



# Information Management and Governance for Office 365 Workspace Lifecycle Control

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 value in O365, Sharepoint, and Teams. He uses this blend of business and technology to drive successful digital transformation and information management projects for clients.

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Jay Leask

Principal Solution Engineer

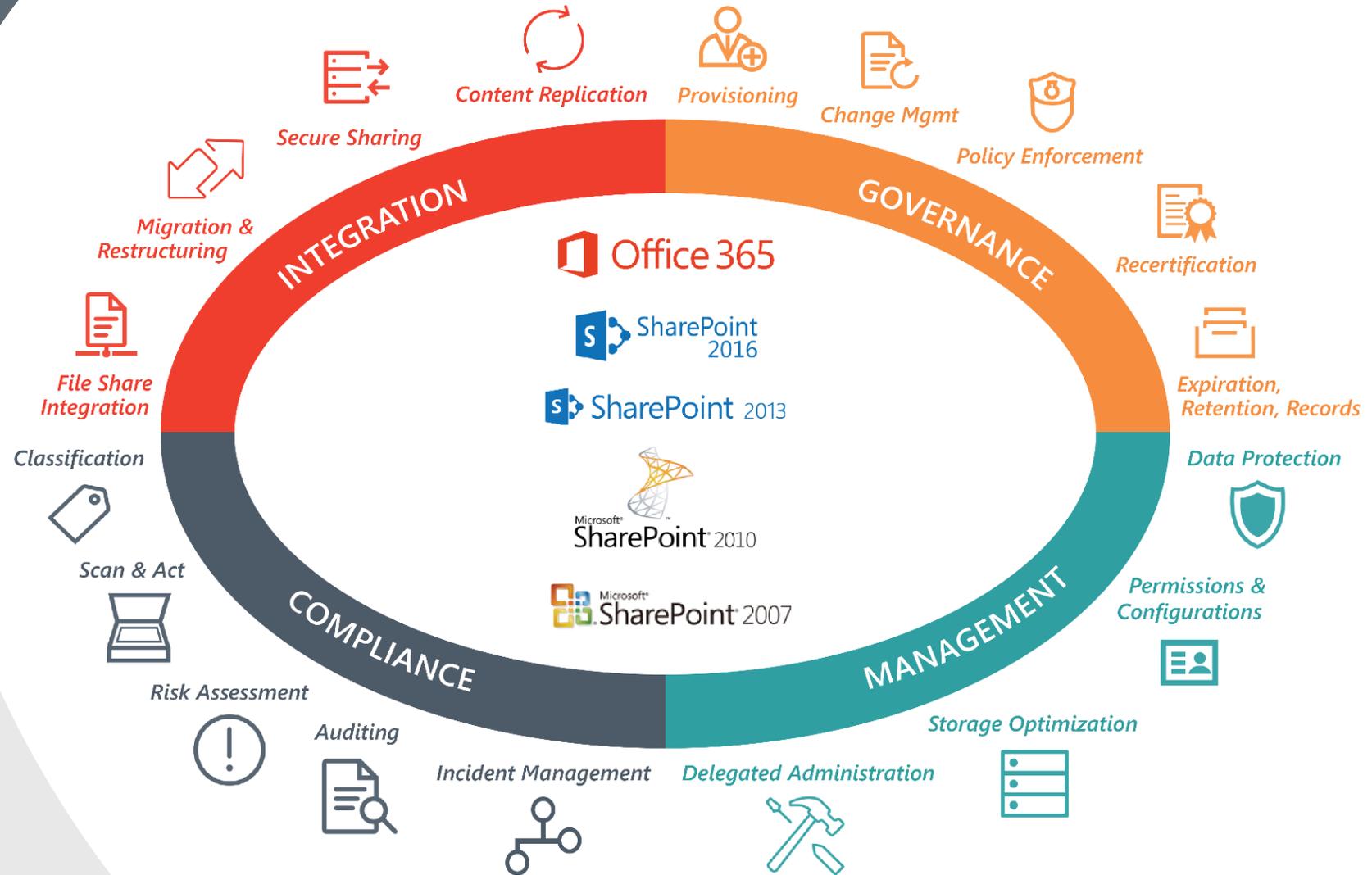
A seasoned consultant with a focus on digital collaboration and stakeholder engagement, Jay uses 20 years of IT experience to engage customers in designing solutions to increase the value and decrease risk of their Microsoft investments. Jay Leask is a Solutions Architect for AvePoint Public Sector and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

