

Microsoft 365

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Stop, Stop, Go

Handling Sensitive Information in Microsoft Teams Without Disrupting Collaboration

Session

Recording: https://www.youtube.com/watch?v=_z_AM9CPU8Q&feature=youtu.be

Stop, Stop, Go

Handling Sensitive Information in Microsoft Teams Without Disrupting Collaboration



Vanessa Williams

Indiana Office of Technology
Cloud Architect

 /in/vworksmart365



Miknon Go

AvePoint Public Sector
Senior Director, Strategic Advisors

 /in/miknon/



Today's Agenda

- Background
- The Challenge
- Solution



Background

Indiana Office of Technology

- Established by statute in 2005 to consolidate IT services for state agencies (Executive Branch)
- Provides cost-effective, secure, consistent, reliable enterprise-technology services
- Focus on Core Services Delivery, Cost Competitiveness, Executive Branch Security Readiness and Preferred Workplace
- Over 400 employees and contractors
- Central IT that also co-exists with our customer's IT

Indiana Department of Revenue

DOR's more than 700 dedicated team members administer over 65 different tax types and annually process nearly \$21 billion of tax revenue including:

- Processing millions of tax returns
- Handling pieces of correspondence and phone calls for hundreds of thousands of Hoosiers
- Completing thousands of diverse audits
- Addressing tax protest and legal issues
- Working in-person with individuals, business owners, tax preparers and a variety of stakeholders

Microsoft 365 Environment

- Single M365 production tenant for the whole state
- Shared by over 100 state agencies (DOR being one of the agency)
- IOT offers a standard set of services and configuration to all the agencies – One size fits none.
- Any requirements that individual agencies have above and beyond the standard configuration will be responsibility of each agency
- All tenant and service administration tasks performed by IOT



The Challenge

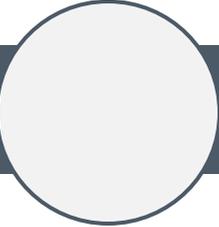
FTI Content



- What is it?

- PII Content
- Provided by IRS
- Any content derived from this

FTI Content



- Rules and Regulations

- Audit Requirements
- Chain of Custody
- Security Encryption
- Security and Access Governance/Control
- End of life management
- Hardware Requirement

Current State of Collaboration

- Cannot use M365 for FTI contents
- Teams is not being used much
- Jabber used for IM
- Only way to collaborate on FTI contents is through secure email, phone conversation or face to face meetings

Why DOR needs more control...

- Under the current IOT processes:
 - FTI and PII contents can be anywhere
 - External guests can be added to any Teams
 - Documents can be shared with anyone outside the agency, and even outside the state (in Teams and OneDrive)
 - Teams can be set to “public” and all contents visible to anyone in the state
 - Teams and documents can be deleted without review or approval
 - Much longer than necessary access to FTI and PII content is not uncommon
 - Provisioning a new Team is a multi-step process which relies on the requestor to take manual steps to create, enable and configure the Team



Solution

Governance is
about....

Making it easy to
do the right thing

Specify rules of engagement

Focus on business scenarios or initiatives

Enforce & automate governance



Breaking down your governance thinking...

IT Governance

(Broad, organization-wide)

Operational Governance

(Application-specific, aligns with IT Governance goals)

Workspace
Provisioning

Ongoing
Management
/
Enforcement

Lifecycle and
EOL for
Workspaces

Retention/
Expiration

Records
Mgmt

Classification

DLP

Data Governance

(Content-specific, aligns with IT Governance goals)

What do I need to govern?



For collaborative workspaces, DOR want to govern:

How are Teams
requested, approved
and created

Provisioning

How are availability,
compliance and
changes over time are
managed

Management

How do I
retain/expire/dispose of
Teams as appropriate

Lifecycle

When more is needed...

- DOR Example: Requirements beyond native O365 capabilities
 - Predefined Team types based on sensitivity, access and usage
 - Varying levels of governance control (not one size fits all)
 - Confidential (PII/FTI) Team – Cannot share documents outside of Team, cannot delete documents, more frequent membership review
 - External Team – Only Team allowed to invite external guests, more frequent membership review
 - OneDrive – Cannot share documents to anyone outside the state
 - Automated self service Teams and SharePoint Site request
 - Custom request approval process for each department and depending on risk profile of the Team
 - Cannot delete Team & Channel, and change Team settings
 - Process to prompt Team owners to review membership and necessity of Team on a regular basis
 - Scan environment to ensure that confidential and sensitive information is in the appropriate location (i.e. not in chat or non-sensitive teams)

Type of Team

By Sensitivity

Confidential
(FTI/PII)

Sensitive

Non-Sensitive

By Access

DOR Only

State

External

By Usage

Business Unit

Operational

Project

Community of Users

Unique Controls by Team Type

- Guest access is only enabled for External Teams
- Document sharing and deletion is disabled for Confidential Teams
- All State and External Teams needs to be reviewed every 3 months
- All DOR-Confidential Teams needs to be reviewed every 6 months
- All other DOR Teams needs to be reviewed every year
- Inactivity is set for 90 days for DOR Teams, 30 days for the rest
- Approval requirements different by Team Type and Department

Key DOR needs



Cloud Governance

Search in all services

Home

Workspaces

Requests

Quick requests

- Create Private Team
- New Workspace R...
- Create Private Sha...
- View all

New request > Create Private Team

Step 1. Request information | Step 2. Basic settings | Step 3. Advanced settings

Request summary *

Request for Q365 Team

Notes to approvers

Business Enablement Templates

Create a team from scratch

Create a team from template

Select one

Select one

- Board Meeting
- Clinical Trial
- Employee Onboarding
- Performance Review
- Quarterly Conference
- Retail Store Construction
- Software Development
- Template Sales Team

