



Cloud Electronic Document Management

Your next, and possibly your last, upgrade...



Microsoft
Partner



2017 Partner of the Year Finalist
Cloud Productivity Award

Who We Are.

- Tim Cone – Productivity Practice Director, Gulf Coast Region
 - Tim@catapultsystems.com
- Reza Dorrani – Productivity Practice Technical Lead, Gulf Coast Region
 - Reza.Dorani@catapultsystems.com
- Catapult Systems – catapultsystems.com
 - Cloud Services and Systems Integrator
 - Microsoft Partner (NSI)
 - Started in Austin TX
 - Been around for 25 Years
 - Gulf Coast offices in Austin, San Antonio and Houston
 - Other offices in Dallas, Denver, Tampa, Phoenix
 - National and Global Services



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Today's Discussion

- Covering the 5 W's of the Cloud (and one How...)
 - Who's Going to the Cloud
 - When are They Going
 - Where are they going?
 - What Will I Find When I Get There
 - Why are They Going?
 - How Do I Get there?
- An Example of Where – Office 365/SharePoint Online

Who and When?

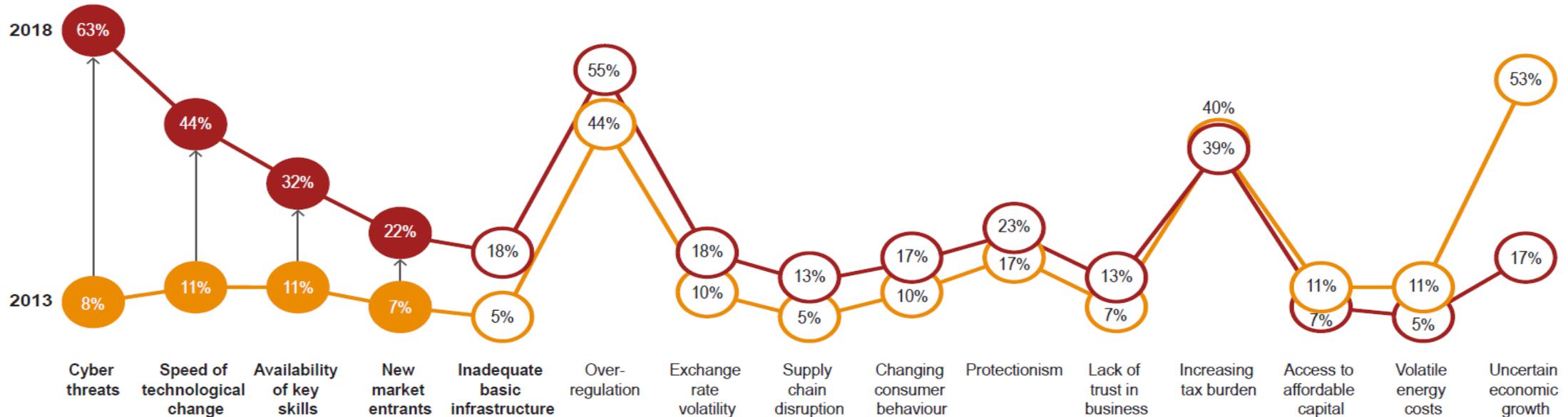
- In 15 months, 80% of all IT budgets will be committed to cloud solutions. 

Why Are They Going?

Fears over losing a technological edge have risen more sharply than other types of threats over the past five years