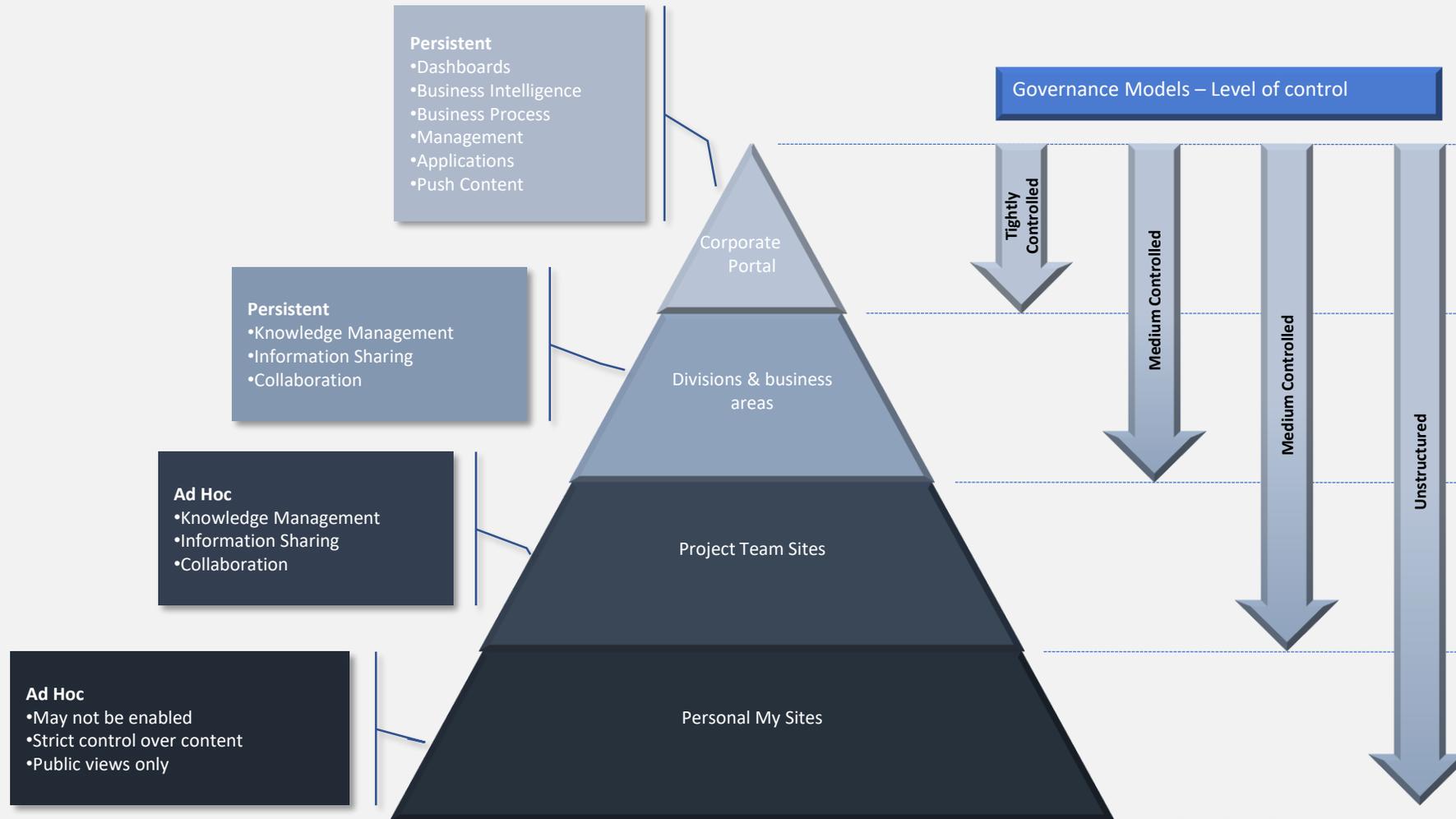
RETENTION



# 5 Crucial Information Governance Strategies

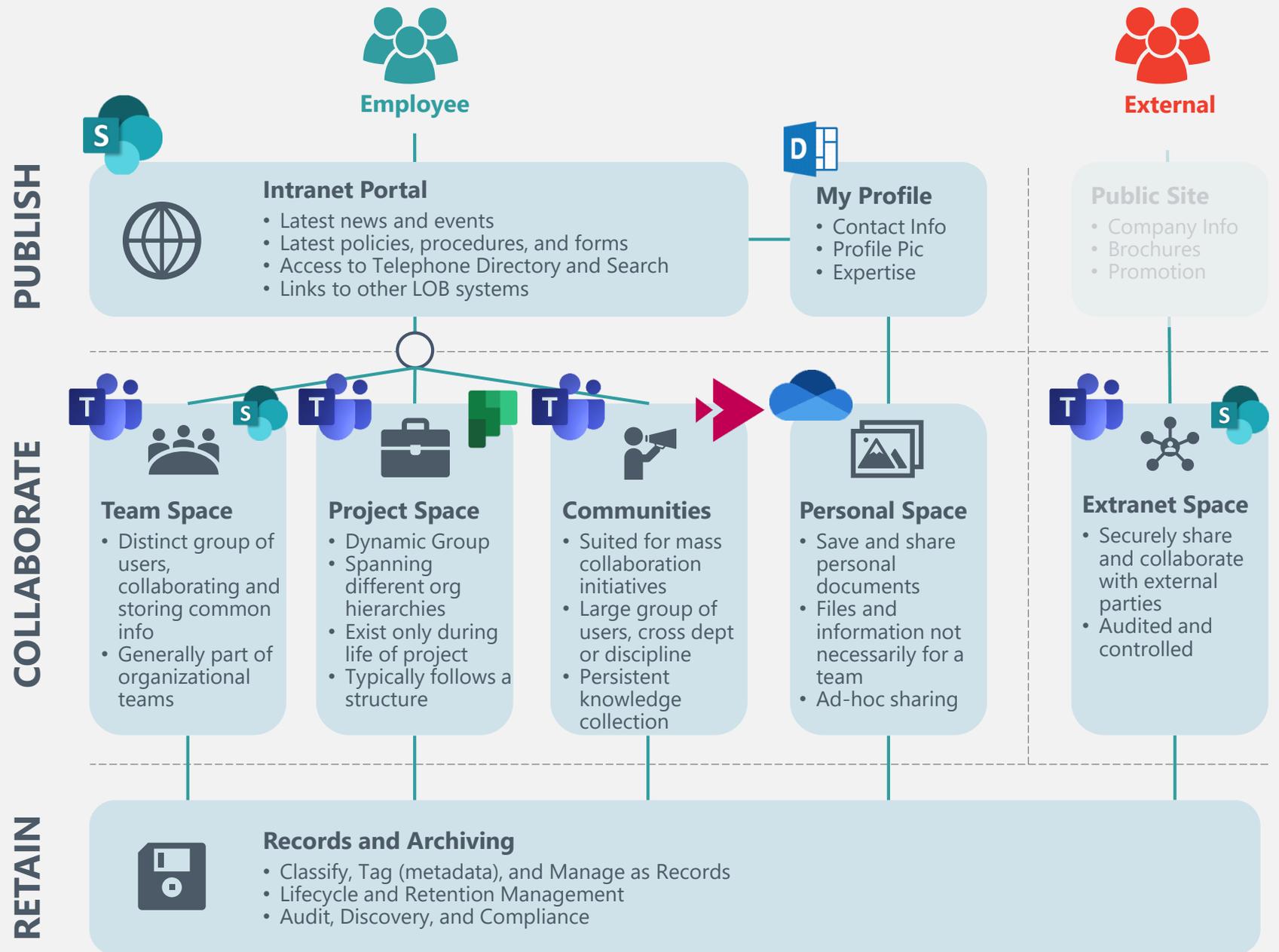


# Different Strategies for Different Information

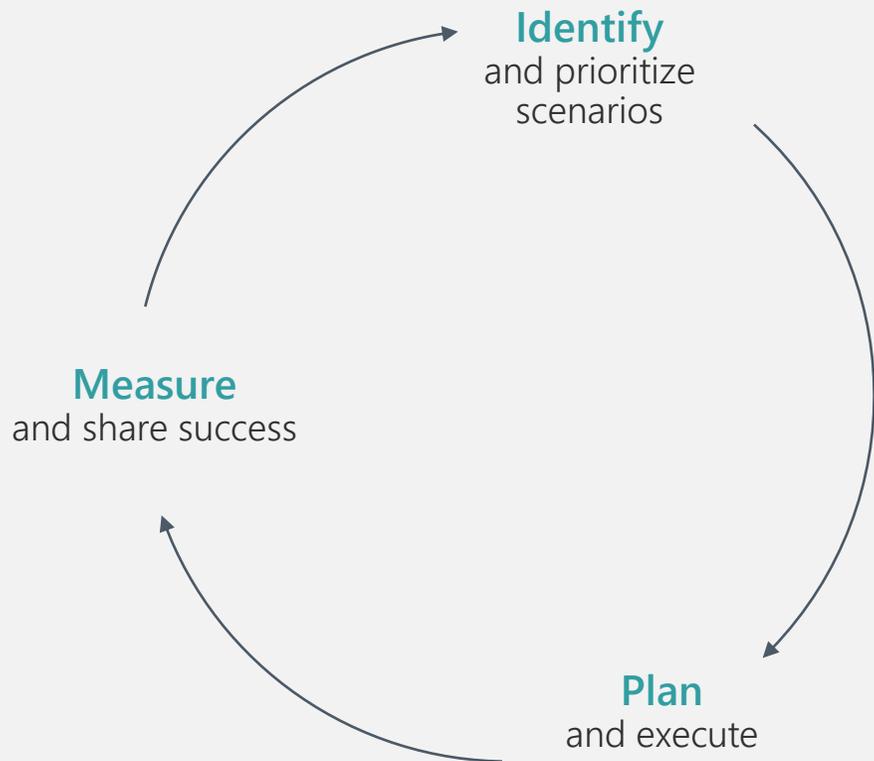


# A Best-Practice Approach to Information Architecture and Knowledge Management in Office 365

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



