



# Information Management and Governance for Office 365 Workspace Lifecycle Control

Timothy Boettcher and Jay Leask

Microsoft  
Partner



Gold Application Development  
Gold Cloud Platform  
Gold Cloud Productivity  
Gold Collaboration and Content

Accessible content is available upon request.

# AvePoint Information Governance Leads



Timothy Boettcher

SVP Client Services

With a Masters in Business Information Systems and over 15 years experience in IT and consulting (with 10+ years specialized in SharePoint information management and intranets), Tim is strongly skilled in understanding the business values in O365, SharePoint, and Teams. He uses this blend of business and technology to drive successful digital transformation and information management projects for clients.

 [@timothyb\\_AU](https://twitter.com/@timothyb_AU)



Jay Leask

Principal Solution Engineer

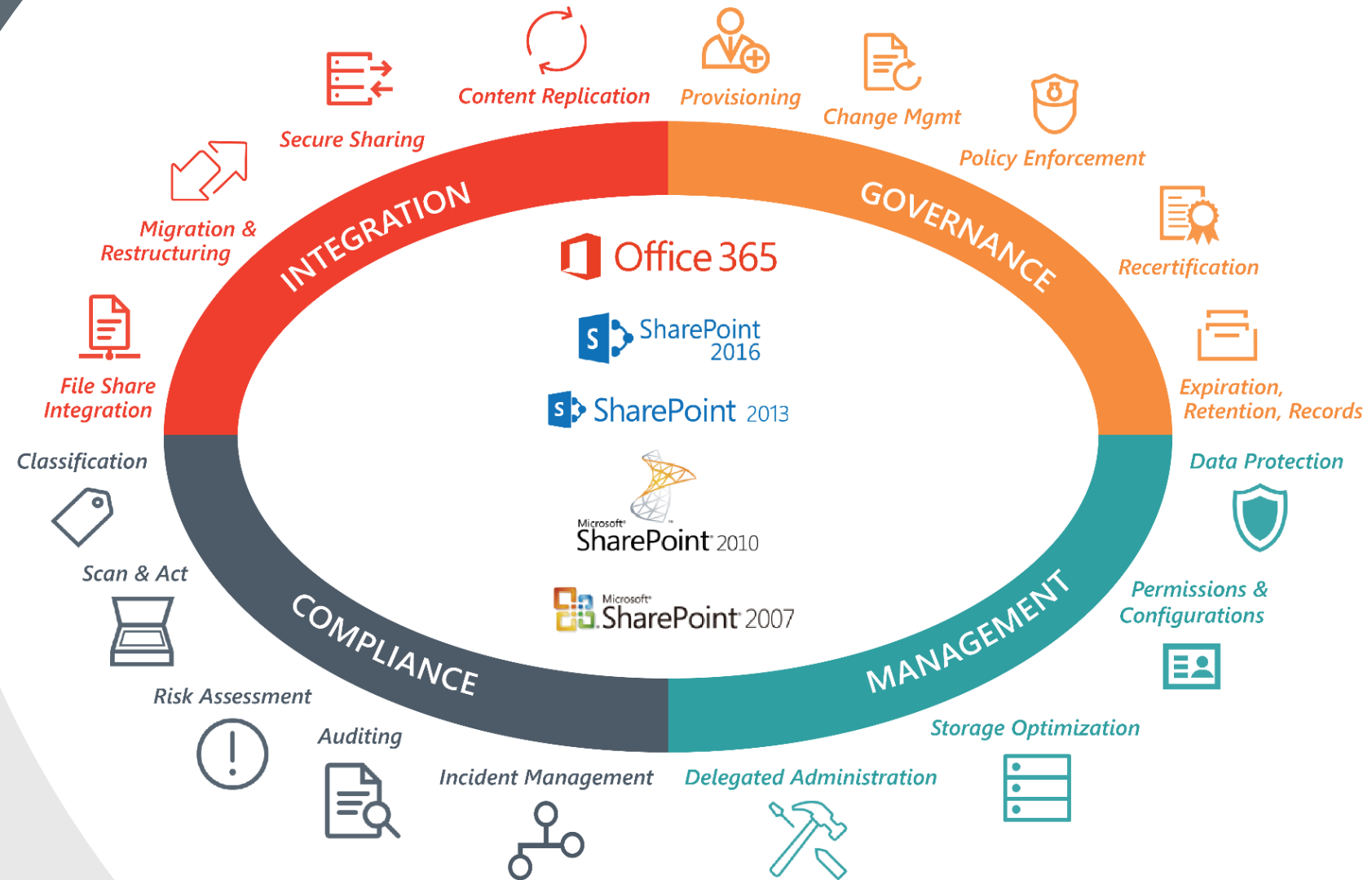
A seasoned consultant with a focus on digital collaboration and stakeholder engagement, Jay uses 20 years of IT experience to engage customers in designing solutions to increase the value and decrease risk of their Microsoft investments. Jay Leask is a Solutions Architect for AvePoint Public Sector and co-host of the "Speed of Technology Podcast, On the SPOT."

