Practical

INFORMATION LIFECYCLE MANAGEMENT

in Microsoft 365   with Renu Hall

Access Sciences

Renu Hall

Director, Technology,

Access Sciences Corporation

Consulting Services
- Information Governance
- Technology Enablement
- Business Strategy
- Business Process Outsourcing

❖ Assessment, Procurement, Implementation, and Operation of Information Systems

❖ Usability/UX, Governance

Access Sciences

M365 Information Lifecycle Management

Organizations need to apply information governance in M365

90% of organizations use M365 for collaboration

M365 contains information that needs to be protected and governed

Cannot rely on end users to classify and move to other Systems of Record

Everything created by users in M365 lives forever, by default
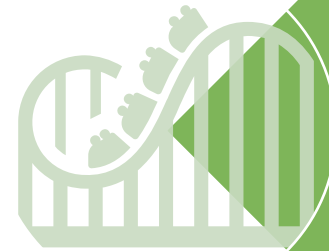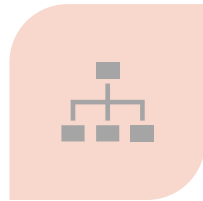
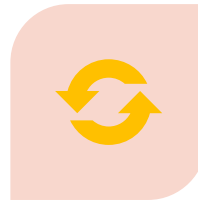Capabilities differ by version, constantly changing

