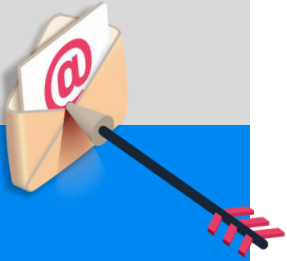


2019

SharePoint Surgery

5 Perils of Over-Retention:
What You Need to Know





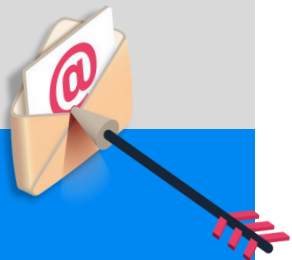
Richard Poole

CTO EMEA

 richardp@harmon.ie

 @rtpoole

 <https://uk.linkedin.com/in/richard-poole-55a572>



Email Management



Your business runs on email
“Emails You Must Find”

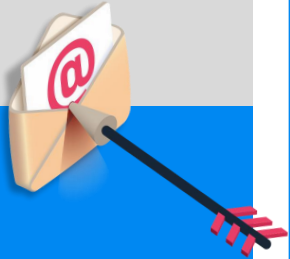


ROT* emails

Important business emails

Email records



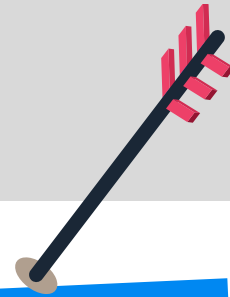
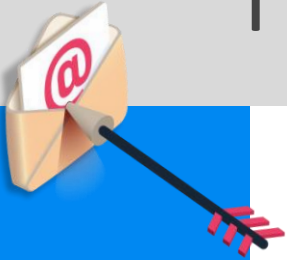


Poll Question #1

How do you currently (or plan to) store important business emails and email records?

- In SharePoint
- In Exchange
- With Microsoft Teams
- Another document management system
- We're looking for a new solution

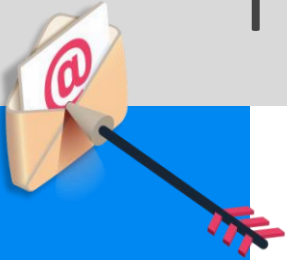
Peril #1



Expecting **Someone** Else to Dictate Records Policies

- Compliance managers can't know what business units need to save/classify
- Tension between compliance managers (delete everything) and business managers (keep everything)

Peril #2



Over Complicating the Solution

- Make the right thing the easy thing, so people will do the right thing
- Focus on the user not just the policy



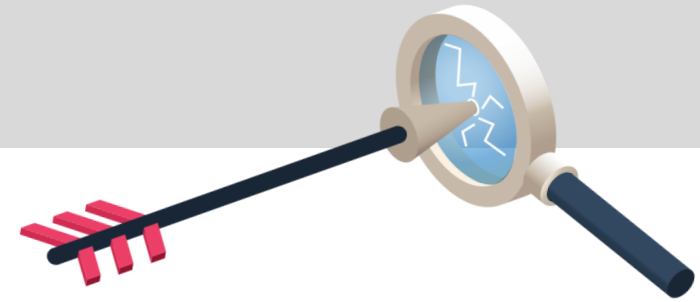
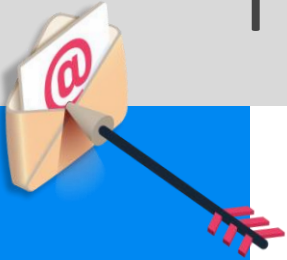
The screenshot displays the Microsoft Office 365 interface. On the left, the email client shows a list of messages. The selected email is from Fred Neal, dated Tue 1/2/2018 3:35 PM, with the subject 'Contract'. The email body contains the text: 'Hi Annie, Please edit the contract. Thanks, Fred'. On the right, the SharePoint document library for 'harmon.ie' is shown, displaying a list of documents. The document '2018 Contract.docx' is highlighted, showing it was modified on 5/30/201... by Fred Neal. A blue arrow points from the email to the document.

