Agenda

- Introduction
- What’s New
- Upgrade, Migration, and Integration
- Spotlight: Clifford Chance
- Conclusion
Microsoft SharePoint 2010

The **Business Collaboration Platform** for the **Enterprise** and the **Internet**

Deliver the Best Productivity Experience
Cut Costs with a Unified Infrastructure
Rapidly Respond to Business Needs
What’s New
SharePoint ECM

Foundational ECM

- Document Management
- Records Management
- Web Content Management
- Rich Media Management
- Document Output Management
- Human Centric Workflow
- E-mail Archiving*

Supplemental ECM

Embrace and Extend Workloads with Partners

- Physical Records Management
- Business Process Management
- Transactional Content Management
- Scanning and Capture
- Archiving and Library Services

* E-mail Archiving provided by Exchange
SharePoint Sites
Adoption made easier with the Office Ribbon UI

Contextual Ribbon In SharePoint

Cross-browser support

Familiar Office experience
Document Sets

- Document Set Properties
- Manage Different Types of Content as a Unit
- Customize page to provide context
- Individual Document Properties
- Document Set tab for Property, Version and Workflow Management
Unique Document IDs

Search for a specific Document ID

Document IDs are a property of the document
Enterprise Taxonomy

Taxonomy Term Store

Manage Terms Easily as Taxonomy Needs Change

Import Existing Corporate Taxonomy

Multi-lingual Support
Rich Integration with Office 2010

- Modify properties in the Office Backstage
- Modify Properties Using the Document Information Panel
- Browse Terms Hierarchically
- Keywords are Suggested While Typing
The Content Organizer

- Submissions matched to a content type
- Property based conditions route content
- Auto Provision folders based on properties or volume
- Specify alternate content type names to accommodate taxonomy differences
- Content is routed to a specified location
Improved in SharePoint 2010

- Records Management
  - “In Place” Record Management
- Enhanced Reporting and Auditing
- Disposition Policies
  - Multi Stage
- Legal Holds
- Search
  - Search Refinement
- Larger Content Databases
  - **Important:** Be Sure to Read the Fine Print: http://tinyurl.com/SP2010Boundary
Colligo Email Manager

- File, tag, find, view and share SharePoint files directly from Outlook
- Drag-and-drop email and attachments to SharePoint from Outlook
- Tag with extracted or custom metadata
- Replace attachments with links for easy collaboration
- Leverage SharePoint’s powerful capabilities from Outlook
- Seamless integration with Microsoft Office SharePoint Server 2010 and Microsoft Office 365
Getting to SharePoint 2010
Before you Begin...

- Understand Hardware & Software Requirements
- Analyze and Inventory
- Proof of Concept

Hardware and software requirements (SharePoint Server 2010):

Upgrading to SharePoint Server 2010
Upgrade/Migration

- Upgrade Approaches
  - In Place
  - Database Attach
  - Hybrid

- Migration Approaches
  - Partners
  - Tools

- Integrate/Interop
  - Third Party Connectors
  - RSS/Atom
  - Custom Development (BCS, etc.)
SharePoint and the Document Management Accelerators
Grant Newton
Document Management Accelerators

- Document Management
- Records Management
- Workflow
- Auditing and compliance
- Search
- Knowledge finding
- Blogs and wikis

The DMA’s provide:
- Consistent retrieval of content
- Productivity tools
- Governance mechanisms
Document Management Accelerators

Consistency
- Recent documents
- Recent sites
- Search

Productivity
- Compare
- Attachments
- Outlook attach
- Copy and move
- Related documents
- Documents I Own

Governance
- Site provisioning
- Site directory
- Metadata
DMA’s in action

1. Create a new document and save to a matter
2. Open a document, make edits and save
3. Compare document versions, create comparison, send latest version with comparison
4. Receive a document via email, save as a new version of an existing document
5. Move a document from one matter site to another
6. Look for a document in a matter by filtering and then by searching
Scenario 1 - Create a new document and save to a matter

Business Context:
The Partner would like you to create a new Word document using the agreement template with the initial information provided and save it to the Matter site “Project Bishop” making sure that they are the Document Owner.
Scenario 1 - Create a new document and save to a matter

Use the standard MS Office options to Save.
Scenario 1 - Create a new document and save to a matter

Access to SharePoint is provided through the standard Save dialog box.

