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

27 November 2019

www.customerservice.nsw.gov.au
Content

Gillian Wood – Director, Information Management, DCS
Office 365 in DFSI / DCS

Wendy Collis – Manager, IM Systems, DCS
Records in Office 365 – a Proof of Concept
Office 365 in DFSI / DCS

A journey begins with a single step …

www.customerservice.nsw.gov.au
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)
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
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
Records in Office 365
a Proof of Concept
A Paradigm Shift in Records Management
Paradigm Shift – Records Management in Place

**Current State**
- Business Systems
- Business Processes
- TRIMS

**Future State**
- Business Processes
- Business Systems
- TRIMS
- Records365

**Key**
- Information input
- Records Input
- Connector
- Compliant System
Business Systems Options

- System is assessed as being records compliant. No further action
- System is modified to achieve records compliance
- Data from the system is migrated to a compliant records system
- Microservice connector is used to manage records in system or another location
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
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
• 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
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...