
ECM Solutions For Sleeman Breweries



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Introduction

For the content management project, the group members have decided to use a real company called the Sleeman Brewery company. Sleeman Brewery is a company that brews and distributes their products to local stores. Sleeman Brewery have a variety of products such as Sapporo, Unibroue, Okanagan Spring, Old Milwaukee and many more. Unfortunately, Sleeman Brewery that is located in Delta does not have SharePoint which makes their operation inefficient and less competitive compared to other brewery companies that do have SharePoint. Having SharePoint for the Sleeman Brewery located in Delta will make their operations more efficient because within the brewery company, the departments such as human resources, marketing, and accounting will be able to exchange information more efficiently. Also, by having SharePoint, the administrator can apply permission to the documents so that only certain departments in the Sleeman brewery company can have access to the documents and other departments would not have permission to access those documents that have been uploaded on SharePoint.

Interview Questions

What do you know about the company?

Sleeman Brewery is a company that creates and distributes a variety of alcoholic beverages to local stores. Sleeman Brewery provides a variety of alcoholic beverages to their customer to consume. Sleeman Brewery started in 1834. Sleeman Brewery was founded by John H. Sleeman and the company is located all over Canada.

How many Departments do you have?

The Sleeman Brewery company has six departments, Accounting, Marketing, Supply Chain, IT, Human Resources, and Customer Services.

How does the company operate?

Sleeman company has different departments that do certain tasks. For example, the human resources department would receive a resume from a person who is interested in working at Sleeman, the person working at human resource would read the resume and called the person to set time and date. After the interview, the human resource department would let the individual know if he or she should be hired and work for the company. Another department such as the IT department would operate by receiving a ticket from the ticket website, determine how to help the person (email, phone, or in-person) and then fulfil the request. The department of finance operates by receiving invoices and then they would audit the invoice and after the finance department audits the invoice they would end with having a final statement.

What are the benefits of ecm solutions?

Having an ecm solution for Sleeman Brewery will benefit the company by, being able to exchange information more effectively, being able to update documents more quickly, improving transparency, cost reduction, and time saving. Also, having an ecm solution for Sleeman, it will make the company more competitive compared to other brewery companies.

What are the disadvantages of not having ecm solutions?

By not having an ecm solution, it will make Sleeman brewery less competitive compared to other companies which will result in less financial income for the company. Another disadvantage of not having ecm solution is, it will make it difficult to exchange documents between departments, which will cost the company time and money. Furthermore, by not implementing ecm solution, the company will have to spend more time and money on security of documents because they cannot simply add permission to the document so that only certain departments can have access to those documents.

Interviewee Contact Information

Inderjit Singh

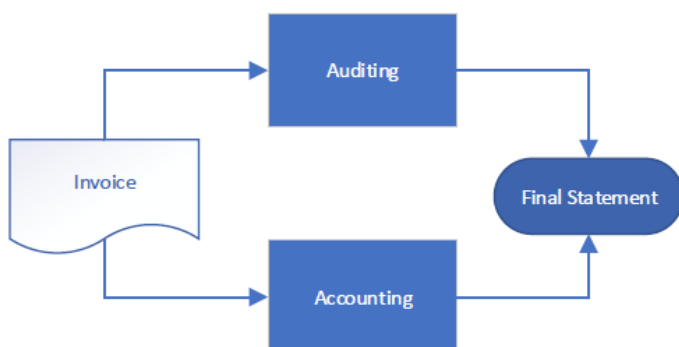
Manager

204-930-2242

Departments

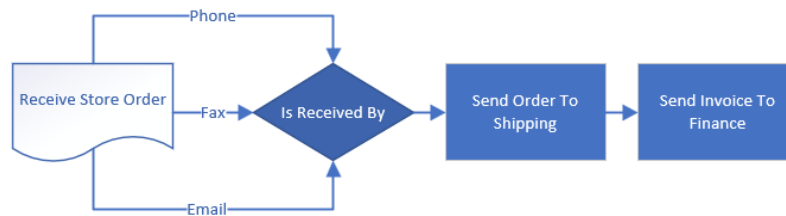
Finance: 2 employees, 1 manager

There are three people who work in finance. One manager and two employees. They take care of all invoices, cheques, credits, and payments. There are monthly and annual projects that the finance department works on, such as auditing, accounting, and creating financial statements.



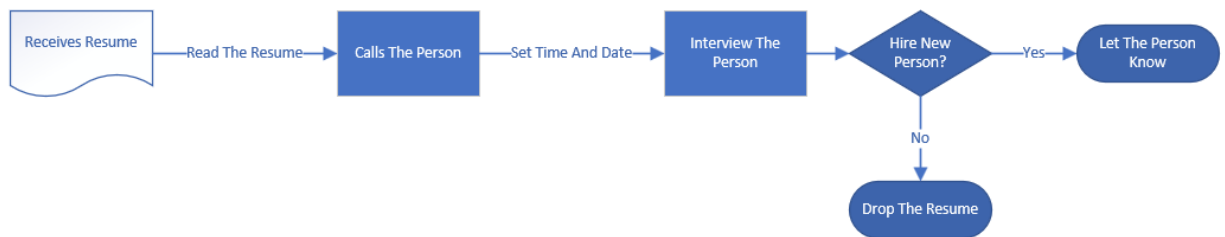
Customer Service: 4 employees, 1 manager

This department communicates with store owners and take their orders. They get orders through fax, phone, and email. After they received the order, they enter it in the system when they book the order both finance department and customer receive the invoice. Finance use it to charge the customer and customers keep for records.



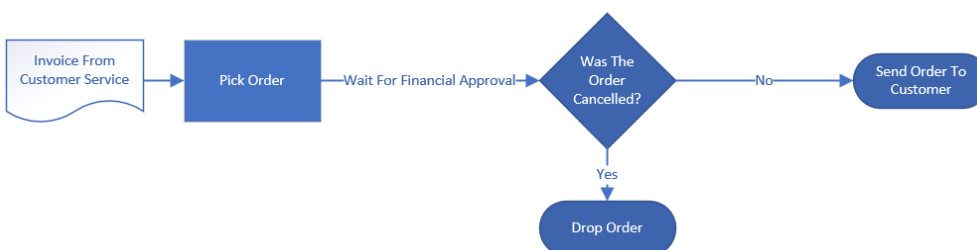
Human Resources: 2 employees, 1 manager

Sleeman only has 2 employees working in the HR department. One of them is a manager. They take care of all the hiring related process. They enforce the policies in the organization, they make sure the organization is working under rules and regulations.



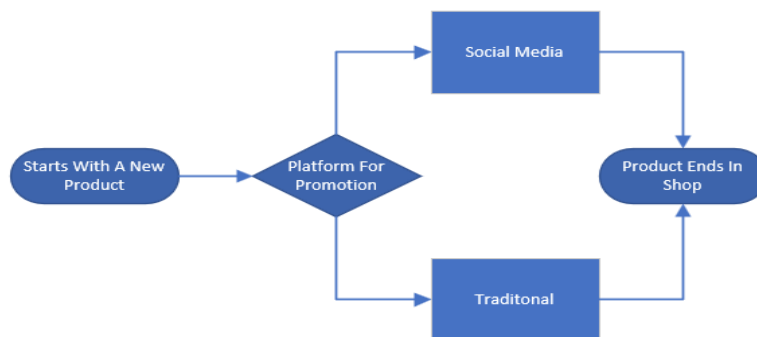
Shipping and receiving: 4 employees, 1 supervisor

This department comes into action after customer placed his order with customer service. Customer service representative. create the order and send the invoice to the shipping department where they start picking the order. While they pick the order, they also wait for approval from the finance because sometimes orders get cancelled.



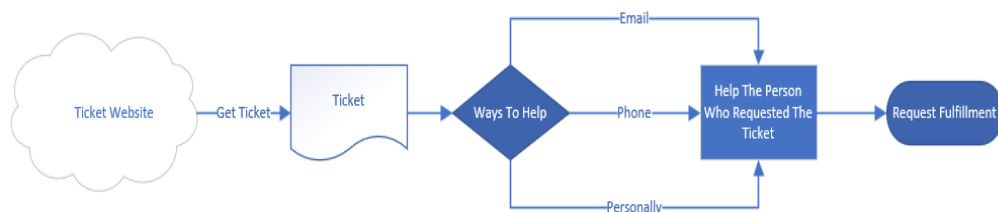
Marketing: 2 employees, 1 manager

This department takes care of all the promotion of new products that launch. They produce new ideas and way to advertisement. They decide which platform to use for advertising. They go meet all the shop owner and discuss with them how they can promote their products in their store. They try to convince the shop owners to give them more shelf space in the store.



