AvePoint

BRAVO CONSULTING GROUP

Getting Sunshine Ready in the Cloud

Powered by AvePoint. Delivered by Bravo.

Microsoft Partner

Microsoft

Gold Application Development
Gold Collaboration and Content
Gold Cloud Productivity
Gold Messaging
Gold Datacenter

Collaborate with Confidence

Accessible content is available upon request.

Antoine Snow

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AvePoint® Public Sector

FedRAMP

12	99.5%	24/7	50PB+
Global Cloud Instances	Availability Backed by Azure	World-Class Support	Managed Customer Data

Microsoft Partner

Microsoft

5x Partner of the Year Award Winner

AVPT

NASDAQ

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Eric Schrier

Executive Director of Operations

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Leesburg, VA

About Bravo

Bravo Consulting Group, LLC simplifies the way our customers *create, share, and secure* their intelligent information.

We are passionately focused on customer satisfaction and delivering solutions that achieve organizational objectives and mission success.

- **14+** Years of Experience
- **12+** Years AvePoint Preferred Partner
- **12+** Years Microsoft Certified

Microsoft Gold Partner

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Agenda

What is the ‘Sunshine Law’?

Information Governance

The Problem

The Solution

Recap

Sunshine Law

What is the Sunshine Law?

Shining light on how our Government works…

'Sunshine Laws' significantly extend the "right of access" to most records generated by government entities, and in some cases extend to proceedings of public boards or commissions at the state and local levels.

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Why Should You Care?

However, *Florida is the most expansive.*

Penalties can include:

- $ **Fines**
- ✕ **Suspension or removal**
- **Criminal and non-criminal infractions**

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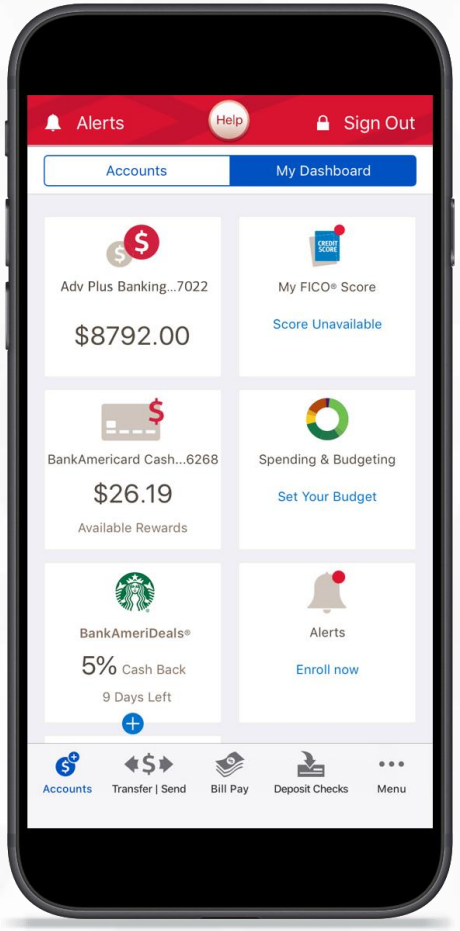
Information Governance

Blame It on the Clouds…



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Intro to M365

Microsoft 365

Connected Experiences

- Collaborate in a central hub for chat, meetings, calling, and content with Microsoft Teams
- Stay productive from anywhere with Office mobile apps
- Streamline IT with Windows and end-point management

Integrated Workflow

- Integrate line of business apps into Microsoft Teams
- Automate processes with Forms and Power Automate
- Manage work across individuals, teams, and organizations with To-Do, Planner, and Project

Intelligent Security

- Defend your digital landscape with Microsoft Threat Protection and Cloud App Security
- Assess your compliance posture and reduce risk with capabilities built into Compliance Manager
- Safeguard your data with Information Protection

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Changing Landscape of RM

Physical Records

eDRMS

Enterprise Content

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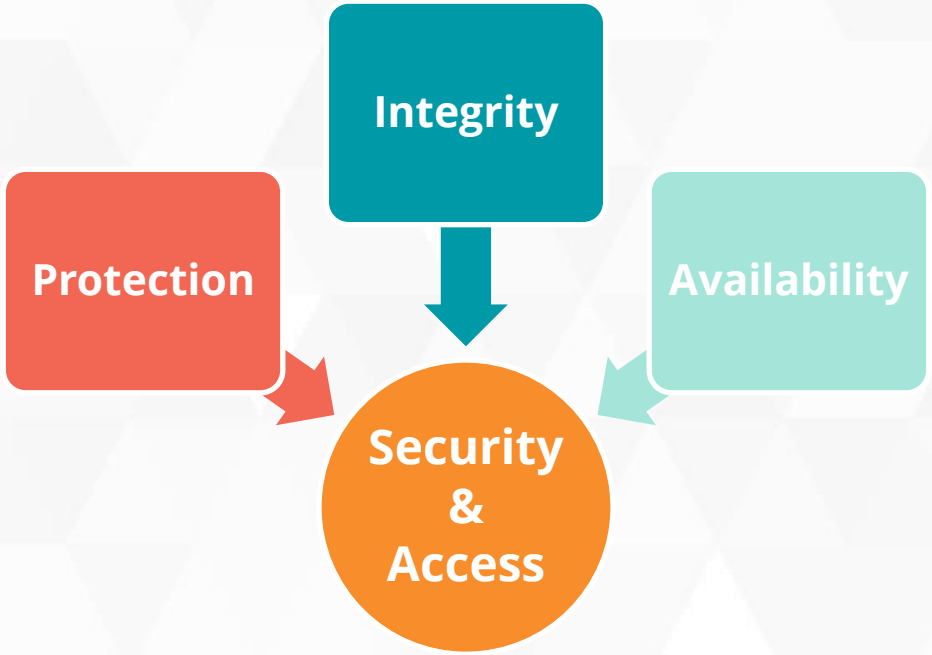
Security and Access

