

Showcase:

Enterprise Information Management in SharePoint 2016

E-Records Conference 2016 – Austin, TX

At the Intersection of Technology and Records Management

November 4, 2016

Introductions



SharePoint
Guy

Director of Professional Services
DataPoint Solutions

6+ years
SharePoint experience



jdausey



@jdausey

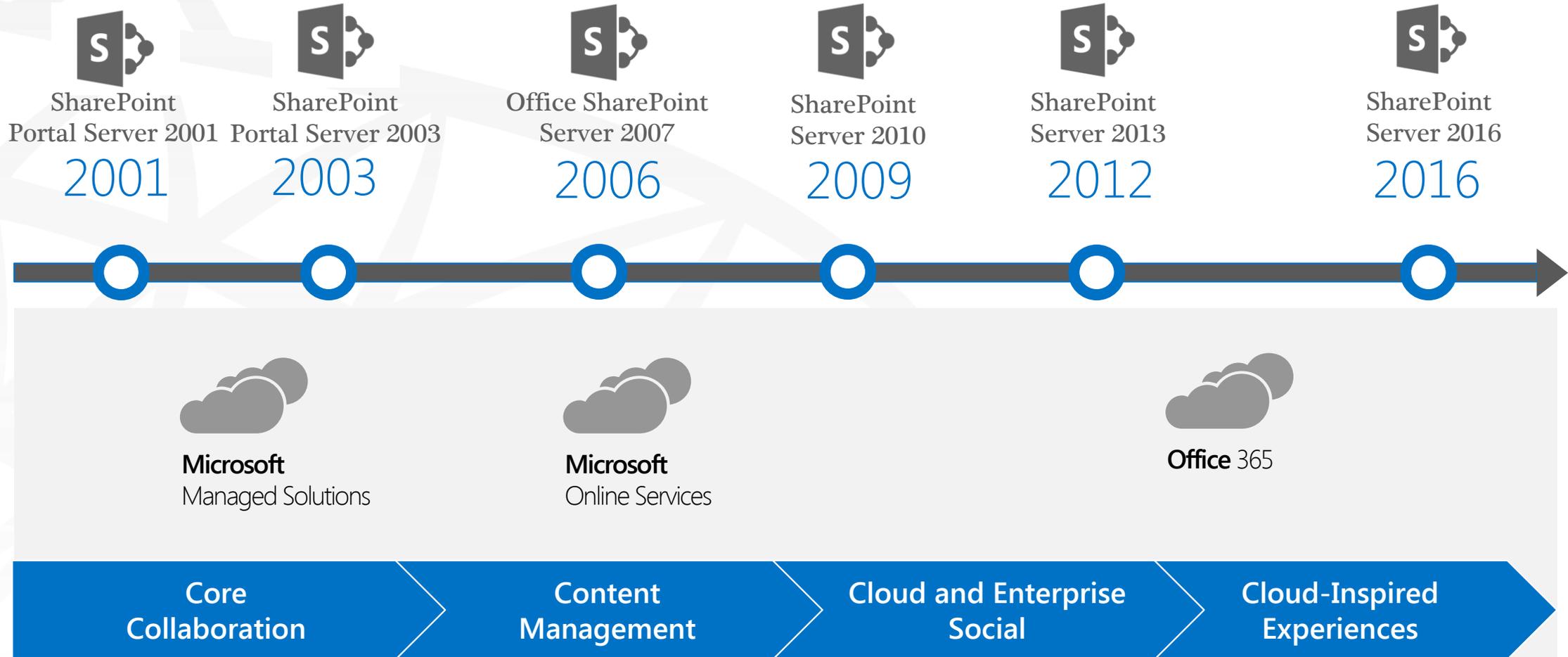
MCP

SharePoint 2007, Configuring
SharePoint 2010, Configuring
SP 2013 Core, Development
Server Virtualization w Hyper-V

Datapointconsulting.com



SharePoint Backstory



Reference: Microsoft.com

SharePoint Server 2016 Vision & Value

Modernize the on-premises infrastructure improving speed, scale, and user experiences. SharePoint Server 2016 brings cloud innovation to your datacenter so you can get the best of both worlds – speed and productivity for your users with flexibility and control for IT.

Improved User Experiences

- New user experiences enable users to quickly and productively consume new apps and experiences across devices and screens.

Cloud-Inspired Infrastructure

- Based on our learning from Office 365, SharePoint 2016 delivers a reliable software-defined infrastructure foundation that's proven at scale with best in class hybrid experiences.

People-Centric Compliance

- Integrated data-loss prevention and protection and with built-in and cloud connected compliance, security, and threat protection for both administrators and end users.