Information Technology: 2 employees

Sleeman Brewery has only one technician on site. He takes care of all the tickets that people submit when they have any problem with their printers, workstations, or laptops. IT manager is in Guelph, Ontario. Big projects for Sleeman breweries are rolling out windows 10 and replace computers that do not support windows 10.



Part 1 - Implementation

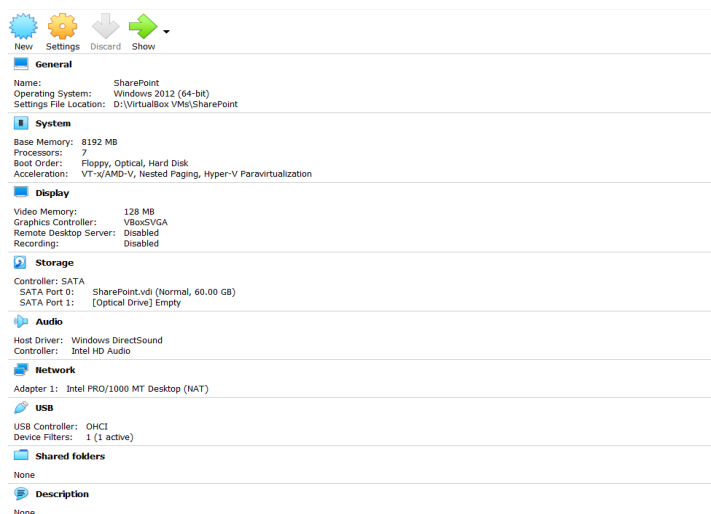
Creating Virtual Machine on VirtualBox

Step 1: Click *New* and then give the virtual machine name, select the machine folder, type and version of the operating system.

Step 2: Select the RAM and then *Create a virtual hard disk now*.

Step 3: Select *VDI(VirtualBox Disk Image)* for hard disk file type and *dynamically allocated* for storage on a physical hard disk.

Step 4: Select the size of virtual hard disk under the file location and size page.

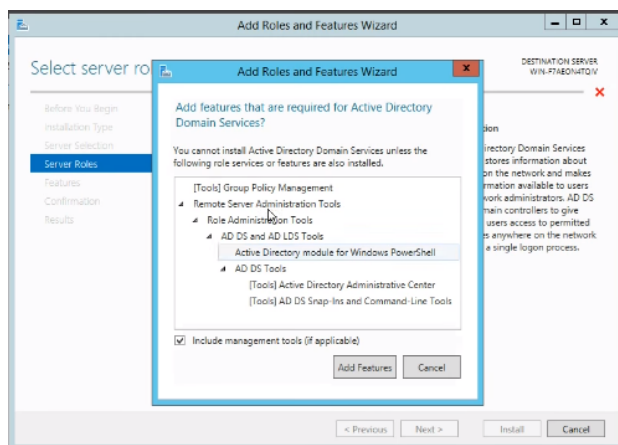


Step 5: Select the windows server 2012 iso file at the SATA port 1 to install the operating system.

Setting up Active Directory and Service Accounts

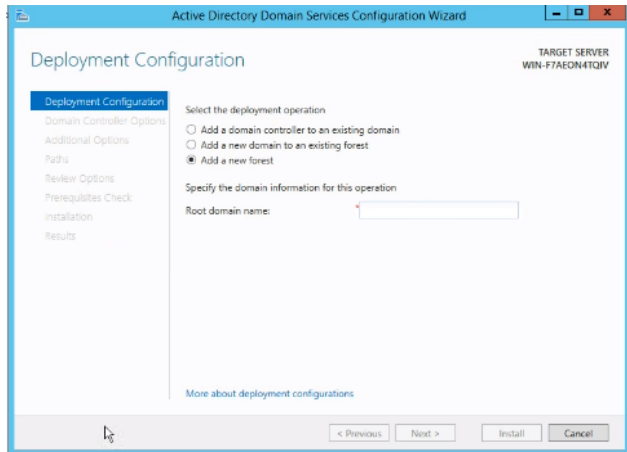
Step 1: On the server manager dashboard, click *Manager* and then click *Add Roles and Features*.

Step 2: Select *Role-based or feature-based installation* for installation type and then click the *Active Directory Domain Services*, click *Add feature* on the pop-up window.



Step 3: Click next until the confirmation page and then click install button.

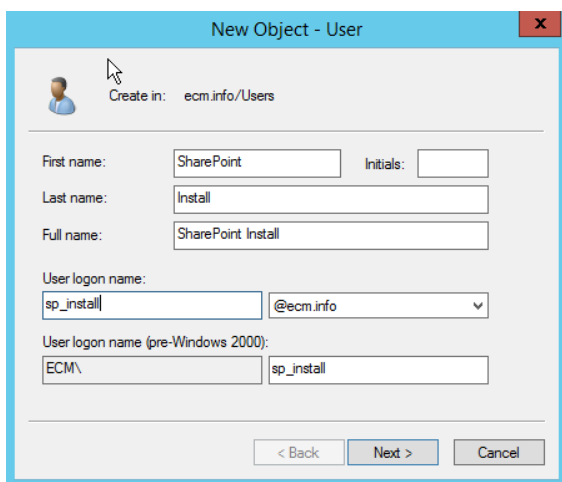
Step 4: Click the flag with a yellow warning logo and then click *Promote this server to a domain controller*, select *Add a new forest* and then type the domain type *info.ecm* in the textfield.



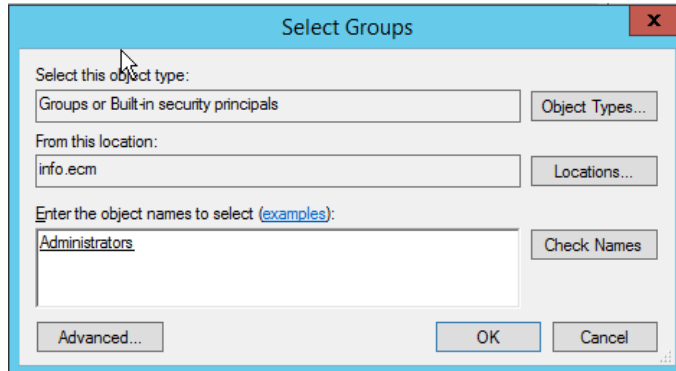
Step 5: Type the *Directory Services Restore Mode (DSRM)* password, click *next* until the last page and then click *install*.

Step 6: On the server manager dashboard, click *Tools* and then click *Active Directory Users and Computers*, enter the *Users* folder and right click and then

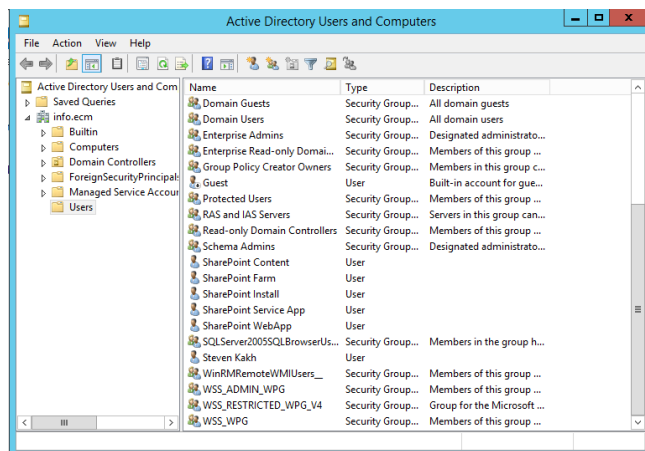
Select *New* and then select *User*. User first name is SharePoint and last name is Install and set the password.



Step 7: Right click the SharePoint user and select *Properties*, add SharePoint user into the *Administrators* group under the *Member Of* tag.



Step 8: Repeat step 6 to create SharePoint WebApp, SharePoint Service App, SharePoint Farm and SharePoint Content users.



Setting up DNS

Step 1: Search *DNS* and open *DNS Manager*, under *forward lookup zones* and *info.ecm*, right click and select *New Alias CNAME*, use *dev* as *alias name* and *host name* as the *Fully Qualified Domain Name (FQDN)* for target host.

New Resource Record

Alias (CNAME)

Alias name (uses parent domain if left blank):
dev

Fully qualified domain name (FQDN):
dev.info.ecm.

Fully qualified domain name (FQDN) for target host:
win-intd1uh01v4.info.ecm Browse...

☐ Allow any authenticated user to update all DNS records with the same name. This setting applies only to DNS records for a new name.

OK Cancel

Step 2: Repeat the step 1 to create a new alias called my, using the same fully qualified domain name from the step 1.

