



How do I setup my SharePoint environment to make Records Management easy?

Best practices, configuration tips and governance!

Housekeeping

1. Use the Q&A panel to ask questions or share comments
2. The video **recording** and **slides** will be shared after the webinar

What we're covering

In this session, learn tips and tricks for structuring SharePoint to play well for records management. We will share configuration best practices and tips for SharePoint so that you are setup for records management success.

Takeaways from the session:

- ✓ Best practices on configuring SharePoint to enable records management
- ✓ Configuration tips and design patterns for SharePoint content types
- ✓ Governance guidance for SharePoint content types



Michael Schweitzer

President and CEO

- ✓ 15 years of enterprise technology experience
- ✓ Microsoft and Collabware certified
- ✓ Collabware MVP recipient
- ✓ Finalist, Information Governance Expert of the Year 2017
- ✓ Vancouver Office 365 user group board member
- ✓ SharePoint Saturdays guest speaker
- ✓ Over 100 SharePoint ECM projects completed

About us

Who we are

A Canadian compliance-inspired services firm helping organizations in their digital transformation journey

Gold

Microsoft Partner



Gold Certified

Collabware Partner



We're certified as a Great Place to Work!





Services

SharePoint Microsoft 365 Collabware Collabspace



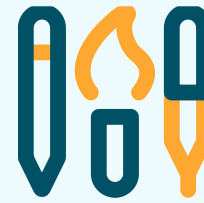
Vision



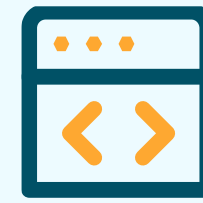
Planning



Strategy



Design



Build



Evolve

Experience Overview

50+

Years of combined
Collabware
experience

10,000+

Users using our
SharePoint and
Office 365 solutions

40+

Microsoft
certifications

25+

Collabware and
Collabspace projects

250+

Years of SharePoint
experience across
our team

18

Collabware Certified
Consultants

50+

Million documents
migrated and
managed in our
solutions

100%

Project success rate



**How do I setup my
SharePoint environment to
make Records Management
easy?**

1) Governance

Roles, Responsibilities, Policies, Procedures and Guidelines, Oh My!

Governance

- ✓ Need to **control** the solution through policies, procedures, guidelines in addition too well-defined roles and responsibilities
- ✓ SharePoint is a skill that is mastered over time
- ✓ It is better if a designated **team** does the roll out for departments
- ✓ Can't let departments go off on **their own** without oversight and guidance

It takes planning and preparation

Questions to answer

Teams Provisioning

- ✓ What is the overall creation process - do we approve teams before they are created?
- ✓ What permissions and guest access are applied?
- ✓ What channels, tabs, libraries are available?
- ✓ What are the templates (if any)?
- ✓ What is the naming convention?

Teams Management and lifecycle

- ✓ How do we avoid sprawl and findability issues later?
- ✓ How do we ensure ownership over time?
- ✓ What are the records management implications?
- ✓ How do we close down inactive/archived teams?

GRAVITY UNION
Governance working session #1
Pookba@rediffmail.com
www.gravityunion.com

Session objectives

- ✓ During this session we will:
 - ✓ Recap governance topics and objectives
 - ✓ Guided discussion: Provisioning and IA
 - ✓ Identify questions to be resolved (parking lot)
 - ✓ Next steps

Schedule

- ✓ Completion Target: May 21, or earlier



Why focus on collaboration governance?

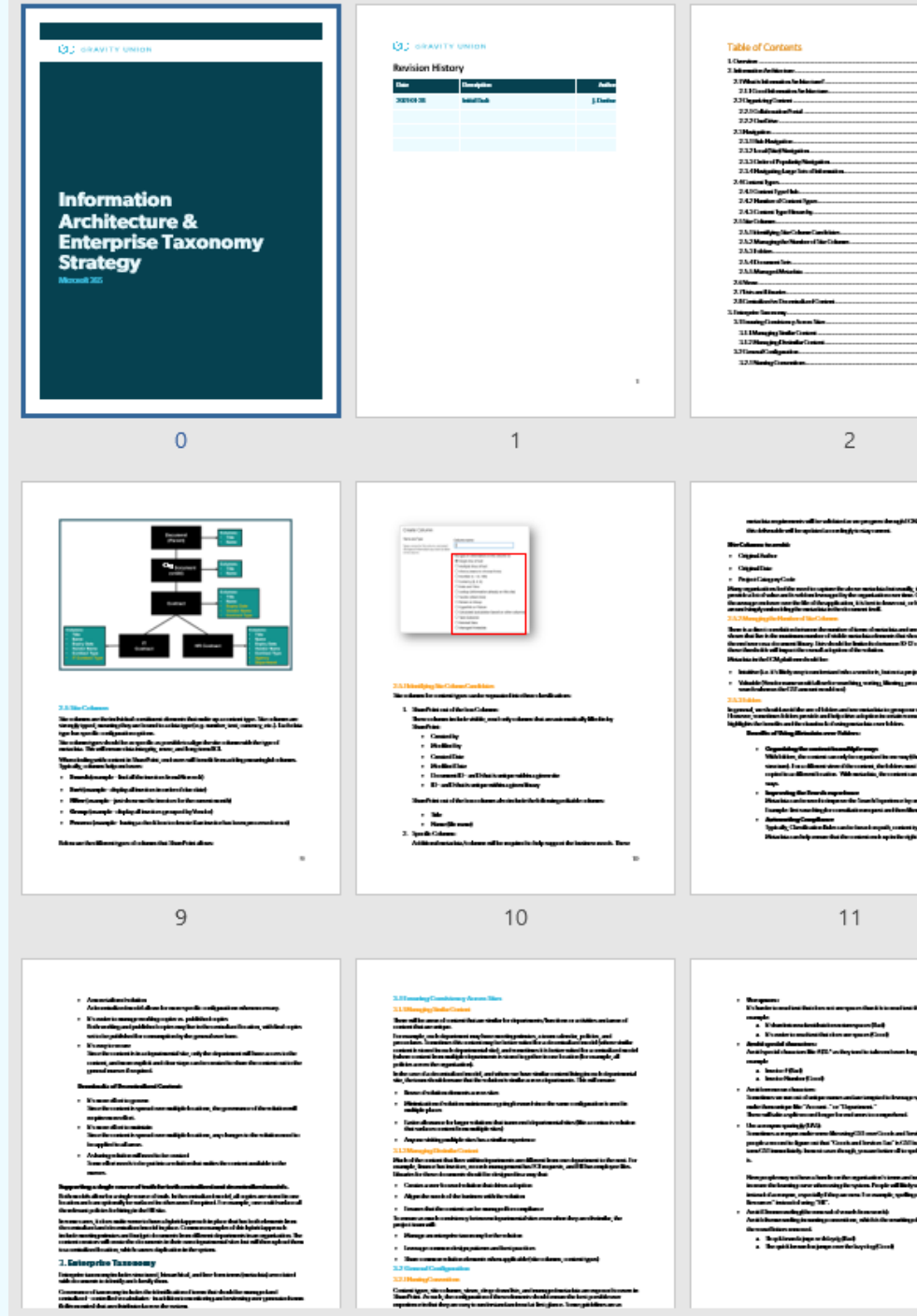
- ✓ Streamline the deployment of Teams and groups
- ✓ Help keep TOL's collaboration system secure as possible
- ✓ Help ensure the best return on investment for cloud collaboration technology
- ✓ Note: we're not focused on Intune, RM, other parts of the M365 stack

