

Understanding Information Diversity for Cloud Records Management

Presenter

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Introduction

MESSAGING ARCHITECTS

- ▶ DIVISION OF EMAZZANTI TECHNOLOGIES
- ▶ 15+ YEARS IN DATA MANAGEMENT
- ▶ DATA MIGRATION & TRANSFORMATION
- ▶ EDISCOVERY, INFORMATION GOVERNANCE

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Topics

- ▶ Unified Cloud Solutions
- ▶ Microsoft Information Governance
- ▶ Retention
- ▶ Labeling
- ▶ Designating Records

Future of Cloud Computing

- ▶ Cloud Computing is expected to process 94% of Workloads in 2021
- ▶ Cloud Computing trends show year over year growth since introduction
- ▶ Organizations looking to consolidate costs and services to integrated platforms

Leaders in Cloud Delivery



PaaS



SaaS



SaaS / PaaS

Leaders in Cloud Delivery



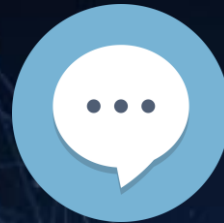
- Azure competing for PaaS Market
- Office 365 addressing SaaS
 - Providing Business Solutions
 - Information Governance
 - Communications
 - Collaboration
 - Enterprise Resource Planning
 - Security and Compliance



Email &
Calendaring
Outlook
Groups
Teams



Files &
Documents
SharePoint
OneDrive
Teams
Groups



Chat &
Instant
Messaging
Teams
Kaizala



Social Media
Yammer



Voice &
Video
Teams
Stream

Integrated Experience

The background of the slide is a dark blue network of interconnected nodes and lines, with small human icons at the nodes. A solid green vertical bar is located in the top right corner.

Managing Information

Security

Discovery

Records Management

Compliance

O365 Information Governance (MIG)

- ▶ O365 defines IG as keeping what you need and deleting what you don't need
- ▶ Manage high value content through workflows, labels and regulatory recordkeeping obligations

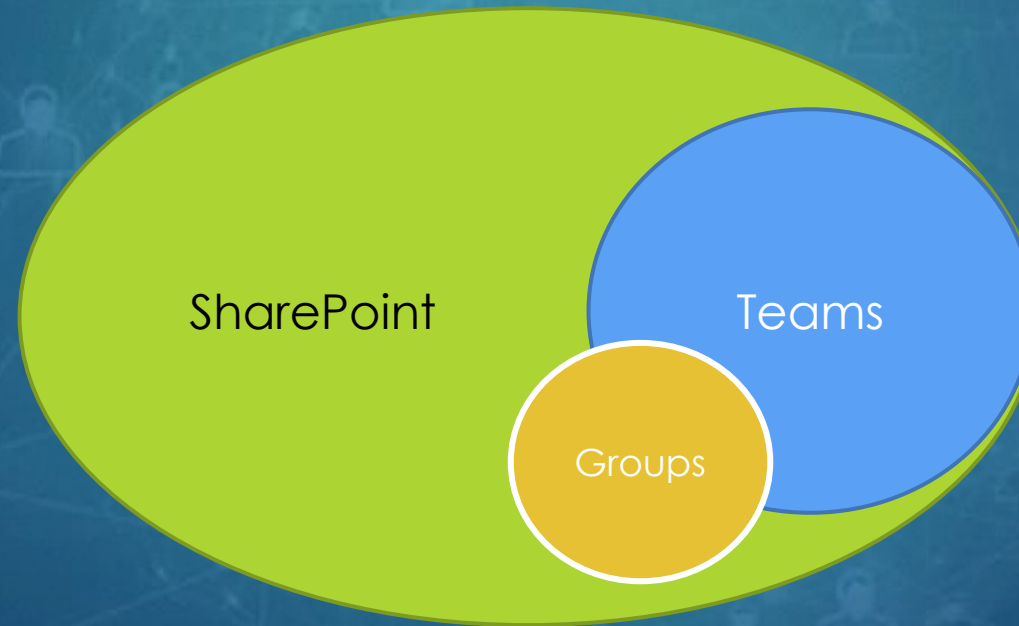


Microsoft Information Governance

▶ Document Storage is based on SharePoint Technology



Files &
Documents
SharePoint
OneDrive
Teams
Groups



- All Teams have a SharePoint Site
- All Groups have a SharePoint Site
- Team can have or not have a Group
- Team/Group Documents viewed in SharePoint but not reverse.

