

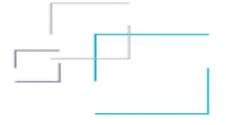
# ShareSquared, Inc.

*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

- 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- ***A public-facing application that enables website visitors to search for “published” records and/or request “unpublished” records***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: Overview



## Three-part webinar series Wednesdays 10-11am PT

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

## Session 1 Review

- Refine SharePoint Search Using Permissions, Location, Taxonomy, and Microsoft Purview Sensitivity Labels
- [Taxonomy Solution Accelerator](#)
  - ~70 prebuilt Content Types
  - Information Architecture Workbook
  - Taxonomy Deployment Utility
- [Public Access Portal Product](#) for Self-Serve PRRs



# Webinar: Overview

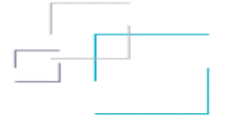


## Today's Focus:

- Public Access Portal for PRRs not found on the Self-Serve Portal
- Quick tour of Dynamics 365 Case Management
- Deep Dive into a Custom Model-Driven Dataverse App:
  - Dataverse Tables, Forms, and Views
  - Model-Driven Apps
  - Business Process Flow Designer, Dashboards, etc.
  - Adding Activities to the Timeline and an Email Template
- This platform:
  - Is hosted by Microsoft, cloud-first, scalable, and fault-tolerant
  - Can be used for most any data-centric application
  - Can replace Microsoft Access, Excel, and Client-Server applications
  - Is innately integrated with SharePoint, Power Automate, Dynamics, Excel, etc.



# 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





share<sup>2</sup>



# ShareSquared: CV3 Financial Property Underwriting Solution

## Model-Driven App



←

📄

📁

💾 Save

💾 Save & Close

➕ New

🚫 Deactivate

🗑 Delete

🔄 Refresh

🔍 Check Access

🔄 Process

👤 Assign

🔄 Flow

📄 Word Templates

📊 Run Report

🔗 Share

123456 - Saved

Loan

JK Jordan Kruglov

Owner

Loan Process

Active for 6 days

Loan Origination

Loan Processing

Underwriting (4 D)

Funding

Accounting

General

Properties

Assets

HUD-1 Section J

HUD-1 Section L

Funding

Loan Detail

Number \*123456

ProgramRental Portfolio

TypePurchase

Term30

Qualifying Rate0.05

Acquisition Cost\$1,000,000.00

Total Loan Amount\$1,450,000.00

Secondary Financing\$0.00

Borrower

First NameJohn

Last NameSmith

Full Name👤John Smith

ExperienceExperience (3+ Properties)

FICO800

Renovation LevelLevel 2

VestingIndividual

Occupancy StatusVacant

Chat

🔍 Search timeline

📝 Enter a note...

Recent

JK

Modified on: 1:38 PM

📄 Note modified by 👤 Jordan Kruglov

Attached Information

Attached is a blank txt file showing that attachments are available.

📎 BLANK.txt

View more

JK

Modified on: 1:36 PM

📄 Note modified by 👤 Jordan Kruglov

Loan looks good!

View more

JK

Modified on: 1:31 PM

📄 Note modified by 👤 Jordan Kruglov

More Information

Need to ask Borrower John smith about more information on his ...



# ShareSquared: CV3 Financial Property Underwriting Solution

## Public-Facing Power Pages App



CV3 Financial Services

Home | [Admin] Articles | [Admin] Topics | Contact Us

Topics > Underwriting Guidelines

Underwriting Guidelines

Underwriting Procedures

Rental Matrix

Rental and Rental Portfolio Product Matrix

Eligible Loan Purpose

Rental Overview

Business Purpose

Prepayment Premium

Impounds

Underwriting Guidelines

CV3 Financial Services ("CV3") Underwriting Procedures.

