Office 365 and SharePoint – Improving How Information Is Captured, Processed, and Managed

An AIIM Virtual Event

March 1, 2018

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The Community for Information Professionals

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making content work

Tips for Participating in Today's Event

- **Group Chat** – text each other and AIIM staff, found in the icons along the bottom. *(click the widget to open)*
  Note: everyone can see and participate.
- **Q&A** – for questions to the speakers (and tech help).
- Check out the **Resources**, to learn more about SharePoint and Office 365.
- Take our **Survey** – we value your feedback on how we did today. *(click the widget to open)*

Bob Larrivee, VP & Chief Analyst, AIIM

Connecting and Optimizing Office 365 – Reality or Fantasy?

Bob Larrivee
VP/Chief Analyst
AIIM

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Collaborative Environment

Fifty-nine percent of respondents use Office 365 as a collaboration and file-sharing system.

Executives Use It

Fifty percent of respondents report Office 365 is in use by corporate staff and Executives.

Governance is a Challenge

Thirty-six percent of respondents report there are no set policies or procedures for managing content in Office 365.

Change is a Challenge

Fifty-five percent of our respondents agree that getting users to manage and share their content in Office 365 and no place else is their biggest on-going issue.

Outlook as a Front-end

Sixty-four percent of respondents access content in Office 365 via Outlook.

People Like It

Forty-four percent report their users like it.

FREE REPORT: Learn how to solve the challenges of Office 365 and SharePoint

Office 365 has quickly become the platform of choice for many in the AIIM Community. It's no wonder as this widely used technology offers many advantages for managing information. But, as with any technology or application, it also comes with it's share of challenges.

Download the *FREE Report* for a closer look at managing information with Office 365.

http://info.aiim.org/connecting-and-optimizing-office-365

HOW TO REACH ME

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- @BobLarrivee

Chris Sargent, Ecosystems Program Manager – Microsoft, OpenText

Extend Your Enterprise Content Management / Content Services Strategy with Office 365

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Integrated, Efficient, Effective

SAP S/4 HANA | SAP SuccessFactors | Microsoft | ORACLE | salesforce

Business Back-office

- ERP
- CRM
- BPM/Case Management
- LOB Applications
- Core Data
- ECM/RM/Compliance

Productivity

- Content Creation
- Groups / Teams
- Collaboration / Sharing
- Communication
- Mobility
- Basic Retention
- Discovery / Analytics

opentext™ | Extended ECM Platform

Intro

Hydro Tasmania

- Australia's largest generator of renewable energy
- 1,200 employees
- Manage operations across dozens of hydro-electric power stations, gas power plants and wind farms
- Core commitment to safety and sustainability
- Myriad local, regional and national regulatory requirements
- Rick Quarmby – Principal Knowledge Management Advisor to HT CIO

Background

- Large investment in Microsoft productivity tools
- No ‘official’ ERP or ECM
- A “scattered source of truth” problem
  - Affected safety, discovery, audit, etc.
- Content inefficiencies, creating hazardous environment
- Information not connected to business processes
- No ability to maximize Office 365 investment
  - Multiple versions, no single source of truth
  - Substantially limited remote users

Solution

Hydro Tasmania

SAP®

Metadata/Context

opentext™

Business Workspace

DATA

PEOPLE

CONTENT

TASKS

Business Workspace

DATA

PEOPLE

CONTENT

TASKS

Collaboration/Content

Office 365

SharePoint

Holistic ECM Strategy

Benefits

- Content now connected to Process
  - Affects safety, compliance, discovery, audit, etc.
- Enhanced Mobility and Document Access
- Single Versions of Docs
  - ++ Compliance, – storage costs
- Productivity Gains
  - Toss out the swivel chair
  - HUGE time savings – 25,000 hours/year
- Maximize Microsoft investment – “I know where to go, the information is consistent, and I can share and use it.” – *Rick Quarmby*

Quote

"If I'm in [OpenText] Content Server* I can work in SAP, and if I'm in SAP I can work in Content Server. And the other bridge* is to SharePoint – we have a BIG investment in SharePoint. So, we've got the trilogy – SharePoint's the outer limits, Content Server is the source of truth, and SAP is the source of process."

- *Rick Quarmby, Principal Knowledge Management Advisor, Hydro Tasmania*

* These technologies are part of the Extended ECM solution.

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DIGITAL BUSINESS

DIGITAL WORKPLACE

CONNECTS CONTENT TO YOUR DIGITAL BUSINESS

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EIM
Cloud and
On-Premises

#1 ECM

#1 Business Network

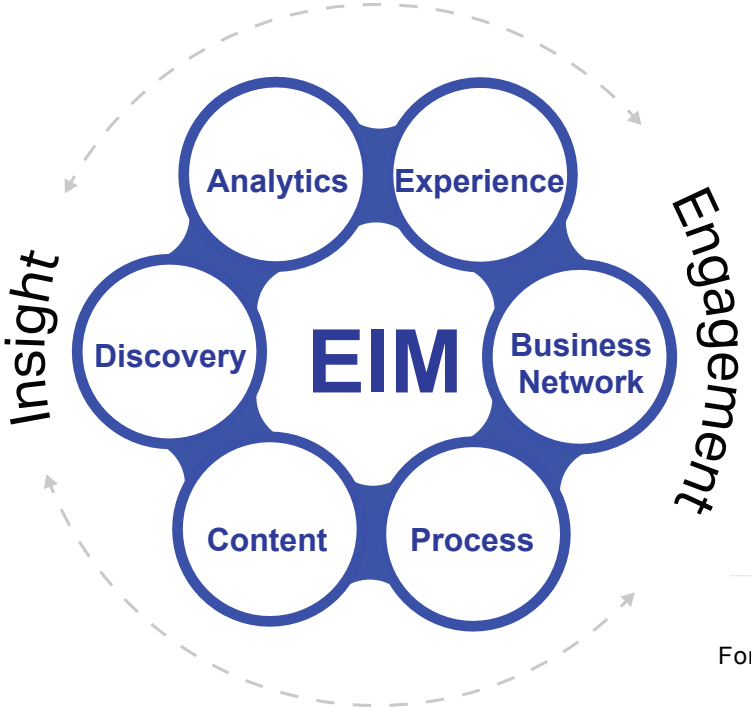
#1 CCM

#1 DAM

Professional Services

Managed Services

1,500+ SKUs



12,000 Employees

25 years of innovation

$2.3B FY17 Revenue

1,200 Partners

100,000+ Customers

90% of Fortune 1000 companies

On-Premises

Hybrid

Cloud

HOW TO REACH ME

- Chris Sargent, OpenText
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- http://www.linkedin.com/in/chrissargent9110
- **Visit** the OpenText booth at the upcoming AIIM Conference
  - San Antonio, TX – April 10-13

Dave Craig, Search/Content Architect, Devon Energy Corp

aiim

Moving Your Org to O365

Leave your old problems behind and successfully leverage the new features in O365

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About Me

- SharePoint Dev & Search Architect
  - 5 years
- Overall Content Solutions Architect
  - 2 years
- Relatively versed in E&P lifecycles
  - Legal, Land, EHS, Drilling, Completions, Production
- Supporting 5k plus users in the Cloud
- That's my dog

Preparing Users for the Change

- Enlist support from Leadership
- Identify the right O365 tools for different user needs
- Look for opportunities to retire old habits and outdated ways of working in favor of new OoB features and tools
- Go “Modern”
- Self-service and auto-governance

Get Your Leadership On Board

- Lead by example
- Express enthusiasm for change
- Leaders have a way of subtly letting people know when compliance is not optional

Use the Right Tool/ Feature

Every department does not need *every* tool

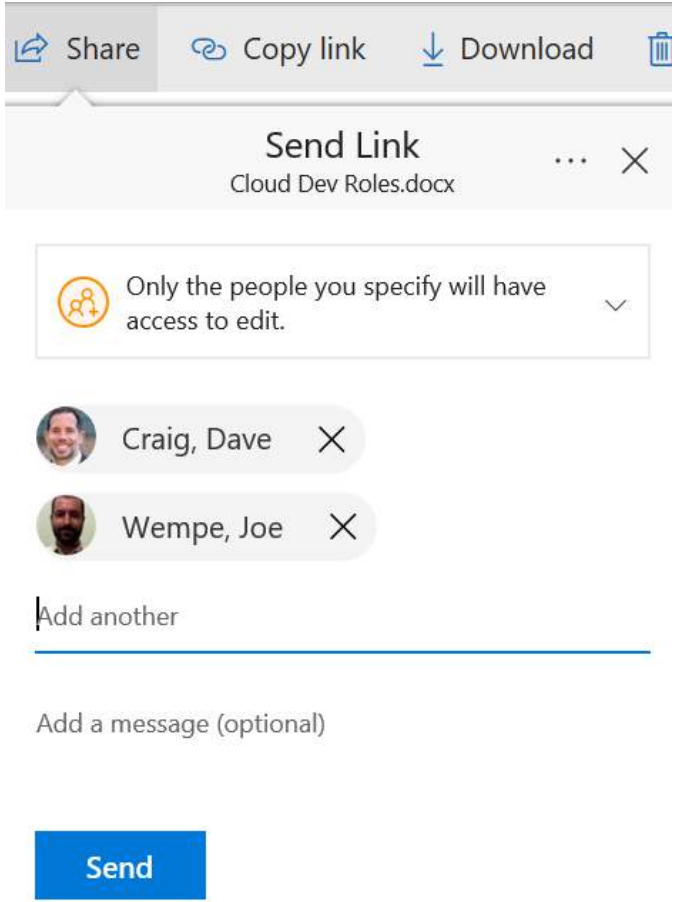
- ❑ Yammer
- ❑ Comm. Site
- ❑ Group Site
- ❑ MS Teams

Get creative, but use the tools as intended

Educate users to be responsible for their content and share with the right groups

Guide choices based on

who is *publishing* the content vs. who is *consuming* it



Use the Right Tool/Feature

Review the public roadmap *regularly*

https://products.office.com/en-US/business/office-365-roadmap

Launched
166
Fully released updates that are now generally available for applicable customers

Rolling Out
46
Updates that are beginning to roll-out and are not yet available to all applicable customers

In development
196
Updates that are currently in development and testing

Cancelled
1
Previously planned updates that are no longer being developed or are indefinitely delayed

Retiring Old Habits / Stay Ahead of the Curve

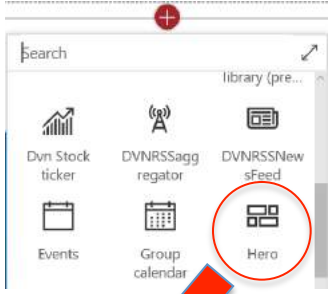
Why can't we just do things the way we've always done them?

- Fix your problems, don't migrate them
  - Budget resources for resolving technical debt
  - Don't bring it with you
- O365 is an evolving ecosystem
  - *ANY* solution you build to subvert OoB features becomes a constant maintenance burden
  - New tools and features that work across the entire suite are being released and updated by MSFT all the time and they are *supported.* Don't get locked into your solution.
  - Again, refer to the public roadmap regularly

Go “Modern”

Classic pages & views may be around for awhile...

...but Modern views get most of the updates and already have valuable benefits



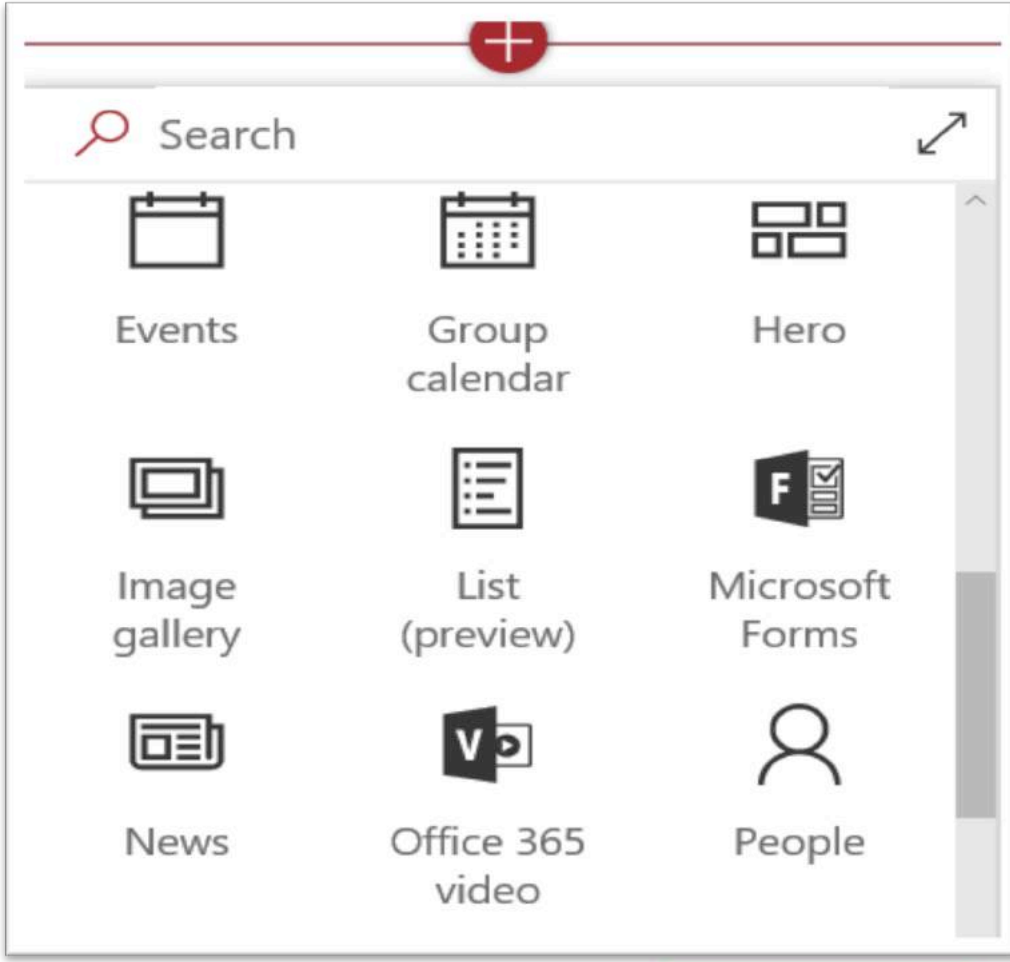
Go “Modern”

Presents new ways of working to users...