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



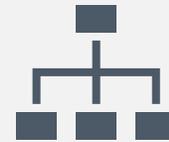
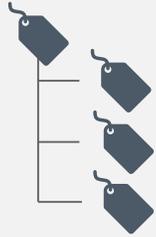
- Establish a common framework for IA: commonly a “Governance Plan”
- Make it widely available and simple language
- Periodically review for freshness



# 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?



What about Private Channels?

# 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 TB

S2 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

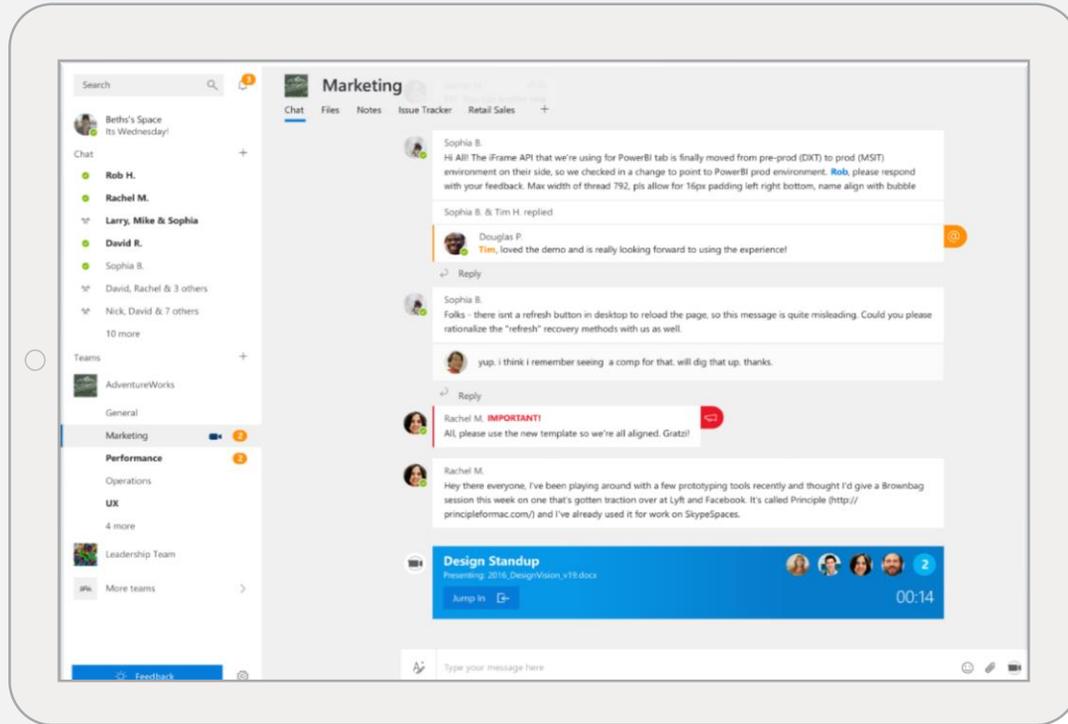
Name	Modified	Modified By	+ Add column
General	June 4	Julie Liu	
Hot Leads	4 days ago	Sarah Zalesiak	
Logistics	June 4	Julie Liu	
Meetings	June 4	Julie Liu	

