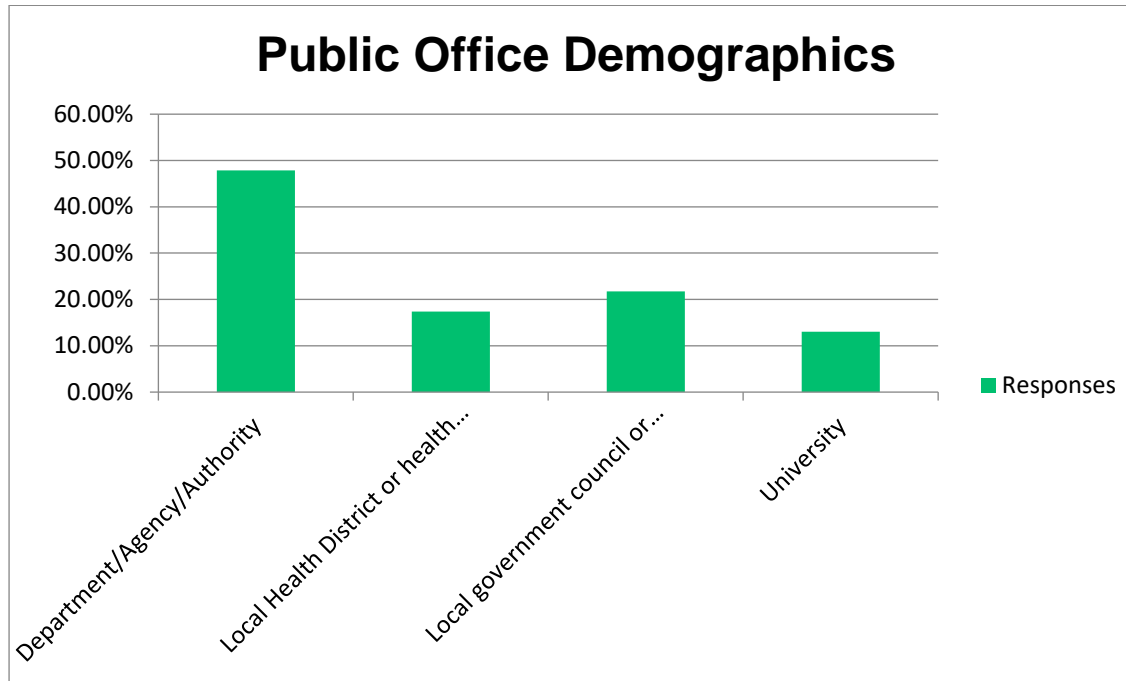


M365 Survey Results – Highlights

Public Office Demographics

- 14 Public Offices completed the survey (6 incomplete surveys – total 20)