- Live Panes
- Flow
- PowerApps
- Page edit "Toolbox"

...and new challenges to devs and admins

- SharePoint Dev Framework (SPFx)
- SPFx extensions
- CICD through VSTS



Self-service and Auto-governance

- Using the Content Type Hub allows group owners to maintain consistent content definitions across sites
- Aim to have a direct hand only in sites/libraries with high enterprise value
- Good mgmt. of Content Types and thoughtful planning of Search properties leads to a useful search experience

Remember: Tools can (and should) be in your self-serve model also

PowerApps

Flow

Other Key Prep Items / Identify the Workload

- Custom Solutions that need to be updated or new solutions that need to be developed
  - Be aware of the all new (kind of) dev tools
- Replace in-house solutions with OoB alternatives
  - Flow, PowerApps, PowerBI, Teams, Communication Sites
- Opportunities to consolidate
- Identify high value Enterprise content/repos

HOW TO REACH ME

- Dave Craig, Devon Energy
- Dave.Craig@dvn.com
- Email Subject: O365 Help

Sjoerd Alkema,
Head of Professional Services, Xillio

Easy Migration to Office 365

A proven as a service approach

#aiimtribe

Introduction Sjoerd Alkema

- **12+ years content management consultancy experience** (Unisys, Capgemini, and Xillio)
- **Now heading Xillio Professional Services,** delivering **Migrations as a Service** and **Integration projects**

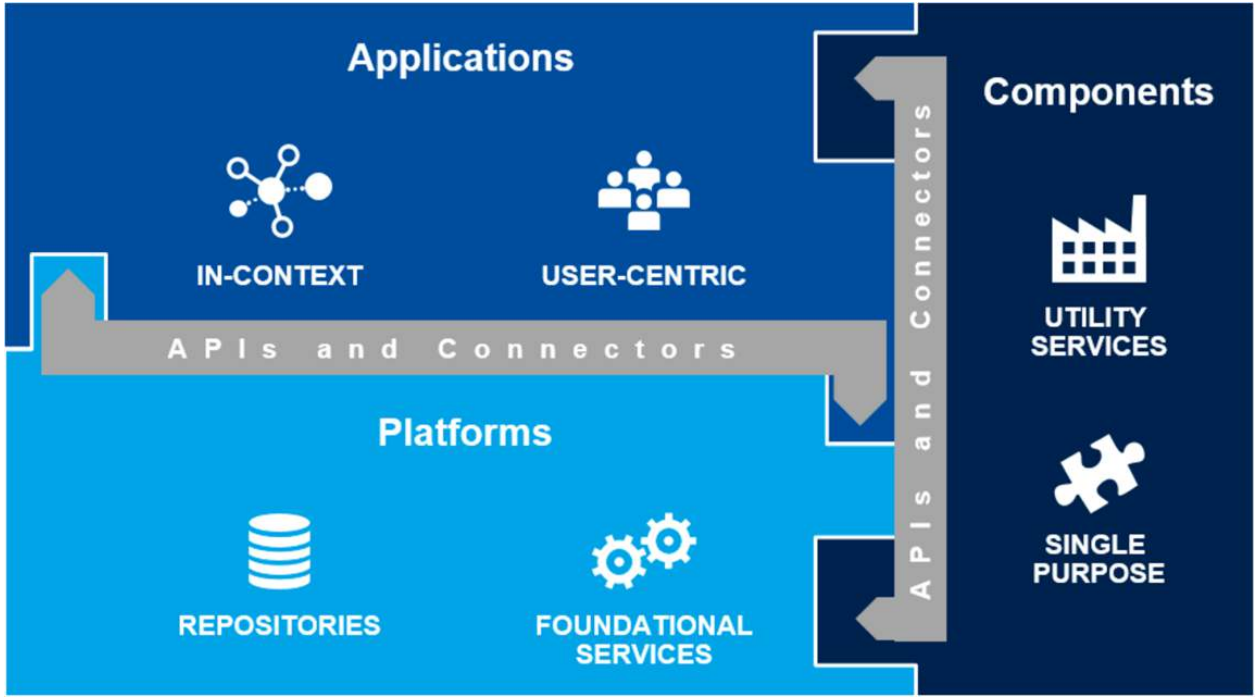
Agenda

- Market dynamics
- Market challenges
- Migration as a Service
- Reference projects
- Tips and tricks

Market dynamics

Gartner: EFSS quadrant

Market dynamics



Gartner: introducing content services

Challenge: the road to the **lean** and **agile** content landscape

Challenge: content migrations…

Why? Because they are difficult

- Organizations are (finally) on mass moving away from their file shares – no exeption a big mess
- Early ECM adopters now have legacy ECM – challenge to connect
- Where do I start?
- Choices: lift and shift or do more? Yourself or hire a pro?
- Every business has special needs and requirements
- Labour and technology intensive.

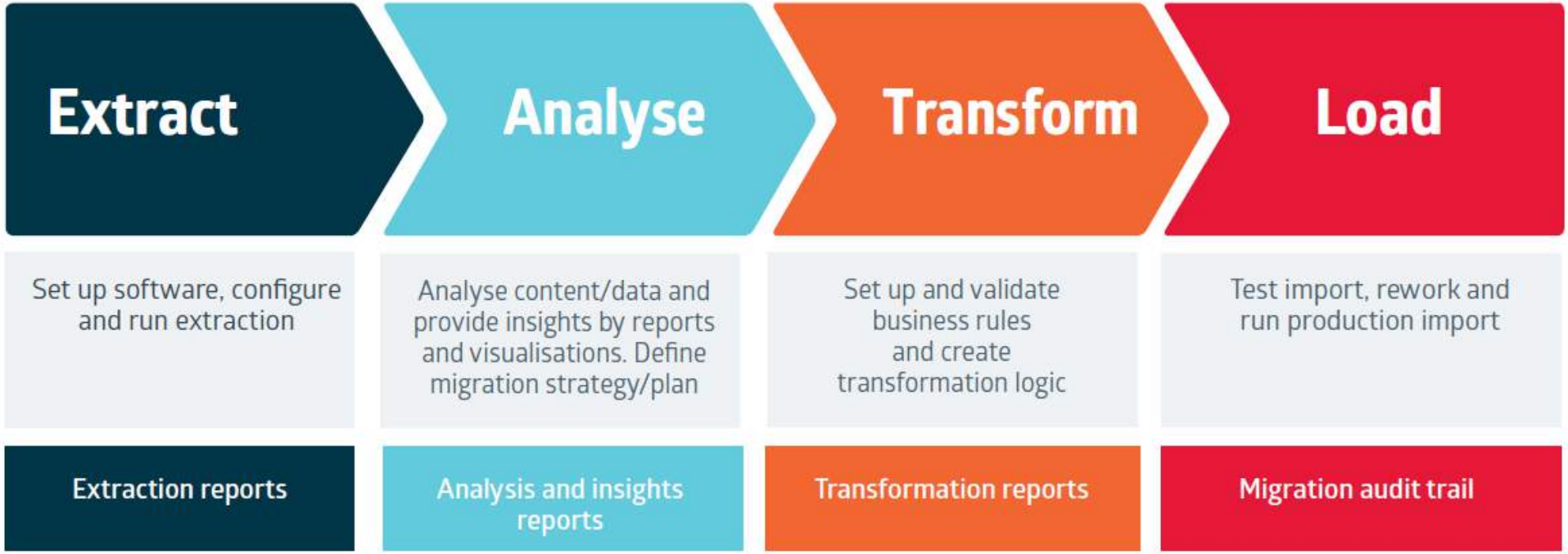
That’s why we deliver migrations as a service

- White glove
- Fixed price
- Guaranteed outcome

What’s in it

- No lift and shift… We **always add value**
- Business rules to apply **selection and mapping**
- All major **WCM - ECM systems and file shares** supported
- **Compliant** – extensive reporting
- **Guaranteed outcome and fixed price** – we only need the amount of TB

Migration as a Service Execution



PWN Drinking water company

- Analysis file shares for insights and business rules
- Generic business rules and specific
- Per department approach (2 week per department)
- Key word extraction and document type classification
- Restructuring based on file share
- Delta migrations

CASE STUDY PWN

PWN EXCHANGES MANUAL MIGRATION OF FILE SHARE TO SHAREPOINT FOR XILLIO SOFTWARE

PROBLEM

The transition to SharePoint and its adoption by staff was minimal. PWN sought a method to transfer documents from network shares to E-Plaza in a qualitative and efficient manner.

SOLUTION

PWN is a drinking water company in the province of North Holland, the Netherlands. The company, with more than 600 full-time staff (FTEs), produces drinking water for nearly 800,000 households. In 2014, PWN introduced a new knowledge portal and collaboration environment, based on SharePoint. The goal was to say farewell to the inefficient way it had of working on file shares.

Adoption SharePoint

'After a training and extensive support for users by so-called 'champions,' we started to manually transfer all the content of our file shares

US Healthcare consulting company

- Start with analysis Alfresco data for selection rules
- Re-creation of site – folder structure based on the structure in Alfresco
- Re-creation of metadata to columns at point of migration
- Per site approach
- Completely done remotely

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Case Study

Migration-as-a-Service Alfresco to SharePoint Online

Issue description

lack of internal resources dedicated to maintaining the Al fresco system in a full capacity to make it work for staff, made US-based healthcare consulting firm decide to phase out Alfresco. They needed a head-on approach to migrate from Alfresco to Sharepoint Online. Basically they wanted to copy the Alfresco structure to Sharepoint Online with as minimal manual work possible. The firm chose Xillio's migration as a service offer.

Numbers

- Over 600 sites with document libraries
- 1 site with a data list
- Thousands of duplicates, which where made visible in various of reports
- 2 concurrent migration streets

Technical solution

Due the volume of the sites an iterative approach was taken which means the migration was done in groups of sites.
This way there was minimum content freeze on a particular site.
After a few successful migrations, the first migration street was duplicated to speed up process. This basically resulted in a 100% performance improvement.

After the one-on-one migration, an additional project was set up to clean up the thousands of duplicate documents within SharePoint.
Because of the strict time constraint this analysis phase was done after the migration, whereas this normally is done before the actual migration

Results and Value for the Client

- Automatic provisioning of Sharepoint structure, no need to setup sites, libraries and metadata manually

Tips and Tricks Migration to Office365

- Use **content analysis** to determine your migration strategy – it will give you even more than just that.
- Picture it as an **opportunity to improve**! Not just necessary evil…
- Don’t just do a lift and shift, a **big risk for user adoption**.
- **Show impact** of business rules to refine iteratively with client.
- Check the **performance** in first phase as input for your migration planning.
- Create the business rules **generic first** and deep dive per company entity for specifics.
- Consider **integration** to strategically enable migrations of large legacy systems.
- **Involve users** from the very start of the process and in every step of the way.

Who we are and what we do

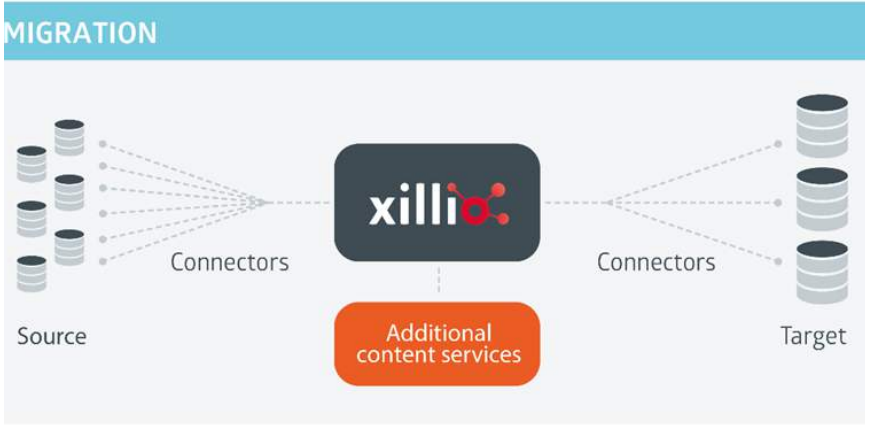
Help our customers to create and maintain a **lean, clean,** and **agile** content landscape through excellent **understanding** of their content

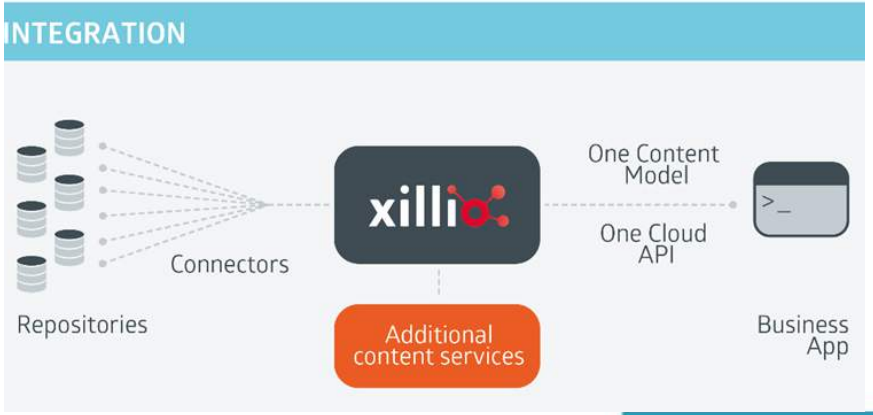
xillio

Unlock the value of your content

How we do this

- Migration
- Integration





HOW TO REACH ME

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- sjoerd.alkema@xillio.com
- https://www.linkedin.com/in/sjoerdalkema/

Reminder…

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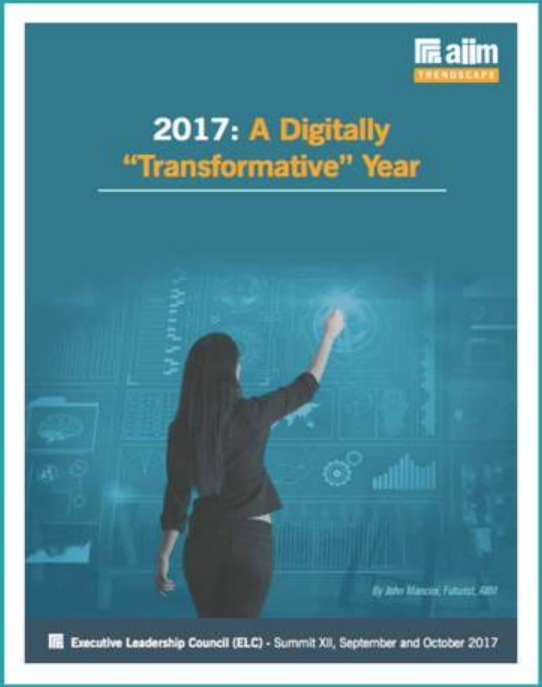

Intelligent Information Management - The Full Story

3 FREE Resources detailing the full journey that's brought us to IIM.

Download at AIIM.org/IIM

Jonathan Maley, ECM Consultant, ImageTech Systems Inc.

Workflow and Content Automation (WCA) for O365

AIIM Virtual Event: Office 365 and SharePoint – Improving How Information Is Captured, Processed, and Managed

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The WCA Market – A Few Drivers

- Must Transform Slow, Error-Prone Operations
- Convert Analog Processes to Digital Processes
- Get Away from Paper-Based (& Email) Steps
- Modernize rigid legacy BPM software systems

WCA Solutions vs Traditional BPM

Item	Old Approach	WCA Approach
Architecture	Rigid and fixed	Dynamic and flexible
Developer Type	IT Programmer	Business Analyst
Development Approach	Complex Programming	Visual - Drag and drop metaphor
Payback	Months to Years	Weeks
Change Management	Hard to change once deployed	Easy to modify and update
Impact	Isolated	Expansive

Credit: Aragon Research WCA The Smart Way Forward 9/2016

Sessions | Nintex Workflow for Offi

Secure | https://ntxdemo8-5cc0a9212a8bb1.sharepoint.com/NintexWorkflowforOffice365/Launch.aspx?sessionId=14557024-6eaf-42f8-a6d0-3194337ed742&SPHostUrl=https%3a%2f%2fntxdemo8.sha...

Back to Workflow Gallery ▸ List workflow: New User Requests

Nintex Workflow for Office 365 | DESIGNER

Save | Publish | New | Open | Close | Import | Export | Settings | Variables | Store | Information | Feedback | Help

ACTIONS

Search...

