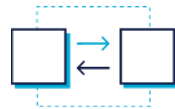


# Implement a Full-featured Records Management Solution Across Multiple Repositories



**Unify**  
Your Infrastructure



**Manage**  
People and Teams



**Modernize**  
Business Solutions

May 2020

share<sup>2</sup>

# Presenters: Implement a full featured multi-repository EDRMS

- **Dean Misenhimer**

Director of Sales Engineering



- **Jim Duncan**

Chief Architect, ShareSquared  
Microsoft Certified Master



- **David Kruglov**

Managing Director



# Agenda: Implement a full featured multi-repository EDRMS

## Introduction and Overview

- Recap O365 strengths as a Records Repository
- Filling the gaps in O365's Records Management (EDRMS) features

## Taxonomy, Classification, and Case Records

- Progressive Search Demo
- Information Architecture (IA) and Taxonomy
- Record Classification/Identification Made Easy
- Dealing with Case Records in O365

## Gimmel Records Management

- Hierarchical File Plan
- Case-based Records Management
- Multi-Phase Retention Lifecycles
- Physical Records Management
- Disposition Management

## Closing and *Extended QA*

# Intention: Intention for the Webinar



- Further explore how O365 might be used as the foundation for an EDRMS solution
- Show how Gimmel enables you to manage content in multiple repositories from one dashboard/application
- Foster a community of people who endeavor to improve the effectiveness of their Records Management systems
- Answer any questions you may have
- Get your input for future webinar topics

***Be of Service to You!***

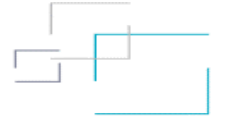
# ShareSquared: Who We Are



- Solution provider specializing in SharePoint/O365 for 15 years
- Collab/Intranet, EDRMS, Workflow, Migration, etc. Solutions
- Implementation Partner and Reseller of the following:



# Poll: What Repositories Do You Have Content In?



## Select all that Apply:

- SharePoint, O365, and/or OneDrive
- File Shares
- Physical/Paper Records in Storage
- Box, Dropbox, Google Docs
- FileNet, OpenText, Laserfiche, etc.

Next Up:

- *O365 EDRMS Strengths and Weaknesses Recap*

# 0365 Strengths: Recap from Last Webinar



## ■ **Ubiquity**

- Over 400,000 Orgs and 70+% of the Fortune 500 use 0365
- Over 200M Active 0365 Users and 44M Active Teams Users

## ■ **Productivity**

- [Todo](#), [Planner](#), [Bookings](#), [Built-in Workflows](#), [Power Automate](#)

## ■ **Reliability and Security**

- e.g. 3-year avg of 99.979% uptime → 1h 50m 27s downtime/yr.

## ■ **Compliance and Certifications**

- [Microsoft Trust Center](#)
- [0365 Compliance Offerings](#)
- [0365 GCC High and DoD](#)

# 0365 Strengths: Recap from Last Webinar



- **Integration**

- Office Suite and Exchange
- [Business Connectivity Services](#)
- [Microsoft Graph APIs](#) and [Management APIs](#)
- [Power Automate Connectors](#)

- **Analytics**

- [Power BI](#), [Usage Analytics](#), [MyAnalytics](#)

- **Modern Architecture and Innovation**

- [Weekly Digest](#) and [Project Cortex](#)