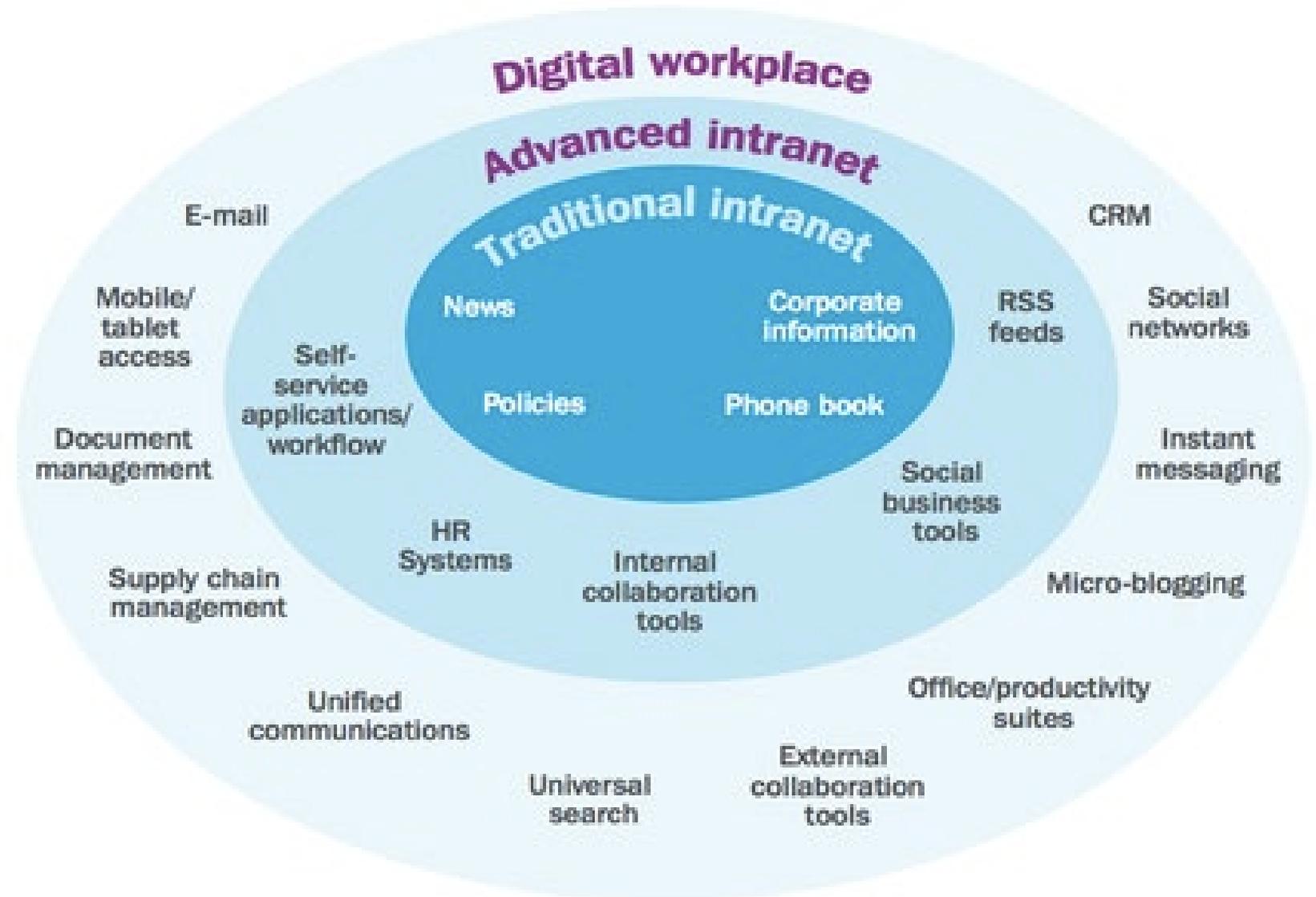
Advances in artificial intelligence, blockchain, autonomous transportation, gene editing and other technologies open the doors to formidable new entrants ... and unscrupulous actors.

Q. How concerned are you, if at all, about ...?



Why – To Facilitate the Digital Workplace

The Digital Workplace is an ecosystem of platforms, technologies and services that lives at the intersection of people, organization and technology. It provides the capability to Connect, Collaborate and work from anywhere with any device capable of connecting.



Why Invest in a Digital Workplace?

- Efficiencies, Opportunities, Data (Global KPI's)
- By 2025 millennials will make up 75% of the workforce and climbing
- 76% of full-time workers would leave their job if the right opportunity comes along
- Increasingly employees are looking towards flexibility, autonomy, and recognition as opposed to just money, work on their terms...
- Employees more frequently judge their employer by the technical environment they work in
- Connecting to employees is hard but connected employees stay longer and are more productive

What's Up There

The Systems in the cloud are generally made up of multiple coordinated and connected services

