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Business Continuity & Productivity

IN THE DIGITAL WORKPLACE

June 22-26, 2020

#ShiftHappens Week Online

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How to Maximize Data Retention Capabilities in Office 365

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Session Recording: https://www.youtube.com/watch?v=mrzfWDQCTK4&feature=youtu.be

Your presenters!

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Microsoft MVP

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CTO, AvePoint Public Sector

Microsoft Regional Director

@JohnConnected

daa

Who are daa...

daa is a global airports and travel retail group that has businesses in **16 countries** with flights to 43 countries.

Owned by the Irish state daa is headquartered at Dublin Airport.

35.5m	€935m	200
Passengers.	Turnover.	Destinations.

Winner 2018, EU Airports 25-40m
World Airport Service Quality Awards

www.daa.ie

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Session agenda

- Understanding native Office 365 retention capabilities
- How a real-world Office 365 customer navigated compliance concerns
- Best practices for mitigating concerns and ensuring compliance

Understanding Office 365 Retention

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Retention Concepts

- Retain in place to ensure items are available for eDiscovery
- Keep data for as long as it is needed
- Remove data after it is no longer needed
- Support general (policies) and specific (labels) retention processing
- Advanced retention:
  - Manual disposition
  - Event-driven retention
  - Preservation lock
  - Data Loss Prevention (DLP) policy-applied labels

Retention Planning

- Know what data you need to keep and how long the data needs to be retained
- Construct policy framework to meet your goals
  - Keep it simple – don't get too complicated at first
  - Develop and evolve over time as you understand how retention processing works in your organization