New Resource Record

Alias (CNAME)

Alias name (uses parent domain if left blank):
my

Fully qualified domain name (FQDN):
my.info.ecm.

Fully qualified domain name (FQDN) for target host:
win-intd1uh01v4.info.ecm Browse...

☐ Allow any authenticated user to update all DNS records with the same name. This setting applies only to DNS records for a new name.

OK Cancel

Part 2 - SQL Server & SharePoint

Installing SQL Server

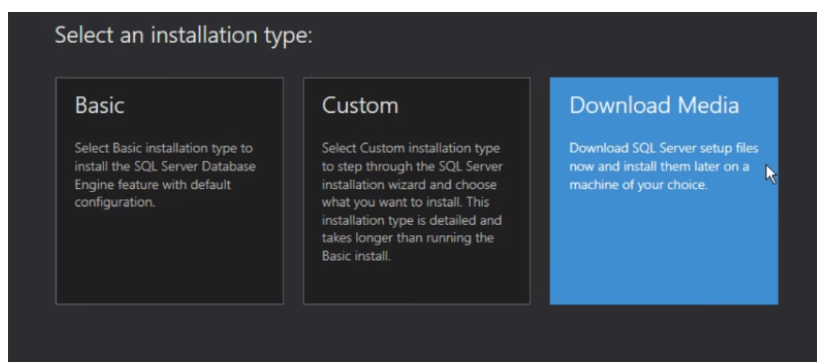
Step 1: Open up Internet Explorer within windows server 2012 R2, go to *google.com* and type *SQL Server Express 2016* in the search bar, download the *SQL Server 2016 SP2 Express* edition.

Microsoft® SQL Server® 2016 Service Pack 2 (SP2)

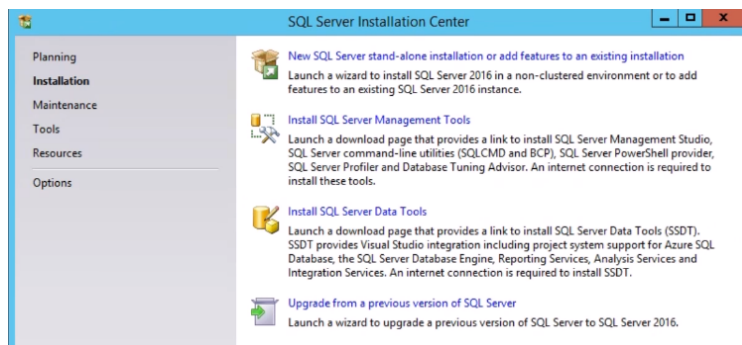
Important! Selecting a language below will dynamically change the complete page content to that language.

Select Language: [Download](#)

Step 2: Click *Download Media* and then select *Express Core*, waiting for the download and then open the SQLEXPRESS_x64_ENU the program.

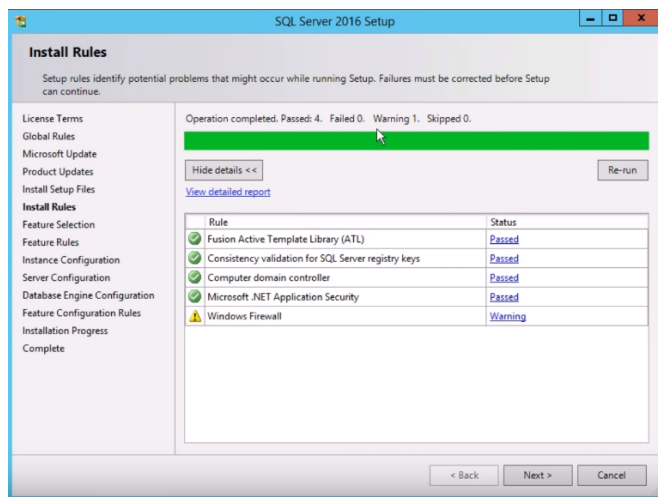


Step 3: On the *SQL Server Installation Center* dashboard, click the *Install SQL Server Management Tools* and then download the *SQL Server Management Studio*.

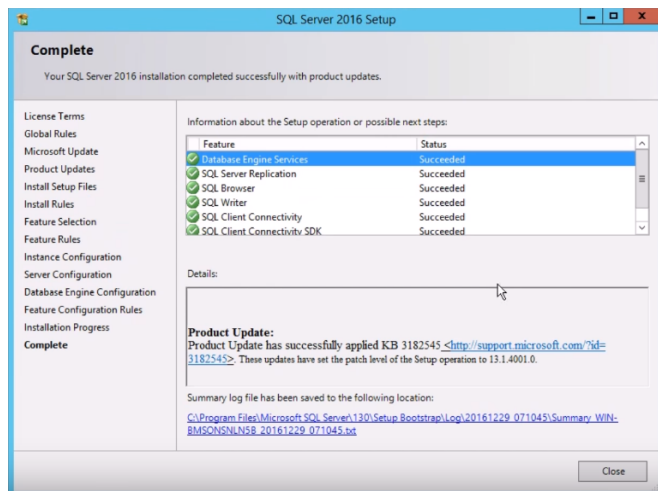
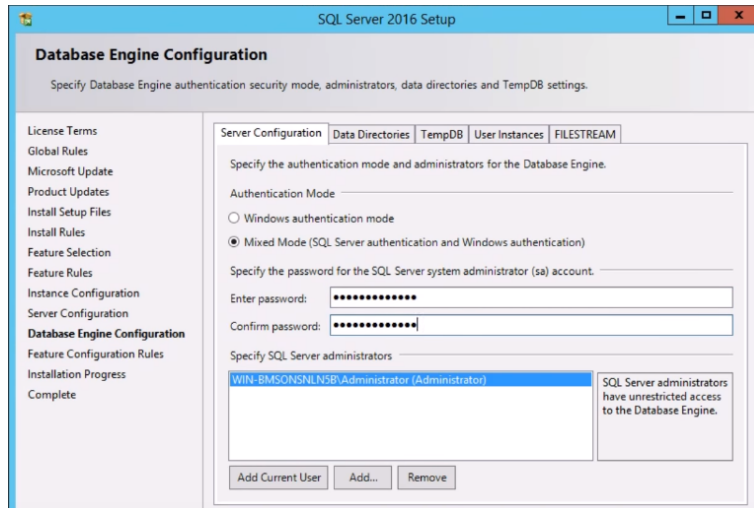


Step 4: On the *SQL Server Installation Center* dashboard, click *New SQL Server stand-alone installation or add features to an existing installation*, check the *I accept the license terms* on the *License Terms* and check the *Use Microsoft Update to check for updates (recommended)* on the *Microsoft Update*.

Step 5: Check the *Database Engine Services*, *SQL Server Replication*, and *SQL Client Connectivity SDK*, and then check *Grant Perform Volume Maintenance Task privilege to SQL Server Database Engine Service* on the *Server Configuration*.



Step 6: Select the *Mixed Mode (SQL Server authentication and Windows authentication)* and set up the *password*.



Step 7: Open the *SSMS-Setup-ENU* program to install Microsoft SQL Server Management Studio.

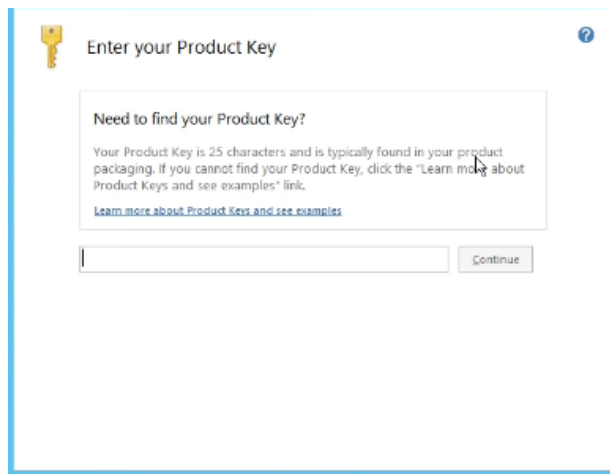
Installing SharePoint

Step 1: Shut down the VM and choose the SharePoint.iso file for the SATA port 1 on the dashboard of virtualbox.

Step 2: In the DVD drive folder, open the *prerequisiteinstaller* program. Click *next* and then check the *I accept the terms of license Agreements*. Restart the operating system after the downloading is done.

Step 3: In the DVD drive folder, open the *setup* program and then waiting for the progress of installing for prerequisite. Click *finish* after the installation is completed.

Step 4: Open the setup program again and enter the product key. Check the *I accept the terms of agreements* and then click *continue*. Click *install now* on the file location page.