 [@jayleask](https://twitter.com/@jayleask)



# AvePoint's Solution Platform

Millions of users count on our software to integrate, manage, govern, and meet compliance requirements throughout their content's lifecycle, across SharePoint environments from 2007 to Office 365 across commercial and government clouds and on premises





# Objectives

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- Why Information Management and Governance are essential
- Information Management in Office 365 Recap
- Critical Strategies for Information Governance
- AvePoint's Information Governance Solution



CASE STUDY 1: Mistaken Identity

CASE STUDY 2: Sharing Woes

CASE STUDY 3: Audit & Compliance

## What happens if we don't have good Information Management in place?

SPRAWL

DISCOVERY

ACCESS ISSUES

R.O.T

COMPLIANCE

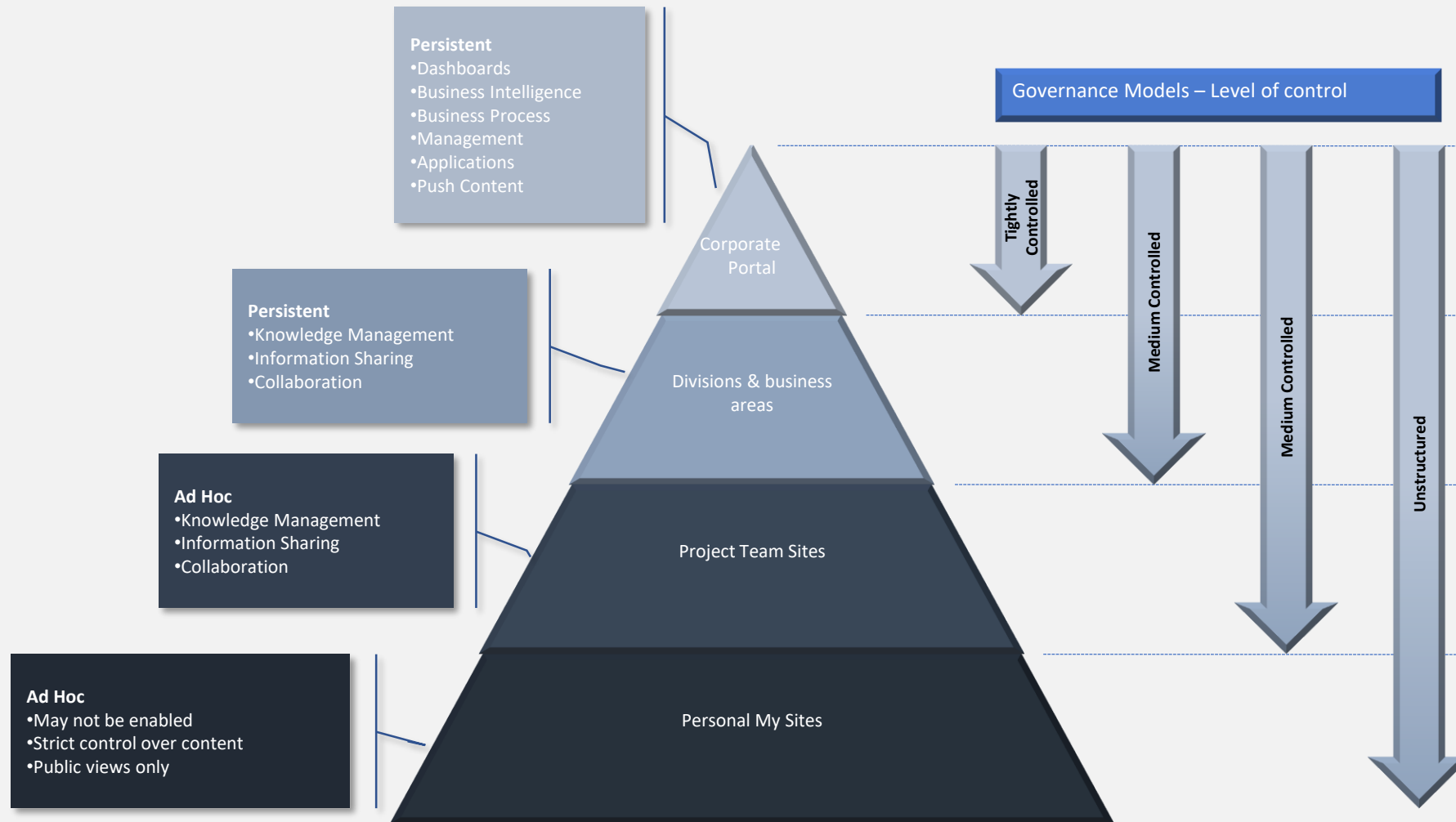
RETENTION



# 5 Crucial Information Governance Strategies

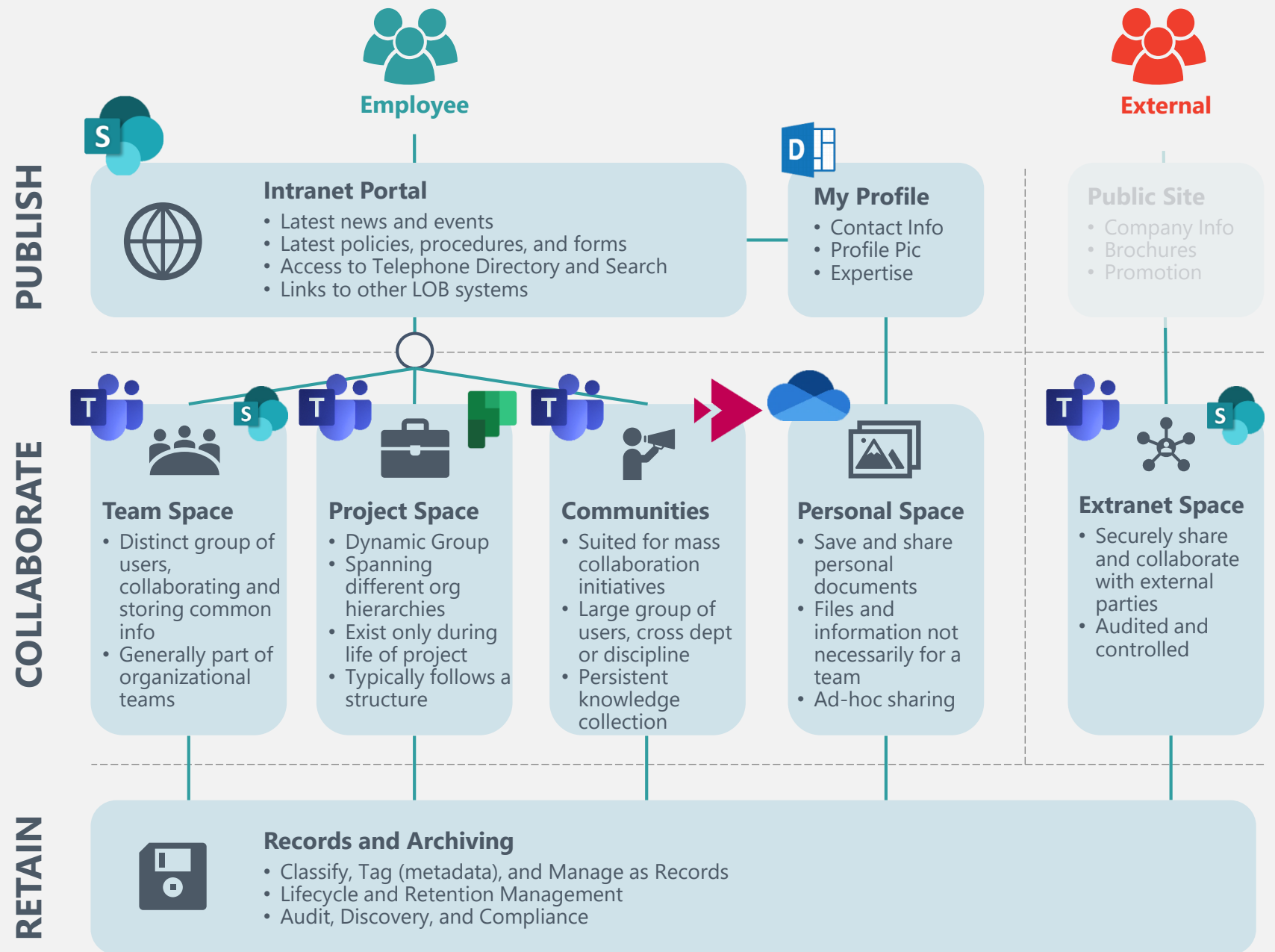


# Different Strategies for Different Information



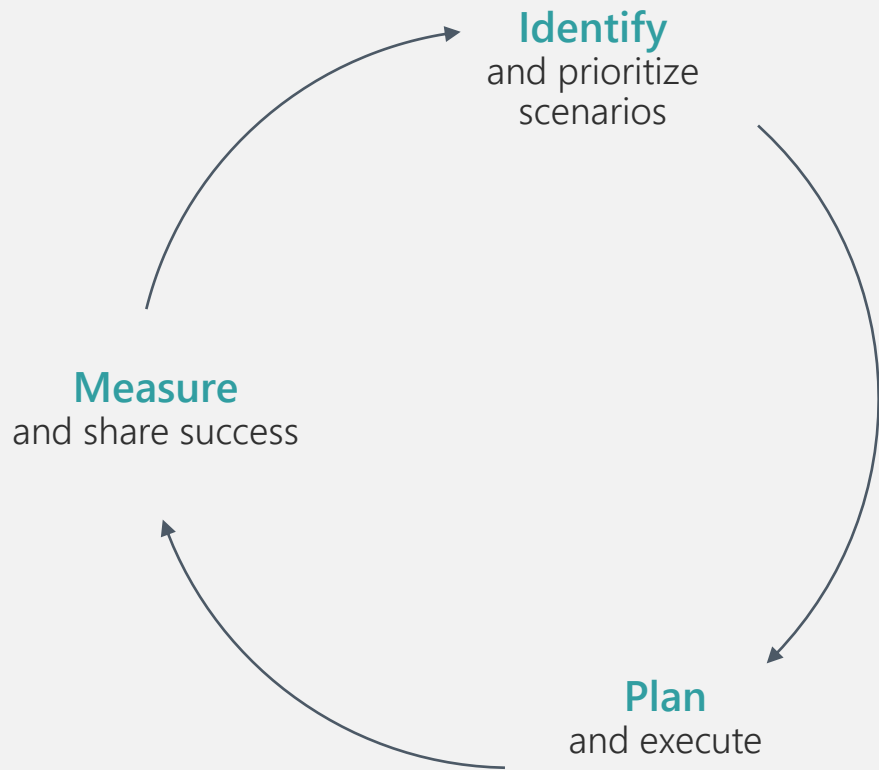
# A Best-Practice Approach to Information Architecture and Knowledge Management in Office 365

