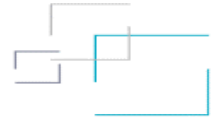


ShareSquared, Inc.

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



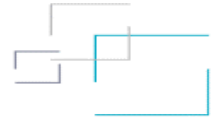
Objective

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

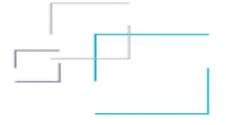


Use Case

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- A public-facing application that enables website visitors to search for “published” records and/or request “unpublished” records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 Content Search and/or eDiscovery to compile responses***
- ***Using Retention Labels and Policies to manage document/record lifecycles***

Webinar: Session Review



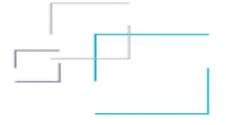
Session 1

- 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

Session 2

- 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

Webinar: Today's Focus



Microsoft Purview

- Content Search
 - Find and Export content that matches the query
- eDiscovery
 - Search + Case Management, Holds, etc.
- Retention Labels and Policies
 - Manage document/record lifecycles
 - Date and Event-based Retention (e.g. Closed Project)
 - Disposition Review and Processing
- [Compliance Solution Accelerator](#)
- Recap & QA
 - Anything from a prior session that you want to see again?
 - Ideas for future webinars?



Closing: Questions and Next Steps

- Interested in a demo for your organization?
- Need an estimate for a project?
- Questions about our Solution Accelerators?
- Ideas for future webinars?
- Please email me at David@ShareSquared.com!



share²

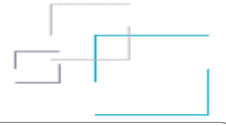
ShareSquared: Overview

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



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

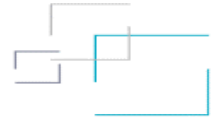


Microsoft Partner Network 2024-2025 Program Year

- **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. On the left, a 'Select Content Type(s)' list includes items like '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', and 'SCT Appeal File2'. The main area features a 'Slice' section with filters for Administration, Base, Compliance, Finance, Hazardous Sites, Legal, Permitting, Planning and Manage..., Stormwater, Training, Waste Haulers, and WWW. Below this is a large matrix view with columns for various metadata fields (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) and rows for different content types. A 'Deploy' dialog box is open in the bottom right, showing fields for Platform (SharePoint Online), Site URL (https://sharesquared.sharepoint.com/sites/tedtest6), User Name (tiverson@sharesquared.com), Password, and Rename (GO2). It also has checkboxes for Site Columns, Content Types, Site Column Mappings, Libraries, and Content Type Mappings.

Name	Description	Visibility	Classified	Managed by	URL
Sales	Sales communication site	Private	Teams	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	Private	Teams	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-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	Private	Teams	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	Private	Teams	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	Private	Teams	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	Private	Teams	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	Private	Teams	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-cserpp	
Submissions	Centralized site for working on Submission Packages	Private	Teams	prd-submissions	

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.

