

# You've deployed M365, now what?

## 3 Ways to Implement Operational Governance Today

Microsoft  
Partner



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

***Collaborate with Confidence***

Accessible content is available upon request.



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# Welcome to Microsoft 365!

## You are here. Now what?

### Discovery

*What's here? Is it being used? Do we still need everything?*

### Ongoing Management

*How to we manage content, prevent sprawl, and support the business?*

### Lifecycle Management

*Governance and policies are in place. Now's the time to work the plan.*



# Typical Office 365 Journey

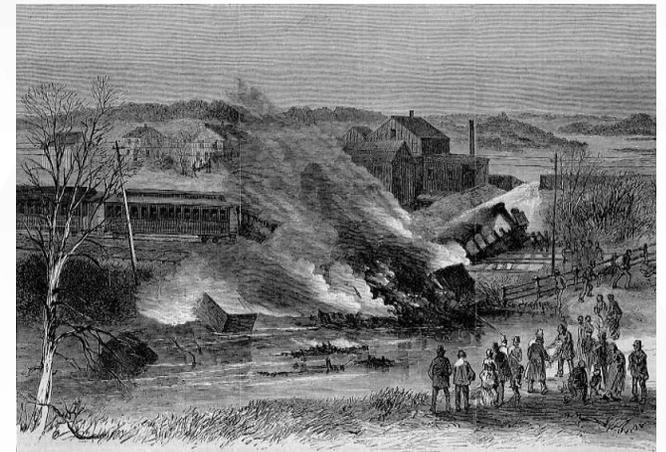
Evaluation/ Planning



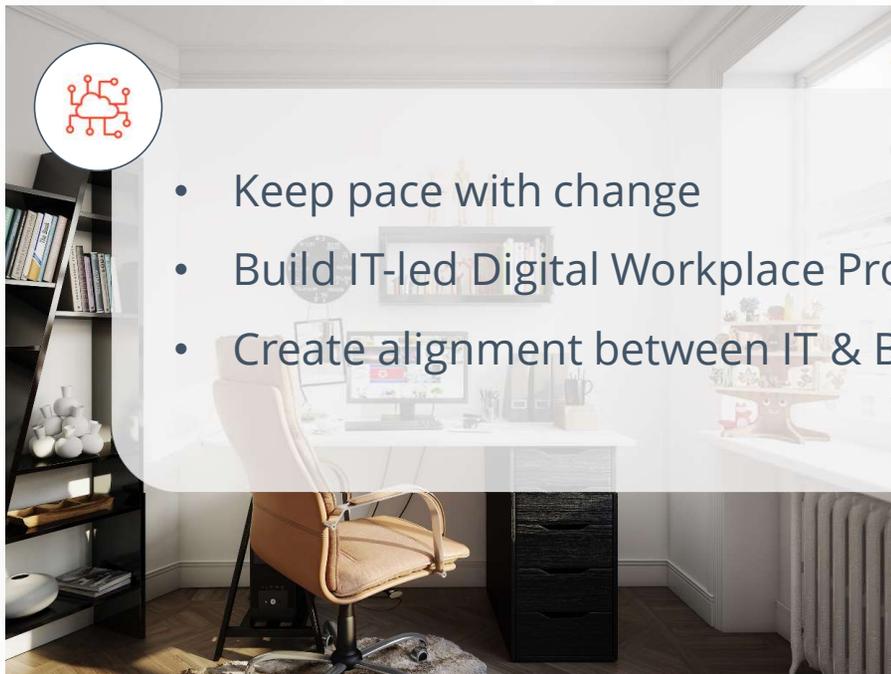
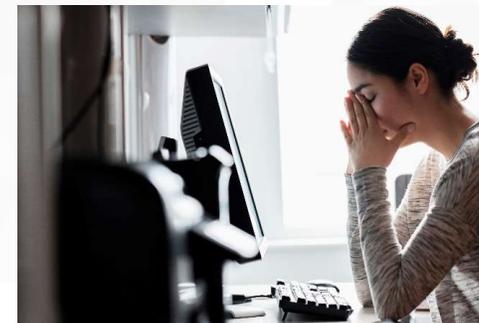
Preparing for day 1



What about day 2?



*It's a whole new world for all of us.*



- Keep pace with change
- Build IT-led Digital Workplace Program
- Create alignment between IT & Business



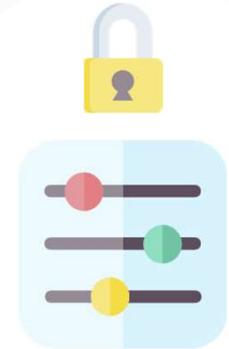
# Some key differences in M365...



Office 365 gives “Owners” significant privilege



Anyone can be an owner, but even members can share content



THE ANSWER: Right-sizing control based on risk

# “Governance” for M365

## M365 Modern Workplace

(Broad, organization-wide)

### Operational Governance

(Application-specific, aligns with IT Governance goals)

### Data Governance

(Content-specific, aligns with IT Governance goals)

Workspace  
Provisioning

Ongoing  
Management  
&  
Enforcement

Lifecycle and  
EOL for  
Workspaces

Item-level  
Retention &  
Expiration

Records  
Mgmt

Classification

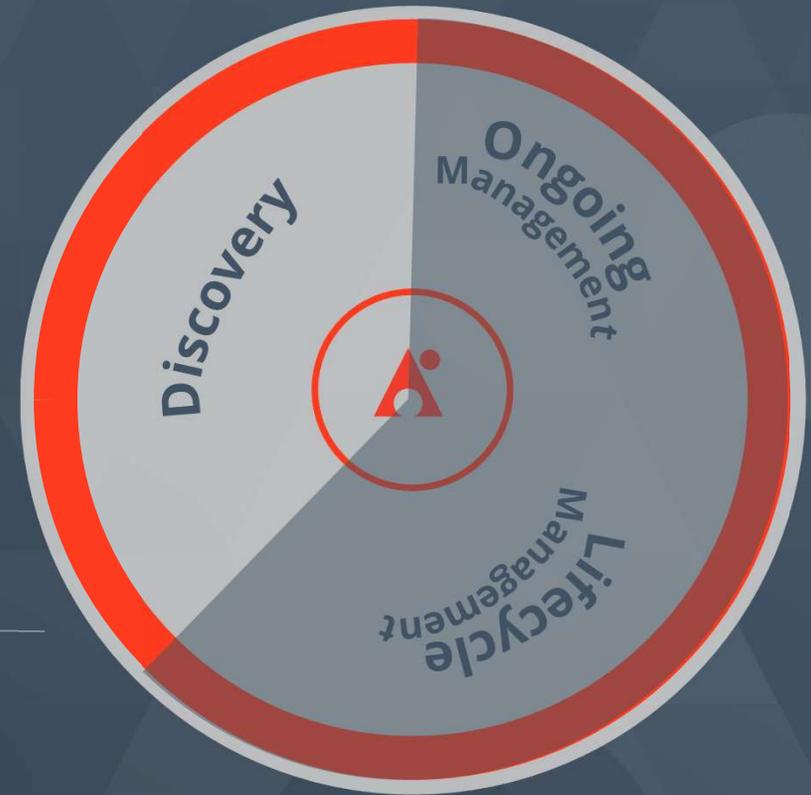
DLP



**Consider a practical  
operational governance  
approach**



# Discovery



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# What is sprawl?



Not a number...  
*... just more than you can effectively manage*

# Sprawl

NOUN

*sprawl* (noun) · *sprawls* (plural noun)

1. an ungainly or carelessly relaxed position in which one's arms and legs are spread

- a group or mass of something that has spread out in an untidy or irregular way:  
"a sprawl of buildings"

perceived to be disorganized and unattractive:  
"the growth of urban sprawl"

Also, unmanaged Teams, Channels, sites, and other M365 content



## Doing the math...

Default  
Team Site  
Collection  
created



Up to **30**  
Private  
Channels  
per Team



Up to **50**  
Shared  
Channels  
per Team



***Up to 81***  
*Site  
Collations  
per Team!*

—  
Am I going  
to...  
“run out” of  
sites?

~~500,000~~  
2,000,000!!!



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Am I going  
to...  
"run out" of  
sites?

