M365 Spring Cleaning: Disposing Zombie Teams

Let’s talk Teams lifecycle management

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25% Fortune 500

7M Cloud Users

88 Countries

7 Continents

Microsoft Partner

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Let’s connect!

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The Current Scenario

COVID caused a rush to the cloud during quarantine

Positives

- "Work from anywhere" is the new normal
- No more VPN for file sharing
- Attachments aren't buried in email
- Many new features to take advantage of

Negatives

- Little to no planning was completed
- "Lift and Shift" was common
- Things are everywhere! Or maybe they aren't and they should be ;-)
- A lot of abandoned Teams that were spun up quickly but no longer in use

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Taking a Step Back

If you could it all over again….what would you change?

How is modern collaboration in M365 different?

Legacy Approaches

- Long term, structured repositories
- Hierarchical and long-term
- Defined permission structures
- Limited broken inheritence
- Limited privileges to create and provide access

Modern M365 Collab

- Mix of long and short-term workspaces
- Non-hierarchical by nature
- Multiple services overlapping
- Highly privileged owners *and members*
- Broken inheritance everywhere
- Self-service

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What is driving the shift to ad-hoc spaces?

Container-based management

- Group by function, not by department
- Ability to manage security and sharing with less broken inheritance
- Create policies for governance & retention by container instead of by file type
- If we don't need it anymore, delete it!

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Teams that have lost relevance

Common Scenarios

- Teams with the word "test" in them
- Teams that haven't been used in more than 90 days
- Project-based Teams
- Customer-based Teams (if they are no longer a customer!)

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Not it!!

Who should decide what can be deleted?

- **Legal and Compliance Teams** for more formal documentation and company records
- **Management** for ad-hoc teams (the Company Picnic Organization Team doesn't need legal's approval!)
- **PMO:** Project-based Teams
- **Account Management Team:** Customer-based Teams (if they are no longer a customer!)

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The Exceptions

What if the team is no longer active, but content within it is subject to a longer retention? How should we approach this problem? Does it mean the Team has to live for as long as the content?

Example: Tax department – tax returns and their work papers are "active for 1 to 3 years" but returns needs to be kept forever

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Signs you may need to reorganize before implementing governance

You're asking questions like…

- I have a LOT of those exceptions you talked about, how could we possibly create a policy?
- I have documents that people need access to, but I don't want them to have access to the entire Team – what should I do?
- We only have one Team per department and they are reluctant to delete anything, how do we confidently separate the content that should be retained vs deleted?

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So…What's Next?

Implementing governance

- Take the time to do the planning – content and organization is key!
- Use a migration tool to move content around
- Governance can be addressed before or after you initially deploy Teams
  - Governance is an ongoing activity

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Planning Round 1

- Content:
  - What goes into OneDrive vs SharePoint vs Teams
  - How do we split our content out across Teams – may be department driven
- Security:
  - Who needs access to that content?
  - Do we allow Guest Access?
- Governance:
  - Just create teams as requested
  - No archiving or Teams deletion
- Apps and tools
  - No third-party integrations
- Theme
  - Keep it locked down to control sprawl

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Assessment: Re-organize, flatten your architecture, identify inactive Teams

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Planning Round 2

- Content
  - Migrate sensitive data like HR, R&D
- Governance & Security
  - What additional layers of protection are needed?
    - Prevent print
    - Prevent external sharing
- Retention
  - Archiving unused Teams
  - Archive vs Delete
- Apps and Tools
  - Third-party integrations for critical business systems
  - Allow access to approved third-party apps
- Theme
  - Continue to scale the environment and take advantage of more 365 features, without compromising security needs

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Microsoft native tooling to help govern workspace lifecycle…

Team “Archiving”

- Removes Team from user’s lists of active Teams
- Puts Team conversations and files into “read only”
- Can be reversed by a Team owner

Soft Delete

- Recover deleted Teams and Groups

Group Expiration

- Require owners to confirm their Group is still active and relevant periodically

Retention and expiration of content

- Records management and content compliance policies

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Understanding “archived” Teams

Using Retention Policies for Teams

Office 365 | Security & Compliance

Classifications
Data loss preventi
Data governance
Dashboard
Import
Archive
Retention
Events
Supervision
Threat manageme
Mail flow
Data privacy

Create a policy to retain what you want and get rid of what you don't.