- **Connected Cloud and Cost Savings**

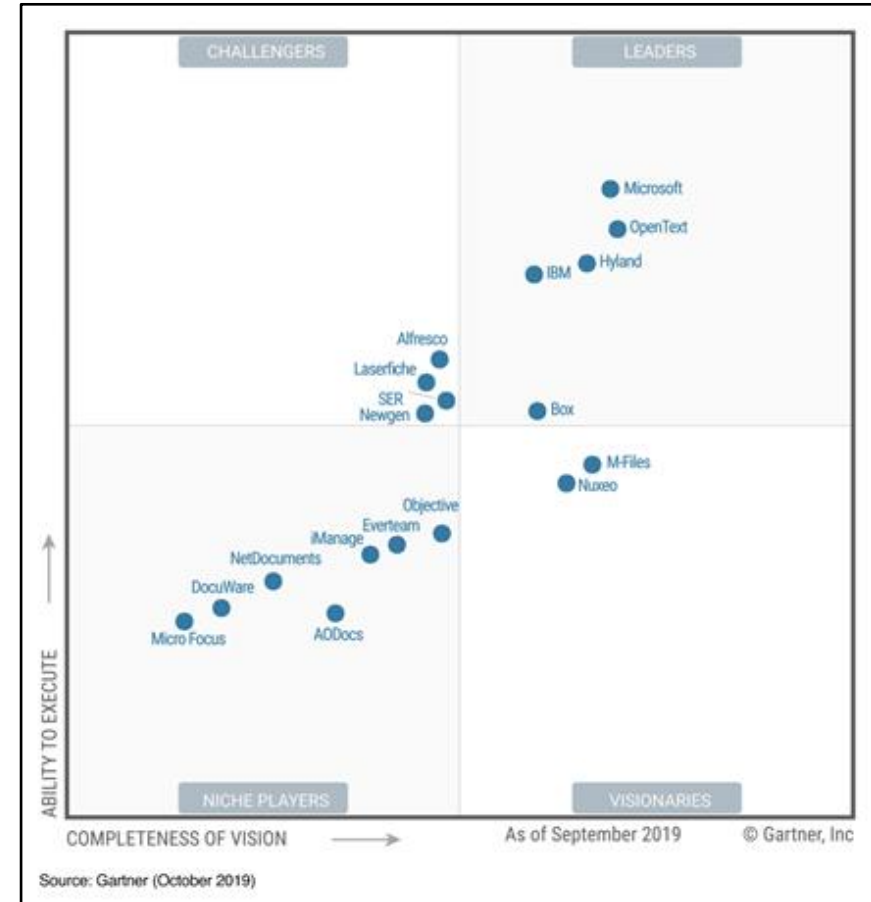


# 0365 Strengths: Recap from Last Webinar



## 0365 Leads the following Gartner Quadrants:

- Content Services Platforms
- Content Collaboration Platforms
- Enterprise Information Archiving
- Analytics and BI Platforms
- Unified Endpoint Management
- Cloud Access Security Broker
- Enterprise Integration Platform



# 0365 Weaknesses: Recap from Last Webinar

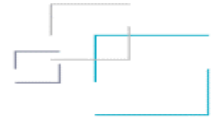


## Examples:

- Features are complex and still evolving
- End users can apply/change Retention Labels
- Policies are at the Content Type level resulting in a very complex taxonomy
- Requires end user involvement
- No support for Physical Records
- Record Center automatically locks documents
- Many of the features require an E5 License



# 0365 Weaknesses: Filling the Gaps with Gimmel



## Gimmel Builds on 0365 Strengths:

- Hierarchical File Plan with well-defined Record Categories
- In-place, centralized management across repositories
- Automatic Classification and Record Declaration when appropriate
- Rule-Based Retention and Supersedence
- Extended support for retention triggers (e.g. recurring dates)
- Multistage, parallel, and manual Lifecycle Management/Disposition
- Disposition review and approval workflows
- Destruction Certificates
- Enhanced auditing and reporting
- Configuration can be automated

Next Up:

➤ *Demos*

# Demos: Taxonomy, Classification, and Case Records



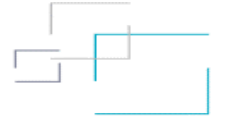
- Progressive Search Demo
- IA and Taxonomy
- Record Classification Made Easy
- Dealing with Case Records



Next Up:

➤ *Gimmel Overview and Demo*

# Poll: What Future Webinar Topics Interest You?



## Select all that Apply:

- Forms, Workflow, and RPA
- Maximizing O365 User Adoption
- How to Auto-Classify / Identify Documents
- O365 Document Capture, Indexing, and OCR
- Ask the Experts Panel



Gimmel exists because  
we believe people have  
better things to do than  
manage information.



