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How to Eat an Elephant - Implementing Office 365 in a Government Agency

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Content



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Office 365 in DFSI / DCS

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Records in Office 365 – a Proof of Concept



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Office 365 in DFSI / DCS

A journey begins with a single step ...

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Background



2016/17 Goal:

- One email system for the whole cluster
 - Fundamental IT 'plumbing' required, very significant piece of work
 - Detailed and careful migration – made sure it was right the first time (groups / rooms etc)



Background

2018 Goal:

- Collaboration tool for the whole cluster
 - Place for everyone to share / talk across entire cluster
 - Replace the multitude of mailing groups and lists
 - In tandem with new intranet (replacing 16)



Background

2019 Goal:

- Making it all work better
 - Better Ways of Working – getting the most out of the software
 - Making it work for you
 - Platform for everyday work



Yammer and Teams



16 locations, 4500 people – what could possibly go wrong?

- 2000 teams by end of two months
- 30% of organisation actively using tools
- Some false starts – Yammer consolidation; Teams accidental migration
- Yes – LOTS of teams, No – no metadata, YES – orphaned Teams

MICROSOFT YAMMER & MICROSOFT TEAMS LAUNCH

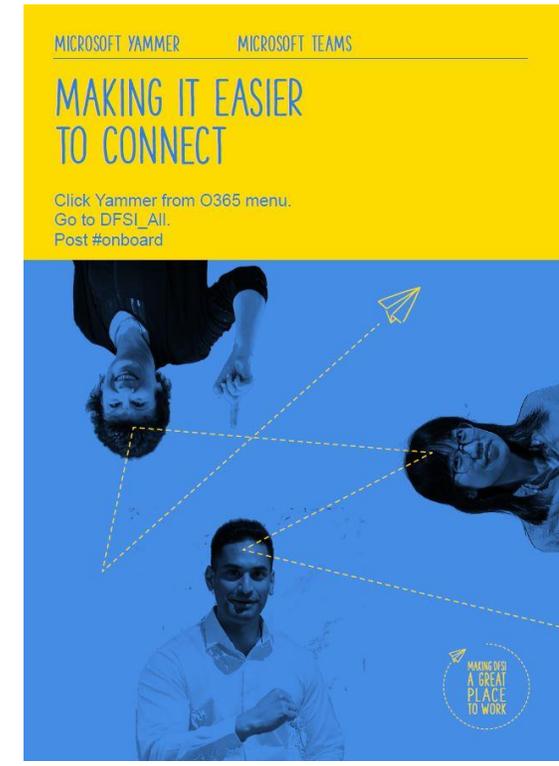
TAKE OFF NOVEMBER	DESTINATION YAMMER
TIME ASAP	JOIN US CLICK YAMMER FROM 0365 MENU. GO TO DFSI_ALL. POST #ONBOARD

BOARDING PASS >>>>> BOARDING PASS >>>>> BOARDING PASS >>>>>

Join the challenges on Yammer to win prizes!

What have we done?

- Focus on content and records from the start
- Yes, we'd probably do it differently with hindsight with more metadata
- BUT – it's well used, has saved thousands of hours, and change the way we all work
- Different features loved by different people – easy Skype meetings (one touch); co-authoring; Teams chat; work from anywhere / any device
- Innovative and creative solutions across cluster





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Records in Office 365 a Proof of Concept