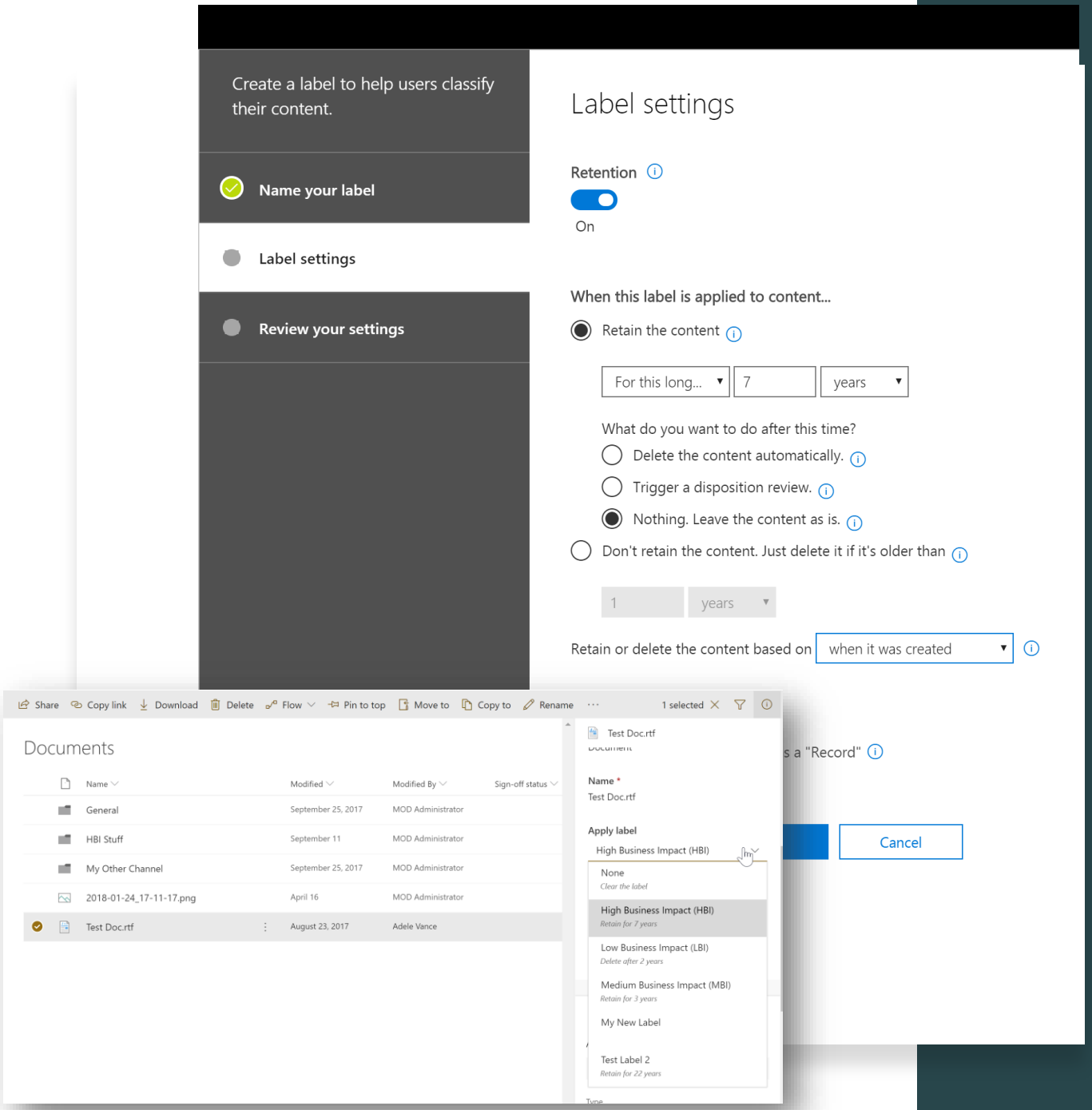
Retention Processing

- Retention processing executes instructions set by policies or individual labels/tags
  - Exchange Online mailbox retention policies
  - Office 365 retention policies (Exchange, Groups, SharePoint, OneDrive, Teams, Yammer)

- Office 365 retention policies can be:
  - Org-wide (apply everywhere)
  - Scoped (apply to selected locations)
  - Label publishing (make labels available to end users)

