



# 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



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# Introductions



Alyssa Blackburn  
*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



16K Customers

6M Cloud Users

88 Countries

7 Continents

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Public Sector: Microsoft CityNext Award

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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

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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?