How am I  
going to  
manage all  
these sites?

~~500,000~~  
2,000,000!!!



# So, does Microsoft have me covered with all these new “channel” sites?



## The good news...

- Lifecycle of the Site largely mastered by the channel
- SPO permissions largely managed by Teams
- “Policies” generally flow down from Team
- Decent visibility of team association, but will get better

## The bad news

- Ad-hoc “Sharing” still allowed and still needs to be managed
- “Hide and seek” approach to visibility of these channels in SPO admin center
- Differences in “soft delete” timing mean Sites may be restored separate from Channel



# How do we tame the Sprawl?

## Inventory the Content

You can't manage content if you don't know it's there

- What do we have?
  - Communication sites
  - Teams Sites
  - Teams
  - Channels
- Who owns it?
- How is it being used?



Decide what to do with the stuff you haven't “unpacked” since the move!



# Workspace Cataloging with AvePoint Cloud Governance

- Inventory of all collaborative workspaces, guest users, etc.
- Map all shared spaces back to business unit, purpose, sensitivity, etc.
- Monitor compliance status and produce audit trail for requests and changes to membership and permissions

AvePoint Cloud Governance - Workspace report

Compliance status: Renewal pending

All M365 workspace types

Phase	Name	Status	Type	URL	Policy	Primary admin	Primary Data Ow...	Secondary contact	Classification
Deleted	R&D Team Site	Deleted	Site Collection	https://avepointatd...	SC Internal Policy	Barlemore Barlow	Ian Anderson	Ray Hill	-
Archived	Quarterly Conference	Archived	Microsoft Team	https://avepointatd...	Internal Group Team...	Barlemore Barlow	Barlemore Barlow	Ian Anderson	No
Active	Q2 Chating	Active	Microsoft Team	https://avepointatd...	Guest Group Team P...	Barlemore Barlow, R...	Ray Hill	Ian Anderson	No
Active	public/private	Active	Microsoft Team	https://avepointatd...	-	Barlemore Barlow	-	-	-
Deleted	Public-Team_Lifaso	Deleted	Microsoft Team	https://avepointatd...	Private Team Policy	Ray Hill, Ian Anderson	Ray Hill	Ian Anderson	-
Deleted	Public-ShareDeal	Deleted	Microsoft Team	https://avepointatd...	Private Team Policy	Ray Hill	Ray Hill	Ian Anderson	-
Deleted	Public-SalesWestVAT	Deleted	Microsoft Team	https://avepointatd...	Private Team Policy	Ray Hill	Barlemore Barlow	Ray Hill	-
Deleted	Public-ProductXYZ	Deleted	Microsoft Team	https://avepointatd...	Public Short Term Te...	Ray Hill	Ray Hill	Ian Anderson	-
Deleted	Public-PDF	Deleted	Microsoft 365 Group	https://avepointatd...	Private Team Policy	Ian Anderson	Ian Anderson	Ray Hill	No
Deleted	Public-New Marketing	Deleted	Microsoft Team	https://avepointatd...	Public Short Term Te...	Ian Anderson	-	Ray Hill	-
Deleted	Public-MarketingEvents	Deleted	Microsoft Team	https://avepointatd...	Public Short Term Te...	Ray Hill	Ray Hill	Ian Anderson	-
Deleted	Public-SalesWestVAT	Deleted	Microsoft Team	https://avepointatd...	Private Team Policy	Ray Hill	Barlemore Barlow	Ray Hill	-
Deleted	Public-ProductXYZ	Deleted	Microsoft Team	https://avepointatd...	Public Short Term Te...	Ray Hill	Ray Hill	Ian Anderson	-
Deleted	Public-PDF	Deleted	Microsoft 365 Group	https://avepointatd...	Private Team Policy	Ian Anderson	Ian Anderson	Ray Hill	No
Deleted	Public-New Marketing	Deleted	Microsoft Team	https://avepointatd...	Public Short Term Te...	Ian Anderson	-	Ray Hill	-
Deleted	Public-MarketingEvents	Deleted	Microsoft Team	https://avepointatd...	Public Short Term Te...	Ray Hill	Ray Hill	Ian Anderson	-
Deleted	Public-internal_project	Deleted	Microsoft 365 Group	https://avepointatd...	Private Team Policy	Ray Hill	Barlemore Barlow	Ian Anderson	No
Deleted	Public-internal_Project	Deleted	Microsoft Team	https://avepointatd...	Private Team Policy	Ray Hill	Ray Hill	Ian Anderson	-
Deleted	Public-internal HR Proj	Deleted	Microsoft Team	https://avepointatd...	Public Team Policy	Ray Hill	Ray Hill	Ian Anderson	-
Deleted	PublicHRUpdates	Deleted	Microsoft Team	https://avepointatd...	Public Team Policy	Ray Hill	Ray Hill	Ian Anderson	-
Deleted	PublicHRCommunicati	Deleted	Microsoft Team	https://avepointatd...	Public Team Policy	Ray Hill	Ray Hill	Ian Anderson	-
Deleted	PublicGroup-Example	Deleted	Microsoft 365 Group	https://avepointatd...	Public Team Policy	Barlemore Barlow	Srequester	Smanager@srequester	-

AvePoint Cloud Governance - Workspace report

Any additional Metadata

Phase	Name	Status	Type	URL	Policy	Primary admin	Primary Data Ow...	Secondary contact	Classification
Deleted	R&D Team Site	Deleted	Site Collection	https://avepointatd...	SC Internal Policy	Barlemore Barlow	Ian Anderson	Ray Hill	-
Archived	Quarterly Conference	Archived	Microsoft Team	https://avepointatd...	Internal Group Team...	Barlemore Barlow	Barlemore Barlow	Ian Anderson	No
Active	Q2 Chating	Active	Microsoft Team	https://avepointatd...	Guest Group Team P...	Barlemore Barlow, R...	Ray Hill	Ian Anderson	No
Active	public/private	Active	Microsoft Team	https://avepointatd...	-	Barlemore Barlow	-	-	-
Deleted	Public-Team_Lifaso	Deleted	Microsoft Team	https://avepointatd...	Private Team Policy	Ray Hill, Ian Anderson	Ray Hill	Ian Anderson	-
Deleted	Public-ShareDeal	Deleted	Microsoft Team	https://avepointatd...	Private Team Policy	Ray Hill	Ray Hill	Ian Anderson	-
Deleted	Public-SalesWestVAT	Deleted	Microsoft Team	https://avepointatd...	Private Team Policy	Ray Hill	Barlemore Barlow	Ray Hill	-
Deleted	Public-ProductXYZ	Deleted	Microsoft Team	https://avepointatd...	Public Short Term Te...	Ray Hill	Ray Hill	Ian Anderson	-
Deleted	Public-PDF	Deleted	Microsoft 365 Group	https://avepointatd...	Private Team Policy	Ian Anderson	Ian Anderson	Ray Hill	No
Deleted	Public-New Marketing	Deleted	Microsoft Team	https://avepointatd...	Public Short Term Te...	Ray Hill	Ray Hill	Ian Anderson	-
Deleted	Public-MarketingEvents	Deleted	Microsoft Team	https://avepointatd...	Public Short Term Te...	Ray Hill	Ray Hill	Ian Anderson	-
Deleted	Public-SalesWestVAT	Deleted	Microsoft Team	https://avepointatd...	Private Team Policy	Ray Hill	Barlemore Barlow	Ray Hill	-
Deleted	Public-ProductXYZ	Deleted	Microsoft Team	https://avepointatd...	Public Short Term Te...	Ray Hill	Ray Hill	Ian Anderson	-
Deleted	Public-PDF	Deleted	Microsoft 365 Group	https://avepointatd...	Private Team Policy	Ian Anderson	Ian Anderson	Ray Hill	No
Deleted	Public-New Marketing	Deleted	Microsoft Team	https://avepointatd...	Public Short Term Te...	Ian Anderson	-	Ray Hill	-
Deleted	Public-MarketingEvents	Deleted	Microsoft Team	https://avepointatd...	Public Short Term Te...	Ray Hill	Ray Hill	Ian Anderson	-
Deleted	Public-internal_project	Deleted	Microsoft 365 Group	https://avepointatd...	Private Team Policy	Ray Hill	Barlemore Barlow	Ian Anderson	No
Deleted	Public-internal_Project	Deleted	Microsoft Team	https://avepointatd...	Private Team Policy	Ray Hill	Ray Hill	Ian Anderson	-
Deleted	Public-internal HR Proj	Deleted	Microsoft Team	https://avepointatd...	Public Team Policy	Ray Hill	Ray Hill	Ian Anderson	-
Deleted	PublicHRUpdates	Deleted	Microsoft Team	https://avepointatd...	Public Team Policy	Ray Hill	Ray Hill	Ian Anderson	-
Deleted	PublicHRCommunicati	Deleted	Microsoft Team	https://avepointatd...	Public Team Policy	Ray Hill	Ray Hill	Ian Anderson	-
Deleted	PublicGroup-Example	Deleted	Microsoft 365 Group	https://avepointatd...	Public Team Policy	Barlemore Barlow	Srequester	Smanager@srequester	-

