ShareSquared, Inc. – Sole Source Justification

ShareSquared holds the following certifications, credentials, and/or designations:

Gold or Silver Competencies in the Microsoft Partner Network, as of March 2021:

- **Gold Competency in Cloud Productivity**
- **Gold Competency in Cloud Platform**
- **Gold Competency in Datacenter**
- **Gold Competency in Collaboration and Content**
- Silver Competency in Small and Midmarket Cloud Solutions
- Silver Competency in Enterprise Mobility
- Silver Competency in Small and Midmarket Cloud Solutions
- Silver Competency in Messaging
- **Microsoft Certified Content Services Partner –** *ECM/EDRMS applications and SharePoint Syntex*
- **Microsoft Adoption and Change Management Advanced Specialization**
- **SharePoint Microsoft Certified Masters (MCM)** *- this is an exclusive/extraordinary credential as there are only 24 MCM in North America outside of Microsoft*
- **RIMTech Records Management Certification** *- exclusive credential*
- **Microsoft Certified SharePoint Deployment and Planning Services (SDPS) provider –** *this enables us to consume planning vouchers that come with Microsoft Enterprise Agreements*
- Microsoft Cloud Accelerate Partner
- Microsoft Office 365 FastTrack Partner
- Member of the Microsoft Technology Adoption Program (TAP)
- Member of the Microsoft Partner Research Panel (MSPRP)

Microsoft Partner

Gold Cloud Platform
Gold Cloud Productivity
Gold Collaboration and Content
Gold Datacenter
Silver Small and Midmarket Cloud Solutions

Our Partnerships:

ShareSquared is a Gold Level Partner, Authorized Reseller, and/or has utilized the following SharePoint companion products including the following:

- RecordPoint, Gimmal, and Collabware Records Management
- KnowledgeLake Document Capture, Content Services, and RPA
- Harmon.ie and Colligo Email Management/Integration
- BindTuning Premium Design and Branding Themes and Web Parts
- VisualSP Context Sensitive Help/Training System
- Plumsail Electronic Forms and Workflow
- AquaForest OCR for O365
- Netwrix Content Identification/Auto-Classification
- WAND prebuilt industry and functional Term Sets
- DocuSign Digital Signatures
- Ephesoft Advanced Document Capture
- SkySync Large-scale Migration and Repository Sync (e.g. SharePoint , O365, OneDrive, Box, Dropbox)
- Nintex Workflow and Electronic Forms
- Various migration tools including ShareGate, AvePoint, Metalogix, Tsunami, etc.

One-Of-A-Kind Products:

Public Access Portal: Our Public Access Portal product includes a public facing search application that can be placed on any *public web site* and enables *anonymous users* to search for documents in O365 based on search criteria that aligns to the taxonomy in O365. If users are unable to find the documents they are looking for via self-service, they can submit a manual request, which triggers a Power Automate Flow and/or is added to an internal-use O365 application that can be used to track and fulfill manual requests. Use cases for this product

include Public Records Request, Permits, etc.; virtually any application where organizations want to provide self-service access to documents in O365 based on appropriate permissions, location, and metadata.

Taxonomy deployment Package: Define your comprehensive taxonomy (Content Types, Term Sets, Site Columns, etc.) in an Excel Workbook and automatically deploy it to O365. This product includes:

- Prebuilt Content Types that serve as an accelerated starting point for the implementation of the taxonomy in O365/SharePoint, which is the foundation for Search, Document Lifecycle/Records Management, and Workflow
- An Information Architecture (IA) Workbook, which is a detailed project artifact that is informed by Records Management and Search requirements, and captures the Taxonomy as it is to be implemented. The IA Workbook serves to map the Taxonomy/IA requirements to the corresponding structures in O365/SharePoint (e.g. Sites, Site Columns, Content Types, Term Sets, etc.) and is used by the Taxonomy Deployment Utility to drive the deployment.
- A Taxonomy Deployment Utility (use license only), which is used to deploy the Taxonomy as defined in the IA Workbook to the target environment. The utility provides for a repeatable and error-free process that can be used to deploy to a Test environment, for iterative deployments and enhancements throughout the project, and for the final deployment to Production. Using this utility ensures that the Taxonomy/IA is deployed exactly as defined in the requirements and in accordance with best practices.