Access Sciences

The Inconvenient Truth

Information Architecture is essential

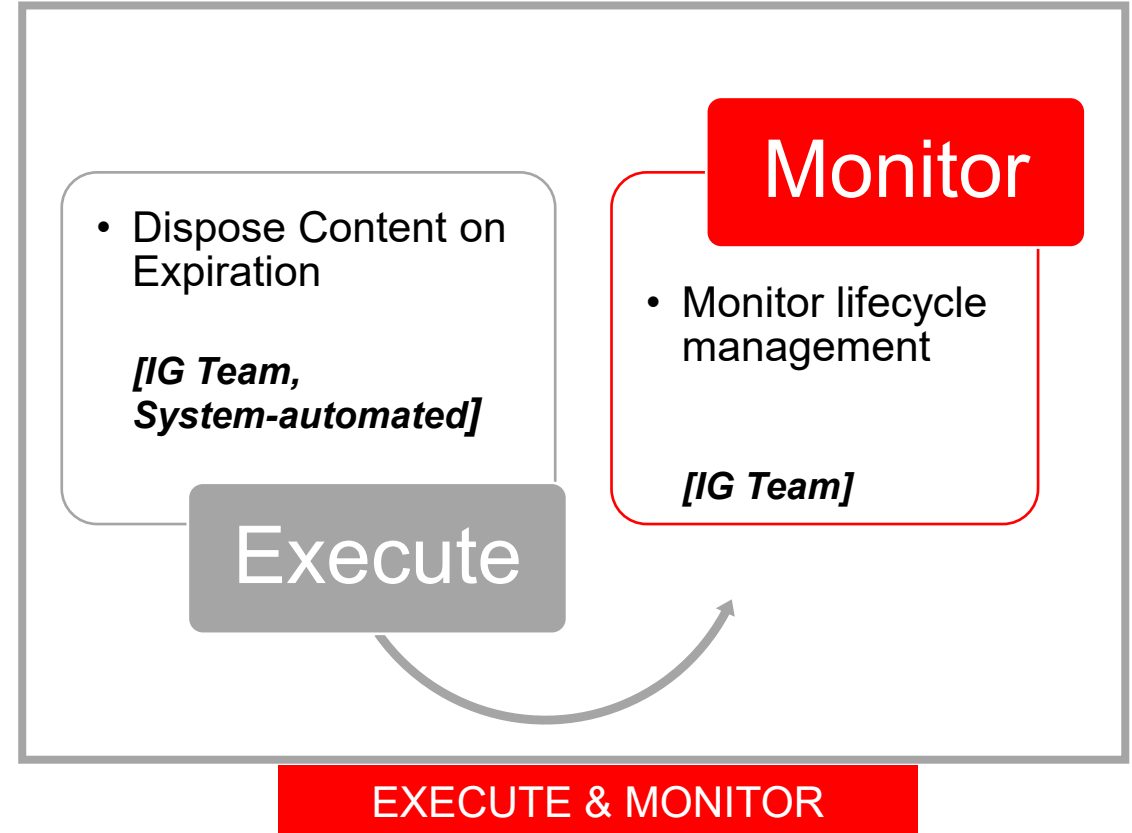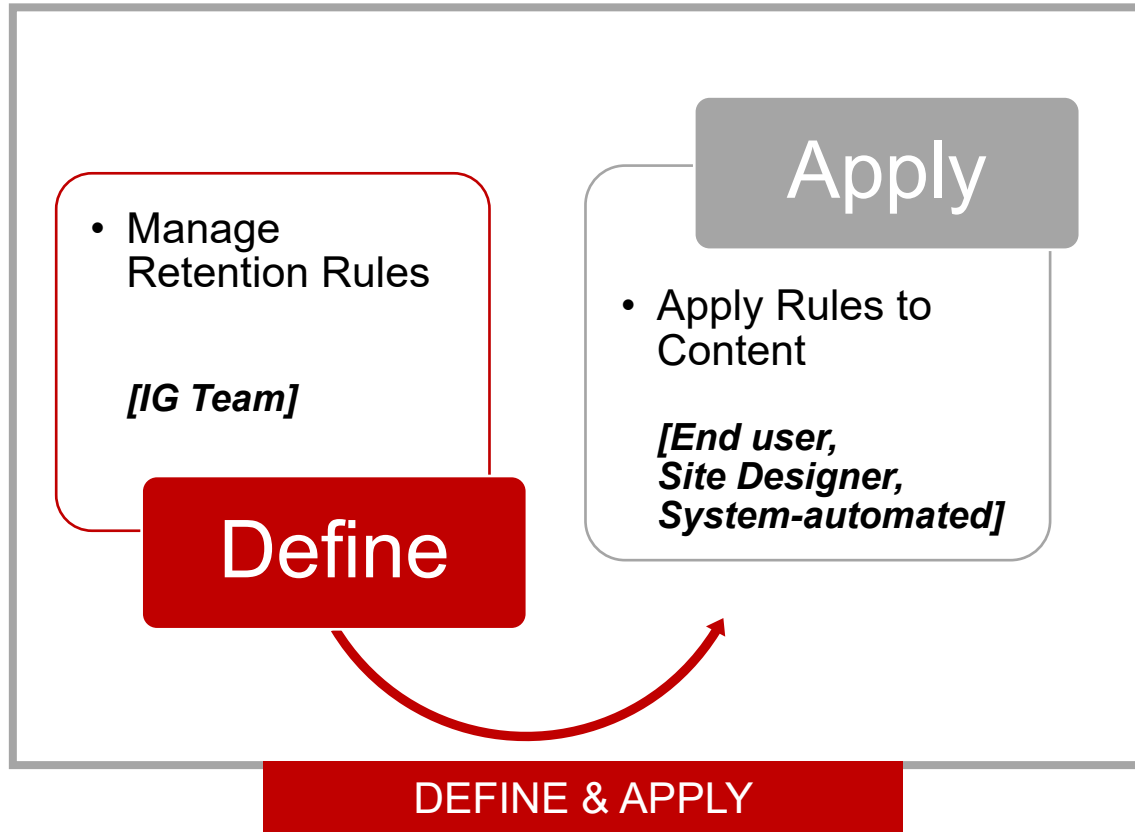