Microsoft Information Governance



Files &
Documents
SharePoint
OneDrive
Teams

- ▶ **No controls over where documents are stored**
- ▶ **Cross System Management**
 - ▶ **Retention Policies for SharePoint**
 - ▶ **Retention Policies through Document Labeling**
 - ▶ **Security Policies through Access and Security Labels**

Microsoft Information Governance



▶ **Folder with Retention/Security Policies**



▶ **User Applied Retention / Security Labels**



▶ **Administratively Applied Retention / Security Labels**

Microsoft Information Governance



► Retention/Security Policies

- Exchange email
- SharePoint site
- OneDrive accounts
- Microsoft 365 Groups
- Skype for Business
- Exchange public folders
- Teams channel messages
- Teams chats
- Yammer community messages
- Yammer private messages

Microsoft Information Governance



▶ Email Records Management

- User Mailboxes
- Shared User Mailboxes
- Resources
- Mail Enabled Groups / Teams

Exchange Policies

SharePoint Policies

Shared Mailboxes are mailboxes without licenses. They cannot be subject to any Retention / Legal Hold Policies or other Policies without applying a license.

Microsoft Information Governance



► Retention/Security Policies



If Document Edited or Deleted



Preservation Hold Library



If Email is Edited or Deleted

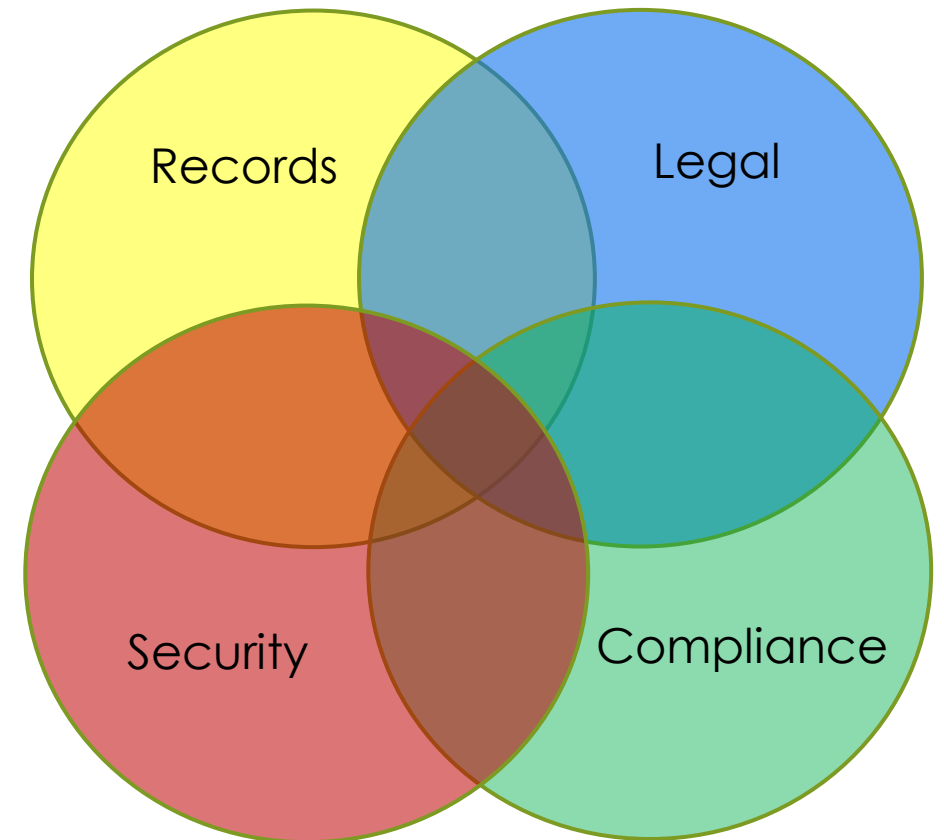


Recoverable Items Hold Folder



Questions

The Delicate Ballet



Microsoft 365 compliance

- Content search
- Communication compliance
- Data loss prevention
- Data subject requests
- eDiscovery
- Information governance
- Information protection
- Insider risk management
- Records management**

Records management

Overview **File plan** Label policies Events

Whether starting from scratch or an existing file plan, Microsoft 365 file plan uses advanced analytics and schedules throughout the content lifecycle. Our Excel template lets you quickly fill out your file plan so you can define your retention label strategy. When ready, simply upload the completed plan to Microsoft 365 then publish or activate it.