Example guidelines

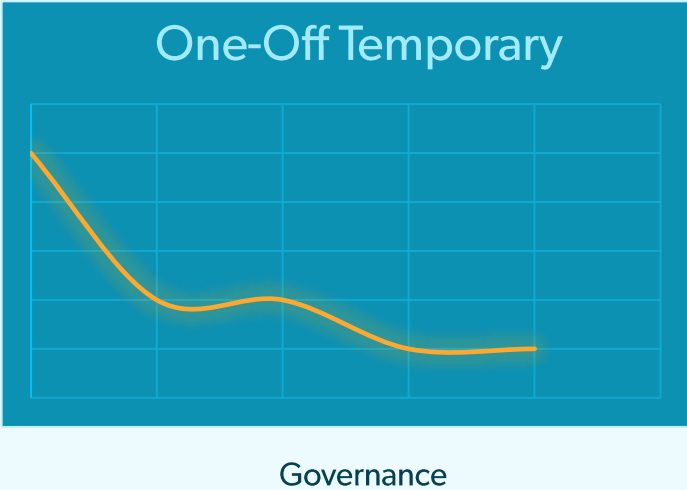
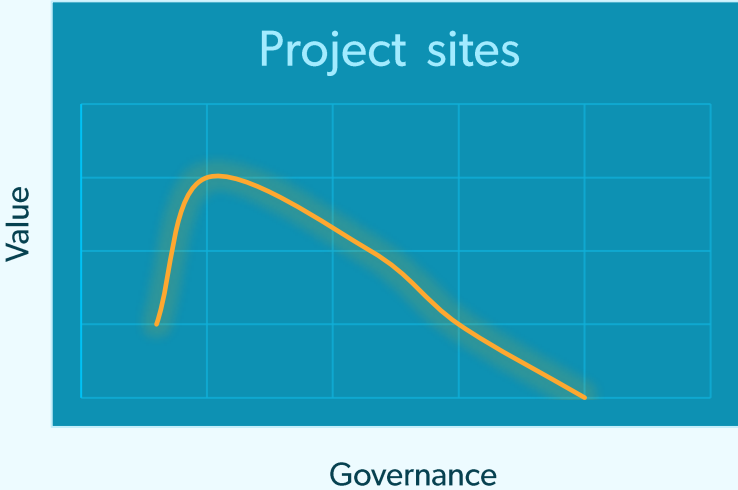
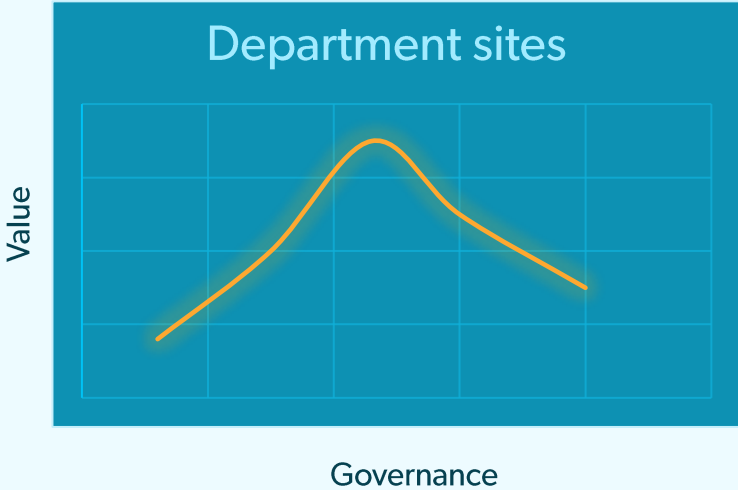
Document and agree on a governance model up-front in key areas...

- ✔ Information Architecture
- ✔ Security
- ✔ Privacy
- ✔ Applied Record Management
- ✔ Migration
- ✔ Change Management (training, communication and Support)
- ✔ Governance (roles, responsibilities, guidelines, procedures)

We've documented all our **lessons learned** and **best practices** to share with all our clients



It's not one-size-fits all



What does a lack of proper governance look like?

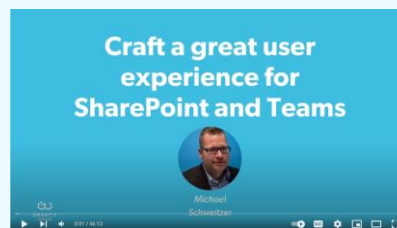
- ✓ Unhappy end users
- ✓ Departments designing their own sites **without oversight**
- ✓ Create a template to use for all departments
- ✓ Not centralizing and standardizing configuration

2) Focus on the end user experience

Navigation, sorting, searching, filtering

Focussing on the end user experience

- ✓ The more dialed-in the user experience, the **happier** end users are, the **less requests** we get to **rework** the solution, the easier records management is over the long run.
- ✓ i.e. don't just **dump** the content in (and fix it later), **design** the solution upfront following best practices
- ✓ Great end user experiences **ALWAYS** provide enough detail to auto classify content increasing our level of compliance
- ✓ Webinar: Craft a great SharePoint and Teams user experience – YouTube
(<https://www.youtube.com/watch?v=n1EKbaEgaMs>)