Underwriting Procedures

Table of Contents

[Overview](#)

[Business Purpose](#)

[Loan Programs](#)

[Prepayment Premium](#)

[Bridge with Renovation / Bridge & Bridge Portfolio Prepayment Premium](#)

[Rental & Rental Portfolio Prepayment Premium](#)

[Loan Purpose](#)

[Assumable](#)

[Cross-Default](#)

[Impounds](#)

[Lending Area](#)

[Loan Limits](#)

[Cross-Collateralized Loans](#)

[Subordinate Financing](#)

[Ineligible Subordinate Financing](#)

[Seasoning Requirements](#)

[Properties Listed for Sale](#)

[Non-Arm's Length Transactions](#)

[Property Wholesaler Transactions](#)



# ShareSquared: CV3 Financial Property Underwriting Solution

Editing Underwriting Guideline with Power Pages



CV3 Financial Services

Home | [Admin] Articles | [Admin] Topics | Contact Us

Articles

Q Search Articles

Create an article

Article Title	Topic	Published Status	Modified On		
Rental Overview	Rental and Rental Portfolio Product Matrix	Published	1/23/2024	<div></div>	<div>Take Action </div> <div>Edit Details</div> <div>Preview</div>
Business Purpose	Rental and Rental Portfolio Product Matrix	Published	1/23/2024	<div></div>	<div>Take Action </div>
Loan Terms	Rental and Rental Portfolio Product Matrix	Draft	1/23/2024	<div></div>	<div>Take Action </div>



# ShareSquared: CV3 Financial Property Underwriting Solution

## Microsoft Copilot Chatbot



### Underwriting Guidelines

- Underwriting Procedures
- Rental Matrix

---

### Rental and Rental Portfolio Product Matrix

- Eligible Loan Purpose
- Rental Overview
- Business Purpose
- Prepayment Premium
- Impounds
- Number of Properties
- Portfolio Eligibility
- Lending Area
- Loan Amount Types

standard underwriting guidelines

CV3 requires lava insurance for the island of Hawaii only based on Hawaiian lava flow maps and other information which is available online at the U.S. Geological Survey Hawaiian Volcano Observatory [website](#)

#### Flood Insurance

Flood insurance should be in the form of a standard policy issued under the National Flood Insurance Program (NFIP). A separate policy is required for each subject property residential and/or commercial within a Special Flood Hazard Area (SFHA), identified as "A" or "V" as reflected on the Flood Maps (FIRM). Federal law mandates Flood Insurance; it cannot be waived under any circumstances. Flood insurance is required for subject properties located in SFHAs when CV3 requires or Borrower/sponsor pays taxes and insurance. CV3 requires that flood insurance policies provide at least 12 months of coverage on purchase and annual premium paid prior to closing. For refinance transactions CV3 requires that the flood policy have 45 days remaining on the policy at closing. A Flood insurance declarations page is acceptable as evidence of proper insurance coverage. The application and paid receipt are required for new flood policies prior to closing. Flood policy declarations page, post-closing.

#### Amount of Flood Insurance Coverage – 1 to 4 Unit Family Dwellings

The minimum amount of flood insurance required by federal law for 1-4 unit family dwellings, including multi-family dwellings, is the lesser of the maximum amount of flood insurance coverage available for one- to four-unit family dwellings through the National Flood Insurance Program (NFIP) currently \$250,000, or

- The insurable replacement cost value of the building, or
- Outstanding principal balance of the loan, plus the unpaid principal balance of a

#### Amount of Flood Insurance Coverage - PUD and Condominium Properties

The requirements for PUD and condominium flood insurance coverage is listed below:

- PUD
  - Flood insurance requirements for an individual PUD unit is the same as for one- to four-unit family dwellings. If a master policy is maintained, it must cover all element buildings and any other common property located in the SFHA
- Condominium
  - The homeowners' association must maintain a Residential Condominium Building Association Policy (RCBAP) or equivalent private flood insurance coverage for a condo building

#### CV3 Wiki (DEV) bot

Hi Jim Duncan, I'm CV3 Wiki (DEV) bot! How can I help you today?

26 minutes ago

What is the flood insurance required for multi-family properties?

Just now

The minimum amount of flood insurance required by federal law for 1-4 unit family dwellings, including multi-family properties, is the lesser of the maximum amount of flood insurance coverage available for one- to four-unit family dwellings through the National Flood Insurance Program (NFIP) (currently \$250,000) or the insurable replacement cost value of the building [1]. Additionally, for PUD (Planned Unit Development) and condominium properties, the homeowners' association must maintain a Residential Condominium Building Association Policy (RCBAP) or equivalent private flood insurance coverage.