Return to classic SharePoint

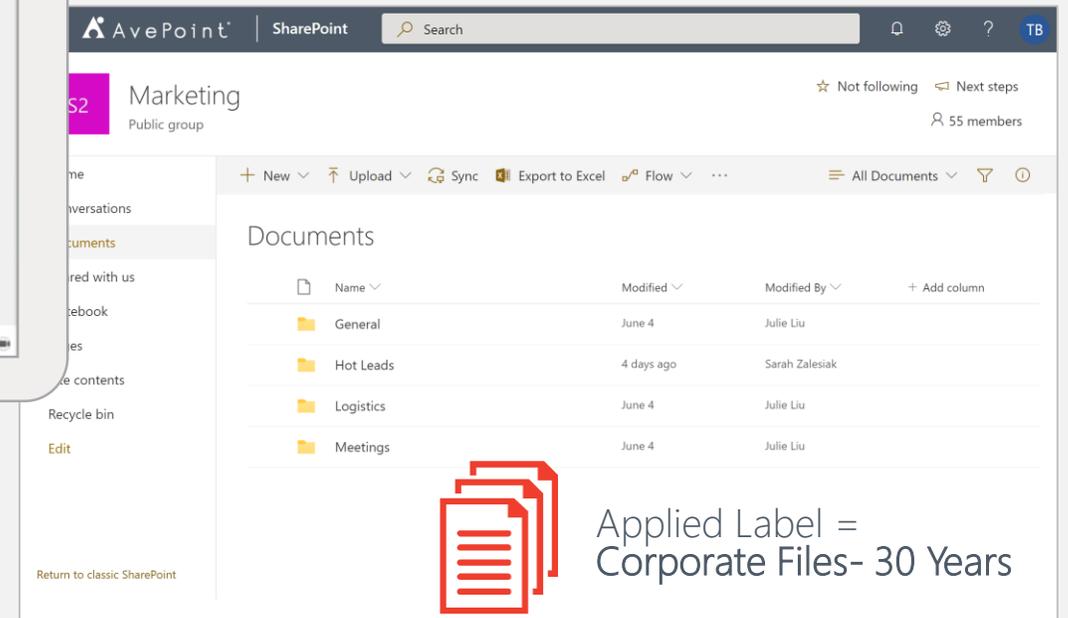
*Teams Channel and Chat Files are uploaded to SharePoint*