Step 5: Click *next* on the SharePoint Products Configuration Wizard. Select *create a new server farm* and then click *next*. Enter the *database server, username, and password* and then click *next*.

Step 6: Enter the *passphrase* and confirm it. Enter the *specific port number* and then click *next*.

Part 3 - ECM Solution

Document Management

1. Define the documents, content types, and metadata

Step 1: Determine what kind of documents you want to store on SharePoint. For example, invoices, purchase orders, and receipts.

Step 2: Define different types of documents you want to store on SharePoint. For example, if you are uploading financial documents, define different types of financial documents such as purchase orders, invoices, etc.

Step 3: Define the metadata for each of the documents. For example, if you are storing invoice document, define the metadata of the invoice document (Date Paid, client, etc).

Step 4: Define the property/column for each metadata. For example, Date, text fields, menu, etc.

2. Create a new content type and add the metadata to it

Step 1: Create a new content type. On the ECM Brewery site collection, click the *Site Gear Icon > Site Settings > Site content types > Create*

ECM Brewery Human Resources Marketing Finance Customer Service Shipping and Receiving Information T

Site Settings ▸ Site Content Types

Create

Show Group: All Groups ▼

Step 2: On the *New Site Content Type* page, enter the name and *description* and then select the *parent content type from* and *parent content types*.

ECM Brewery Human Resources Marketing Finance Customer Service Shipping and Receiving Information T

Site Content Types ▸ New Site Content Type ⓘ

Name and Description
Type a name and description for this content type. The description will be shown on the new button.

Name: Employee Schedule

Description:

Parent Content Type
Select parent content type from:
Document Content Types ▼

Parent Content Type: Document ▼

Descriptions:
Create a new document.

Group
Specify a site content type group. Categorizing content types into groups will make it easier for users to find them.

Put this site content type into:
☒ Existing groups: Custom Content Types ▼
☐ New group:

Step 3: After creating the new content types, they will show up under the *Site Content Types* page.

Site Settings » Site Content Types ①

Create Show Group: All Groups ▼

Site Content Type	Parent	Source
Business Intelligence		
Excel based Status Indicator	Common Indicator Columns	ECM Brewery
Fixed Value based Status Indicator	Common Indicator Columns	ECM Brewery
Report	Document	ECM Brewery
SharePoint List based Status Indicator	Common Indicator Columns	ECM Brewery
SQL Server Analysis Services based Status Indicator	Common Indicator Columns	ECM Brewery
Web Part Page with Status List	Document	ECM Brewery
Community Content Types		
Category	Item	ECM Brewery
Community Member	Site Membership	ECM Brewery
Site Membership	Item	ECM Brewery
Custom Content Types		
Employee Evaluation	Document	ECM Brewery
Employee Schedule	Document	ECM Brewery

Step 4: Under each content type page, click the *Add from new site column* for creating metadata.

Step 5: Enter the *column name* and select the *type of information in this column*.

ECM Brewery Human Resources Marketing Finance Customer Service Shipping and Receiving Information 1

Site Columns » Create Column ①

Name and Type

Type a name for this column, and select the type of information you want to store in the column.

Column name:

The type of information in this column is:

- ☐ Single line of text
- ☐ Multiple lines of text
- ☐ Choice (menu to choose from)
- ☐ Number (1, 1.0, 100)
- ☐ Currency (\$, ¥, €)
- ☒ Date and Time
- ☐ Lookup (information already on this site)
- ☐ Yes/No (check box)
- ☐ Person or Group
- ☐ Hyperlink or Picture
- ☐ Calculated (calculation based on other columns)
- ☐ Task Outcome
- ☐ Full HTML content with formatting and constraints for publishing
- ☐ Image with formatting and constraints for publishing
- ☐ Hyperlink with formatting and constraints for publishing
- ☐ Summary Links data
- ☐ Rich media data for publishing

Columns	Type	Status	Source
Name	File	Required	Document
Title	Single line of text	Optional	Item
Receive Date	Date and Time	Optional	
Attendance Description	Multiple lines of text	Optional	

3. Add a template to content type

Step 1: Click *Advance setting* under the site content type page and then select the *Upload a new document template*. Click *Browse* to select the template for this content type.

ECM Brewery Human Resources Marketing Finance Customer Service Shipping and Receiving Information T

Site Content Type - Advanced Settings

Document Template
Specify the document template for this content type.

☐ Enter the URL of an existing document template:

☒ Upload a new document template:
C:\Users\Administrator\Documents\Human Resource [Browse...](#)

Read Only
Choose whether the content type is modifiable. This setting can be changed later from this page by anyone with permissions to edit this type.

Should this content type be read only?
☐ Yes
☒ No

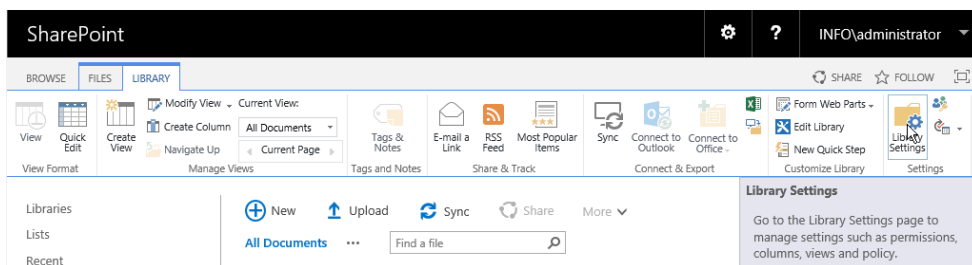
Update Sites and Lists
Specify whether all child site and list content types using this type should be updated with the settings on this page. This operation can take a long time, and any customizations made to the child site and list content types will be lost.

Update all content types inheriting from this type?
☒ Yes
☐ No

[OK](#) [Cancel](#)

4. Add the content type to the document library

Step 1: Go to the site collection, click *Documents* at left side and then click *library* at the top. Click *library settings* and then select *advanced settings*. Set the *Allow management of content types* to Yes and then click OK.



ECM Brewery **Human Resources** Marketing Finance Customer Service

Settings ▸ Advanced Settings

Content Types

Specify whether to allow the management of content types on this document library. Each content type will appear on the new button and can have a unique set of columns, workflows and other behaviors.

Allow management of content types?

☒ Yes ☐ No

Step 2: Click *Add from existing site content types* under the Settings page. Select *site content type from first*, choose the *available site content types* and then add to the *content types to add*.

ECM Brewery **Human Resources** Marketing Finance Customer Service Shipping and Receiving Information Tech

Settings ▸ Add Content Types ⓘ

Select Content Types
Select from the list of available site content types to add them to this list.

Select site content types from:
Custom Content Types ▼

Available Site Content Types:

Content types to add:
Employee Schedule

Add >

< Remove

Description:
None

Group: Custom Content Types

OK Cancel

Step 3: If the user click *New Document*, the new template is available.

Form Management

Creating a Form:

To create a custom form you will have to down Microsoft InfoPath 2013 and SharePoint Designer 2013.

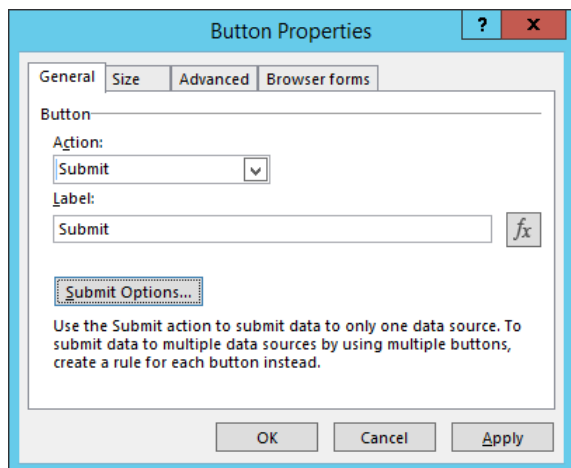
Step 1. Once your software is downloaded, open up **InfoPath 2013** and click on **SharePoint Form Library**. Give the Form an Appropriate name.

Step 2: In **Controls**, click the down arrow and choose **Section**.