- Action Set
- Conditional Branch
- Filter
- For Each
- Loop N Times
- Loop with Condition

Hawkeye
Integration
Libraries and Lists
Logic and Flow
Operations
Provisioning
Social

User Creation Stages

Create ...
Office 365 create user
Success? (N/Y)
Sequence
Sequence

Assign L...
Office 365 retrieve license plans
Get an Item from a Dictionary

Notify HR
Update HR Employee Onboarding List It...
Set Next State

Notify ...
Pause until Da
Send an Emai

Sessions | Nintex Workflow for Offi | Nintex Workflow - Ninte

Secure | https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000EJHPIUA5

AppExchange | Heroku Elements | LINK Marketplace | Salesforce

AppExchange
the Salesforce store

Search AppExchange

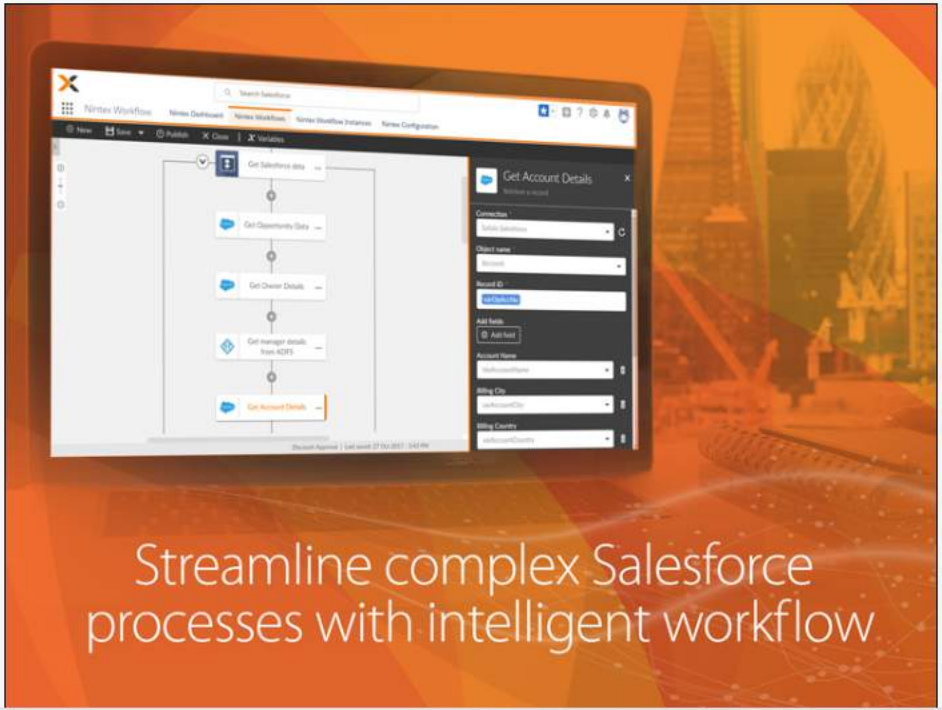
Log In

Home | Listings by Type | Product Collections | Industry Collections | Ohana

ALL APPS > SALES > PRODUCTIVITY | JUMP TO ▾

Nintex Workflow

By Nintex



Free

RATING	LISTED ON	LATEST RELEASE
★★★★★ (0)	11/5/2017	2/8/2018

CATEGORIES
Productivity

Automate, Analyze, and Optimize Sales and Service Processes without code

Accelerate sales and service metrics by streamlining complex processes within Salesforce, across orgs and business systems. All without leaving the familiarity of Salesforce, writing a single line of code, or relying on IT. As easy as "drag, drop, done."

Sessions | Nintex Workflow for Offi | Nintex Workflow - Ninte | Nintex Workflow Cloud

Secure | https://npn-033452.workflowcloud.com/dashboard#/designer/0f57f640-22fe-41b3-b956-fa0a1f7e4f55

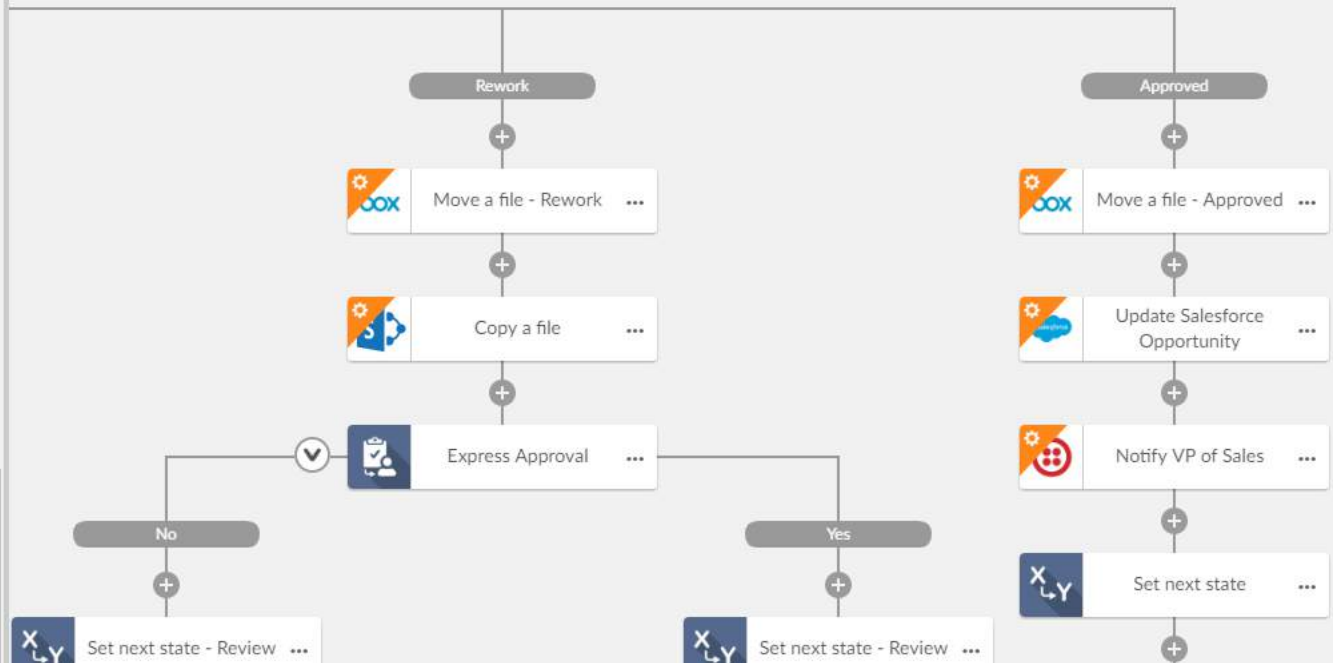
NINTEX

Dashboard | Designer | Settings | Jonathan | Feedback

New | Save | Publish | Close | Variables

Search

- Adobe Sign
- DocuSign
- Azure Active Directory
  - Get manager details
  - Get user details
  - Query users
- SharePoint Online
  - Add attachment to an item
  - Copy a file
  - Create an item
  - Delete an item
  - Query a list
  - Retrieve an item
  - Store a file



Sessions | Nintex Workflow for Offi | Nintex Workflow - Ninte | Nintex Workflow Cloud | Nintex App Studio

Secure | https://nme.nintex.com/CustomApp/Create#/theme

Nintex App Studio

Apps Settings Jonathan Maley

Save Draft Save & Build Close

General

Connections

Theme

Content

Theme

Add artwork

Upload .png files of the specified sizes to generate platform-required images. For best results, upload images with transparent backgrounds.

Upload

Nintex App Studio

PNG - 1300x1300

PNG - 200x200

PNG - 100x100

Nintex App Studio

PNG - 1205x310

Choose or create a color scheme

Select from the following options or create a custom color scheme.

Nintex App Studio

Email

Next

Profile

Create a profile to sign into your account

Summary: Workflow and Content Automation

- Workflow & Content Automation is a category
- Nintex is one product/solution in that category
- Forms, Workflow, Mobile, Analytics, & more
- Platform orientation, not point solutions
- Support for O365, SharePoint, Box, SFDC, etc.
- Enterprise-scalable, not just Personal or Team

HOW TO REACH ME

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- @askimagetech
- Nintex, Kofax, SharePoint, Office 365

Paul Willmott, Microsoft Global Alliance Manager, Repstor

Case Management in O365

Paul Willmott

Repstor – Microsoft Global Alliance Manager

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Repstor Ltd Background

- UK Headquartered company, founded 2012
- Customers Globally – 100 -> 25,000 users
- Management Team all previously held leadership positions UK ECM related companies
- 15+ Years working in Microsoft Focused Content Management Solutions
- Product suite developed to meet the needs of Information workers in Legal / Professional Services, Government and Regulated Industry on O365

Adding capability to the O365 platform – so it's not just moving Exchange to the Cloud

User productivity / efficiency

Broaden the User Experience/service Outlook centric users/Exploit more Platform components

Outlook as a way of working

Offline Working

Predictive filing

Meaningful reports

New /Additional Workloads

Flow/LogicApps/Powerapps External Collaboration

Add automation and process…

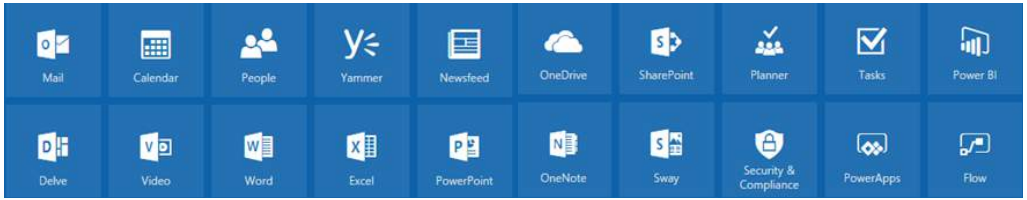
Rapid / no development deployment of SharePoint Workspaces

SAAS Model (Provider hosted Apps)

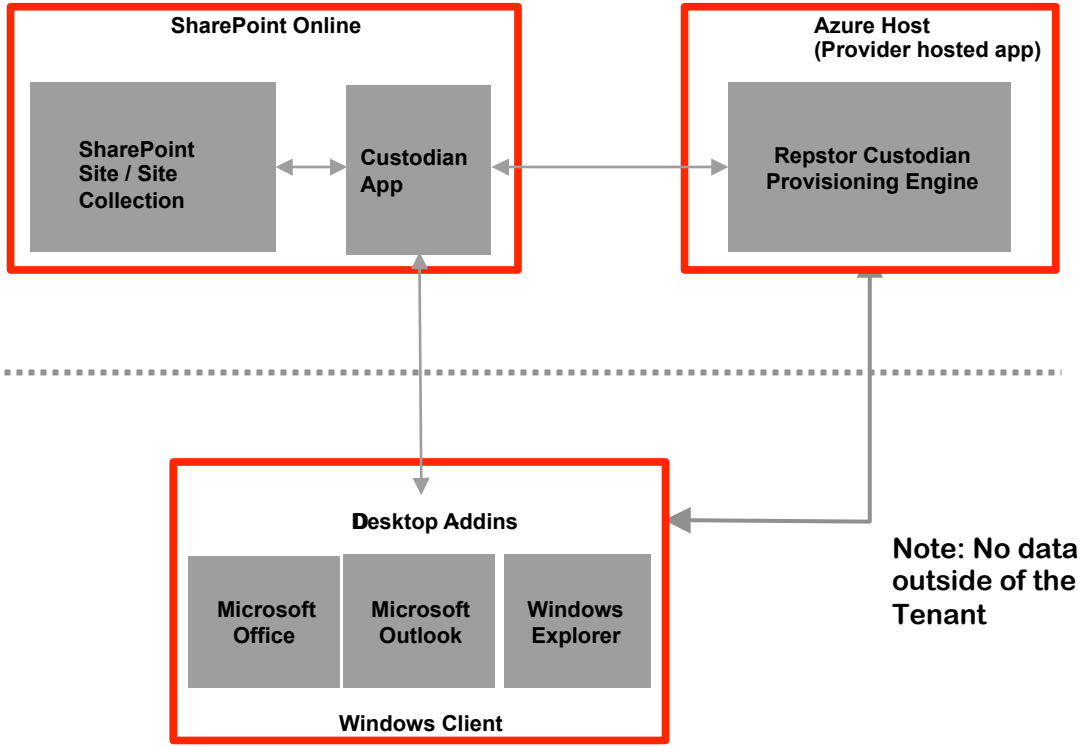
Document/Email Centric automation/workflow

Office 365

Take a great platform…



Repstor Custodian – High Level Architecture



Note: No data held outside of the O365 Tenant

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Eversheds Sutherland – Case Study

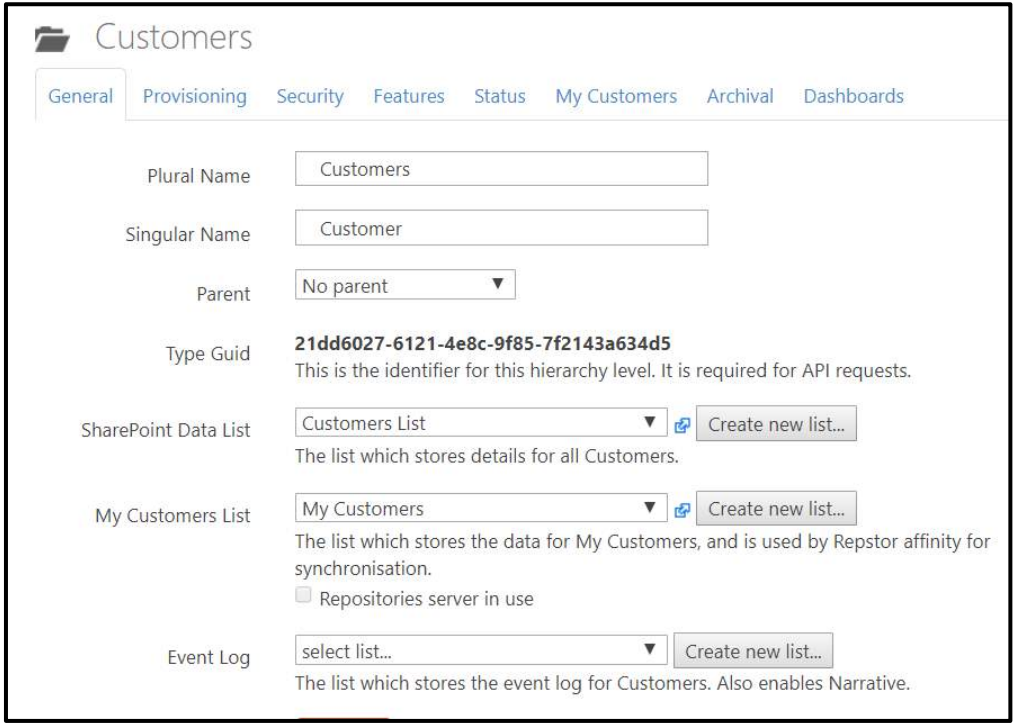
Client

- Global Top 40 Law Firm with Offices
- 69 offices in 29 countries
- Over 3000 Legal Professionals

Challenge

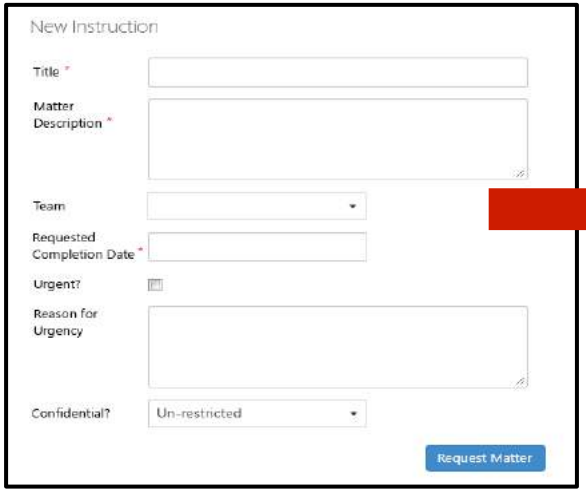
- Legacy Matter DMS very location specific.
- Poor support for collaboration / remote working / virtual teams
- Compliance
- Already invested in O365
- Keen to deploy O365 including SharePoint but lack of Matter – Centricity a challenge