3) Favour In-place records

Layer compliance on top of your collaboration solution

In place records

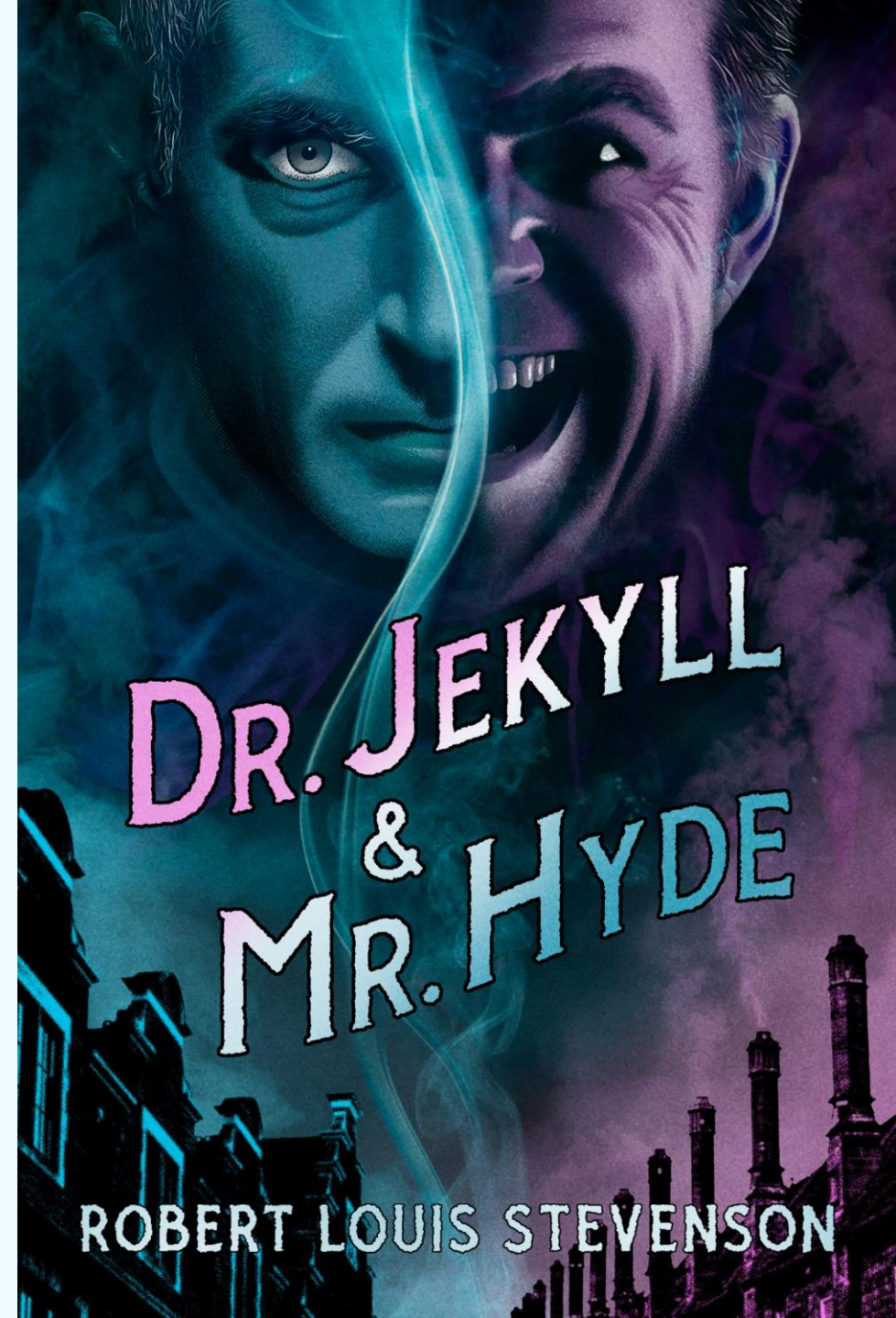
- ✓ Moving records just because they are records is a lot of effort
- ✓ Typically requires manual intervention
- ✓ May lose audit trail continuity (will persist the SharePoint unique ID but the SharePoint Unique ID is not store in the M365 audit trail)
- ✓ Makes records harder to find when they are not in their natural environment
- ✓ Exceptions for obsolete or superseded content

4) Centralized and Standardized Configuration

Use the Content Type Hub

The two personalities of SharePoint

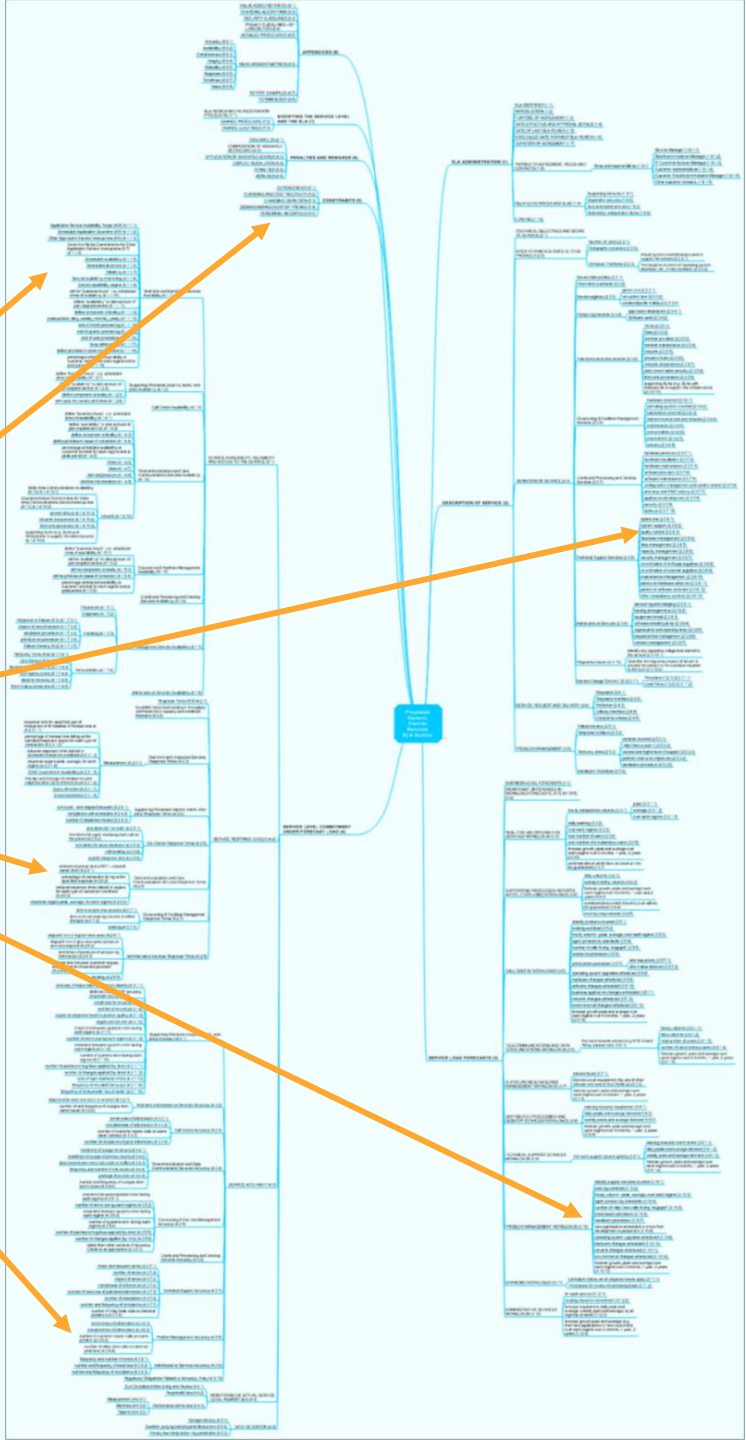
The DNA of SharePoint is both **decentralized** and **centralized**