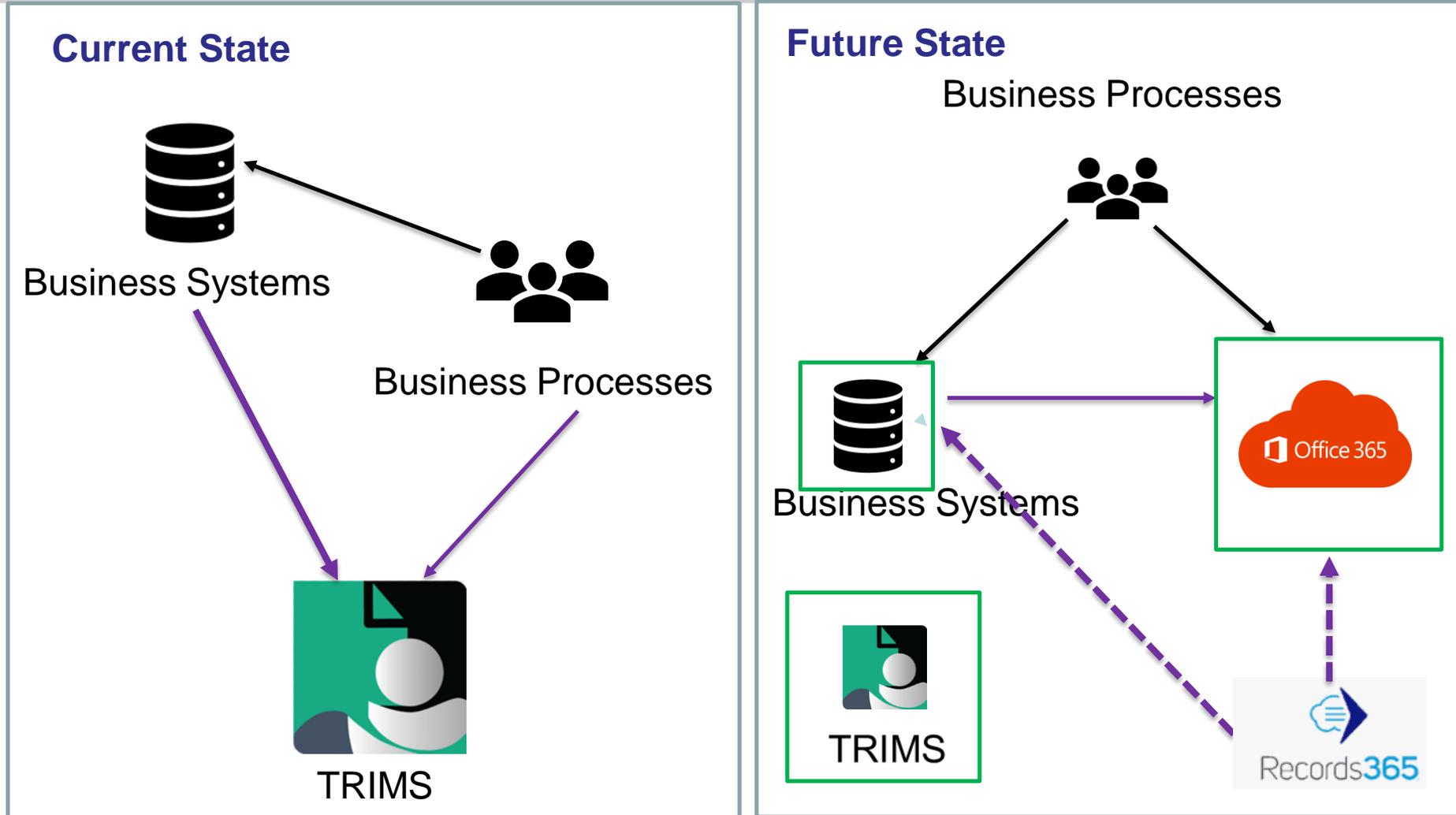
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A Paradigm Shift in Records Management