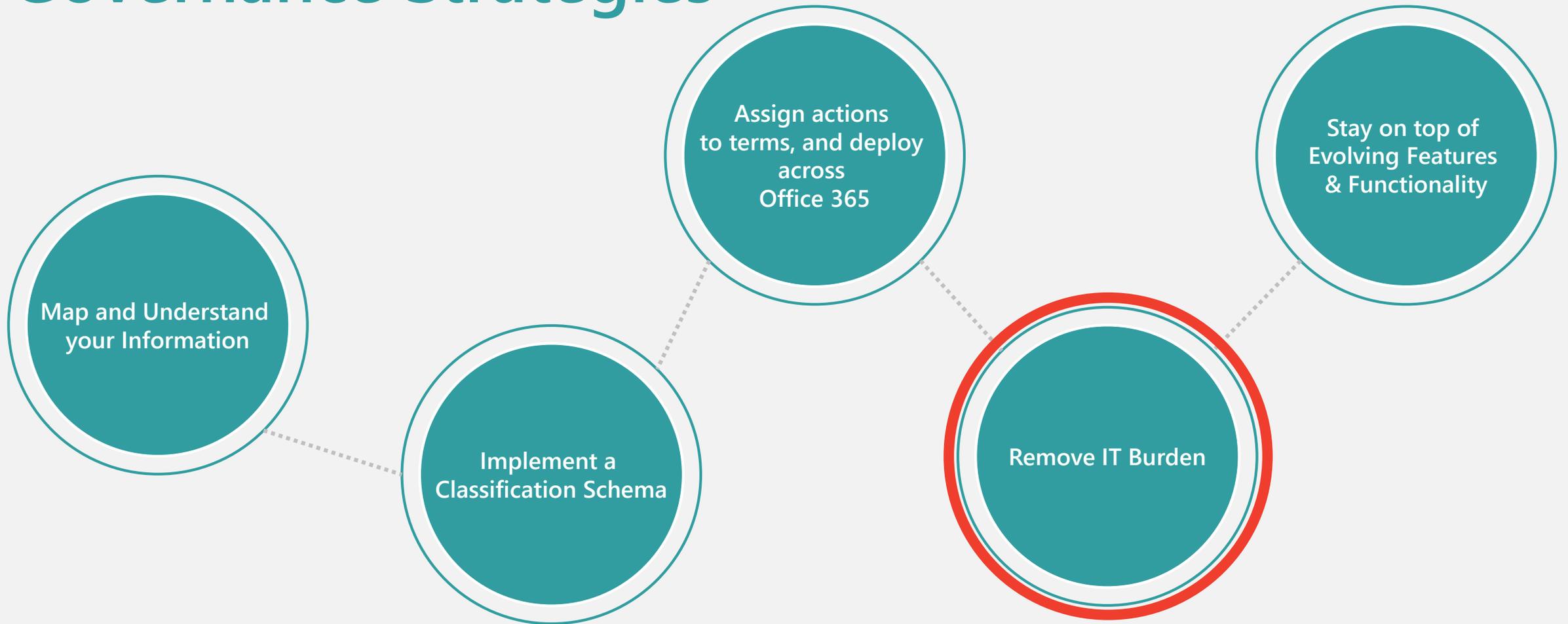
# Example: Adding files to a Teams Channel



*Metadata automatically applied based on library settings*



# 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?

The image displays a 'Cloud Governance' interface for creating a new team. The form is titled 'New Request > Create Team' and is in 'Step 1. Request Info'. It includes fields for a request summary, notes to approvers, department, privacy settings, and language. To the right, a decision flowchart guides the user through selecting a team type and determining additional requirements.

**Form Fields:**

- 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
- Subscribe Members:  Send copies of conversations and events to team members' inboxes
- Outside Senders:  Allow outside senders
- Language: English