Recent Sites provides you locations where you have recently been saving and editing documents.
Scenario 1 - Create a new document and save to a matter

Search provides you with options to look for a site.
Scenario 1 - Create a new document and save to a matter

Select the site you want to save the document to.
Scenario 1 - Create a new document and save to a matter

Shows the other documents already saved to the site
Click save to add the new document to the site
Scenario 1 - Create a new document and save to a matter

Update the Document Owner
Scenario 1 - Create a new document and save to a matter

Look for the Document Owner

Select the Document Owner
Scenario 2 - Open a document, make edits and save

Business Context:
You need to update a document you have recently been working on with a number of changes provided by your Partner.
Scenario 2 - Open a document, make edits and save

### My Recent Documents

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<thead>
<tr>
<th>Type</th>
<th>Name</th>
<th>Document ID</th>
<th>Ver</th>
<th>Action</th>
<th>Site</th>
<th>Modified By</th>
<th>Modified</th>
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<td>Clifford Chance Demonstration Document.docx</td>
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<td>11179-3-347</td>
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<td>08/08/2011 14:12</td>
<td></td>
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<td>11179-3-118</td>
<td>2.4</td>
<td></td>
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<td>20/07/2011 11:31</td>
<td></td>
</tr>
<tr>
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<td></td>
<td>Newton, Grant (IT-LCN)</td>
<td>20/07/2011 11:31</td>
<td></td>
</tr>
</tbody>
</table>

Select the document you want to edit

Select Edit on pop-up
Scenario 2 - Open a document, make edits and save
Scenario 2 - Open a document, make edits and save

Complete Edits in MS Word and then Save the document
Scenario 3 - Compare document versions, create comparison, send latest version with comparison

Business Context:
It is late at night, you are a Trainee and have been instructed by a Partner to make final edits on a document and create a new Major version before the document is sent to the client. You have been asked to email the Partner the Major version and the PDF comparison.
Scenario 3 - Compare document versions, create comparison, send latest version with comparison

Complete the edits as instructed and publish as a major version.
Scenario 3 - Compare document versions, create comparison, send latest version with comparison
Scenario 3 - Compare document versions, create comparison, send latest version with comparison

Compare provides an option to get a document from SharePoint.
Scenario 3 - Compare document versions, create comparison, send latest version with comparison

Select the document you wish to compare
Scenario 3 - Compare document versions, create comparison, send latest version with comparison

Ability to pick which versions to compare
Scenario 3 - Compare document versions, create comparison, send latest version with comparison

Compare completed and now need to save it as an attachment
Scenario 3 - Compare document versions, create comparison, send latest version with comparison

Option provided from within MS Word
Scenario 3 - Compare document versions, create comparison, send latest version with comparison

Original file selected and a file name provided

OK to attach the document
Scenario 3 - Compare document versions, create comparison, send latest version with comparison

From within Outlook you have the ability to attach documents from SharePoint.
Scenario 3 - Compare document versions, create comparison, send latest version with comparison

Can select original, attachment(s) and/or previous versions all from one location
Scenario 3 - Compare document versions, create comparison, send latest version with comparison

Adds the documents, attachments and versions selected to the email. Can be copies and/or links
Scenario 4 - Receive a document via email, save as a new version of an existing document

Business Context:
The client has returned the document you sent to them with a number of edits they have made directly into the original document. In order to keep these changes, you decide to save it into the document management system.
Scenario 4 - Receive a document via email, save as a new version of an existing document

Right click the file provides a “Save As” option
Scenario 4 - Receive a document via email, save as a new version of an existing document

Select the site that the original document is in
Scenario 4 - Receive a document via email, save as a new version of an existing document

Select the original document and click Save.
Scenario 4 - Receive a document via email, save as a new version of an existing document

Yes creates a new minor version of the existing document.
Scenario 4 - Receive a document via email, save as a new version of an existing document

In the My Site view you can see the document has been updated as a new minor version.
Scenario 5 - Move documents from one matter site to another

Business Context:
Prior to the matter inception process been completed, several correspondence documents relating to the new matter were created and you have now been instructed to move them to Project Access Test, which has now been set up.
Scenario 5 - Move documents from one matter site to another

Select the documents you want to move

Copy/Move feature
Scenario 5 - Move documents from one matter site to another

Either select the site you want to move to or search.
Scenario 5 - Move documents from one matter site to another

Select the site from search
Scenario 5 - Move documents from one matter site to another

You can then move the documents to the new site.
Scenario 6 - Look for a document in a matter by filtering and then by searching

Business Context:
Your Partner needs you to update a document in a long running matter, but he cannot remember the name of the document and has provided you with the following information that may help find it; Grant Newton is the document owner, the matter was possibly Project Jigsaw and it was for the client Arctic Global Finance.

Project Jigsaw is still in your list of sites.
Scenario 6 - Look for a document in a matter by filtering and then by searching

You can filter for documents by Document Owner
Scenario 6 - Look for a document in a matter by filtering and then by searching.
Scenario 6 - Look for a document in a matter by filtering and then by searching

Filtered results only shows one document

Search to see if any documents in this list contain “Arctic Global Finance”
Scenario 6 - Look for a document in a matter by filtering and then by searching

result returned, so change the search to be for “Arctic Global Finance” and then look to refine the
Scenario 6 - Look for a document in a matter by filtering and then by searching

Expanded search results that can be filtered by using the refiners in the left-hand navigation.
SharePoint and the Document Management Accelerators