+ Create a label Import Export Refresh 9 items Search

Name	Status	Based on	Is record	Retention
Complaints		When created		10 years
Confidentiality and NDAs				
Consent		Last modified	Yes	Forever

File Plan

MICROSOFT O365 STARTS WITH FILE PLAN TO DEFINE RECORDS, EVENTS AND LABELS

Microsoft O365 Records Management

Labels

Retention

- Retain content for specified period of time
- Retain then Delete or Delete after determined time

Information Protection

- Apply Watermark, Header or Footer to document
- Encrypt, Restrict Internal & External Access

Sensitivity

- Replacement to Information Protection Labels

Unified

- Amalgamation of the IP and Sensitivity Labels for SDK

Microsoft O365 Records Management



Retention Labels

- ▶ Managing Retention for Different Retention Periods within a Library
- ▶ Define Retention based on create date or modified date
- ▶ End Users can apply a label to a document
- ▶ Only one label can be applied to each document
- ▶ Labels cannot replace existing labels except for default labels

Microsoft O365 Records Management

Retention wins over Deletion

Longest Retention is Observed

Explicit before Implicit

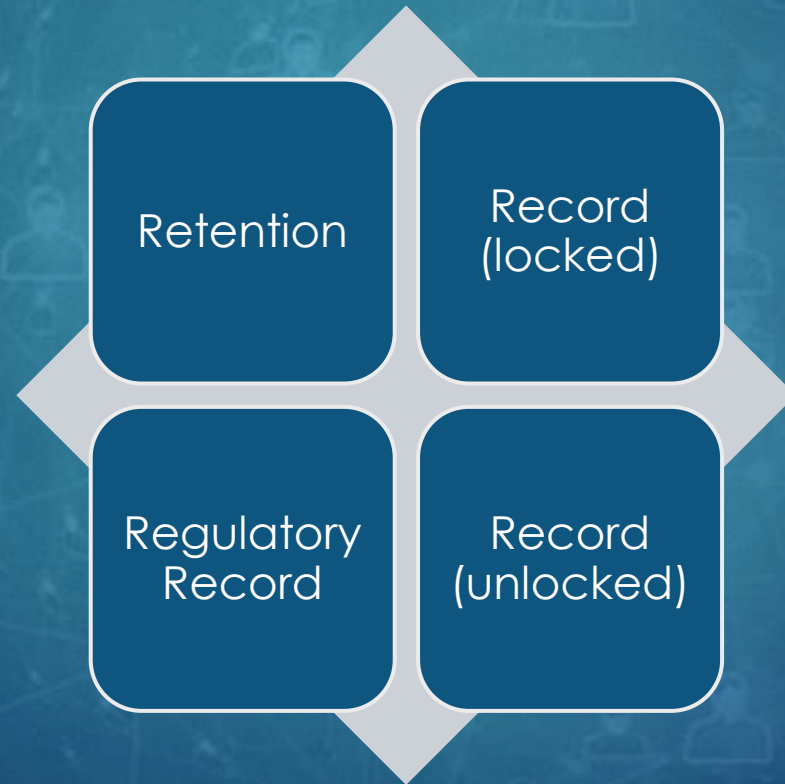
Microsoft O365 Records Management



- ▶ **Automatic Labeling**
- ▶ **Based on Sensitive Content (Templates)**
- ▶ **Based on Keywords and Queries**
- ▶ **Using Trainable Classifiers**

Microsoft O365 Records Management

- ▶ Label content as a “Record” with retention labels



Action	Retention label	Record - locked	Record - unlocked	Regulatory record
Edit contents	Allowed	Blocked	Allowed	Blocked
Edit properties, including rename	Allowed	Allowed	Allowed	Blocked
Delete	Allowed ¹	Blocked	Blocked	Blocked
Copy	Allowed	Allowed	Allowed	Allowed
Move within container ²	Allowed	Allowed	Allowed	Allowed
Move across containers ²	Allowed	Allowed if never unlocked	Blocked	Blocked
Open/Read	Allowed	Allowed	Allowed	Allowed
Change label	Allowed	Allowed - container admin only	Allowed - container admin only	Blocked
Remove label	Allowed	Allowed - container admin only	Allowed - container admin only	Blocked

Record Permissions

Regulatory Record

- ▶ Regulatory Record Types
 - ▶ Administrators cannot change label after applied
 - ▶ Retention periods cannot be adjusted downward after being set
 - ▶ Auto-labeling not supported and must be set by retention label policies