Eversheds Admin Console

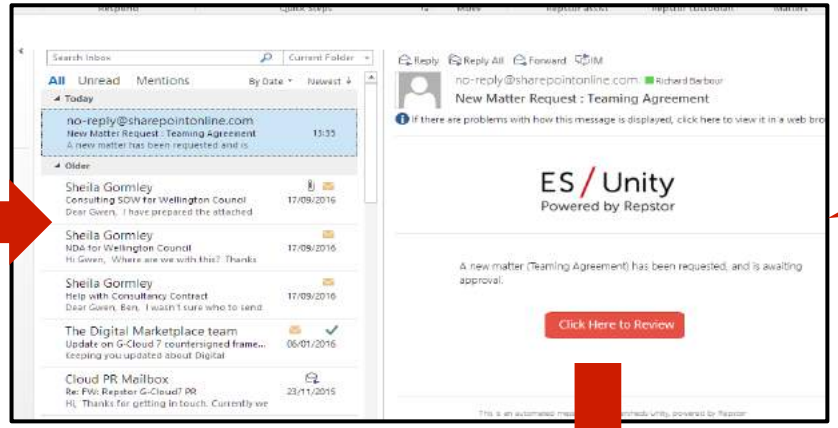


- Each level of hierarchy can have all of the various facets configured
  - What and where to provision
  - Naming Conventions
  - Templates to use
  - Security
  - Features to be applied (e.g. can cases be linked)
  - Status's – which status's apply, which status's can be selected, what metadata must be provided when moving
  - Archive settings
  - Dashboards to be made available
    - E.g., matters overdue/Matters due for review

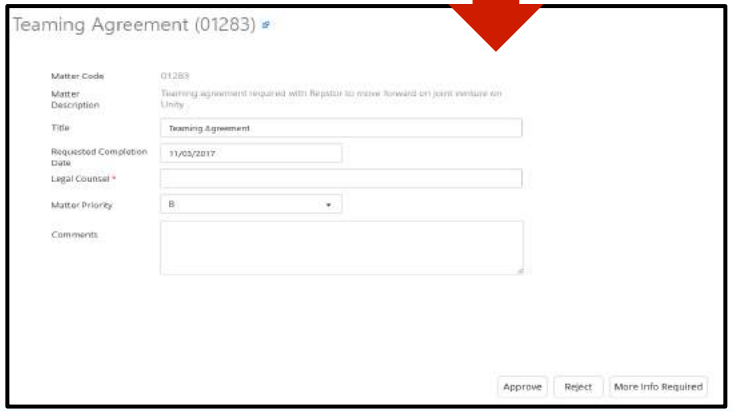
Eversheds Requestor Process



Service users can complete a simple online form to engage with the legal team



Legal team notified to review in Outlook



Matter is classified and lawyer is assigned

Lawyer's 'workstation'

Send and file emails with one action and even track changes to attachments

Create new documents form scratch or based on precedent templates

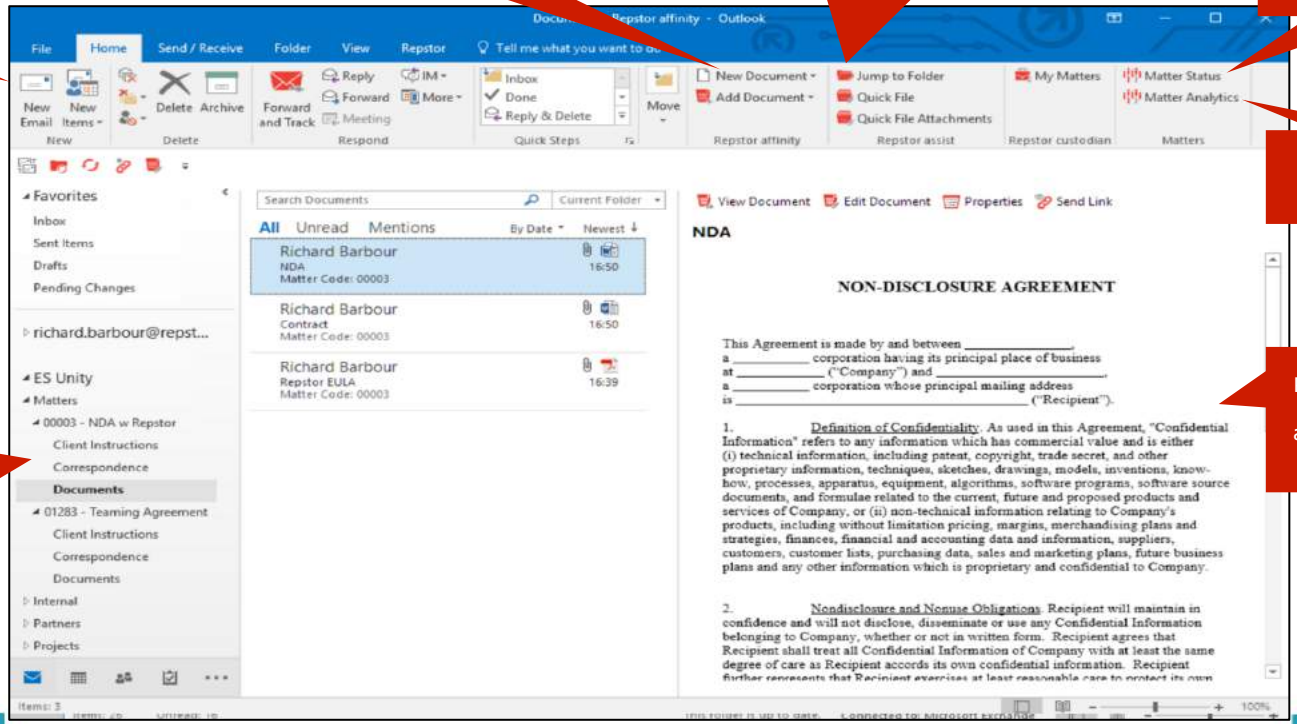
File emails and documents to matters at the touch of a button with intelligent filing assistant

Update matter information, progress and status keeping colleagues and business users updated

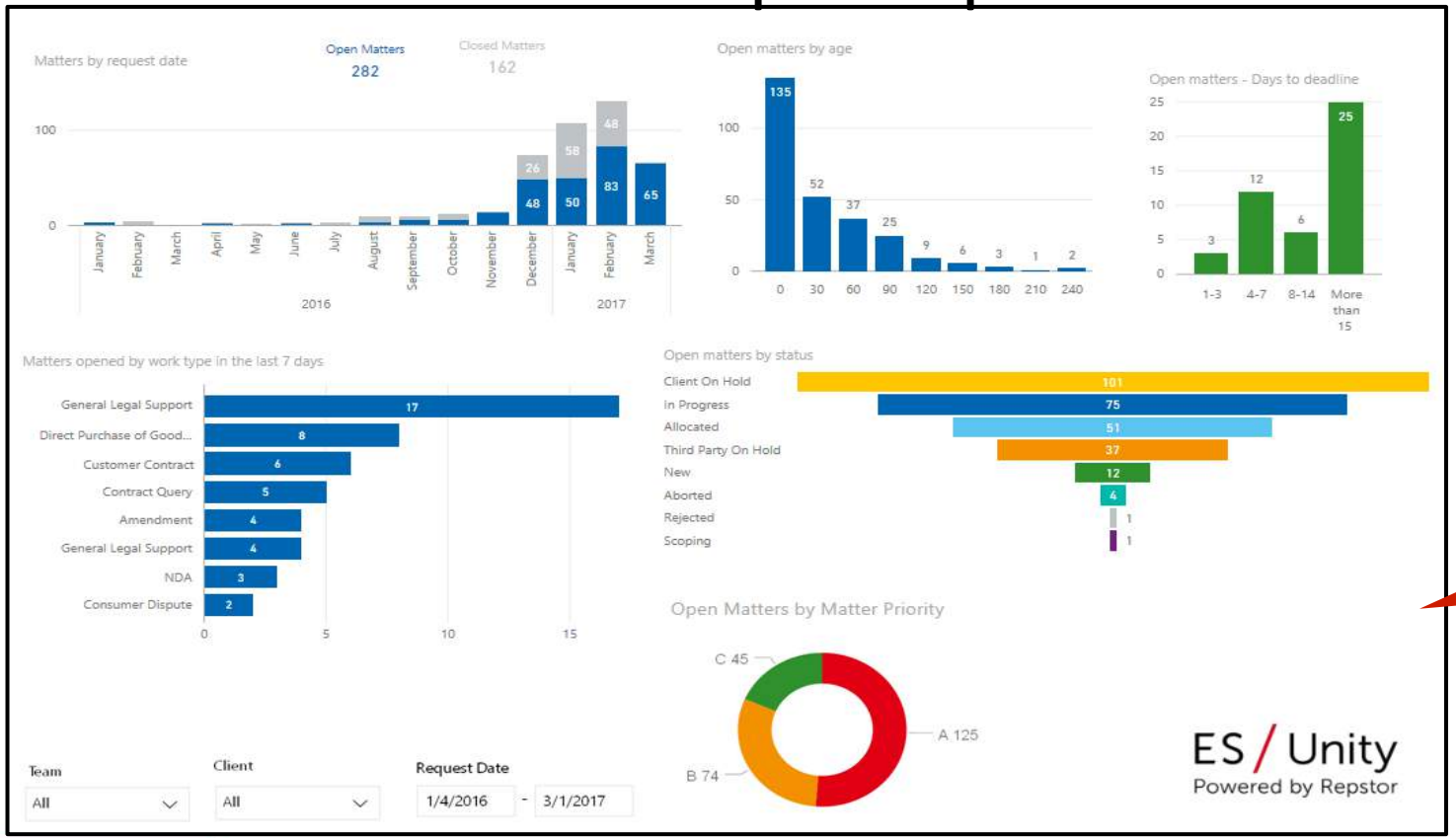
Access data rich reports and management information on matters

Access matter documents and emails stored in ES/ Unity without ever leaving Outlook

Preview and open matter documents in Outlook, and compare and restore versions



Sample Reports



All matter information and activity is fed into rich, interactive reports

Eversheds Sutherland– Case Study

Client

Global Top 40 Law Firm with Offices

69 offices in 29 countries

Over 3000 Legal Professionals

Challenge

Legacy Matter DMS very location specific.

Poor support for collaboration / remote working / virtual teams

Compliance

Keen to deploy O365 including SharePoint but lack of Matter – Centricity a challenge

Solution

Repstor Custodian for Legal on O365 for Matter Centric Collaboration, email and DMS.

Ability to connect to legacy platform via affinity

2 Pilot areas live

Full rollout planned by summer 2018

Products: Custodian, affinity, assist, drive, mobile

Benefits

Legacy and new matters accessible side by side through Custodian / affinity

Increased Productivity / Ease of use

Better compliance (users not working around non-performant systems)

Platform capabilities seen as a differentiator Versus firms using traditional DMS going forward

"The usability alone brings significant benefits. Just freeing up an hour of a fee-earner's time from hunting down the latest documents is hugely transformational to productivity." **Barry Rodick, Ignite Team Leader**

HOW TO REACH ME

- Paul Willmott, Repstor
- paul.willmott@repstor.com
- +44 (0) 771 535 6655

Rob Bogue, President & CEO, Thor Projects LLC

Information Architecture in SharePoint and Office 365

Robert L Bogue
http://www.thorprojects.com/blog
Rob.Bogue@ThorProjects.com

The Problem

Containers

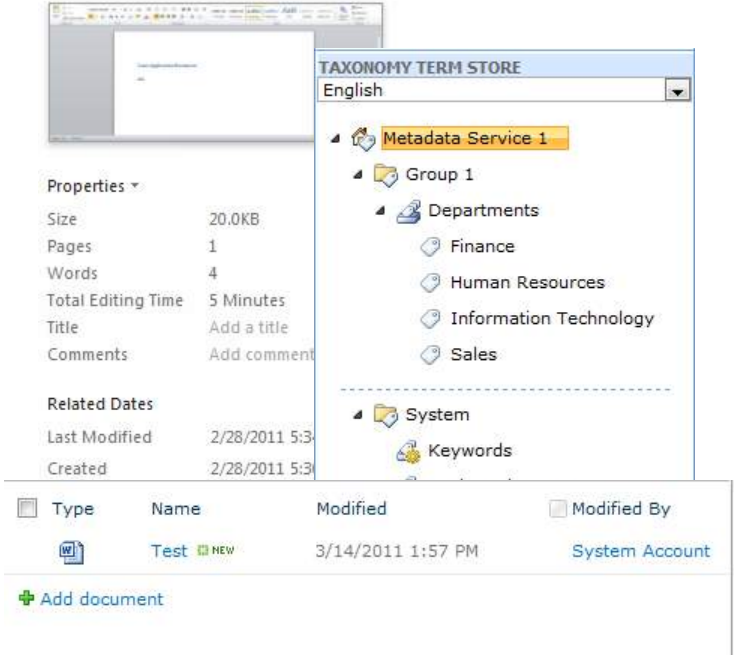
Web Application
Content Database
Site Collection
Site
App

No, You Can’t Make Them Enter Metadata

- Executive Mandate
- Manager Mandate
- Employee Games

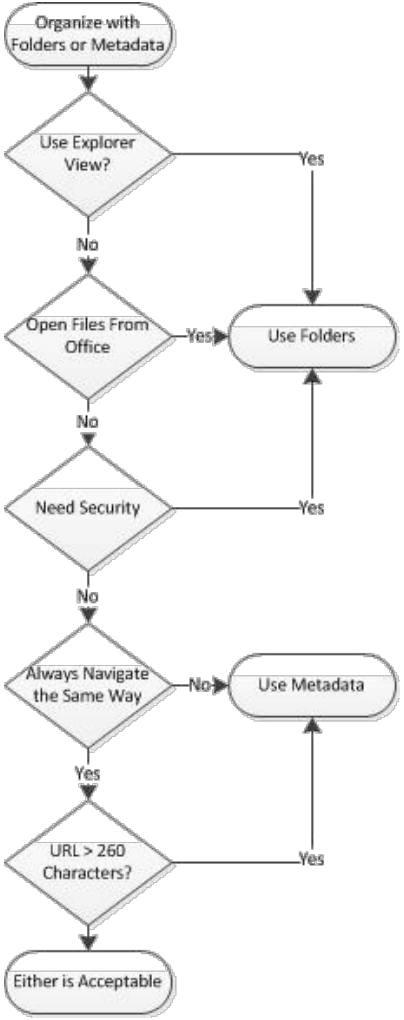
Types of Metadata

- Intrinsic
  - File Size
  - Item Type
- Derived
  - Created By
  - Created Date
  - Modified By
  - Modified Date
- Declared
  - List/Library Fields
  - Terms
  - Document Properties



Folders Versus Metadata

- SharePoint has the capability to transform folders (location) and metadata back and forth.
- Use folders for security and familiarity.
- Use metadata for flexibility.



Columns and Site Columns

- Site Columns are site collection scoped
- Columns are list or library scoped
- Use site columns to ensure consistency

Content Types Define

- Columns
- Document Template
- Custom Forms
- Workflows
- Information Management Policies
  - Retention
  - Auditing
  - Barcodes
  - Labels

Content Type Hub

- Syndicates content types
- Bridges from one site collection to every site collection in SharePoint

Creator Versus Consumer

- Creators are interested in EASE to STORE.
- Consumers are interested in EASE to RETREIVE.
- Departmental taxonomies focus on EASE to STORE.
- Functional taxonomies focus on EASE to RETREIVE.