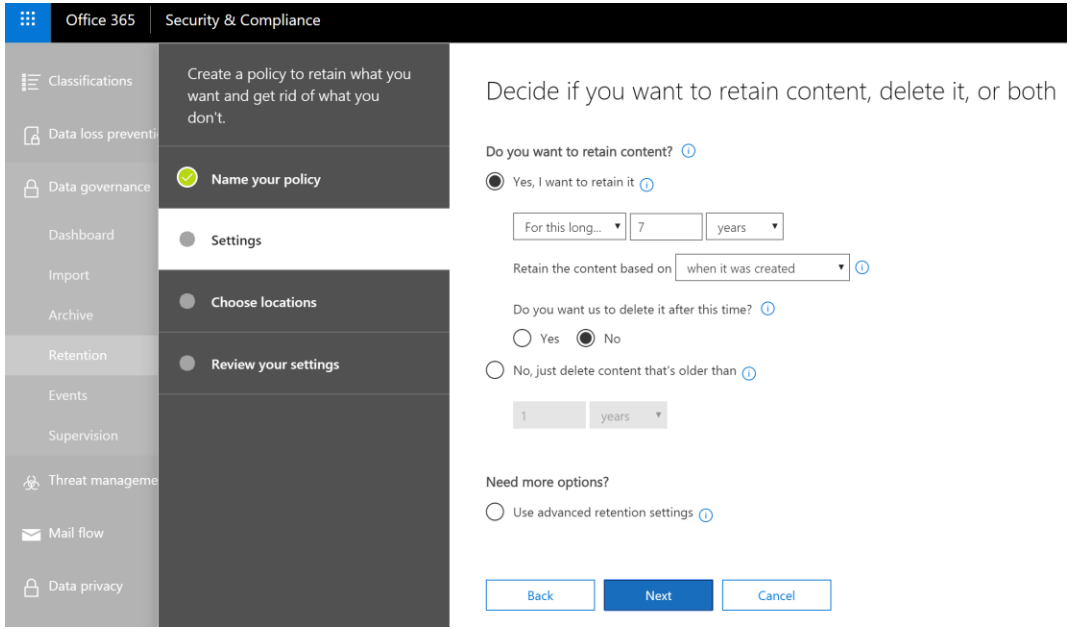
Retention Labels

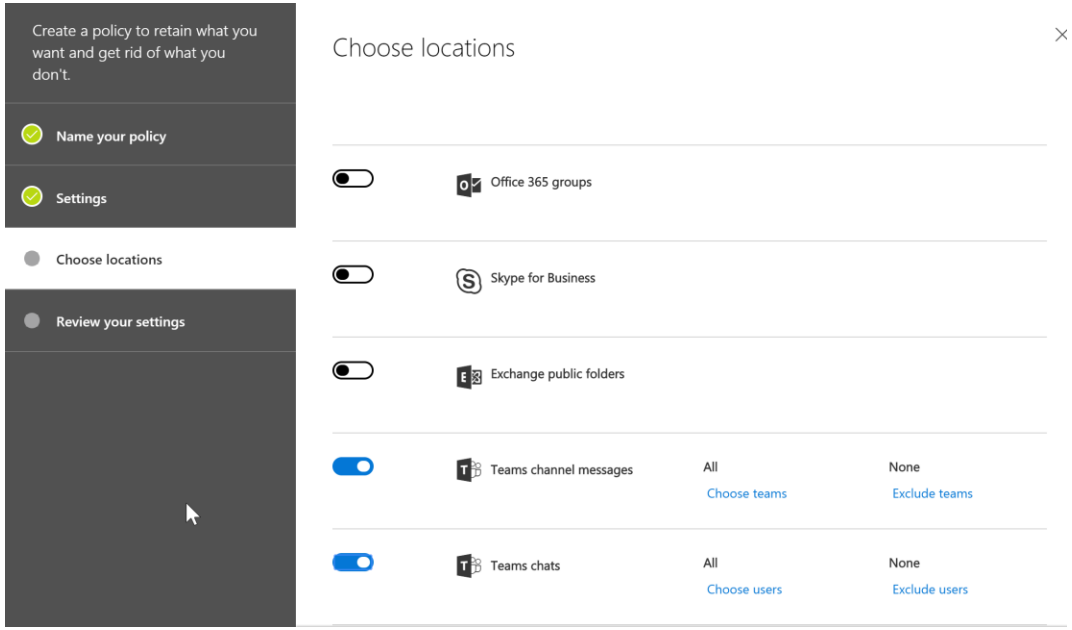
- Specific instruction about how to deal with a document or message
- Each label contains retention period (how long) and action (what do to)
- Integrated into Office desktop and online apps (including SharePoint and OneDrive for Business) to allow users to apply labels
- Different sets of labels can be published (by policy) to different users – don't give people too many choices