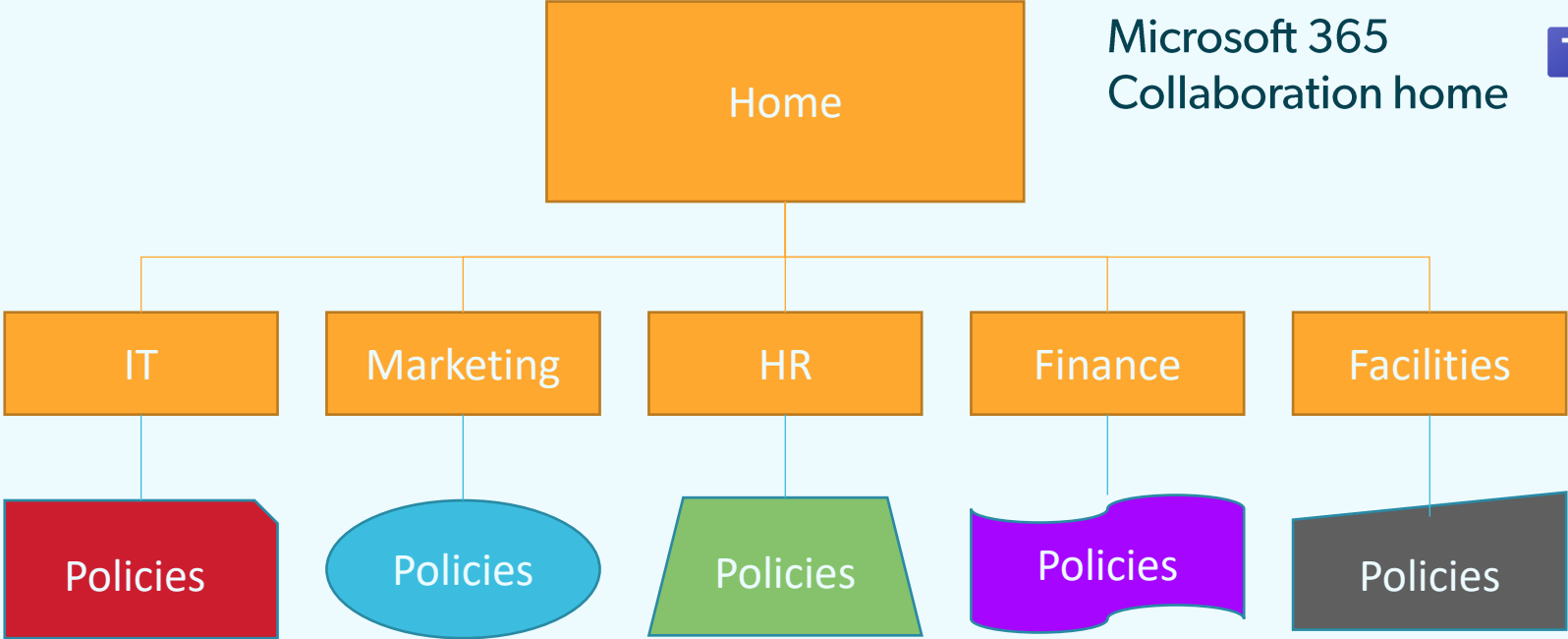
What does this look like?

- ✓ Standardizing on the **Content Type Hub** (the central location to define content types) (or **scripted, templated**)
- ✓ Leverage **managed metadata** when appropriate
- ✓ **Reuse** our configuration (content types and metadata) across the enterprise when possible

Policies



Decentralized configuration



Microsoft 365
Collaboration home



Different content types, metadata, structure

Operations 🗄️
OPS Public group

☆ Not following
👤 11 members

- Home
- Notebook
- Strategic Planning
- Shared with us
- Internal Initiatives
- Initiatives Kanban Board
- Resourcing
- Analytics
- Governing Docs**
- Recycle bin

+ New ▾
📁 Upload ▾
📄 Edit in grid view
🔄 Sync
⋮
☰ All Documents ▾
🔍
📄
🔗

Governing Docs 🗄️ ▾

📄	Name ▾	Modified ▾	Modified By ▾	+ Add column ▾
📁	Guidelines	A few seconds ago	Michael Schweitzer	
📁	Policies	A few seconds ago	Michael Schweitzer	
📁	Procedures	A few seconds ago	Michael Schweitzer	
📁	Standards	A few seconds ago	Michael Schweitzer	



Policies and Procedures

★ Following Share

Policies & Procedures Ho...

+ New Upload Edit in grid view Sync

All Documents* Filter Info

Policies

Procedures

Site contents

Recycle bin

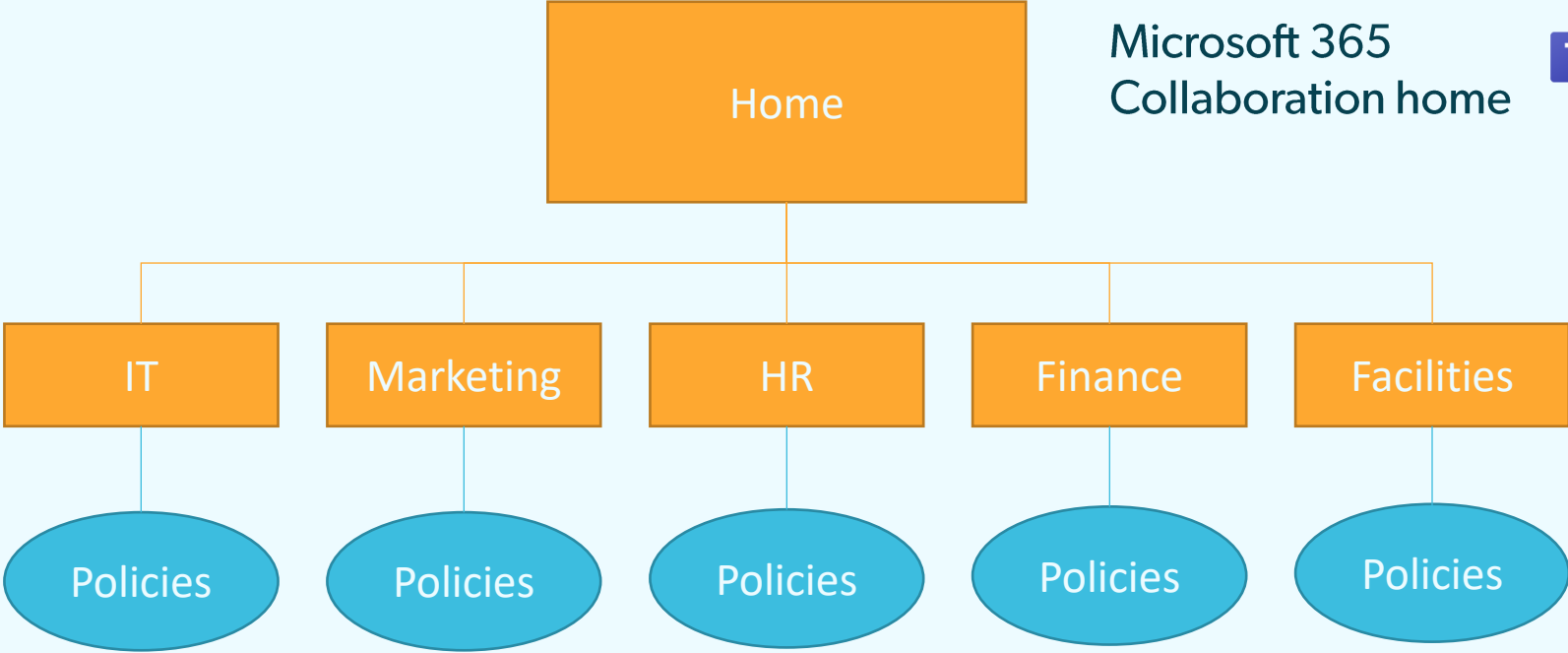
Edit

Policies

Name	Policy Type	Publishing Status	Modified	Modified By
Background Check Policy.docx	General Policy	Published	A few seconds ago	Michael Schweitzer
Gravity Union - Health and Safety Program ...	General Policy	Published	A few seconds ago	Michael Schweitzer
Guidebook.docx	General Policy	Published	A few seconds ago	Michael Schweitzer
Harrassment and Violence Policy.docx	General Policy	Draft	May 13, 2021	Mami Parsons
Harrassment and Violence Policy.pdf	General Policy	Draft	May 13, 2021	Mami Parsons
Health and Safety Policy.docx	General Policy	Draft	May 13, 2021	Mami Parsons
Health and Safety Policy.docx	General Policy	Draft	May 13, 2021	Mami Parsons

Return to classic SharePoint

Centralized Configuration



Microsoft 365
Collaboration home



same content types, metadata, structure



Policies and Procedures

★ Following Share

Policies & Procedures Ho...