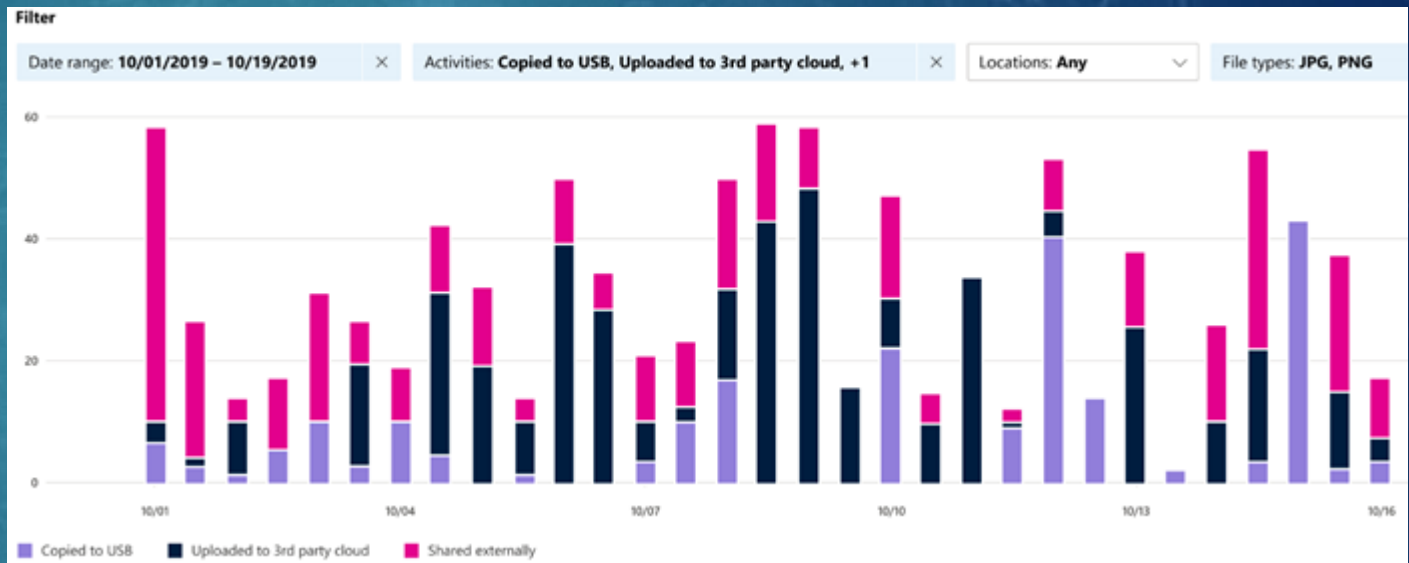
External Records

▶ Data Connectors to third party data

- ▶ Android
- ▶ AT&T Network
- ▶ Bell Network
- ▶ Bloomberg Messages
- ▶ CellTrust
- ▶ Cisco Jabber
- ▶ EML
- ▶ Facebook
- ▶ FX Connector
- ▶ Human Resources
- ▶ ICE Chat
- ▶ Instant Bloomberg
- ▶ Jive
- ▶ LinkedIn
- ▶ MS SQL
- ▶ O2 Network
- ▶ Physical Badging
- ▶ Pivot
- ▶ Redtail
- ▶ Reuters
- ▶ Salesforce
- ▶ ServiceNow
- ▶ Slack
- ▶ Symphony
- ▶ TELUS
- ▶ Text Delimited
- ▶ Twitter
- ▶ Verizon
- ▶ Webex
- ▶ WhatsApp
- ▶ Zoom

Microsoft O365 Records Management

- ▶ **O365 Compliance Center**
- ▶ **Manage and Report on Label Activity**
- ▶ **Use trainable classifiers or custom classifiers to label content**
- ▶ **Import retention plans**
- ▶ **Generate deletion & disposal records**



<https://www.microsoft.com/en-us/videooplayer/embed/RE4vx8x>

O365 Records Management Summary

Pro

- Built into the Microsoft Bundle
- Can define sensitive content
- Can define retention by site or document
- Can be applied manually or automatically
- Can trigger automated workflows

Cons

- Only allows single retention labels
- Label application can take up to 7 days
- Higher level licensing required for administration
- Can become complex to deploy & manage
- Generally requires E5/G5 and Above Licensing



Questions