

Governing Your Data in O365

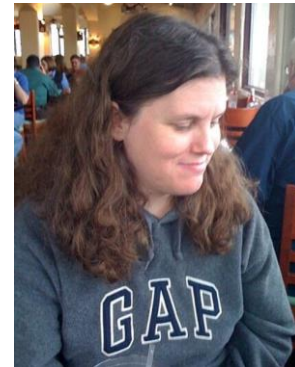
Classifying, Retaining, Complying and Discovering



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Who am I?

- Principal Consultant, O365 Evangelist, Cloud Whisperer
- Been in IT since 1990, SharePoint since 2003, and Catapult since 2007



What is Governance and Why is it important?

The act of affecting and monitoring (through policy) the long-term strategy and direction of an organization. In general, governance comprises:

- Traditions

- Institutions

- Processes

that determine how:

- Change is exercised

- Users are given a voice

- Decisions are made on issues of company-wide concern.

Peace, Love, and SharePoint

Pros

Fast to Implement

No barriers to growth

Used for anything and everything

Cons

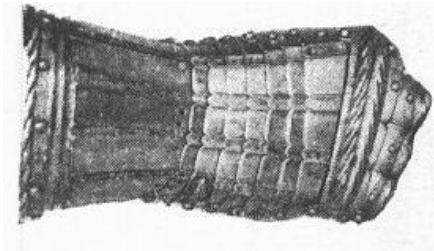
No control on growth

Poor security, findability, navigation, etc.

No service assurances



The Iron Gauntlet of SharePoint



Pros

Central regulation of
Navigation, Taxonomy,
security

Everything is done the
“right” way

IT (Owner) is in control

Cons

Slow to Implement

Don't use new
functionality until its fully
understood

Shadow IT will flourish

The challenge that we face

Used to upgrade SharePoint every version or two (every 3-5 years)

Upgrades involved:

- New Hardware

- New Features

- New Design

- Moving old content to the new farm – R.O.T. Analysis

Office 365 and SharePoint now upgrade continuously

- No “Burning Platform” for new Hardware, Design, R.O.T. Analysis

Data Governance Challenges

- In the modern world of digital communication, the amount of electronic data grows exponentially, leading the company to do a daunting job of deciding what to keep and what not to keep
- 44 Zetabytes of information created each year now (and increasing)
- Data stored in different repositories (example: One Drive, SharePoint, Exchange)
- Reducing compliance risk is directly proportional to reducing amount of data and keeping only the high value data
- Anything that is not adding business value, should be on the road to deletion

Personas in Data Governance

- Personas of Data Governance (Permissions/Rules)
 - Compliance Officer (CO)
 - Ensure employees abide by internal policies and regulations set by regulatory bodies
 - Continuous review of policies and regulations
 - Records Manager
 - Oversee implementation of Data Retention, Archival and Classification
 - Coordinates with program managers to ensure schedules of records (retention, creation etc.)
 - Monitors the insights and usage of policies and take action to ensure efficient records management
 - IT Admin
 - Custodian of O365 Service
 - Perform System maintenance and regular health checks
 - Information Worker
 - Make use of all compliance and data governance
 - Understand attributes attached to a document
 - Auto classification of content will help them work faster



Laundry as an Analogy

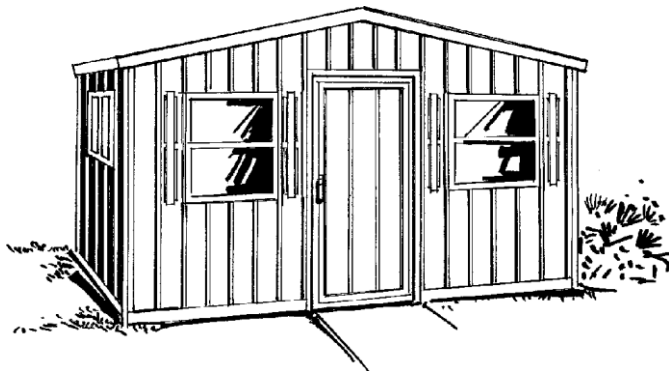




Corporate Data as Laundry



Iron Mountain



O365 Data Governance From the Tenant to the Item

- Retention Policies
- Data Loss Prevention
- Advanced Data Governance Labels
- Azure Information Protection
- Records Management
- Workload Specific Data Governance

