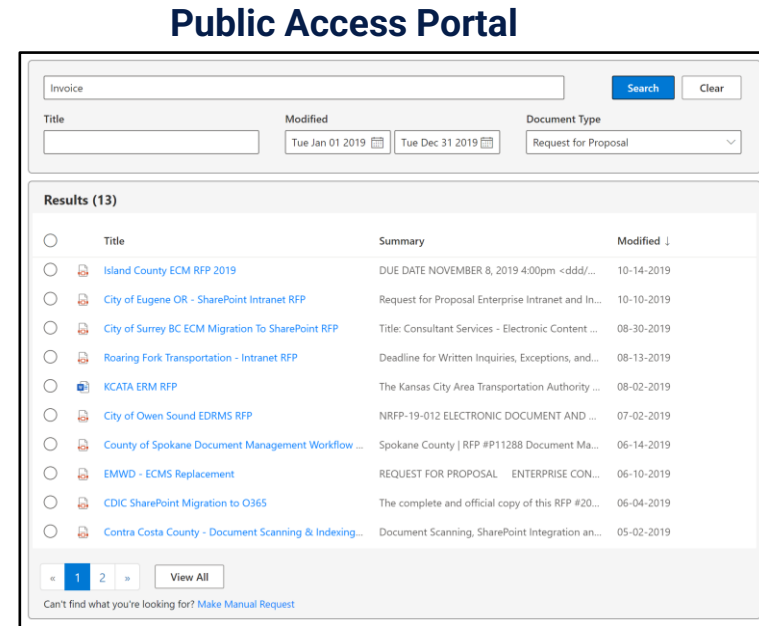
ShareSquared: Products

User Adoption Package

- [Taxonomy Tiles](#)
- [Advanced Search](#)
- [Folksonomy Capture](#)

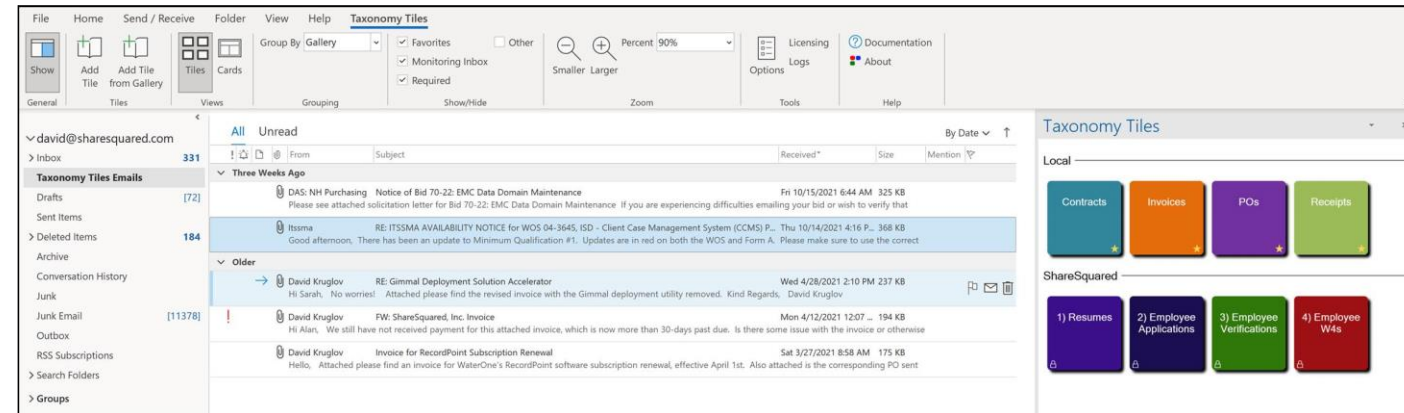
Public Access Portal

- Provides public access to documents in M365
- Template-Driven search interface
- Standard Forms, PRR, Permits, etc.