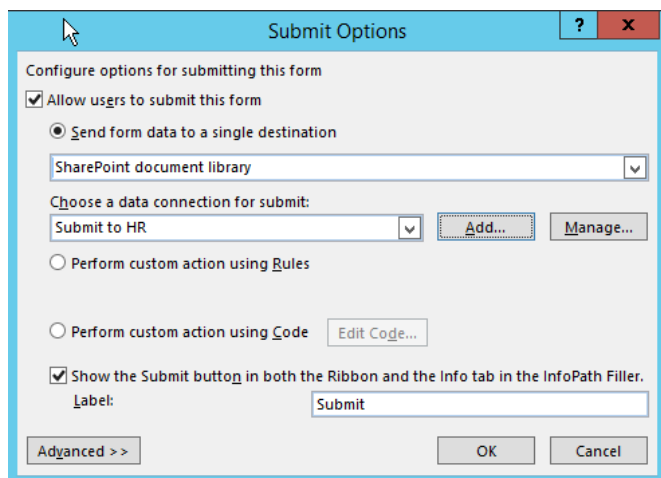
Step 3: Underneath **MyFields** change the properties of **Group 1**, Change the name from group one to something appropriate. Next click on **INSERT** and insert a Table. Change the **subheading** name to the same name as you did for **group 1**. Fill out the table with relevant information.

Step 4: In the **Controls** give the cells the appropriate option, for example, in the cell next “Interview Date”, give the **Date and Time Picker** option. You can make as many sections are you like.

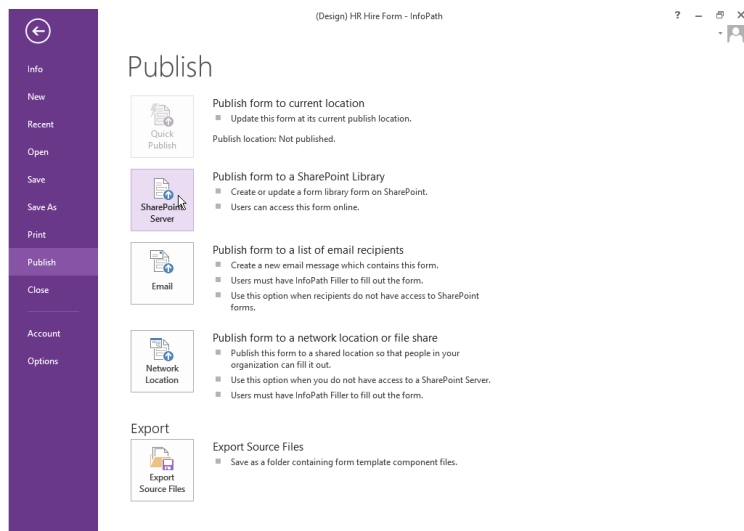
Step5: Drag a button at the end of the form. Right-click the button and click the control properties. Select the submit for the Action and then click submit options.



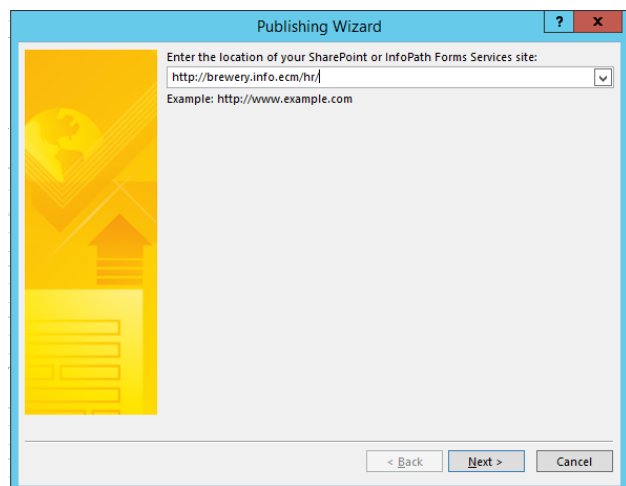
Step 6: Allows user to submit this form. Select SharePoint document library for the Send form data to a single destination. Click Add and input the URL of the site collection. Enter a name for this data connection.



Step 7: Click File at the right corner of InfoPath and then click publish to SharePoint server.



Step 8: Enter the location of the SharePoint server and then select the site content type. Select Create a new content type and then enter the name and description for this content type. Add columns to this content type.

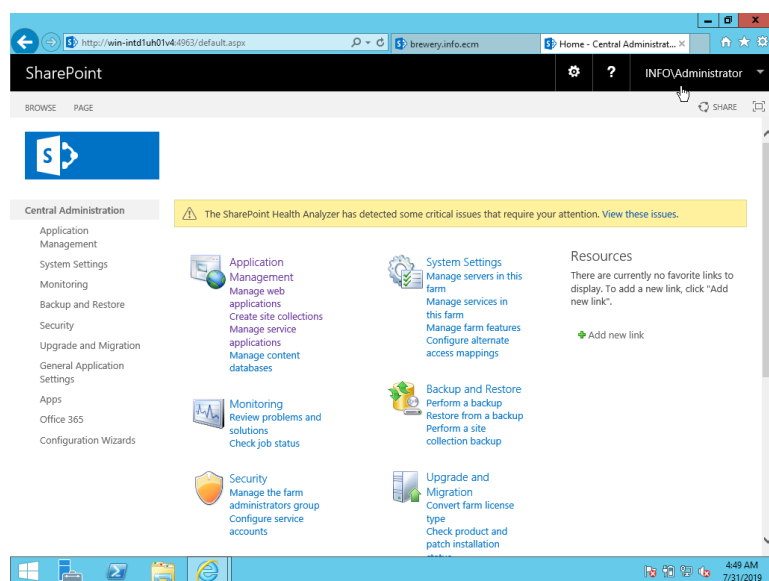


Web Management

Creating a New Web Application:

Step 1: Open up the **Central Admin Site**.

Step 2: Click on **Application Management**.



Step 3: Click on **Manage Web Applications**.

Step 4: Click on **New** (at the top left of the screen).

You should get a pop up that says “working on it...”. After it loads you will get a dialog box that says “Create New Web Application” on the top.



Step 5: In the **Name** dialog box; give your website an appropriate name. The name should be relevant to what your website is about.

Step 6: Give the Port number as **80**. Leave the Host-name blank.

Create New Web Application

application.

If you select an existing IIS web site, that web site must exist on all servers in the farm and have the same name, or this action will not succeed.

If you opt to create a new IIS web site, it will be automatically created on all servers in the farm. If an IIS setting that you wish to change is not shown here, you can use this option to create the basic site, then update it using the standard IIS tools.

Security Configuration

If you choose to use Secure Sockets Layer (SSL), you must add the certificate on each server using the IIS administration tools. Until this is done, the web application will be inaccessible from this IIS web site.

Claims Authentication Types

Choose the type of authentication you want to use

Name: ECM Brew

Port: 80

Host Header:

Path: C:\inetpub\wwwroot\wss\VirtualDirectories\80

Allow Anonymous

☐ Yes

☒ No

Use Secure Sockets Layer (SSL)

☐ Yes

☒ No

☒ Enable Windows Authentication

☒ Integrated Windows authentication

Step 9: Scroll down and add the port number at the end of the already-given Database name.

Create New Web Application

This defines the account and credentials that will be used by this service.

You can choose an existing application pool or create a new one.

Create new application pool

Application pool name

Select a security account for this application pool
 [Register new managed account](#)

Database Name and Authentication

Use of the default database server and database name is recommended for most cases. Refer to the administrator's guide for advanced scenarios where specifying database information is required.

Use of Windows authentication is strongly recommended. To use SQL authentication, specify the credentials which will be used to connect to the database.

Database Server

Database Name

Database authentication

☒ Windows authentication (recommended)

☐ SQL authentication

Account

Password

Step 10: Scroll to the bottom of the dialog box and click **Ok**.

You will get a big popup with the text “This shouldn’t take long.” in it. Depending on the speed of your internet connection; this process could take a long time.

Name	URL	Port
SharePoint - brewery.info.ecm80	http://brewery.info.ecm/	80
SharePoint Central Administration v4	http://win-intd1uh01v4:4963/	4963

Creating a Site Collection:

Step 1: Open up the **Central Admin Site**.

Step 2: Click on **Create Site Collection**.

Step 3: Choose the appropriate Web Application, Give an appropriate name and description.

Create Site Collection ①

Web Application
Select a web application.

Web Application: <http://brewery.info.ecm/> ▼

To create a new web application go to [New Web Application](#) page.

Title and Description
Type a title and description for your new site. The title will be displayed on each page in the site.

Title:

Description:

Web Site Address
Specify the URL name and URL path to create a new site, or choose to create a site at a specific path.