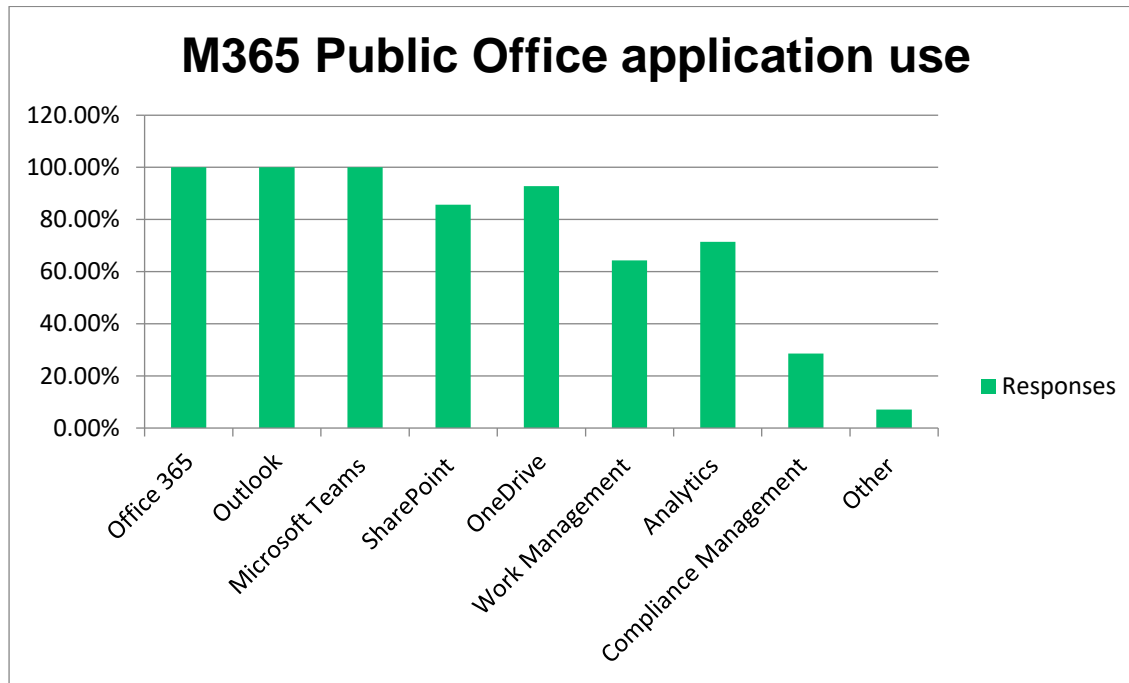
M365 Status

- 10 public offices have deployed M365
- 4 public offices in implementation/configuration stage

M365 Licence