- Name your policy
- Settings
- Choose locations
- Review your settings

Decide if you want to retain content, delete it, or both

Do you want to retain content?

Yes, I want to retain it

For this long... | 7 | years

Retain the content based on | when it was cr

Do you want us to delete it after this time?

Yes | No

No, just delete content that's older than

1 | years

Need more options?

Use advanced retention settings

Back | Next

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Create a policy to retain what you want and get rid of what you don't.

- Name your policy
- Settings
- Choose locations
- Review your settings

Choose locations

Office 365 groups			
Skype for Business			
Exchange public folders			
Teams channel messages	All Choose teams	None Exclude teams	
Teams chats	All Choose users	None Exclude users	

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Feedback

Understanding O365 “Retention Labels”

A “layered approach” for M365 governance…

IT Governance

(Broad, organization-wide)

Operational Governance

(Application-specific, aligns with IT Governance goals)

- **Workspace Provisioning**
- **Ongoing Management & Enforcement**
- **Lifecycle and EOL for Workspaces**

Data Governance

(Content-specific, aligns with IT Governance goals)

- **Item-level Retention & Expiration**
- **Records Mgmt**
- **Classification**
- **DLP**

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Top-down, and bottom-up…

"Container level"

"Content level"

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(Application-specific, aligns with IT Governance goals)

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- Lifecycle and EOL for Workspaces

Data Governance
(Content-specific, aligns with IT Governance goals)

- Item-level Retention & Expiration
- Records Mgmt
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- DLP

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Implementing Governance at the M365 Container Level

What is sprawl?

Not a number…

… just more than you can effectively manage

Best practices for managing M365's new model

- Establishing data ownership
- Workspace level classification
- Collaboration asset inventory
- Attestation/Recertification
- Automated self-service requests
- End-to-end lifecycle management

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Admins have an “inventory” of all M365 collaborative workspaces

AvePoint Cloud Governance

Search in Workspace report

Export report | Mail all contacts | Refresh | 0 workspaces selected

- Home
- Management
  - Services
  - Profiles
  - Service templates
- Settings
  - MyHub settings
  - System settings
- Directory
  - Workspace report
  - Guest user report
- Job monitor