Paradigm Shift – Records Management in Place



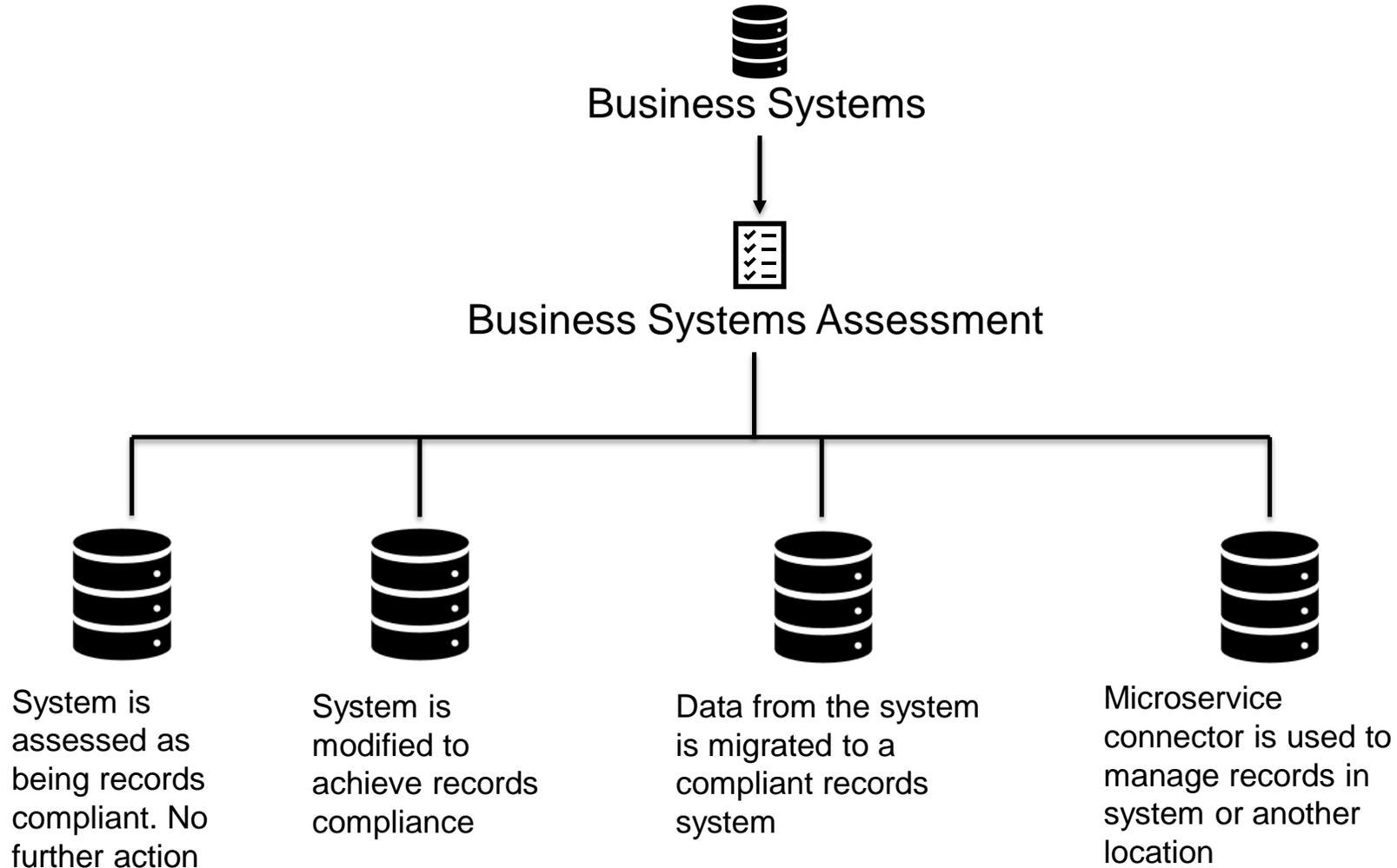
Key: Information input ←

Records Input ←

Connector ←

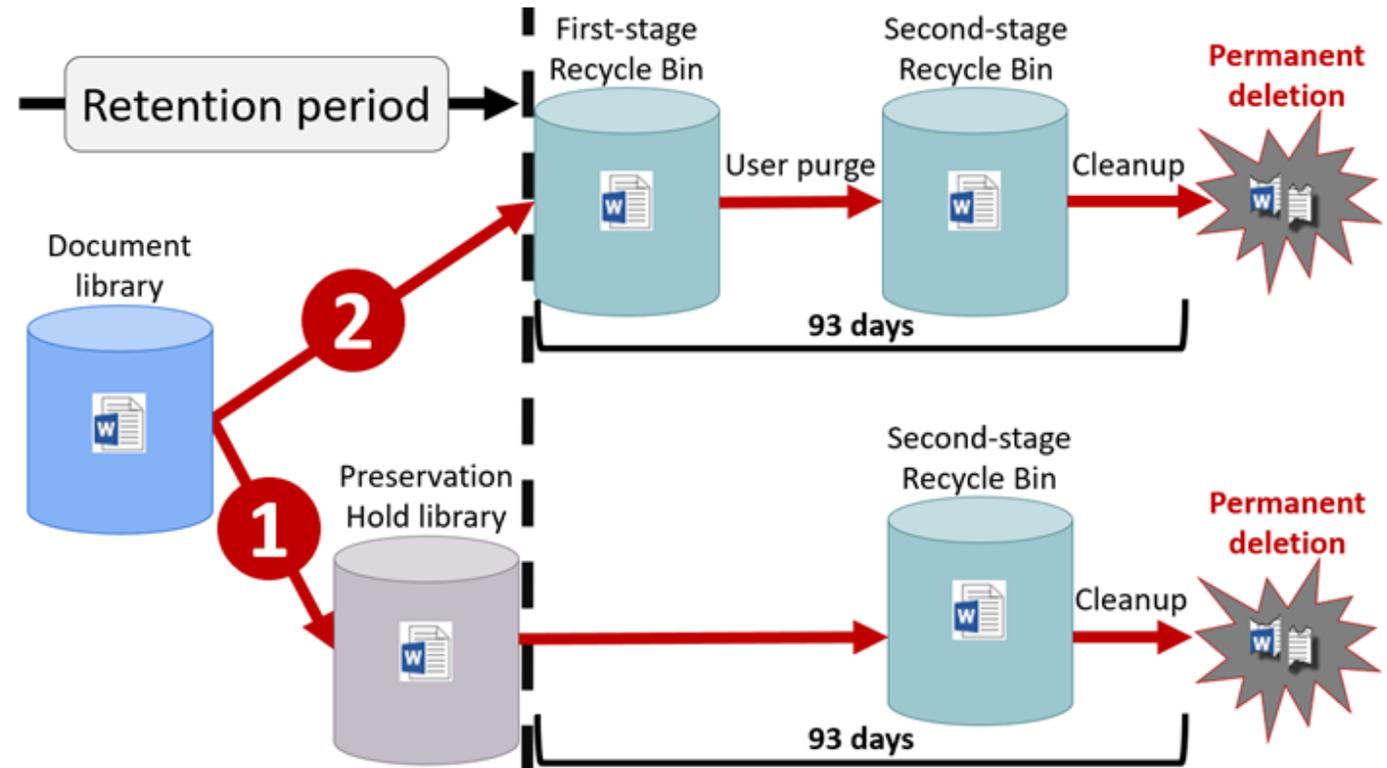
Compliant System —

Business Systems Options



A Little on Retention in Office 365...

- There are many levels of retention in O365
- Retention can be set on sites, Exchange content and OneDrive
- There is a Preservation Hold in O365



Proof of Concept – Vision Statement



- Users are being encouraged to use Office 365 as a platform
- There has been historically little compliance for documents needing to be manually moved to TRIM
- Moving documents manually from SharePoint/Teams is complex
- Changes to ownership and a lack of innovation has led to a loss of confidence in TRIM/RM/CM

“We want to manage information in O365 in a compliant way which does not impose an administrative burden on end users”



Compliance with Standard 12 – Standards on Records Management

Records Manager sign-off

- Information is managed effectively
- Sufficient audit details are captured to understand the records

Systems Manager sign-off

- The system isn't onerous or expensive to manage
- The system is extensible and flexible enough for an organization in a permanent state of change