*Don't try and organize your information by department... think about the information type instead.*





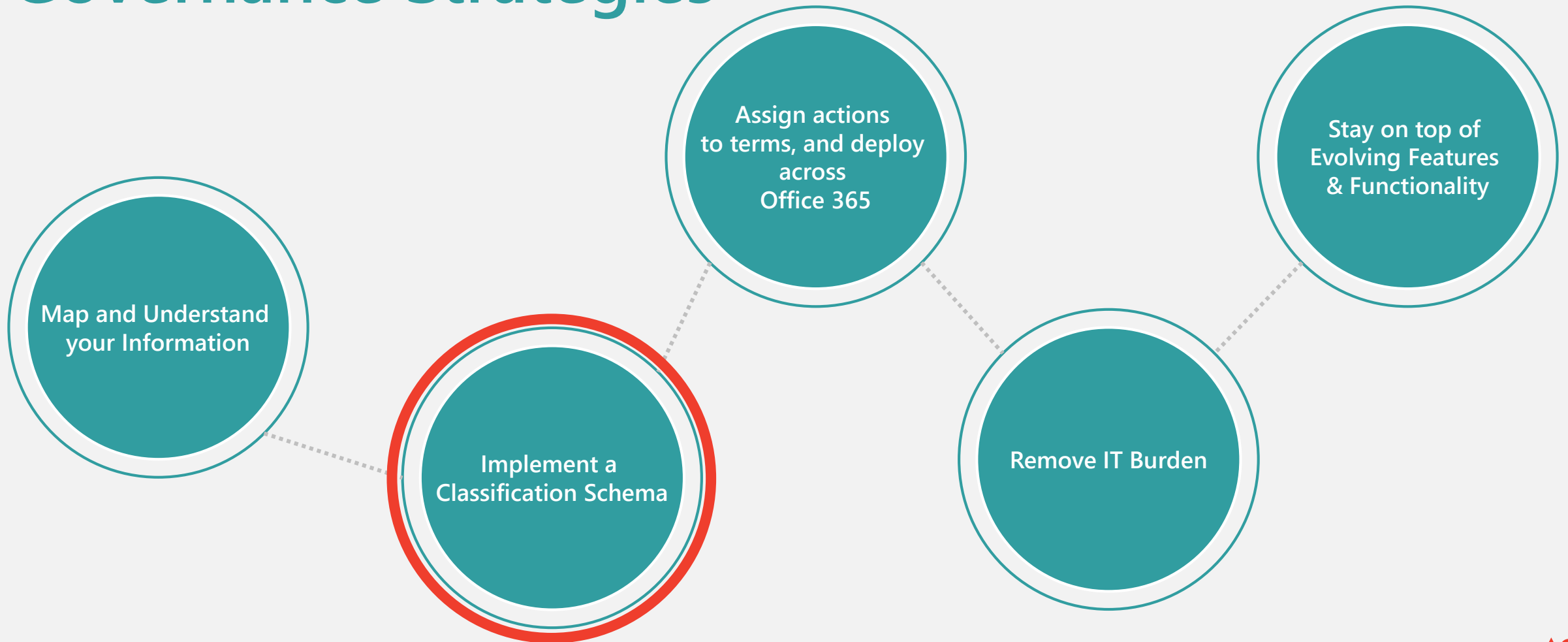
# Revision is Key: It's not Set and Forget



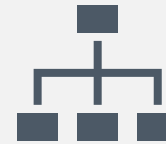
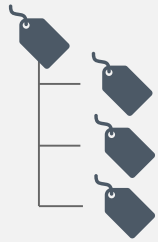
- Establish a common framework for IA: commonly a “Governance Plan”
- Make it widely available and simple language
- Periodically review for freshness



# 5 Crucial Information Governance Strategies



# Expanding tags and labels for classification



Defining Classifications	Associating outcomes with Classifications	Deploying Classifications and Outcomes to relevant locations	Classifying Content
Centralized definition of file classifications	Retain/Expire/Export according to <b>policy</b>	Classification branches available to <b>appropriate</b> audiences	Ensure accuracy while <b>minimizing</b> the burden on end users



# 5 Crucial Information Governance Strategies





# Anatomy of Key Information in Teams





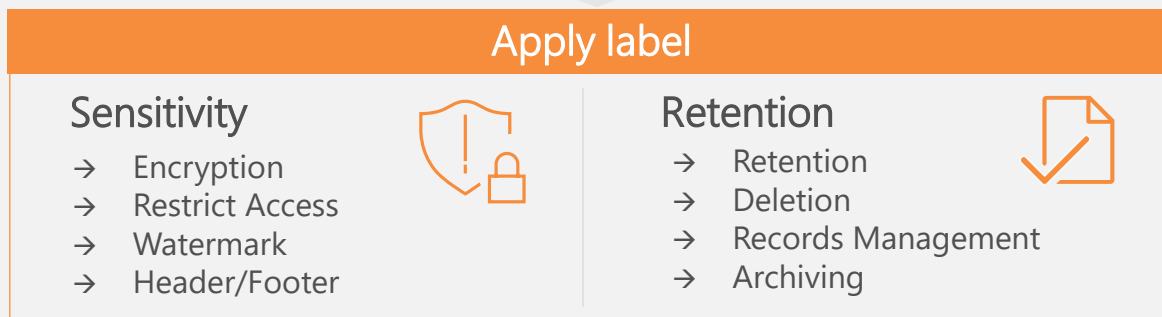
Conversations are journaled in Outlook

This can be searched and addressed in the Compliance Center

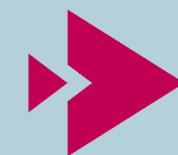
But document and file and attachment content is split across different sites in SharePoint and OneDrive

How can we manage all the content generated from here?