Software customers  
in over **14 Countries**



Trusted solutions  
for over **17 Years**



A network of  
**Global Partners**



Over **500,000**  
**Licensed Users**

# Gimmel: Customer Examples



## Government



## Energy



Énergie NB Power

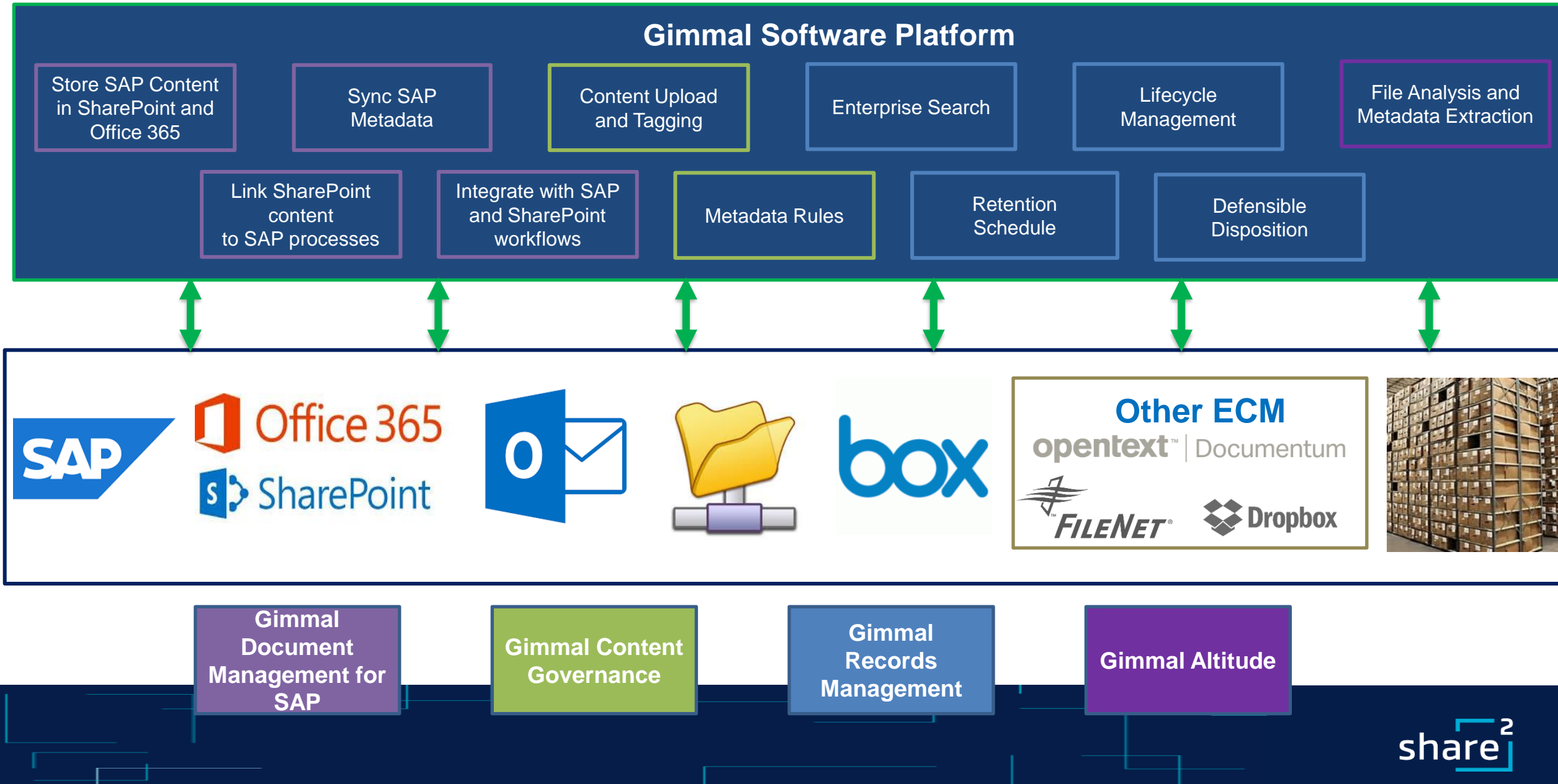


## Other





# Gimmal: Platform





# Gimmel: Advantage

Gimmel provides the most comprehensive and innovative solutions for solving complex Records and Information Management challenges because we believe people have more important things to do than manage information!

