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SharePoint Pro

## SharePoint & Office 365 | What's New for ECM & Your Mobile Workforce

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SharePoint

# Enterprise Content Management in SharePoint and OneDrive (ECM) best

Chris McNulty

with  
SharePoint and Office  
365



# Key Topics

ECM Defined

Create

Coordinate

Protect

Next Steps

# ECM democratized



User driven

IT driven



**Partner integrations**

# ECM defined

Enterprise content management is a **holistic approach to managing the entire lifecycle** of document creation, sharing, consumption, reuse, knowledge and records management, archiving and disposal

Modern ECM needs to cover the **first mile** as well as the final nine of a document's lifespan. We call this **content velocity**

Modern ECM is **people-centric**—allowing for personal management (copy/move, hashtags) and organizational management (KM, RM, ILM)

**Policy and security:** intelligent, simple, and automated—protect content at all phases of its life

# ECM Market Stats

*US\$6.7B*

\$9.3B by 2020 (IDC)

In the US alone, \$748 billion is lost in productivity as users search for documents that were already created; nearly \$680 billion recreating documents they can't find and reuse (Nucleus Research 2016)

*US\$9B*

(Forrester)

# OneDrive and SharePoint Capacity

**30MM**

- Items in a library

**25TB**

- in a site collection (new)

**10GB**

- Max file size

**New**

- File previews (pdf, video, email, Adobe)

**New**

- Extended file characters



# Create



# Create, share, discover

## Office integration on Windows, Mac, and mobile

- Save, share, real-time coauthoring
- Properties, recent, version history, check out/in

## Content types

- Template and metadata, per-site or tenant-wide

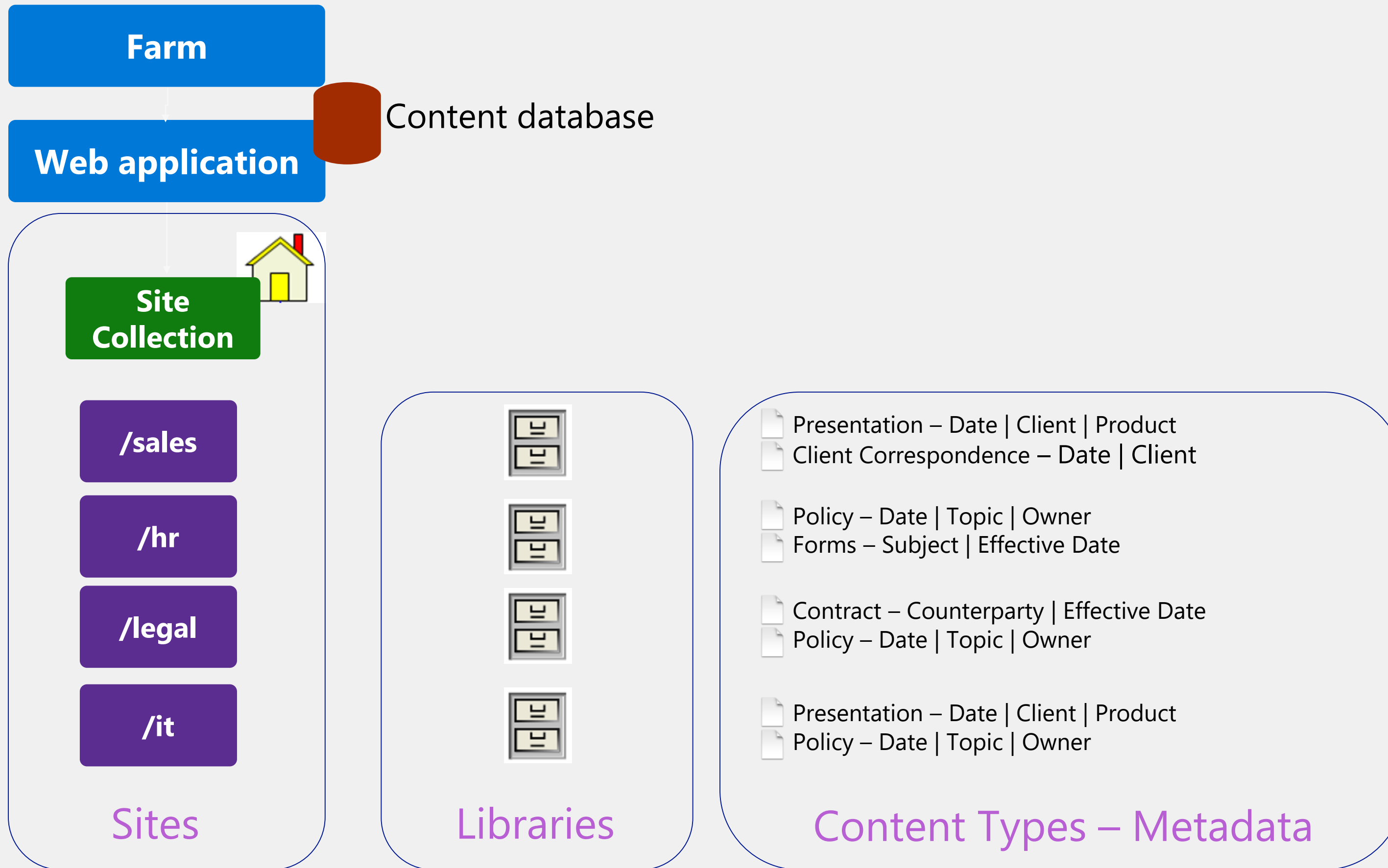
News, pages, lists

Simple link sharing, internal and external

Office Lens

Discovery powered by Delve

# SharePoint Information Architecture (<http://intranet>)



# Content types?

- Information classification across multiple sites or site collections
- Shared set of properties
  - Document template
  - Information lifecycle
  - Metadata

## Site Content Types ▸ Site Content Type

### Site Content Type Information

**Name:** ContosoDoc  
**Description:**  
**Parent:** Document  
**Group:** Custom Content Types

### Settings

- Name, description, and group
- Advanced settings
- Workflow settings
- Delete this site content type
- Document Information Panel settings
- Information management policy settings
- Manage publishing for this content type

