envision IT

Leaders in SharePoint Solutions

SharePoint 2010 Enterprise Content Management

April 23, 2010

Overview

Microsoft's Information Pillars

Enterprise Content Management	Collaboration Social Computing	Enterprise Search	Business Intelligence	Unified Communications

Building Solutions - Composites

Workflow	Search	Business Data Catalog	Extensible UI	Open XML File Formats	Website and Security Framework

Secure, Well-Managed Infrastructure

Today's business productivity challenges

**Meet changing
business needs**

**Manage IT costs
and complexity**
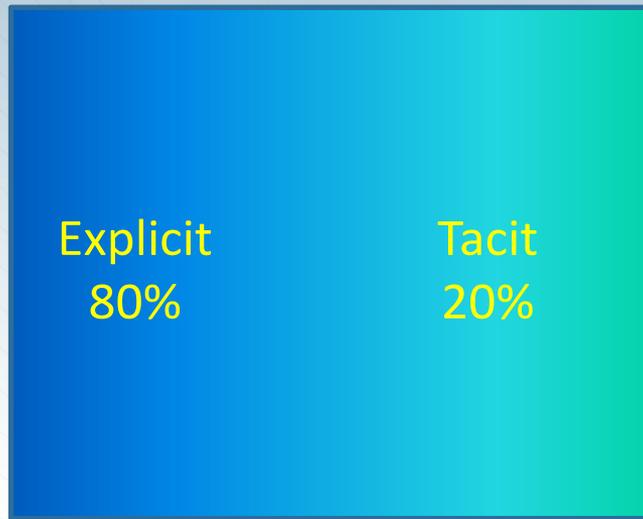
- Drive insight from complexity
- Work with customers and partners
- Embrace Millennial work styles
- Comply with regulations

- Integrate line-of-business systems
- Provide scale agility
- Enable innovation
- Protect intellectual property