Card Sorting

- The most effective exercise for creating a taxonomy
- Often need to nudge/push out of current thinking
- Need clarity of audience and purpose

Office 365 SharePoint

Robert Bogue

publisher

Everything People Conversations Videos

Preference for results in English

Result type

PDF

Author

Robert Bogue

Don

Alfred John Church and Ri...

Anne Warner

D. Nichol Smith

SHOW MORE

Modified date

One Year Ago Today

All

Dewey Decimal

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Thank You

Robert L Bogue
http://www.thorprojects.com/blog
Rob.Bogue@ThorProjects.com

Looking for your next step?

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Expires March 14, 2018

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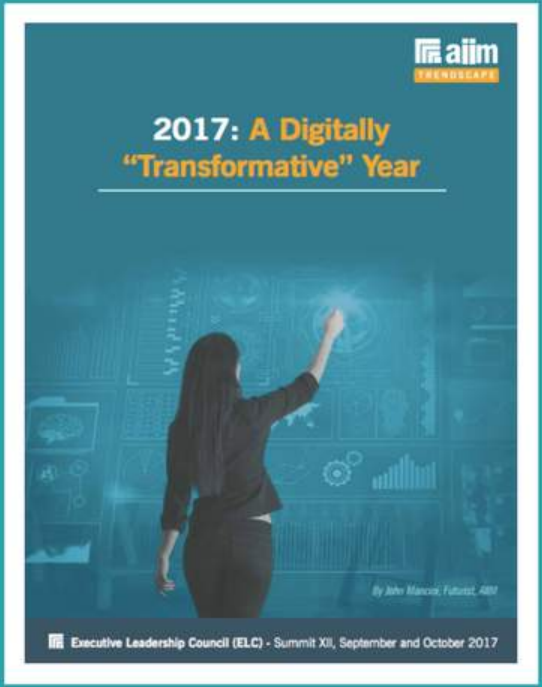
WE KNOW YOU'RE HUNGRY FOR KNOWLEDGE...

Please be patient and we'll be back in 15 minutes.

We'll start back at
1:10 pm EST / 10:10 am PST
(In Europe: 6:10 pm GMT / 7:10 pm CET)



Intelligent Information Management - The Full Story

3 FREE Resources detailing the full journey that's brought us to IIM.

Download at AIIM.org/IIM

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- Take our **Survey** – we value your feedback on how we did today. *(click the widget to open)*

Janice Adshead, Deputy Clerk, Records and Information Services, City of Brampton

The City of Brampton

Enhances Records Compliance and Content Governance in the Cloud

BRAMPTON
Flower City
brampton.ca

#aiimtribe

City of Brampton

Information Management

BRiMS
Brampton Records and Information Management System

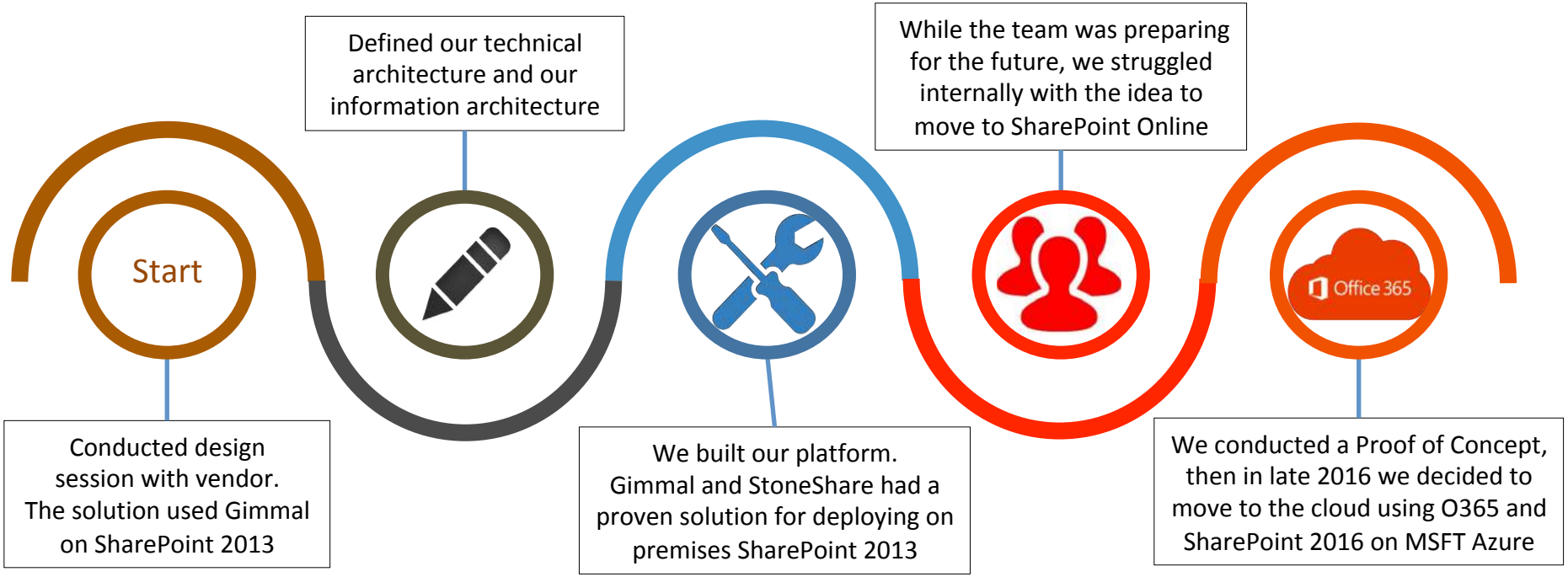
Information Technology

SharePoint

Office 365

Microsoft Azure

Our Journey


Start
Defined our technical architecture and our information architecture
While the team was preparing for the future, we struggled internally with the idea to move to SharePoint Online
Office 365
Conducted design session with vendor. The solution used Gimmal on SharePoint 2013
We built our platform. Gimmal and StoneShare had a proven solution for deploying on premises SharePoint 2013
We conducted a Proof of Concept, then in late 2016 we decided to move to the cloud using O365 and SharePoint 2016 on MSFT Azure

What Technology is Behind BRiMS ?

BRIMS is comprised of multiple tools and applications including:

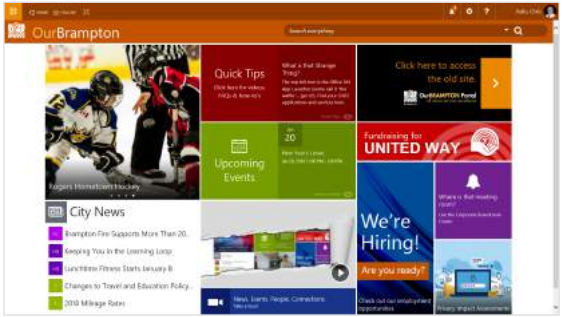
- Office 365 (SharePoint Online)
- SharePoint 2016 on Microsoft Azure
- Gimmal (Recordkeeping Tool) on Microsoft Azure
- Harmon.ie (Email Integration Tool)
- ShareGate (Compliance and Reporting Tool)

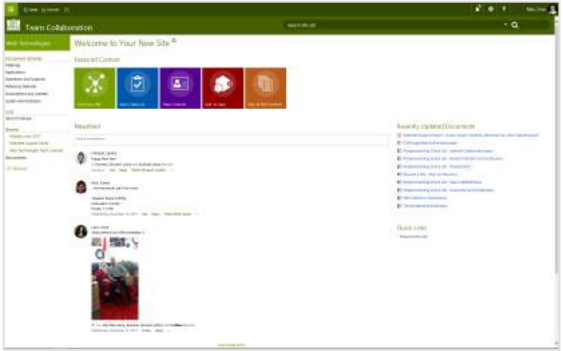
The migration of information from Shared Drives and SP2007 to BRIMS required a few other tools to be used as well:

- ShareGate (Migration Tool)
- LinkFixer (Identifies and fixes links that are broken during migration)

Replacing SharePoint 2007 with SharePoint Online

- Linear approach over hierarchal
- Standardized site design(s) – Team Sites, Community Sites (Corporate, Public), External Collaboration Sites, Project Sites
- Selecting standardized features to include on sites – Newsfeed, Calendars, etc.
- Determine Corporate Public folders for information that needs to be shared Corporately
- Global Branding and Navigation for consistency site-wide
- Introduction of a new Corporate Intranet site
- Service oriented content approach





Preparing for the Roll-Out: Defining the Information Architecture

We started defining the Information Architecture prior to publishing the RFP

We used our Records Retention By-Law as the backbone of the IA

We identified commonalities across departments, and used that to determine common libraries (folders)

We built the IA according to Brampton's needs

Our Successes

Engaged Project Sponsors

- City Clerk
- Chief Information Officer

2016- 2018 Strategic Plan

- Line item for Corporate Information Management

Investment in Change Management

- Technology Marketplace
- O365 Buzz Sessions
- 1:1 & Departmental Training
- Open Houses

A Collaborative Team Approach

- Project Sponsors
- Information Management Project Team
- Information Technology Team
- Strategic Communications
- System Integration Specialists/ Vendors
  - Microsoft
  - Gimmal
  - StoneShare
  - Mohawk College
- Internal Business Partners

Lessons Learned Along the Way

Get support from the top

Trust each other

Keep timelines tight for migration

Find project champions early

Be available to educate and support (and commiserate as needed)

Communicate, communicate, communicate!

HOW TO REACH ME

Janice Adshead

Deputy Clerk, Records and Information Management Services

City of Brampton

janice.adshead@brampton.ca

Rob Bogue, President & CEO, Thor Projects LLC

Engaging Users

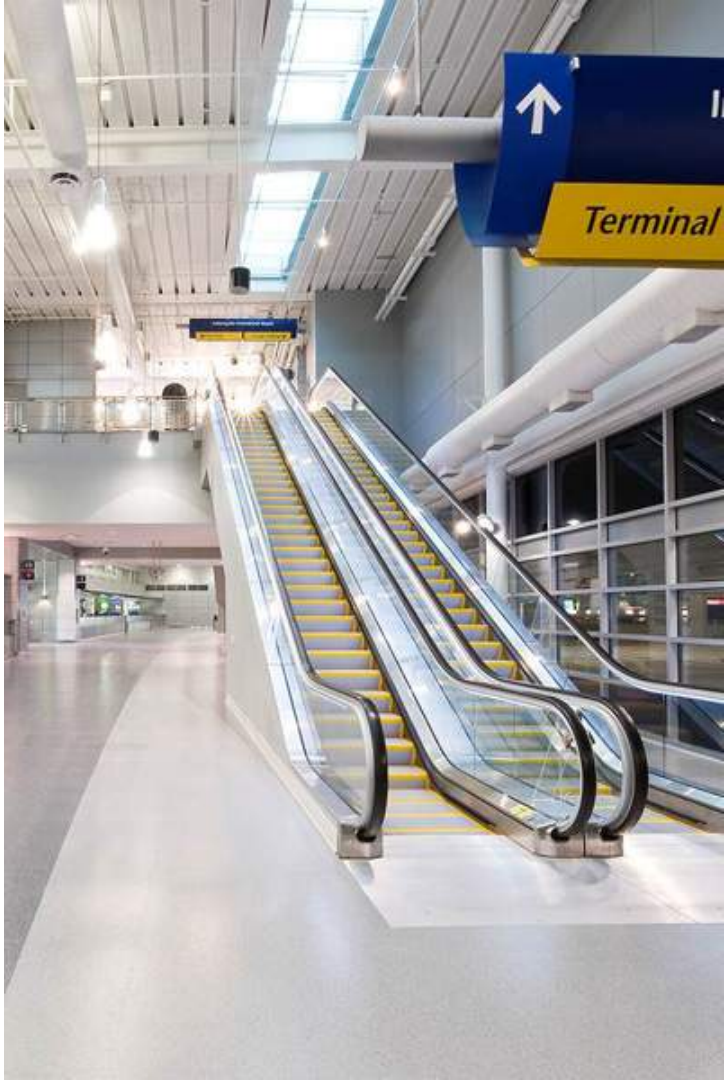
Robert L. Bogue
President & CEO
Thor Projects LLC
www.ThorProjects.com

It’s Not About the Technology

Relative advantage
Compatibility
Apparent Simplicity
Trialability
Observability
Adoption

Wayfinding

- First used by Kevin Lynch in 1960 to describe movement in cities
- Includes tools that users use to orient themselves
  - Maps and signs (Directions)
  - Landmarks (Ever-present reference points)
  - Paths (Channels of movement)
  - Edges (Barriers)
  - Districts (Major areas)
  - Nodes (Intersections)



Handwashing Compliance Rates

- Acute Care (Hospitals)
  - Worldwide ~20%
  - US ~50%-80%

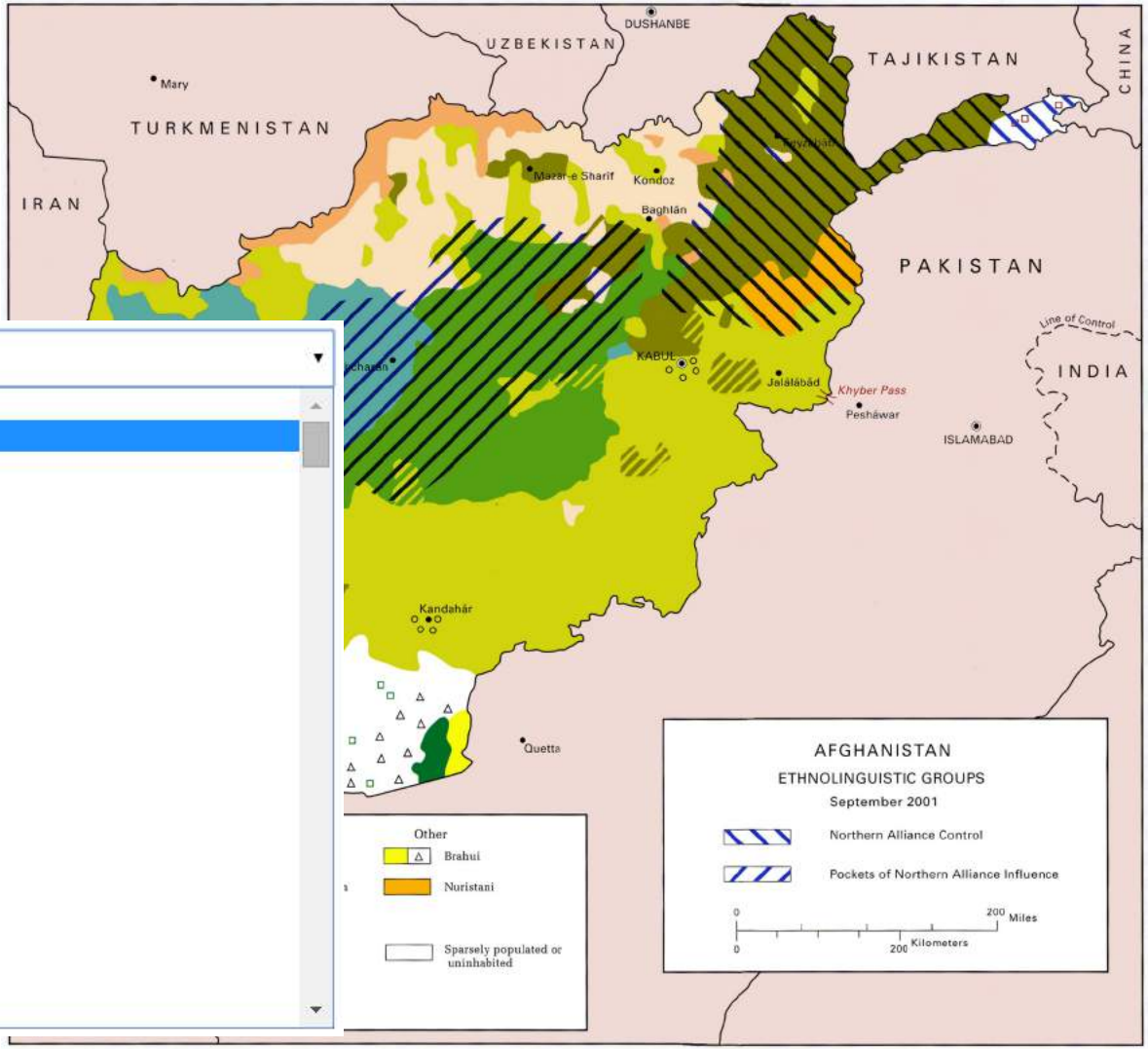
The Afghanistan Effect

Country*

Afghanistan

-- Please Select --
Afghanistan
Aland Islands
Albania
Algeria
American Samoa
Andorra
Angola
Anguilla
Antarctica
Antigua and Barbuda
Argentina
Armenia
Aruba
Australia
Austria
Azerbaijan
Bahamas
Bahrain
Bangladesh