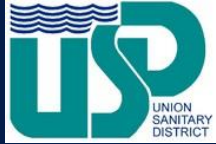
Taxonomy Tiles for Outlook

- Inbox Monitoring
- Tile Gallery
- Document Scanning and Conversion
- Windows Version



Multilingual for Microsoft 365

- Pre-translated Webpart, Page, and List content



Transform the way you store, find, govern, and use enterprise content

Challenges

Understanding Existing Content

USD's content spanned several repositories including SharePoint 2010, Alchemy Gold, and File Shares. Migrating these disparate repositories to Microsoft 365 required careful analysis of the content to identify Redundant, Obsolete, and Trivial (ROT) content, and to determine the appropriate target sites/libraries.

Complex Taxonomy

Each content source repository had different taxonomic structures and metadata. The challenge was to homogenize these disparate taxonomies in Microsoft 365 using a common taxonomy. All existing metadata was preserved in the migration and will be enhanced in the future using SharePoint Syntex.

Modernization

The SharePoint 2010 implementation was based on Classic site structures, various third-party web parts, and SharePoint 2010 and K2 workflows. To address this, Modern site structures were deployed, and all legacy web parts and workflows were reimplemented using M365 built-in features and Power Automate.

Content Lifecycle/Records Management

Documents in legacy repositories were unmanaged leading to issues with search, increasing storage requirements, and making it impossible to manage the lifecycle of documents in a consistent manner. Once in Microsoft 365, documents can be identified against USD's Retention Schedule and managed using ADG and policies.

Project and Change Management

The 100% remotely-delivered project was managed using an M365-based project portal to house all project artifacts including the Project Online project plan and recorded Microsoft Teams meetings. As users were new to M365, virtual training and knowledge transfer were provided via Microsoft Teams.

Case Study Summary

Union Sanitary District (USD) operates a 33-acre wastewater treatment facility in Union City and provides collection, treatment and disposal services to a total population of over 356,000 in Fremont, Newark and Union City, California. The District maintains over 830 miles of underground pipeline in its service area.

With documents in several on-premises repositories including an aging SharePoint 2010 environment, Alchemy Gold, and File Shares, USD engaged ShareSquared to migrate all of its content to Microsoft 365. The Modern Team Sites, Communication Sites, and Hub sites, Branding, Taxonomy, Web parts and Add-ons were deployed using ShareSquared's Portal Deployment Utility. The migration included the modernization of USD's Taxonomy to support Records Management, Classification of the content, and the redevelopment of several K2 workflows using Power Automate.

"Consolidating our content on the Microsoft 365 platform and modernizing both the user experience and our workflow processes will be a tremendous asset to the District, especially as we now support a mostly remote workforce."

Todd Jacob

IT Administrator, Union Sanitary District

Results and Outcomes

- Efficiency and productivity enhanced by automating processes using Power Automate
- Content resides solely in M365 vs. in siloed repositories
- Legacy content repositories can be decommissioned
- Content findability greatly improved with the implementation of an enterprise taxonomy and content classification
- Internal team collaboration and sharing has significantly increased
- Remote workers have 24/7 access to the M365 solution
- M365's adaptive and responsive design yielded a solution that is mobile friendly
- Content is managed against the records retention schedule and deleted when no longer needed
- Records are destroyed in accordance with legal, regulatory, and organizational policies

Enhanced Treatment & Site Upgrade Program (ETSU)

Strategy and Solution Components

Foundation

Discovery and Analysis

- Inventory and analyze content sources
- Identify ROT
- 3rd-Party Component Analysis

Design

- Architecture design and planning
- Develop governance policy
- Portal structure and taxonomy design

Deployment

- Modern site structures
- Enterprise taxonomy
- Microsoft Teams

Content

Content Migration

- SharePoint 2010
- Alchemy Gold
- File Shares

Feature Implementation

- Implement People Directory
- Automate business processes
- Content Classification

Adoption

Change Management

- Context Sensitive Training System
- Envisioning sessions
- Admin, Power and End User Training



Transform the way you store, find, govern, and use enterprise content

www.ShareSquared.com

800.445.1279

ShareSquared specializes in O365-based Content Services solutions including Intranet/Extranet Portals, Enterprise Content and Records Management, file-share and legacy ECM content migrations, and process automation/workflow. Our expertise includes planning, design, governance, taxonomy, branding, workflow, integration, BI, and custom development.