Name	Modified	Modified By	Project Name	Relevance
Project Name : Alpha (9)				
Commercial Report.docx	5/2/2018...	Annie Tuck	Alpha	AF
Draft proposal_2015-08-19_09-06-1	7/16/201...	Fred Neal	Alpha	EM
EULAs_2010-08-08_07-52-25_Ange	7/16/201...	Fred Neal	Alpha	EM
Integration Project - Requirement	5/30/201...	Fred Neal	Alpha	EM
2018 Contract.docx	5/30/201...	Fred Neal	Alpha	EM
On the Road_2016-08-08-07-44-45	7/16/201...	Fred Neal	Alpha	EM
Procurement Process.docx	7/10/201...	Fred Neal	Alpha	EM
Standard Affiliate Partner Agreeem	5/30/201...	Fred Neal	Alpha	EM
Technical Documentation.docx	6/15/201...	Annie Tuck	Alpha	EM
Project Name : BearingPoint (2)				
Project Name : Citi (4)				
casccsccal 12-14-2016.JPG	5/2/2018...	Annie Tuck	Citi	US
collageZendesk_auth.PNG	5/2/2018...	Annie Tuck	Citi	US
Customer Support Datasheet 2006	5/3/2018...	Annie Tuck	Citi	US
Dexus.docx	5/2/2018...	Annie Tuck	Citi	US
Project Name : CononoPhillips (3)				
55694_001.pdf	5/2/2018...	Annie Tuck	CononoPhillips	US
Accide nt xyz.docx	5/2/2018...	Annie Tuck	CononoPhillips	US
Agency contract Beta2.docx	5/2/2018...	Annie Tuck	CononoPhillips	US
Project Name : Continental (2)				
Contact List.xlsx	5/16/201...	Fred Neal	Continental	US
Continue pilot notes.JPG	5/3/2018...	Annie Tuck	Continental	EM
Project Name : EY (6)				
Agency contract.pdf	5/8/2018...	Annie Tuck	EY	EM
andy1.JPG	5/2/2018...	Annie Tuck	EY	EM
andy2.JPG	5/2/2018...	Annie Tuck	EY	EM
Community Initiative_2010-08-08	7/16/201...	Fred Neal	EY	EM
Customized Environment_2010-08	7/16/201...	Fred Neal	EY	EM
printable-brochure.pdf	6/20/201...	Fred Neal	EY	EM
Project Name : SwissRe (10)				

Make the Right Thing the Easy Thing

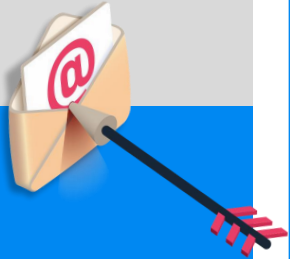
- Capture email and document records
- Specify retention and descriptive policies in one step

Peril #3



Losing Connection Between Related Records

- How do you see connected emails, documents, conversations when they are all stored in different apps?
- Over-focusing on where an item is stored.

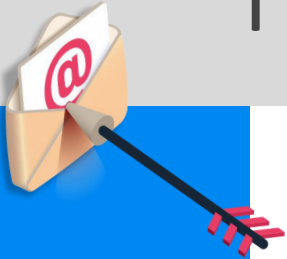


Poll Question #2

Do you use Microsoft labels to apply retention policies?

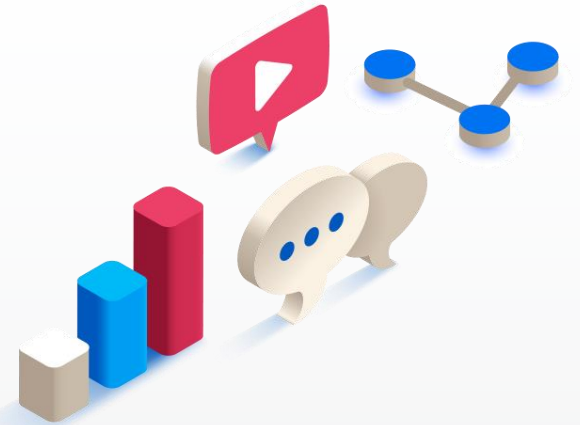
- Yes, 'in-place' – emails in Exchange, documents in SharePoint
- Yes, - emails and documents in SharePoint
- Yes, but only for emails in Exchange
- Yes, but only for documents in SharePoint
- No