Type your message

Bot responses are AI-generated so inaccuracies are possible.



# ShareSquared: PACBLU Workers Comp Case Management

## Case List View



Home

Recent

Pinned

Case Management

Cases

Resources

Activity Management

Expense Entries

Time Entries

Data Management

People

Organizations

ICD Codes

Activity Types

Show Chart

New

Delete

Refresh

Visualize this view

Email a Link

Flow

Run Report

Excel Templates

Share

Active Cases

Edit columns

Edit filters

Filter by keyword

	File Number	Claimant	Claim Number	Referring Office	Referral Purpose	Date Of Injury	Employer	Created On
<input type="checkbox"/>	MT00001000	Critter Prah		MT				10/25/2023 4:08 PM
<input type="checkbox"/>	MT00001025	Critter Prah	55863	MT		9/13/2023	Employer Supr...	9/14/2023 1:14 PM
<input type="checkbox"/>	MT00001024	Joe Homebody	230948	MT	132490007	9/10/2023	Figure Eight C...	9/14/2023 9:28 AM
<input type="checkbox"/>	HI00001023	Peter Jones	2023545454CC	HI	Task - MED	9/4/2023	Island Insuran...	9/13/2023 6:32 PM
<input type="checkbox"/>	ID00001022	Jennifer Morton	WX5142548512	HI	Full Field - MED	8/26/2023	Island Insuran...	9/13/2023 3:27 PM
<input type="checkbox"/>	HI00001021	Claimant Numb...		HI		9/7/2023	Christmas Tree...	9/7/2023 1:17 PM
<input type="checkbox"/>	CA00001020	Very Injured	111111	CA		9/7/2023	7-Eleven Hawaii	9/7/2023 11:52 AM
<input type="checkbox"/>	MT00001019	Very Injured		MT				9/7/2023 8:13 AM
<input type="checkbox"/>	HI00001018	Very Injured		HI			Rocky Mounta...	9/7/2023 7:56 AM
<input type="checkbox"/>	AK00001017	Joe Homebody		AK			Figure Eight C...	9/7/2023 7:47 AM
<input type="checkbox"/>	CA00001016	Steven Clark	1234567	CA		9/13/2023	7-Eleven Hawaii	9/1/2023 4:07 PM
<input type="checkbox"/>	HI00001015	//Sam //Henry	20029393dkk	HI	Task - Job	8/31/2023	FoodLand	9/1/2023 2:39 PM
<input type="checkbox"/>	MT00001014	Frank Wong	120398098	MT	Task - MED	8/28/2023		9/1/2023 2:38 PM

Rows: 26



# ShareSquared: PACBLU Workers Comp Case Management

## Individual Case with Activity Timeline



Home

Recent

Pinned

Case Management

- Cases
- Resources

Activity Management

- Expense Entries
- Time Entries

Data Management

- People
- Organizations
- ICD Codes
- Activity Types

WA00001001 - Saved

Case · Specialist

Joe Homebody  
Claimant

WA00001001  
File Number

Preston Jones  
Specialist

dataBLU Case Managem...  
Active for 40 days

Open

Case Details

Assign

Reporting (40 D)

Invoicing

Close

General

Contacts

Time & Expenses

Related

File Type \*  
WA

File Number  
WA00001001

Date Assigned  
10/2/2023

Catastrophic  
No

Claimant \*  
Joe Homebody

Case Data

Claim Number  
333224

Policy Number  
5432198

DCD ID  
---

ICD Code  
D31.61

Date Of Injury  
9/19/2023

ICD Description  
Benign neoplasm of unspecified site of rig...

Referral Purpose  
Onsite FCM

Referring Office  
WA

Jurisdiction  
WA

Activities

Search timeline

Enter a note...

Recent

GK

\$PRP

Date: 10/23/2023

Amount: \$100.00

Active

JD

Note modified by Jim Duncan

This is a note with a typographical error.