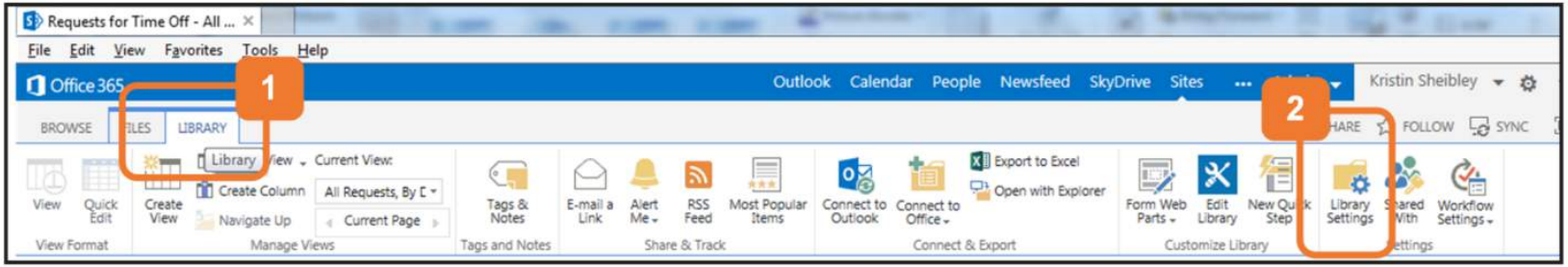
or Contact



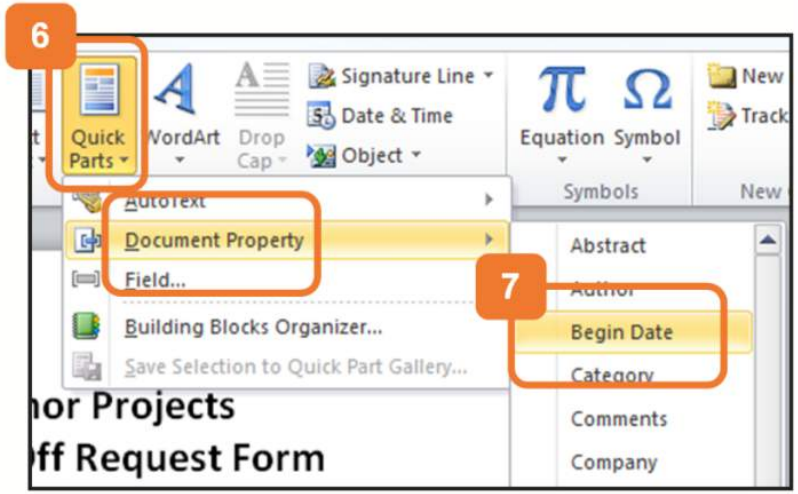
Tricking the Users into Entering Metadata

Property Promotion

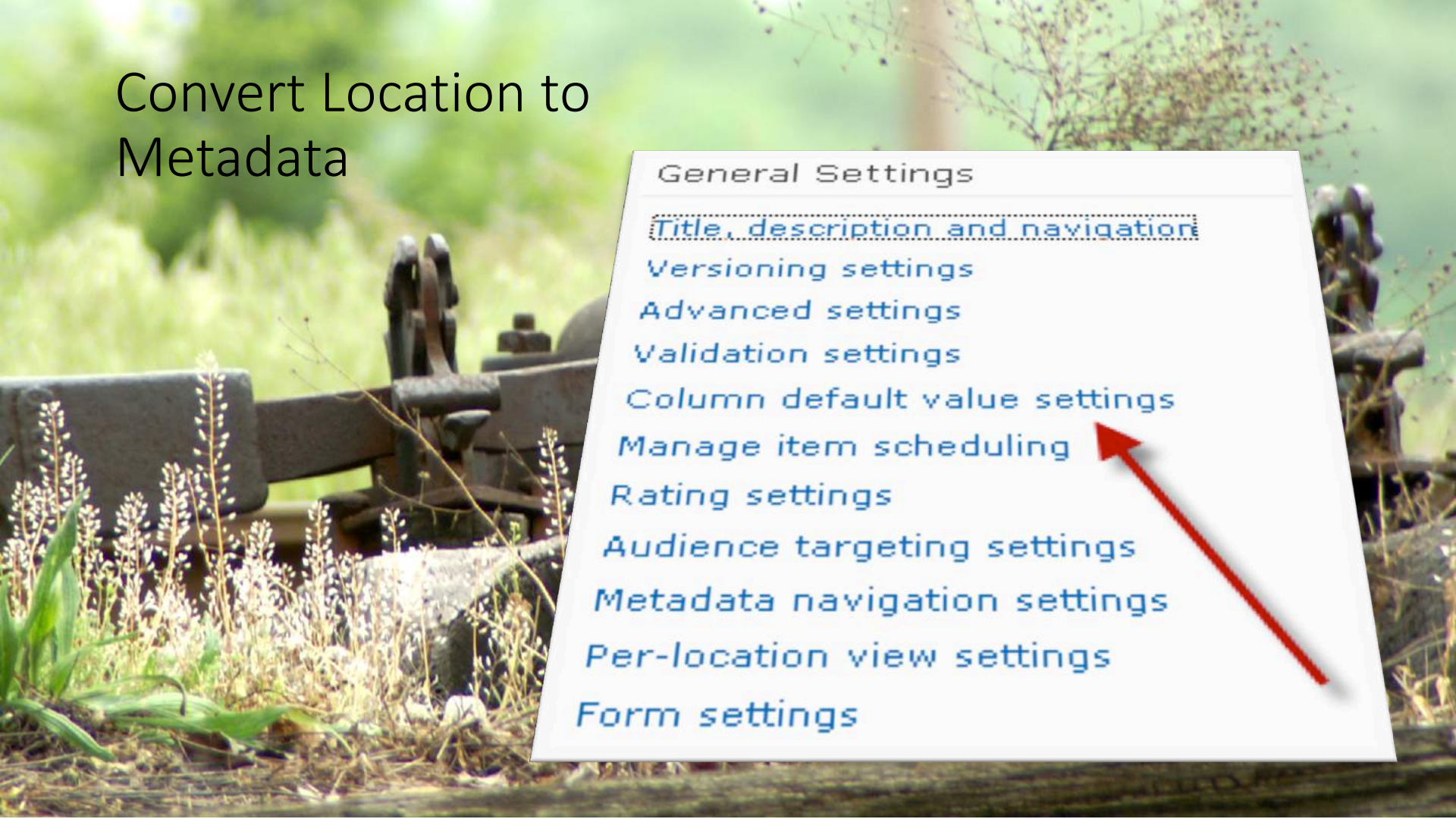
1. Begin in any existing library that has the columns for the metadata you want, or create a new library and add the columns you want. Click the **Library** tab.
2. Click **Library Settings**.



3. Under General Settings, click **Advanced Settings**.
4. Under the Template URL field, click **Edit Template**.
5. Structure the word document as desired. Place the cursor where you want to insert a metadata field, and click the **Insert** tab.
6. Click **Quick Parts**, then select **Document Property** from the drop down menu.
7. The next drop down menu displays fields which correspond to the columns from SharePoint. Select the field you want. Repeat this step to add all the fields to your document template.
8. **Save** and then **Close** the document.



Convert Location to Metadata



HOW TO REACH ME

Robert Bogue

+1-317-844-5310

Rob.Bogue@ThorProjects.com

Resources:

- Book Reviews
  www.ThorProjects.com/blog/book-reviews-list
- The SharePoint Shepherd's Guide
  www.SharePointShepherd.com

Dustin Ray, Business Process Analyst, McKinley Irvin

aiim

FlowForma®
BPM for Microsoft Office 365®

Customer Insight: Say Goodbye to Paperwork and Email Requests with the No-code FlowForma BPM Tool for Office 365

Dustin Ray,
Business Process Analyst,
McKinley Irvin

#aiimtribe

Introducing McKinley Irvin

- Largest divorce and family law firm in the US Pacific Northwest
- **120** people working across **six offices**
- Technology progressive firm
- Fast growth = appetite for process improvements

Our PainPoints

- **Paper-intensive** processes were slow
- **Email** approval requests were hard to track
- Employees were **diverted from focusing** on clients

The Solution

- Deployed FlowForma BPM
- Got some training
- Quickly brought 2 processes online
  - employee onboarding
  - payment approval

Shopping List

- No code ☑
- Intuitive ☑
- Office 365 ☑
- Good value ☑

FlowForma®
BPM for Microsoft Office 365®

The Results

- Impressive **process efficiencies** – freeing up the brain time of our legal staff
- Meeting **regulatory** requirements
- **One-stop-shop** for status of all our business processes
- Better value than a customized software solution
- Maximizing existing IT investments

Recommended Next Steps

Download

Take a free 30 day trial of FlowForma BPM

www.flowforma/trial

Trial

HOW TO REACH ME

- Visit www.flowforma.com to contact the no code experts at FlowForma
- Connect with Dustin Ray on LinkedIn https://www.linkedin.com/in/dustin-ray-8516aa5/

Reminder…

- **Group Chat** – text each other and AIIM staff, found in the icons along the bottom. *(click the widget to open)*
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Lindy Naj, RIM/IG Senior Analyst, Oppenheimer Funds Inc.

The Classification Conundrum

Practical Options for Tackling
It with SharePoint

#aiimtribe

The Conundrum

- Classification Benefits
  - Future-proof against inevitable business process change
  - Enable sorting and filtering
  - Increase effectiveness of search
- Classification Challenges
  - Accounting for culture, appetite, and technical environment
  - Establishing a shared vocabulary/taxonomy
  - Finding the right solution fit

Pragmatic Design Approach

Understand the use case & “content use profile”

- Learn how users work and their needs
- Gauge content consumption preferences

Look at the classification features and tools in SharePoint and the SharePoint ecosystem

Design your solution, bias toward auto-classification

Content Use Profile

Profile Element	Complexity Low	Medium	High
Rate of Process Change			Industry in Flux
Content Centrality		Informs Product	
Content Lifecycle		Short Active Phase	
Content Repeatability		Predictable	
Content Growth		Cyclical	
Search Sophistication	Primarily Browse		
Regulatory Regime			Heavy
ECM Vision/Appetite	Nominal		

SharePoint Classification Tools

Flat List View with or w/o Naming Conventions

Traditional Folder Structure

Choice Column

Default (Traditional) Folder Metadata

Lookup Column

Content Types

Document Set Shared Column Metadata

Auto-classification

Managed Metadata/Taxonomy

Audience Targeting/Security Trimming

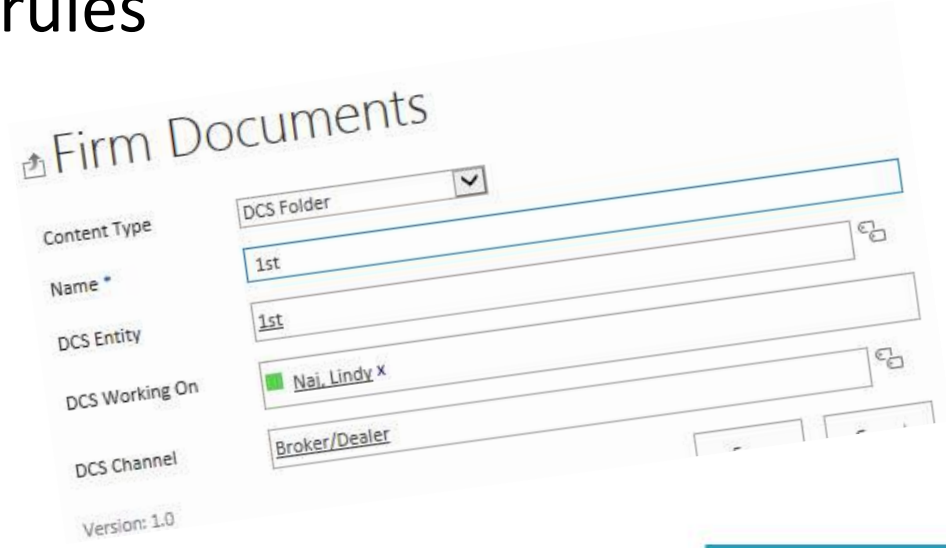
Managed Metadata Navigation

Low **Complexity/Engagement** **High**

Example: Low Complexity

- Use standard folders for default metadata
- Multiple levels provide auto-classification-like feel without complexity of rules

Top Level



Folder Configuration

Firm Documents › 1st

new document or drag files here

All Documents by Entity | All Meeting Docs by Entity | Created/ | Modified

Name

- Account Opening-Maintenance
- DDQ-RFI-RFP
- Firm Intelligence
- Invoices
- Meetings
- Reporting

Second Level

1st

Firm Intelligence

Entity	1st
Quarter	2
Working On	Naj, Lindy
Channel	Broker/Dealer

View All Properties
Edit Properties

new document or drag files here

Recent

Site Contents

Key Filters

Apply | Clear

DCS Entity

Example: High Complexity

- Establish Taxonomy as a prerequisite
- Acquire and auto-classification tool
- Develop and test rules

Rules Configuration

conceptSearching v5.2.7

Index Manager | Taxonomy Manager

Clues | Suggest | Search | Browse | Working Set | Graph | Info | Logs

Legal

Legal Document Type

- Document Preservation Notice (
- Document Production (116 of 1
- Draft Disclosure (60 of 60)
- Filing (3010 of 3010)
- Financial Statement (0 of 0)
- Form (457 of 457)
- General Correspondence (5230
- Guidelines (0 of 0)
- Index (3 of 3)
- Instructions (31 of 31)
- Invoice (0 of 0)
- IP Document (0 of 0)
- List (30 of 30)
- Marketing Material (903 of 903
- Memorandum (2564 of 2564)
- Minutes (6992 of 6992)
- Motion (308 of 308)
- Notice (10 of 10)
- Opinion/Order - Litigation (130
- Organizational Document (1060
- Plan (123813 of 123813)
- Policies and Procedures (52 of 5

Memorandum (ReUsed)

Showing clues for term

Suggest Clues | Search | Delete

	Type	Clue	Score-	Mandat
	Standard		50	
	Metadata	cse-Filename*=*Memo* languages	50	
	Metadata	cse-Filename*=*Memorandum* languages	50	
	Metadata	Document Type:board docs:board memo languages	50	
	Metadata	Document Type=board memo languages	50	
	Standard	Memorandum languages	0	
	Metadata	cse-Filename*=*Memo*in*Opp* languages	-50	
	Metadata	cse-Filename*=*Memo*in*Supp* languages	-50	
	Metadata	cse-Filename*=*Memo*of?Law* languages	-50	
	Metadata	cse-Filename*=*Opp?Memo* languages	-50	
	Metadata	cse-Filename*=*Reply?Memo* languages	-50	
	Metadata	Document Type=Complaint languages	-50	

Bulk Edit

Conclusion: Pragmatic Design Principles

- “Don’t make me think” usability* mantra
- Manual tagging = low/no adoption
- Use folder/doc set metadata to tag
- Use auto-classification tool/machine learning for complex requirements

* Steve Krug, Don't Make Me Think, Revisited: A Common Sense Approach to Web Usability

HOW TO REACH ME

Lindy Naj

Sr. RIM/IG Analyst

Oppenheimer Funds, Inc.