# Unified Labels enable IM for your Teams data!



Sensitivity Label		Retention Label	
Confidential		Corporate Files- 30 Years	
PII	Trade Secret	Administrative	
Yes	Yes	Project File	15 Years



# Example: Adding files to a Teams Channel

Documents ▸ Settings

General Settings

- List name, description and navigation
- Versioning settings
- Advanced settings
- Validation settings
- Column default value settings
- Audience targeting settings
- Rating settings
- Form settings

Permissions and Management

- Delete this document library
- Save document library as template
- Permissions for this document library
- Manage files which have no checked in version
- Apply label to items in this library
- Generate file plan report

Company : Edit Default Value

Default Value

Specify whether you want to apply a default value for this column to items added in this location.

☐ Do not specify a default value for this location

☒ Use this default value:

Default value:

Corporate-Files

OK Cancel

Settings ▸ Apply Label

Apply a label to items in this library

The labels here are provided by your organization to help retain and protect important information. When applied, all items in this library will be subject to the label's settings. For example, if you apply a label that retains content for 1 year, all new items in this library will inherit the label and be retained for 1 year. You can also apply the label to items that already exist in the library.

Corporate-Files

☐ Apply label to existing items in the library.

AvePoint | SharePoint Search

Marketing Public group

Not following Next steps 55 members

Home Conversations Documents Shared with us Notebook Pages Site contents Recycle bin Edit

+ New Upload Sync Export to Excel Flow All Documents

Documents

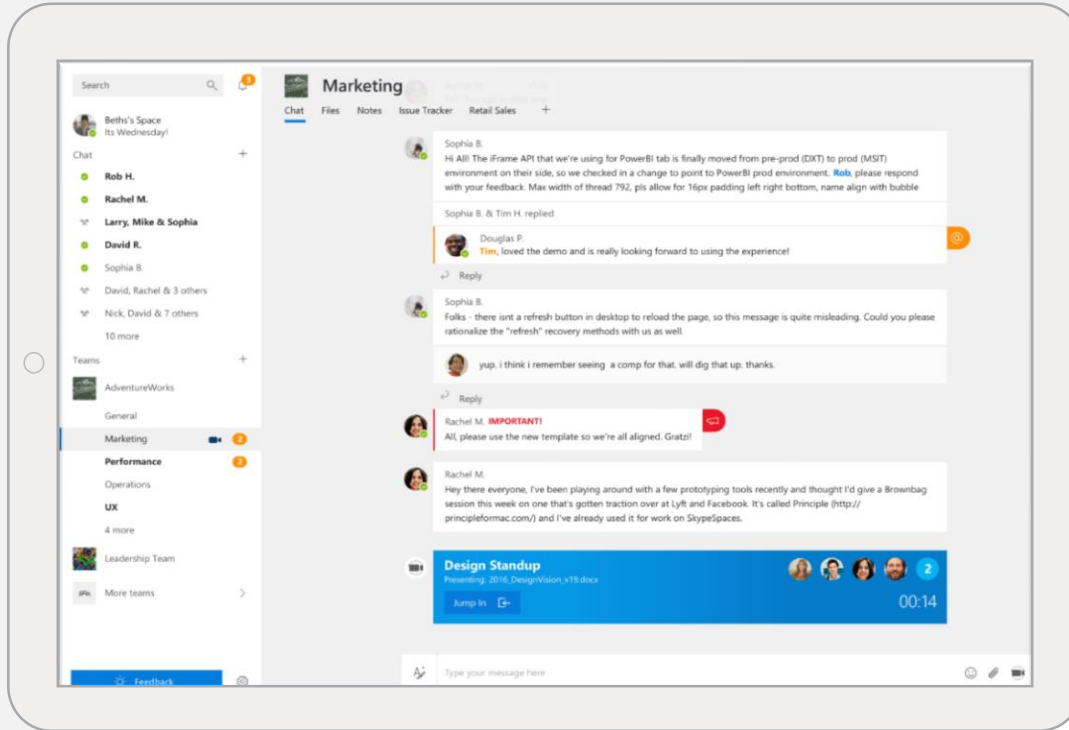
Name	Modified	Modified By	+ Add column
General	June 4	Julie Liu	
Hot Leads	4 days ago	Sarah Zalesiak	
Logistics	June 4	Julie Liu	
Meetings	June 4	Julie Liu	