Public offices are predominately using an E3 licence.

M365 Applications



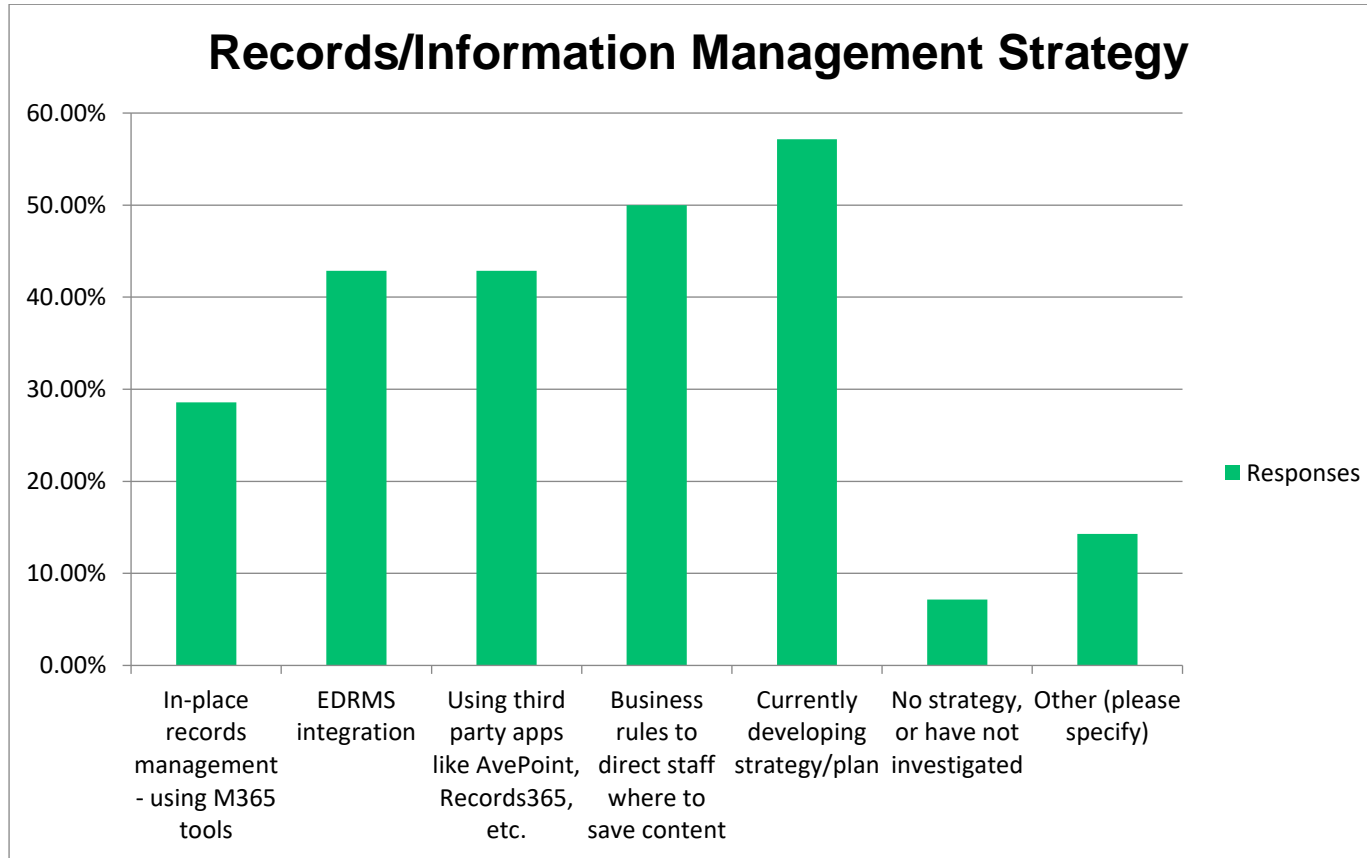
All public offices are using the following applications:

- Office 365 (Word, Excel, PowerPoint, OneNote, Publisher, Access)
- Outlook
- Microsoft Teams (Stream, Sway, Lists, Forms)

Nearly all public offices are using:

- SharePoint
- OneDrive

Records/Information Management Strategy



Public offices vary in their approach to records/information management in M365.

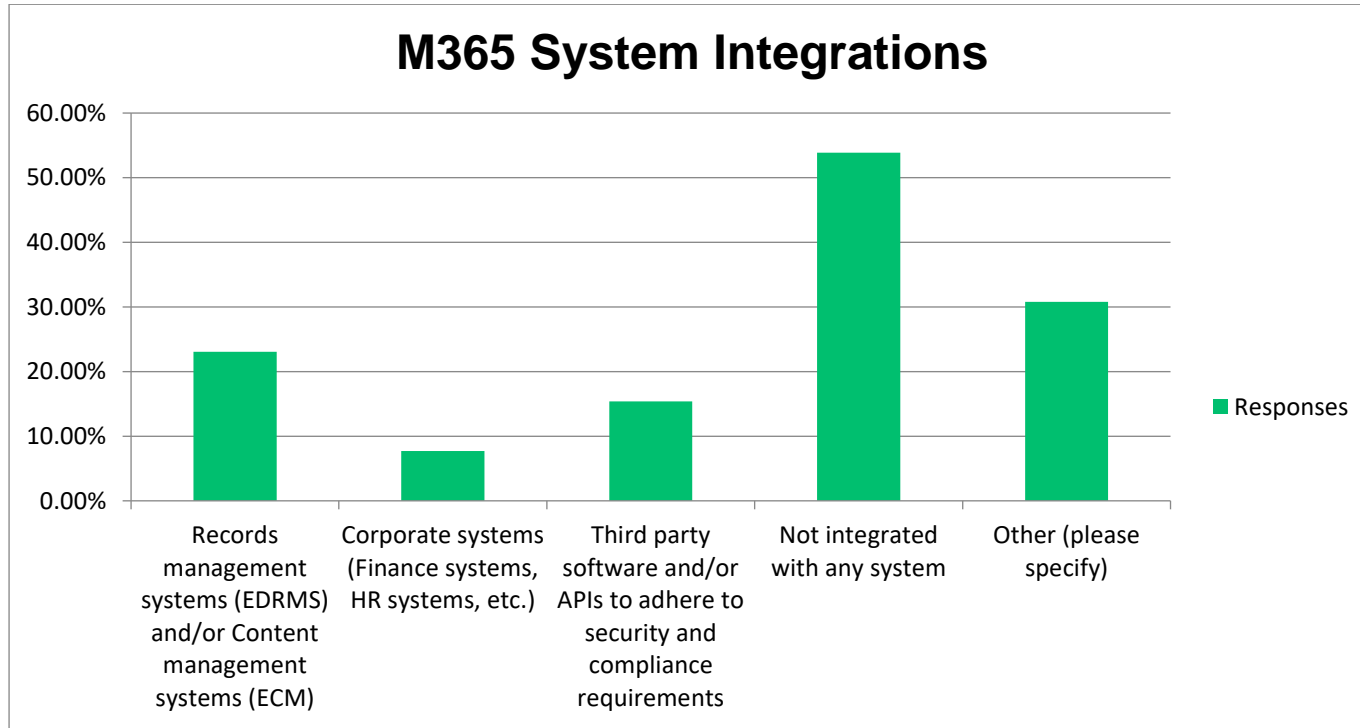
Half the public offices are:

- still in the development stage of how to implement recordkeeping/information management practices for M365
- creating business rules to direct staff where to save their content
- making use of EDRMS integration or using third party apps.

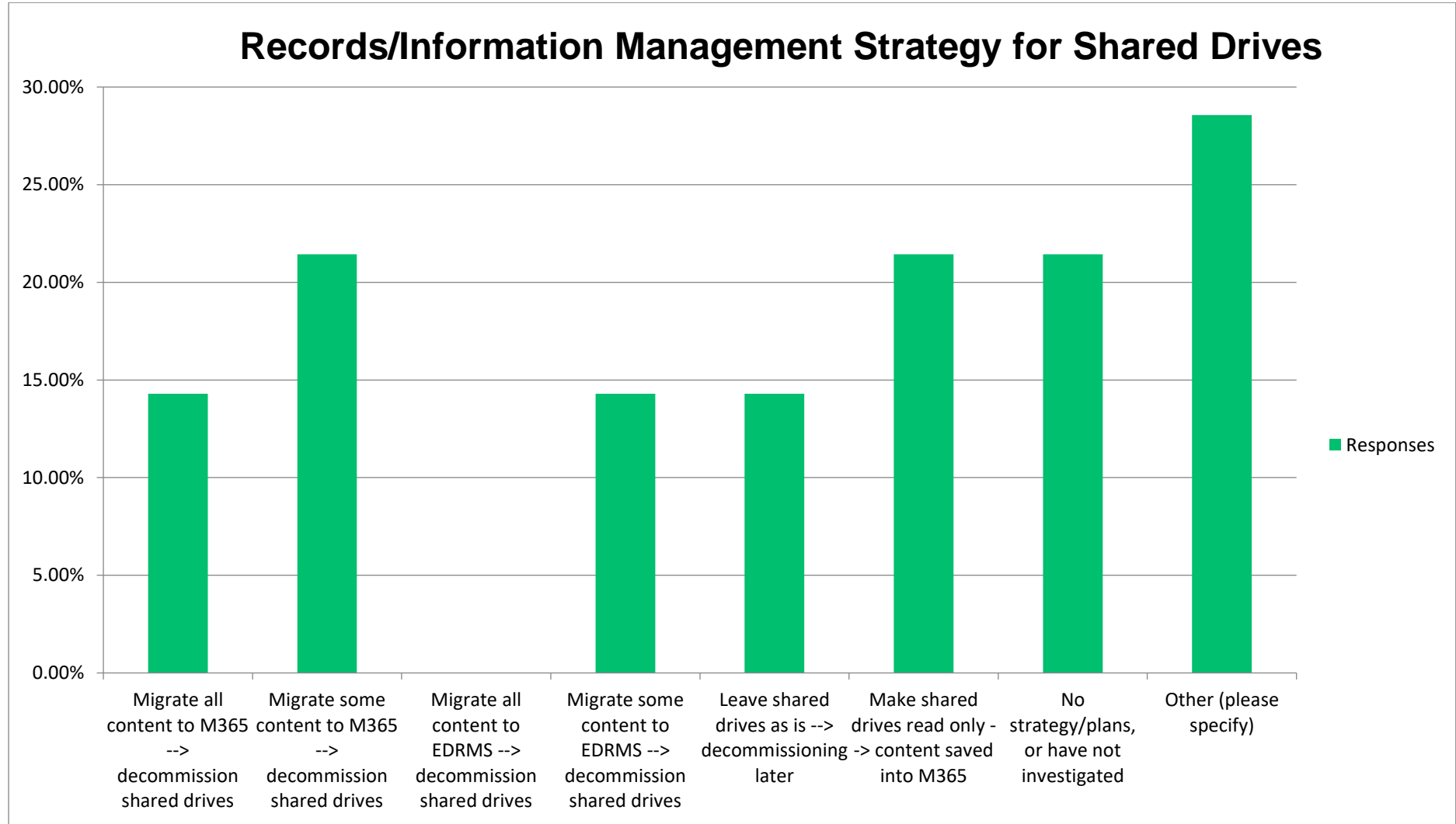
Only 4 public offices are making use of in-place records management tools within M365. Make note, that 3 of the 4 are also using EDRMS integration.