Choose columns (14)

- Claim status
- Renewal profile
- Lifecycle Informations
- Created time
- Leave expiration time
- Inactivity threshold time
- Active lifecycle tasks
- Phase assignme
- Renewal start time
- Renewal due date
- Next removal date
- Last renewal time
- Additional Information
- Access Level
- Classification
- Critical Business Application
- Customer ID
- Customer Name
- Line of service
- Last renewal time
- Additional Information
- Access Level
- Classification
- Critical Business Application
- Customer ID
- Customer Name
- Line of Service
- Matter Number
- Matter Approver
- Migration Service
- Object Type
- Office Abbreviation
- Office Name
- Practice Area

# ... and full details on data ownership, classification, compliance and more...

The screenshot displays the Microsoft Azure Cloud Governance interface. The main area shows a 'Workspace report' table with columns for Phase, Name, Status, Type, Privacy, and Policy. The 'Q2 Outing' workspace is highlighted as 'Active' and 'Private'.

Phase	Name	Status	Type	Privacy	Policy
🟢	R&D Team Site	Deleted	Site Collection		SC Intranet Policy
🟢	Quarterly Conference	Archived	Microsoft Team	Public	Internal Group Team P...
🟢	Q2 Outing	Active	Microsoft Team	Private	Guest Group Team P...
🟢	publictoprivate	Active	Microsoft Team	Private	-
🟢	Public_Team_ElPaso	Deleted	Microsoft Team	Public	Private Team Policy
🟢	Public-ShoeDeal	Deleted	Microsoft Team	Public	Private Team Policy
🟢	Public-SalesWestVAT	Deleted	Microsoft Team	Public	Private Team Policy
🟢	PublicProductXYZ	Deleted	Microsoft Team	Private	Public Short Term Te...
🟡	Public-PDT	Deleted	Microsoft 365 Group	Public	Private Team Policy
🟢	Public-New Marketing	Deleted	Microsoft Team	Public	Public Short Term Te...
🟢	PublicMarketingEvents	Deleted	Microsoft Team	Private	Public Short Term Te...
🟢	Public-SalesWestVAT	Deleted	Microsoft Team	Public	Private Team Policy
🟢	PublicProductXYZ	Deleted	Microsoft Team	Private	Public Short Term Te...
🟡	Public-PDT	Deleted	Microsoft 365 Group	Public	Private Team Policy
🟢	Public-New Marketing	Deleted	Microsoft Team	Public	Public Short Term Te...
🟢	PublicMarketingEvents	Deleted	Microsoft Team	Private	Public Short Term Te...
🕒	Public-internal_project	Deleted	Microsoft 365 Group	Public	Private Team Policy
🕒	Public-internal_Project	Deleted	Microsoft Team	Public	Private Team Policy
🟢	Public-internal HR Proj	Deleted	Microsoft Team	Private	Public Team Policy
🟢	PublicHRUpdates	Deleted	Microsoft Team	Public	Public Team Policy
🟢	PublicHRCommunicati	Deleted	Microsoft Team	Private	Public Team Policy
🟢	PublicGroup-Example	Deleted	Microsoft 365 Group	Private	Public Team Policy

The right-hand pane shows 'View details: Q2 Outing' with tabs for 'Workspace details', 'Timeline', and 'Policy info'. The 'Workspace details' tab is active, showing 'User information' (Group/Team owners: Barriemore Barlow, Ray Hill; Primary Data Owner: Ray Hill; Secondary contact: Ian Anderson) and 'Advanced information' (Hub, Geo location, Storage limit (GB): 25600, Storage used (GB): 0.046, External sharing for site: New and existing external users, External sharing for group/team: On).



# ... and easily report on the full history of each workspace...

The screenshot displays the AVEPOINT Cloud Governance interface. The main area shows a 'Workspace report' table with columns for Phase, Name, Status, Type, URL, and Policy. The 'Q2 Outing' workspace is highlighted. To the right, a 'View details: Q2 Outing' panel shows a 'Timeline' of events, including task renewals and policy changes by administrators like Ray Hill and Ian Anderson.

Phase	Name	Status	Type	URL	Policy
🕒	random	Active	Microsoft Team	https://avepointatd...	-
✅	R&D Team Site	Deleted	Site Collection	https://avepointatd...	SC Intranet Policy
🕒	Quick Team Template	Active	Microsoft Team	https://avepointatd...	-
✅	Quarterly Conference	Archived	Microsoft Team	https://avepointatd...	Internal Group Te
📌	Q2 Outing	Active	Microsoft Team	https://avepointatd...	Guest Group Tea
🕒	publictoprivate	Active	Microsoft Team	https://avepointatd...	-
✅	Public-Team_ElPaso	Deleted	Microsoft Team	https://avepointatd...	Private Team Poli
✅	Public-ShoeDeal	Deleted	Microsoft Team	https://avepointatd...	Private Team Poli
✅	Public-SalesWestVAT	Deleted	Microsoft Team	https://avepointatd...	Private Team Poli
✅	PublicProductXYZ	Deleted	Microsoft Team	https://avepointatd...	Public Short Terr
⚠️	Public-PDT	Deleted	Microsoft 365 Group	https://avepointatd...	Private Team Poli
✅	Public-New Marketin...	Deleted	Microsoft Team	https://avepointatd...	Public Short Terr
✅	PublicMarketingEven...	Deleted	Microsoft Team	https://avepointatd...	Public Short Terr
🕒	Public-internal_project	Deleted	Microsoft 365 Group	https://avepointatd...	Private Team Poli
🕒	Public-internal_Project	Deleted	Microsoft Team	https://avepointatd...	Private Team Poli
✅	Public-Internal HR Pri...	Deleted	Microsoft Team	https://avepointatd...	Public Team Polic
✅	PublicHRUpdates	Deleted	Microsoft Team	https://avepointatd...	Public Team Polic

**View details: Q2 Outing**

Workspace details | **Timeline** | Policy info

Action type: All | Action within: 1 year

- 2024-07-01  
Next renewal: 2024-07-01
- 2021-09-13 (Today)  
There are no current pending tasks.
- 2021-08-26 15:42:25  
**Ray Hill** completed contact renewal.
- 2021-08-20 14:27:46  
Renewal task was assigned to: **Ray Hill**
- 2021-07-28 13:17:49  
Renewal process started.
- 2021-07-28 13:17:48  
Renewal process was restarted by **Ian Anderson**.
- 2021-07-28 13:10:21  
The policy of the workspace was changed by the administrator **Ian Anderson**.
- 2021-07-28 13:10:19  
**Ian Anderson** completed the renewal process.
- 2021-07-28 12:35:55  
Renewal process started.
- 2021-07-28 12:35:53  
Renewal process was restarted by **Ian Anderson**.
- 2021-07-21 10:08:21  
Renewal process started.
- 2021-07-21 10:08:20  
Renewal process was restarted by **Barriamore Barlow**.
- 2021-07-19 08:41:13  
Renewal process started.
- 2021-07-19 08:41:11



# ... and view all currently applied protections in place...

The screenshot displays the Microsoft Cloud Governance console. The main area shows a 'Workspace report' table with columns for Phase, Name, Status, Type, Privacy, and Policy. The 'Q2 Outing' report is highlighted. A side panel titled 'View details: Q2 Outing' is open, showing 'Policy info' for the report. The policy details include:

- Allow users to share the group/team site content with people outside the organization: New and existing external users
- Allow members to share the site and individual files and folders: Yes
- Allow members to invite others to the site members group: Yes
- Allow access requests: Yes
- Send access requests to: The site owners group
- Custom message shown on the access request page

Below the policy info, there are sections for 'Group/Team lifecycle management', 'Group/Team inactivity threshold management', and 'Group/Team lease management'. The 'Group/Team inactivity threshold management' section shows 'Enable group/team inactivity threshold' set to 3 years and 'Approval process' set to 'IA Approval'.