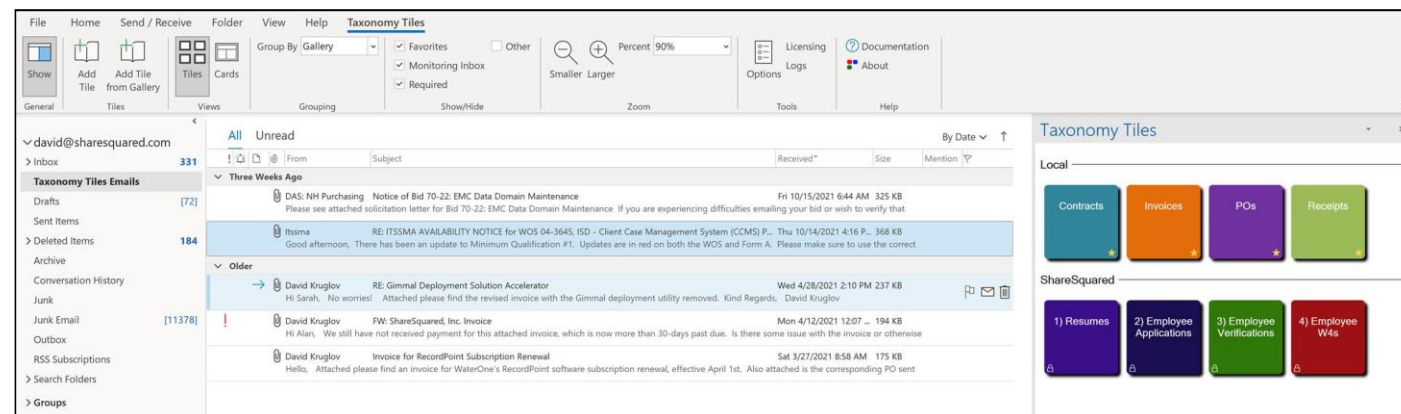
The screenshot shows a search interface for the Public Access Portal. At the top, there is a search bar with a 'Search' button and a 'Clear' button. Below the search bar, there are filters for 'Title', 'Modified' (with date pickers for 'Tue Jan 01 2019' and 'Tue Dec 31 2019'), and 'Document Type' (with a dropdown menu set to 'Request for Proposal'). The main area displays 'Results (13)' in a table with columns for 'Title', 'Summary', and 'Modified'. The table lists various documents, including 'Island County ECM RFP 2019', 'City of Eugene OR - SharePoint Intranet RFP', 'City of Surrey BC ECM Migration To SharePoint RFP', 'Roaring Fork Transportation - Intranet RFP', 'KCATA ERM RFP', 'City of Owen Sound EDRMS RFP', 'County of Spokane Document Management Workflow ...', 'EMWD - ECMS Replacement', 'CDIC SharePoint Migration to O365', and 'Contra Costa County - Document Scanning & Indexing...'. At the bottom of the results, there are pagination controls showing '1' and '2' with arrows, and a 'View All' button. A link 'Can't find what you're looking for? Make Manual Request' is also present.

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



Union Sanitary District



www.unionsanitary.com



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

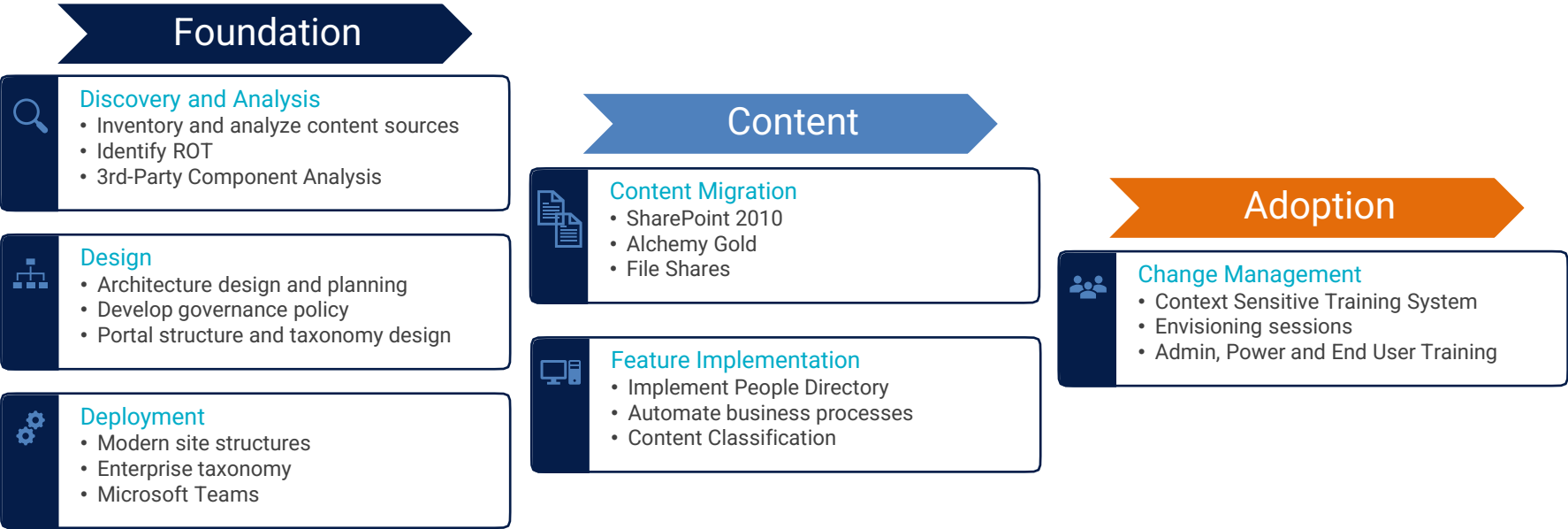
IT Administrator, Union Sanitary District