Explicit vs. Tacit knowledge

Explicit	Tacit
80%	20%

Early 20th century activity

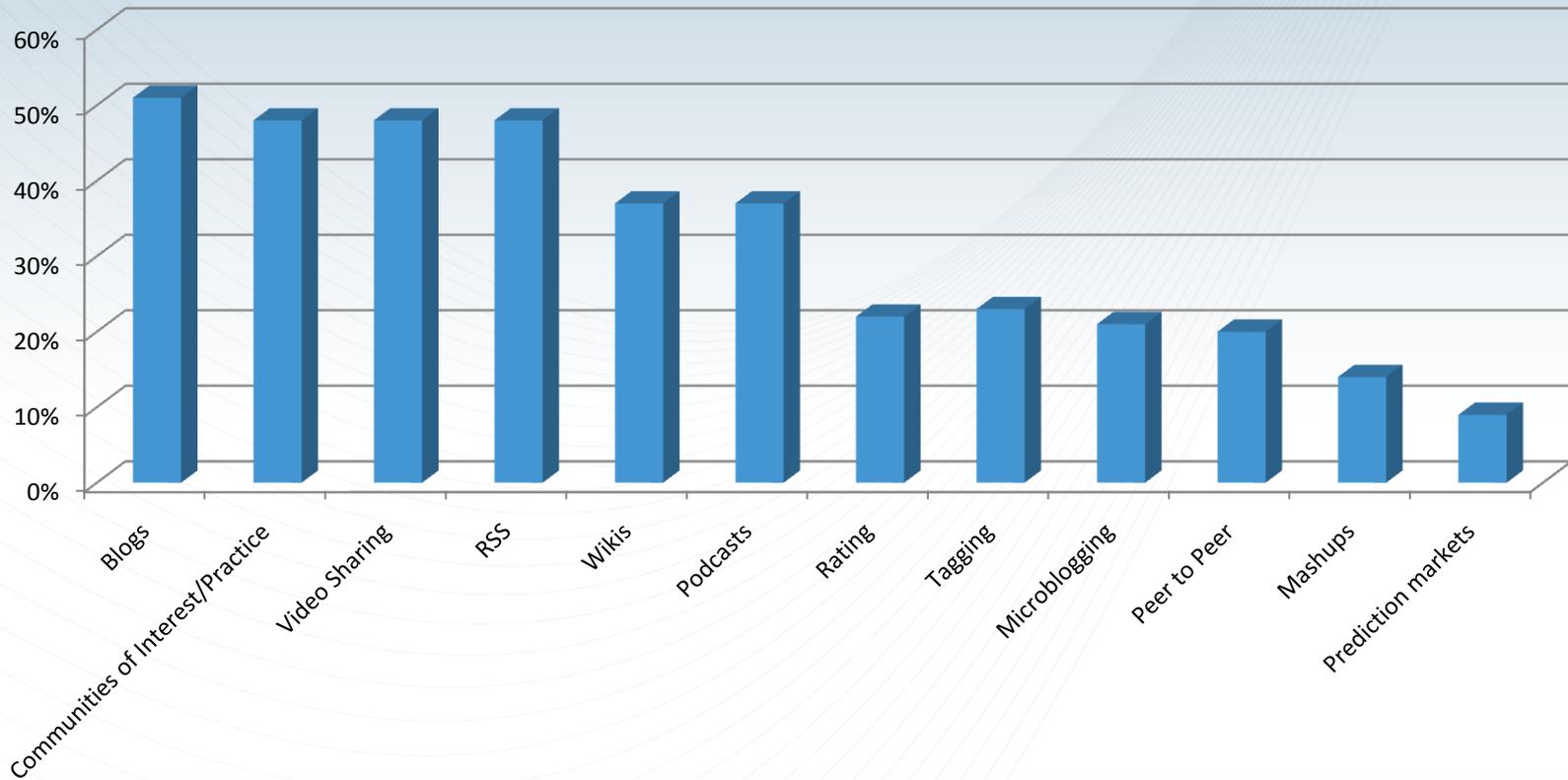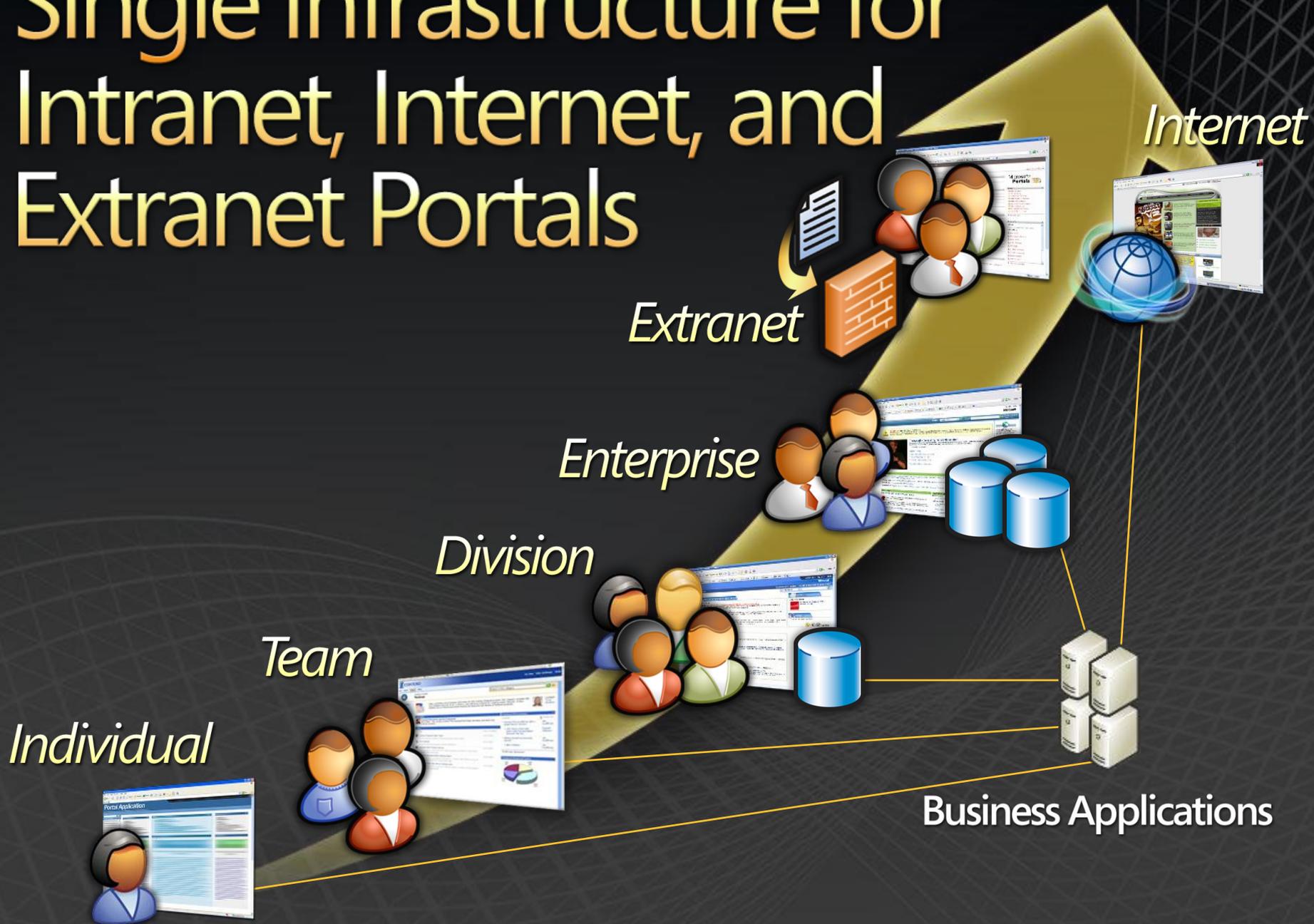| Explicit	Tacit
20%	80%

