KnowledgeLake

The Essential Guide for Implementing Document Management

with Microsoft Office 365, Teams and SharePoint Online

Getting the Most Out of Your Microsoft Investment

Microsoft Partner
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Introduction

The global COVID-19 pandemic that began in early 2020 has changed a lot of things. From a business perspective, one of the biggest changes is that remote work is now the norm, and in parallel with that, an explosion in the adoption of remote working technologies. Despite some new additions to our nomenclature, (who hasn't said, "I zoomed today with so-and-so"), the biggest winner in this space has been Microsoft Teams.

Surprised?

In November 2019, Microsoft proudly announced that Teams had hit 20 million daily users. That was an achievement, but fast forward to 2021, and 20 million seems like a drop in the remote working ocean. As of April 2021, just 18 months after the initial announcement, Microsoft Teams hit 145 million daily users.

Yes, this growth is incredible. And yes, MS Teams is a leading light in collaboration tools. But Teams is just part of the overall stack of information empowerment tools provided by Microsoft.

MS Teams may be the figurehead, but don't forget Office 365, which since its release in 2017 has become one of the most popular business-critical, cloud-based collaboration platforms for enterprises across the globe.

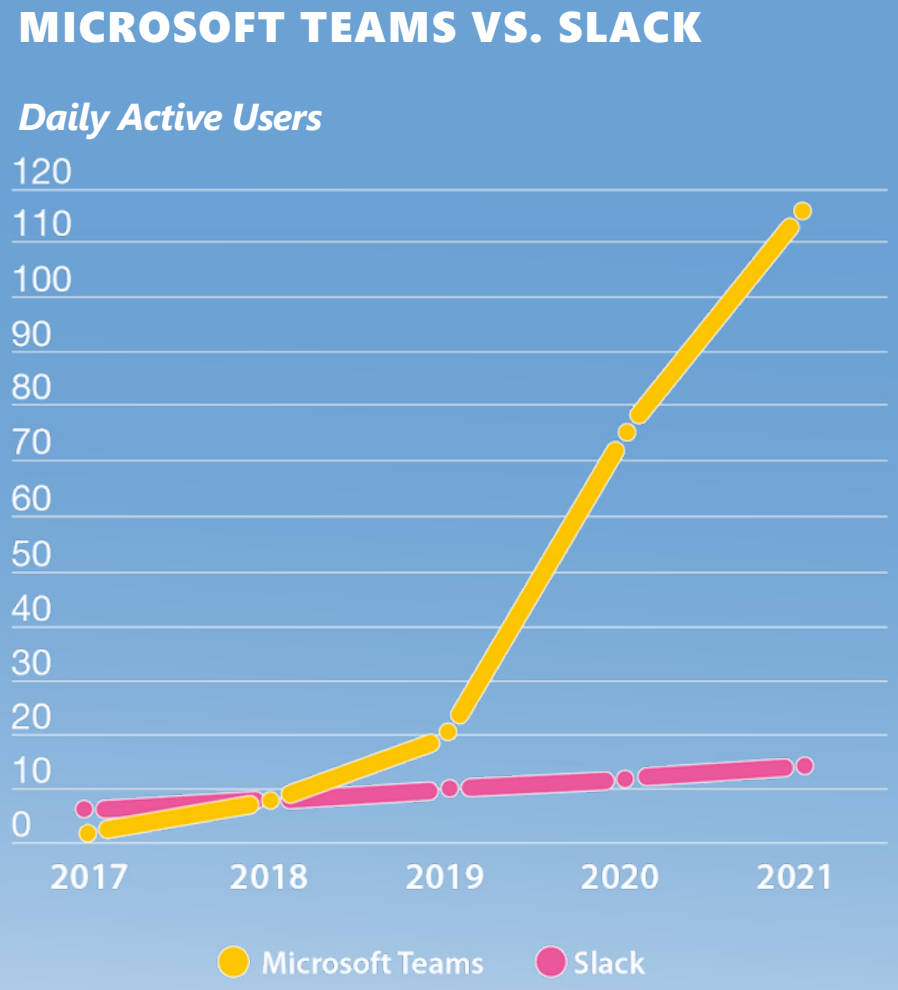


Image Courtesy of BusinessofApps.com

Underpinning both of these toolsets is the granddaddy of them all — SharePoint. Loved and hated in equal measure, SharePoint has been an integral part of many organizations' desire to manage, store, and share content with colleagues, partners, and customers for the past 20 years.