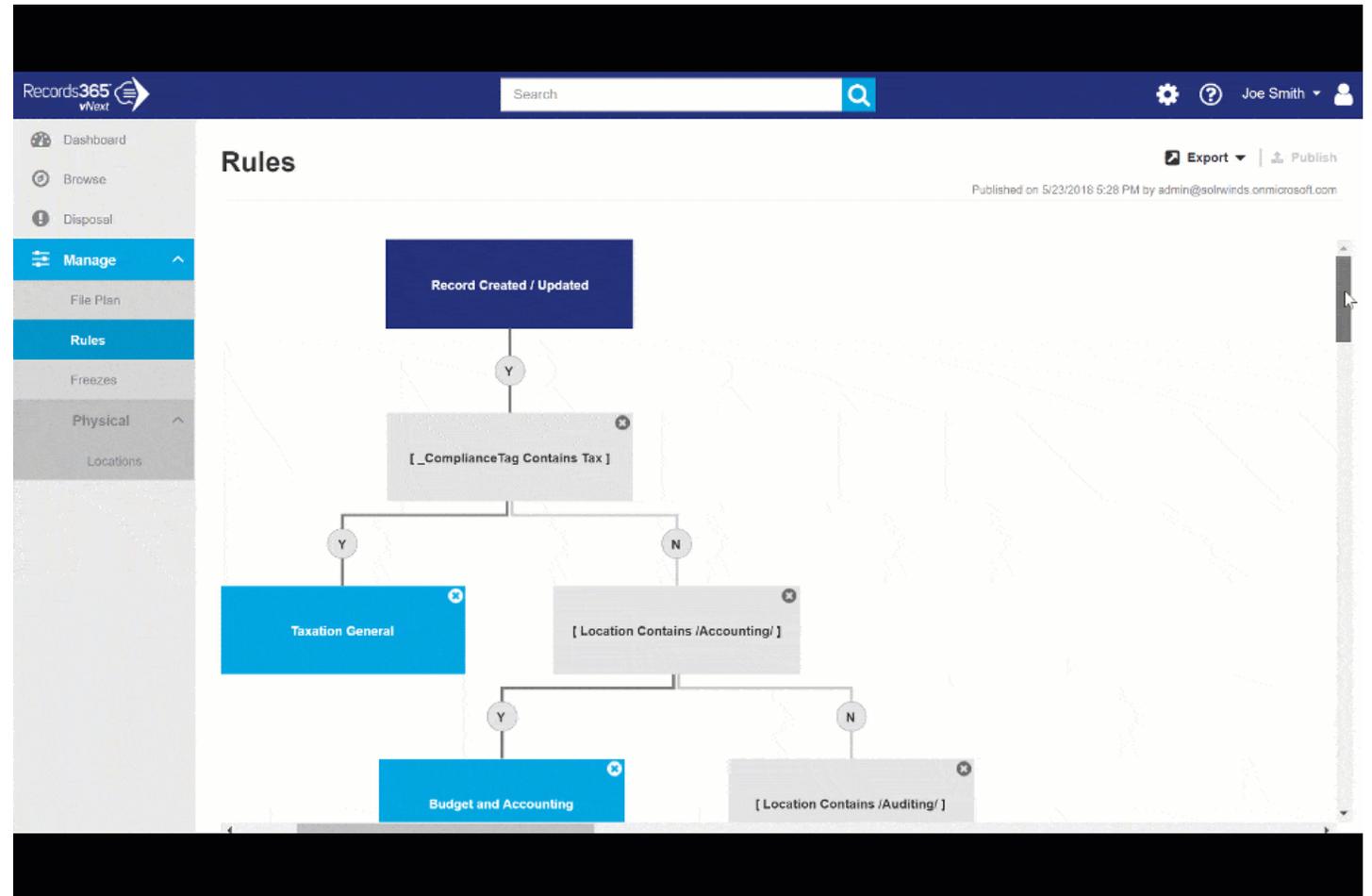
About Records365



- Uses Azure/Microservices to control information in other environments
- We are focusing on O365, but Records365 can connect already to Box, shared drives* etc, and have plans for Salesforce
- Was very rules focused

R365 Rules Engine

- If / Then Statements
- Can target any metadata element
- Can end up very complex



The Good...



- Easy to set up
- Good assistance from RecordPoint
- Clean user interface in dashboard
- Binary of record is captured
- All metadata is captured
- Does allow for holds and approval before disposal
- Easy to import file plan
- Rules engine does allow for granular retention

The Bad



- Massive sprawl possible in Rules Engine
- Record level disposal, not container level
- Approvers shown all records due for destruction, not records selected
- Captures items that may be irrelevant such as calendar entries
- No indication of move or copy
- Limited audit events captured in R365 – need to rely on SPO for complete audit events
- Limited ability to see records in context
- We could not get the connector to work on the shared network drives (security)

The Ugly



- No customization of columns presented in dashboards
- Unable to navigate through aggregations
- Duplicate events in audit log
- Insane amount of metadata elements – unable to order or hide

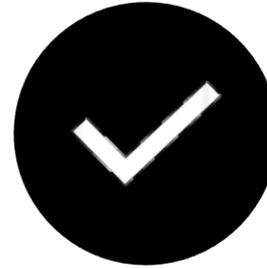
Machine Learning



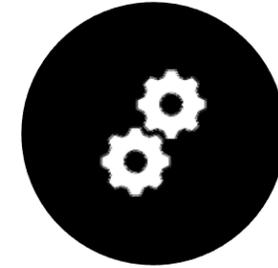
UNABLE TO CONTROL THE
CREATION OF
GROUPS/SITES/TEAMS



TARGET HIGH RISK/HIGH
VALUE INFORMATION



APPLY CONSISTENT RULES
ACROSS ORGANIZATION



REDUCE WORKLOAD AND
SPRAWL CONSTRUCTING
RULES IN RULES ENGINE



Next Steps...