Reference: Microsoft.com

SharePoint 2016 Areas of Concentration

Experiences



- Modern collaboration
- Personalized insights
- file storage and collaboration

Infrastructure



- Improved performance and reliability
- Hybrid cloud with global reach
- Support and monitoring tools

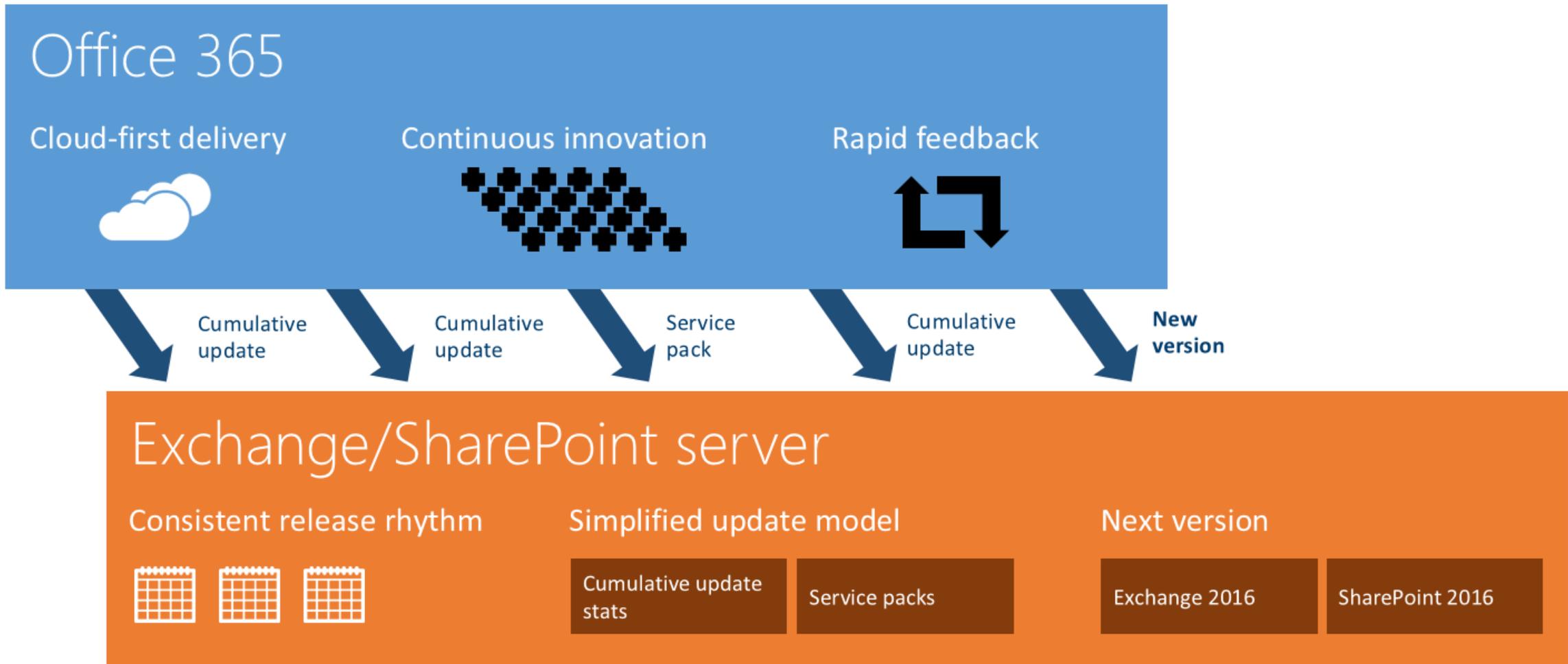
Compliance



- New data protection and monitoring tools
- Trusted platform

Reference: Microsoft.com

Hybrid Deployment



Reference: Microsoft.com

Why does this matter?

Information explosion

In next decade, mankind's **data will increase 44 times**¹, while the number of **IT professionals will grow by only 1.4 times**... in the next year alone, there will be more data generated than in all of mankind's history

87%

Of senior managers admit to regularly uploading work files to a personal email or cloud account²

58%

Have accidentally sent sensitive information to the wrong person³

¹<http://www.itpro.co.uk/622942/idc-data-explosion-goes-into-the-zettabytes>

²Siroz Friedberg, "On The Pulse: Information Security In American Businesses," 2013

³HIPPA Secure Now, "A look at the cost of healthcare data breaches," Art Gross, March 30, 2012