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All Documents* Filter Info

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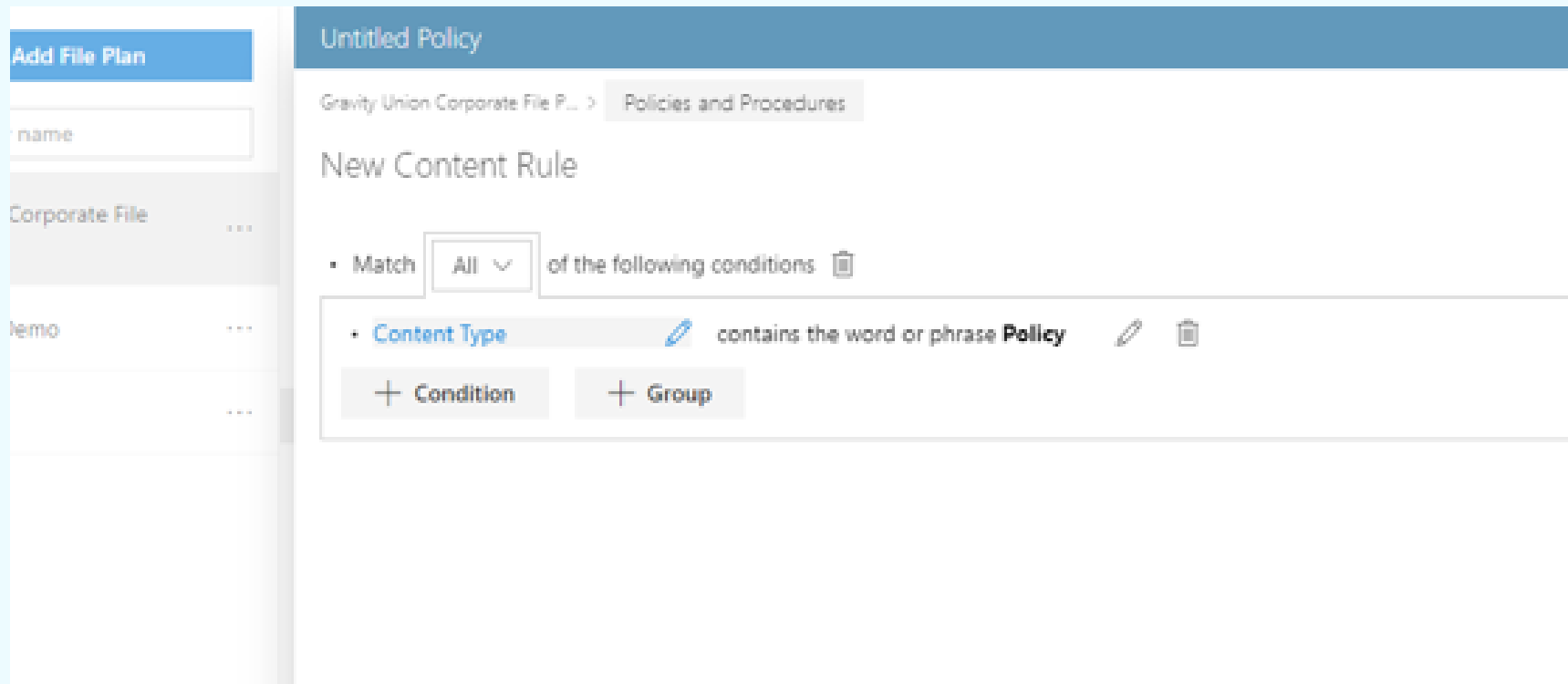
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Health and Safety Policy.docx	General Policy	Draft	May 13, 2021	Mami Parsons
Health and Safety Policy.pdf	General Policy	Draft	May 13, 2021	Mami Parsons

Return to classic SharePoint

Centralized solution makes records management easier



- Reviews
- File Plan
- Workflows
- Templates
- Security
- Tools

[+ Add File Plan](#)

Filter by name

- Gravity Union Corporate File Plan
- Premier Tech Demo
- Training

Untitled Policy

Gravity Union Corporate File P... > Policies and Procedures

New Content Rule

[Back to conditions](#)

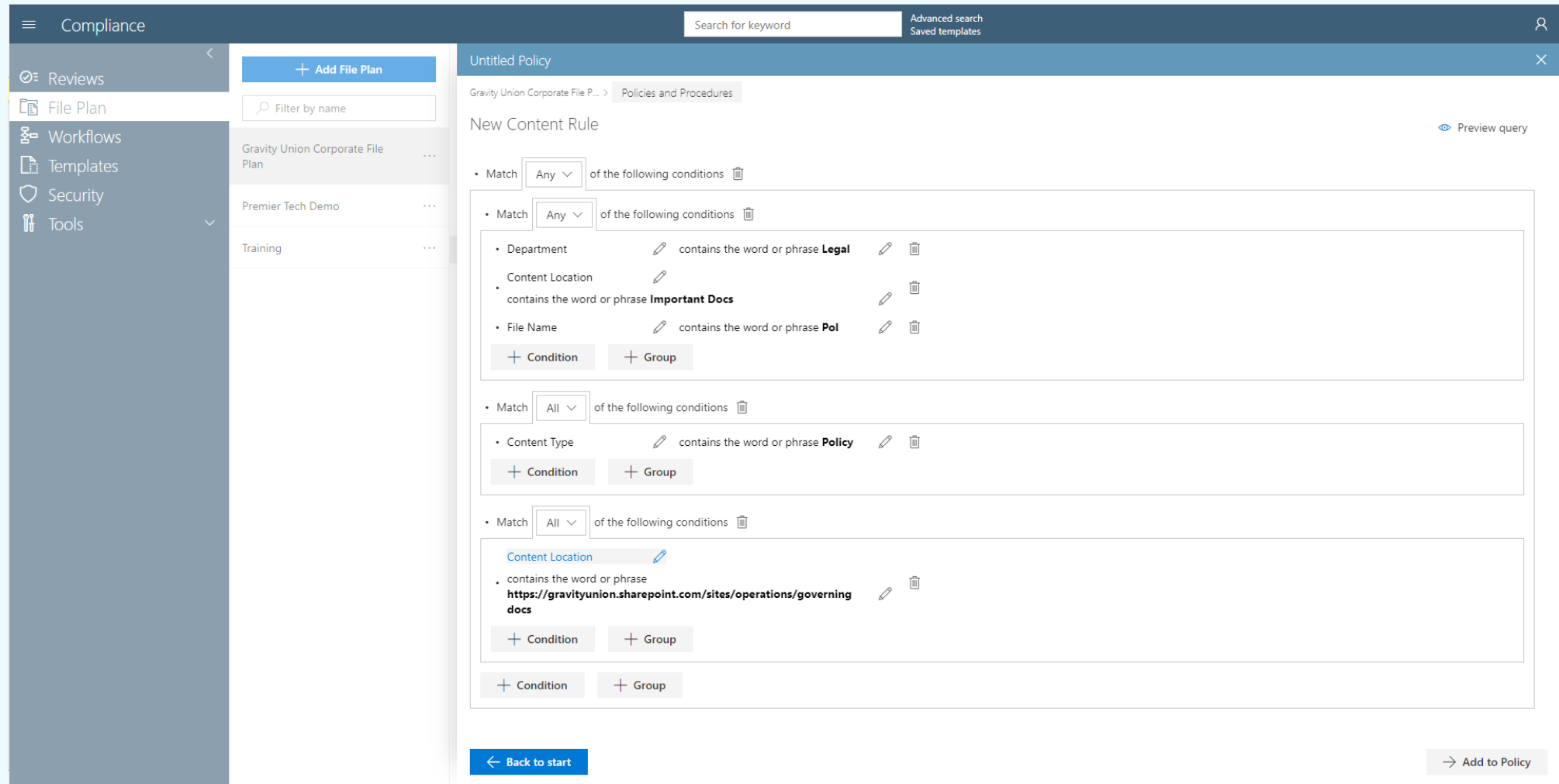
Canada (9)