10/17/2023 1:19 PM

DW

Travel

Date: 10/16/2023

Hours: 1.0

Active

GK

Wait

Date: 10/16/2023

Hours: 0.4

Active

JD

Job Analysis

Date: 10/13/2023

14

share<sup>2</sup>



# ShareSquared: CHFA Grants Management Solution

## Annual Grant Summary



Recent

Pinned

My Work

Sales accelerator

Tasks

Activities

Dashboards

Events

Partners

Organizations

Contacts

Regions

Referrals

Marketing

Marketing Lists

Quick Campaigns

Campaigns

Literature

Investment

Budgets

Awards

CRM

Save Save & Close New Deactivate Delete Refresh Check Access Assign Flow Word Templates Run Report Share

Business Development Sponsorship (2019) - Saved

Business Development Sponsorship (2019) \$150,000.00

Budget Budget Name Budget Total Amount

General Related

Budget Name \* Business Development Sponsorship (2019)

Budget Year \* 2019

Budget Total Amount \$150,000.00

Total Amount Committed \$146,080.00

Last updated: 9/28/2023 8:16 PM

Total Amount Funded \$146,080.00

Last updated: 9/28/2023 8:16 PM

Timeline

Search timeline

Get started

Capture and manage all records in your timeline.

Awards

New Award Add Existing Award Refresh

Quick find

Award N...	Award Name	Organization Name	Investment Committe...	Investment Funded	Remaining Amount	Award Status
Award-5695	Heroes Luncheon	A Precious Child	\$2,500.00	\$2,500.00	\$0.00	Approved
Award-5696	The Golden Tortilla	Arc of Pueblo, The	\$280.00	\$280.00	\$0.00	Approved
Award-5697	50th Luncheon Event	Bayaud Enterprises	\$2,500.00	\$2,500.00	\$0.00	Approved
Award-5698	Local Social	Brothers Redevelopment Inc. (BRI)	\$3,000.00	\$3,000.00	\$0.00	Approved
Award-5699	75th Anniversary: It's A Wonderf...	Catholic Charities Diocese of Pueblo	\$1,000.00	\$1,000.00	\$0.00	Approved



# ShareSquared: OIR Group Use of Force Oversight Tracking Solution

## Law Enforcement Use of Force Review and Project Tracking Solution

←

↗

Save

Save & Close

+ New

Deactivate

Delete

Refresh

Check Access

Process

Assign

Flow

Word Templates

Run Report

Share

126841 - Saved

Project

Project Process

Active for less than one minute

Initialize A Project (< 1 Min)