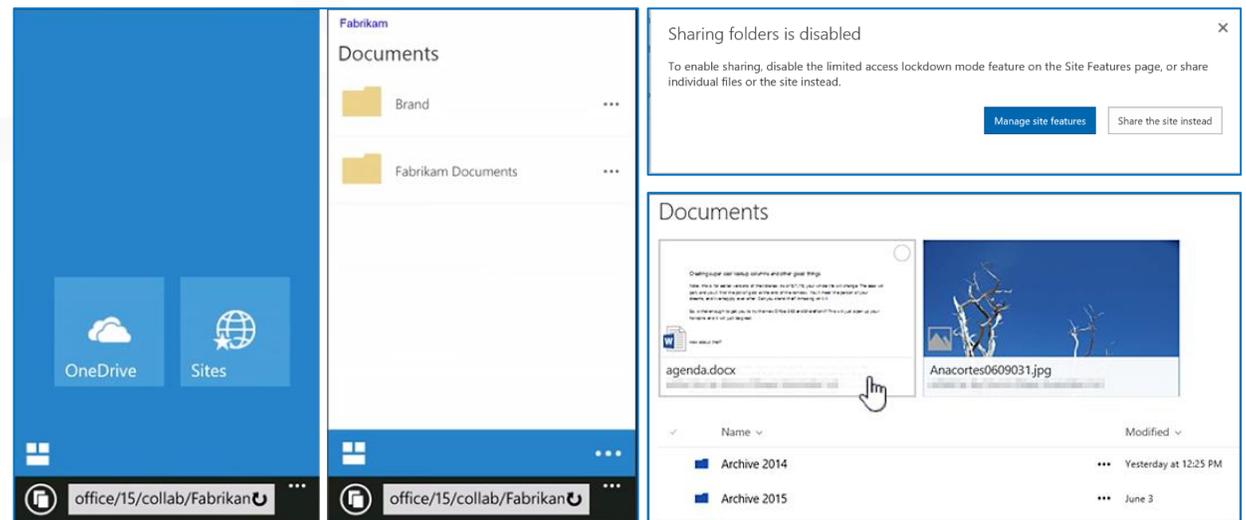
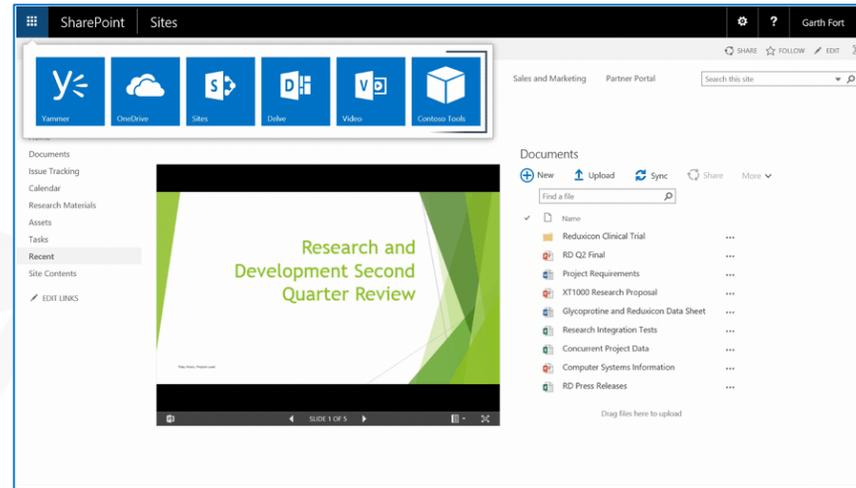
Information Architecture

Enterprise information is no longer just documents, in SharePoint there are ways to achieve success across all mediums of information

Web Pages and Sites	Content Types	Search
Metadata Columns	Modern Sites	OneDrive for Business
Folders	Integration Systems	SharePoint Libraries / Lists

SharePoint UI Improvements

- Hybrid Sites
- Site Pages Pinning
- Improved Sharing
- Better Mobile Experiences
- Image and Video Previews
- Document Library Accessibility



Better File Handling

- Large File Support
 - Previous versions of SharePoint did not support uploading or downloading files larger than 2,047 MB. SharePoint 2016 now allows you to upload or download larger files.
 - Keep it under 10GB
- Special Character Support
 - SharePoint has historically blocked file names that included the &, ~, {, and } characters, file names that contained a GUID, file names with leading dots, and file names longer than 128 characters. These restrictions are removed in SharePoint Server 2016 and are now available to use.
 - Restricted characters such as % and # are still not allowed in file names.
- ODF for document libraries
 - The Open Document Format (ODF) enables you to create new files in a document library and save as ODF files so that users can edit the new file with a program they choose
- Durable Links
 - Resource-based URLs now retain links when documents are renamed or moved in SharePoint

Compliance Features

- Document Deletion Policies
- Identification and Search for sensitive content
- IRM
- Existing Features
 - E-Discovery
 - Document ID
 - Multi-Stage Retention
 - Per-Item Audit Reports
 - Hierarchical File Plans
 - File Plan Report
 - Taxonomy and Centralized Content Types
 - Content Organizer