Workspace report

All M365 workspace types

Data owners

Compliance status

Renewal pending

Phase	Name	Status	Type	URL	Policy	Primary admin	Primary Data Ow...	Secondary contact	Classification	Critical Busines
	R&D Team Site	Deleted	Site Collection	https://avepointatsd...	SC Intranet Policy	Barriemore Barlow	Ian Anderson	Ray Hill	-	-
	Quarterly Conference	Archived	Microsoft Team	https://avepointatsd...	Internal Group Team...	Barriemore Barlow	Barriemore Barlow	Ian Anderson	-	No
	Q2 Outing	Active	Microsoft Team	https://avepointatsd...	Guest Group Team P...	Barriemore Barlow; R...	Ray Hill	Ian Anderson	-	No
	publictoprivate	Active	Microsoft Team	https://avepointatsd...	-	Barriemore Barlow	-	-	-	-
	Public-Team_ElPaso	Deleted	Microsoft Team	https://avepointatsd...	Private Team Policy	Ray Hill; Ian Anderson	Ray Hill	Ian Anderson	-	-
	Public-ShoeDeal	Deleted	Microsoft Team	https://avepointatsd...	Private Team Policy	Ray Hill	Ray Hill	Ian Anderson	-	-
	Public-SalesWestVAT	Deleted	Microsoft Team	https://avepointatsd...	Private Team Policy	Ray Hill	Barriemore Barlow	Ray Hill	-	-
	PublicProductXYZ	Deleted	Microsoft Team	https://avepointatsd...	Public Short Term Te...	Ray Hill	Ray Hill	Ian Anderson	-	-
	Public-PDT	Deleted	Microsoft 365 Group	https://avepointatsd...	Private Team Policy	Ian Anderson	Ian Anderson	Ray Hill	-	No
	Public-New Marketing	Deleted	Microsoft Team	https://avepointatsd...	Public Short Term Te...	Ian Anderson	-	Ray Hill	-	-
	PublicMarketingEvents	Deleted	Microsoft Team	https://avepointatsd...	Public Short Term Te...	Ray Hill	Ray Hill	Ian Anderson	-	-
	Public-internal_project	Deleted	Microsoft 365 Group	https://avepointatsd...	Private Team Policy	Ray Hill	Barriemore Barlow	Ian Anderson	-	No
	Public-internal_Project	Deleted	Microsoft Team	https://avepointatsd...	Private Team Policy	Ray Hill	Ray Hill	Ian Anderson	-	-
	Public-Internal HR Proj	Deleted	Microsoft Team	https://avepointatsd...	Public Team Policy	Ray Hill	Ray Hill	Ian Anderson	-	-
	PublicHRUpdates	Deleted	Microsoft Team	https://avepointatsd...	Public Team Policy	Ray Hill	Ray Hill	Ian Anderson	-	-
	PublicHRCommunicati	Deleted	Microsoft Team	https://avepointatsd...	Public Team Policy	Ray Hill	Ray Hill	Ian Anderson	-	-
	PublicGroupe-Example	Deleted	Microsoft 365 Group	https://avepointatsd...	Public Team Policy	Barriemore Barlow	$requester	$managerofrequester	-	-

Admins can drill-down for all details of each workspace

Admins can drill-down for all details of each workspace

How do you keep this information current over time?

Periodic review and recertification by data owners confirms need, permissions, etc.

Periodic review and recertification by data owners confirms need, permissions, etc.

What if the workspace is no longer needed?

AvePoint managed de-provisioning of O365 Workspaces

Adding “teeth” to the Teams archiving concept…

Renewal Profile Management > Renewal profile for "APAC Conf Team"

Save Cancel

Duration and Escalation

Add user roles or groups (Microsoft 365 Groups, security groups, distribution groups, or mail-enabled security groups) to complete the renewal task. Select the renewal process option from the Order drop-down list:

- One at a time (serial) - The renewal task assignees must complete the task one after another. If an assignee does not complete the renewal task in the specified duration, the task will be assigned to the next assignee according to the specified order of assignees.
- All at once (parallel) - The renewal task will be assigned to all task assignees at the same time. All renewal task assignees can complete the renewal task within the duration anytime. Once a task assignee completes the task, the current renewal process is over.

Select an e-mail template to notify the assignee of the renewal task and specify a duration for each renewal process. You can also enable automated team archiving. If the renewal process of a team is not completed within the specified period of time, the renewal task will be overdue and the team will be automatically archived. When the team is archived, the team membership and team site permissions will be changed according to the team archiving profile applied to the team's policy. The task assignees can still complete the overdue renewal task. When the task is completed, the archived team will be automatically restored.

*Renewal task assignee:

$Primary group contact

$Secondary group contact

+ Add User Role

+ Add Group

*Order:

One at a time (serial)

*Duration for each renewal p

14 Day(s)

Allow renewal task assi other users

*Notification e-mail template renewal task:

Built-in Office 365 Group Ren

Enable automated team

*Archive the team if th completed after 30

Enable reminder bef

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Microsoft Teams Archiving Profile Management > Teams Archive - Demote All Users

Save Cancel

Team Membership and Team Site Permissions

Choose how to manage team membership and team site permissions when Microsoft Teams are archived.