So, what does this all mean for the enterprise? The liberation that many have felt with the arrival of remote working has been tempered by concerns over how best to give remote workers access to systems and information, and how to manage security and compliance across new virtual boundaries.

This eBook looks at how modern businesses can balance the risk of this newly democratized landscape with the equal, if not greater, rewards that it offers in terms of staff empowerment and the ability for teams to just "get stuff done."

We are entering a new era of the information-driven enterprise. Join us as we explore the best practices that can help your organization get the most out of the new world of content management.

https://tomtalks.blog/2020/12/microsoft-teams-statistics/

Modern Organizations Live In The Cloud

All of the tools that we mentioned in our introduction live and breathe in the cloud. MS Teams, Office 365, and SharePoint Online all deliver significant cloud-enabled benefits for organizations, such as:

- Microsoft issuing regular updates and new features, freeing up organizations from having to manage on-premises servers and applications; IT staff can address other, higher-value projects and tasks
- A subscription model that allows licenses to be easily transferred as new users are added, shifted, or removed
- Users not being tied down to a single device or network—content can be accessed any time, any place

Does this mean that you cannot get value from the Microsoft tools if you do not fully commit to the cloud? Absolutely not. But to get the full value of what is on offer, you'd be crazy not to be looking to the cloud.

Integration Is Now Standard

The first thing to say about these Microsoft tools that now live in the cloud is that they are all deeply integrated.

SharePoint Online is firmly embedded in Office 365 and widely recognized as the backend of the Office productivity suite, Teams, and Power Automate. The impact of this change for organizations that run their business on the Microsoft ecosystem cannot be overstated.

Where Microsoft Office 365 is the go-to business-critical collaboration platform for enterprises across the globe, Teams acts as the communication tool of choice. Both form equally important pieces of the puzzle — Office allowing individuals and groups to create documents, presentations, and to manage their emails, whereas Teams allow them to function (pun intended) as a team, no matter where they work.

And underpinning both, SharePoint Online allows organizations to manage, store, and share content with colleagues, partners, and customers. For organizations that truly care about effective content management, SharePoint is often the organizing hub for content, but the integrated nature of the Microsoft stack means that users can access corporate-wide content from the tool of their choice.

Steering into the Skid

While many CIOs see the rapid adoption of cloud versions of Teams, Office, and SharePoint as hugely liberating, with access to a wide range of new and exciting capabilities, some within the business have different views.

The COVID-19 pandemic required rapid action by IT teams to spin up remote working tools and environments. In the majority of cases, this was done to perfection, allowing many organizations to function as well (if not better) while working remotely as they did in office-based environments. But this came at a cost.

For many, the cost was the relaxation of some of the traditional governance and compliance controls that would typically be applied during the selection and rollout of a new system. This is not a criticism — purely a reflection that in a time of emergency you need to act fast. But once that emergency has passed, it is natural to go back and review the actions taken and fix any issues that resulted.

This is exactly where many organizations are with information management. Whether trying to retrospectively check compliance after an “agile” software deployment, or simply looking to strengthen existing information governance within a business unit, the journey to achieving best practice begins with a plan.

Understanding the Microsoft Content Toolkit

Microsoft offers a number of content management enabling tools and technologies. As previously discussed, of particular interest to us are MS Teams, Office 365, and SharePoint Online. But what does each of these toolsets do, and how do they relate to each other?

Office 365

Office 365 is the collective term used to describe all cloud, subscription-based offerings including Microsoft Office's productivity applications (Word, Excel, and PowerPoint), business email services, internal communication platforms, infrastructure for audio, video, and web conferencing, as well as the capability to share and store internal files in the cloud.

MS Teams

Microsoft Teams launched in November 2016 as part of Office 365. Teams is a collaboration platform enabling groups to communicate via chat, voice, video and file sharing in a single place. A direct competitor to Zoom and Google Hangouts, MS Teams has been a critical component in the move to remote working for Microsoft-focused organizations.