URL: <http://brewery.info.ecm/>

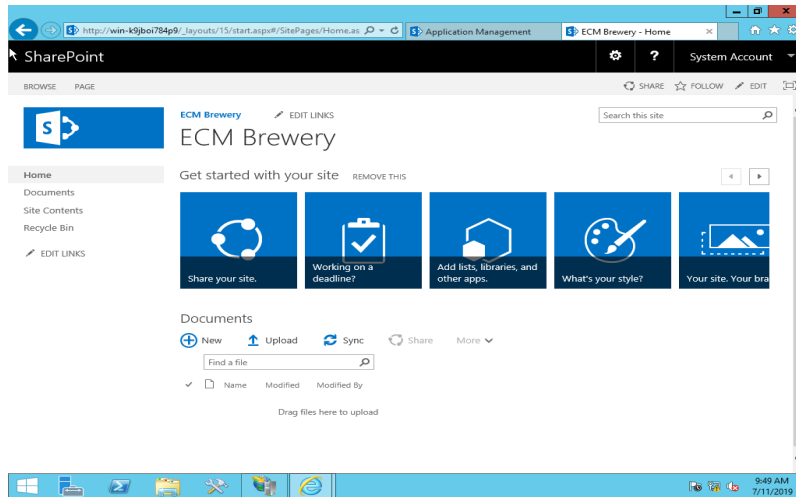
[To add a new URL Path](#) go to the

Step 4: Select **Team Site.**

Step 5: Provide a **Primary Site Collection Administrator.**

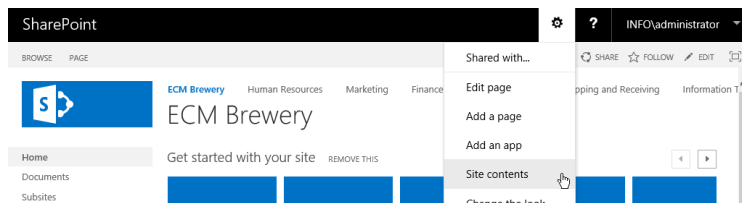
Step 6: Provide a **Secondary Site Collection Administrator. Go to the bottom and click **OK**.**

After a few minutes later you will be asked to open the URL for your site collection in a new tab. Copy and Paste the URL into the new tab and let the page load. This should take about 10 or so minutes. Once everything is loaded, you will get a website that looks like this:



Creating Sites in the Site Collection

Step 1: On the ECM Brewery site collection page, click the *Gear button* at the top and then select *Site contents*.



Step 2: Click *new subsite* at the bottom of the Site contents page. Enter the *Title*, *Description*, *URL name*, and select a *template*.

Site Contents › New SharePoint Site

Title and Description

Title:

Description:

Web Site Address

URL name:
http://brewery.info.ecm/

Template Selection

Select a template:

- Collaboration
- Enterprise
- Team Site**
- Blog
- Project Site
- Community Site

Step 3: Repeat step 2 for creating all of the departments.

SharePoint

INFO administrator

BROWSE PAGE

SHARE FOLLOW EDIT

ECM Brewery

Human Resources Marketing Finance Customer Service Shipping and Receiving Information Technology

Home

Documents

Subsites

Human Resources

Marketing

Finance

Customer Service

Shipping and Receiving

Information Technology

InfoPath

Site Contents

Recycle Bin

EDIT LINKS

Get started with your site

REMOVE THIS

Share your site.

Working on a deadline?

Add lists, libraries, and other apps.

What's your style?

Your site. Your brand.

Documents

New Upload Sync Share More

Find a file

Name Modified Modified By

Drag files here to upload

Enterprise Search

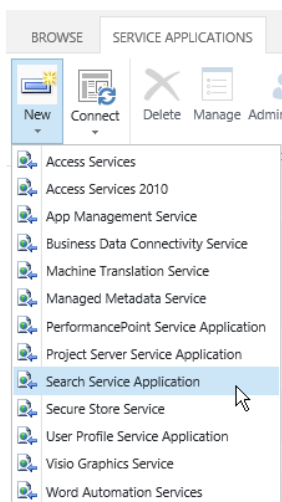
Setting up enterprise search:

Before setting up the search, Make a couple .txt files on the server and upload them to your SharePoint site.

Step 1: Open **Central Administration** Site.

Step 2: Click on **Manage Service Applications**.

Step3: Click on the arrow under **New** and click on **Search Service Application**.



You'll get a popup with "Working on it" followed soon by a dialog box with "Create New Search Service Application".

Step 4: Give the Service Application an appropriate name.

Step 5: click the radio button next to both instances of **Use existing application pool**, click on the arrow and choose **SharePoint Web Services System**. Scroll down and

click **OK** at the bottom of the dialog box, and wait for everything to load (Approx 10 mins).

Create New Search Service Application

Specify the properties for this Search Service Application. The settings you specify here can be changed later using the properties button in the Manage Service Applications page. [Help](#)

Application Pool for Search Admin Web Service
Choose the Application Pool to use for this Service Application. This defines the account and credentials that will be used by this web service.

You can choose an existing application pool or create a new one.

☒ Use existing application pool
SharePoint Web Services System

☐ Create new application pool
Application pool name:

Select a security account for this application pool
ECM\sp_farm ☒ [Register new managed account](#)

Application Pool for Search ☒ Use existing application pool

OK Cancel

Once everything is finished installing you'll see that you see that you installed ***your name* -- Search service application, *your name* -- Search service Application Proxy, and Search Administration Web Services for *your name* Search -- Search Administration Web Services Application.**

The screenshot shows the 'Manage Service Applications' page in a SharePoint environment. The left sidebar contains navigation links: Central Administration, Application Management, System Settings, Monitoring, Backup and Restore, Security, Upgrade and Migration, General Application Settings, Apps, Office 365, and Configuration Wizards. The main area displays a table of installed service applications.

Name	Type	Status
Application Discovery and Load Balancer Service Application	Application Discovery and Load Balancer Service Application	Started
Application Discovery and Load Balancer Service Application Proxy_1a34a808-7a39-4805-a1bd-feebb1d203dc	Application Discovery and Load Balancer Service Application Proxy	Started
ECM Brewery	Search Service Application	Started
ECM Brewery	Search Service Application Proxy	Started
Search Administration Web Service for ECM Brewery	Search Administration Web Service Application	Started
Security Token Service Application	Security Token Service Application	Started
WSS_UsageApplication	Usage and Health Data Collection Service Application	Started
WSS_UsageApplication	Usage and Health Data Collection Proxy	Stopped




The 'ECM Brewery' search service application and its associated proxy and admin web service are highlighted with a yellow box.


Step 6: Click on ***your name*** -- **Search service application**. Next, click on **Content Sources**, then **New Content Source**. Give an appropriate name, type in the URL of your SharePoint site, and click the radio button next to **Enable Incremental Crawl**.

Step 7: Go back to **Content Source** and run the crawl. This Crawl will take approximately 5 minutes.

ecm brew search: Manage Content Sources

Use this page to add, edit, or delete content sources, and to manage crawls.

 New Content Source |  Refresh |  Start all crawls

Type	Name	Status	Current crawl duration	Last crawl duration	Last crawl completed	Next Full Crawl	Next Incremental Crawl
	Local SharePoint sites	Idle		00:02:21	7/26/2019 6:17:48 PM	None	None

Step 8: Go back to your SharePoint site and type in the name of one of the .txt files and you'll get the results.

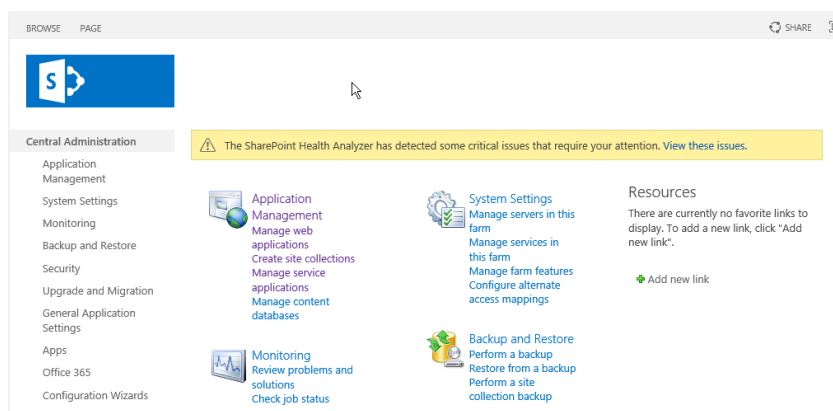
eDiscovery

Setting up eDiscovery

Step 1. Open up the **Central Admin Site**.

Step 2. Click on **Application Management**.

Step 3. Click on **Create Site Collections**.



Step 4. Choose the appropriate Web Application, Give an appropriate name and description.

Step 5. When selecting template, click on the enterprise tab and select **eDiscovery center**.

Template Selection



Select a template:

Collaboration Enterprise Publishing Custom

- Document Center
- In-Place Hold Policy Center
- eDiscovery Center**
- Records Center
- Business Intelligence Center
- Compliance Policy Center
- Enterprise Search Center
- My Site Host
- Community Portal
- Basic Search Center

A site to manage the preservation, search, and export of content for legal matters and investigations.