Early 21st century activity

Web 2.0 Technology Usage

How companies are benefiting from Web 2.0: Kinsey & Company, September 2009
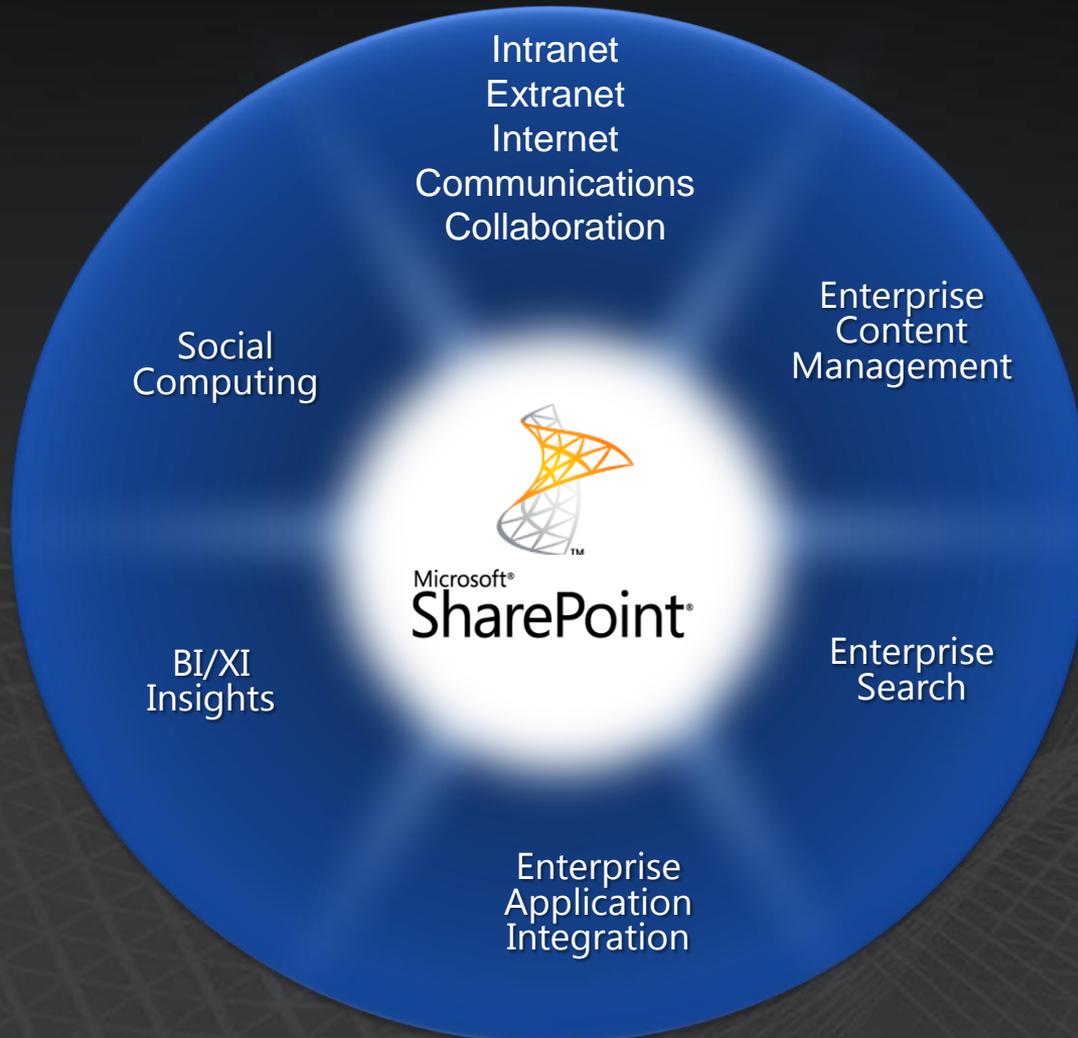

Usage for business purpose

Single Infrastructure for Intranet, Internet, and Extranet Portals

Individual

Team

Division

Enterprise

Extranet

Internet

Business Applications

Microsoft SharePoint 2010
Web Enabled Business Process Automation Platform

Intranet
Extranet
Internet
Communications
Collaboration

Enterprise
Content
Management

Social
Computing

Microsoft® SharePoint®

Enterprise
Search

BI/XI
Insights

Enterprise
Application
Integration

SharePoint 2010

Microsoft® SharePoint® 2010

Intranet

Microsoft® SharePoint® Server 2010

- *Enterprise Client Access License (CAL)*
- *Standard Client Access License (CAL)*

Internet / Extranet

Microsoft® SharePoint® Server 2010
for Internet Sites Enterprise

Microsoft® SharePoint® Server 2010
for Internet Sites Standard

Enabling Technologies

Microsoft® SharePoint® Designer 2010

Microsoft® SharePoint® Foundation 2010

The Standard CAL
Documents and people

Provides a collaboration platform across all types of content. Use the core capabilities of SharePoint manage content and business processes, find and share information and expertise, and simplify how people work together across organizational boundaries.