SharePoint Online

SharePoint Online is a collaborative platform that allows an enterprise to store, retrieve, search, archive, track, manage, and report on digitized documents.

SharePoint Online is a component of Office 365 but is also available as a standalone product. SharePoint has a long history pre-cloud and various on-premises versions still operate, offering some capabilities not yet found in the online version. SharePoint tightly integrates with Microsoft Office and MS Teams.

SharePoint Online and Office 365 do possess some of the same features -- such as the ability to store documents. The best fit depends upon your needs and the content.

Selecting the Right Tool

All of the Microsoft content management tools integrate closely with each other, and all are built on top of the massively scalable Azure cloud platform. Identifying which tool should be used in which situation can be confusing — but here are some simple guidelines:

Building Best Practice: 4 Key Areas

It takes careful planning and engagement from users, department heads, and company leaders to ensure that SharePoint, Office, and Teams combine to deliver a robust and scalable content management experience.

Organizations need to create a strong decision framework in choosing their primary means for content management. Doing so requires exploring some fundamental questions:

1. ***Information Architecture*** Are departments prepared to use SharePoint Online in a disciplined way that prevents content from being unorganized or unfindable?
2. ***Information Governance*** Has the organization addressed regulatory requirements and identified potential risks?
3. ***Records Management*** Is there a formal program in place to manage the document lifecycle, including access rights and audit procedures?
4. ***Migrating Content*** What's your migration plan? Are you planning to move all your organization's content, or do you only need to move some of it?

These are four key areas organizations must address to ensure the most effective implementation of SharePoint, Office, and Teams. All of these areas — detailed in the following pages — require IT managers and business managers to collaborate and develop a plan of action.

Information Architecture Design

As businesses create and accumulate more content every day, a content management system quickly becomes imperative. For fast retrieval and sharing of information, users need information to be presented predictively, via a quick search, or by browsing a straightforward and familiar structure. A key to achieving this is a well-planned taxonomy and information architecture that lays the groundwork for the user's successful content management experience.

A taxonomy is simply a controlled and structured set of words that are specific to your business. Think about the terms you use in your business every day; the categories, your folder structure, your business departments. These will all make up parts of your taxonomy. Organizations must create a taxonomy that is relevant to their industry, departments, people, content, and processes.

The taxonomy also drives decision-making on the type of data that needs to be collected about the content and appended to it, in the form of metadata. Metadata is vital to any modern information management initiative as it provides the color and context for any piece of content — it is the "data about data" after all. Metadata can be anything; from system-generated metadata such as when a file was created to user-generated metadata like a custom tag, to AI-generated metadata such as whether a file

Once the taxonomy is established, it informs how content and data should be categorized and structured. In SharePoint Online, this will guide the configuration of architectural components such as:

- ***Sites***
- ***Subsites***
- ***Libraries***
- ***Lists***
- ***Managed Metadata***
- ***Columns "field"***

Organizations can follow established best practices for building an information architecture, but no two companies' architectures will be the same, making this exercise unique and challenging. For example, some might prefer a horizontal and centralized approach, where every team works in a single SharePoint site, using document libraries and other mechanisms to collaborate with and manage the content. Others may choose a tiered approach.

Perhaps a legal department wants a first tier containing drafts, working papers, and individual documents, completely separate from the other business units. The second may be a collaborative tier, comprising the team's active cases to which some departments may need access. Perhaps the third tier is where archiving and long-term records management (retention and destruction) takes place.

As companies get down to identifying and planning the individual business cases, processes, or document types, a defined taxonomy and information architecture is the only way to ensure content is properly organized, accessible, and findable.

Organizations that do not perform this due diligence will suffer downstream — lacking the ability to facilitate workflows, records management, and other advanced content management functions.

Information Governance

Mishandling critical information can cause genuine compliance and regulatory issues, exposing organizations to potential litigation, negative PR, business disruption, and major fines. An over-arching information governance strategy can effectively manage the content placed in SharePoint, Office, Teams, and other environments.