Step 6. Provide primary and secondary administrators name.

Step 7. click “Ok” and wait for the site to be created.

After a few minutes later you will be asked to open the URL for your site collection in a new tab. Copy and Paste the URL into the new tab and let the page load.

Configuring eDiscovery

Step 1. Enter the site address “<http://brewery.info.ecm/sites/sh>”.

Step 2. Click on “**Create a new case**”.

Step 3. Give an appropriate name and description.

Step 4. Give an appropriate website address.

Step 5. Select “**eDiscovery Case**” template.

Step 6. Click create and wait for the case to be created. It should look like this.

http://brewery.info.ecm/sites/sh/edisc/default.aspx Site Collection List

SharePoint

BROWSE PAGE

Home

ECM Brewery eDiscovery

eDiscovery Sets
Queries
Sources
Exports
Documents
Site Contents

Identify and Hold

eDiscovery Sets

[+ new item](#)

Name	Modified
There are no items to show in this view of the "eDiscovery Sets" list.	

In-Place Hold Status

0	Cannot Hold
0	Not On Hold
0	Processing
0	On hold with filter
0	On Hold
0	Failed

Search and Export

Queries

[+ new item](#)

Name	Modified
There are no items to show in this view of the "Queries" list.	

Export Status

0	Download Not Started
0	Download Started
0	Download Complete
0	Export Failed

Content Security

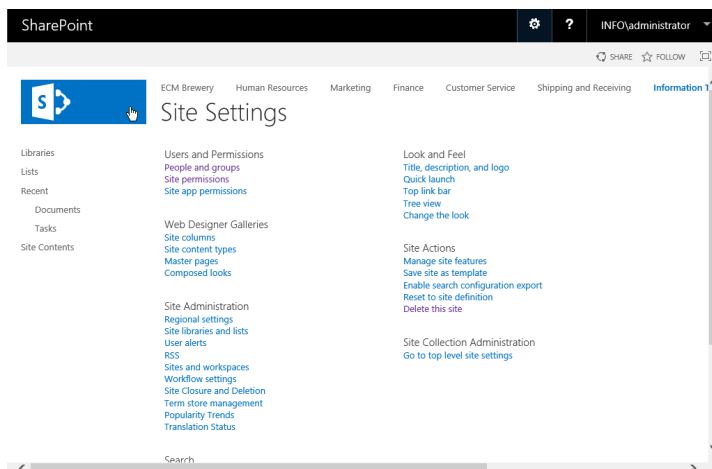
Setting up content Security:

Permissions should be assigned after the basic site structure is established, and a hierarchy of roles has been created. Fine-grained permissions can be set up for each user group to better control the types of data the group members can and cannot access. Each user group within the system should only be assigned access to the information which they require. For example, the customer group should only be able to access the front end data of the website, while the site admins would have access to the entire site as a whole. When adding new users to the system, make sure that they are assigned to the correct category.(Visitor, Member, or Owner).

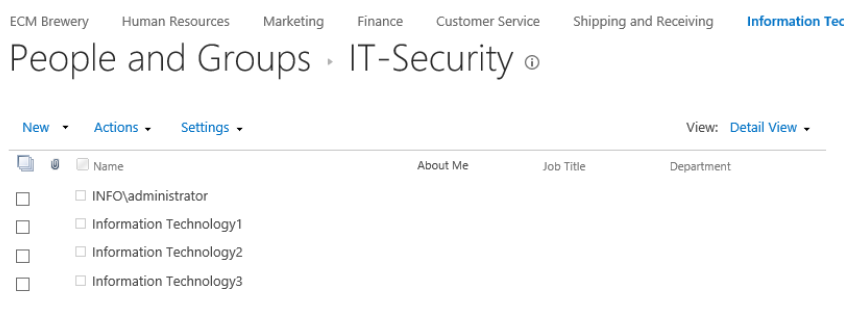
Permissions can be assigned directly to a user within a site, or be applied to a user once they are in a specific group. Using groups to manage permissions is the recommended method because it is more efficient and saves a lot of time.

Part 1 Creating a Group:

1. Navigate to the *Site Settings* page and select *People and Groups* to manage the group membership.



2. Select a group from the left navigation menu and click the New tab to display a drop down menu with the options to “add users” and “add users to this group”.
3. In the Share model window, add the name and email address for each user you want to add to the membership of the group. The option to add “Everyone” to the group will grant the groups permissions to every authenticated user.
4. Press the Share button to complete adding users to the SharePoint site group.

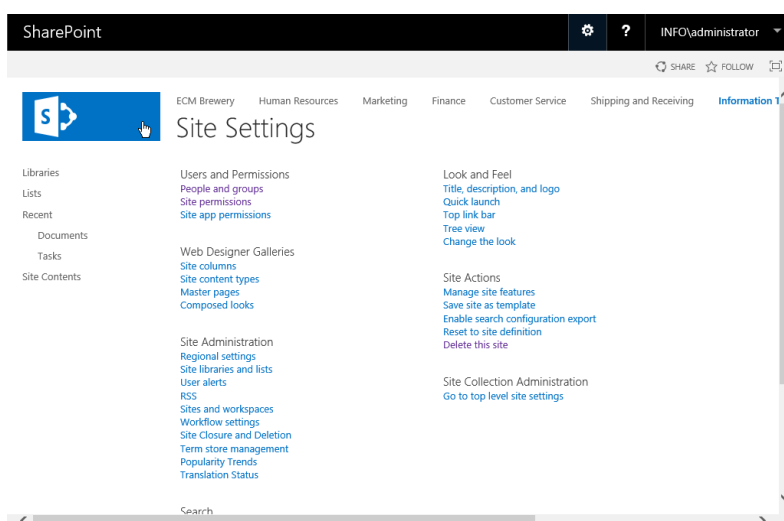


Permissions assigned to a group can be viewed by pressing the View Group Permissions menu option on the groups Settings drop-down menu. This allows you to view the groups permissions level assignments for both the site and every subsite in the

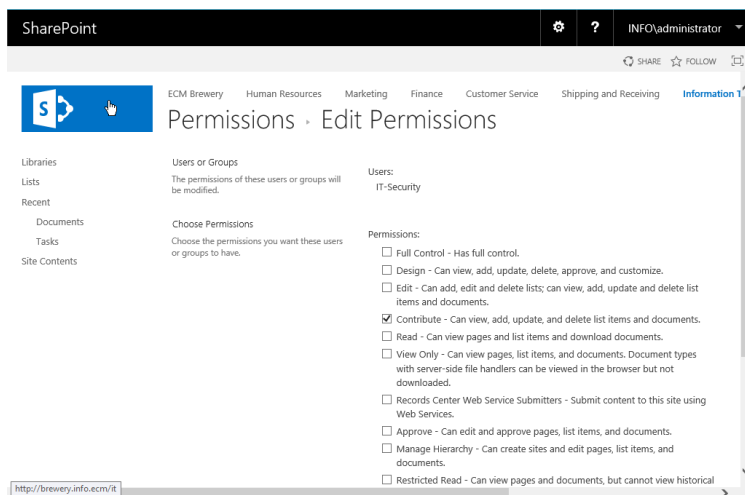
site collection. Permissions can be modified at any time from the Site Permissions Page.

Part 2 Group Permissions:

1. Go to the Sites Setting page and in the Users and Permissions section click Site Permissions to travel to the permissions page.



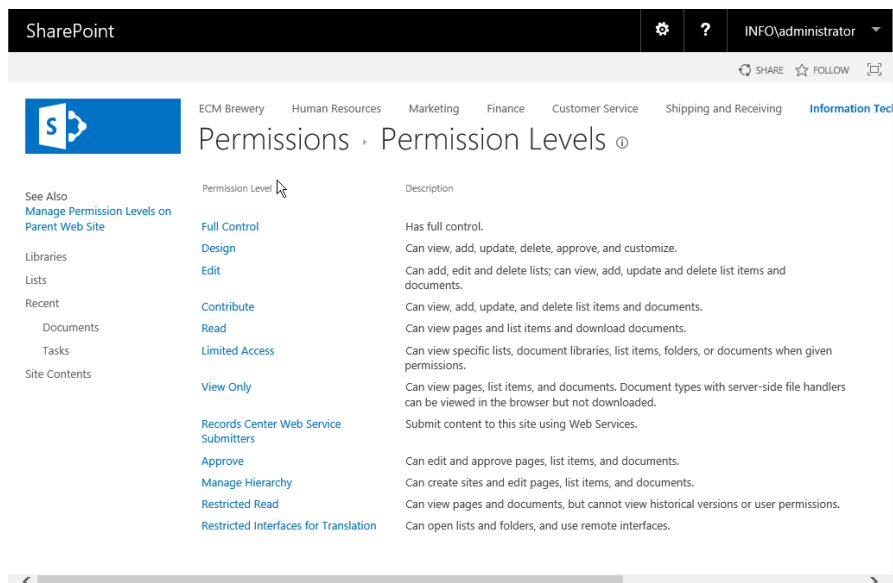
2. Click the checkbox for the group you want to add permissions to and then click Edit User Permissions bubble in the ribbon
3. On the Edit Permissions page, you can set the permissions you want to grant the group and confirm them by clicking OK.