Phase	Name	Status	Type	Privacy	Policy
✓	R&D Team Site	Deleted	Site Collection		SC Intranet Policy
✓	Quarterly Conference	Archived	Microsoft Team	Public	Internal Group Team...
✓	Q2 Outing	Active	Microsoft Team	Private	Guest Group Team P...
⌚	publictoprivate	Active	Microsoft Team	Private	-
✓	Public_Team_ElPaso	Deleted	Microsoft Team	Public	Private Team Policy
✓	Public_ShoeDeal	Deleted	Microsoft Team	Public	Private Team Policy
✓	Public_SalesWestVAT	Deleted	Microsoft Team	Public	Private Team Policy
✓	PublicProductXYZ	Deleted	Microsoft Team	Private	Public Short Term Te...
⚠	Public-PDT	Deleted	Microsoft 365 Group	Public	Private Team Policy
✓	Public-New Marketing	Deleted	Microsoft Team	Public	Public Short Term Te...
✓	PublicMarketingEvents	Deleted	Microsoft Team	Private	Public Short Term Te...
⌚	Public-internal_project	Deleted	Microsoft 365 Group	Public	Private Team Policy
✓	Public-SalesWestVAT	Deleted	Microsoft Team	Public	Private Team Policy
✓	PublicProductXYZ	Deleted	Microsoft Team	Private	Public Short Term Te...
⚠	Public-PDT	Deleted	Microsoft 365 Group	Public	Private Team Policy
✓	Public-New Marketing	Deleted	Microsoft Team	Public	Public Short Term Te...
✓	PublicMarketingEvents	Deleted	Microsoft Team	Private	Public Short Term Te...
⌚	Public-internal_project	Deleted	Microsoft 365 Group	Public	Private Team Policy
⌚	Public-internal_Project	Deleted	Microsoft Team	Public	Private Team Policy
✓	Public-internal HR Proj	Deleted	Microsoft Team	Private	Public Team Policy
✓	PublicHRUpdates	Deleted	Microsoft Team	Public	Public Team Policy
✓	PublicHRCommunicati	Deleted	Microsoft Team	Private	Public Team Policy
✓	PublicGroupe-Example	Deleted	Microsoft 365 Group	Private	Public Team Policy



# Get a handle on your *content* as well!

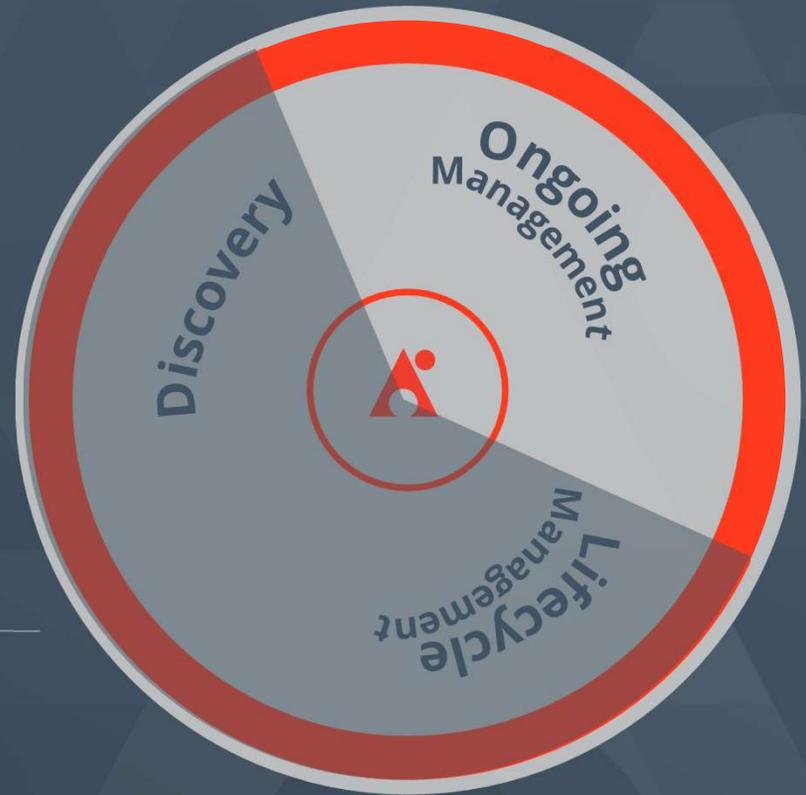
The screenshot displays the AvePoint Insights For Microsoft 365 dashboard. The interface includes a dark sidebar with navigation options: Dashboard, Overview, Microsoft Teams, SharePoint Online, OneDrive for Business, Microsoft 365 Group, Risk Analysis, Exposure, Search Users and Groups, Download Center, Settings, and Administration. The main content area is titled 'Dashboard / Overview' and features several key sections:

- Contributing Factors (Last 7 Days):** Three charts showing trends for External Users in Azure AD (8/12), External Links (19), and Sensitive Items (1.69K).
- Pinned Users/Groups (2):** A list of users including Ray Hill and Jay Hall.
- Overall Risk:** A text-based summary of risk calculations.
- External User Statistics:** Metrics for Groups with External Users (25), External Users with Access (13), and Signed in within Last 90 Days (2).
- Direct Access Sharing:** A table with columns for Shared With and Sensitive Items.
- External Users with Highest Risk:** A table with columns for Display Name and Sensitive Items.
- Trending:** A chart showing High Risk Items at 1.11K.
- Summary:** A grid of metrics for Microsoft Teams (233 Total Teams, 20 Teams with Guest Users, 23 Teams with High Risk Items), SharePoint Online (122 Total Site Collections, 2 Site Collections Shared with External Users, 17 Site Collections with High Risk Items), OneDrive for Business (41 Total OneDrive, 6 OneDrive Shared via Anonymous Link, 4 OneDrive Shared with External Users), and Microsoft 365 Group (1 Total Microsoft 365 Groups, 0 Microsoft 365 Groups with Guest Users, 0 Microsoft 365 Groups with High Risk Items).

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# Ongoing Management



# Determine What's Still Relevant

You will need to work with content owners to determine:

Is this content

- Relevant
- Up to date
- Cross-functional

Are permissions working as anticipated?



*Discovery is on-going since we're constantly creating new data.*



# How is the business using their content?

Knowing how content is used (during the collaboration process and after) can inform governance decisions and policy creation for ongoing content management

- Sharing considerations
- Sensitivity of data
- Retention requirements



# Automated Workspace Lifecycle and Recertification with Cloud Governance

- Manual or automated lifecycle triggers for collaborative workspaces
- Managed de-provisioning options that are “context aware” of sensitivity and compliance requirements

The screenshot displays the MyHub interface with a navigation bar at the top containing 'Home', 'Chat', and 'About'. Below the navigation bar are tabs for 'Start a request', 'To-do list', 'Workspaces', 'My tasks', and 'Requests'. A 'Cancel' button is visible above the main content area.

The main content area is divided into two panels. The left panel, titled 'Q2 Outing' with a timestamp of '2020-04-10 09:37:04', contains a notification box with the following text:

**As a data owner, you have responsibilities...**  
Your Office 365 Group/Team is due for renewal. Our corporate governance policy requires you to complete this renewal process and specify/confirm the appropriate governance information for your workspace. If you fail to complete this process, your Group or Team may be archived or deleted in accordance with policy.

The renewal process should take only a few minutes.

Are still the primary owner of this Group or Team and ready to begin the process?

At the bottom of the notification box, there is a status bar that reads 'Estimated time to complete: 5-10 minutes' and two buttons: 'Remind me later' and 'Start renewal'.