Compliance Features

- Document Deletion Policies

New deletion rule ✕

Name: * ⓘ

Delete action:

Delete to Recycle Bin

Permanently Delete

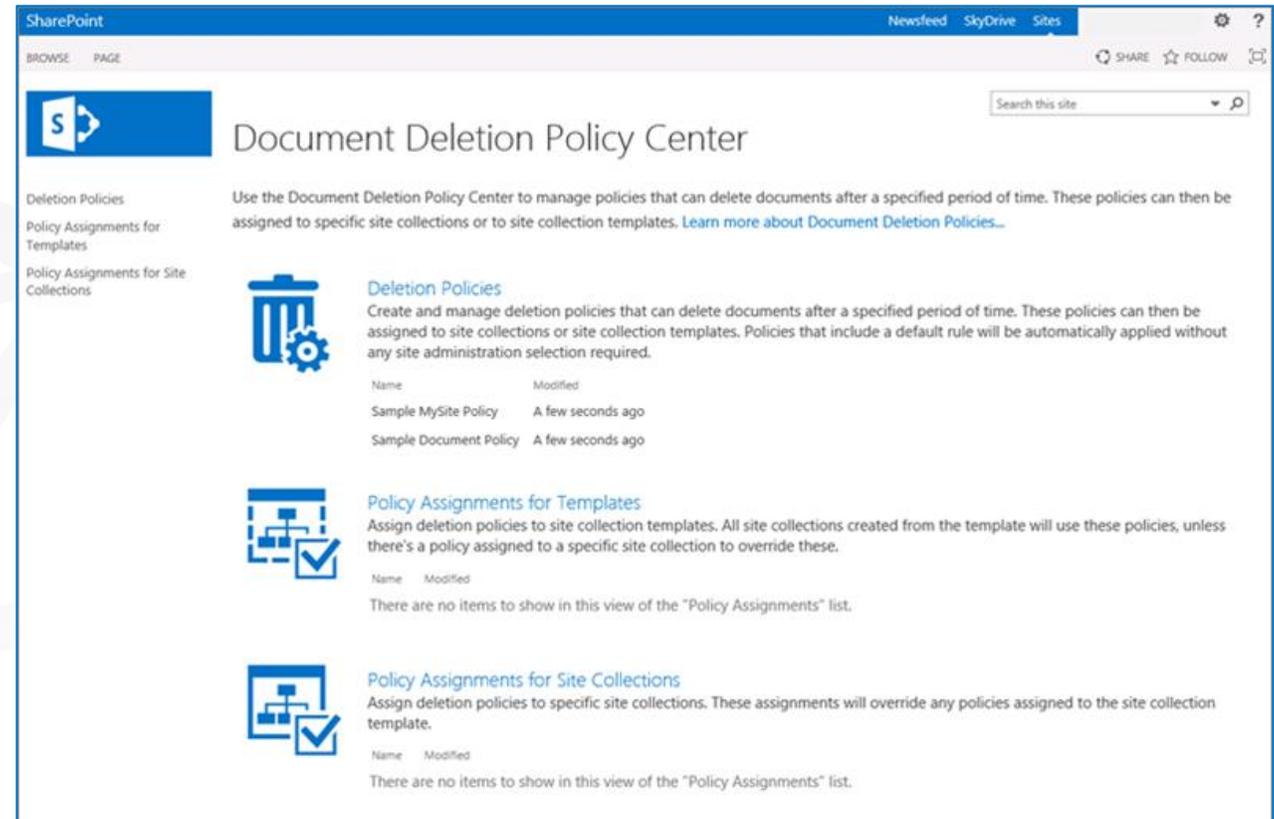
Date from when the document deletion date will be calculated:

Last Modified Date ▾

Time period after which the document will be deleted: *

Years ▾

Set as default rule ⓘ



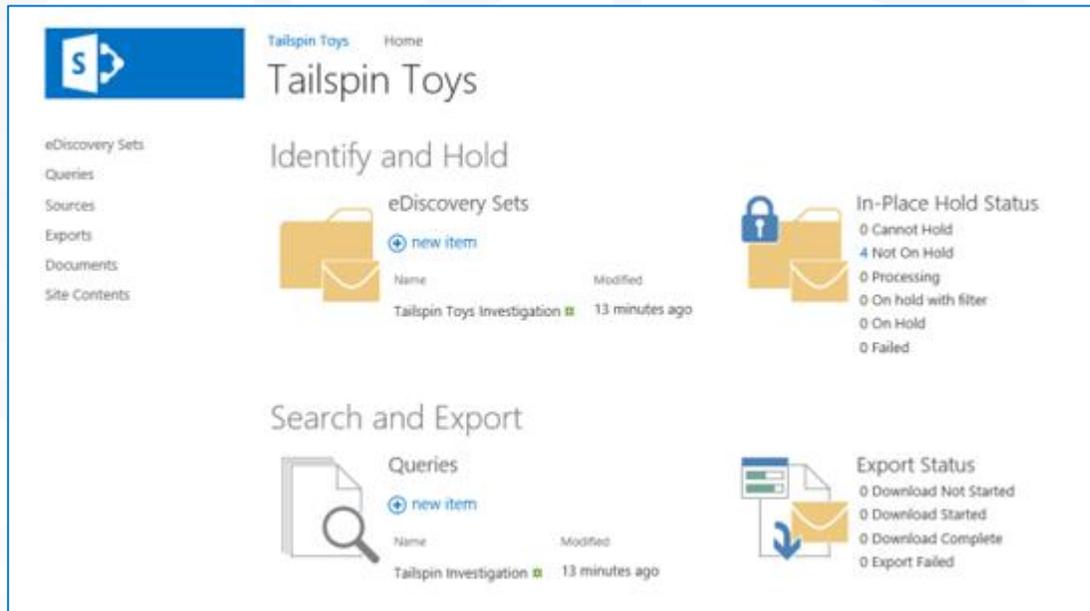
The screenshot shows the SharePoint 'Document Deletion Policy Center' interface. The page title is 'Document Deletion Policy Center'. Below the title, there is a description: 'Use the Document Deletion Policy Center to manage policies that can delete documents after a specified period of time. These policies can then be assigned to specific site collections or to site collection templates. [Learn more about Document Deletion Policies...](#)'

The interface is divided into three main sections:

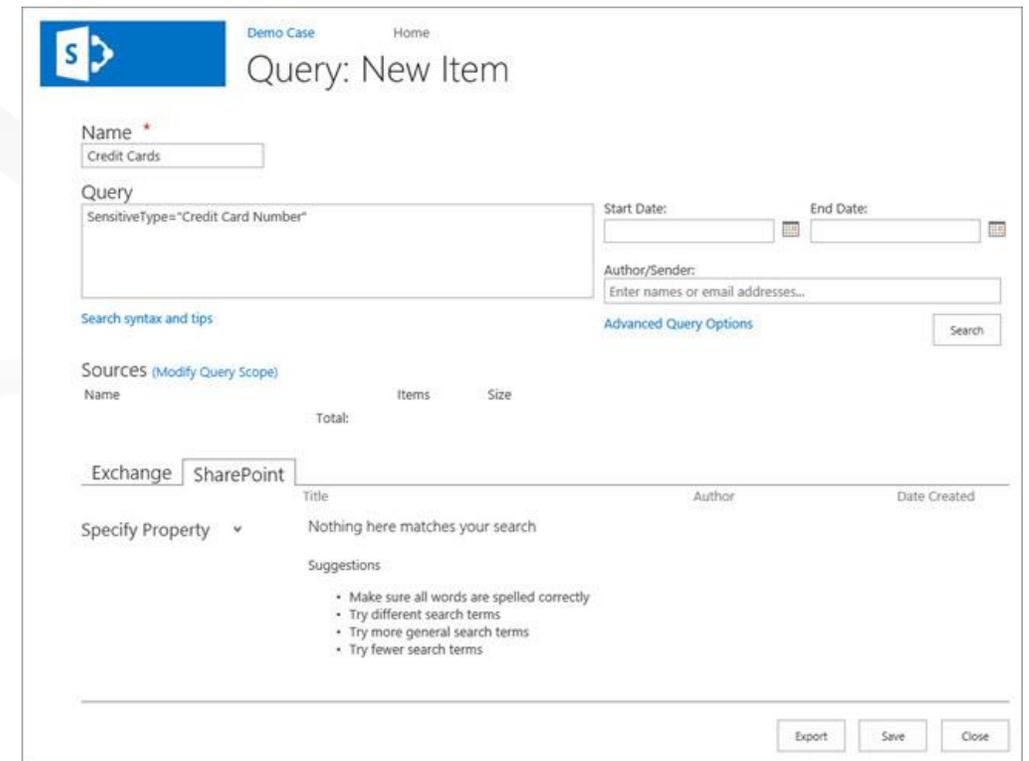
- Deletion Policies:** This section includes a trash can icon and a gear icon. It contains a table with two columns: 'Name' and 'Modified'. The table lists two items: 'Sample MySite Policy' and 'Sample Document Policy', both with a modification time of 'A few seconds ago'.
- Policy Assignments for Templates:** This section includes a document icon and a checkmark icon. It contains a description: 'Assign deletion policies to site collection templates. All site collections created from the template will use these policies, unless there's a policy assigned to a specific site collection to override these.' Below this, it says 'There are no items to show in this view of the "Policy Assignments" list.'
- Policy Assignments for Site Collections:** This section includes a document icon and a checkmark icon. It contains a description: 'Assign deletion policies to specific site collections. These assignments will override any policies assigned to the site collection template.' Below this, it says 'There are no items to show in this view of the "Policy Assignments" list.'