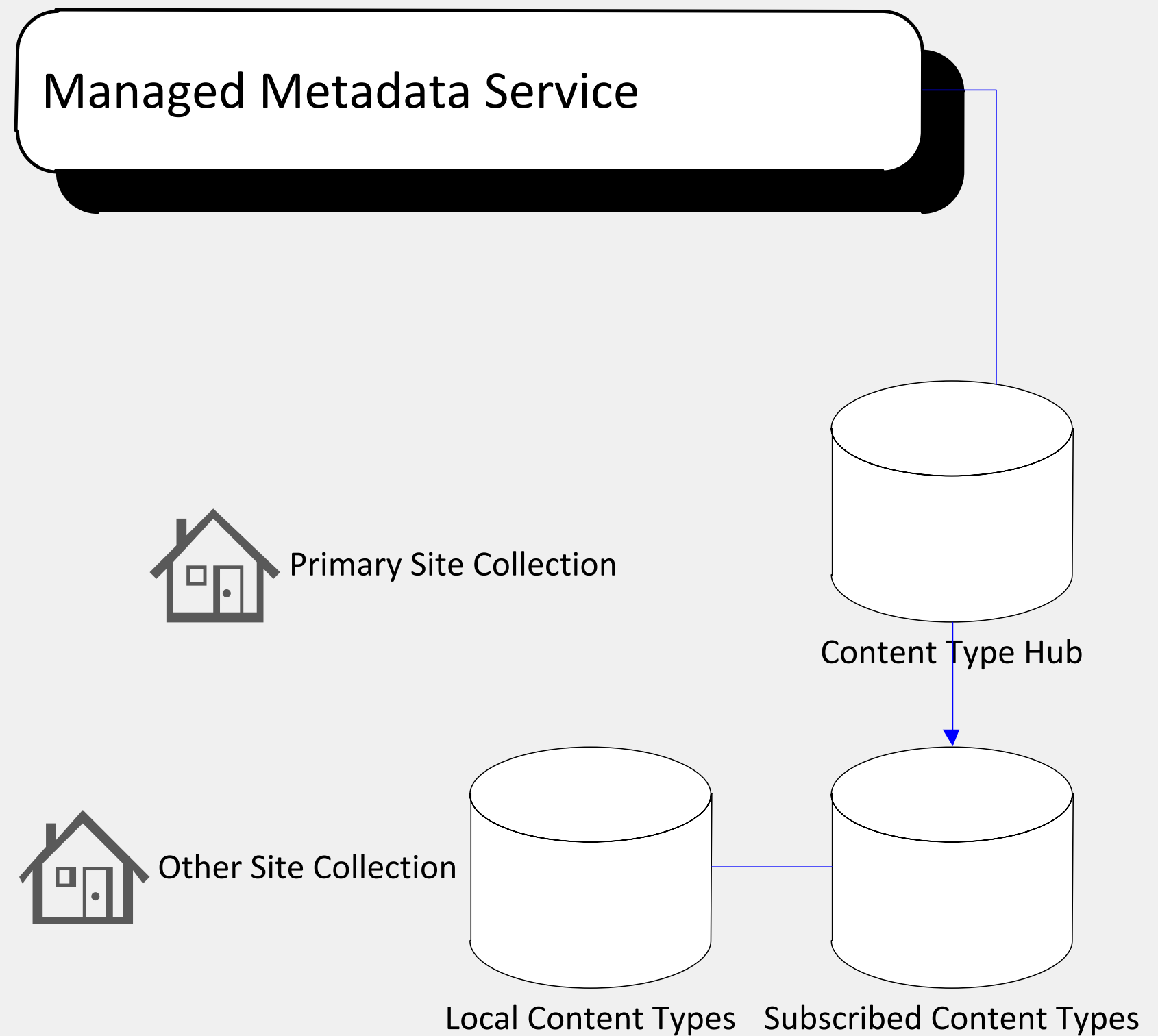
### Columns

Name	Type	Status	Source
Name	File	Required	Document
Title	Single line of text	Optional	Item
Product	Managed Metadata	Optional	

- Add from existing site columns
- Add from new site column
- Column order

# Content Type Hubs

- Master cloud site collection to house content types
- Publish and synchronize across multiple site collections





# Coordinate

# Coordinate and structure

## Organizing libraries and lists

- User-lead: custom columns, views, filtering, pinning
- IT-lead: shared taxonomy

## PowerApps for custom mobile experience

## Flow and LogicApps for workflow and process

## Group conversation and calendar

# SharePoint Managed Metadata

Centralized enterprise repository for tag hierarchies

Name \*  .docx

Title

Enterprise Keywords

Created at 8/2/2012 8:30 AM  
Last modified at 8/2/2012 8:30 AM

Suggestions

- SharePoint [Keywords]
- SharePoint BU [Department]
- None of the above.
-



# Hybrid taxonomy (FP1)

- Central cloud-based term store
- Implement timer service job in Feature Pack 1 to synchronize on premises term sets from cloud
- Content types remain separated

## Hybrid SharePoint Taxonomy (Preview)

This wizard simplifies the configuration of SharePoint hybrid environments by making the required changes in both SharePoint On-Premises and SharePoint Online.

Note, a small application will need to be installed in order to run the required tasks on your On-Premises environments.

[Click here to learn about Hybrid SharePoint Taxonomy scenario](#)