File Name	Content Summary	Content Location	Collabspace Id	Collabspace Version	DeletedInSource	Collabspace Record Category	Workfl
Harrasment and Violence Policy.pdf	Harasment and Violence Policy Harasment and Violence Policy	Policies and Procedures > Policies > Harrasment and Violer	000002720000000181N6	1	×		
Background Check Policy.docx	[image:]Background Check Policy Table of Contents 1 Why 3 2 What 3 3 DEFINITIONS 3 3.1 Finalist 3 3 2 Background	Policies and Procedures > Policies > Background Check Poli	000002720000000181ND	1	×		
Guidebook.docx	[image:] Guidebook Last Updated: August 27, 2020 Welcome! You made it! Who to contact for you? Who will help	Policies and Procedures > Policies > Guidebook.docx	000002720000000181NC	1	×		
Information Security & Privacy Program.docx	[image:]Information Security & Privacy Program Table of Contents 1 Why do we have this program? 2 2	Policies and Procedures > Policies > Information Security &	000002720000000181N2	1	×		
Health and Safety Policy.docx	Health and Safety Policy [bookmark: _Toc71198662] [bookmark: _Toc71198975][image:]	Policies and Procedures > Policies > Health and Safety Polic	000002720000000181N7	1	×		
Harrasment and Violence Policy.docx	[bookmark: _Toc71568709] [bookmark: _Toc71568753][image:] Harasment and Violence	Policies and Procedures > Policies > Harrasment and Violer	000002720000000181N1	1	×		
Health and Safety	Health and Safety Policy	Policies and Procedures	000002720000000181N4	1	×		

[← Back to start](#)

[→ Add to Policy](#)

Decentralized solution...



The screenshot displays the SharePoint Compliance interface. On the left, a navigation pane includes 'Compliance', 'Reviews', 'File Plan', 'Workflows', 'Templates', 'Security', and 'Tools'. The 'File Plan' section is active, showing a list of file plans: 'Gravity Union Corporate File Plan', 'Premier Tech Demo', and 'Training'. The main area is titled 'Untitled Policy' and shows the configuration for a 'New Content Rule'. The rule is defined by three conditions:

- Match Any** of the following conditions:
 - Department contains the word or phrase **Legal**
 - Content Location contains the word or phrase **Important Docs**
 - File Name contains the word or phrase **Pol**
- Match All** of the following conditions:
 - Content Type contains the word or phrase **Policy**
- Match All** of the following conditions:
 - Content Location contains the word or phrase **https://gravityunion.sharepoint.com/sites/operations/governing docs**

At the bottom of the interface, there are buttons for 'Back to start' and 'Add to Policy'.


Centralized solutions: eDiscovery

Microsoft 365 compliance

New search

- Name and description
- Locations
- Conditions**
- Review your search

Define your search conditions

Query language-country/region: None 

- Condition card builder
- KQL editor

```
ContentType:Policy
```

0 errors detected

emplates



New advanced query

emplates

ery



or description



Ele

• Match **All** of the following conditions

• Content Type contains the word or phrase **Policy**

+ Condition

+ Group



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UNION

New advanced query

Basic search Saved templates

Add all to Hold

Export all

Trigger Event

 Elevated search ⓘ

 Include deleted ⓘ

 All versions ⓘ


Edit query

Display and Sort

Save template as


Canada (9)

File Name	Content Summary	Content Location	
Information Security & Privacy Program.docx	[image:]Information Security & Privacy Program Table of Contents 1 Why do we have this program? 2 2 What is involved? 3 3 Purpose of this program 3 4 Policy & Process 3 4,1 Acceptable Use Policy 3 4.2	Policies and Procedures > Policies > Information Security & Pri...	...
Health and Safety Policy.docx	Health and Safety Policy [bookmark: _Toc71198662][bookmark: _Toc71198975][image:] Health and Safety Policy Last Updated: May 6, 2021 [bookmark: _Toc66357143][bookmark: _Toc71198663][bookmark: _Toc71198976	Policies and Procedures > Policies > Health and Safety Policy.d...	...
Harrassment and Violence Policy.docx	[bookmark: _Toc71568709][bookmark: _Toc71568753][image:] Harassment and Violence Policy Last Updated: May 20, 2021 [bookmark: _Toc66357143][bookmark: _Toc71198663][bookmark: _Toc71198976][bookmark:	Policies and Procedures > Policies > Harrassment and Violence
Guidebook.docx	[image:] Guidebook Last Updated: August 27, 2020 Welcome! You made it! Who to contact for xyz? Who will help me to onboard? [bookmark: _GoBack]Your onboarding buddy, performance	Policies and Procedures > Policies > Guidebook.docx	...
Background Check Policy.docx	[image:]Background Check Policy Table of Contents 1 Why 3 2 What 3 3 DEFINITIONS 3 3.1 Finalist 3 3.2 Background check 3 3.3 Background check vendor 3 3.4 Employment history check 3 3.5 Educational	Policies and Procedures > Policies > Background Check Policy....	...
Gravity Union - Health and Safety Program (2019).docx	[image:]Gravity Union Health and Safety Program (2019) [bookmark: _Toc442355361][image:] SharePoint Office 365 Collabware Collabspac www.gravityunion.com www..gravityunion.com d Health and	Policies and Procedures > Policies > Gravity Union - Health and...	...
Working Remotely.docx	Working Remotely Policy Please note that working	Policies and Procedures > Policies > Working Remotely.docx	...

All Files Sites People News Images Power BI Learning

Feedback


Filters File type Last modified


 **Working Remotely** ⋮

Policies and Procedures > Policies

Mami Shimada Parsons modified on October 18, 2021

Working Remotely Policy Please note that working remotely is an exception, not the norm. Please come and talk to us first, as we




 **Background Check Policy** ⋮

Policies and Procedures > Policies

Michael Schweitzer modified on July 7, 2021

Background Check Policy Background Check Policy Internal Use | July 7, 2021 Version 1.9 Background Check Policy Internal Use | July 7, 2021




 **Gravity Union - Health and Safety Program (2019)** ⋮

Policies and Procedures > Policies

Michael Schweitzer modified on November 12, 2019

Gravity Union Health and Safety Program (2019) SharePoint | Office 365 | Collabware | Collabspace www.gravityunion.com





 **Health and Safety Policy** ⋮

Policies and Procedures > Policies

Mami Shimada Parsons modified on May 13, 2021

Health and Safety Policy Health and Safety Policy...




