



Set Your Records Straight in Office 365

A Modern Approach to a Records Management
Staple *(virtual whiteboard session)*

 15 September 2020  11:00 – 12:00 BST

In Partnership With:



DATA PROTECTION
FORUM



Reserve Your Spot



Introductions



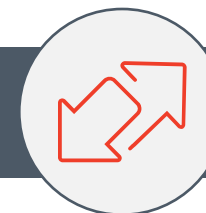
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Director IM Strategy

- Really likes records & information management
- Worked as an RM in the public service for many years
- Has been AvePoint's resident RM person for 6 years





Migrate. Manage. Protect.



12 Global Cloud Instances

99.5% Availability Backed by Azure

24/7 World-Class Support

20PB+ Managed Customer Data

ISO Certification



27001:2013

16K
Customers

6M
Cloud Users

88
Countries

7
Continents

AvePoint® is headquartered and maintains its principal operational center in Jersey City, NJ, with approximately 1,500 employees across five continents.

Microsoft
Partner

2017 Partner of the Year Winner
Public Sector: Microsoft CityNext Award

2016 Partner of the Year Winner
Technology for Good Citizenship Award

2015 Partner of the Year Winner
Collaboration and Content

2014 Partner of the Year Winner
Public Sector: Public Safety and National Security

Discussion Topics

- Managing records in M365
- Retention & Disposal
- Classification & Taxonomy
- Information Architecture
- When to fight and when to fold (or only fight a little bit)



Records Management in M365



Records Managers



M365





Managing records in M365 requires a fundamental shift in the way we have traditionally managed records.



The essentials are the same

Retention & Disposal Rules

(what is the outcome for our information?)

Business Classification Scheme

(used to tag the rules to the content)

Information Architecture

(the structure where the content lives)



What can I do to modernise?

Let's head to
the whiteboard!



What's worth fighting for?

The 'Lulu Rule'

Lulu. 4 Years old.
Already has her
own rule.

Pick. Your. Battles.



What's your 'seatbelt'?



- What are the things you can't compromise on?
- Record integrity
 - Auditing & Reporting
 - Defensible Destruction



What's your 'dinner'?

What will you compromise on - to a point?

- Metadata
- Migration
- Physical records



What's your 'clothes'?



It's just not worth arguing about?

- Depth of folders
- Useless metadata
- Naming conventions



'All you need to know' course list

Information Governance Courses

- Caldicott Guardian
- Caldicott Guardian Deep Dive
- Freedom of Information
- Information Governance
- Senior Information Risk Owner

Records Management Courses

- Records Management
- Records Management Deep Dive
- Information Asset Management
- Microsoft 365 & SharePoint Records Management

DPA & GDPR Courses

- Data Protection Officer
- Certificate in Managing Data Protection Compliance
- Data Protection & General Data Protection Regulation (GDPR)
- Subject Access Request
- Redaction and Scrutiny

Others Courses

- Cyber Security
- Data Ethics

Compliant RM in
M365 IS
possible...but it
does require a
shift in how you
do things

Evaluating M365
retention labels -
things you need to
consider!

In House Training Packages

PLATINUM - GOLD - SILVER - BRONZE

These packages are cost effective and designed to suit your training requirements.

Our Bronze package is a virtual training environment which is increasingly popular with our clients as it helps you to reduce your carbon footprint.



Questions?