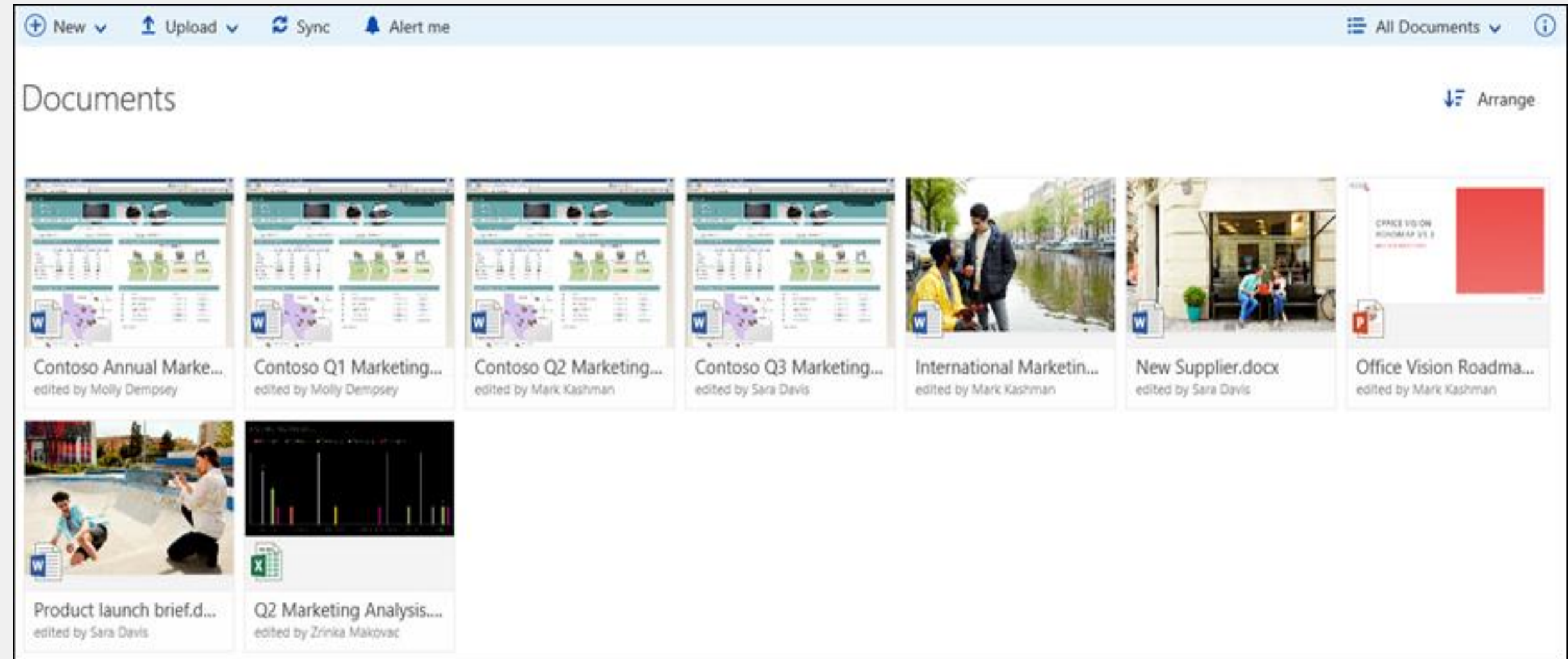
Next

Cancel

# Modern document libraries

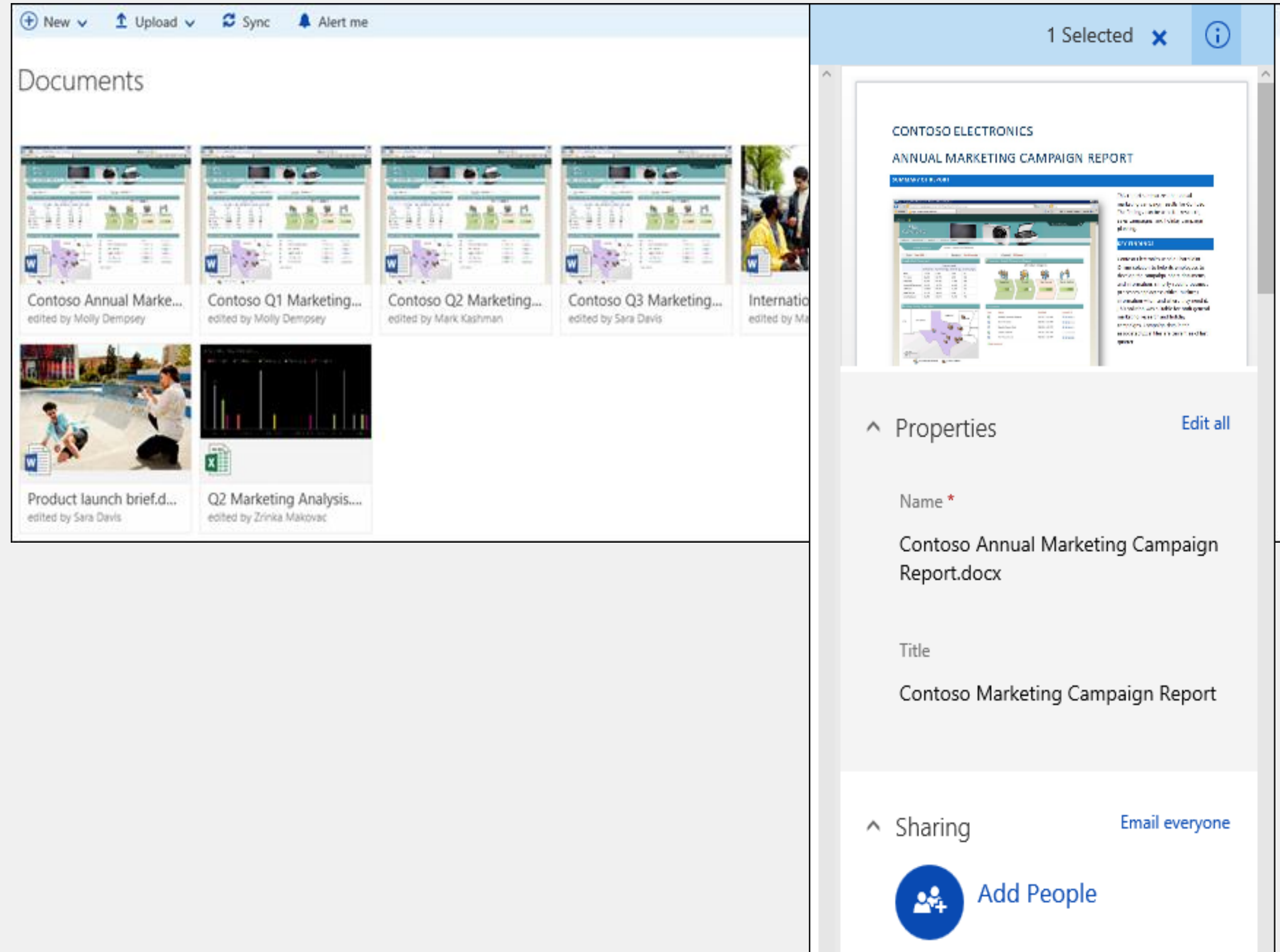
# Navigation and Information

- Modern, thumbnail-centric library view



# Navigation and Information

- Modern, thumbnail-centric library view
- Inline, contextual information panel



# Navigation and Information

- Modern, thumbnail-centric library view
- Inline, contextual information panel
- Simple move/copy gestures

The image displays two overlapping screenshots of a SharePoint library interface. The left screenshot shows a 'Copy' dialog box with the following content:

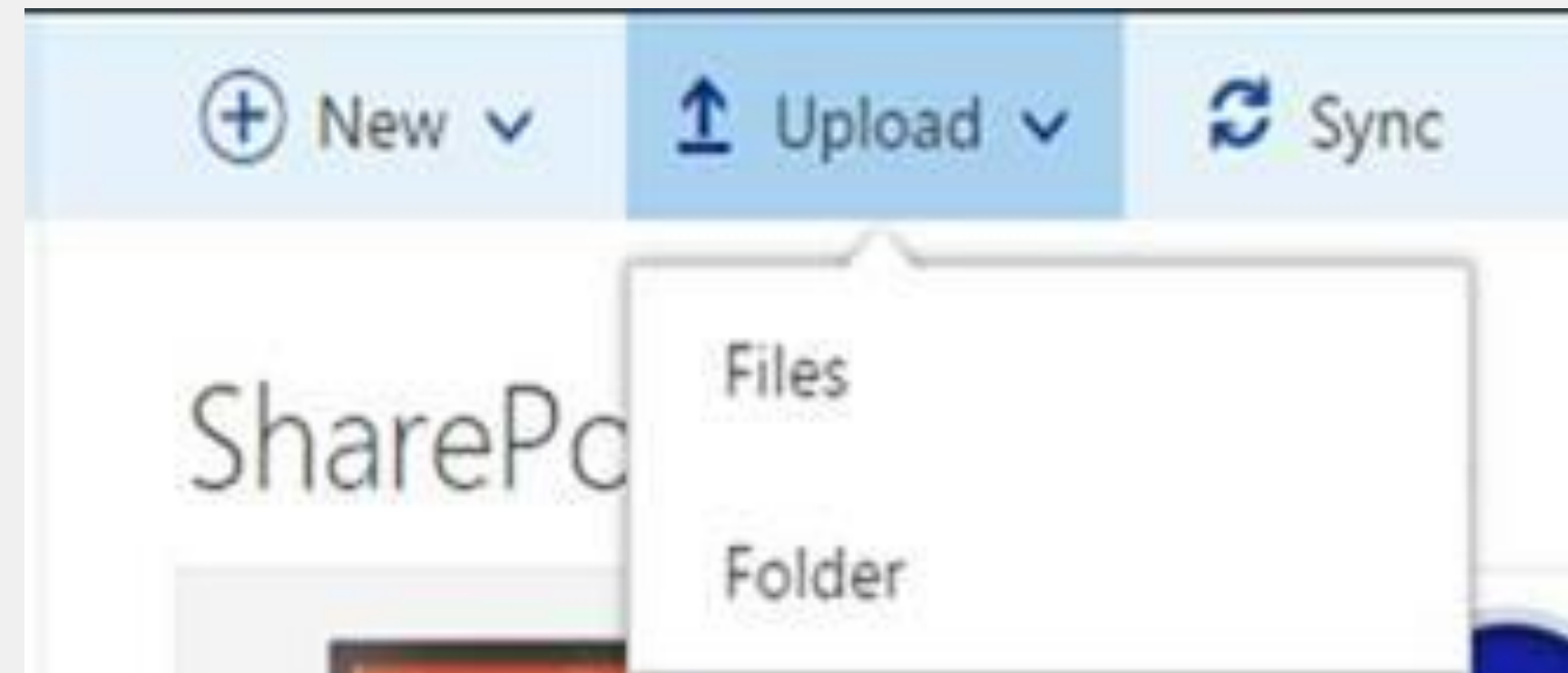
- Buttons: New, Upload, Sync, Alert me
- Buttons: Copy, New folder
- Text: SharePoint Ignite Decks is shared with 2 groups and 19 people.
- Section: Copy items to:
- Dropdown menu: SharePoint Ignite Decks
- List of folders:
  - ABC
  - Links List
  - New Folder Name
  - Jane folder
  - ATE Sessions
  - Pre Conference Sessions
  - Test DocSet

The right screenshot shows a contextual information panel for a selected document:

- Header: 1 Selected
- Document Name: CONTOSO ELECTRONICS ANNUAL MARKETING CAMPAIGN REPORT
- Thumbnail: A preview of the document content.
- Section: Properties [Edit all](#)
- Field: Name\*  
Value: Contoso Annual Marketing Campaign Report.docx
- Field: Title  
Value: Contoso Marketing Campaign Report
- Section: Sharing [Email everyone](#)
- Button: Add People