Information governance is the security, control, and optimization of information that ensures people and systems have appropriate access to quality information for the right reasons. There are numerous advantages to having a sound information governance practice, including:

- ***Using company information to make better and quicker business decisions***
- ***Preventing loss of proprietary information***
- ***Safeguarding sensitive information, such as employee records or social security numbers***
- ***Protecting customer information***
- ***Ensuring compliance audits aren't as time-consuming or stressful***

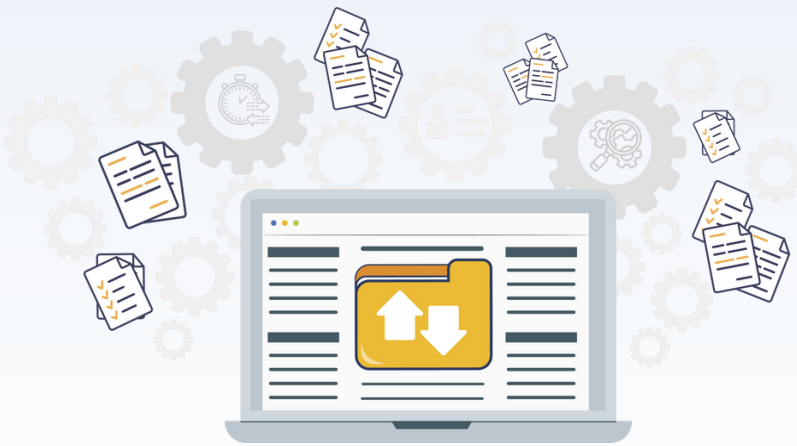
Records Management

As part of information governance, corporations, government entities, and non-profit organizations are required to create and implement a formal program to manage their records. In our view, every organization benefits from developing a Records Management or "RM" program. RM again differs from one organization to another but should include details on:

- ***Roles and responsibilities of employees***
- ***Records lifecycle***
- ***Records ownership***
- ***Audits***
- ***Legal holds***
- ***Sharing and access controls***
- ***Records maintenance***
- ***RM best practices and training***

RM programs are a critical component in any regulated organization but also form part of the best practice recommendations for any business looking to manage content effectively. Once established, RM programs:

- ***Ensure the organization is audit-ready – especially with the increasing number of standards and legislative pressures***
- ***Enable the discovery process in case of a lawsuit or fine***
- ***Control business-critical information, privacy, and security. Manual document processing lacks certain security features that electronic entries can provide, like encrypted passwords or restricted user access***



Migrating Content

After establishing the company's vision for taxonomy, architecture, information governance, and records management, many organizations look to deliver all of this via a single system. To achieve that, they look to pull content from various locations into a new, clean, single content management system or repository. Much like moving into a new home or office, though, taking everything but the kitchen sink is not always the preferred approach. A move is a great time to clear out old or redundant items.

Deciding to migrate current and legacy documents into one centralized repository can aid effective content management. However, without proper planning and some expert advice, many organizations have become victims of the misery of migration, rather than conquerors of consolidation.

There are some basic tenants of successful migration projects:

- ***Audit existing data and information to address potential issues before migration—a lot of content may be obsolete or outdated, or lacking the necessary metadata that makes it searchable***
- ***Ensure only valuable content is retained and moved—there's no need to try and move everything***
- ***Evaluate existing SharePoint deployments in need of migration—determine if all SharePoint content and sites need to be moved or whether any restructuring or consolidation is required before the move***
- ***Assure sensitive content is safely moved and secured***
- ***Conduct audits to ensure content has been successfully and correctly migrated***
- ***Have a rollback plan in case of issues***

Following proper planning, execution, and audit procedures ensures a successful migration, and that migrated content is not only centralized and secure but searchable and easily retrieved by the organization.

What's Next?

The best practices described above allow organizations to create an effective, robust, and integrated content management foundation. But that is not the end of the story. Modernizing content management systems is part of digital transformation, and just like digital transformation, content management is not a project but a continuous journey.

Modern organizations constantly adapt and improve the way they do things with the help of technology. Content management is no different—which is why intelligent document processing (IDP) has become a key focus for many enterprises.

Moving to Intelligent Document Processing

Once organizations have addressed the core planning and setup of a SharePoint Online environment to fully support Office 365 and Teams, they may consider adding even more functionality. For organizations looking to automate business processes and streamline workflows, extending SharePoint Online is a logical next step.