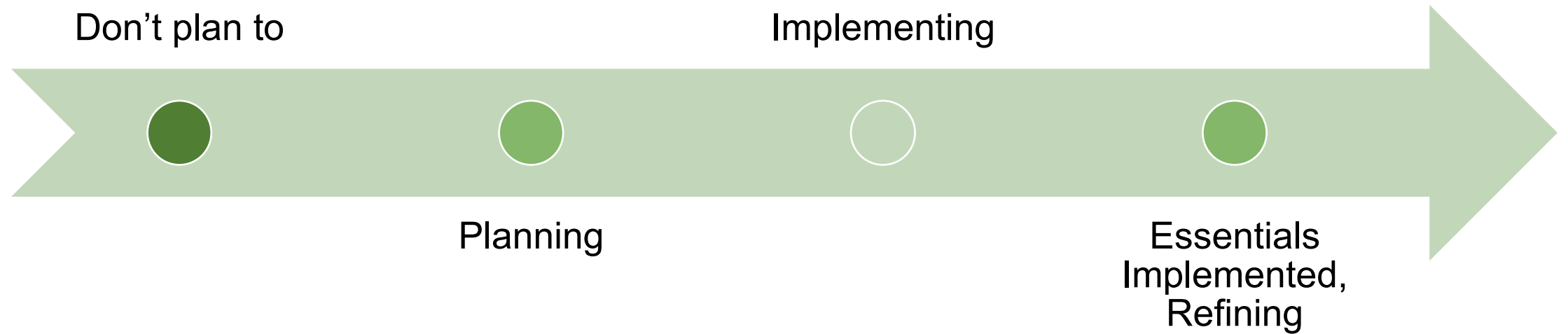| IT STRATEGY & LANDSCAPE | ENTERPRISE TAXONOMY | RETENTION SCHEDULE | SECURITY MODEL | AWARENESS |