Tenant Level Controls

Retention Policies

Two competing and conflicting Priorities:

- Retention of Data

- Deletion of Data

Lots of Locations Data is stored:

- Exchange

- SharePoint/OneDrive

- File Shares

Policies:

- Can apply to all workloads, or to subsets of each workload

- Can Retain data

- Can Delete data

- Can be applied only to specific keywords or sensitive information

Demo #1 – O365 Retention Policy

Data Loss Prevention

- Created at a Tenant Level, but Applies to each Item when it is emailed or shared
 - Can use standard sensitive information types (Medical, Privacy, Financial) or custom
 - Can apply to Email, SharePoint, and OneDrive
 - Can be used to track internal or external sharing
- Advanced rules can be created for complex scenarios
 - Content Matches, Shared, IP match, email attachments not scanned, password protected emails, attachment file types, etc.
 - Can restrict access or automatically encrypt outgoing emails

Demo #2 – Data Loss Prevention

Item Level Controls

Advanced Data Governance Labels

- Applied to a specific item
 - Can be used to Retain the item
 - Can be used to Delete the item
 - Can be used by Data Loss Prevention to control the movement of the item
 - Can be used to “Recordize” the item
 - Each Item can have Zero or One ADG Label
- Created by Admins in the Security & Compliance Center
- Two ways to apply a Label
 - Published and applied by an End User
 - Automatically applied by O365 based on keyword or sensitive data (E5)

Demo #3 – Advanced Data Governance Labels

Azure Information Protection

- Applied to an Individual Item
 - Can classify an Item
 - Can apply Digital Rights Management to an Item
 - Can apply Headers, Footers, and Watermarks to an Item
- Future plans include
 - Ability to use as part of DLP (we think)
- Warning: O365 Search cannot decrypt DRM encrypted files
 - They do not appear in search
 - They do not appear in eDiscovery searches
 - eDiscovery can export and decrypt protected files
 - Admins can use PowerShell to encrypt and decrypt files

Demo #4 – Azure Information Protection

Workload Level Controls

Exchange Retention Labels and Policies

- Same controls that have always existed in Exchange
- Create in the Exchange Admin Center
- Retention Tags
 - Can be Default (entire mailbox, specific folder, or user applied)
 - Set retention period (in days)
 - Then Move email to Archive, Recycle Bin, or Permanently Delete
- User can apply to an item or to a folder (all items in folder inherit tag)
- Retention Policies are groups of Retention Tags that can control who gets to see what tags and what tags are automatically applied to default folders

SharePoint Records and Retention

- All of the On-Premise tools are still available
- Create a Records Center to “recordize” items
 - Can flag as a record in place, link to Records Center, or Move item
 - Content Organizer looks at Metadata in Records Center and stores record
 - Usually entire record is immutable as opposed to ADG Label Record
 - Retention Policy of Content Type determines how long a record is kept

When to use what?

- Need to apply retention rules across SharePoint, Exchange, Groups and Skype?
 - If the answer is yes, then O365 Governance is the best (and really only) option across the O365 platform.
- Need workflow automation around the review and disposition of documents?
 - If the answer is yes, the SharePoint IMPs are the way to go, as you can call custom workflows and set multiple layers of actions.
- Need to identify and retain content based on information contained in a document?
 - If the answer is yes, O365 Governance provides the ability to search and retain documents based on keywords or “sensitive information” policies.
- Need to be able to apply different policies per site and library?
 - If the answer is yes, then SharePoint IMPs allow this level of detailed designations.
- Need the ability to designate some document are “records”?
 - Both O365 and SharePoint have similar records functionality.
 - O365 Governance provides the ability to designate records based on information contained in the content of a document.
 - SharePoint provides the ability to apply record designation manually or via the outcome of a workflow.
- Document retention and disposition policies general and simple?
 - If the answer is yes, O365 Governance can provide an effective solution.

Questions

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