Portal (Personalized Content and MySites)	**Document/Records Mgmt.**	**Social Computing** (Enterprise Wikis, Ratings, Folksonomy)
ECM, WCM, Rich Media Mgmt.	**Enterprise Search**	**Legal Holds, In-place Records Mgmt.**

The Enterprise CAL
Documents, people... and data

Enables advanced collaboration scenarios for end users to locate, create, and act on data and documents in disparate sources from within a familiar and unified infrastructure

Excel Services	PerformancePoint Services	Advanced Charting
Visio Services	Access Services	InfoPath Forms Services
Client LOB Integration/ LOB Web Parts	Custom Reports	FAST Search Use Rights*
Portal	Doc/Records Mgmt.	Social Computing
ECM, WCM, RMM	Enterprise Search	Legal Holds, In-Place Rec. Mgmt.

* Requires FAST Search Server 2010 for SharePoint

Microsoft SharePoint 2010/Enterprise CAL

Collaborative information gathering ecosystem

Ribbon UI
SharePoint Workspace
SharePoint Mobile
Office Client and WAC Integration
Standards Support

Business Connectivity Services
InfoPath Form Services
External Lists
Workflow
SharePoint Designer
Visual Studio
Access Services
API Enhancements
REST/ATOM/RSS

Tagging, Tag Cloud, Ratings
Social Bookmarking
Blogs and Wikis
My Sites
Activity Feeds
Profiles and Expertise
Org Browsing
Mobile Support

Sites

Composites

Communities

Microsoft® SharePoint®

Insights

Content

PerformancePoint Services
Excel Services
Charts
Visio Services
Web Analytics
SQL Server Integration/Gemini

Enterprise Content Types
Enterprise Metadata and Nav
Document Sets
Multi-stage Disposition
Audio and Video Content Types
Remote Blob Storage
List Enhancements

Search

Phonetic Search
Navigators
FAST Integration
Document Preview
Enhanced Pipeline

Ribbon UI = Foundation
MySites = Standard CAL
Excel Services = Enterprise CAL

Office 2010: The Best Productivity Experience Across the PC, Phone & Browser

Collaboration without Compromise

- Work better together with co-authoring & OneNote
- Gain control over e-mail with conversation management
- Share instantly with Broadcast Slide Show

Bring Ideas to Life

- Find more with Backstage view and ribbon UI
- Tell a story with photo & video editing
- Make sense of data with Gemini & Sparklines

Anywhere Access

- Work from virtually any place, device with Web Apps
- Keep up on the go with SharePoint Workspace
- Do more on your Windows or Nokia phone

The Practical IT Platform

- Get better performance on new & existing hardware
- Improve security with new layered defenses
- Simplify connectivity to SharePoint & other services
- Maintain compliance - accessibility to e-mail to ECM

Office 2010: The Best Productivity Experience Across the PC, Phone & Browser

Work Better Together	Bring Ideas to Life	Use Office Anywhere	The Practical Productivity Platform
Co-authoring	OneNote®	Office Web Apps	Layered defenses
Broadcast Slide Show	Photo and video editing	SharePoint Workspace (formerly Groove®)	Compliance and accessibility
E-mail conversation management	Excel® PowerPivot and Sparklines	Windows® or Nokia phone	
Outlook Social Connector	Backstage view and the Ribbon UI		

Introducing Office Professional Plus 2010

~~Office Enterprise~~

Microsoft® Office Professional Plus 2010

Word

Excel®

PowerPoint®

Outlook®

Publisher

Access®

InfoPath®

OneNote®

Communicator

Web Apps

SharePoint® Workspace (Groove®)

NOW INCLUDED

OneNote 2010

Stay organized and on top of your work.

Store and share thoughts and information. The improved search experience displays search results as the user types—and it includes a new ranking system that "learns" from past choices, prioritizing notes, pages, page titles, and recent picks.

Office Web Apps

Respond faster and better, even when you are away from the office.

Online companions to Microsoft Word®, Excel®, PowerPoint®, and OneNote® let you review and make light edits to documents from a supported browser. Feel confident with your data since document formatting and content is maintained when edits are done in the browser. Office Web Apps can be hosted on premises, running on Microsoft SharePoint®.

SharePoint Workspace 2010 (was Office Groove)

Keep productive on the go with a seamless offline/online experience.

Keep your important SharePoint documents and lists available offline. Your changes are automatically synced, so you get them fast even over a low-bandwidth connection.