Among other capabilities, an intelligent document processing solution for SharePoint Online enables the automation of critical tasks such as document capture from multiple sources, classification of documents, and the automatic extraction of data for entry into ERP and line of business systems without the need for people to key it in.

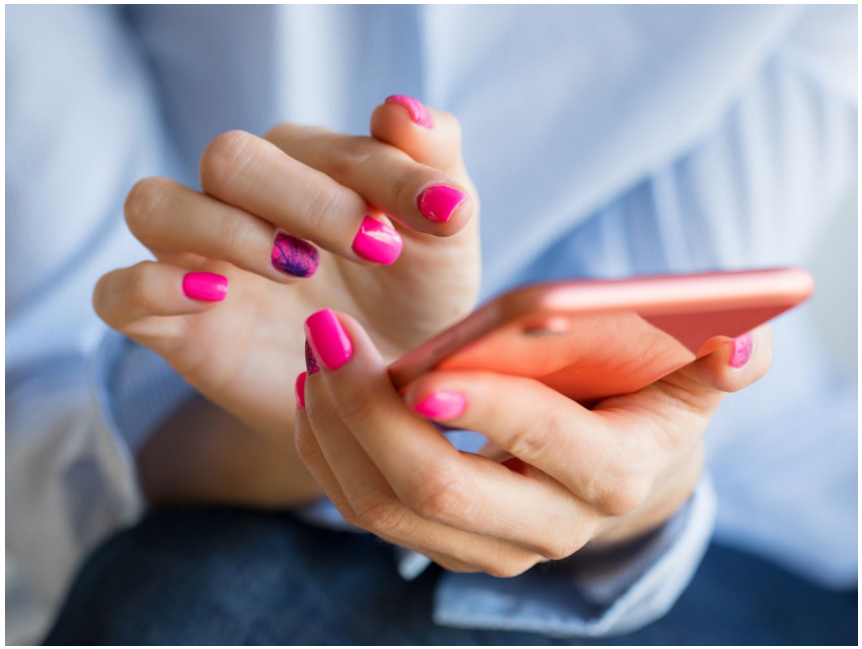
SharePoint Online in tandem with intelligent document processing solutions can empower individual departments and the overall organization—and significantly advance digital transformation goals.

There are four key factors to consider when evaluating an IDP solution, each of which are described below.

Is Content Accessible?

Even before COVID-19, people were doing business in coffee shops, offices, homes, and even mid-flight. Companies that want to attract and keep top talent need to offer professionals the flexibility to work anywhere with the ability to use a variety of devices.

Investigate platforms that allow administrators and users to leverage modern, lightweight, and responsive interfaces that can work with any device. For example, SharePoint Online paired with a browser-based document processing solution allows users to access what they need through any Internet-enabled device with a web browser.



Is Content Easier to Manage?

Data stored in separate and disparate business systems leads to lost productivity, long response times, and employee frustration. The ability to centralize documents and their data in SharePoint Online can boost collaboration, document sharing, and user engagement. Users shouldn't have to understand complicated hierarchies or folder structures to upload and route their data, or to access it later.

A document processing platform works seamlessly with the user — proactively advising them about the type of document and how it could be filed. Whether users are gathered within the same building, scattered across a campus, or dispersed globally, intelligent document processing ultimately enables humans to work smarter.

Eliminating information silos, speeding up business processes, and improving customer satisfaction by allowing employees to find information when they need it — all of these are core benefits of combining intelligent document processing and content management.

Is Capture Effective?

The scanning and importing of information in high or low volumes, from any source no matter the format or geographic location, is a vital capability for modern, remote-working organizations that need to capture paper documents as well as electronic content. Ideally, an organization should be able to consume content from desktop scanners, PCs, file shares, mobile devices, multi-function copiers, e-mail, and from Microsoft Office applications.

Data extraction from structured and unstructured information sources is an equally important part of capture. Structured data typically lives in databases and has a known format making it relatively easy to interpret and extract. Unstructured data is less friendly. This is the information stored in documents, videos, emails, invoices, and the like—and it constitutes the vast majority of most organizations' content.