Compliance Features

- Identification and Search for sensitive content



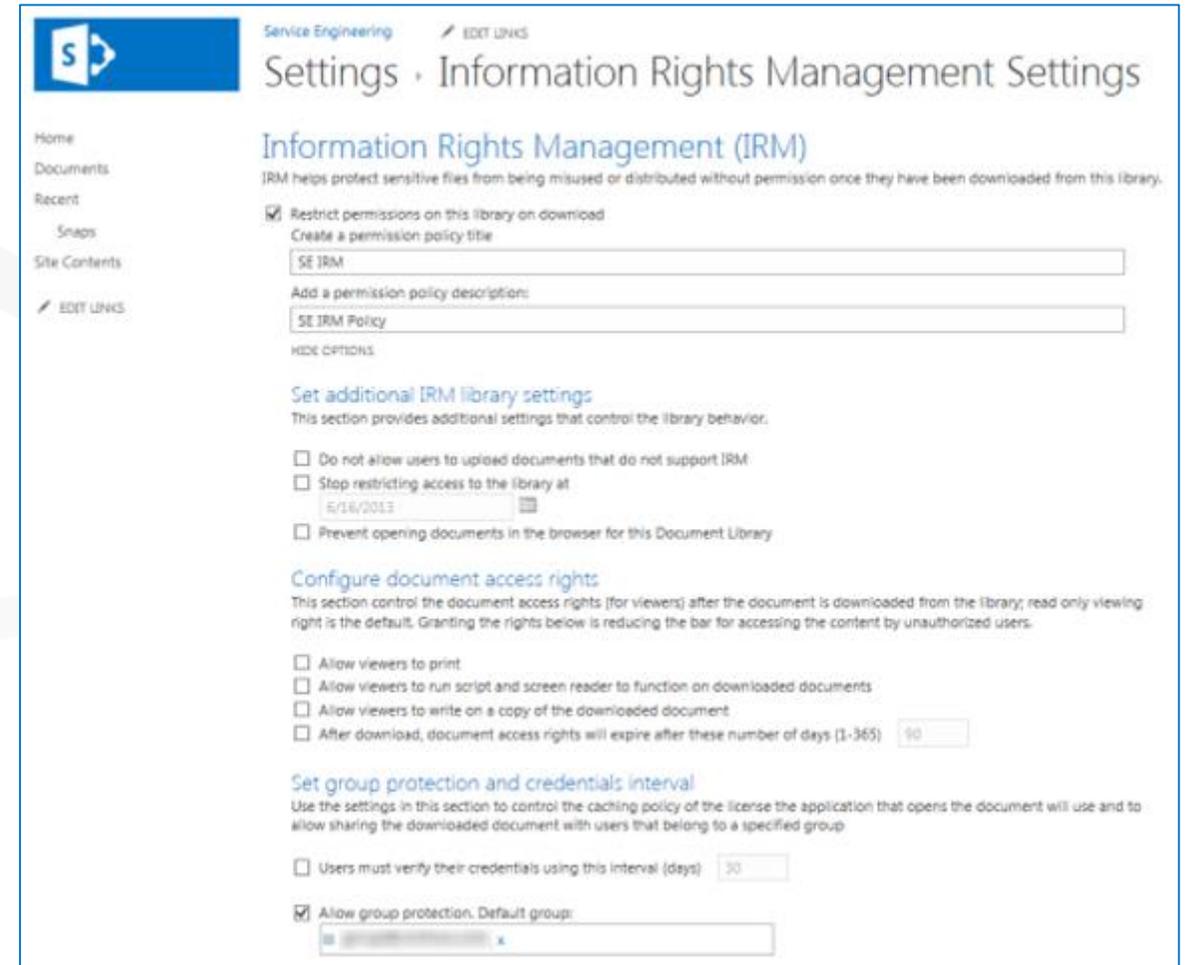
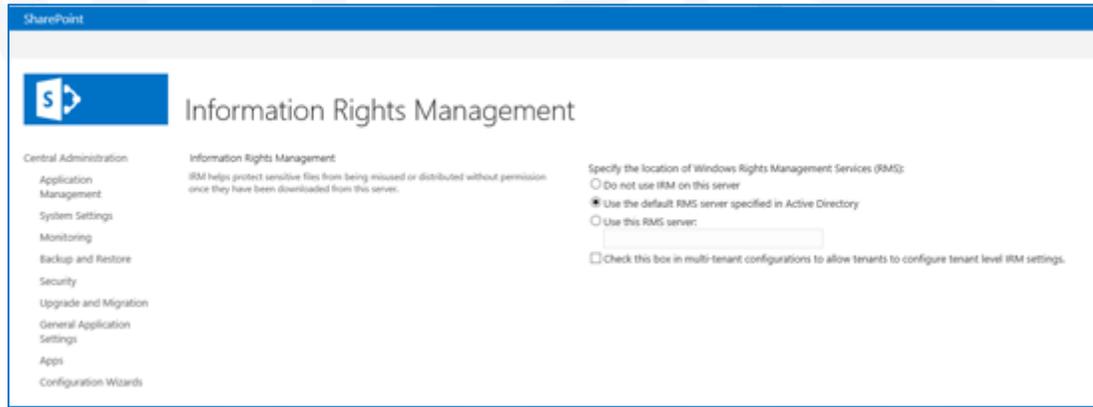
The screenshot shows the 'Tailspin Toys' eDiscovery dashboard. It features a left-hand navigation menu with options like 'eDiscovery Sets', 'Queries', 'Sources', 'Exports', 'Documents', and 'Site Contents'. The main area is divided into four sections: 'Identify and Hold' with an 'eDiscovery Sets' table showing 'Tailspin Toys Investigation' modified 13 minutes ago; 'In-Place Hold Status' with a summary: 0 Cannot Hold, 4 Not On Hold, 0 Processing, 0 On hold with filter, 0 On Hold, and 0 Failed; 'Search and Export' with a 'Queries' table showing 'Tailspin Investigation' modified 13 minutes ago; and 'Export Status' with a summary: 0 Download Not Started, 0 Download Started, 0 Download Complete, and 0 Export Failed.