Initialize A Review

General

Review

Related

General

Case ID \*

126841

Account

Las Cruces

Type

Internal Investigation

Response

No

Case Status

Pending Assignment

Dates

Incident Date

10/11/2023

Internal Affairs Date

10/12/2023

Receipt Date

10/27/2023

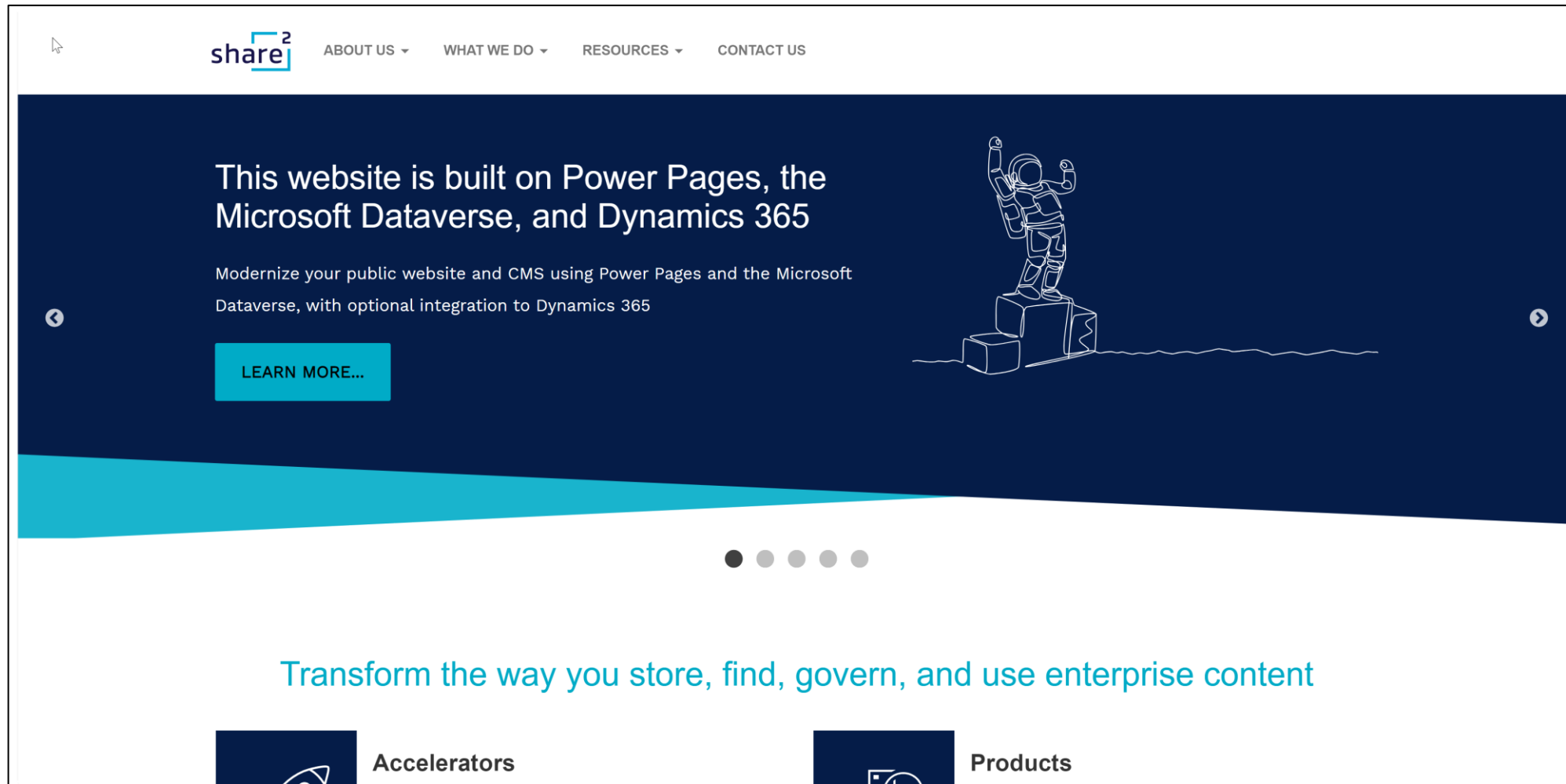
Due Date

12/21/2023



# ShareSquared: ShareSquared Power Platform-based Website

## Public-Facing Power Pages Website





# ShareSquared: ShareSquared Power Platform-based Website

## Products Dataverse Table



Dynamics 365 | S² Website Content

Search

Try the new look

Show Chart | New | Delete | Refresh | Visualize this view | Email a Link | Flow | Run Report | Excel Templates | Export to Excel | Share