The right panel, titled 'Renewal overview', contains a message: 'You have been identified as the person responsible for the workspace renewal. Please complete the renewal task if you still take responsibility for this workspace. You may reassign the renewal task to another user if you no longer require it.'

Below the message is a section titled 'Ownership' which shows a red circular profile picture with the letter 'A' and the name 'ATSAAdmin' with 'N/A' below it.

At the bottom of the right panel is a section titled 'Member statistics' which shows a blue circular profile picture with a group icon and the text 'Total members 14'.



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

The screenshot shows the MyHub interface for a workspace renewal process. The top navigation bar includes 'MyHub Home Chat About' and a secondary bar with 'Start a request', 'To-do list', 'Workspaces', 'My tasks', and 'Requests'. A 'Create a workspace' button is visible in the top right. The main content area is titled 'Renewal overview' and features a 'Start renewal' button in the top right corner.

**As a data owner, you have responsibilities...**  
Your Office 365 Group/Team is due for renewal. Our corporate governance policy requires you to complete this renewal process and specify/confirm the appropriate governance information for your workspace. If you fail to complete this process, your Group or Team may be archived or deleted in accordance with policy.

The renewal process should take only a few minutes.

Are still the primary owner of this Group or Team and ready to begin the process?

Estimated time to complete: 5-10 minutes

Buttons: Remind me later, Start renewal

**Renewal overview**

**You have been identified as the person responsible for the workspace renewal.**

Please complete the renewal task if you still take responsibility for this workspace. You may reassign the renewal task if you are no longer responsible or request the workspace to be decommissioned if you no longer require it.

You have been identified as the person responsible for the workspace renewal.

**Ownership**

Owner	Name	Role
	ATSAdmin	N/A
	Tom Gawczynski	VP, Solution Engineering
	Alex Vaughn	Solution Engineer

**Member statistics**

Category	Count
Total members	14
External users	1



# Confirming data owners during renewal...

The screenshot displays the MvHub interface for a 'Contact renewal' process. The main window is titled 'Contact renewal' and shows a list of items to be renewed. On the left, a sidebar lists various categories: 'Renewal progress' (with a progress bar), 'Contact', 'Membership', 'SharePoint permissions', 'Sharing link', and 'Metadata'. The 'Contact' section is currently selected, showing a confirmation message: 'Confirm whether the current primary and secondary contact are still correct. If necessary, you can assign the contact role to others.'

The main area displays two contact cards under the heading 'Contact renewal':

- Tom Gawczynski**, VP, Solution Engineering, *Primary contact*
- Rita Brewer**, Project Manager, *Secondary contact*

An 'Update secondary contact' modal is open on the right. It features an 'Add user' input field and a section titled 'Or choose a contact from existing owners.' This section lists three users: Tom Gawczynski (Owner), ATSAAdmin (Owner), and Alex Vaughn (Owner). The Alex Vaughn entry is highlighted with a plus sign, indicating it is the selected option. At the bottom of the modal, there are 'Save' and 'Cancel' buttons. Below the modal, 'Back' and 'Continue' buttons are visible.



# Owners can easily review and adjust existing permissions for their workspaces...

Cancel

**Q2 Outing**  
2020-04-10 09:37:04

**Renewal progress**

Contact

Membership   
Review the workspace membership. If necessary, you can update the membership.

SharePoint permissions

Sharing link

Metadata

### Membership renewal

Add Remove Promote to owner Reset all 1 of 14 selected

User	Membership	Type	Last sign-in date
<b>MB</b> Murugan Balaji Sr. Solution Engineer	Member	Internal	2022-01-12
<b>SR</b> Stephanie Racine ATS	Member	Internal	2022-01-10
<b>AS</b> Antoine Snow ATS	Member	Internal	2021-12-16
<b>WG</b> Wojciech Gajda ATS	Member	Internal	2021-11-19
<b>AV</b> Alex Vaughn Solution Engineer	Owner	Internal	2021-11-11
<input checked="" type="checkbox"/> <b>EL</b> Eddie Lee ATS	Member	Internal	2021-05-05
<b>T</b> tomg.avepoint N/A	Member	External	None

Remove  
Promote to owner

Back Continue



# Owners can easily see and adjust members and owners who can access their Team...

Cancel

Q2 Outing  
2020-04-10 09:37:04

**Renewal progress**

Contact

Membership

**SharePoint permissions**   
Review the SharePoint site permissions for users and groups. If necessary, you can update the permissions.

Sharing link

Metadata

### SharePoint permissions

[View permissions](#) [Revoke guest access](#) [Reset all](#) 1 of 8 selected

Name ↑ ↓	Link	Users with access ↓	Risk level ↓
Q2 Outing	<a href="#">Link</a>	3	N/A
general	<a href="#">Link</a>	3	N/A
<input checked="" type="checkbox"/> Client Data Points-2.docx	<a href="#">Link</a>	3	High
contoso proof of concept ...	<a href="#">Link</a>	3	High
Contoso_PaymentAuthoriz...	<a href="#">Link</a>	3	High
Executive FY Goals.pptx	<a href="#">Link</a>	3	High
LoanApplication_TimL.docx	<a href="#">Link</a>	3	N/A

**Recommendation:**  
Remove all additional permissions except owners and members (Do it for me)

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# Owners review and confirm sharing links

**MyHub** Home Chat About

Start a request To-do list Workspaces My tasks Requests Hubs Create a workspace

Cancel

**Q2 Outing**  
2020-04-10 09:37:04

**Renewal progress**

- Contact
- Membership
- SharePoint permissions
- Sharing link   
Review the links that have been shared with users or groups. If necessary, you can remove the sharing links or update who gets access via the sharing link.
- Metadata

**Sharing link**

Reset all

Name	Shared date	Shared by	Link access
<input type="checkbox"/> Document.docx	2022-01-18 05:54	RH	Specific people (RH)

**Document.docx**  
N/A

Revoked access Reset all

Name	Type	Last sign-in date
<input type="checkbox"/> Murugan Balaji Sr. Solution Engineer	Internal	2022-03-27
<input checked="" type="checkbox"/> Ray Hill Director of Project Manag...	Internal	2022-03-28
<input type="checkbox"/> Tom Gawczynski VP, Solution Engineering	Internal	2022-03-23
<input type="checkbox"/> Tony Coppa	Internal	None

Back Continue



# Owners review and confirm the required metadata associated with their workspaces...

[Cancel](#)

 **Q2 Outing**  
2020-04-10 09:37:04

**Renewal progress**

Contact

Membership

SharePoint permissions

Sharing link

**Metadata**  
Confirm whether the applied metadata is still correct. If necessary, you can update the metadata values.

## Metadata renewal [Reset all](#)

**Business Purpose** ⓘ  
Departmental Collaboration

**Sensitivity Level \*** ⓘ  
Restricted

**Critical Business Application \*** ⓘ  
 Yes  
 No

**Region \***  
North America

**Country\_Code \*** ⓘ  
US

[Back](#) [Submit](#)



# How can we “trust but verify” owner actions with AvePoint?



- Aggregate access, sensitivity, and activity data
- Regulations and information types define risk
- Prioritize to easily expose issues – focus on what matters



- Security dashboards highlight anonymous links and exposed sensitive data
- Drill down on known and potential issues
- Fix as you go – edit permissions in batch



- Prevent configuration drift with automated policies
- Trigger alerts or roll-back of unauthorized changes
- Track improvements over time – prove your collaboration is secure!



New Cloud Management

Policy Management > Create Policy

### Create Policy

A policy allows you to monitor violations and changes using policy rules.

**General Information**

\* Object Type  
Microsoft Teams

\* Name  
 Copy from an existing policy  
 Create a new policy  
No more external sharing!

Description

**Rules**

**Other Settings**

\* Scan Interval  
1 Days

\* Retention Duration  
How many days would you like to retain the data associated with this policy?

Craft policies that can adapt to the way your teams work and block the most common risks in your Microsoft 365 environment!