Access Sciences

Agenda

Current Capabilities

Demo

Q&A

Access Sciences

Current Capabilities

DEFINE & APPLY

Define
- Manage Retention Rules

  [IG Team]

Apply
- Apply Rules to Content

  [End user, Site Designer, System-automated]

EXECUTE & MONITOR

Execute
- Dispose Content on Expiration

  [IG Team, System-automated]

Monitor
- Monitor lifecycle management

  [IG Team]

Access Sciences

Lifecycle Management in M365?

Don't plan to

Implementing

Planning

Essentials
Implemented,
Refining

Menti.com
92 79 50 8

Access Sciences

Your current M365 Solution

E3/G3

E3/G3 with Compliance

E3/G3 + 3rd Party IG solution

E5/G5

E5/G5 + 3rd Party IG solution

Other / Don't know
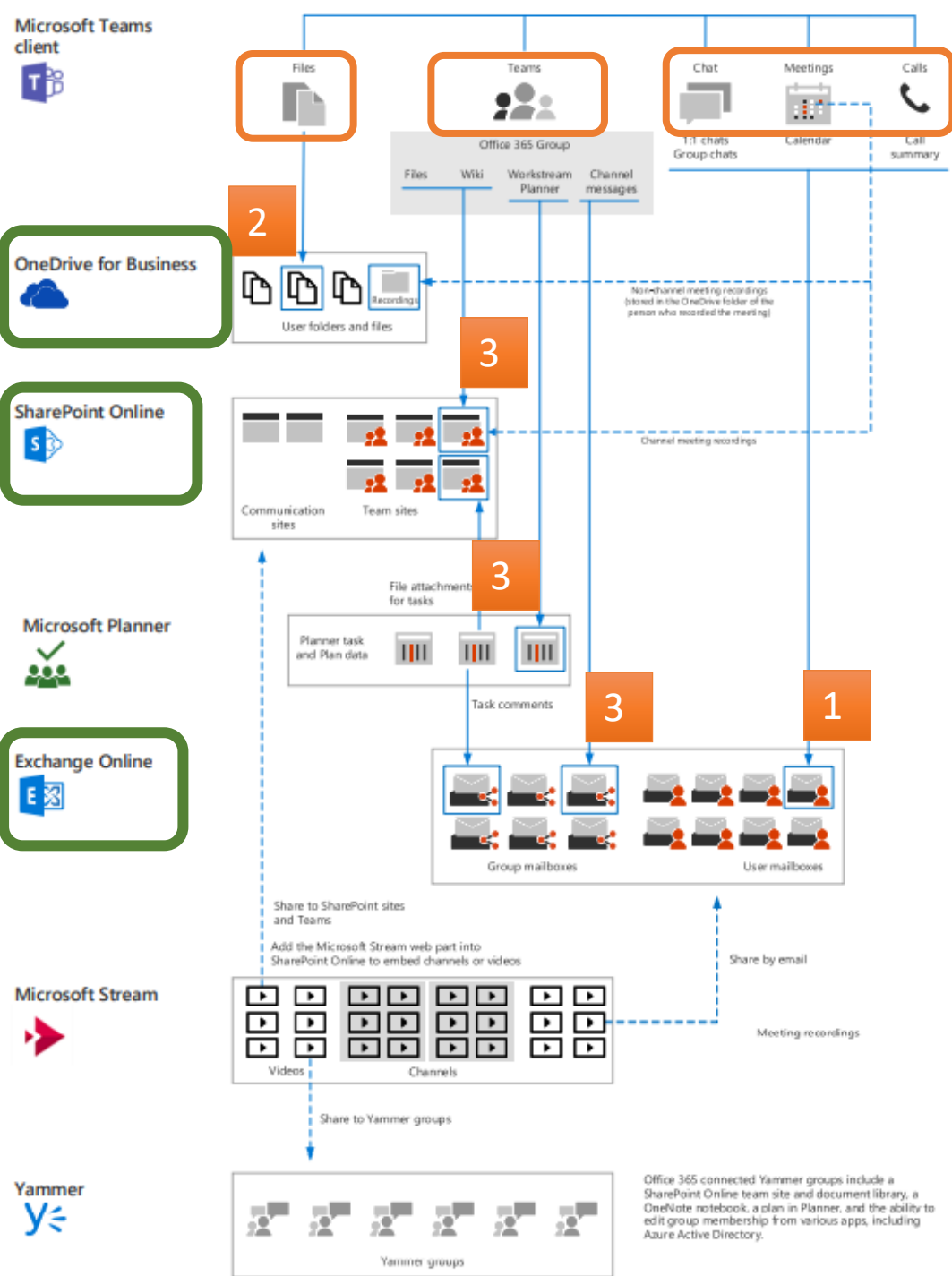
Menti.com
92 79 50 8

Access Sciences

Define & Apply

Big Picture for M365 Content

Define & Apply Retention Mechanisms
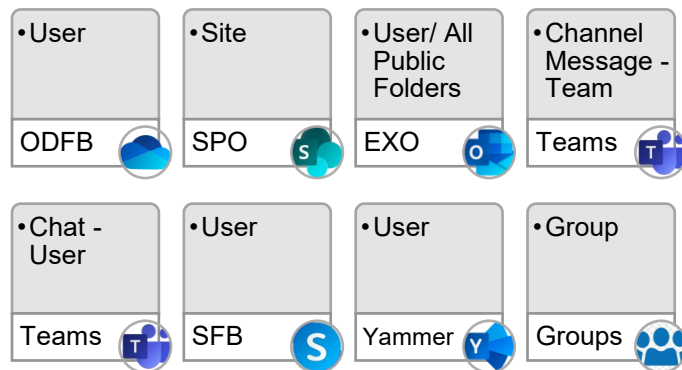
RETENTION POLICIES

Content Type IM Policies

OR

Retention Labels

May use retention policies in ADDITION to Labels or IM Policies.
System will pick longest retention period, earliest deletion date

Access Sciences

Define & Apply Retention Policies

- Options
  - Retain for a period,
  - Delete after a period, or
  - Retain & Delete
- Dates
  - Created, Modified
- Scope

•User ODFB	•Site SPO
•User/ All Public Folders EXO	•Channel Message - Team Teams
•Chat - User Teams	•User SFB
•User Yammer	•Group Groups

Apply
  Compliance Center – Information
  Governance – Retention Policies

Notes
  No further refinement
  No disposition review
  1 day to apply the policy
  Not visible to end users

Broad retention by category

Access Sciences

Define & Apply Content Type IM Policies

- Options
  - Retain for a period
  - Delete after a period
  - Multi-stage retention
- Dates
  - Created
  - Modified
  - Any CT date property (event)
- Non-records, records
- Recurrence of actions
- Hierarchical
- Scope
  - Lists/ Libraries with CTs

  SPO

Apply
  Associate CTs with libraries and lists in SPO at design time.