Return to classic SharePoint

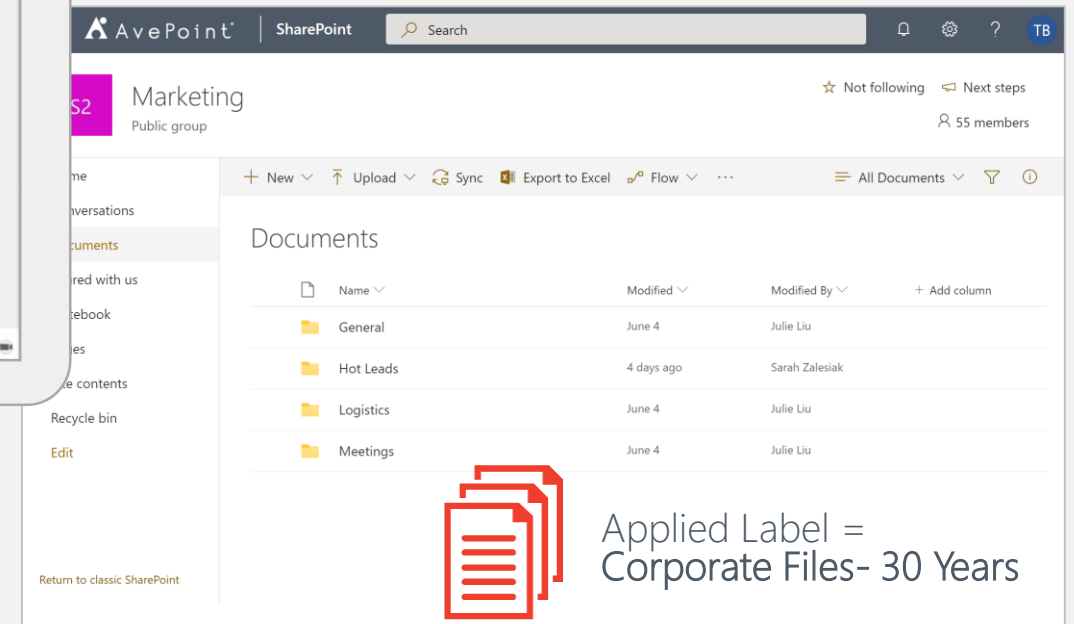
*Teams Channel and Chat Files are uploaded to SharePoint*



# Example: Adding files to a Teams Channel



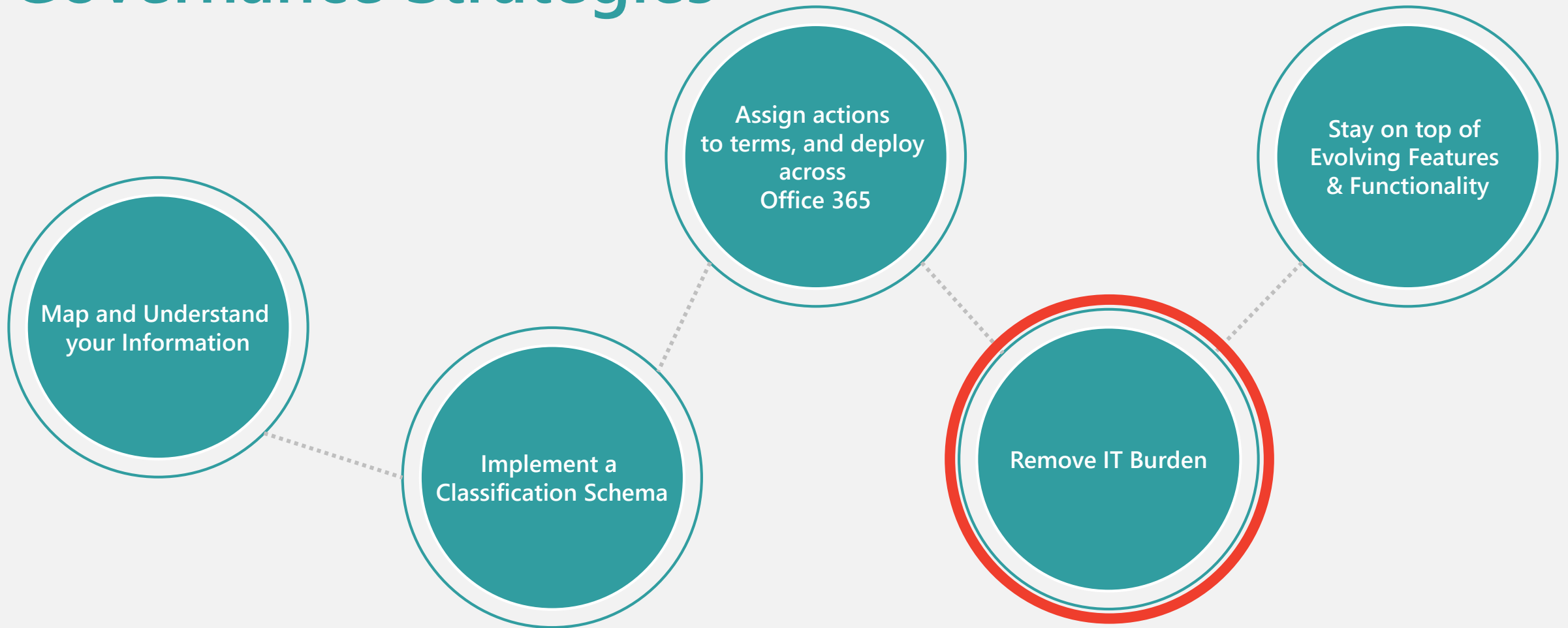
*Metadata automatically applied based on library settings*