Public – Amazon, Azure, Google

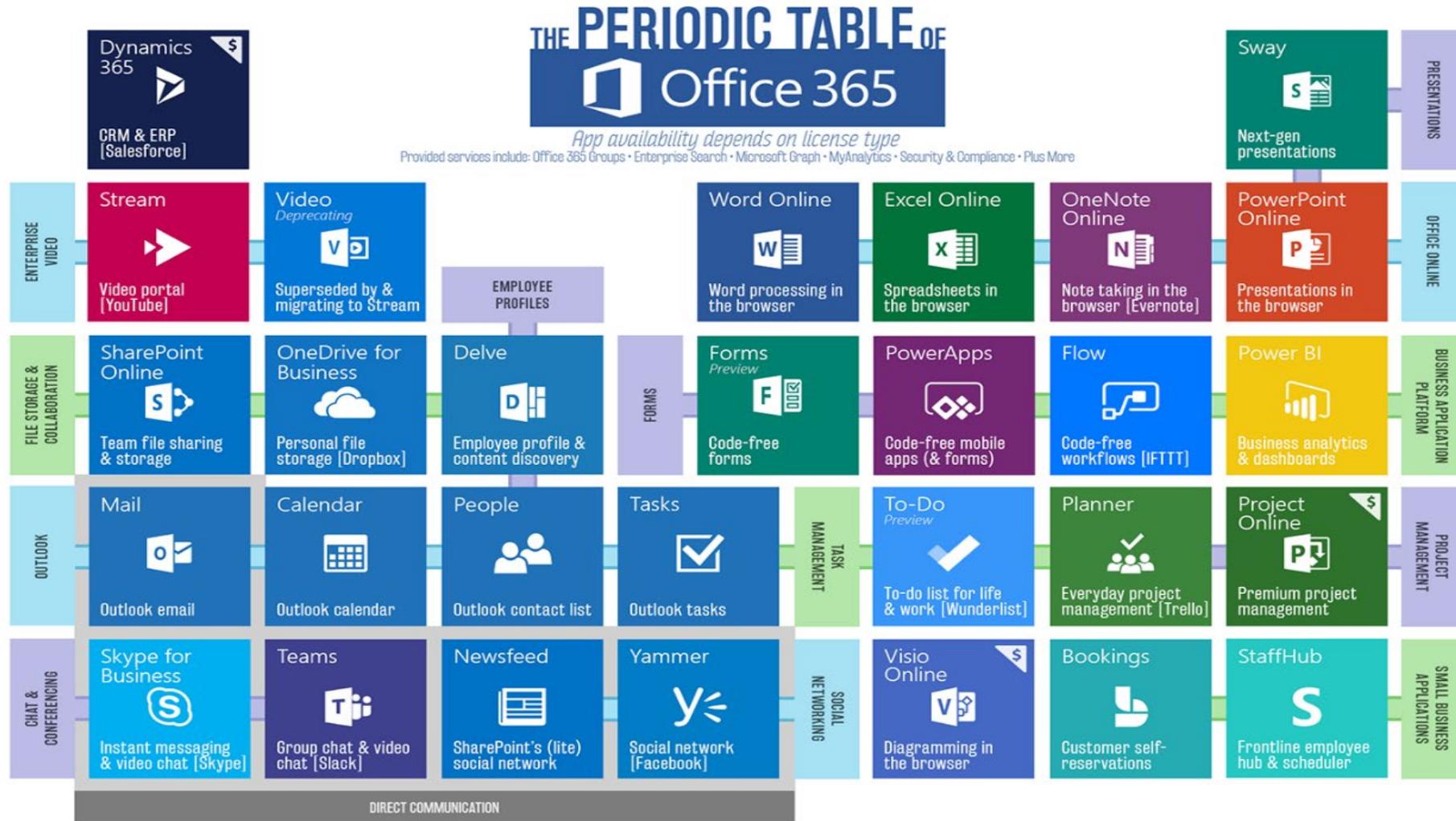
Private – Corporate Cloud

Community – Universities and Healthcare

Hybrid – Mix it up

- Software as a Service (SaaS)
- Platform as a Service (PaaS)
- Infrastructure as a Services (IaaS)

What is there? One Example



*Items in [brackets] identify software with similar functionality for the sake of context

Microsoft 365 (M365)

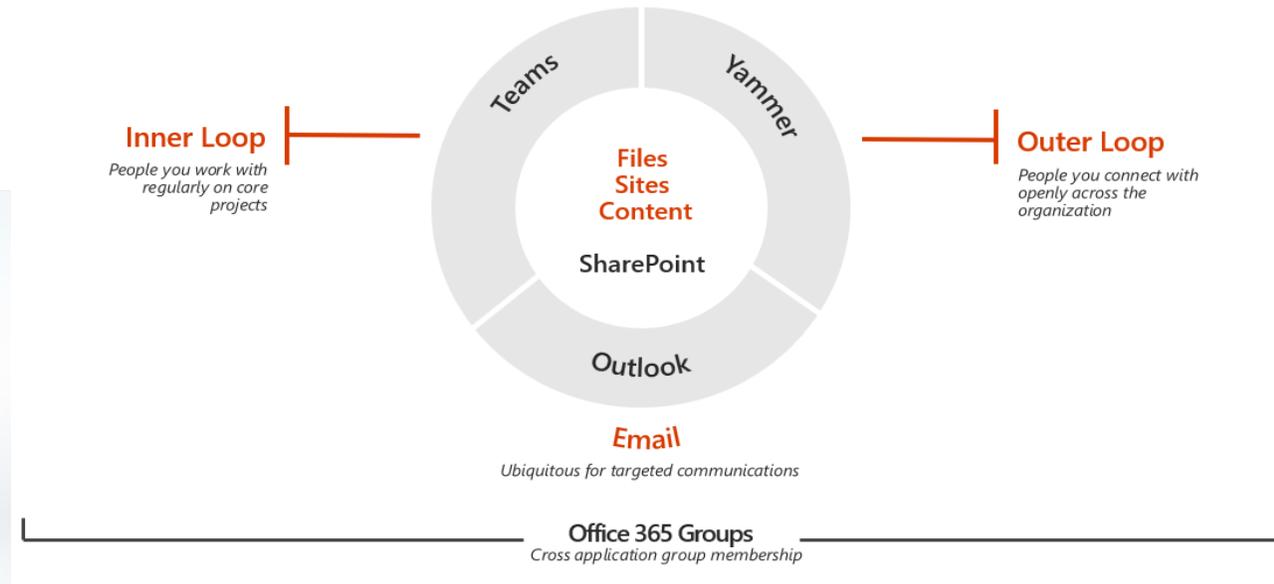
- Microsoft 365 is made up of various applications that meets the needs for your company a holistic solution.
- It includes Outlook for email and calendars
- SharePoint for intranet, content management and collaboration
- Yammer to connect people across your organization
- Office Apps for co-authoring and online access to Microsoft Office Applications like Word, Excel, and PowerPoint
- And Teams which act as the hub for teamwork by combining the features of the other applications mentioned
- All these applications as part of Microsoft 365 is built on services such as Office 365 Groups, Microsoft Graph and Security and Compliance