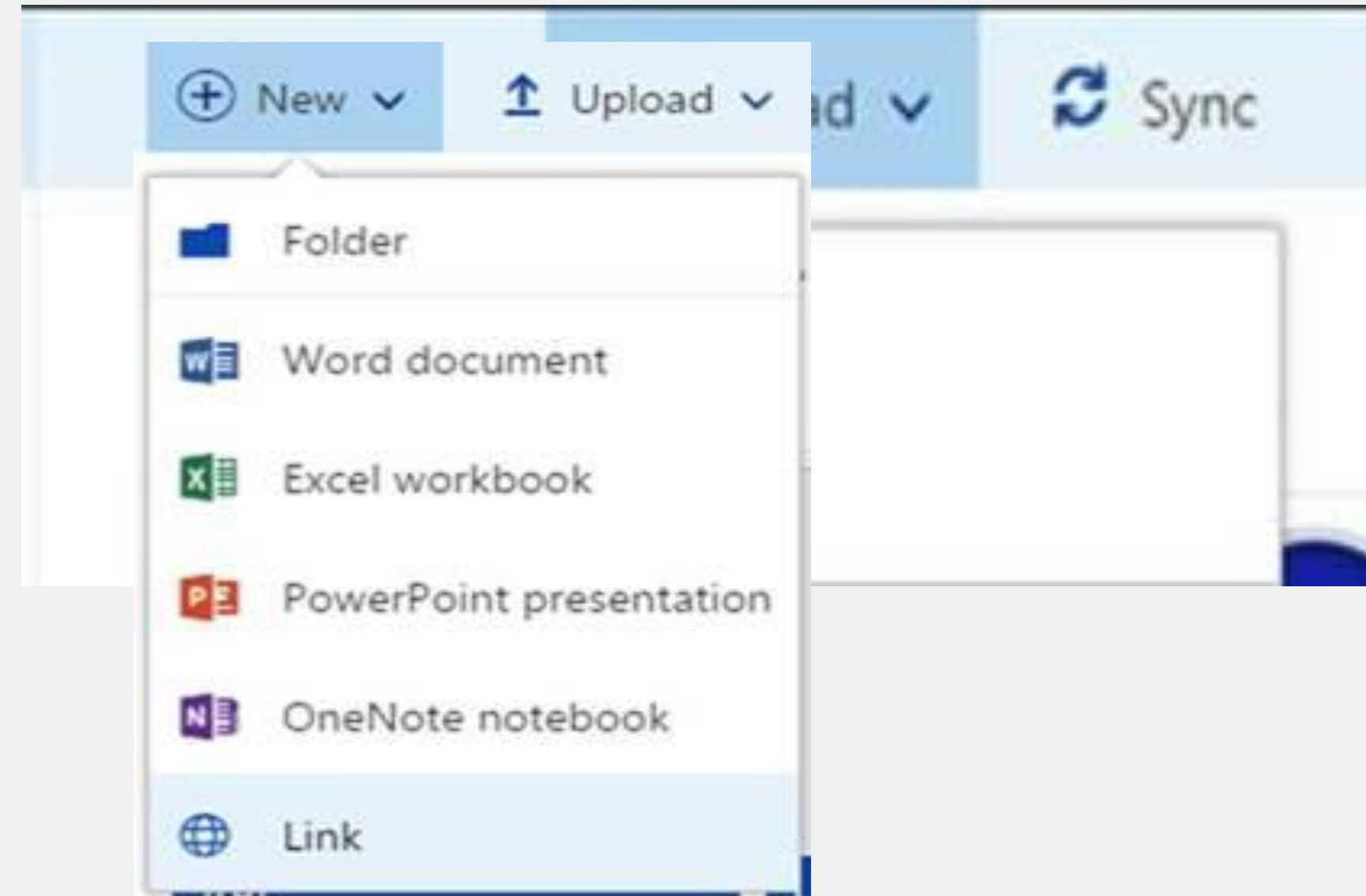
# Uploads and Metadata

- Upload or drag & drop existing files and folders



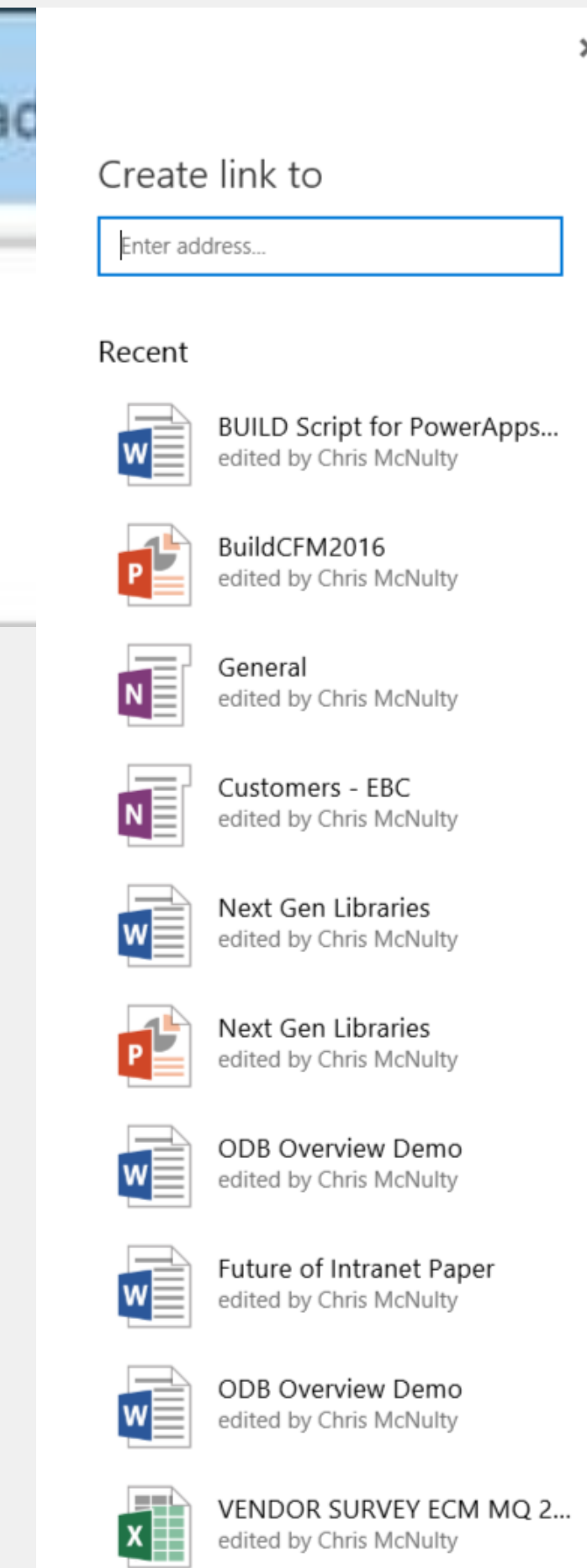
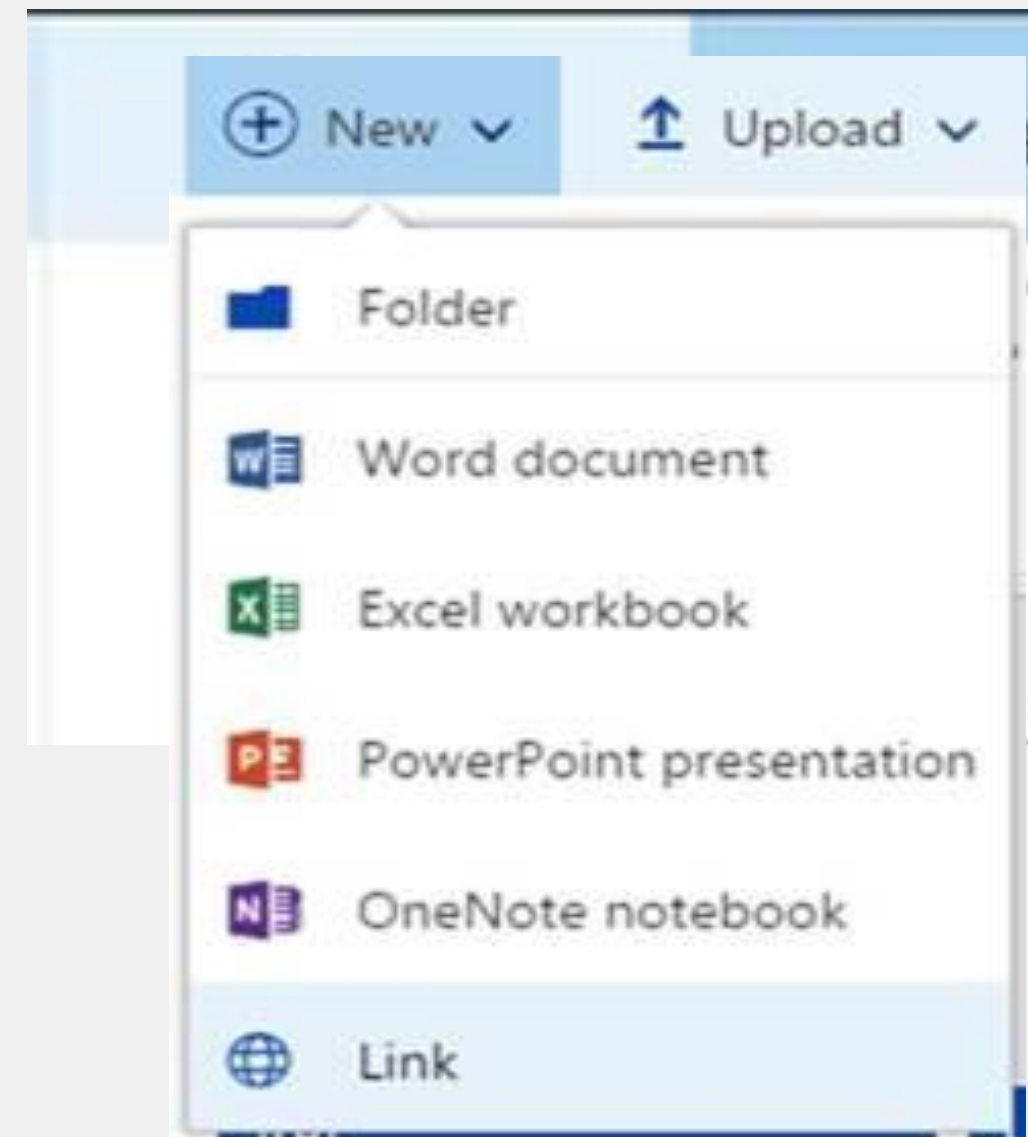
# Uploads and Metadata