Benefits of Office Professional Plus

Integrated Collaboration

- Streamlined Communications
- Business & Social Networking
- Integrated ECM
- Publishing Data Insights
- Integrated Electronic Forms

Anywhere Access

- Offline Access
- Across Boundaries

The Practical IT Platform

- IRM & Policy Capabilities
- Managed E-mail Folders & Retention Policy
- Office Extensibility

real estate risk   > Save Search   > Related Searches

Woodgrove Bank — Wealth advisor portal

John Evans
Advisor

real estate risk

> Save Search > Related Searches

Start with a simple query, quickly find and explore

Top information from Woodgrove…new market view report to send to clients

Contact History

10/08   10/09

Net Worth

1M   2M to 6,5M   10+M

% Risk

0   28% to 85%   100

Client Type

Premier 75
Wealth 60
Select 23

State

NY 20   NJ 12   CT 5

Draft e-Mail
Group Review
Expert Review
Schedule Meeting
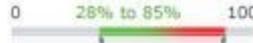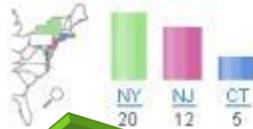
All (6452)   Customers (2100)   Experts (12...)   ... (10)

✓ Active (2051)
✓ Prospects (49)

Deduplication (On)   Previous 1 2 ... Next >

Results: 4452
Order by: Recommend –

Research

Woodgrove Bank Advisory ★ Type: Report ... rnal
All account managers are advised to revie... ustomer accounts to reduce holdings in residential and commer-
cial **real estate** not meeting specified crit... a. Risk to customers is considered ... (1 hour ago)

Woodgrove Market View Type Report - External
This month's report analyzing risk in futures, bonds and **real estate**. ... (1 hour ago)

Set of Customers to explore

Customers

Burk, Susan   Type: Customer-Active; Madison, WI; Net worth: $8.1M; Interactions: 32
Recommending reviewing **REIT risk** within the portfolio in light of recent ...

Finds customers beyond direct terms (REIT ~ real estate)

Lee, Oliver
Type: Customer-Active; Leesburg, FL; Net worth: $4...
Opportunities: Savings Account Investment; Advisor: ...

Order by: Recommend –

Oliver_Lee_83249_Annual_Plan.doc Type: Annual Plan; Is being edited by Esther Valle ▲ > Join
... especially your comment on **real estate**, which I had been ...

Oliver_Lee_83249_Allocation _Proposal.ppt Type: Allocation Proposal
All account managers are advised to review customer accounts to reduce holdings in residential
and commercial **real estate** not meeting specified criteria. Risk to customers is considered ...

View of information across different pivots, with drilldown

Immediate actions on selected items

Top Holdings
1. **Woodgrove REIT Fund**
2. Nike
3. BP
4. **Contoso Development**
5. Volupatem, Inc.
6. A-One

more

Current Allocation
● Real Estate 40%
● Banking 19%
● Ti-Tech 11%
● Food 10%
● Fuel 10%
● Television 10%

more...

Contact History
Email
12/14/2009 Followup to allocation discussion: especially your comment on **real estate risk**, which I had...
Phone
01/12/2010 13:41m 1 212-999-1212; Call to Lee ▶

more...

Drilldown to single view with all clues about a customer: portfolio, holdings, communications, annual and quarterly customer plans, etc…

People

Ryan Gregg Expert ☑ ▲
Real Estate Risk ★★★★★

Liberty Munson Expert ☐ ▲
Real Estate Markets ★★★★★

Shelley Dyck Expert ☐ ▲
Real Estate Futures ★★★★★

Esther Valle Advisor ☐ ▲
Real Estate Finance ★★★★★

Michael Tucker Advisor ☐ ▲
Banking Real Estate ★★★★★

Experts to help, with availability and rating

Arti...

U.S. Bank Examiners Say Commercial Loans Biggest Risk
Losses on commercial **REIT real estate** loans pose the biggest risk to U.S. banks this year, troubling smaller lenders while unlikely to threaten the entire financial system, U.S. bank examiners concluded during a review.
more...

From Forums

Midwest Realtors | AnnaTrey1
... noticed that **REIT real estate risk** is not leveling the way the economists have pr...
S...
m...

News and external opinion to monitor and send to clients

SharePoint Composites
Pervasive external data with Business Connectivity Services

SharePoint Workspace with InfoPath Forms

SharePoint lists

Outlook Forms and Task panes

Search results

Office Apps

Order
  OrderID
  CustomerID
  EmployeeID
  OrderDate

SQL   WS   LOB

Introductions

- Erik Moll, Information Worker Solution Specialist, Microsoft

- Joe Seguin, Senior Consultant, Envision IT

- Peter Mackenzie, VP, Envision IT

- Peter Carson, President, Envision IT

Envision IT

Focused on complex SharePoint solutions, Envision IT is the "go-to" partner for Microsoft SharePoint, building integrated public web sites, Intranets, Extranets, and web applications that leverage your existing systems anywhere over the Internet.