One public office is relying only on in-place records management tools within M365.

M365 System Integrations

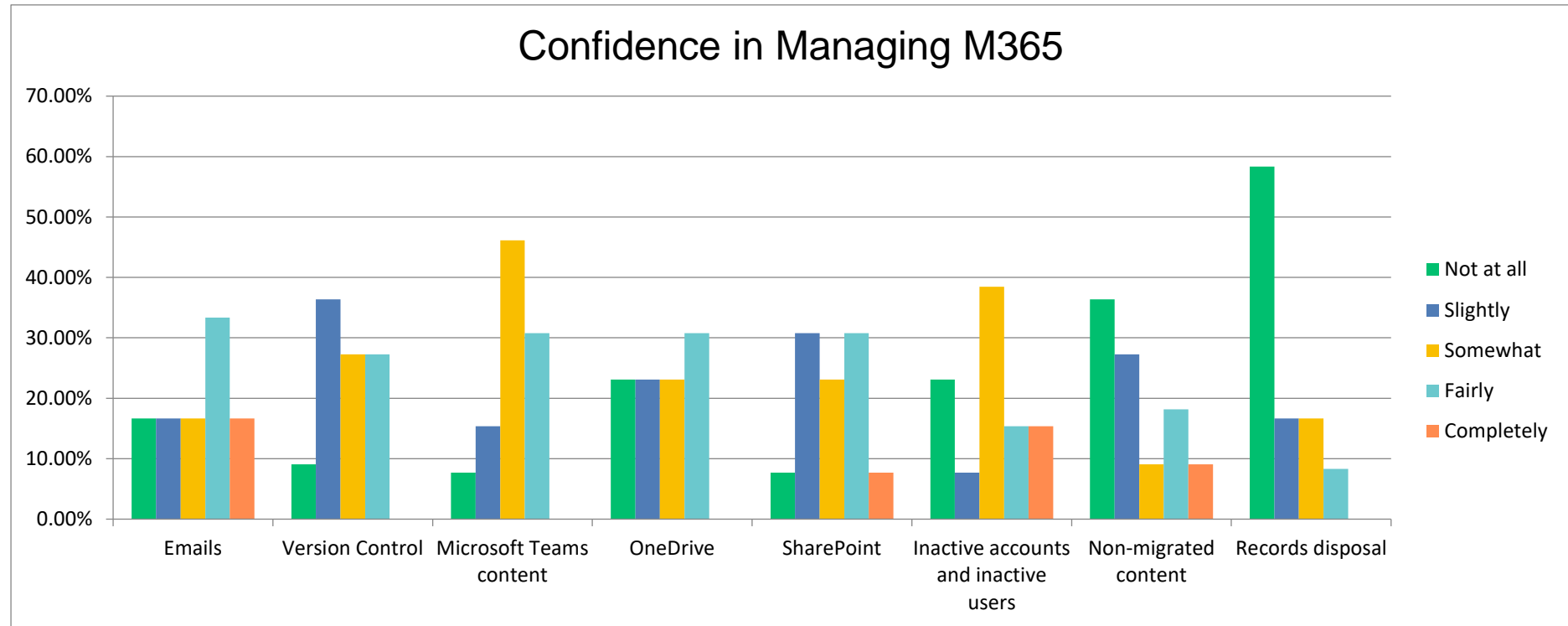


Records/Information Management Strategy for Shared Drives



Overall, the strategies for managing records/information in shared drives varied between public offices. The common practice appears to be the transition of most records/information from shared drives to M365 or EDRMS. Two public offices have completely phased out shared drives.

Confidence in Managing M365¹



¹ 13 public offices answered this question

From the results of the survey, it is evident that public offices require guidance/assistance in the following:

- Records disposal (9 of 13 responses – not at all or slightly confident)
 - Upon reviewing the M365 disposal dashboards in E3 and E5, the dashboards are not built with consideration of usability/recordkeeping business system requirements for NSW government recordkeeping standards. Additional assistance, workarounds, or public offices providing case studies may be necessary to ensure appropriate disposal practices are adhered to within M365.
- Non-migrated content (7 of 13 responses – not at all or slightly confident)