- Upload or drag & drop existing files and folders
- Create new documents...



# Uploads and Metadata

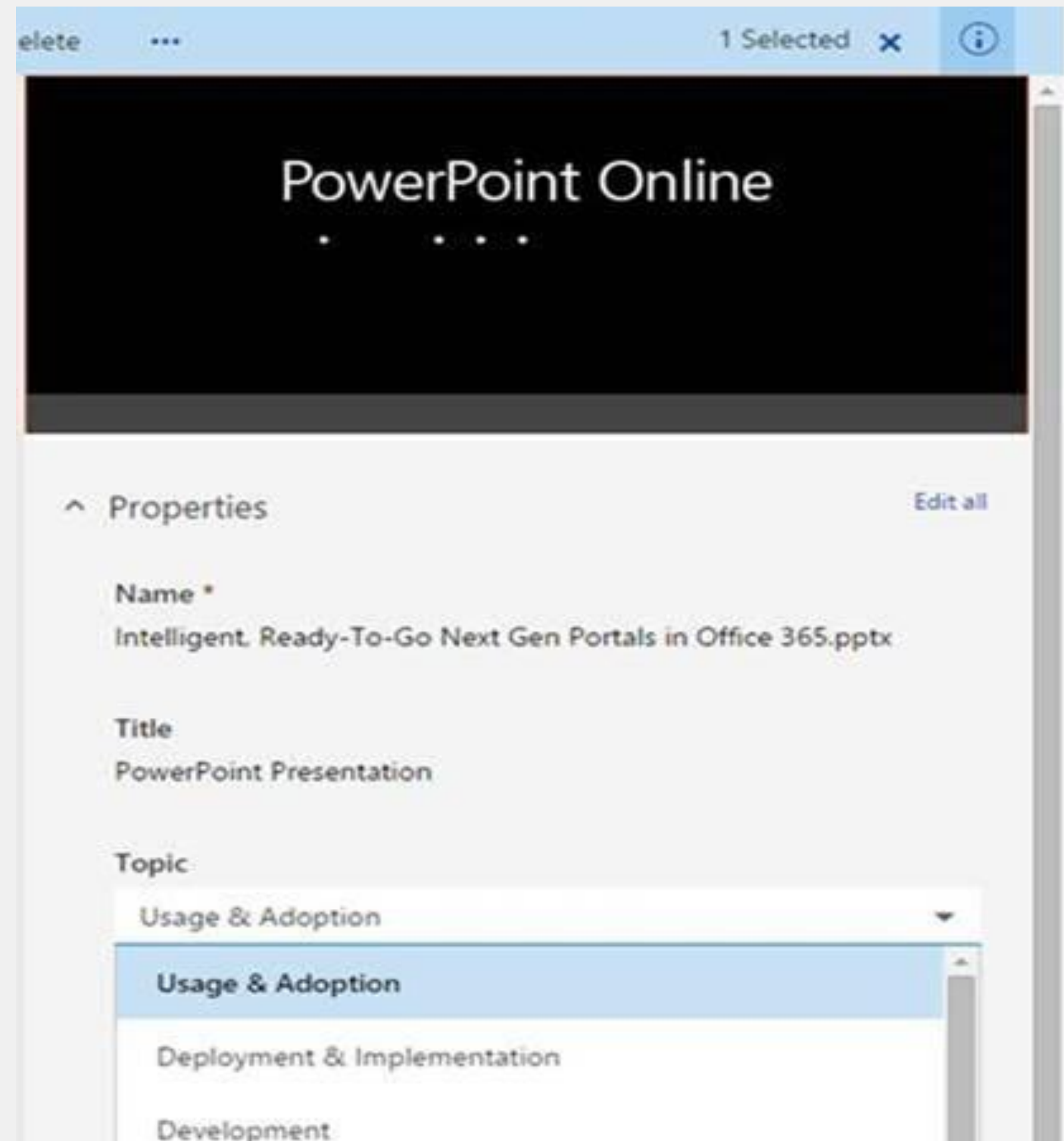
- Upload or drag & drop existing files and folders
- Create new documents...
- ...or link to existing ones





# Uploads and Metadata

- Upload or drag & drop existing files and folders
- Create new documents...
- ...or link to existing ones
- Edit metadata directly in information panel



# Flow for document management

- Connect to/from document libraries
- Route, alert, set actions based on process automation logic
- TIP: use extended properties to enable moving document attachments from email

The screenshot displays a Microsoft Flow automation workflow. The first step is a trigger named "When a new email arrives", which is connected to a Microsoft 365 account. Below the trigger, there is a "Comment" field with the placeholder text "Add a short comment" and a "Folder Path" field containing the value "Inbox". A "Show advanced options" dropdown is visible, and a connection status bar at the bottom indicates the flow is connected to "ChrisM@Contoso2016g.onmicrosoft.com".

The second step is an action named "Apply to each", which is connected to the "Attachments" output of the previous step. The "Select an output from previous steps" dropdown is set to "Attachments". Below this, there is a section for "You can insert data from previous steps..." with "Outputs from When a new email arrives" listed, including "Attachments".

The third step is an action named "Create file", which is connected to the "Attachments" output of the "Apply to each" step. The "Create file" action has several fields: "Site URL" (https://contoso2016g.sharepoint.com/sites/h/SitePages/Home.aspx), "Folder Path" (/Shared Documents), "File name" (Name), and "File Content" (Content). A context menu is open over the "File name" field, showing options: "Rename", "Add a comment", and "Delete". A connection status bar at the bottom indicates the flow is connected to "ChrisM@Contoso2016g.onmicrosoft.com".

# Protect



# Protect summary

## Platform security

- Physical and network security, customer lockbox, bring your own key

## Keeping content secure

- Conditional access, Azure Active Directory and InTune, external sharing controls
- DLP and rights management

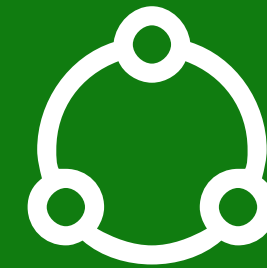
## Awareness and insight

- Auditing, reporting, alerting

## Information governance

- Retention
- eDiscovery
- ILM
- Records Management

# Core tenets



## PLATFORM SECURITY

Layered encryption and putting the customer in control of access and key management