Project Mgmt Design

Provisioning

- Automated, self-service process for individual users
- Pre-defined Teams types based on sensitivity and levels of governance
- Custom approval processes
- Enforceable naming conventions and multiple owners

Key DOR needs



Team renewal: Q2 Outing

Renewal steps	Add owner	Add member	Reset		
✔ Contact renewal Confirm that the primary and secondary contacts are still correct. If necessary, you can assign the roles to other users.	Username ↑	User role	Change action	Access type ↓	
	Barriemore Barlow	Owner		● Internal	
	Ian Anderson	Owner		● Internal	
	Ray Hill	Owner		● Internal	
	Ray Hill	Member		● Internal	
	Tom Gawczynski	Member		● External	
	murugan.balaji	Member		● External	

Ongoing Management

- Enforce owners to periodically review Teams membership
- Enforce owners to periodically review necessity of Teams
- Isolate Guest Access only to approved area
- Disallow sharing and deletion of contents in high risk areas

Key DOR needs



View details: Office 365 Group/Microsof...



Reassign Continue access Delete Archive Team

Title	Office 365 Group/Microsoft Team projectteambravo_US Has Been Inactive For 3Year(s)
Notes to approvers	This request is created by the System.
Group/Team	projectteambravo_US
Owner	Ian Anderson Barriemore Barlow
Primary contact	Ian Anderson
Secondary contact	Ray Hill
Inactivity threshold date	2023-05-13 13:15:38
Requester	Auto-generated task
Modified	2020-05-17 12:39:53
Comments	

Expiration, End of Life

- Enforce approval process in order to delete and archive Teams
- If a Team is archived, automatically remove existing members/owners

Key DOR needs



Incident Manager > Benjamin_Johnson_LoanApplication.docx

FILTER BY Scan Time: 2019-10-15 16:20:36 Test Suite: SSN and Credit Card Version History: v1.0 (current)

Resolve Dismiss Escalate Reopen Take Action Mark as false positive Download Live Preview

Summary Scan Details Taken Actions View Properties Issue Highlight Report Auditor Permissions Comments History

INCIDENT SUMMARY

Original Location: https://avepointats-my.sharepoint.com/personal/rita_brewer_avepointats_com/Documents/Benjamin_Johnson_LoanApplication.docx ← Location of content

Data Type: SharePoint Online ← Environment Scanned

Incident ID: IMS-41

Workflow Status: Open

Assignee: admin,ted.logan

Incident Priority: Low

SUMMARY

Created Time: 2019-10-15 16:18:47 (UTC+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna

Created By: Rita Brewer

Modified Time: 2019-10-15 16:18:49 (UTC+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna

Modified By: Rita Brewer

Asset ID: 2957f489-99e2-53f3-1f93-43631867c5e5

SCAN INFORMATION

Test Suite: SSN and Credit Card Test

Scan Status: Failed ← Sensitive Information Scanned for

Risk Score: 0.1

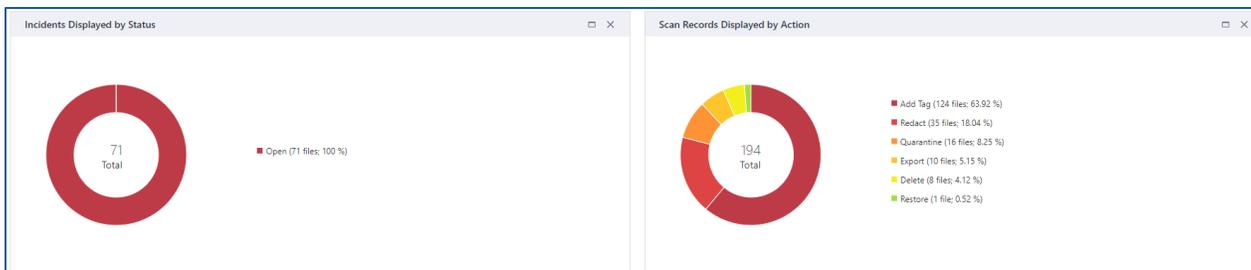
Legacy Risk: 0.5

Classification Code: PII Sensitive ← Classification

Scan Time: 2019-10-15 16:20:36 (UTC+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna

Scanning and Reporting

- Automatic scanning and tagging of sensitive content (CPI, PII, etc.)
- Scan capabilities across all environments (Office 365, file shares)
- Reports for location and type of all sensitive content
- Track and audit all searches on sensitive content



Policy and Insights



- 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!

Considerations for Governance in Office 365

Provisioning



Managed self-service requests that balance business agility and administrative control

Are native user options OK or is more governance required?

Application of appropriate governance controls to automate ongoing management and security

Ongoing Management



Tracking, reporting, and periodic attestation of data ownership and other workspace-specific details (purpose, divisional affiliation, classification, sensitivity, etc.)

Proactive monitoring and remediation for “out of policy” security and permission changes

Expiration, End of Life



Managed lifecycle policies for workspaces with inactivity detection and approval-driven de-provisioning

Automated archiving and offline retention where appropriate

Automated application of content-level retention policies

For More Details...



How To Manage Federal Taxpayer Information In Microsoft Teams

Every government agency that deals with federal taxpayer information or PII will find value in this guide for compliant collaboration in Teams and Microsoft 365.

[Claim My Free eBook](#)



<https://avept.it/tax-info-teams>

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

ឧបត្ថម្ភ

Dziękuję

谢谢

Tack

Mulțumesc

спасибо

Merci

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धन्यवाद

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