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

Strategy and Solution Components





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.

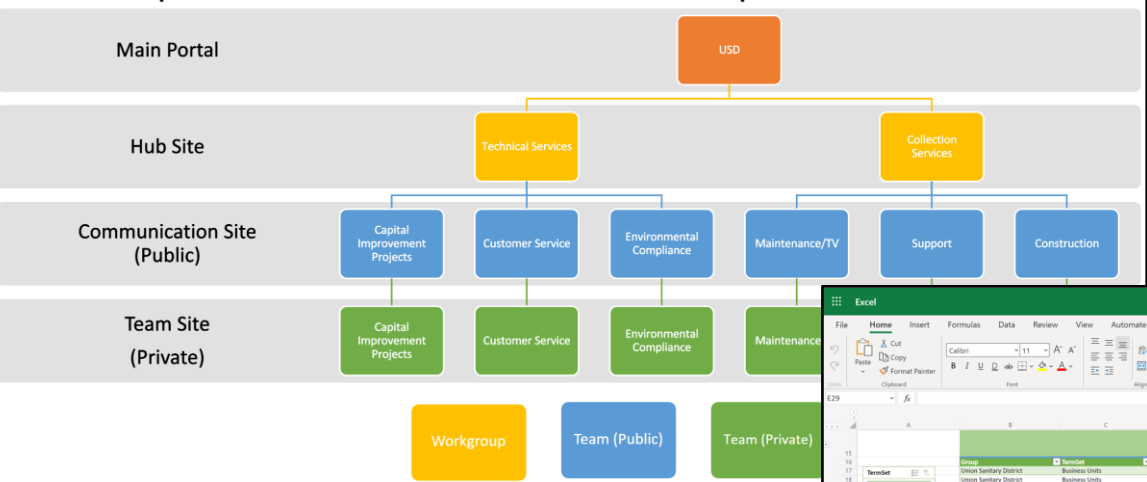
Union Sanitary Project Visuals



Records Retention Schedule

	A	B	C	D	E	F
2	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			

Conceptual Architecture- Complex



Project Tasks in Planner Synced with Project Online

The screenshot displays the Microsoft Planner interface for the project "USD - O365 Migration". The interface is divided into several sections: "Discovery and Planning", "Collab and Intranet", "Migration", "Change Management", and "Project Control". Each section contains a list of tasks with "Add task" buttons. The "Project Control" section includes a "Meeting Series" dropdown and a "Budget Contingency" section. The interface also shows a "Members" list and a "Filter (0)" dropdown.

The screenshot shows the "M365 Portal Creation Workbook" Excel spreadsheet. The spreadsheet is organized into columns for "Group", "Service", "Type", "Status", "Availability", and "Labels". It lists various services and their associated groups and statuses. The "Managed Metadata" section is highlighted, showing a list of metadata items with their respective status and labels.