## SECURE ACCESS AND SHARING

Manage access and sharing settings to ensure sensitive data doesn't leak

## AWARENESS AND INSIGHTS

Track account and file activity with full transparency with reports and alerts

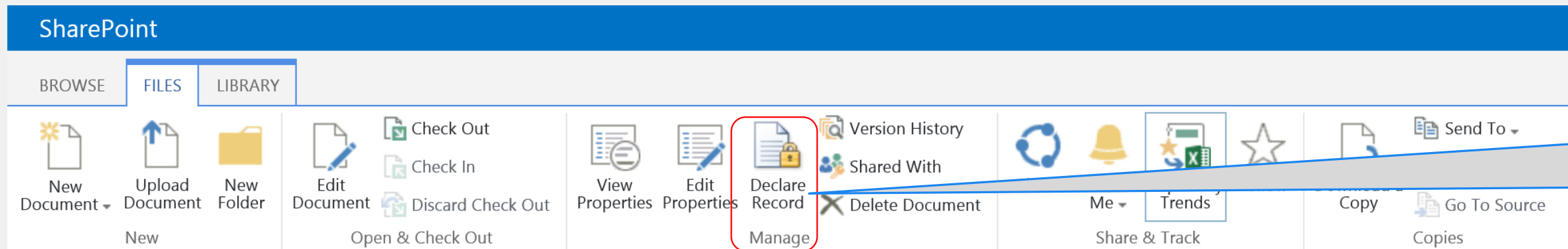
## INFORMATION GOVERNANCE

Govern your data retention, discovery, and deletion policies

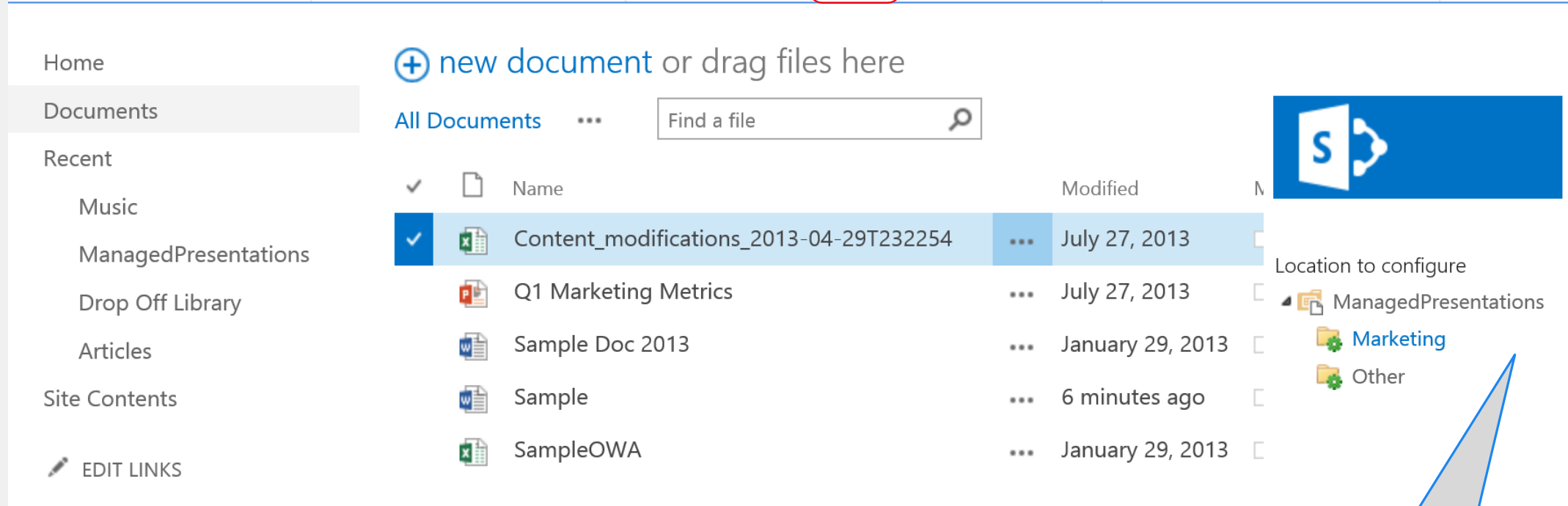
## COMPLIANCE AND TRUST

Continuous compliance, privacy, and transparency

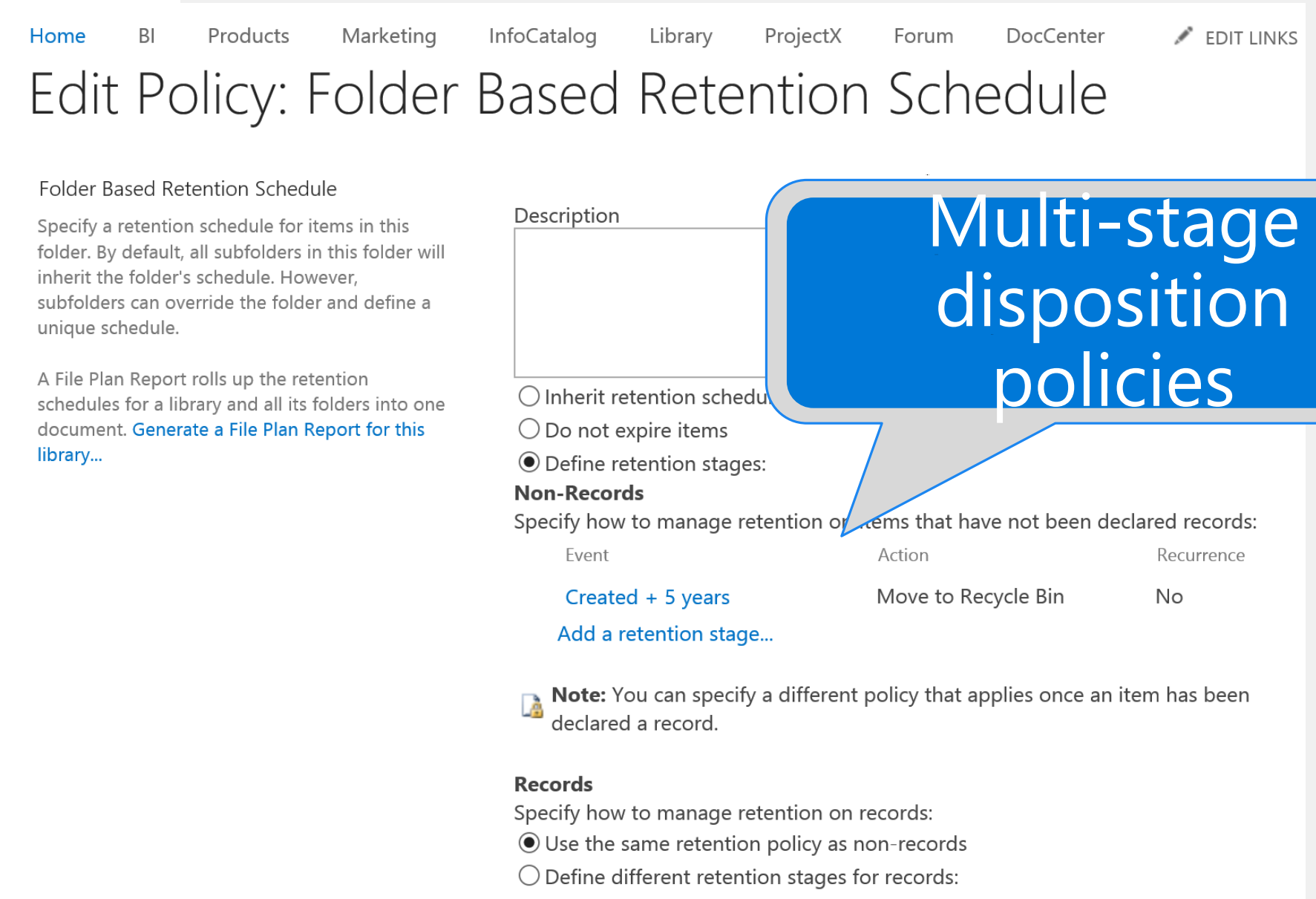
# Enterprise Records Management



Declare a record in a team site



Location-based policies



Multi-stage disposition policies

# Information Lifecycle Management

- Default behavior is defined for Content Types (MMS)
- Redefine (override) at library/folder level
- Rich array of functions and custom workflow

Stage properties -- Webpage Dialog

Specify the event that activates this stage and an action that should occur once the stage is activated.

**Event**

Specify what causes the stage to activate:

This stage is based off a date property on the item

Time Period: Created + years

Set by a custom retention formula installed on this server:

**Action**

When this stage is triggered, perform the following action:

Delete previous drafts

This action will delete all previous drafts of this document.