 **Harrassment and Violence Policy** ⋮

Policies and Procedures > Policies

Mami Shimada Parsons modified on May 13, 2021 • 7 views

Harrassment and Violence Policy Harrassment and Violence Policy...



 **Health and Safety Policy** ⋮

Policies and Procedures > Policies

Mami Shimada Parsons modified on May 13, 2021



Benefits of centralized configuration

- ✓ More easily apply value-add solutions like Records Management and privacy, sensitivity, workflow, integration etc.
- ✓ Consistent user experience
- ✓ Cost savings (more solution reuse)
- ✓ Easier to search\find content regardless of location (eDiscovery)
- ✓ Create cross departmental solutions (eg policies portal)
- ✓ Easier to create reports (list of expired policies, unreviewed)
- ✓ Takes the guess work out of enterprise vs non-enterprise configuration (minimizes maintenance)

**5) Document Libraries should
serve a single purpose**



My sites Recruiting

- Recruiting Home
- Role Descriptions
- Job Postings
- Applicants
- Interview Questions
- Strategy & Planning
- Recycle bin
- Edit

+ New
Upload
Sync
Add shortcut to OneDrive
Pin to Quick access
Export
MOAT Deleted Items
Automate
Integrate
...

Role Descriptions

Name	Department	Role Type	Created	Created By	+ Add column
Department : Consulting (2)					
SharePoint Developer.docx	Consulting	Full Time	August 26, 2020	Mami Parsons	
M365 Analyst.docx	Consulting	Full Time	5 minutes ago	Michael Schweitzer	
Department : Finance (1)					
Department : HR (1)					
Department : IT (1)					



R Recruiting

- Recruiting Home
- Role Descriptions and Cl...**
- Job Postings
- Applicants
- Interview Questions
- Strategy & Planning
- Recycle bin
- Edit

+ New
Upload
Edit in grid view
Sync
Add shortcut to OneDrive
Pin to Quick access
Export
MOAT Deleted Items
Automate
Integrate

Role Descriptions and Client Contracts

Name	Department	Role Type	Created	Created By	Client	+ Add column
Accounts Payable Clerk.docx	Finance	Full Time	38 minutes ago	Michael Schweitzer		
HR Manager.docx	HR	Part Time	39 minutes ago	Michael Schweitzer		
IT Manager.docx	IT	Full Time	39 minutes ago	Michael Schweitzer		
M365 Analyst.docx	Consulting	Full Time	37 minutes ago	Michael Schweitzer		
Microsoft Contract.docx			5 minutes ago	Michael Schweitzer	Microsoft	
SharePoint Developer.docx	Consulting	Full Time	August 26, 2020	Mami Parsons		



Recruiting

Recruiting Home

+ New
Upload
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Add shortcut to OneDrive
Pin to Quick access
Export
MOAT Deleted Items
Automate
Integrate
...

Role Descriptions and Cl...

Job Postings

Applicants

Interview Questions

Strategy & Planning

Recycle bin

Edit

Role Descriptions and Client Contracts

>	Name	Department	Role Type	Created	Created By	Client	+ Add column
▼	Client : Unassigned (5)						
	SharePoint Developer.docx	Consulting	Full Time	August 26, 2020	Mami Parsons		
	HR Manager.docx	HR	Part Time	40 minutes ago	Michael Schweitzer		
	IT Manager.docx	IT	Full Time	39 minutes ago	Michael Schweitzer		
	Accounts Payable Clerk.docx	Finance	Full Time	38 minutes ago	Michael Schweitzer		
	M365 Analyst.docx	Consulting	Full Time	38 minutes ago	Michael Schweitzer		
▼	Client : Microsoft (1)						
	Microsoft Contract.docx			6 minutes ago	Michael Schweitzer	Microsoft	

R Recruiting

☆ Not following Share

- Recruiting Home
- Role Descriptions and Cl...
- Job Postings
- Applicants
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- Strategy & Planning
- Recycle bin
- Edit

+ New Upload Sync Add shortcut to OneDrive Pin to Quick access Export MOAT Deleted Items Automate Integrate ...


Role Descriptions and Client Contracts

Name	Department	Role Type	Created	Created By	Client	+ Add column
Client : Unassigned (5)						
SharePoint Developer.docx	Consulting	Full Time	August 26, 2020	Mami Parsons		
HR Manager.docx	HR	Part Time	40 minutes ago	Michael Schweitzer		
IT Manager.docx	IT	Full Time	39 minutes ago	Michael Schweitzer		
Accounts Payable Clerk.docx	Finance	Full Time	38 minutes ago	Michael Schweitzer		
M365 Analyst.docx	Consulting	Full Time	38 minutes ago	Michael Schweitzer		
Client : Microsoft (1)						
Microsoft Contract.docx			6 minutes ago	Michael Schweitzer	Microsoft	

By Client

- List
- Compact List
- Tiles
- Files that need attention
- All Documents
- By Client
- By Department
- By Employment Status
- Doc Set View
- Create new view
- Save view as
- Set current view as default
- Edit current view
- Format current view

Single Purpose Libraries

 EDIT LINKS

Job Descriptions ▸ Settings

 EDIT LINKS

Settings ▸ Apply Label

Apply a label to items in this library

The labels here are provided by your organization to help retain and protect important information. When applied, all items in this library will be subject to the label's settings. For example, if you apply a label that retains content for 1 year, all new items in this library will inherit the label and be retained for 1 year. You can also apply the label to items that already exist in the library.

Job Competitions (Retain for 2 days) ▾

Apply label to existing items in the library.

▫ Audience targeting settings

▫ Rating settings

▫ Form settings

▫ Enterprise Metadata and Keywords Settings

▫ Information management policy settings

Common **Anti**-Patterns

- ✓ Document Library per Client
 - ✓ Contracts
 - ✓ Invoices
 - ✓ Email Communication

Where we would likely have different metadata

It's an art form...

Sometimes its make sense...

E.g. Employee File (a couple of dozen files)

Questions to ask

- ✓ Start with the posture of a single purpose library but consider exceptions..
 - Large volume?
 - Different classifications?
 - Lots of views required?
 - Different metadata required per document type?
 - Do we need different workflows per document type?