Applied Label =  
Corporate Files- 30 Years



# 5 Crucial Information Governance Strategies





# Common Provisioning Considerations/Challenges



Self-Service / Who Can Request / Who Can Approve / Naming

How are Teams requested,  
approved and created

*Provisioning*



# How do you remove the burden on IT?

Cloud Governance

Search To-do List

Home  
Workspace  
Requests

+ New Request

New Request > Create Team

Step1. Request Info / Step2. Basic Info / Step3. Advanced Info

\* Request Summary

Need a Microsoft Team to work on Contoso Project

Notes to Approvers

This project involves working with external users

\* Department

Executive

Privacy

☒ Public - Anyone can see team content  
☐ Private - Only members can see team content

Subscribe Members

☒ Send copies of conversations and events to team members' inboxes  
☐ Don't send copies of conversations and events to team members' inboxes

Outside Senders

☒ Allow outside senders  
☐ Don't allow outside senders

\* Language

English

View: 100%

Select the option that describes you

1. Internal Team  
2. Communications Site  
3. Enterprise Messaging  
4. Email Group

Does a Team already exist, and you

Yes

If a Team alr

No

FI-JKM Team

Will other sites need to connect to

Yes

Will this site require additional cust

Yes

FI-JKM SPO Communications Site w Hub w DPM

No

FI-JKM SPO Communications Site

FI-JKM SPO Communications Site w Yammer

Will this site require additional cust

Yes

FI-JKM SPO Communications Site w DPM

No

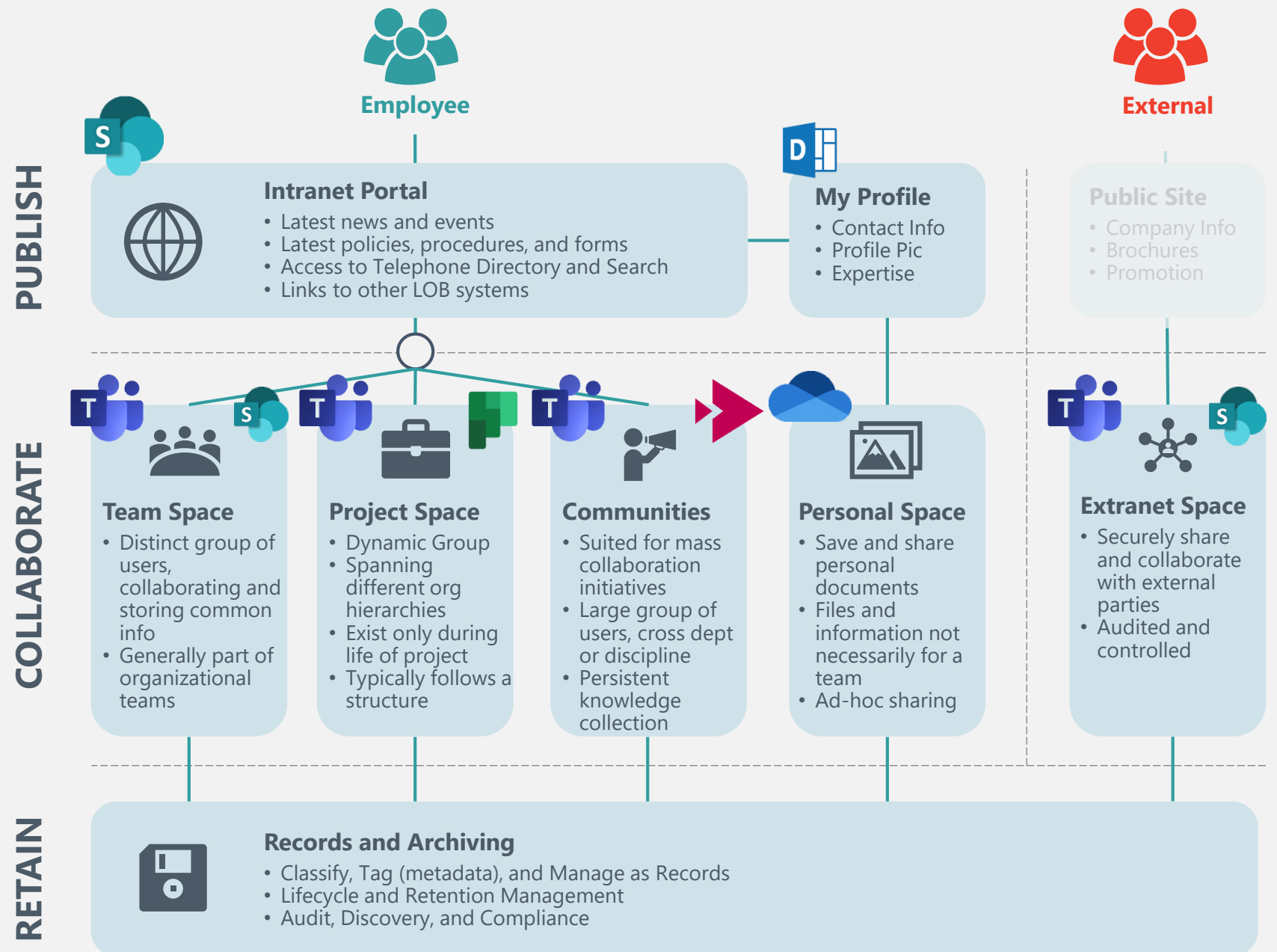
FI-JKM SPO Communications Site Plain

FI-JKM Email Group



# A Best-Practice Approach to Information Architecture and Knowledge Management in Office 365

*Don't try and organize your information by department... think about the information type instead.*