Union Sanitary Project Visuals

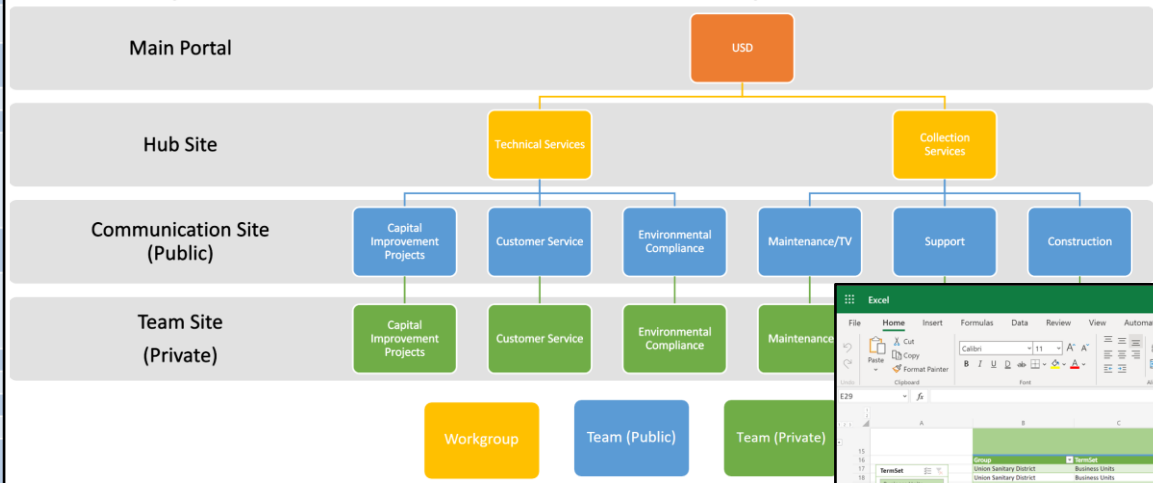


Records Retention Schedule

	A	B	C	D	E	F
	Document Series Title	Responsible Group	Retention (in years)	Retention Qualifier	Destruction or Other Action	Comments
3	Accounts Payable [7]	BS/FIST	7		D	
4	Agendas, Board Meetings [Never]	GM	99		SE or M	Microfilm or Store Electronically on unalterable media
5	Annexations [Never]	TSCS/CST	99		SE or M	Microfilm or Store Electronically on unalterable media
6	Banking Files [7]	BS/FIST	7			
7	Board Meeting - Agenda Packet [Never]	GM	99			
8	Bonds [10]	BS/FIST	10			
9	Budget and CIP (Annual) [10]	BS/FIST	10			
10	Canceled Checks [7]	BS/FIST	7			
11	Cash Receipts [7]	BS/FIST	7			
12	CEQA Documents (EIRs, etc) [varies]	TSCS/CP	10			
13	Claims [5]	GM	5			
14	Collection Line Cleaning - Field Reports [13]	CS	13			
15	Committee and Task Force Meeting Notes [3]	ALL WGs	3			
16	Computer Network Data Backup [2]	BS/IT	2			
17	Confined Space Entry Permits [3]	CS/FMC	3			
18	Conflict of Interest Statements [7]	GM	7			
19	Construction Project Files, Capital Improvement Projects - Project Administration, Schedules, Certified Payrolls*, Correspondence, Diaries, Bid & Proposal docs, Insurance Certificates, etc. [10]	TSCS/CP	10	completes	SRF agmt	payroll for 20-30 years (depending on SRF agmt) after project completion

Project Tasks in Planner Synced with Project Online

Conceptual Architecture- Complex

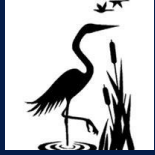


Group	Business Units	Technical Services	Collection Services	Enhanced Treatment
Union Sanitary District	Business Units	No	Yes	Yes
Union Sanitary District	Business Units	No	Yes	Yes
Union Sanitary District	Business Units	No	Yes	Yes
Union Sanitary District	Business Units	No	Yes	Yes