Public Offices may also require additional guidance on the following:²

- Inactive accounts and inactive users
- OneDrive
- Microsoft Teams

Public Offices may require further guidance on the following:³

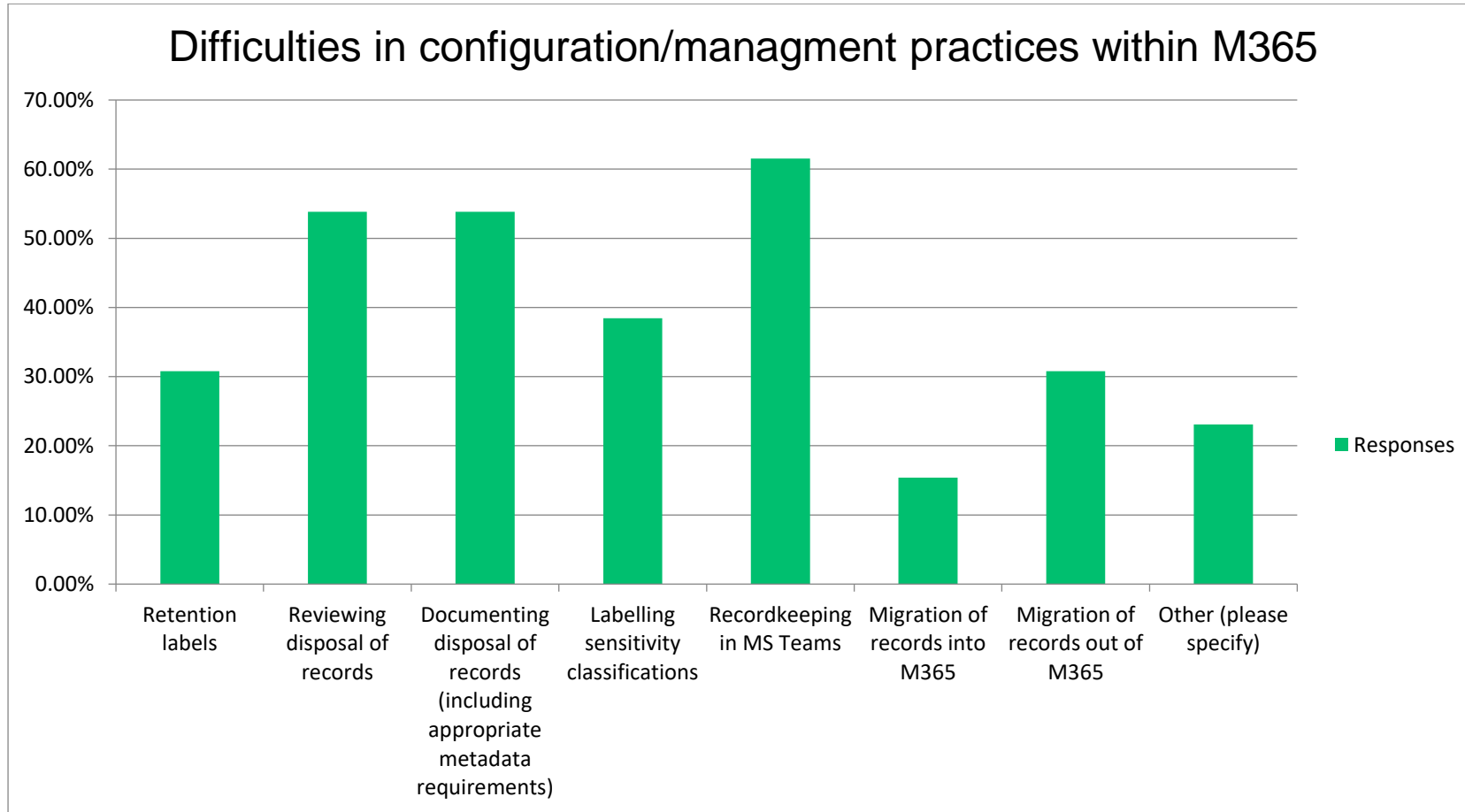
- SharePoint
- Version Control

Overall records/information management practices in the varying situations require additional guidance.

² 9 of 13 responses were either: not at all; slightly confident; somewhat confident

³ 8 of 13 responses were either: not at all; slightly confident; somewhat confident

Difficulties in configuration/management practices within M365⁴



⁴ 13 public offices answered this question

Top 3 difficulties in configuration/management practices within M365:

1. Recordkeeping in MS Teams
2. Reviewing disposal of records
3. Documenting disposal of records (including appropriate metadata requirements)

Public Office workarounds to ensure NSW Standard on Records Management is adhered to

6 public offices provided feedback. Workarounds include:

- Public offices providing business rules to their public office to ensure that records are stored according to the NSW Standard on Records Management
- The integration of EDRMS or a third-party RM platform for records management in M365
- Setting retention period in M365 to 7 years after delete
- Placing a general hold on the disposal of records until M365 disposal compliance issues are resolved.