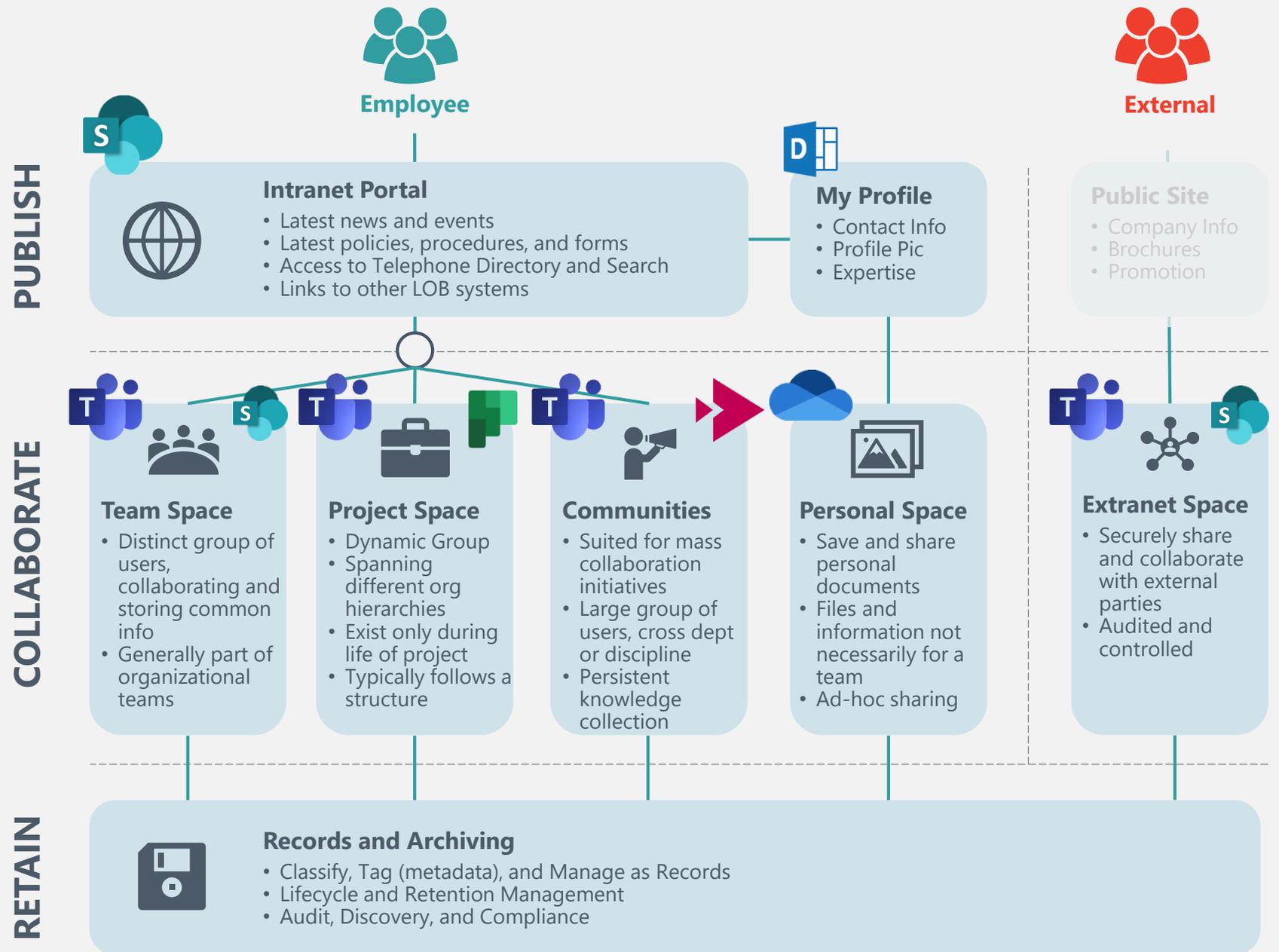
**Decision Flowchart:**

- Start: Select the option that describes you ...
  - 1. Internal Team
    - Does a Team already exist, and you ...
      - Yes: If a Team alr ...
      - No: FI-JKM Team
  - 2. Communications Site
    - 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
      - No: Will this site require additional cust ...
        - Yes: FI-JKM SPO Communications Site w DPM
        - No: FI-JKM SPO Communications Site Plain
  - 3. Enterprise Messaging: FI-JKM SPO Communications Site w Yammer
  - 4. Email Group: 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

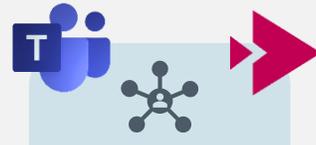
**Backup:** All  
**External Users:** No  
**Recert:** None  
**Reporting:** Ad-hoc  
 +  
**Default Labels**  
**Metadata Presets**