Notes
  Visible to end users (Compliance)
  Need Custom Disposition Report

Granular retention in SPO for E3/G3
Migration path to convert CT IM Policies to Labels

Access Sciences

Define & Apply Retention Labels

- Options
  - Retain for a period, or forever
  - Delete after a period
  - Retain & Delete with option of Disposition Review
  - Do nothing (just classify)
- Dates
  - Created, Modified, Labeled (event)
  - Event Type (E5/G5 or custom)
- Non-records, records, regulatory records
- Scope

•User	•Site	•User	•Group
ODFB	SPO	EXO	Groups
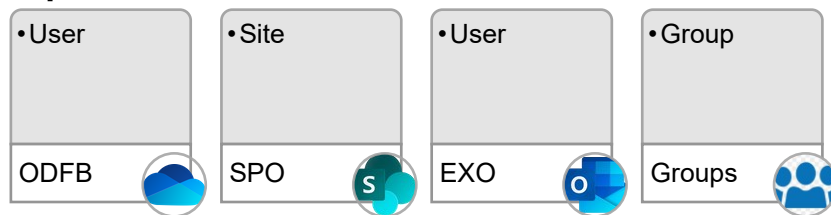
Apply
Label Policies: published to locations for selection (1 day) OR
Auto-applied (E5/G5) – keywords, sensitive information, trainable classifier (7 days)

Note
Disposition Review (delete, extend, relabel)
Visible to end users as 'Retention Label' field,
'Item is a Record', etc.
Flat – every stage is a new label
Delays in applying

Granular retention with broad scope

Access Sciences

Summary

Scope	Location	Applying lifecycle management
Email		Retention Policy – EXO (e.g., 90 days) Retention Labels
Personal files		Retention Policy – ODFB (e.g., 90 days) Retention Labels
SharePoint sites – content in lists and libraries		Retention Policy – SPO Retention Labels or Content Type IM Policies
Teams - Private/Group Conversation – Chat Messages		Retention Policy – Teams Chat (e.g., 90 days)
Teams – Private/Group Conversation – Calls, Meeting summary		Retention Policy – EXO User mailboxes (e.g., 180 days)
Teams - Private/Group Conversation – User Shared Files & Meeting Video Recordings		Retention Policy – ODFB (e.g., 90 days)
Teams – Team Channel Chat Messages		Retention Policy - Teams Channel Chat (e.g., 180 days) Retention Labels (GRP)
Teams – Team Calls, Channel Meeting Summaries		Retention Policy – EXO User mailboxes (e.g., 180 days) O365 Group Expiration Policy (Azure P1) – defined periods
Teams- Team Shared Files, Teams Channel Meeting Video Recordings		Retention Policy – SPO Retention Labels or Content Type IM Policies

Access Sciences

Retention Labels – Things to note

Flat structure – Use label naming conventions and organize

Use File Import

Multi-stage = Multi-label

Consolidate into big buckets (100-200)