- lnaj@ofiglobal.com
- +1-303-768-2896

James Hoare, Vice President, MacroView

How SharePoint and Office 365 Enables Delightful Document and Records Management

MacroView

#aiimtribe

Overview

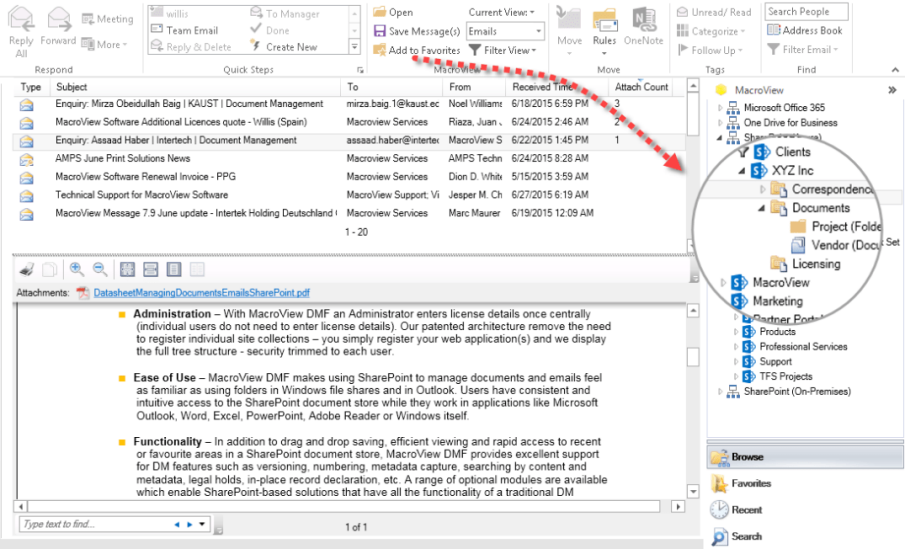
- Making the Document / Records Store easy to visualise and navigate
- Minimising profiling fatigue as you save emails and attachments
- Allowing you to work in the familiar environment of MS Office

Overview

- Integrating with LOB apps without increasing user effort
- Facilitating secure access from anywhere on any device

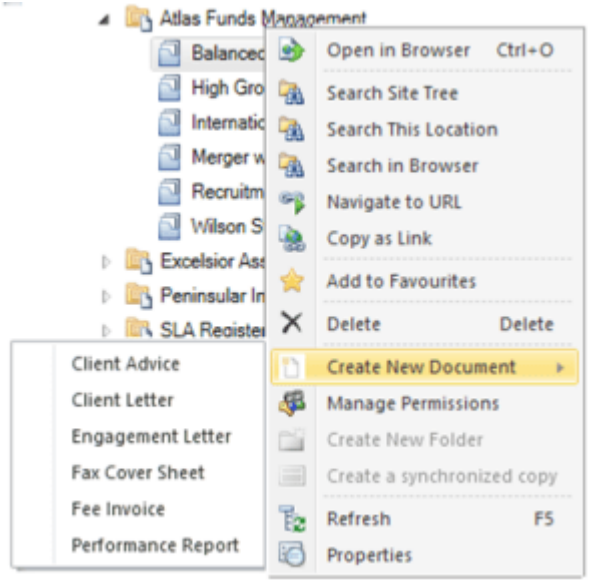
Easy Navigation

- Customer:
  - The Uniting Church
- Tree-view navigation
- Simplifies access to areas of SharePoint



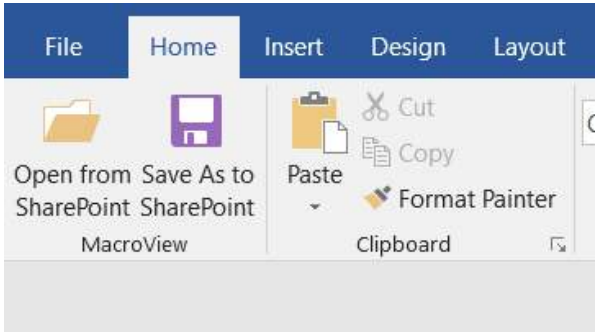
Metadata Profiling

- Capture metadata without prompting
- Minimize profiling fatigue
- Customer:
  - Kuok



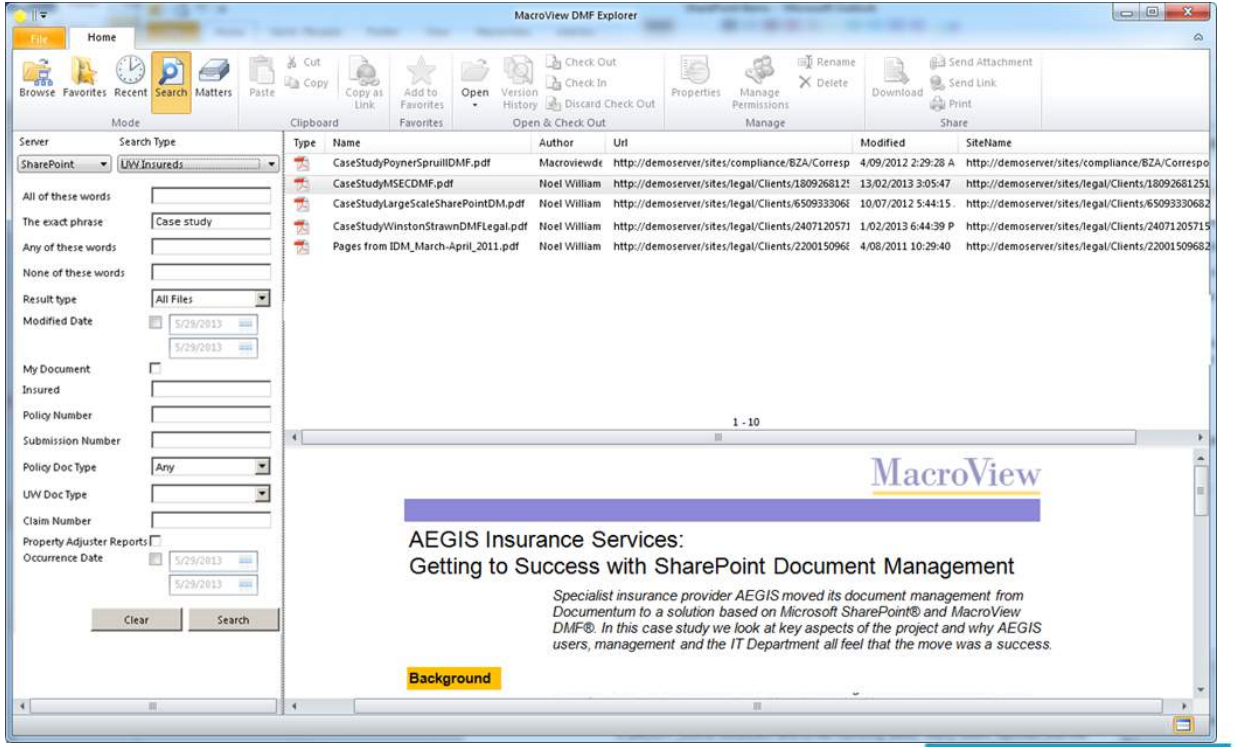
Familiar Office Environment

- Customer:
  - Excelerate Energy
- Work from within Word and other familiar applications



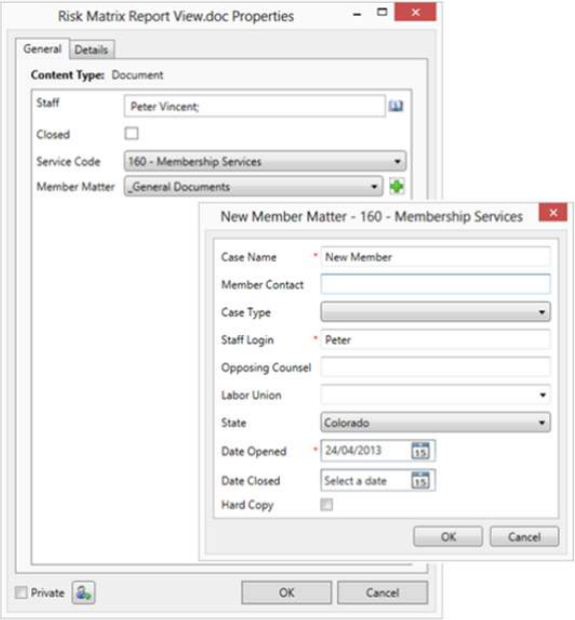
Familiar Office Environment

- Customer:
  - AEGIS
- Search SharePoint from Office



Integrate Existing Systems

- Customers:
  - Mountain States Employer Council
  - AEGIS
- Add records to CRM while profiling documents



Access from Anywhere

- Customer:
  - Webb Henderson
- Access documents in the office, at home, on the road, with the client
- Collaborate with colleagues in real time

HOW TO REACH ME

- James Hoare, MacroView
- james@macroviewusa.com
- https://www.linkedin.com/in/james-hoare

Chris McNulty, Sr. Product Manager, Microsoft

The Digital Difference: Microsoft’s Vision for the Modern Workplace

#aiimtribe

The world is changing

which is changing how we work

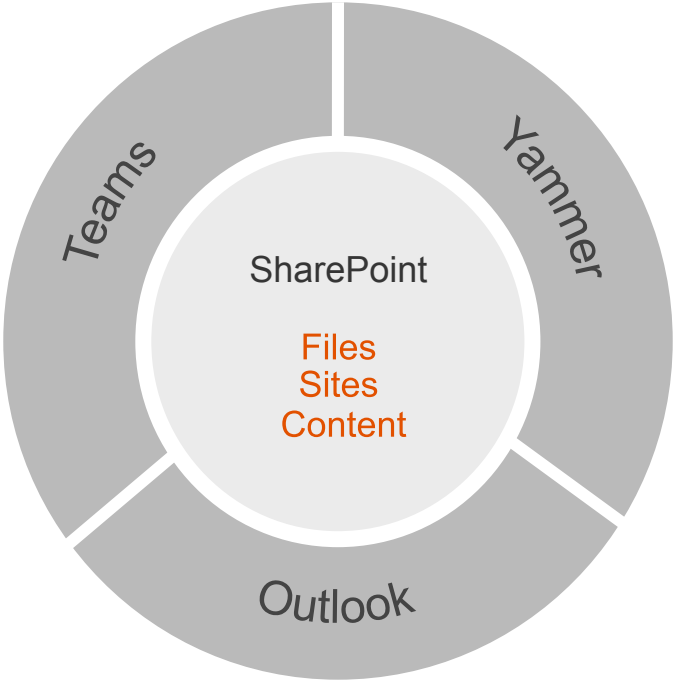
Changing how we work
is changing the world

Microsoft 365

A complete, intelligent solution
to empower employees to be creative
and work together, securely.

Office 365 | Windows 10 | Enterprise Mobility + Security

Microsoft 365: For every type of teamwork



Inner loop

People you work with regularly on core projects

Projects
Product development
Campaign creation
Account teams

Outer Loop

Broad communities with large sets of stakeholders

Corporate communications
Leadership connections
Employee communities
Ideation and crowd sourcing

Email

Ubiquitous for targeted communications

Office 365 Groups

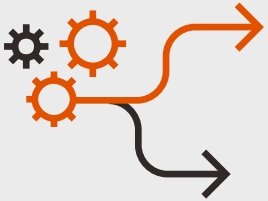
Cross application group membership

SharePoint and OneDrive connect the workplace

with intelligent content management and intranets

Share and work together

Inform and engage people



Transform business processes

Harness collective knowledge

Protect & manage | Extend & develop

SharePoint and OneDrive cloud momentum

300k
oorganizations

85%
of Fortune 500

65%
of all seats are online

90%
growth in active users

300%
growth in sync usage

7x
Gartner &
Forrester Leader

Content services

Content experiences

Content storage

Perpetual

- Availability
- Performance
- Extensible/ APIs
- Encryption
- Indexing
- Intelligence

Policy driven

- Establish policies with retention and classification
- Access control

User centric

- Sharing (personal and teams)
- Collaboration
- Discovery and search
- Workflow

Apps

- Microsoft
- SharePoint
- OneDrive
- Office 365
- Microsoft Teams

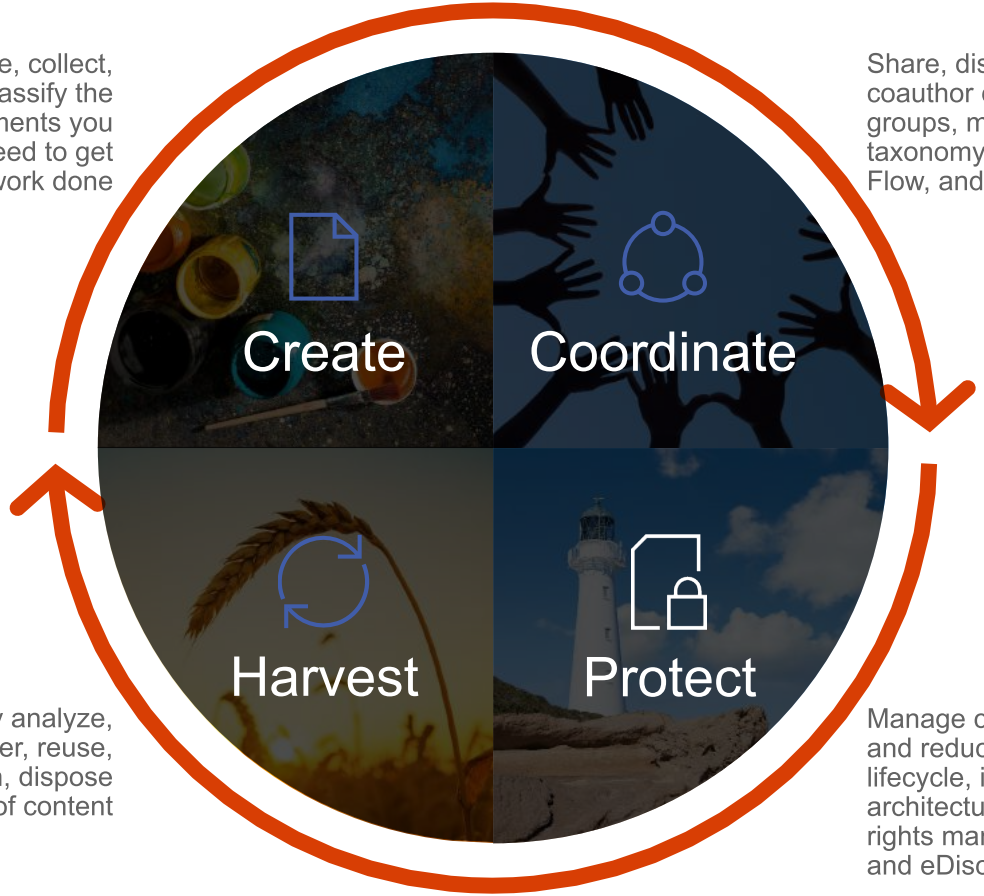
Partners

- K2
- NINTEX
- Gimmal
- RecordPoint
- salesforce

Devices

- Tablet
- Smart phone
- Desktop
- Laptop
- Mixed reality
- Voice/ interactive

Integrated content services



USER DRIVEN ← Partner integrations → IT DRIVEN

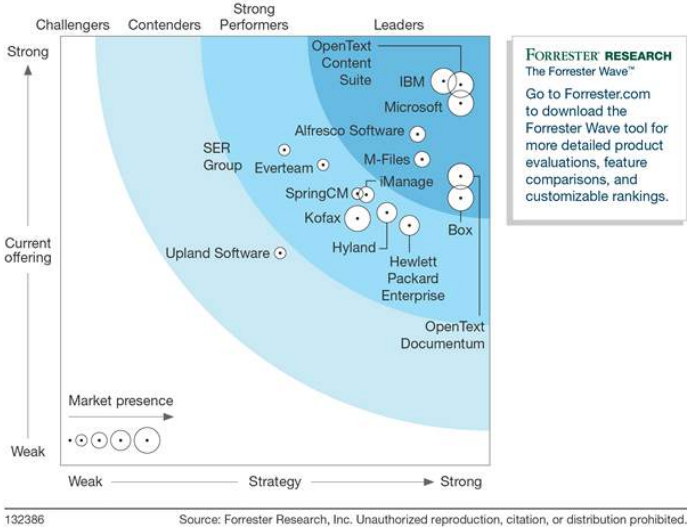
Gartner

Content Services Magic Quadrant 2017

Report and blog: https://aka.ms/gartner-csp17

FORRESTER

Business Content Services Wave 2017



Report and blog: https://aka.ms/odsp-csf

Only one company is a Leader in the 2017 Gartner Magic Quadrants
for both content collaboration and content services: Microsoft