Active Products

Edit columns | Edit filters | Filter by keyword

Name	Product Family	Product (Dynamics)	Display Order	Video URL
Taxonomy Package	Accelerators	Taxonomy Package	10	<a href="https://s2cdn.azureedge.net/products/Taxonomy-Package/Overview...">https://s2cdn.azureedge.net/products/Taxonomy-Package/Overview...</a>
Portal Deployment Package	Accelerators	Portal Deployment Package	20	<a href="https://s2cdn.azureedge.net/products/Portal-Deployment-Package/...">https://s2cdn.azureedge.net/products/Portal-Deployment-Package/...</a>
Compliance Package	Accelerators	Compliance Package	30	
Branding Extension for M365	Accelerators	Branding Extension for M365	50	
Taxonomy Tiles	Products	User Adoption Package	10	<a href="https://s2cdn.azureedge.net/products/Taxonomy-Tiles/Overview.mp4">https://s2cdn.azureedge.net/products/Taxonomy-Tiles/Overview.mp4</a>
Taxonomy Tiles for Outlook	Products	Taxonomy Tiles for Outlook	15	<a href="https://s2cdn.azureedge.net/products/Taxonomy-Tiles-for-Outlook/...">https://s2cdn.azureedge.net/products/Taxonomy-Tiles-for-Outlook/...</a>
Taxonomy Tiles for Windows	Products	Taxonomy Tiles for Windows	20	
Public Access Portal	Products	Public Access Portal	25	<a href="https://s2cdn.azureedge.net/products/Public-Access-Portal/Overvie...">https://s2cdn.azureedge.net/products/Public-Access-Portal/Overvie...</a>
Folksonomy Capture	Products	User Adoption Package	30	
Advanced Search	Products	User Adoption Package	40	<a href="https://s2cdn.azureedge.net/products/Advanced-Search/Overview....">https://s2cdn.azureedge.net/products/Advanced-Search/Overview....</a>
Content Management System	Products	Content Management System	45	<a href="https://s2cdn.azureedge.net/products/Content-Management-Syste...">https://s2cdn.azureedge.net/products/Content-Management-Syste...</a>
Multilingual for M365	Products	Multilingual for M365	50	<a href="https://s2cdn.azureedge.net/products/Multilingual-for-M365/Overvi...">https://s2cdn.azureedge.net/products/Multilingual-for-M365/Overvi...</a>
Managed Services	Services	Managed Services	5	
Support Services	Services	Support Services	10	
Microsoft 365 Mentoring	Services	Microsoft 365 Mentoring	15	
Microsoft 365 GamePLAN	Services	Microsoft 365 GamePLAN	20	
Power Apps + Dataverse Solutions	Solutions		5	

1 - 24 of 24

Page 1



# ShareSquared: ShareSquared Power Platform-based Website

## Products Model-Driven Form



**Dynamics 365** | S2 Website Content

Search

Try the new look

Save Save & Close New Deactivate Delete Refresh Check Access Assign Flow Word Templates Run Report Share

### Taxonomy Package - Saved

S2 Product · Information

General Overview Pricing Gallery Details Related

#### Main

Name	Taxonomy Package	Product Family	Accelerators
Subtitle	---	Product (Dynamics)	Taxonomy Package
Display Order	10		

#### Product Description

Short Description: improve search, workflow, and records management with customized, pre-built, Content Types

Long Description: Designer HTML

Jumpstart your SharePoint and Microsoft 365 Search, Document and Records Management, and Workflow solutions with our Taxonomy Package, which includes approximately seventy prebuilt Content Types, an Information Architecture (IA) Workbook used to customize and enhance the prebuilt taxonomy, and a utility to programmatically deploy the taxonomy to your environment.

The prebuilt taxonomy is elegantly designed to leverage Content Type inheritance, and supports documents that all organizations use, such as Invoices, Contracts, Policies and Procedures, Correspondence, etc. The package also includes an Excel-based workbook, which we help you complete based on your Search and Document/Records Management requirements. The workbook maps the taxonomy to structures in M365/SharePoint such as Sites, Site Columns, Content Types, Term Sets, etc.

The deployment utility uses the workbook as an input, and provides a repeatable and error-free process that can be used to deploy to a Test environment, for iterative deployments and enhancements throughout a project, and for the final deployment to Production. Using this utility ensures that the taxonomy is deployed exactly as defined in the requirements and in accordance with best practices.

Font Size B I U A [Rich Text Editor Icons]



# ShareSquared: ShareSquared Power Platform-based Website

## Products Listing Using Liquid



The screenshot displays the Dynamics 365 S2 Website Content editor interface. The top navigation bar includes the Dynamics 365 logo, a search bar, and various utility icons. The left sidebar contains a navigation menu with categories like Customer Pages, Partners and Staff, and Product Pages. The main content area shows the configuration for a 'List' section. The 'General' tab is active, displaying fields for Name (List), Page (Products), and Display Order (50). Below this, the 'Content (HTML)' tab is selected, showing a code editor with the following Liquid code: 

```
{% include 'Products/List' productFamily:"c74310c1-c6ae-eb11-8236-000d3a312c4a" %}
```