### 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**



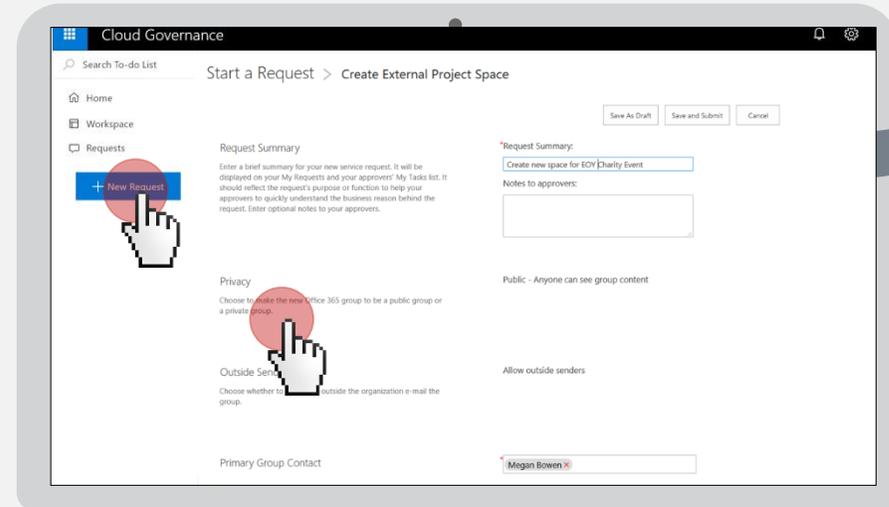
### EOY Charity Event

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



LABELLED

TAGGED



# Bringing It Together

# 5 Crucial Information Governance Strategies



7 days 30 days 90 days 180 days



Details

Username	Last activity date (UTC)	Teams chat messages	Private chat messages
133AECFA9E6EE18DB89D...	Thursday, September 14, 2017	239	332

Cloud Records

Last generation date:2018-06-07 14:16:37  
Next generation job will be started at:2018-06-08 14:16:00

Managed Records

5486

Destroyed Records

3251

Records Waiting for Approval

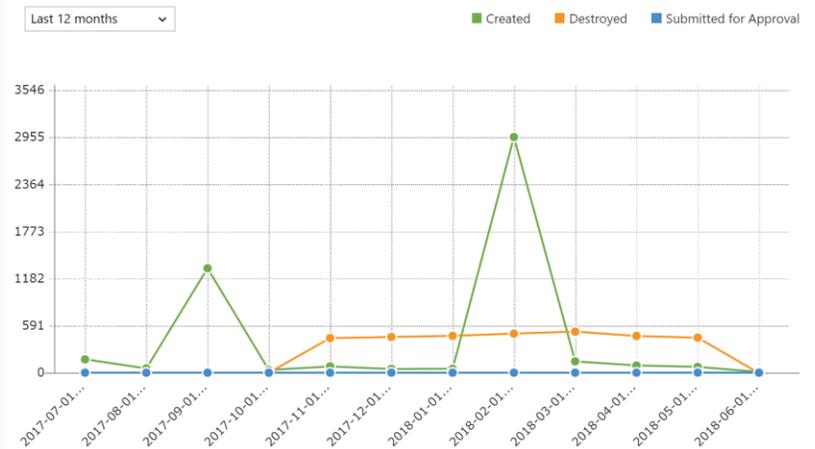
1

Records Waiting for Approval by Owner



Funtrol Ready 1

Record Volume by Status



# O365 resources to stay on top of what's next

- Microsoft 365 Public Roadmap
- AvePoint Product Updates for Subscribers
- [Success w/Teams Adoption Hub](#)
- [Microsoft Learning Pathways](#)
- [AvePoint's Teams Learning Series](#)
- [Microsoft Certified Service Adoption Specialist](#)

Microsoft | Microsoft 365 Products Resources Support All Microsoft

## Microsoft 365 Roadmap

Get the latest updates on our best-in-class productivity apps and intelligent cloud services. Rethink productivity, streamline business processes, and protect your business with Microsoft 365.

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[Microsoft 365 Ignite blog >](#)  
[Enterprise Mobility + Security Ignite blog >](#)

Search for a product, release or specific update

Filters | Clear all

Showing 654 updates<sup>1</sup>: O365

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In development	Rolling out	Launched
195	145	312

Description	Status	Tags	Release
Improvements in reporting of 'bad items' during mailbox migrations	In development	Exchange	Q3 CY2019
New Calendar App replaces Meetings App In Teams	In development	Microsoft Teams All environments	October CY2019
Outlook for Android: Time to leave notifications	In development	Worldwide (Standard Multi)	December CY2019



# 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

ໜ້ອບຄຸນຄຳ

Dziękuję

谢谢

Tack

Mulțumesc

спасибо

Merci

תודה

多謝晒

дякую

Ďakujem



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