The screenshot shows the search results interface for a query named 'New Item'. The search criteria include 'Name' (Credit Cards) and 'Query' (SensitiveTypes='Credit Card Number'). The results table shows two sources: 'Exchange' and 'SharePoint', both with 0 items. The 'Specify Property' dropdown is set to 'Nothing here matches your search'. A 'Suggestions' section provides tips like 'Make sure all words are spelled correctly' and 'Try different search terms'. At the bottom, there are 'Export', 'Save', and 'Close' buttons.

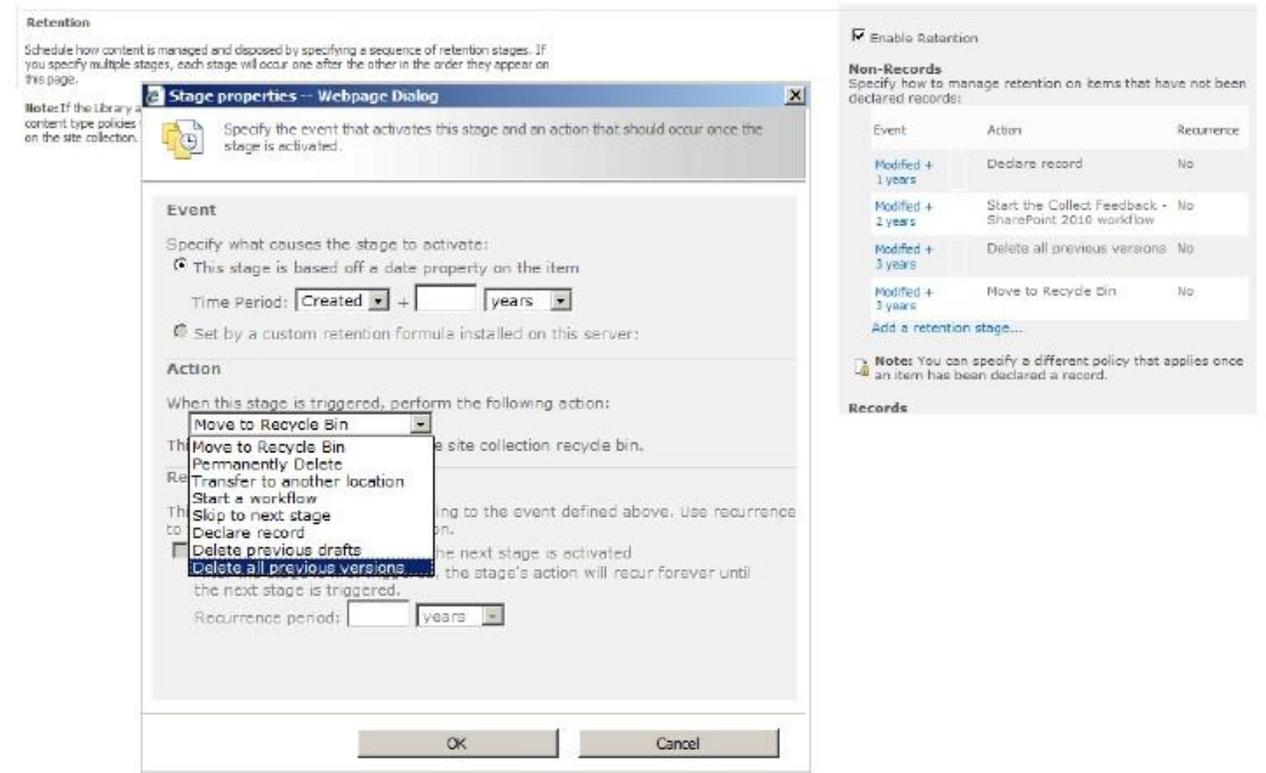
Compliance Features

- IRM Integration



Compliance Features

- Existing Features
 - E-Discovery
 - Document ID
 - Multi-Stage Retention
 - Per-Item Audit Reports
 - Hierarchical File Plans
 - File Plan Report
 - Taxonomy and Centralized Content Types
 - Content Organizer



Retention
Schedule how content is managed and disposed by specifying a sequence of retention stages. If you specify multiple stages, each stage will occur one after the other in the order they appear on this page.
Note: If the library has content type policies on the site collection.

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: + years
 Set by a custom retention formula installed on this server:

Action
When this stage is triggered, perform the following action:

 Move to Recycle Bin: Move the item to the site collection recycle bin.
 Permanently Delete: Permanently delete the item.
 Transfer to another location: Transfer the item to the location specified in the event defined above. Use recurrence to specify how often the stage's action will recur forever until the next stage is triggered.