Protection: This is the protection of information from unauthorized deletion and the ability to maintain confidentiality when necessary, depending on the data.

Integrity: This is the ability to prove all interactions on records, particularly for evidential value where this is required.

Availability: This is the ability to ensure that records are available, accessible and retrievable by those who should have access.



Security of and access to content is an important component in holistic information management. Information should be classified and protected according to its purpose.

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What People Need

- Supports other tools you use
- Mobile/desktop/cloud friendly
- Easy to report & view
- Gives adequate control to admins/legal
- Transparent & easy to use

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The Problem

Government agencies have a need to

Manage Information & Ensure Compliance

in a modern workplace.

Before Scenarios

1. No current way of managing records in the cloud
2. Need to adhere to regulatory requirements and changing regulations
3. No centralized repository for records and reporting
4. Retention and Disposal requirements are not being properly met
5. User-centric classification model

Manage Information and Ensure Compliance

- Managing of Records from the point of capture/creation
- On-demand reporting and auditing for Managed Records, Activity and Disposition
- Automated classification of records to reduce burden on end users
- Intuitive search capabilities to improve productivity and make content easily findable
- Management of physical records & records on file systems

Modern Workplace

Records & Information Management

- Records Classification
- Records Management
- Records Retention

Establish good practices for records classification, management, and lifecycle to ensure high-quality content for your users while meeting your regulatory and ERM requirements.

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The Solution

Records Management Compliance

"Office365 takes a modern approach…and a focus on in-place records management. However…it provides no pathway from legacy records management service and may not meet their regulatory needs."

"Deploy third-party records management solutions if the organization demands graphical file plan management or must adhere to strict regulatory compliance and published standards".

Gartner: Microsoft Office 365 Grows Records Management Maturity, but Falls Short for Regulated Industries

Core features or components of a records management solution

How We Do It

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Manage information and ensure compliance

How we do it BETTER:

Automated

- ✓ Automated classification of items without users having to lift a finger
- ✓ If needed, utilize Microsoft' native SharePoint Syntex capability to automatically classify content based on machine learning algorithms

Comprehensive Platform

- ✓ Records management of records in SharePoint Online, Groups, Teams, OneDrive and E-mail in Exchange Online – all included within a single per user license and with standard Microsoft enterprise licensing.
- ✓ Additional support for on-premises solutions (i.e., SharePoint and File Systems) from the cloud with AvePoint's Cloud Agent
- ✓ Other AvePoint products such as AvePoint Office Connect and AvePoint Report Center included to help meet your requirements and simplify the user experience.
- ✓ Only SaaS Records Management solution on the market to meet local records management standards

Scalable

- ✓ Scalable to meet organizations of all shapes and sizes
- ✓ Provide the capability to maintain Office 365 audit data beyond standard Microsoft SLAs to ensure you can report on data and permissions history.

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Implementation Methodology

Maintain

Managing M365 Content and ensuring retention, Records-Control, Transparency and ease-of-use / collaboration-ability

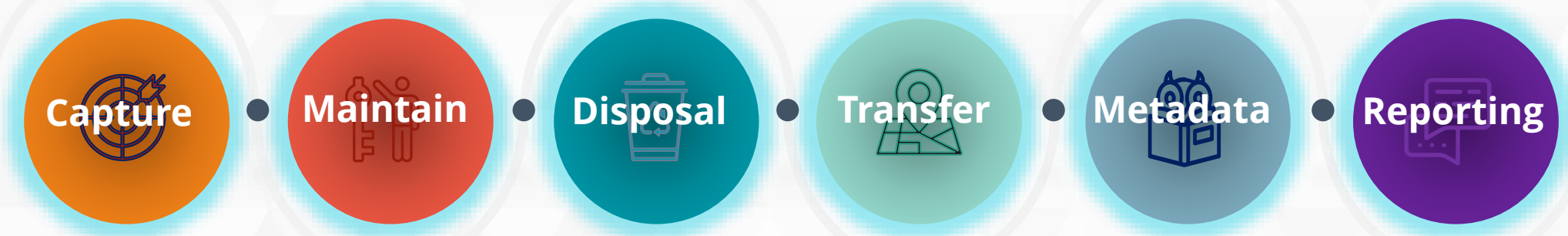
Transfer

Complete transfer of Records (per file schedule) to the National Archives – automated if possible