### Add Rule to Microsoft Teams

Select a rule to add to the policy:

External Sharing Settings

Classification Protection

**External Sharing Settings**

Membership Restriction

Office 365 Group Visibility in Outlook Client

Ownership Restriction

Send e-mail notifications of the violations to the following users:

Include Microsoft Teams owners

Cancel Add to Policy



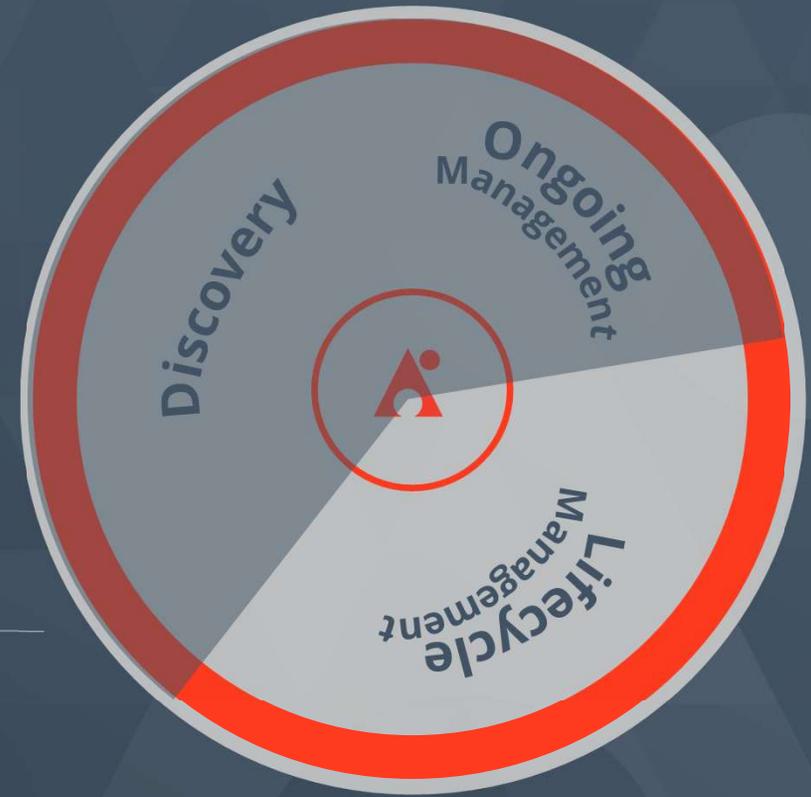
# Policies can vary even within a single M365 tenant...

The screenshot displays the Microsoft 365 Policies management interface for an 'Individual Service'. The left sidebar shows navigation options: Dashboard, Policies, Individual Service, Tenant, Tenants, Containers, Workspaces, Report, Job Monitor, and General Settings. The main area shows a grid of policy cards, each with a title, a brief description, and a table of metrics (Rules, Assigned Nodes, Violations). The 'Teams Name Enforcement' card is highlighted with a red circle.

Policy Name	Rules	Assigned Nodes	Violations
US PII	2	0	0
Membership restriction	1	0	0
FS-US Approved Access Only	1	23	23
<b>Teams Name Enforcement</b>	1	0	0
Deny Branch Office	2	0	0
Prevent All Access - Teams	2	0	0
External Share Control, Detect any rules	2	0	0
Data Protection	4	0	0
Content Sensitivity Control	5	0	0
Internal Project Policy	10	0	0
PS - OPM Teams Ethical Wall	1	0	0
Protect Privacy	7	0	0
PS - OIG Teams Ethical Wall	1	0	0
Atlantic Southeast Teams	1	0	0
Protect Restricted Teams	3	0	0



# Lifecycle



# Policies and Retention

## Considerations

- Should anyone be able to create Team?
  - Site?
- Should all Teams/Sites “live” forever?
  - What about documents?
- Should all content have the same retention policy? Probably not.
- Do we need an archive process?



# Planning for Later

## Archive – there must be a plan

- Where will archived content be stored?
  - SharePoint?
    - Consider the impact on search results
  - File share?
    - This means retaining an on-prem server to maintain
- How will users get to archived content if/when needed?
- How can we get something back that was deleted?
  - Permissions
  - Content



# What if the workspace is no longer needed?

The screenshot shows the MyHub interface with a sidebar on the left and a main content area on the right. The sidebar contains navigation options: Search in all services, Home, Workspaces, Requests, Quick requests, My hubs (with sub-options: Pinned hubs, Default hubs, Shared hubs, Saved hubs (7)), and Shared hubs (with sub-option: Saved hubs (7)). The main content area displays a dialog titled "Team renewal: Q2 Outing".

**Team renewal: Q2 Outing**

As a data owner, you have responsibilities...

Your Microsoft Team is due for renewal. Our corporate governance policy requires you to complete this renewal process and specify/confirm the appropriate governance information for your Team.

If you're no longer interested in keeping this Group or Team you can select "No, I want to delete it" you will remove the Group or Team for future use. If you're not sure what this renewal is for, please select "No, and I don't know who is responsible for the renewal process"

The renewal process should only take a few minutes.

Are you ready to begin?

Yes, and I will complete the renewal process

Is this Microsoft Team still required?

Yes, I want to keep it

No, I want to:

- Delete this team
- Archive this team

No, and I don't know who is responsible for the renewal process

At the bottom right, there are two buttons: "Cancel" and "Confirm". A mouse cursor is pointing at the "Confirm" button.

# AvePoint managed de-provisioning of O365 Workspaces

## Group/Team Lease Management

Choose whether to enable a lease period for the Office 365 Group/Microsoft Team. A lease period is the amount of time the group/team is available for use. With this option enabled, a lease expiration task will be assigned to approvers specified in the selected approval process asking if they would like to extend the lease or delete the group/team. You can also enable lease expiration warning to remind the approvers of the lease expiration in advance, and/or enable automatic deletion of the group/team when the lease expires.

Note: If you enable automatic deletion of the group/team and enable the notification upon the deletion, apart from specifying users as the e-mail notification recipients, you can also enter \$ to select from the following options:

[View Available Roles >](#)

Enable group/team lease management

\*Generate a group/team lease expiration task after a lease period of   or when the last lease extension expires

\*Approval Process:

[Create New](#)

[Create From This Existing Approval Process](#)

\*Stage one:

Assign To:

\$Primary Group Contact; \$Secondary Group Contact

Order:

All at once (parallel)

Allow the approval stage to complete when one approver approves

Allow approvers to reassign tasks to others

Enable group/team lease expiration warning

Enable automatic deletion of the group/team

\*Automatically delete the group/team when the lease has expired for

Enable a reminder for the approvers before the group/team deletion task is generated

\*Reminder profile:

[Create New](#)