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

Business Dashboard

M365 Portal Creation Workbook

Fairfield Suisun Sewer District



www.fssd.com



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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800.445.1279

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M365 Portal Creation Workbook

Construction Management	<i>(Includes capital, major maintenance, reclaimed water, collection system and drainage maintenance projects)</i>	
Planning and Engineering	Contracts with consultants, correspondence, meeting minutes, project status reports for Board, plans, specifications, reports, easement preparation, permits including environmental permits	Project completion + 10
Planning and Engineering	Technical memoranda, predesign reports, technical reports	Indefinite
Bid Sets	Plans and Specs used for bidding but not construction	Project Completion + 1
Bids	Bids and rejected bids	Project completion + 10
Awards of Contract		Project completion + 10

Formset

Account

Business Units

Case Types

Document Types

Record Categories

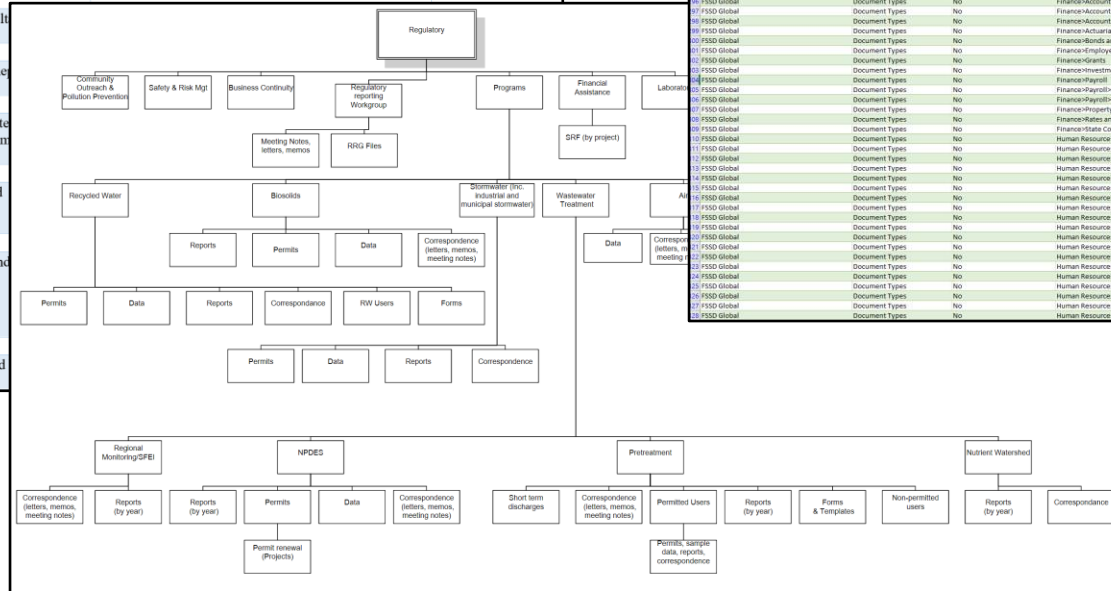
Process

No

Yes

Managed Metadata

Form	Form Code	Form Description	Authority	Keep	Expiry	Form	Form Code	Form Description	Authority	Keep	Expiry	Form	Form Code	Form Description	Authority	Keep	Expiry
15/ISO global	Form	Construction Management-Awards of Contract	Yes	Available for Tagging	Includes Children	Form	C0007	Bids and rejected bids	10	Years	15/ISOeDocForm	Form	C0008	Potential changes, change orders, requests for clarification, minor changes and clarifications	10	Years	15/ISOeDocForm
15/ISO global	Document Types	Construction Management-Bids	No			Form	C0007	Bids and rejected bids	10	Years	15/ISOeDocForm	Form	C0008	Potential changes, change orders, requests for clarification, minor changes and clarifications	10	Years	15/ISOeDocForm
15/ISO global	Document Types	Construction Management-Contract Changes and Clarifications	Yes			Form	C0008	Potential changes, change orders, requests for clarification, minor changes and clarifications	10	Years	15/ISOeDocForm	Form	C0009	Confirmed specifications, record drawings, as built, equipment OEM manuals, and all	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Construction Management-Contract Close Out	No			Form	C0009	Confirmed specifications, record drawings, as built, equipment OEM manuals, and all	1999	Years	15/ISOeDocForm	Form	C0010	Confirmed specifications, record drawings, as built	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Construction Management-Contractor Submittals	Yes			Form	C0010	Confirmed specifications, record drawings, as built, equipment OEM manuals, and all	1999	Years	15/ISOeDocForm	Form	C0011	Confirmed specifications, record drawings, as built	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Construction Management-Contracts with Consultants	Yes			Form	C0011	Confirmed specifications, record drawings, as built, equipment OEM manuals, and all	1999	Years	15/ISOeDocForm	Form	C0012	Confirmed specifications, record drawings, as built	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Construction Management-Correspondence	Yes			Form	C0012	Confirmed specifications, record drawings, as built, equipment OEM manuals, and all	1999	Years	15/ISOeDocForm	Form	C0013	Confirmed specifications, record drawings, as built	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Construction Management-Inspection Reports and Reports	Yes			Form	C0013	Confirmed specifications, record drawings, as built, equipment OEM manuals, and all	1999	Years	15/ISOeDocForm	Form	C0014	Confirmed specifications, record drawings, as built	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Construction Management-Photographs and Videos	No			Form	C0014	Confirmed specifications, record drawings, as built, equipment OEM manuals, and all	1999	Years	15/ISOeDocForm	Form	C0015	Confirmed specifications, record drawings, as built	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Construction Management-Planning and Engineering	No			Form	C0015	