Peril #4

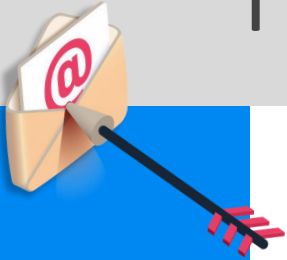


Taking on Too Much at Once

- Segment organization by logical group
 - Start small and prove the solution works
- Segment content by order of priority
 - Start with email...
 - Then documents...
 - Then Teams conversations and other stuff



Peril #5



Not Being Able to Respond Quickly

- If information is not classified in a uniform manner and it is stored across multiple apps, you will find it very hard to locate the information later.
- When information is stored 'in place,' you lose the connectivity between related emails, documents, and conversations.

Drag-and-Drop Emails and Documents to Microsoft Teams Channels



- Emails are stored in Exchange
- Documents are stored in SharePoint
- Conversations are stored in Teams

SmartAssistant

WW Sales Team

General

Competitive Analysis

Paris Sales Meeting

Weekly Scrum

3 hidden channels

harmon.ie Management

General

2019 Sales Meeting

3 Year Growth Plan

Topics Early Adopters

General

Candidates



Assign Descriptive Labels to Emails

Assign descriptive labels to emails and documents (based on the SharePoint metadata terms and values)

The screenshot shows an Office 365 email interface. The email is from Fred Neal to Annie Tucker, dated Tue 1/2/2018 3:35 PM. The subject is 'Contract'. The body contains the text 'Hi Annie, Please edit the contract. Thanks, Fred'. A document attachment is visible: '2018 Contract.docx' (32 KB). The SmartAssistant panel on the right is titled 'SmartAssistant' and displays the following labels:

- Descriptive Labels**
 - Account Name**: Omega Sales Initiative
 - Opportunity Name**: 2019 Migration Project
 - Department Name**: Compliance and Legal
 - Project Stage**: Pilot and Evaluation
- Retention Label**: Contracts
- Sensitivity Label**: Private

Specify Office 365 Descriptive labels

Find Related Information



11/10/2018

Kathleen Banks | Deborah Dawson; Angela Nelson

Migration Project Meeting Summary

arrangements.xlsx
22 KB

Angela,
Thank you very much for your email about the Migration Project. I will need you to work on the staffing and the Real Property assets in the next few weeks. Remember that your work is critical for the TBS Workspace projects.

Also, I want to make sure we are set with all the TBS IT requirements and TBS Workspace needs. As the project is progressing quickly, I want to make sure we don't run out of time with all the arrangements.

Sincerely,
Annie
Migration Project Coordinator
Tel: +1.800.555.1212
Email: anniet@logjamtours.com
Email: anniet@logjamtours.com

Discover more about...

Migration Project Summary.eml
Email by Angela Nelson on 11 Apr, 2019 | 6:52

2019 Migration Project | Omega Sales Initiative

Project Migration Status | Compliance and Legal

All | [Icons]

Today

- Migration 2019 status
- Planning meeting update
- Task force agenda 6/19

Older

- Pilot plan
- Offsite training agenda
- Pilot B Reboot
- Migration Checklist and Timeline
- Pilot summary
- Planning Meeting next week

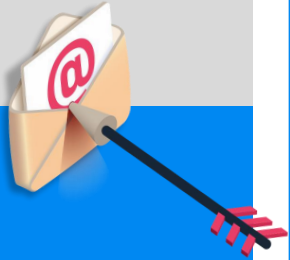
Descriptive labels assigned to email

Emails and documents with same Descriptive label values

HARMON.IE @ HILTON – A CASE STUDY IN EMAIL RECORDS MANAGEMENT

- “harmon.ie gave us the ability to preserve records in an efficient and user-friendly way...”
- “...we wanted everything in one interface and harmon.ie was able to do that for us...”
- “...With harmon.ie, we were able to successfully preserve 40,000 records...and delete over 35 million emails”





Poll Question #3

Would you like to be contacted
by a harmon.ie representative?