If you want to change team owners, you must specify at least one user to take over the team owner role. If none of the specified users can be found in the Microsoft 365 tenant, the account that is used to create the Azure AD app profile, the account in the service account pool, or the service account will become the team owner.

Note the following team restore results if you want to change team site permissions:

- Make the site read-only for team members - When an archived team is restored, team members' permissions will be restored.
- Make the site read-only for all users except the team owners - When an archived team is restored, users' permissions to the team site will not be restored.
- Remove all site permissions from users except the team owners - When an archived team is restored, users' permissions to the team site will not be restored.
- Lock the team site - When an archived team is restored, the team site will be unlocked.

☑ Remove all team members

☑ Change team owners

○ Remove all team owners

◉ Demote all team owners to team members

*Assign the team owner role to the specified users while archiving the team

ATSAdmin ×

☑ Change team site permissions

○ Make the site read-only for team members

○ Make the site read-only for all users except the team owners

○ Remove all site permissions from users except the team owners

◉ Lock the team site

◉ Lock the site in "no access" status

○ Lock the site in "read-only" status

Lifecycle timeline, archiving or deleting based on time, inactivity…

Adaptive scopes for retention policies leverage Cloud Governance metadata

Contoso Electronics | Microsoft 365 compliance

Information governance > Create retention policy

- Name
- **Scope**
- Retention settings
- Finish

Define the scope of this poli

Policy scope can be adaptive or static. An adaptive policy wi
specified Active Directory attributes and will automatically a
attributes. A static policy is applied to a fixed set of location
change.

Adaptive scope
After selecting adaptive scopes, which consist of Active Directory
sites in your organization, you'll choose supported locations con
automatically update to match the criteria defined in the adaptiv

Static scope
You'll choose locations containing the content you want to retai
example if a SharePoint site is added or removed), you'll need to

Back | Next

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Information governance > Create new adaptive scope

- Name your scope
- **Define conditions/locations**
- Review

What do you want this scope to include?

Each type of scope uses different Active Directory attributes to match the users, groups or sites you want this policy to apply to.

User
Attributes used to define users include First name, Last name, Department, Country or Region and more.

Site
Attributes used to define SharePoint sites include Name, URL and SPWeb.

Group
Attributes used to define groups include Name, Description, Email address and Aliases.

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Moving granular content to longer term repositories…

AvePoint Cloud Records

Home > Rule Management > Create

* Define a rule

- ○ Copy from an existing rule
- ◉ Create a new rule

Name:

Move record to long term repository

Description:

Move a record to a long term repo before deleting a Team

* Define an object level

Document/E-mail

Define a disposal class

Disposal Class:

E421-EO5

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* Select a content source and define rule criteria

SharePoint Online | Exchange Online | File System

* Define rule criteria

Manage the content when All of these criteria are met. + Add

- Column (Text) Record series Equals Project SOW
- Column (Yes/No) Project Comple Equals Yes
- Column (Yes/No) Is Executed Equals Yes

What would you like to do with the content?

- ○ Remove content and destroy
- ○ Record Declaration and Tagging
- ◉ Move documents to a new destination library

Specify a destination:

- ◉ Enter a destination

https://somesite.SPO.com/Sites/ClientServicesRecords | Validation Test

- ○ Select a destination from the tree

If an object with the same name already exists, then:

- ○ Skip and keep the destination object
- ◉ Overwrite the destination object
- ○ Add a suffix to the object when moved to the destination
- ☐ Declare each document as a SharePoint record when it is moved

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SharePoint Online | Exchange Online | File System

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thank you

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Cám ơn	شكريه	Terima Kasih	Dank u Wel	Děkuji
நன்றி	Köszönöm	ありがとうございます	ขอบคุณครับ	Dziękuję
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