Confirmed specifications, record drawings, as built, equipment OEM manuals, and all	1999	Years	15/ISOeDocForm	Form	C0016	Confirmed specifications, record drawings, as built	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Construction Management-Planning and Engineering-Project Documents	Yes			Form	C0016	Confirmed specifications, record drawings, as built, equipment OEM manuals, and all	1999	Years	15/ISOeDocForm	Form	C0017	Confirmed specifications, record drawings, as built	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Construction Management-Planning and Engineering-Technical Documents	Yes			Form	C0017	Confirmed specifications, record drawings, as built, equipment OEM manuals, and all	1999	Years	15/ISOeDocForm	Form	C0018	Confirmed specifications, record drawings, as built	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Construction Management-Railway Notices and Stop Notices	Yes			Form	C0018	Confirmed specifications, record drawings, as built, equipment OEM manuals, and all	1999	Years	15/ISOeDocForm	Form	C0019	Confirmed specifications, record drawings, as built	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Construction Management-Progress Payments	Yes			Form	C0019	Confirmed specifications, record drawings, as built, equipment OEM manuals, and all	1999	Years	15/ISOeDocForm	Form	C0020	Confirmed specifications, record drawings, as built	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Construction Management-Purchase of Equipment	Yes			Form	C0020	Confirmed specifications, record drawings, as built, equipment OEM manuals, and all	1999	Years	15/ISOeDocForm	Form	C0021	Confirmed specifications, record drawings, as built	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Construction Management-Record Plans and Specifications	Yes			Form	C0021	Confirmed specifications, record drawings, as built, equipment OEM manuals, and all	1999	Years	15/ISOeDocForm	Form	C0022	Confirmed specifications, record drawings, as built	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Construction Management-Safety Records and Reports	Yes			Form	C0022	Confirmed specifications, record drawings, as built, equipment OEM manuals, and all	1999	Years	15/ISOeDocForm	Form	C0023	Confirmed specifications, record drawings, as built	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Construction Management-Soil and Pile Test Reports	Yes			Form	C0023	Confirmed specifications, record drawings, as built, equipment OEM manuals, and all	1999	Years	15/ISOeDocForm	Form	C0024	Confirmed specifications, record drawings, as built	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Finance-Accounting	Yes			Form	F0001	Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal v	1999	Years	15/ISOeDocForm	Form	F0002	Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal v	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Finance-Accounting-Reports	Yes			Form	F0002	Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal v	1999	Years	15/ISOeDocForm	Form	F0003	Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal v	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Finance-Accounting-Supporting Reports	Yes			Form	F0003	Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal v	1999	Years	15/ISOeDocForm	Form	F0004	Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal v	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Finance-Accounts Payable	Yes			Form	F0004	Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal v	1999	Years	15/ISOeDocForm	Form	F0005	Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal v	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Finance-Accounts Payable-bill Invoices	Yes			Form	F0005	Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal v	1999	Years	15/ISOeDocForm	Form	F0006	Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal v	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Finance-Accounts Payable-invoices	Yes			Form	F0006	Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal v	1999	Years	15/ISOeDocForm	Form	F0007	Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal v	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Finance-Accounts Receivable	Yes			Form	F0007	Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal v	1999	Years	15/ISOeDocForm	Form	F0008	Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal v	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Finance-Actual Studies	Yes			Form	F0008	Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal v	1999	Years	15/ISOeDocForm	Form	F0009	Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal v	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Finance-Bonds and Loans	Yes			Form	F0009	Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal v	1999	Years	15/ISOeDocForm	Form	F0010	Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal v	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Finance-Employee Training Records	Yes			Form	F0010	Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal v	1999	Years	15/ISOeDocForm	Form	F0011	Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal v	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Finance-Grants	Yes			Form	F0011	Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal v	1999	Years	15/ISOeDocForm	Form	F0012	Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal v	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Finance-Investments/Banking	Yes			Form	F0012	Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal v	1999	Years	15/ISOeDocForm	Form	F0013	Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal v	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Finance-Payroll	No			Form	F0013	Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal v	1999	Years	15/ISOeDocForm	Form	F0014	Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal v	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Finance-Payroll-Payroll Processing and Payroll Payables	No			Form	F0014	Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal v	1999	Years	15/ISOeDocForm	Form	F0015	Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal v	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Finance-Payroll-Tax	Yes			Form	F0015	Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal v	1999	Years	15/ISOeDocForm	Form	F0016	Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal v	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Finance-Property Tax Filings	Yes			Form	F0016	Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal v	1999	Years	15/ISOeDocForm	Form	F0017	Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal v	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Finance-Rates and Connection Fees Studies	Yes			Form	F0017	Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal v	1999	Years	15/ISOeDocForm	Form	F0018	Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal v	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Finance-State Controller's Reports	Yes			Form	F0018	Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal v	1999	Years	15/ISOeDocForm	Form	F0019	Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal v	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Human Resources-Candidate Paper Documents	Yes			Form	H0001	Annual State Controller's Reports	1999	Years	15/ISOeDocForm	Form	H0002	Annual State Controller's Reports	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Human Resources-CAPERS	Yes			Form	H0002	Annual State Controller's Reports	1999	Years	15/ISOeDocForm	Form	H0003	Annual State Controller's Reports	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Human Resources-Classification and Compensation Studies	Yes			Form	H0003	Annual State Controller's Reports	1999	Years	15/ISOeDocForm	Form	H0004	Annual State Controller's Reports	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Human Resources-Deferred Related to Deferred Compensation	Yes			Form	H0004	Annual State Controller's Reports	1999	Years	15/ISOeDocForm	Form	H0005	Annual State Controller's Reports	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Human Resources-Deferred Compensation Plan Documents	Yes			Form	H0005	Annual