Unstructured content growth

30M
items in a library

25TB
in a site collection

15GB
maximum file size

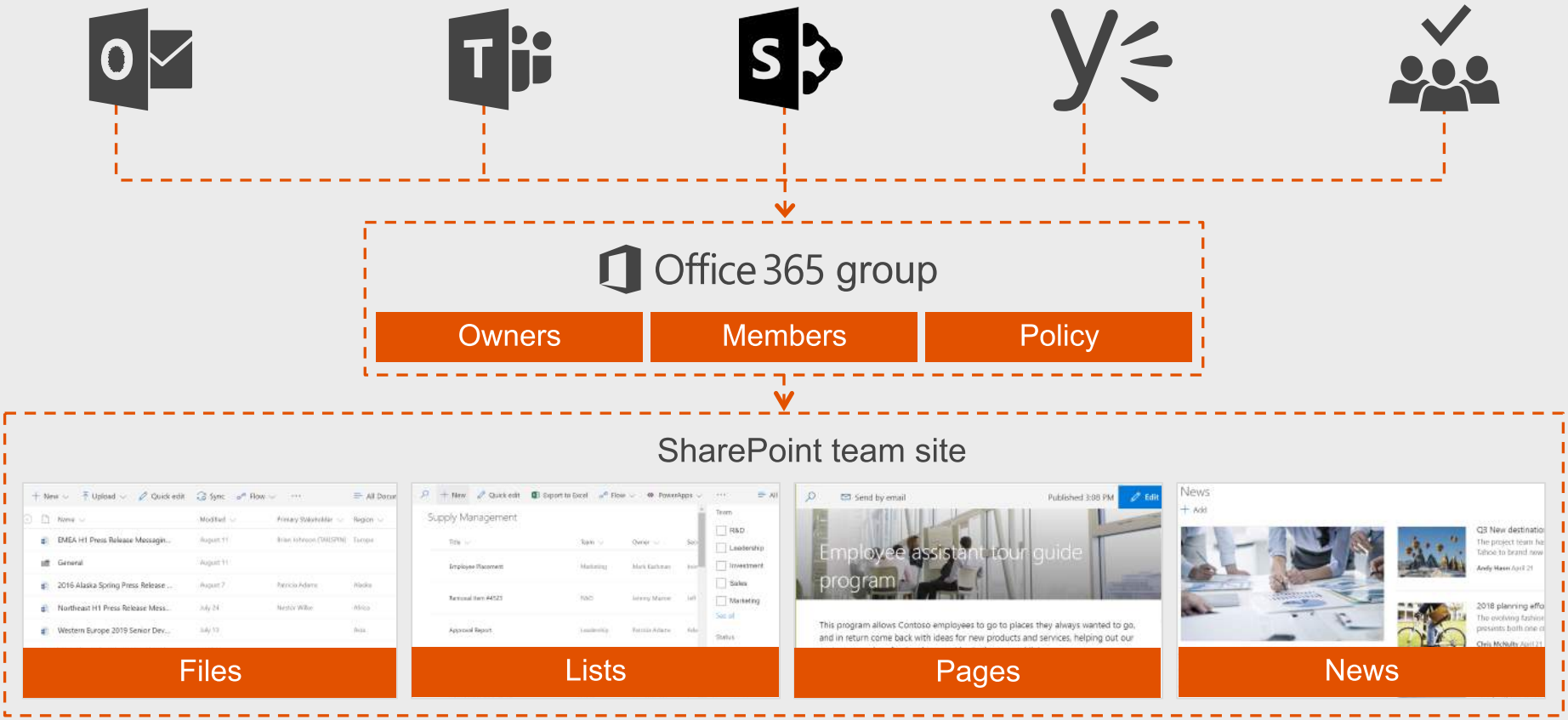
12.5EB
in a tenant

30,000,000,000,000
documents in a tenant

1 ZETTABYTE = 1B TERABYTES

Connect the workplace

SharePoint content services



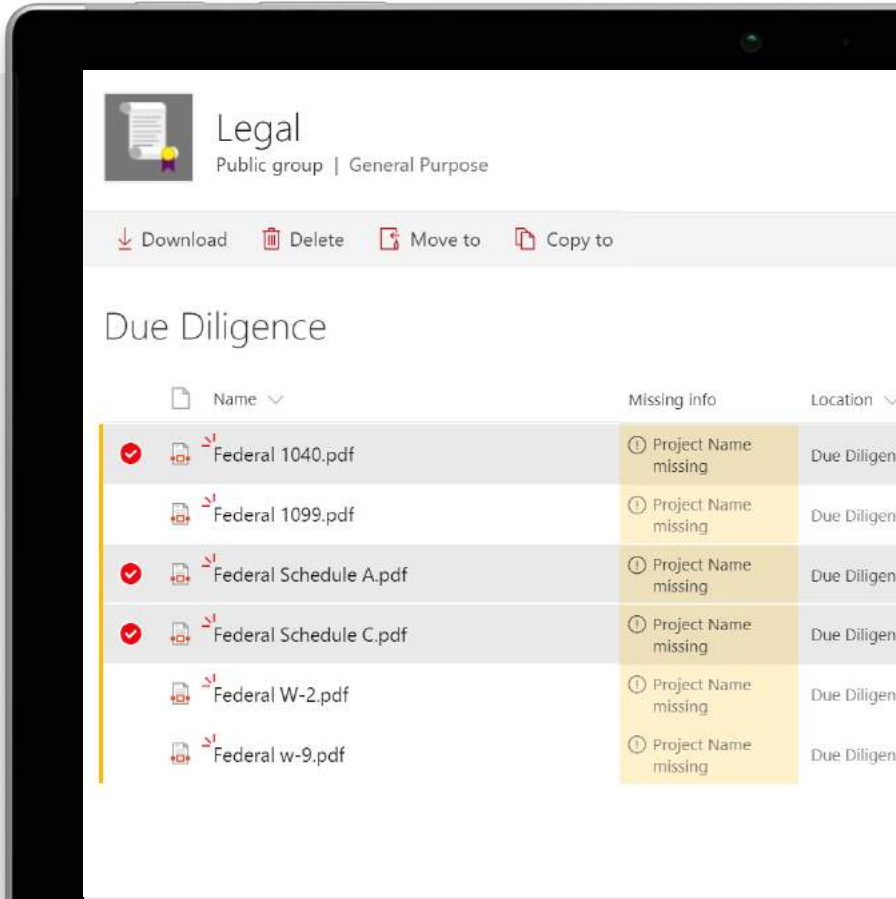
Content services today

Use the full capacity of document libraries with predictive indexing

Manage content and metadata in bulk and at scale with attention views

Automate document review and publishing approvals with Microsoft Flow

Govern information retention and records management with precision using event-based retention policy



Hershey

"Now when someone has that electrifying insight that feeds a creative brief… they use Office 365 to streamline the process of getting the right product to the right market at the right time. With easy access to the latest version of the creative brief on our intranet, we can expedite the development of that new product's package design or 50-second TV spot."

—Mike Wetzel Manager, Business Transformation, Corporate Systems

INDUSTRY
Consumer goods

LEARN MORE

HERSHEY

Content Services Office 365 ISV Integrations

Built by Microsoft:

Standards-driven

Search-driven

Flow (about 200): appFigures, Basecamp 3, Bitly, Blogger, Box, Campfire, Dropbox, Facebook, FTP, GitHub, Google Calendar, Google Drive, Google Sheets, Google Tasks, Insightly, Instagram, Instapaper, Mail,

Built by others:

Nintex, K2, AvePoint, Metalogix, Gimmal, Record Point. Kofax, Knowledge Lake, Adobe, Asana, Xero, InVision, Insightly, SurveyMonkey, Meisterlabs, Litera Microsystems, Hubspot, Trello,

Coming Soon: Workday, Easybib, Tableau, ServiceNow, Kronos

Microsoft Content Services Partner Specialties

YES	Advisory
YES	Implementation
YES	Education
YES	Migration
YES	Capture
YES	Business Process and Worklfow
YES	Analytics
NO!!!!!!	Storage

Critical content services features

	Office 365	The other guys
Intrinsic authoring tools		
Governance / records management		
Architecture and topology		
Capacity		
Workflow engine		
Content ingestion/upload		
File viewers/formats natively supported/ annotations		
Third party data connections		
Enterprise file sync & share		
Certifications		

Resources

Resource center
https://aka.ms/sharepoint-contentservices

Content services white paper
https://aka.ms/odsp-cswp

Security white paper
http://aka.ms/spod-securitywp

Hershey case study
https://enterprise.microsoft.com/en-us/customer-story/industries/retail-and-consumer-goods/hershey/

Next steps

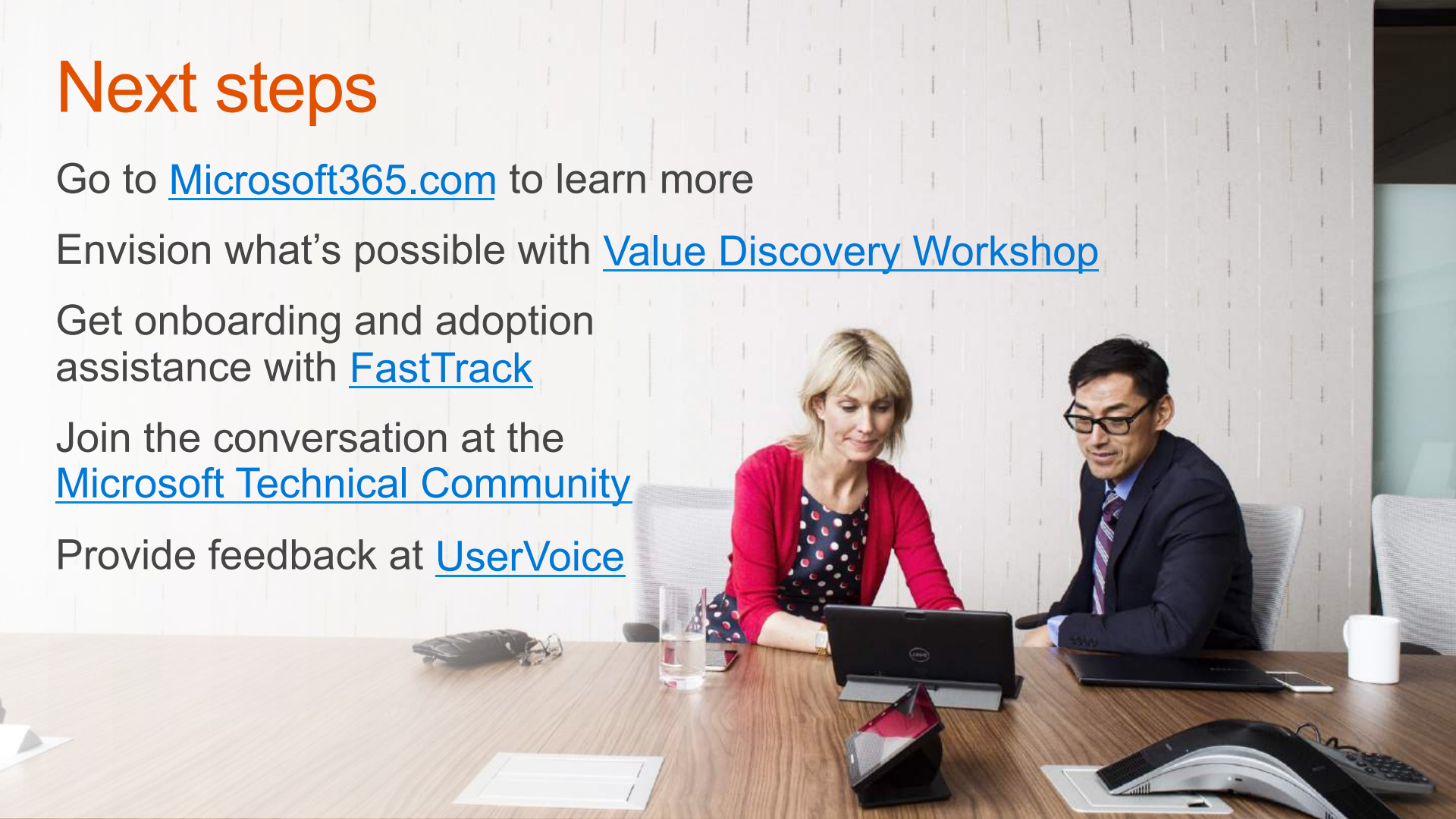
Go to Microsoft365.com to learn more

Envision what's possible with Value Discovery Workshop

Get onboarding and adoption assistance with FastTrack

Join the conversation at the Microsoft Technical Community

Provide feedback at UserVoice



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May 2018

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Bob Larrivee, VP & Chief Analyst, AIIM

FREE REPORT: Learn how to solve the challenges of Office 365 and SharePoint

Office 365 has quickly become the platform of choice for many in the AIIM Community. It's no wonder as this widely used technology offers many advantages for managing information. But, as with any technology or application, it also comes with it's share of challenges.

Download the *FREE Report* for a closer look at managing information with Office 365.

http://info.aiim.org/connecting-and-optimizing-office-365

YOUR DIGITAL TRANSFORMATION BEGINS

WITH INTELLIGENT INFORMATION MANAGEMENT

THE aiim CONFERENCE

SAN ANTONIO

APRIL 11-13

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making content work

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