# ShareSquared: ShareSquared Product Licensing Solution

## Licensable Products



Dynamics 365

S<sup>2</sup> Licensing

Search

New look

Home

Recent

Pinned

Group1

Customer Licenses

Licensable Products

License Activations

Active Licensable Products

Edit columns

Edit filters

<input type="checkbox"/> Name ↑	Created On
<input type="checkbox"/> Advanced Search Template Gallery	8/14/2023 12:53 PM
<input type="checkbox"/> Classification Portal	8/11/2022 11:20 AM
<input type="checkbox"/> Multilingual Solution	1/6/2022 9:30 AM
<input type="checkbox"/> Public Access Portal	1/6/2022 11:36 AM
<input type="checkbox"/> Taxonomy Tiles for Outlook	8/9/2021 10:48 AM
<input type="checkbox"/> Taxonomy Tiles for Windows	8/9/2021 10:36 AM
<input type="checkbox"/> Taxonomy Tiles Gallery	9/23/2021 7:47 AM
<input type="checkbox"/> User Adoption Package	8/18/2021 12:10 PM



# ShareSquared: ShareSquared Product Licensing Solution

## Product Licenses



Dynamics 365

S<sup>2</sup> Licensing

Search

New look

+

?

Home

Recent

Pinned

Group1

Customer Licenses

Licensable Products

License Activations

Show Chart

New

Delete

Refresh

Visualize this view

Email a Link

Flow

Run Report

Excel Templates

Export to Excel

Share

Active Customer Licenses

Edit columns

Edit filters

Filter by keyword

<input type="checkbox"/>	License Key ↑	Contact	Expiration Date	Product	Purchased Acti...	Domain	Licensed Urls	Status
<input type="checkbox"/>	000001-afsc-4dce-ef7eea2118600e4e8d9ac529d32db10f	Greg Lucht	7/14/2024	User Adoption Packag	1	agfsc.sharepoint...		Active
<input type="checkbox"/>	000001-bpl-4e1d-50cf8b77cf8a6a20b1b752fac33f9677	Nelson Wu	10/1/2024	User Adoption Packag	1	lyncbbrpartners.s...		Active
<input type="checkbox"/>	000001-cfs-4c66-c0ed90da693d385ce059132bec61e994	Cameron King	7/19/2023	User Adoption Packag	1	civicfs.sharepoint....		Active
<input type="checkbox"/>	000001-gvea-4d19-25aaf61e556ddf49413e40bb3c66252f	Stacey Baldrige	1/15/2024	User Adoption Packag	1	goldenvalleyelect...		Active
<input type="checkbox"/>	000001-krcd-4e6f-e85077d5a09b1467dbd054cd7be83c7d	Corey McLaughlin	12/22/2024	User Adoption Packag	1	krcd1.sharepoint...		Active
<input type="checkbox"/>	000001-lc-4d8d-cc1c42951400d8537ae2137d2ab51e77	Lisa Rangen	5/10/2024	User Adoption Packag	1	lacombecounty.s...		Active
<input type="checkbox"/>	000001-mil-4e8d-1c69f189d84353f9f216b2496d394ae0	Subin Kurien	1/21/2025	User Adoption Packag	1	morguard.sharep...		Active
<input type="checkbox"/>	000001-si-4d19-bd712337a283b022a9e4d10fe2b6a603	Ted Iverson	1/14/2024	User Adoption Packag	1	8rg2qq.sharepoin...		Active
<input type="checkbox"/>	000001-si-5599-77b0bff1b953c48c363c1a34cf905bd3	David Kruglov	12/30/2029	User Adoption Packag	1	sharesquared.sha...		Active
<input type="checkbox"/>	000001-si-59e1-57f40db6db5297041ade79f5d94e4b0c	David Kruglov	12/30/2032	User Adoption Packag		enterpriserecords...		Active
<input type="checkbox"/>	000002-sharesquared-5874-7868027751b5fbdce8e2b756a3c23...	Jim Duncan	12/31/2031	Multilingual Solution	1	enterpriserecords...		Active
<input type="checkbox"/>	000002-si-4e78-32feb507ffd6a7d3f4dd0af09c887137	Ted Iverson	12/30/2024	Multilingual Solution	1	8rg2qq.sharepoin...		Active
<input type="checkbox"/>	000003-lc-4d8d-420af32072f630e9dfa83c67bff78b32	Lisa Rangen	5/10/2024	Taxonomy Tiles for Wi	10			Active