Reporting

Reporting to target:

1) Real-time management to ensure records capture
2) Records Disposition Transparency



36 CFR 1236.20 **36 CFR 1222.26** **36 CFR 1226.24** **36 CFR 1235.10** **NARA 2015-04** **36 CFR 1220.10**

Capture

Capturing Content from multiple sources and ensuring they all fall into Record management cope on M365

Disposal

Ensuring full Disposal and Destruction guidelines are met as per NIST 800-88 and related guidelines

Metadata

Metadata Tagging to capture: who, what, where, when, and why, and ensure that Administrative, technical, historical and descriptive information are captured

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Project Phase Overview

3.1 Analyze existing records management environment

Phase 01
Analysis and Planning

- Analysis of all aspects of Business Rules, File Plan, Records Cycle and Discovery Documentation
- Development of the Detail Design Document & Project Management Plan

3.2 ERM System Implementation

Phase 02
Implementation

- Identification of all content locations, and clean-up of duplicate/redundant records, content etc.
- Confirmation of all of the above with stakeholders and approval to begin configuration
- AvePoint and Technology Implementation
- Initial Records configuration of the Business Rules Per the NARA UERM lifecycle
- Add tagging, metadata, taxonomy and configure search & eDiscovery
- Administrative validation of rulesets and reporting
- Impose Governance, controls, management, document configuration

Phase 03
Refinement & Testing

- With the principal of "no-one wants to be a records manager" –
  - iteratively test and work with key stakeholders to improve ease of use and redefine reporting etc. to meet business needs
- Enhance the end user experience making sure they are easily and efficiently able to create, distribute, use and manage their information.

3.3/3.4 Technical and End-User Training

Phase 04
Training, Adoption & Closing

- Finalize & Transfer System, Configuration, Management & Design Documentation & Ownership
- Training Development occurs throughout the program. Training Roll-out just prior to and following Go-Live including:
  - Technical Training Documentation, End-User Training Documentation & Hands-On Training sessions for Technical, administrative, records and regular personnel

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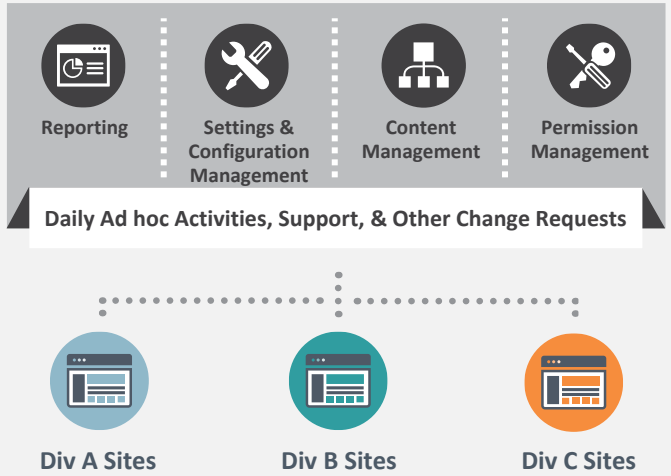
Let’s Show You

Delegating Records Administration

CENTRALIZED AGENCY TENANT

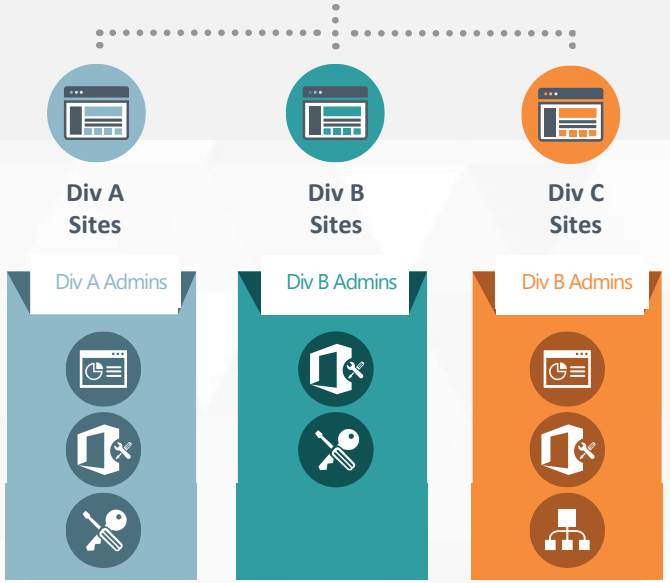


CONCERNS

- Large number of Office 365 Admins creates a security risk
- Divisional admins missing the ability to manage and audit their own disposition
- Global admins cannot scale to meet all admin needs of divisional sites

AvePoint Records

SCOPED DELEGATED ADMIN



BENEFITS

- Divisions manage their own File Plans
- Auditable activities
- Disposition approval workflows
- Reduce visibility between agencies

Recap

TAKEAWAYS

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Thank You

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