One permission to edit

Name policies with Label, Scope and Type of Policy

Up to 1 day to publish, 7 days to auto-apply

Access Sciences

Execute & Monitor

Compliance Center

DISPOSITION
REVIEW
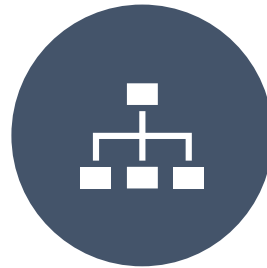
DATA
CLASSIFICATION

CONTENT SEARCH

AUDIT LOG SEARCH

EXECUTE

MONITOR

Access Sciences

Disposition Review

REVIEWERS RECEIVE EMAIL WITH LINK TO REPORT

SELECT LABEL TO SEE PENDING DISPOSITION

PROCESS ITEMS

PROOF OF DISPOSITION

Access Sciences

Disposition Process – Things to Note

Single level Disposition Review

Single permission level to access all labels

One label at a time review

Proof of Disposition Report is per label and date range

Access Sciences

Demo

Define Retention Rules

Apply Retention

Execute Disposition

Monitor

Future Capabilities

Summary

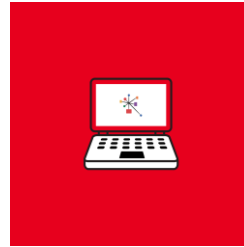Understanding of capabilities, roadmap

Knowledge of challenges and workarounds

More on Microsoft 365

PODCASTS

- Microsoft Teams with Renu Hall
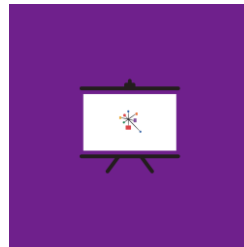- Delivering Microsoft Teams Training with Wey Tan

BLOGS

- Automation & Chatbots for Microsoft Teams
- Information Security in Microsoft Office 365
- How To Manage Your SharePoint Storage Limits

CASE STUDIES

- The Convention Center's eRecords Journey to the Cloud
- Records Management in SharePoint Online Achieves Corporate Compliance

WEBINARS

- Practical Governance for Microsoft Teams
- Executives Reveal the 3 Cs of Microsoft Teams
- Delivering Microsoft Teams Training at Scale

Access Sciences

References:
Microsoft Information Governance in Microsoft 365 - Microsoft 365 Compliance | Microsoft Docs
Records Management in Microsoft 365 - Microsoft 365 Compliance | Microsoft Docs
Retention in SharePoint Online: the WHAT | by Joanne Klein | REgarding 365

Questions

- **What code should I use to gain CEU credits?**
  - ARMAIGP2021_00020

- **Have suggestions for future topics?**
  - Go to Menti:

Menti.com
92 79 50 8

Access Sciences

Thank You! www.AccessSciences.com | (800) 242-2005 | info@AccessSciences.com

Renu Hall | rhall@accesssciences.com

Audience Poll Results

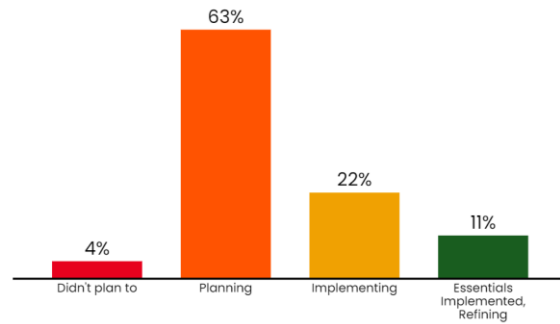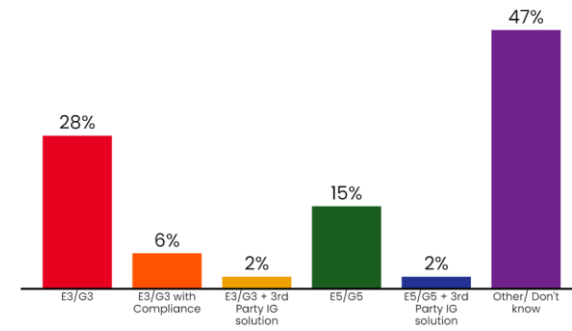

Lifecycle management in M365?

Category	Percentage
Didn't plan to	4%
Planning	63%
Implementing	22%
Essentials Implemented, Refining	11%

Your current M365 solution

Category	Percentage
E3/G3	28%
E3/G3 with Compliance	6%
E3/G3 + 3rd Party IG solution	2%
E5/G5	15%
E5/G5 + 3rd Party IG solution	2%
Other/ Don't know	47%