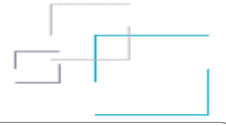
# ShareSquared: Overview

## 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



**Microsoft**  
Solutions Partner  
Modern Work

**Microsoft**  
CERTIFIED  
Master



**Microsoft 365**



**Azure**



Microsoft  
Dynamics 365



**PowerApps**

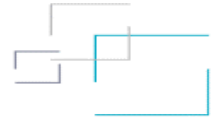


# ShareSquared: Example Local Government Customers

- **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

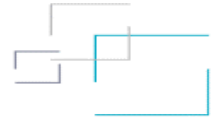
- Connect to back-office systems (e.g. HRIS, ERP)
- Bidirectional updates
- Data Visualization
- Dashboards
- Process Improvement

### 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

The screenshot displays the ShareSquared Taxonomy Package interface. It includes a 'Select Content Type(s)' list on the left, a 'Slice' configuration area at the top right, a large matrix view in the center, a list of content types at the bottom left, and a 'Deploy' dialog box at the bottom right.

**Select Content Type(s)**

- Advance Notice File
- Energy Project Proposal File
- Legal Case File
- Legal Document
- Legal Proceeding File
- Legal Project Management Database Document
- Legislative Review File
- OGC 248 Agenda
- Pre-Application Consultation File
- PUC Investigation File
- SCT Appeal File2

**Slice**

Administration Base Compliance Finance Hazardous Sites Legal  
Permitting Planning and Manage... Stormwater Training Waste Haulers WWW

**Matrix View**

Name	Business Unit	Document Type	Document Owner	Free Document Date	Description	Address	Tribunal ID	Town(s)	Project Type(s)	Program(s)	Date	End Date	SPAN	Assigned To	Database Version	Number	Act Number	Date Initiated	Date Introduced	Date Abandoned	Start Date	Notification Date	Date Passed	Party(s)	Applicant	Appellant	Developer	Grand Total
Legal Document																												8
OGC 248 Agenda																												7
Legal Project Management Database Document																												8
Legislative Review File																												11
Legal Case File																												10
Pre-Application Consultation File																												12
Legal Proceeding File																												11
PUC Investigation File																												12
																												14
																												15
																												14

**Content Type List**

Name	Description	Visibility	Classified	Managed By	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-opsls
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-opsoc
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-cscd
Information Technology	Information Technology team site	Private		Teams	prd-csit
Legal	Legal team site	Private		Teams	prd-cslg
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-csmktcx
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-csermcrm
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	Private		Teams	prd-cpp
Submissions	Centralized site for working on Submission Packages	Private		Teams	prd-submissions

**Deploy Dialog**

Platform: SharePoint Online  
Site URL: https://sharesquared.sharepoint.com/sites/tedtest6  
User Name: tiverson@sharesquared.com  
Password: [masked]  
Rename (GO2): [empty]  
☒ 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.

The screenshot shows a search interface for a 'Public Access Portal'. At the top, there is a search bar with the word 'Invoice' entered, and buttons for 'Search' and 'Clear'. Below the search bar, there are filters for 'Title', 'Modified' (with date pickers for 'Tue Jan 01 2019' and 'Tue Dec 31 2019'), and 'Document Type' (set to 'Request for Proposal'). The main section displays 'Results (13)' in a table with columns for 'Title', 'Summary', and 'Modified'. The table lists various requests for proposals (RFPs) and documents, such as 'Island County ECM RFP 2019', 'City of Eugene OR - SharePoint Intranet RFP', and 'City of Surrey BC ECM Migration To SharePoint RFP'. At the bottom, there are pagination controls showing '1' and '2' with a 'View All' button, and a link to 'Make Manual Request'.

## 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