Our Focus

- Building solutions for intranets, collaboration portals, extranets and internets with SharePoint

- Extending SharePoint past out-of-the-box features

- Supporting our focus:
  - Custom .NET Development and Business Process Automation
  - Business Intelligence
  - Business Productivity Training

Microsoft SharePoint 2010

The Business Collaboration Platform for the Enterprise and the Web
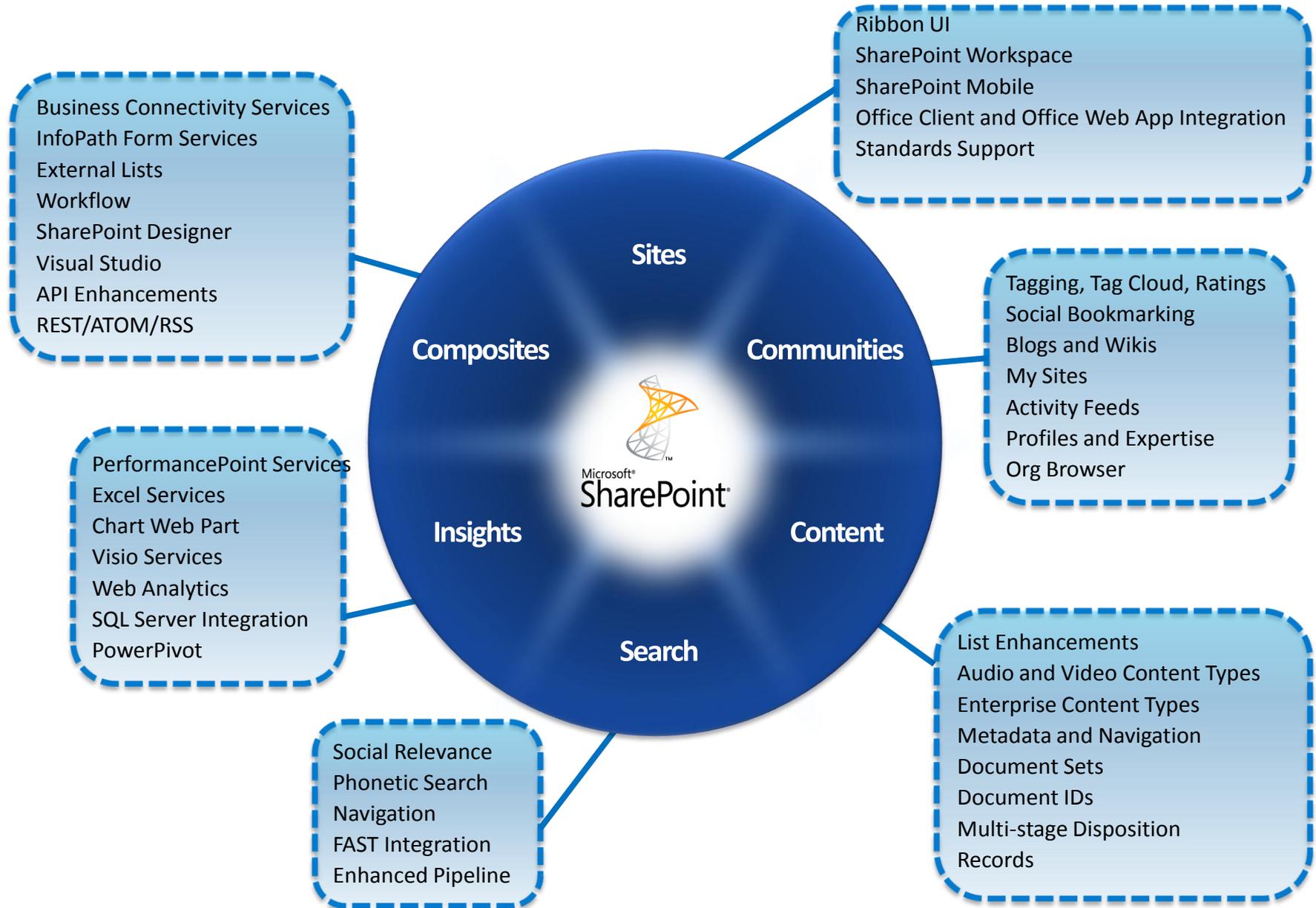