Days Without An Injury														
District: 36 Days							District Record: 450 Days							
CIP	CST	EC	FAST	FIST	IT	MMT	OST	TPO	R&S	MECH	Elec	MTV	Const	Support
3393	1126	4710	1190	8492	5724	5454	5728	4121	1455	39	36	62	952	1700

Business Dashboard

M365 Portal Creation Workbook



Transform the way you store, find, govern, and use enterprise content

Challenges

Understanding Existing Content

FSSD's content spanned several repositories including SharePoint 2010 and File Shares. Migrating these repositories to Microsoft 365 required careful analysis of the content to identify Redundant, Obsolete, and Trivial (ROT) content, and to determine the appropriate target sites/libraries.

Taxonomy

The content repositories had little to no taxonomic structures or metadata. The challenge was to design and deploy an enterprise taxonomy in Microsoft 365 to meet FSSD's search and records management requirements. Content classification using SharePoint Syntex will further enhance these capabilities.

Migration

Documents in legacy repositories were unmanaged leading to issues with search, increasing storage requirements, and making it impossible to manage the lifecycle of documents in a consistent manner. Once in Microsoft 365, documents can be identified against FSSD's Retention Schedule and managed using ADG and policies.

Content Lifecycle/Records Management

The SharePoint 2010 implementation was devoid any real content governance. The new enterprise taxonomy and retention policies were implemented to align with FSSD's Retention Schedule. Additionally, role-based OneDrive and Exchange retention policies were configured to align with NARA's Capstone approach.

Project and Change Management

The 100% remotely-delivered project was managed using an M365-based project portal to house all project artifacts including the Project Online project plan and recorded Microsoft Teams meetings. As users were new to M365, virtual training and knowledge transfer were provided via Microsoft Teams.

Case Study Summary

Fairfield-Suisun Sewer District (FSSD) serves more than 135,000 residential, commercial and industrial customers in central Solano County, about 40 miles northeast of San Francisco. It owns and operates a system of sanitary sewers and pumping stations; and oversee wastewater collection and treatment, water recycling and stormwater management services.

With documents in on-premises repositories including a past-end-of-life SharePoint 2010 environment and File Shares, FSSD engaged ShareSquared to migrate its content to Microsoft 365 and implement a comprehensive records management solution. ShareSquared's taxonomy package, with over 70 prebuilt Content Types, was used to jump-start the design and deployment of an enterprise taxonomy. The modern site structures, Branding, Taxonomy, Web parts and Add-ons were deployed using ShareSquared's Portal Deployment Utility. The migration included the implementation of an enterprise taxonomy, a comprehensive records management solution, and content classification.

"Implementing a holistic records management solution on Microsoft 365 helped us to comply with regulatory requirements and mitigate risk, as well as to enhance internal collaboration and productivity."

Meg Herston

Director of Environmental Services



Results and Outcomes

- Content resides solely in M365 vs. in unmanaged, siloed repositories
- Content is managed against the records retention schedule and deleted when no longer needed
- Records are destroyed in accordance with legal, regulatory, and organizational policies
- Legacy content repositories including SharePoint 2010 can be decommissioned
- Content findability greatly improved with the implementation of an enterprise taxonomy and content classification
- Internal team collaboration and sharing has significantly increased
- Remote workers have 24/7 access to the M365 solution
- M365's adaptive and responsive design yielded a solution that is mobile friendly

Strategy and Solution Components

Foundation



Discovery and Analysis

- Inventory and analyze content sources
- Identify ROT
- Document regulatory requirements



Design

- Architecture design and planning
- Develop governance policy
- Taxonomy and retention policies



Deployment

- Modern site structures
- Taxonomy and retention policies
- Microsoft Teams

Content



Content Migration

- SharePoint 2010
- File Shares



Feature Implementation

- Board Agenda Solution
- Custom branding and web parts
- Content Classification

Adoption



Change Management

- Envisioning sessions
- Context Sensitive Training System
- Knowledge transfer and training



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