**Recurrence**

This stage will execute once according to the event defined above. Use recurrence to force the stage to repeat its action.

Repeat this stage's action until the next stage is activated

After the stage is first triggered, the stage's action will recur forever until the next stage is triggered.

Recurrence period: years

OK Cancel

# Content retention

The screenshot displays the Office 365 Security & Compliance center interface. The top navigation bar includes the Office 365 logo, the text "Office 365", and "Security & Compliance". On the right side of the top bar are icons for notifications (with a '2'), settings, help, and a user profile. A search bar is located below the top bar with the placeholder text "Search for users or alerts".

The left-hand navigation pane contains the following items:

- Home
- Alerts
- Classifications
- Dashboard
- Data loss prevention
- Threat management
- Data governance
- Search & investigation

The main content area is titled "Home > Tags library". It features two buttons: "+ Create new tag" and "Refresh". Below these buttons is a table with the following columns: Name, Created by, Retention period, and Modified date.

<input type="checkbox"/>	Name	Created by	Retention period	Modified date
<input type="checkbox"/>	Intermediate	TEST_TEST_SPOProvHe...	5 years	Sep 15, 2016
<input type="checkbox"/>	Long-term	TEST_TEST_SPOProvHe...	20 years	Sep 15, 2016
<input type="checkbox"/>	Temporary	TEST_TEST_SPOProvHe...	1 year	Sep 15, 2016



# Content retention







Office 365 | Security & Compliance

Search for users or alerts

Policy name  Save Cancel

Locations applied

Policy properties

Status	Name	Inclusion	Exclusion
<input checked="" type="checkbox"/>	 Exchange Mailboxes	1 mailbox <a href="#">Include</a>	<b>exclude</b> <a href="#">Exclude</a>
<input checked="" type="checkbox"/>	 Sharepoint Sites	2 sites <a href="#">Include</a>	<b>exclude</b> <a href="#">Exclude</a>
<input checked="" type="checkbox"/>	 OneDrive For Business	1 people <a href="#">Include</a>	<b>exclude</b> <a href="#">Exclude</a>
<input type="checkbox"/>	 Groups (mailboxes & sites)		
<input type="checkbox"/>	 Skype For Business		
<input type="checkbox"/>	 Exchange Public Folders		

# Content retention

The image shows two overlapping screenshots from the Office 365 Security & Compliance center. The background screenshot shows the OneDrive interface with a file named 'DocumentDemo.txt' selected. The foreground screenshot shows a 'Policy name' configuration window with a search bar and 'Save' and 'Cancel' buttons. The 'Policy properties' section is visible, showing 'Locations applied' and 'Policy properties'.

**Office 365 Security & Compliance Center**

Search for users or alerts

Policy name: [ ] Save Cancel

Locations applied

Policy properties

**OneDrive**

Search [ ] Share Get a link Download Delete 1 selected

Files

Name	Modified
DocumentDemo.txt	12 minutes ago
SSNSample_Book.xlsx	August 26
SSNSample_Word.docx	August 26

Drag files here to upload

Properties

Apply protection tag

- None (selected) - Clear the protection tag.
- Temporary - Retention for 365 days based on creation date.
- Intermediate - Retention for 1825 days based on creation date.
- Long-term

# eDiscovery and legal hold

- Find, preserve, analyze, and package data for legal investigation
- Delegate to specialists such as compliance or HR
- Single experience across Office 365
- All background processing

Office 365 Security & Compliance

Home > eDiscovery

## eDiscovery

After creating an eDiscovery case and choosing who has access to it, use the case to search for email, documents, Skype for Business conversations, and other content in your organization. You can then preserve the content and export the search results for further analysis.

You can also prepare search results for more detailed analysis in Advanced eDiscovery.

We have a new case management, hold, search, and export experience for you to try. Create a case to check it out.

Looking for your old cases? Go to the eDiscovery Center in SharePoint.

Case name	Status	Last modified	Modified by
Contoso Audit	Active	9/22/2016 6:58 PM	Peter Kwan

Contoso Audit

Compliance Case - Internet Explorer - [InPrivate]

https://protection.office.com/Ucc/eDiscovery/EditComplianceCase.aspx?ActivityCorrelationID=9dc5689f-a48a-8d3c-0bf

Contoso Audit

Details

Holds

Name	Last modified	Status	Mailboxes	Sites
Audit Hold	9/23/2016 9:40 AM	Turning on	1	1

Audit Hold

1 mailbox  
1 site

(Search in progress)  
Update statistics

Last modified 9/23/2016 9:40 AM  
Last modified by Peter Kwan

Turning on  
Turn it off

1 selected of 1 total

# Protecting sensitive information with DLP



Identify



Monitor



Protect



End user  
education

## MANAGE DATA LOSS PROTECTION POLICIES ACROSS O365 WORKLOADS

One policy definition independent of workload

One policy lifecycle

One set of sensitive type definitions

Custom classifications (preview)

New DLP Policy from template

Import DLP Policy

Policy tips in Office, web, OneDrive apps

# Policy tips in SharePoint and OneDrive apps

The screenshot shows the OneDrive web interface. At the top, there's a navigation bar with the OneDrive logo and various icons. Below that, a toolbar contains actions like 'Open', 'Share link', 'Get link', 'Download', and 'Delete'. The main area displays a list of files and folders. A dialog box is overlaid on the file list, providing details about a policy tip for a document named 'Financial Information.docx'.

Name	Modified	Modified By
Business Data		
Notebooks		
Office Lens		
Project Falcon		
Q3 Financials		
Contoso Active Fisc		
Contoso Marketing		
Financial Informatio		
IE5A4790.psd		
IE5A4809.ai		
IE5A4828.psd		
IE5A4844.ai	September 15	Jeremy Mazner
Jeremy @ Contoso	4 days ago	Jeremy Mazner
Loyalty Program Meetup.eml	September 19	Jeremy Mazner
New Products Pricing.pptx	September 18	Jeremy Mazner

### Policy tip for 'Financial Information.docx'

This item conflicts with a policy in your organization.

[Open the item](#) to fix the issues or click **Resolve** to override the policy or report a problem.

**Issues**

- Item contains the following sensitive information: U.S. Social Security Number (SSN)

Last scanned: 3 days ago

**Resolve** **Close**

The screenshot shows the OneDrive mobile app interface. It displays a 'Policy tip' screen with a 'Details' section and a list of actions. The 'Details' section includes a red prohibition icon, a title 'Check this item for the following issues:', and a list of sensitive information: 'U.S. Social Security Number (SSN)'. It also shows the last scanned date as 'May 6, 2016'. Below this, there are three main actions: 'Override the policy', 'Report an issue', and 'View policy tip'. The 'View policy tip' action is highlighted with a red background.

## Policy tip

**Check this item for the following issues:**

Item contains the following sensitive information: U.S. Social Security Number (SSN)

Last scanned: May 6, 2016  
If you changed the item after this time, these conflicts might not apply

**Override the policy**  
Your decision might be reviewed later by your admin

**Report an issue**  
Think this item doesn't conflict with your organization's policies?

**View policy tip**  
This item conflicts with your organization's policy

Keep offline

Type  
Size  
Created  
Modified

# Closing thoughts



# Best practices

- Minimize ECM in default libraries
  - Common repository across the suite
  - Create new libraries
- Reuse common fields as site columns
- Do not overwrite default content types
- Minimize MMS complex pinning, reuse if hybrid is on roadmap
- Strategize use of hub-based content types (don't overdo)





# The IT Balancing Act

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Worker Expectations



Enterprise Requirements

# The IT Balancing Act

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## Worker Expectations

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Work from anywhere

Unified view into content

Use own devices (BYOD)