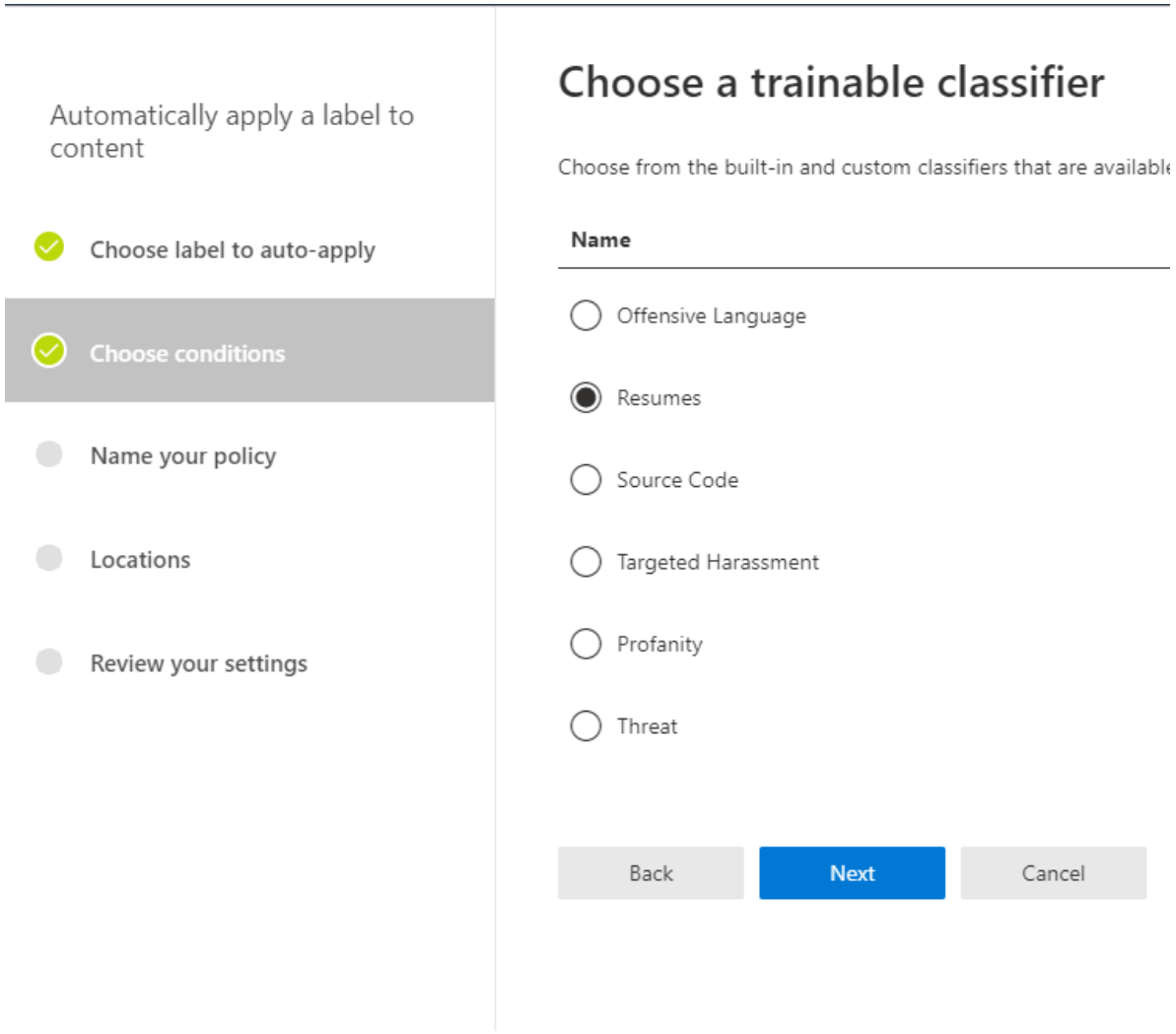


Retention Policies

- Retention settings in applicable policies and labels evaluated and executed against workload locations (mailboxes, sites) by background processes
- Exchange, Yammer, Groups, Teams retention depend heavily on the Exchange Managed Folder Assistant
  - Retained items stay in the Recoverable Items folder
- SharePoint Online and OneDrive for Business use timer jobs
  - Retained items stay in Preservation Hold Library of the owning site







Automatic Retention Labelling

- Office applications can be configured to apply labels automatically
- Auto-label policies available to handle "data at rest" scenarios by applying retention labels to data identified by:
  - Keyword searches
  - Sensitive data types
  - Classifiers (including trainable classifers)
- Manually-applied labels always take precedence over auto-applied labels

Office 365 Retention Framework

- Retains information in-place effectively to make data available for eDiscovery
- Leverages existing workload functionality like SharePoint recycle bin
- Can consume large proportion of SharePoint storage quota
- Doesn’t span all Office 365 data (Stream, Planner, some Yammer networks)
- Easy to make mistakes – too many labels, too many policies, difficult to understand how effective a retention strategy is
- Does not move data off-site (remember, it’s in-place retention)

daa’s Office 365 Compliance Journey

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Why did daa choose a Cloud Backup solution?