To a human, the process of looking at a document and understanding what type of document it is (perhaps a bank statement for example) and what the information on the document means is based on experience. Traditionally this exercise has been challenging for computers, but modern document capture is changing that by providing intelligent document classification and data extraction. The metadata extracted during this process allows content to be intelligently indexed, routed to the right place, declared as a corporate record, and ultimately found quickly by users when needed. The chosen solution should make data extraction and interpretation

Does It Enhance the User Experience?

A key factor in the deployment of any new system is whether users will actually use the new system. So-called "user adoption" often hinges on whether the new system makes the average worker's life easier. If it does, and it's easy to learn, then adoption is likely to be high. If not, then adoption will struggle and possibly fail.

To encourage high user adoption, consider a platform that:

- ***Provides image enhancement capabilities, like removing coffee stains or straightening documents to improve document readability***
- ***Converts file types and automatically recognizes, categorizes, and tags documents with metadata to allow for faster search and retrieval later***
- ***Integrates seamlessly into Microsoft Teams, Office, and Outlook to allow users to work in the tools that they are used to working with***
- ***Automatically extracts and leverages the power of metadata to trigger and interact with business process workflows***
- ***Allows users to search in a targeted way, using the content's metadata, to get to the desired documents instantly***

Even if your goal is to create a centralized content management solution with a single repository, it will take time. In the interim, the selected platform should be flexible, with the ability to connect with various repositories. If one department within an organization uses SharePoint Online, other departments or campuses may still rely on SharePoint on-premises repositories, cloud storage, file shares, or line-of-business applications. Choose a technology that can seamlessly work with a wide array of repositories and systems to allow for the free flow of content and information, with minimal hassle and change to the end user.

Are You Future-Proof?

While an organization may have a solid grasp of current business needs, what about tomorrow? Does the organization plan to move to the cloud outright or deploy a staggered strategy to accommodate a hybrid environment? Does the strategy cover the management of additional document types, new use cases, or the potential for business mergers and acquisitions over time?

Businesses cannot afford to waste time and resources implementing tools that become expensive or cumbersome to manage over time. The new remote work environment favors the nimble and extensible. The faster the organization can go from idea to implementation, the more it can embrace opportunities to transform.

Choose a platform that is progressive, scalable, and designed with cloud-ready and hybrid-ready architectures in mind. Solutions like these can give you the option to expand, integrate with new applications, and otherwise evolve and enhance your information architecture to meet the changing needs of the organization.

The Future is Here

If recent history has taught us anything, it is that we need to be agile — as individuals, as a species, and as organizations. Many people joke that the biggest business driver for digital transformation "ever" has been COVID-19, and few can argue. Modern cloud-based technologies such as Microsoft Teams, Office 365, and SharePoint Online provide us with the perfect toolset to deliver that corporate agility day in and day out.

But agility is only one side of the coin. The other side, or the less appealing side if you like, is corporate compliance and information governance. These disciplines ensure the security of the content we store, the privacy of data that we process, and the governance of the actions that staff and organizations perform.

For many years, agility and compliance were like Batman and Bruce Wayne — never to be seen in the same place at the same time. But just like the Dark Knight and his corporate alter ego, organizations can embrace both agility and compliance.

Standardized concepts such as defined taxonomies, records information management controls, and legacy migrations are the IT guardrails that offer protection and peace of mind at the same time as enabling remote working, secure content sharing, and true digital transformation.

The best practices described in this eBook put forward a four-step approach. To goal is to take the liberation that users have found with MS Teams, Office, and SharePoint and combine it with traditional information management and corporate governance, creating a new vision of work for the future. A future where information is available to all, instantly, in a smart, digital, secure, agile, and compliant environment but with one person in mind — you!

About KnowledgeLake

With almost 20 years of Microsoft-centric content management technology and consulting expertise, KnowledgeLake maximizes your company's investment in Microsoft Office 365 by transforming SharePoint Online into an efficient document processing and management system.

KnowledgeLake assures your organization follows document management best practices – whether that's planning your organization's architecture and taxonomy, migrating content from file shares and existing repositories, or providing information governance and records management solutions. KnowledgeLake's innovative solutions can also effectively capture, upload, tag, route, search and govern your business content.

Learn more about how KnowledgeLake can help you leverage your Office 365 investment by visiting **www.KnowledgeLake.com**

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