Single Purpose Libraries

- ✓ Ensures you don't have to restructure content down the road
- ✓ Easy for end users to remember where content lives
- ✓ Minimizes the number of clicks\inputs (we don't need to choose a document type or content type)
- ✓ Minimizes the number of available views
- ✓ No confusion around what metadata to show or not show

6) Avoid Folders

As much as possible



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UNION

Booo Folders

- ✓ Brittle (can change too easily, hard to govern)
- ✓ Opens the solution up to **human error** (spelling mistakes)
- ✓ Limits how we can view content (to the folder structure)
- ✓ End up with empty folders
- ✓ More clicking around

We still have intuitive buckets

SharePoint (platform)



Human Resources (hub site)



Recruiting (site)



Role Descriptions (library)



Department

R Recruiting

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- Interview Questions
- Strategy & Planning
- Job Descriptions**
- Recycle bin
- Edit

+ New Upload Edit in grid view Sync Add shortcut to OneDrive Pin to Quick access Export MOAT Deleted Items

Job Descriptions

Name	Modified	Modified By	+ Add column
Accounting	A few seconds ago	Michael Schweitzer	
Consulting	A few seconds ago	Michael Schweitzer	
Finance	A few seconds ago	Michael Schweitzer	
HR	A few seconds ago	Michael Schweitzer	
IT	A few seconds ago	Michael Schweitzer	





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Copy link
Sync
Download
Add shortcut to OneDrive
Export
MOAT Del

Job Descriptions > HR

Name	Modified	Modified By	+ Add column
HR Manager.docx	About a minute ago	Michael Schweitzer	

R Recruiting

Recruiting Home

[+ New](#)
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[Edit in grid view](#)
[Sync](#)
[Add shortcut to OneDrive](#)
[Pin to Quick access](#)
[Export](#)
[MOAT Deleted Items](#)
[Automate](#)

Role Descriptions

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Interview Questions

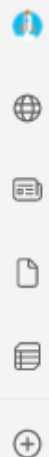
Strategy & Planning

Recycle bin

Edit

Name	Department	Role Type	Created	Created By	+ Add column
Accounts Payable Clerk.docx	Finance	Full Time	12 minutes ago	Michael Schweitzer	
HR Manager.docx	HR	Part Time	14 minutes ago	Michael Schweitzer	
IT Manager.docx	IT	Full Time	13 minutes ago	Michael Schweitzer	
M365 Analyst.docx	Consulting	Full Time	12 minutes ago	Michael Schweitzer	
SharePoint Developer.docx	Consulting	Full Time	August 26, 2020	Mami Parsons	

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[Add shortcut to OneDrive](#)
[Pin to Quick access](#)
[Export](#)
[MOAT Deleted Items](#)
[Automate](#)
[Integrate](#)

Role Descriptions

>	Name	Department	Created	Created By	+ Add column
▼	Role Type : Full Time (4)				
	SharePoint Developer.docx	Consulting	August 26, 2020	Mami Parsons	
	IT Manager.docx	IT	8 minutes ago	Michael Schweitzer	
	Accounts Payable Clerk.docx	Finance	7 minutes ago	Michael Schweitzer	
	M365 Analyst.docx	Consulting	7 minutes ago	Michael Schweitzer	
▼	Role Type : Part Time (1)				
	HR Manager.docx	HR	9 minutes ago	Michael Schweitzer	

SharePoint Search this library

People and Culture Team Management Culture Recruiting Policies and Procedures Benefits and Pay Skylab

R Recruiting

Recruiting Home + New Upload Edit in grid view Sync Add shortcut to OneDrive Pin to Quick access Export MOAT Deleted Items Automate Integrate

Role Descriptions > Part Time

Name	Department	Role Type	Created	Created By	+ Add column
HR Manager.docx	HR	Part Time	20 minutes ago	Michael Schweitzer	

Filter by 'Role Type' (1)

Full Time

Part Time

Apply Clear all

Benefits of **not** using folders

- ✓ Easier and more consistent classification of content for records and privacy
- ✓ Easier and more cost effective eDiscovery
- ✓ More consistency of solutions and metadata across the enterprise
- ✓ More business value (searching, sorting, filtering, workflows, integration)

7) Design to minimize maintenance

Changes to the solution require changes to your RM configuration

Minimizing maintenance

- ✓ The more our solution **changes** over time, the more RM **configuration** (and re-configuration) is required and/or the more **complicated** our RM configuration needs to be
- ✓ Key Areas
 - ✓ Scalability
 - ✓ Security
 - and
 - ✓ User Experience
 - ✓ Avoiding folders
 - ✓ Centralizing configuration

Scalability

- ✓ SharePoint has **thresholds** and **limitations** for the amount of content for a given library or view
- ✓ The **more content** we place into a document library the **more metadata** we need (more complicated design, harder on the end-user)
- ✓ If we don't design for scalability then we'll hit the limits or create an less than optimal solution and need to restructure the solution at some point

Scalability

- ✓ Ensure we **anticipate** at the long term volume of content (what's it going to be 5 years out? 10 years out?)
- ✓ We target **5,000-10,000**
- ✓ Favour **auto-scaling** solutions
 - like removing\moving content when no longer needed to limit the content (Active vs semi-active)
- ✓ If new buckets are required (lists, libraries, sites) ensure we automate the provisioning to ensure consistency of configuration (content types)
 - Eg Invoices 2010, Invoices 2011 etc...

Security

- ✓ Does the solution design **support** the required security (without constantly changing\breaking security models)
- ✓ Solutions that have a high **volatility** of **security** changes are more likely to be redesigned\restructured
- ✓ We should be designing our solution so that it will require minimal changes to security

8) Include RM input in design

Include RM in design

- ✓ Have an RM representative at the table to ensure we'll be able to meet our needs around compliance.
- ✓ IT\The business should not be rolling out Teams, SharePoint etc. without looping in the RM team.

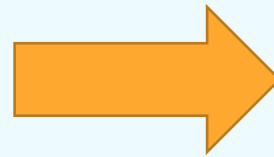
9) Don't lift and shift



Lift and shift



Network file storage\old system

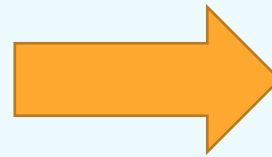


SharePoint Online!

Properly Designed...



Network file storage\old system



SharePoint Online!

Lift and shift

- ✓ When organizations don't have the time to design a proper SharePoint solution and just dump the content in...
- ✓ Creates a frustrating end user experience, is typically hard to govern and apply records management
- ✓ Will need to circle back at some to fix it (*its more effort to restructure content once it is in SharePoint*)
- ✓ Increased end user frustration
- ✓ Increased maintenance (Costs more \$\$\$ than getting it right the first time)
- ✓ Decreased compliance

10) Auto Classify Everything

Manual classification

Auto classify everything

- ✓ End users typically don't care about records management (and they shouldn't have to)
- ✓ Manual classification decreases classification accuracy
- ✓ Solutions properly design NEVER NEED manual classification
- ✓ If the content cannot be auto classified then the solution has been designed incorrectly – a good check and balance on solution design

11) Very Big buckets are bad

Some organizations are considering very few generic buckets (7 year, 10 year, 20 year etc.)

Very Big Buckets are Bad

- ✓ Big bucket file plans were a desperate? attempt to make manual classification easy (making compromises)
- ✓ Auto classification negates the need to manually classify content
- ✓ Larger file plans have value (owner, approver, reviewer, disposition authorities, provision\citation, eDiscovery)
- ✓ Too large a bucket will make disposition review process slow and cumbersome
- ✓ Too large a bucket will make auto classification rules large, complex and hard to manage
- ✓ Too large a bucket will not allow you to align the retention workflow to end user needs
- ✓ Functional file plans are recommended (300-400) where record categories determine who the disposition authority should be

In Summary

- ✓ Set up a clear and effective governance structure
- ✓ Focus on the end user experience
- ✓ In place records
- ✓ Centralize and standardize configuration
- ✓ Shoot for single-purpose document libraries
- ✓ Avoid folders when possible
- ✓ Design to minimize maintenance
- ✓ Include RM in the design
- ✓ Don't lift and shift
- ✓ Auto Classify everything (no manual classification!)
- ✓ Very Big Buckets are bad

Questions?

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