Custom conditions can also be created for each group. These can be set according to the needs of the organization.

Part 3 Custom Permission Levels:

1. Find the site permissions page and click the Permission Levels button.
2. Click Add a Permission Level button on the permissions level page.
3. Specify a name and description for the custom permission level on the page, and select the desired permissions to include. Then click create.



Part 4 Web Application User Policies:

1. Go to the Central Administration page in SharePoint and click Manage Web Applications.
2. After step 1, select the application which you want to apply a user policy to.
3. Click the User Policy button and then in the Policy for Web Application page press the Add Users button.

Policy for Web Application

Adding or updating Web application policy with new users or groups will trigger a SharePoint Search crawl over all content covered by that policy. This can reduce search crawl freshness and increase crawl load. Consider using security groups at the policy level and add/remove users from security groups to avoid this.

|
 |

<input type="checkbox"/>	Zone	Display Name	User Name	Permissions
<input type="checkbox"/>	(All zones)	NT AUTHORITY\LOCAL SERVICE	NT AUTHORITY\LOCAL SERVICE	Full Read
<input type="checkbox"/>	(All zones)	Search Crawling Account	INFO\sp_farm	Full Read
<input type="checkbox"/>	(All zones)	Search Crawling Account	i:\0#.w\info\sp_farm	Full Read

Part 5 RMS Configuration:

1. Press the security link in the left navigation menu to navigate to the Security page.
2. After step 1, click the Configure Information Rights Management link in the Information Policy section to navigate to the Information Rights Management page.
3. On the Information Rights Management page, select the option to use the default RMS server.

Information Rights Management

IRM helps protect sensitive files from being misused or distributed without permission once they have been downloaded from this server.

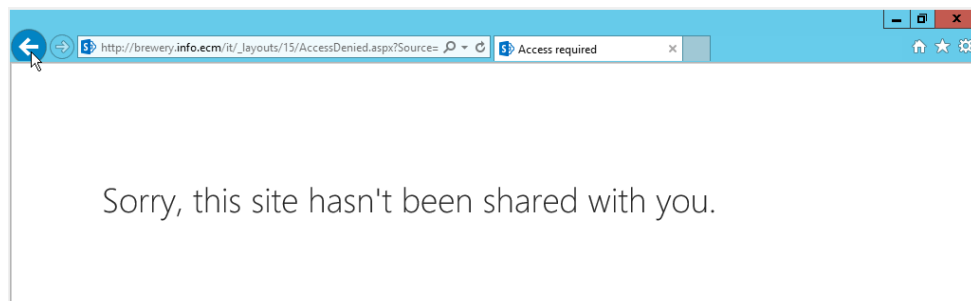
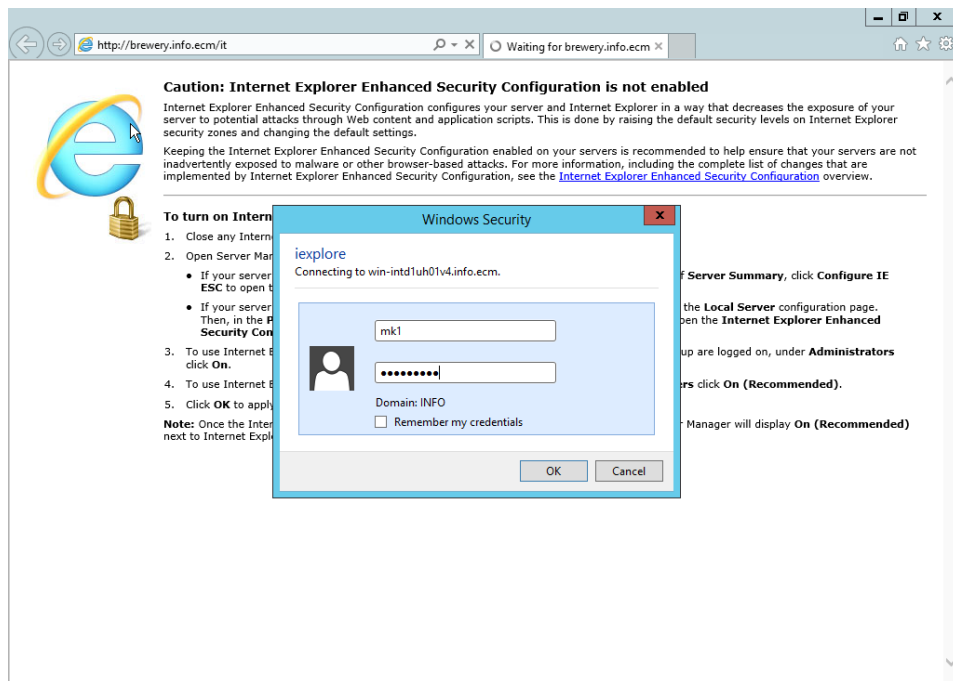
Specify the location of Windows Rights Management Services (RMS):

☒ Do not use IRM on this server
☐ Use the default RMS server specified in Active Directory
☐ Use this RMS server:

☐ Check this box in multi-tenant configurations to allow tenants to configure tenant level IRM settings.

Part 6 Demo:

After log out the administrator account, try to access the Information Technology department as a marketing account.



Create Wiki Library

Step 1: Select the site for creating a library. Click the *Gear Icon* and select *Add an app*. Click the *Wiki Page Library* and give a name to the Wiki Page library.

Step 2: Click *How to use this library links* and then click Edit under Page at the top of the page.

Step 3: Enter the title of the wiki page and enter the links using [wiki name].

Sleeman Breweries



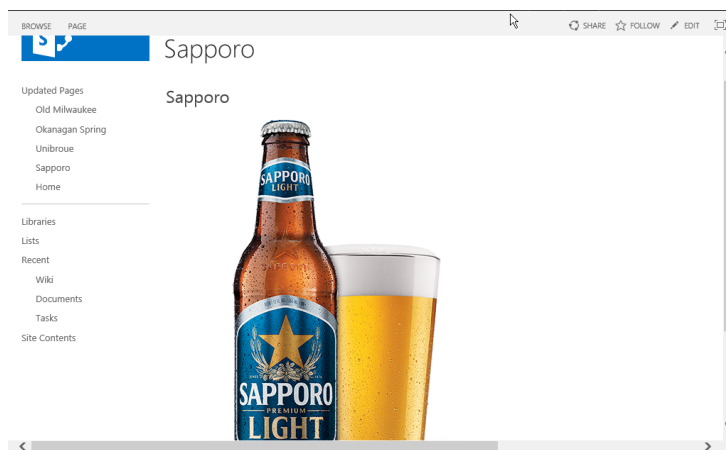
Sleeman Brewery is a company that brews and distributes their products to local stores.

[Sapporo](#)

[Unibroue](#)

[Okanagan Spring](#)

Step 4: Get into each wiki link and add some content and pictures.



Sources

Singh, I. Manager, Sleeman Brewery. (2019, July 8). Personal interview. Delta, B.C.

https://www.youtube.com/watch?v=rQCx15Z6U5I&list=PLxUdF83TgkH86hlzfVGnml8jQP4_R38_B&index=2&t=4s

https://www.youtube.com/watch?v=1VBcJ5MzdPM&list=PLxUdF83TgkH86hlzfVGnml8jQP4_R38_B&index=2

<https://www.youtube.com/watch?v=YykPToPH0Cc>

https://www.youtube.com/watch?v=yW7LT99eUMs&list=PLxUdF83TgkH86hlzfVGnml8jQP4_R38_B&index=3

https://www.youtube.com/watch?v=1D3pCXEsqss&list=PLxUdF83TgkH86hlzfVGnml8jQP4_R38_B&index=4

https://www.youtube.com/watch?v=2R1kGkfyHqM&list=PLxUdF83TgkH86hlzfVGnml8jQP4_R38_B&index=6

https://www.youtube.com/watch?v=pkbMa09LBx0&list=PLxUdF83TgkH86hlzfVGnml8jQP4_R38_B&index=7