Simplicity



# The IT Balancing Act

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## Enterprise Requirements

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Manage mobile records



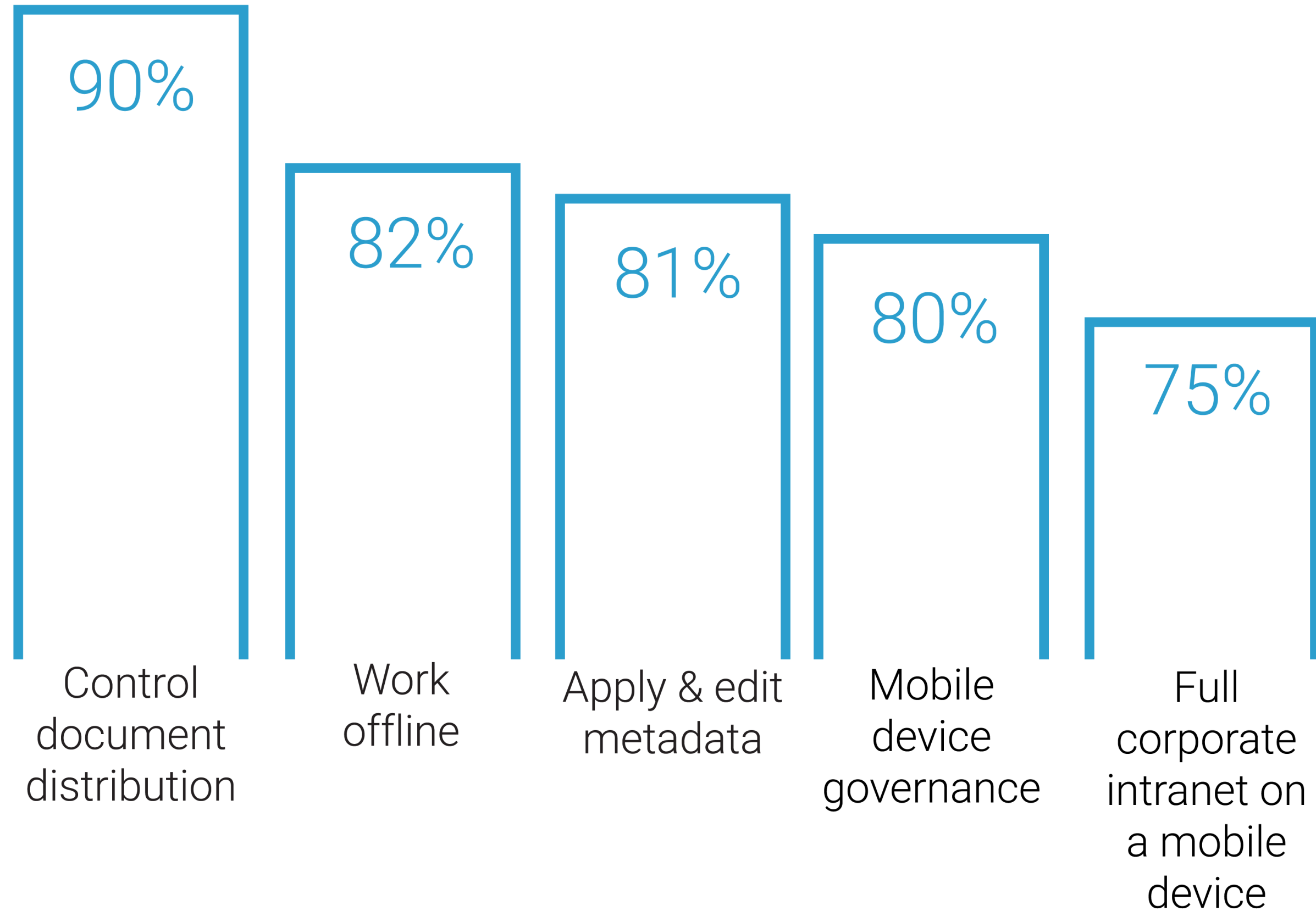
Prevent data loss

Meet compliance

Content in SharePoint & Office 365

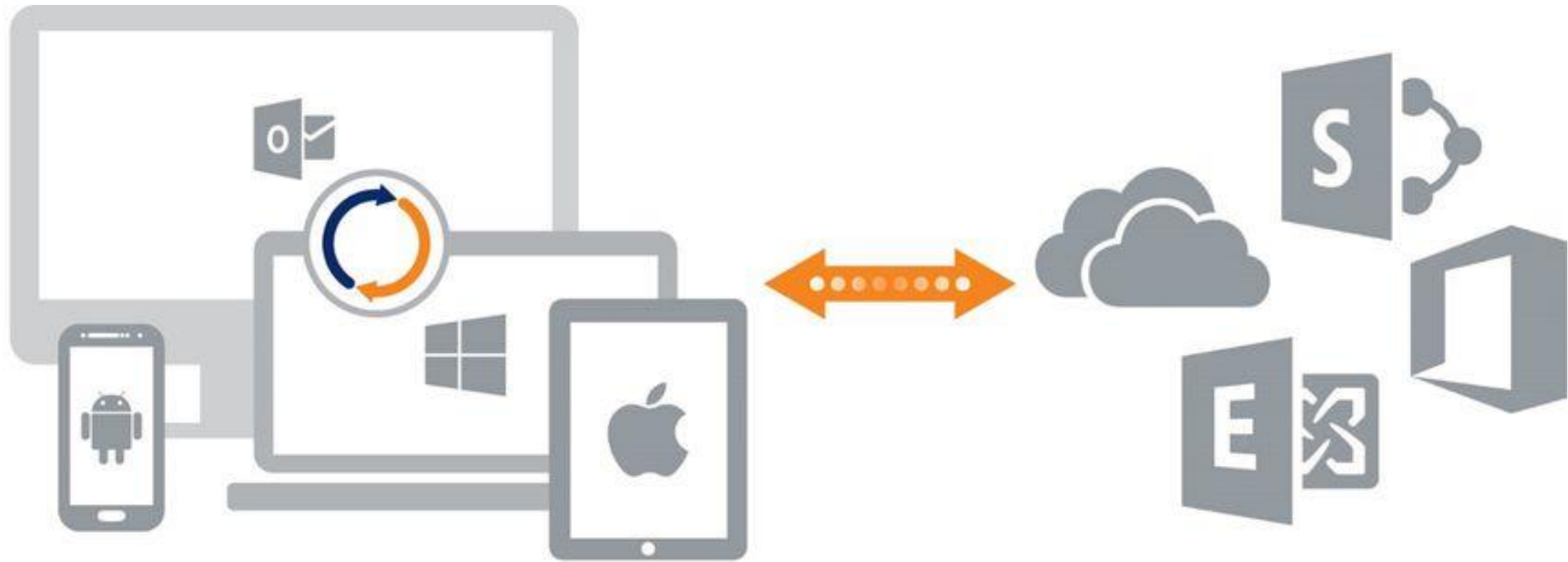
# Most Useful Capabilities for Mobile Apps for SharePoint

AIIM SharePoint Industry Watch Report, August 2016



# Colligo Engage 2016

Content Hub for the Digital Workplace



Colligo Apps

# Colligo Engage 2016

Content Hub for the Digital Workplace





# Flight Directors Deliver Award-Winning On-Flight Service

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One-stop-shop for all crew information

Mobile metadata speeds findability

Offline access in flight, hotels & shuttle

Electronic manuals meet compliance

# Distributed Materials & Pricing to iPads Enable Sales Anywhere

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Improved ECM with SharePoint

Central control over content distribution

Up-to-date regional pricing & inventory

Offline sale enablement anytime, anywhere







# Aerospace & Defense Company Keeps Mobile Content Secure

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Offline access in remote environments

Multi-factor authentication

Central mobile policy deployment

Tracking, reporting & analytics

# Mobile Productivity Requirements

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Optimized with Colligo



- Create, Share & Discover SharePoint Content
- “Single Pane of Glass” for Server & Online
- Offline Access, Editing & Authoring
- Editing of Content Through Native Applications
- Engaging Apps that Drive Instant Adoption

# Information Governance Requirements

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Made Mobile with Colligo



- Mobile Records Management Across Devices
- Content Type Selection to Apply Retention Policies
- Managed Metadata Application for Content Classification
- Push Content & Policies to Devices
- Reporting & Analytics on User Activities

# Security Requirements

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- AD & Sophisticated Multi-Factor Authentication
- Remote Wipe, Blacklist, Disable “Open In” & Printing
- Audit Trail Aids Data Loss Prevention & Identification
- Passcode Enabled with Automatic Data Deletion
- Encryption In Transit & At Rest



# Colligo Engage 2016

Mobilize:



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Questions?



SharePoint Pro