- Realization that protecting **your** data is **your** responsibility

- Default Office 365 data retention capability has limitations - ensure you understand these

- Operational Requirements – do the same as we do on-premise
  - Mirror our standard data retention policy across multiple Office 365 workloads
  - Granular restoration capabilities
  - Protection against accidental deletion or intentional deletion

IT Security & Compliance requirements

- Taking control of our data was a key concern
  - Independent location for data (not to relay on a single source)
  - Support our exit strategy - providing some real options around how this might happen
- Robust protection against Ransomware
- Compliance with multiple regulations and internal policies
- Ensure legal requirements and responsibilities are met

How do you know what data is important?

- You need to define, identify and protect the data that is important to you and your business
- Data retention policies can be complex and may take time to develop
- If requirements are not gathered and/or fully understood – there is a risk of not identifying all “important” data

daa vs data retention framework

- We are at the beginning of our journey to implementing a robust data retention framework

- When fully implemented, an Office 365 retention framework will help you achieve all your data retention goals via two actions:
  - **Retaining** content so that it can't be permanently deleted before the end of the retention period
  - **Deleting** content permanently at the end of the retention period

- daa use a combination of the following to achieve our goals:
  - Reduce exposure / scope – disabled several peripheral Office 365 apps (e.g. Stream, Sway etc)
  - Office 365 data retention policies (in-place) for **deleting**
  - Cloud backup (out-of-place) for **retaining**

Putting it all together-
Best Practices for Satisfying Compliance Teams

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Office 365’s rapid innovation through the eyes of…

Microsoft

Compliance

IT

It’s up to YOU to balance this out…

- Restore confidence
  - Users need predictability
  - Compliance wants assurance there is a plan
- Maximize your ROI
  - Sustainable adoption of new AND better ways of working WILL move the needle for your business
- Get in front of it
  - Fail to plan, plan to fail
  - Facilitate the vision
  - Know where the sharp edges are before the slice

Where do I start (or “re-start”)?

Educate yourself…

On what's "in the box"

- *Retention labels and policies*
- *Hold and eDiscovery*
- *What your license level offers*

On what's possible with first party extensibility

- *Power Automate*
- *PowerShell*
- *Home-grown applications*

On what else is out there…

- *Open source/community*
- *3rd Party applications*

Cheat sheet for keeping up on what's OOTB

How Microsoft is THINKING

- *User Voice:* https://office365.uservoice.com/

What Microsoft (and others) are SAYING

- *Ignite On-Demand Sessions:* https://myignite.techcommunity.microsoft.com/videos
- *Tech Community* https://techcommunity.microsoft.com/
- *Microsoft 365 Roadmap* (https://www.microsoft.com/en-us/microsoft-365/roadmap?rtc=1&filters=)

What Microsoft is DOING

- *O365 Message Center*: https://admin.microsoft.com/AdminPortal/Home#/MessageCenter

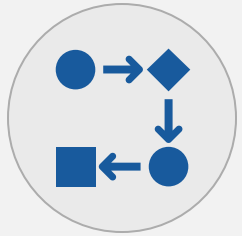
Compliance Features Licensing

- *Licensing Guidance*: https://docs.microsoft.com/en-us/office365/servicedescriptions/microsoft-365-service-descriptions/microsoft-365-tenantlevel-services-licensing-guidance/microsoft-365-security-compliance-licensing-guidance

Help understand educate your organization

Understand specific requirements

Work to separate requirements from fear, uncertainty, and doubt



Get in front of process decisions

Sustainability becomes more achievable when processes are informed by realistic enforcement

Help balance "opportunity" and "impact"

Be a voice of reason to encourage a user-centric approach

Q&A

thank you

Gracias	ευχαριστώ	Danke	Grazie	благодаря
Hvala	Obrigado	Kiitos	شكراً	Tak
Ahsante	Teşekkürler	متشكرم	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	Mulţumesc	спасибо	Merci
תודה	多謝晒	дякую	Ďakujem	धन्यवाद

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