State Controller's Reports	1999	Years	15/ISOeDocForm	Form	H0006	Annual State Controller's Reports	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Human Resources-DMV Government Information Requests	Yes			Form	H0006	Annual State Controller's Reports	1999	Years	15/ISOeDocForm	Form	H0007	Annual State Controller's Reports	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Human Resources-Employee DMV Records	Yes			Form	H0007	Annual State Controller's Reports	1999	Years	15/ISOeDocForm	Form	H0008	Annual State Controller's Reports	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Human Resources-Employee Medical Records	Yes			Form	H0008	Annual State Controller's Reports	1999	Years	15/ISOeDocForm	Form	H0009	Annual State Controller's Reports	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Human Resources-Employment Policies	Yes			Form	H0009	Annual State Controller's Reports	1999	Years	15/ISOeDocForm	Form	H0010	Annual State Controller's Reports	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Human Resources-Health, Dental and Vision Plan Documents	Yes			Form	H0010	Annual State Controller's Reports	1999	Years	15/ISOeDocForm	Form	H0011	Annual State Controller's Reports	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Human Resources-Issues Descriptions	Yes			Form	H0011	Annual State Controller's Reports	1999	Years	15/ISOeDocForm	Form	H0012	Annual State Controller's Reports	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Human Resources-Personnel Files	Yes			Form	H0012	Annual State Controller's Reports	1999	Years	15/ISOeDocForm	Form	H0013	Annual State Controller's Reports	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Human Resources-Personnel Files-Instructions	Yes			Form	H0013	Annual State Controller's Reports	1999	Years	15/ISOeDocForm	Form	H0014	Annual State Controller's Reports	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Human Resources-Recording Records	Yes			Form	H0014	Annual State Controller's Reports	1999	Years	15/ISOeDocForm	Form	H0015	Annual State Controller's Reports	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Human Resources-Salary and Benefit Summaries	Yes			Form	H0015	Annual State Controller's Reports	1999	Years	15/ISOeDocForm	Form	H0016	Annual State Controller's Reports	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Human Resources-Security Award Policy and Penalties	Yes			Form	H0016	Annual State Controller's Reports	1999	Years	15/ISOeDocForm	Form	H0017	Annual State Controller's Reports	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Human Resources-Short-Term Disability, Long-Term Disability, Life Insurance, and Retiree Yes	Yes			Form	H0017	Annual State Controller's Reports	1999	Years	15/ISOeDocForm	Form	H0018	Annual State Controller's Reports	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Human Resources-Workers Compensation Claims	Yes			Form	H0018	Annual State Controller's Reports	1999	Years	15/ISOeDocForm	Form	H0019	Annual State Controller's Reports	1999	Years	15/ISOeDocForm
15/ISO global	Document Types	Human Resources-Workers Compensation Claims and Correspondence	Yes			Form	H0019	Annual State Controller's Reports	1999	Years	15/ISOeDocForm	Form	H0020	Annual State Controller's Reports	1999	Years	15/ISOeDocForm



		OneDrive						Exchange			
Role	Default Classification	Has OneDrive	File Quota	Sharing	Document Retention	Auto Pruning	Has Mailbox	Email Archive	Auto Prune	Email Retention	
Director	Restricted	Yes	None	External	None	5Y	Yes	1Y	30D	5Y	
Supervisor	Restricted	Yes	None	External	None	5Y	Yes	1Y	30D	5Y	
Office Worker	Restricted	Yes	None	External	None	5Y	Yes	1Y	30D	5Y	
Field Worker	Restricted	Yes	100GB	External	None	5Y	Yes	1Y	30D	5Y	

Keep since Modified

Delete unchanged

Move from Inbox

Empty Deleted

Keep in Archive

Unrestricted	Matter of Public Record - Anyone could read
Confidential	Contains PII and/or volatile trade secrets
Protected	Should only be viewed by staff (Internal)
Restricted	Specific staff only

*Adapted from CAPSTONE methodology

Regulatory Mapping

OneDrive/Exchange Retention Policies