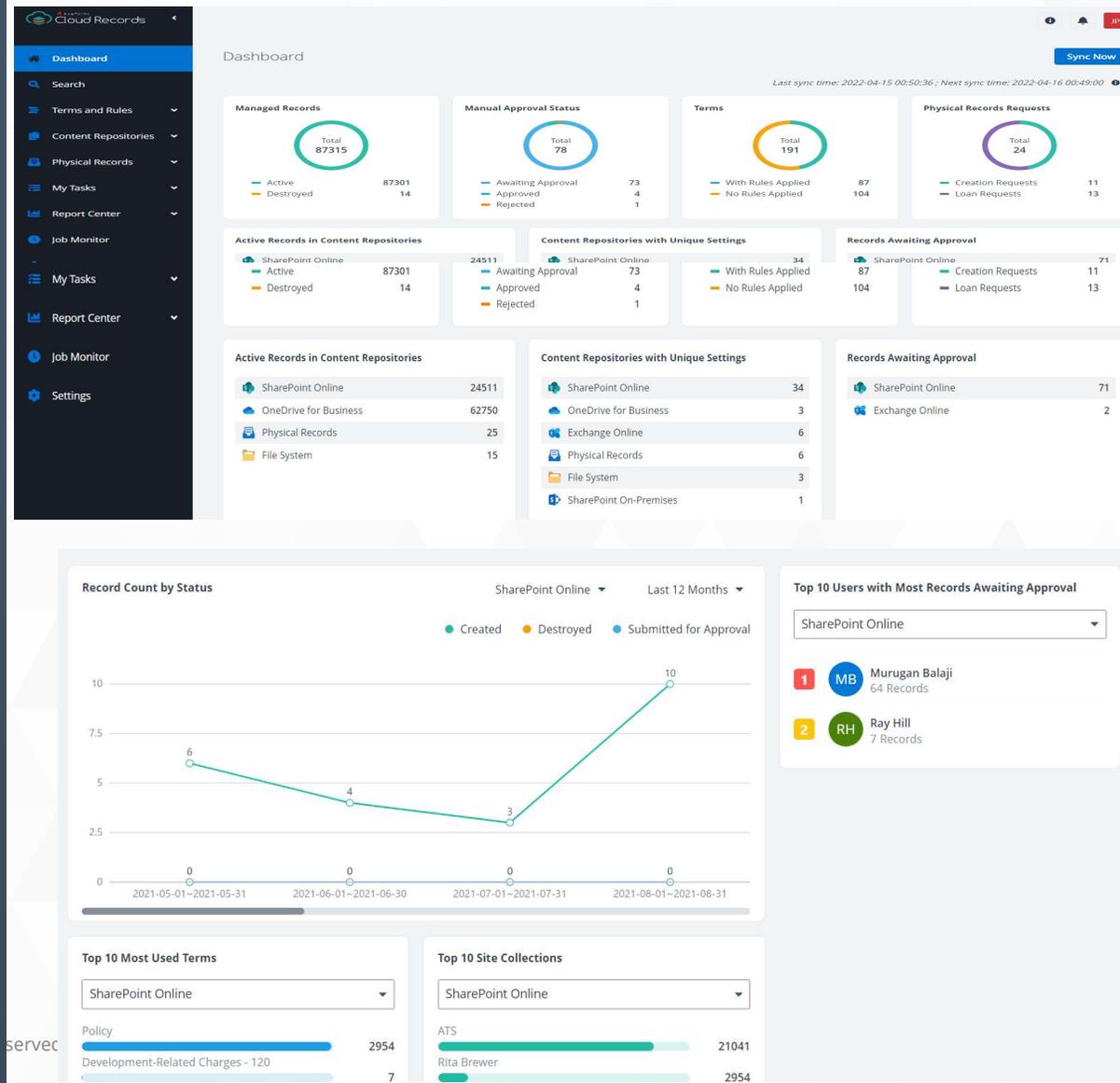
Notify the following people upon the deletion of the group/team

\*



# Go-forward Information Management and ERM Strategies with AvePoint Records

- “Set and forget” application of RM policies to existing and new content repositories
- Truly hierarchical file plan capabilities and dynamic disposition review workflows can support the complexity of Federal RM schedules in a sustainable way
- True content and metadata immutability protects the integrity of your records



# Proactive, hierarchical application of RM rules and settings ensures management of records from the day content is created, *even in newly created repositories*

The screenshot displays the AvePoint Cloud Records management console. On the left is a dark navigation sidebar with options like Dashboard, Search, Terms and Rules, Content Repositories, SharePoint Online, OneDrive for Business, Exchange Online, Physical Records, File System, SharePoint On-Premises, Physical Records, My Tasks, Report Center, Job Monitor, and Settings. The main content area is titled 'SharePoint Online' and features several action buttons: 'Apply Settings', 'Run Enforce Rule Actions Job', 'Unique ID Settings', and 'Import Content Repository Settings'. The 'Repository Tree' on the left lists various sites, with 'ATS O365 Groups' selected. The right-hand 'Settings' panel is open for 'ATS O365 Groups' and shows the 'Column Settings' section. This section includes a table for 'Classification Column Name' (Records Classification), a 'Description' field, and checkboxes for 'Require Column Value' (No), 'Display the Unique ID Column in SharePoint' (No), and 'Enable Related Records' (No). Below this are sections for 'Document Level Term Settings', 'Container Level Term Settings', 'Manual Approval Settings', and 'Enforce Rule Actions Job Schedule'. An orange callout box in the top right of the interface reads: 'Application of specific ERM settings, disposal approvals, etc. based on logical container'. A small red logo is visible in the bottom right corner of the interface.

Application of specific ERM settings, disposal approvals, etc. based on logical container

Classification Column Name	Records Classification
	Records Classification

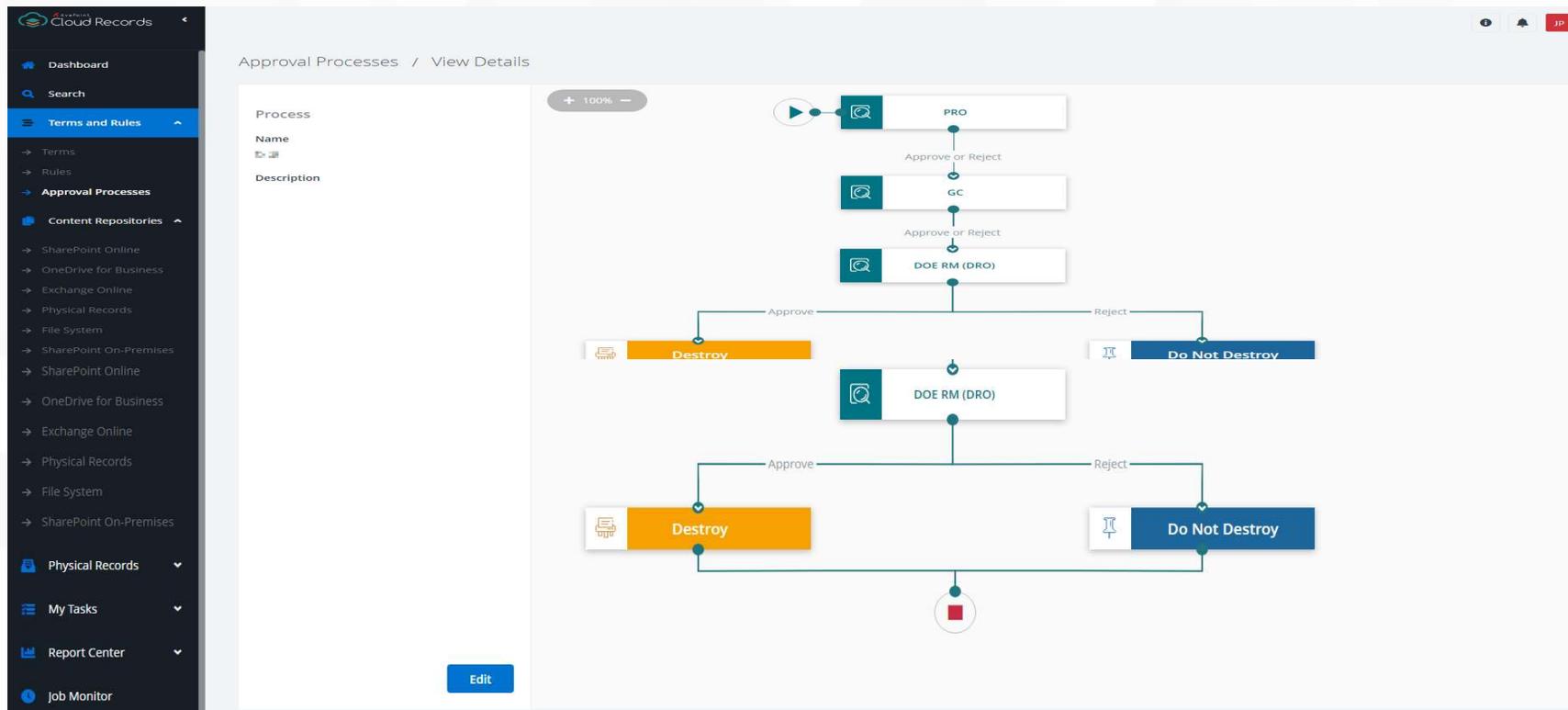
Require Column Value	No
Display the Unique ID Column in SharePoint	No
Enable Related Records	No

# RM retention and disposition rules can be set any level of the file plan taxonomy, ensuring efficiency when managing large records schedules

The screenshot displays the AverePoint Cloud Records interface. On the left is a dark navigation sidebar with the following menu items: Dashboard, Search, Terms and Rules (highlighted), Terms, Rules, Approval Processes, Content Repositories (with a sub-menu: SharePoint Online, OneDrive for Business, Exchange Online, Physical Records, File System, SharePoint On-Premises), and Physical Records. The main content area is titled 'Terms' and includes buttons for 'Synchronise', 'Export Terms with Rules', and 'Import'. Below these is a search bar and a tree view of terms. The 'Conferences & Events (Inaugural)' term is selected and highlighted. The right-hand 'Settings' panel for this term shows an information message: 'This term inherits settings from its parent term. To change these settings, click [Break Inheritance](#).' Below this, the 'Description' field is empty. The 'Rules' section contains one rule: '1 Document/Email COMMUNITY RE...' with icons for adding, viewing, and deleting rules. The 'Retention Setting' section has a toggle switch labeled 'Do not allow users to manually delete content classified with this term' which is currently turned off.