- Sites
- Communities
- Composites
- Insights
- Content
- Search

Microsoft® SharePoint®
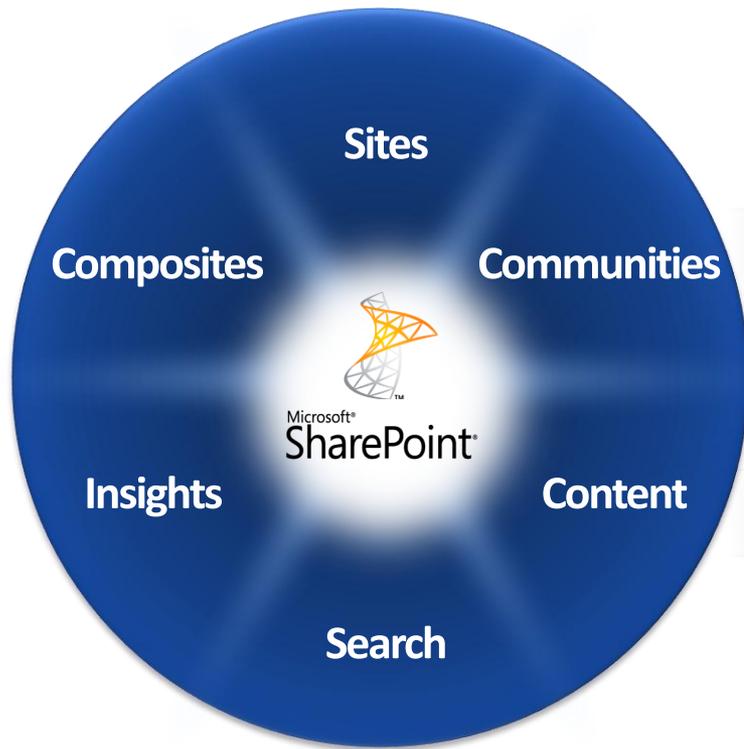
Connect and Empower People

Cut Costs with a Unified Infrastructure

Rapidly Respond to Business Needs

envision IT
Leaders in SharePoint Solutions

Microsoft SharePoint 2010

Business Connectivity Services
InfoPath Form Services
External Lists
Workflow
SharePoint Designer
Visual Studio
API Enhancements
REST/ATOM/RSS

Ribbon UI
SharePoint Workspace
SharePoint Mobile
Office Client and Office Web App Integration
Standards Support

Tagging, Tag Cloud, Ratings
Social Bookmarking
Blogs and Wikis
My Sites
Activity Feeds
Profiles and Expertise
Org Browser

PerformancePoint Services
Excel Services
Chart Web Part
Visio Services
Web Analytics
SQL Server Integration
PowerPivot

List Enhancements
Audio and Video Content Types
Enterprise Content Types
Metadata and Navigation
Document Sets
Document IDs
Multi-stage Disposition
Records

Social Relevance
Phonetic Search
Navigation
FAST Integration
Enhanced Pipeline

Sites
Composites
Communities
Insights
Content
Search

Microsoft® SharePoint®

What is Enterprise Content Management?

- ECM helps businesses manage all data including
  - Structured data captured in LOB systems
  - Unstructured data including documents, spreadsheets and other files

ECM is the strategies, methods and tools used to capture, manage, store, preserve, and deliver content and documents related to organizational processes.

Association for Information and Image Management (AIIM)

ECM Solution Features

- Document Management
- Records Management
- Web Content Management
- Rich Media Management
- Archiving and Library Service

- Workflow
- Business Process Management
- Scanning
- Document Output Management
- Email Archiving

Demonstration:
SharePoint Sites and Libraries

The Value of Metadata

- Metadata comes in many forms
  - Taxonomy and Folksonomy
  - Social relationships
- Metadata drives discovery and action
  - Navigation
  - Search
  - Interaction

Document Management: Feature Review

- Tag
  - cross farm with shared **hierarchal taxonomies** and types
  - automatically with **location based metadata** defaults
- Discover
  - with **metadata based navigation** in client and server
  - with **location based view definitions**
  - the best content with **Ratings**
  - the latest version with **Unique Document IDs**
  - repositories with ties to **Office Client New/Open/Save**
- Manage
  - with Metadata based **content organizer**
  - with **Multi-stage retention policies**
  - with **Location/Folder based policies**
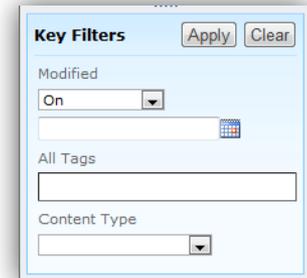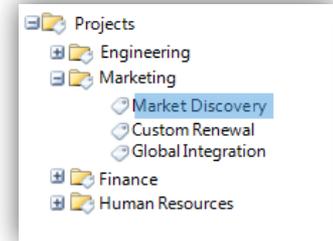
Demonstration:
Metadata

Document Sets:

- New object to manage work products made up of multiple documents

- Key Scenarios
    - Tight collection of documents
        - A sales proposal that includes documents (proposal), spreadsheets (quotation), and presentations
        - Heterogeneous file types not usually assembled
    - Compound documents
        - A user manual that is an assembled roll-up of separate sections