Portal Deployment Package: Design your Collaboration and Internet Team, Communication, and Hub Sites in an Excel Workbook and automatically deploy them to O365 including branding, taxonomy, pages, add-ins, etc.

User Adoption Package:

- **Taxonomy Tiles**: this component can be used in SharePoint Online and Microsoft Teams, and enables site owners to configure several tiles on a page with different colors, icons, descriptions, etc. Each tile is configured to apply a specific Content Type and default metadata to the documents dropped onto it. Case files or records are also supported enabling a user to both classify documents and associate them with a particular case (e.g. a specific Employee Record). The destination document library is configurable for each Tile so that, while the Tiles may all be on one page, the documents dropped onto them can be distributed to different document libraries and/or sites.
- **Advanced Search:** this web part renders search results in tabular form and enables the user to refine the results using metadata in the table, which is much easier than working with SharePoint's out of the box search results pages. This component also enables Power Users to pre-configure popular searches so that users do not have to create the queries each time.
- **Enhanced Metadata Capture and Reporting:** this component enables users with the requisite permissions to capture user-defined key/value pairs of metadata, which are searchable. This empowers organizations to crowd-source their users' taxonomy needs. Users can create taxonomy key/value pairs as needed without having to wait for formal taxonomy structures to be designed and implemented by IT, power-users, or governance bodies. The component includes a reporting tool that generates an Excel workbook report, which details how and where the component/metadata is being used. This report can be used by a governance committee to determine where enhancements to the formal taxonomy (Content Types and Term Sets) might be applied based on user inputs.

Multilingual add-in for O365: Add multilingual support for page content, Content Types, Column Names, Document Library Views, etc.

Reference Accounts (as of March 2021):

ShareSquared has significant project experience in various industries such as:

- **Northwest Community College District** SharePoint 2013 to O365 Migration and Modernization
- **City of Auburn, AL** SharePoint 2019 Upgrade, Intranet and City Solutions Agenda
- **Public Services Alliance of Canada** Intranet and EDRMS enterprise solution
- **Agricultural Financial Services Corporation, AB** Assessment/Strategic Plan, O365 Intranet and EDRMS
- **City of West Hollywood** Migration and Modern Intranet Solution
- **Civic Financial Services** O365 Intranet and EDRMS
- **Union Sanitary District** Migration and O365 Intranet Modernization
- **Ventura County Fire Department** O365 Intranet Design, Training and Support
- **City of Antioch** Modern Intranet Solution
- **Port of San Diego** eDiscovery Solution
- **Contra Costa Water District** O365 Assessment, O365 Migration, Workflow, and Modernization
- **Fairfield Suisun Sewer District** Intranet and EDRMS Solution
- **Golden Valley Electrical Association** O365 EDRMS Solution with Gimmal
- **City of Vallejo** Modern Intranet Solution
- **Morguard Corporation** O365 Intranet and Records Management
- **Brookfield Renewable** O365 Intranet and Records Management
- **San Diego County Water** EDRMS Solution with content auto-classification using ConceptSearching
- **State of Washington, Department of Ecology** Records Management Proof of Concept
- **State of South Carolina** Premium Branding Themes and Web Parts
- **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 File Plan and Roadmap solution
- **WaterOne, KS** EDRMS Solution with RecordPoint
- **City of Belmont, CA** Intranet, Project Management and Workflow Solution
- **County of San Diego** EDRMS Solution using Gimmal with integration to OpenText
- **County of Los Angeles County Clerk Registrar Recorder** Modern Intranet Solution
- **County of Los Angeles Dept. of Human Resources** Modern Intranet
- **State of Vermont** EDRMS Solution with RecordPoint
- **City of Salt Lake City, UT** Modern Intranet Solution and Content Migration
- **Sacramento Area Sewer District** FileNet Migration to SharePoint EDRMS
- **City of San Jose, CA** 40 Terabyte File Share Migration to O365
- **County of Los Angeles CIO's Office** O365 Intranet and Migration
- **County of San Mateo, CA** ECM/ERM solution on SharePoint
- **City of Pasadena, CA** SharePoint ECM/ERM solution with Gimmal
- **Gold Coast Health** Strategic Planning/Roadmap and O365 Intranet
- **County of Los Angeles Dept. Public Works** FileNet Migration to SharePoint ECM
- **City of Bellevue, WA** migration from Oracle to SharePoint with Gimmal
- **Imperial Irrigation District** FileNet to SharePoint Migration