# Manual review workflow designer allows modification to review flow without the need for edits to or duplication of records labels



# Manage the full lifecycle of Guest Users

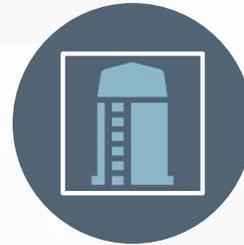


# It Is a Brave New World.

## Things Will Be Different



IT can't do it alone. We must engage with the business



Those old-fashioned silos don't work anymore (if they ever did).



By understanding how the business works, partnering with them, we can create workable solutions

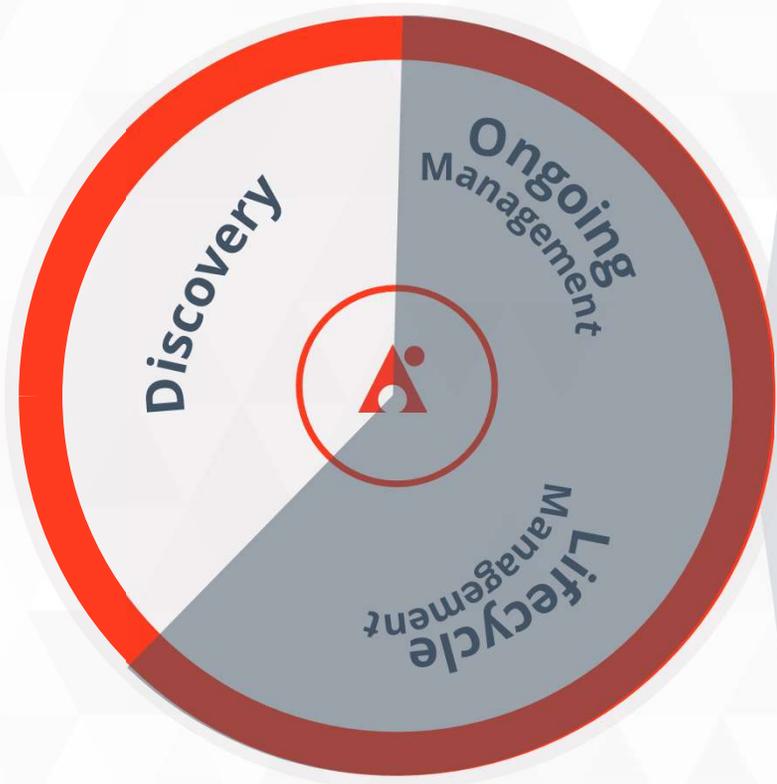


It helps to have a partner. Out of the box doesn't always meet the needs we have for monitoring, automation, backups...



# Discovery

*Understand and Clean Up Your Environment*



- Create a workspace catalog
- Establish data ownership
- Visibility thru activity, auditing, and external user reporting

# Ongoing Management

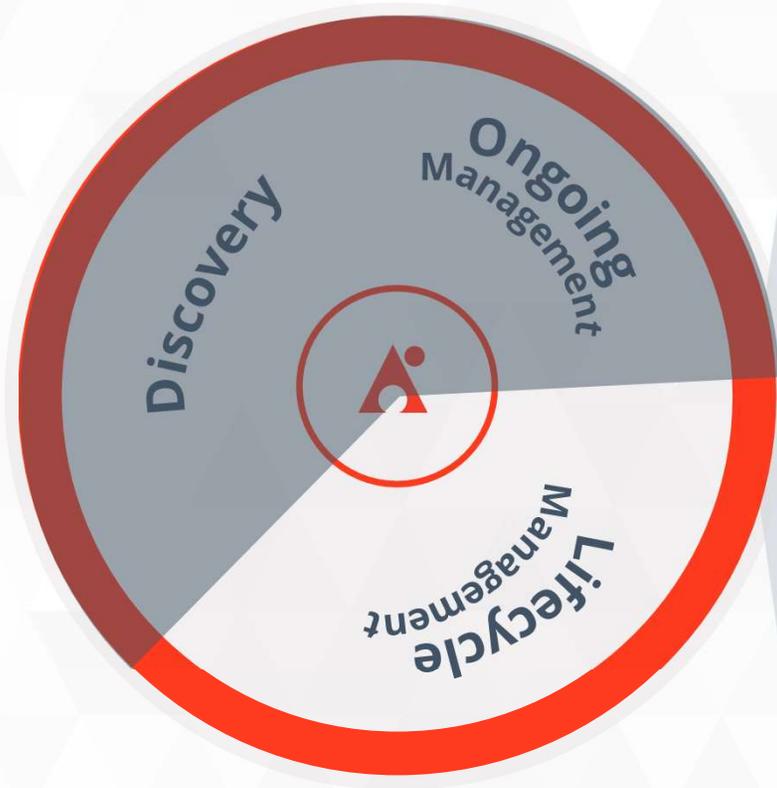
*A Sustainable Path Forward*



- Management of external sharing and guest users
- Securing sensitive data
- Proper metadata kept as a Team changes

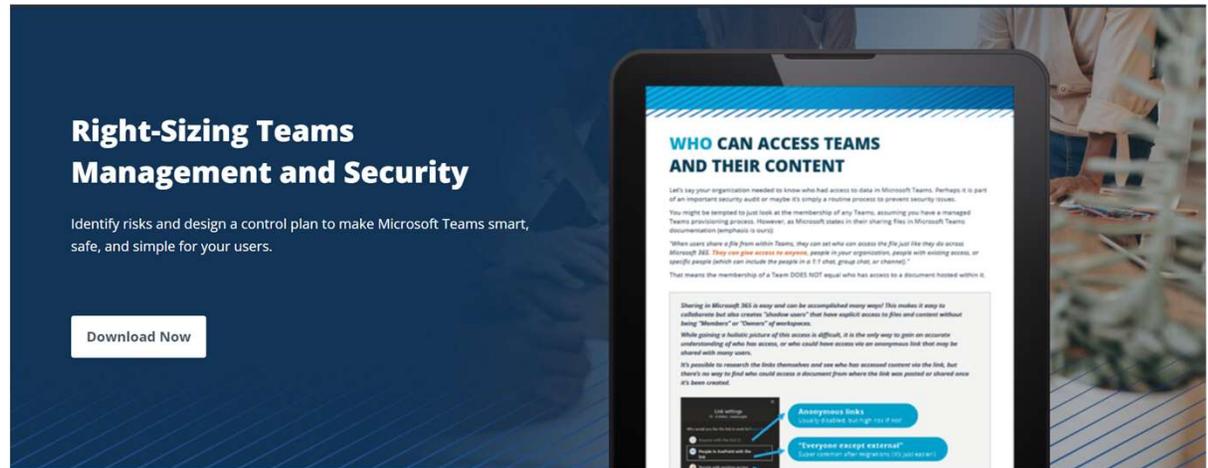
# Lifecycle Management

*Reduce Your Workload with good beginning and end of life practices*



- Structured, self-service workspace provisioning
- Continuous workspace renewal by owner
- Automated end-of-life practices

# Q&A



## Download eBook today

In this eBook you will discover:

- What kinds of information exists in Teams?
- Where does our sensitive data live?
- Who can access the data (internal and external parties)?
- Did they access it? And if so, what?
- How are we enforcing Microsoft Teams security policies?

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in



AvePoint®

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

ขอบคุณครับ

Dziękuję

谢谢

Tack

Mulțumesc

спасибо

Merci

תודה

多謝晒

дядкую

Ďakujem

धन्यवाद