### Team Space

- Distinct group of users, collaborating and storing common info
- Generally part of organizational teams

**Backup:** All  
**External Users:** No  
**Recert:** None  
**Reporting:** Ad-hoc  
 +  
**Default Labels**  
**Metadata Presets**



### Project Space

- Dynamic Group
- Spanning different org hierarchies
- Exist only during life of project
- Typically follows a structure

**Backup:** All  
**External Users:** No  
**Recert:** End of Contract  
**Reporting:** Ad-hoc  
 +  
**Default Labels**  
**Metadata Presets**



### Extranet Space

- Securely share and collaborate with external parties
- Audited and controlled

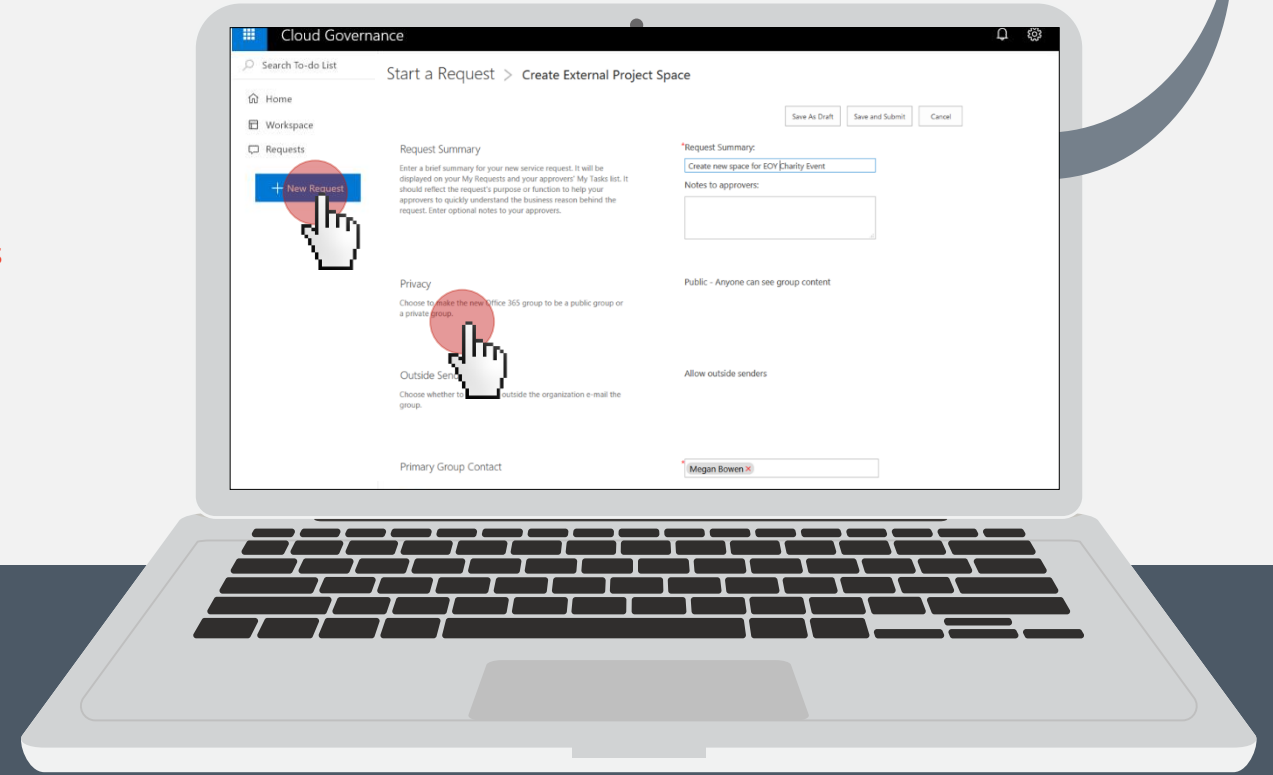
**Backup:** All  
**External Users:** Yes  
**Recert:** 6 Months  
**Reporting:** Annual  
 +  
**Default Labels**  
**Metadata Presets**

### EOY Charity Event

- External Sharing: On
- Recertification / Reporting: On
- URL: /sites/PROJ\_EOYCharityEvent

LABELLED

TAGGED



# Bringing It Together



Demo



# 5 Crucial Information Governance Strategies



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# thank you

Gracias

ευχαριστώ

Danke

Grazie

благодаря

Hvala

Obrigado

Kiitos

شكراً

Tak

Ahsante

Teşekkürler

متشكراً

Salamat Po

감사합니다

Cám ơn

شكريه

Terima Kasih

Dank u Wel

Děkuji

நன்றி

Köszönöm

ありがとう  
ございます

ໂພນລຸ້ນລຽ້ນ

Dziękuję

谢谢

Tack

Mulțumesc

спасибо

Merci

תודה

多謝晒

дядкую

Ďakujem



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