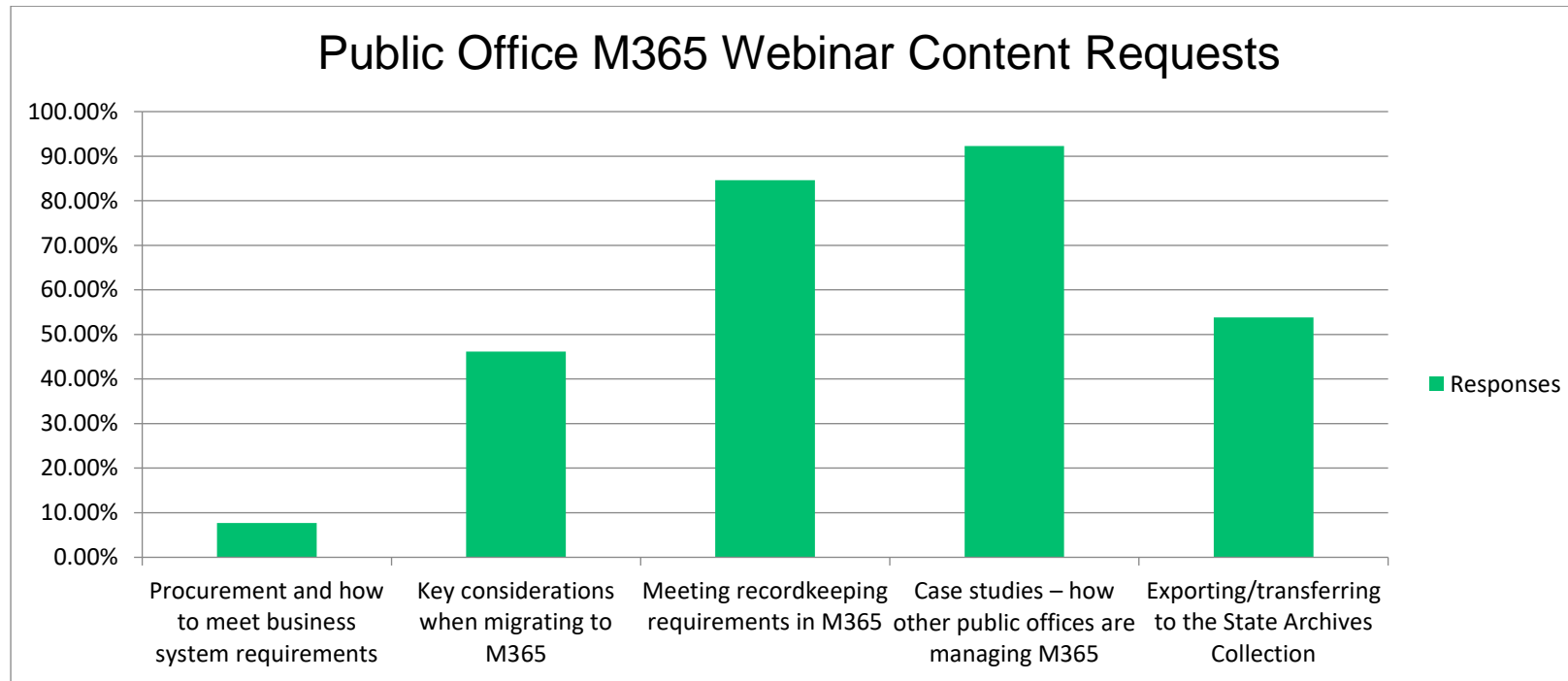
Overall, public offices do not trust M365 as a stand-alone product to meet the NSW Standard on Records Management.

Lessons learnt by Public Offices during procurement, configuration, and implementation of M365

6 public offices provided feedback. Most of the feedback highlights issues within M365. The points are as follows:

- Plan records management early in project life cycles.
- Only use specific functions of M365, records, including emails remain on-premises
- No need to hurry implementation
- Sharing internally from OneDrive cannot be turned off – cannot produce company wide report on who is sharing from OneDrive
- Versions are captured automatically, every few seconds – resulting in extreme version capture
- Large number of new repositories for storing and sharing documents cannot be seen
- Control implemented for the creation of Teams sites – only Information Management Team can approve/create sites to ensure records capture and visibility.
- Primary issue is dealing with multiple M365 tenants across a merged organisation – challenges with sharing and accessing content.
- Records compliance is still an ongoing issue. Active interest in 'in-place' records management to the extent that the M365 and associated technology permits.

Public Office M365 Webinar content requests



As per the 2021 Satisfaction Survey results, there is a high level of interest in a M365 webinar for public offices. Public offices would like to see the following covered:

1. Case studies – how other public offices are managing M365
2. Meeting recordkeeping requirements in M365