- Document Set Features
    - Shared Metadata
    - Customized welcome page
    - Default documents added
    - Version capture
    - Workflows
    - Portability (download/upload/send to record center)

Document Sets

- Automate repetitive content creation
- Guide users through complex processes
- Provide process insights
- Manage related work products
- Foundation for document assembly

Demonstration:
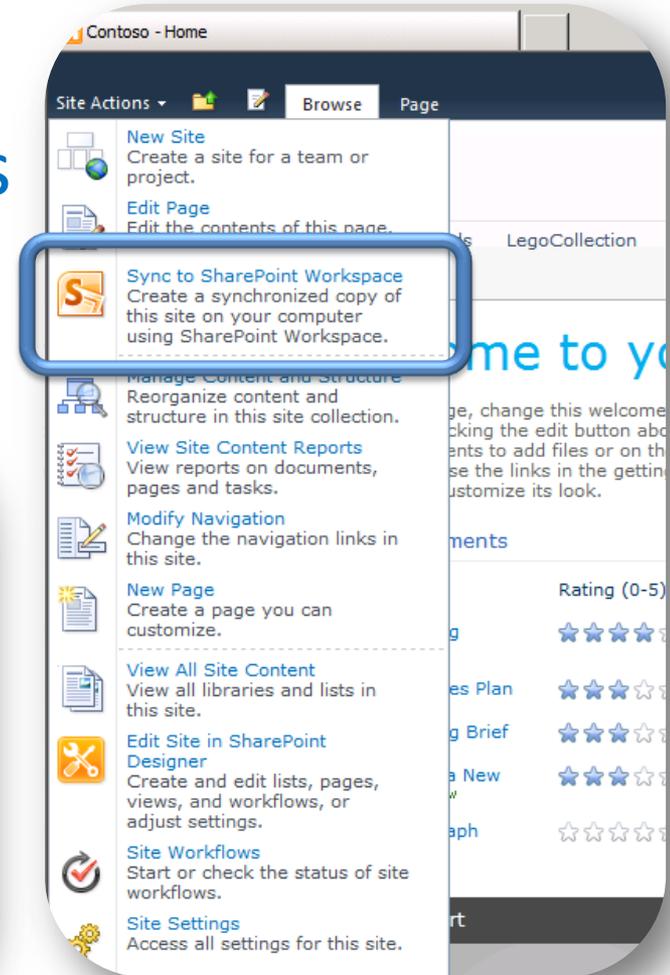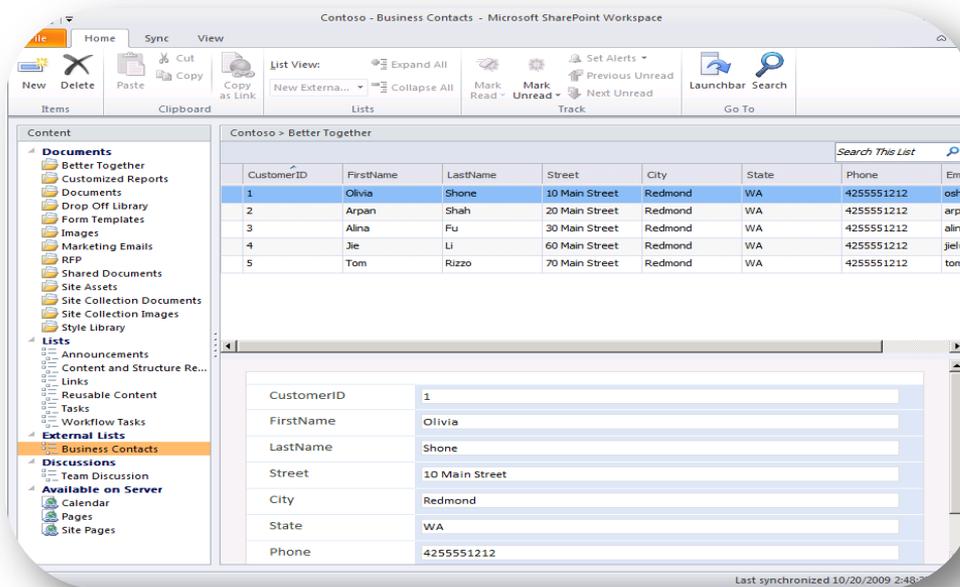# Document Sets

Records Management

- What is the right way to enforce compliance
  - In an archive
  - In place
  - A mix
- Breadth is key
  - All content is equal and discoverable

Demonstration:
Records Management

SharePoint Workspace 2010

- Sync to SharePoint Workspace

- Update SharePoint documents and lists when you're not connected

Manage the Unmanaged

- Most organizations have File Servers and SharePoint to meet core requirements
- Bring platforms together
  - Take control of your file servers
  - Define what goes where
  - Migrate content as required
  - Define an ongoing strategy

Questions?

Contact Info

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