## Innovative



Cloud platform built on Azure using containers and micro services



Industry leading lifecycle automation built for the modern workplace



On-demand web-based software makes critical information accessible on any device, anywhere, anytime

## Certified



## Proven



Software deployed in over **14 different countries**



Satisfied customers in **every major industry**



Over **500,000 licensed** end users

# Demos: Gimmel



- Hierarchical File Plan
- Case-based Records Management
- Multi-Phase Retention Lifecycles
- Physical Records Management
- Disposition Management



Next Up:

➤ *Recap and Closing*

# **Poll:** Would you like us to follow up with you?



- By Email
- By Phone
- Not at this time

Next Up:

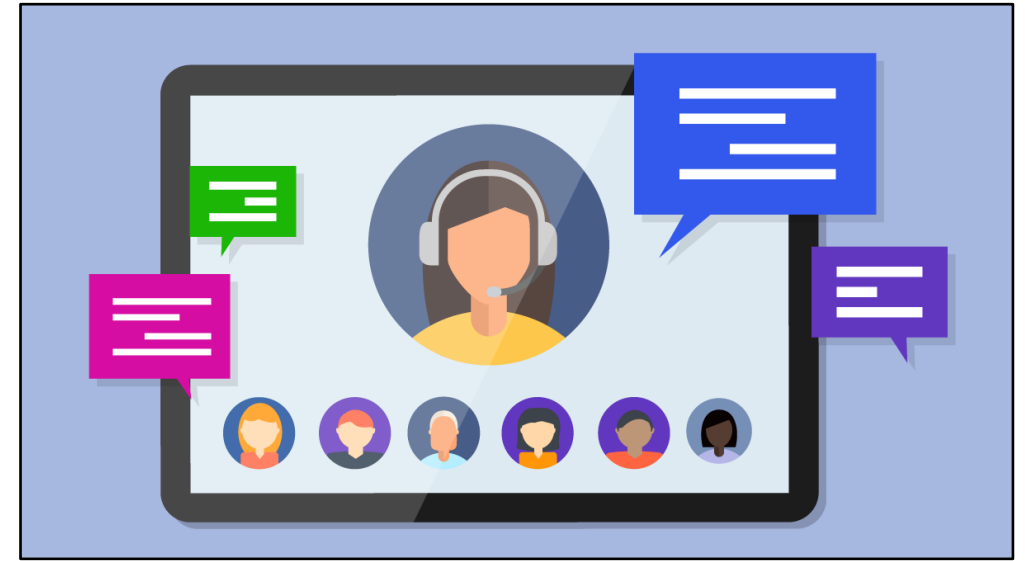
➤ *Recap and Extended QA*

# ShareSquared: Resources



## EDRMS Webinar Series

- Manage Email Records as part of a Holistic EDRMS Solution  
June 17<sup>th</sup>
- Additional Webinars TBD based on your feedback



## On the Web

- [Previous Webinar Presentations and Recordings](#)
- [Information about Gimmel](#)
- [Contact Us for an Extended Demo or Estimate](#)

# Closing: Recap and *Extended* QA



## Webinar Series Part 1 & 2:

- Developing an Effective RIM Program
- Modern Retention Schedule and Taxonomy
- Why consider O365 as a Records Repository
- What works and what's missing

## Today:

- Implement a full-featured EDRMS Solution across multiple repositories

## Next Up:

- Managing Email Records as part of a holistic EDRMS solution

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