 Start a workflow: Start the workflow specified in the event defined above. Use recurrence to specify how often the stage's action will recur forever until the next stage is triggered.
 Skip to next stage: Skip to the next stage in the retention policy.
 Declare record: Declare a record for the item.
 Delete previous drafts: Delete all previous drafts of the item.
 Delete all previous versions: Delete all previous versions of the item.
 Recurrence period: years

Enable Retention

Non-Records
Specify how to manage retention on items that have not been declared records:

Event	Action	Recurrence
Modified + 1 years	Declare record	No
Modified + 2 years	Start the Collect Feedback - No SharePoint 2010 workflow	No
Modified + 3 years	Delete all previous versions	No
Modified + 3 years	Move to Recycle Bin	No

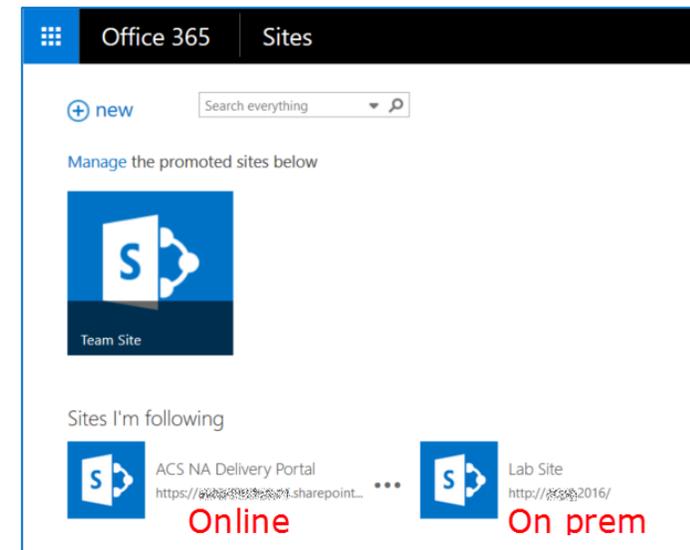
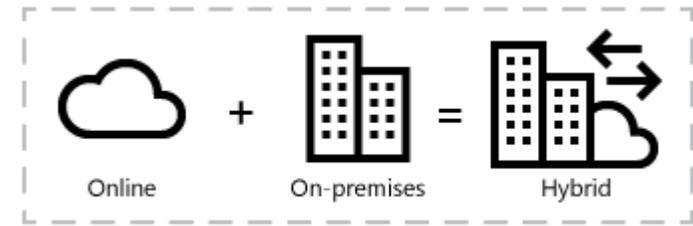
[Add a retention stage...](#)

Note: You can specify a different policy that applies once an item has been declared a record.

Records

Hybrid Capability

- Hybrid Sites
 - Followed sites from both locations are consolidated in the SharePoint Online followed sites list. SharePoint Server links to the followed sites list redirect users to the SharePoint Online followed sites list.
- Hybrid OneDrive for Business
 - OneDrive links are provided in SharePoint Server which direct users to OneDrive for Business in Office 365.
- Hybrid Search
 - Search results between the two locations are combined in one of two ways. Cloud hybrid search crawls on-premises content and indexes it in the search index in Office 365. Users can search the Office 365 index from either location. Hybrid federated search combines search results from each search index in a single search center.



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