Azure Services

- Identity Management - Login from multiple sources
- Information Protection and Data Loss Prevention
- Cognitive Services for Digital Content
 - Text - Automated smart tagging and search
 - Video - Picture tagging and meta data
 - Audio - Automated speech to text, transcripts

Microsoft 365 Teamwork

- With Microsoft 365 you can start a conversation from different applications such as:
- Teams for project based work
- Yammer for unstructured communication
- Outlook for targeted communication
- And SharePoint for content management and structure communication
- And all of these uses Office 365 Groups



Why is Moving to the Cloud a Good Idea?

Migration to a cloud-based records management system could significantly decrease the number of future system migrations.

- Reduce large organizational disruptions
- Reduce the cost of migration projects – especially “Big Bang” costs
- Lower capital expenditures, reduced need to “keep the fans turning” in the data center
- Provides the opportunity for Continuous Improvement

What's the Catch?

Migration to a cloud-based records management system, if it's done right, will Change the way you work – and that's not always easy.

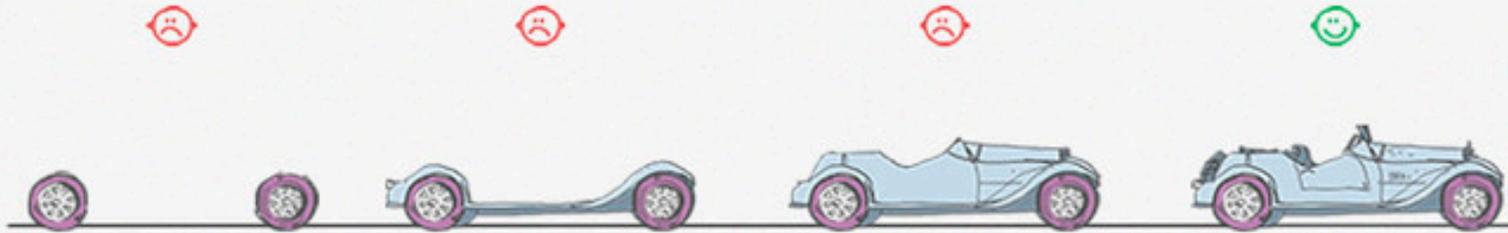
- Continuous Improvement means Continuous Change – that's good right? (Facebook, Phone Apps, Games, Web Platforms like Hulu)
- Do you have a VP of Organizational Change? If not should you?
- When do we clean it all up? Opportunities for ROT?
- Can't hit the “Reset” button
- Expanded Capabilities means expanding Governance umbrella

How do I get there?

- Traditional
 - ROT (Possibly) De-clutter then move
 - Move it all
- Value Based Approach
 - ROT
 - Value Assessment – What is valuable to your business?
 - Data/Electronic Documents are a valuable resource for your company (Perhaps the most valuable)
 - You paid to build or collect it and you continue to pay to manage, protect, store it
 - You can't do business without it (Operations, Compliance etc)
 - You gain efficiency or revenue from it (Efficient provision of Services and Process Improvement)
 - Staged, Value Based Migration to an MVP

Minimum Viable Product

Not like this...



Instead like this!



Intro Summary

- Organizations are moving to the Cloud for a lot of reasons and doing it rapidly – It's the largest source of revenue for some of the largest companies in the world
- In most cases it's a collection of separate but connected services
- The services are continuously improving and changing
- The services support the Digital Workplace and Workers
- The migration to the cloud WILL change the way you work
- Value Based Migration into the proper place in the System Ecosystem



Interesting Part



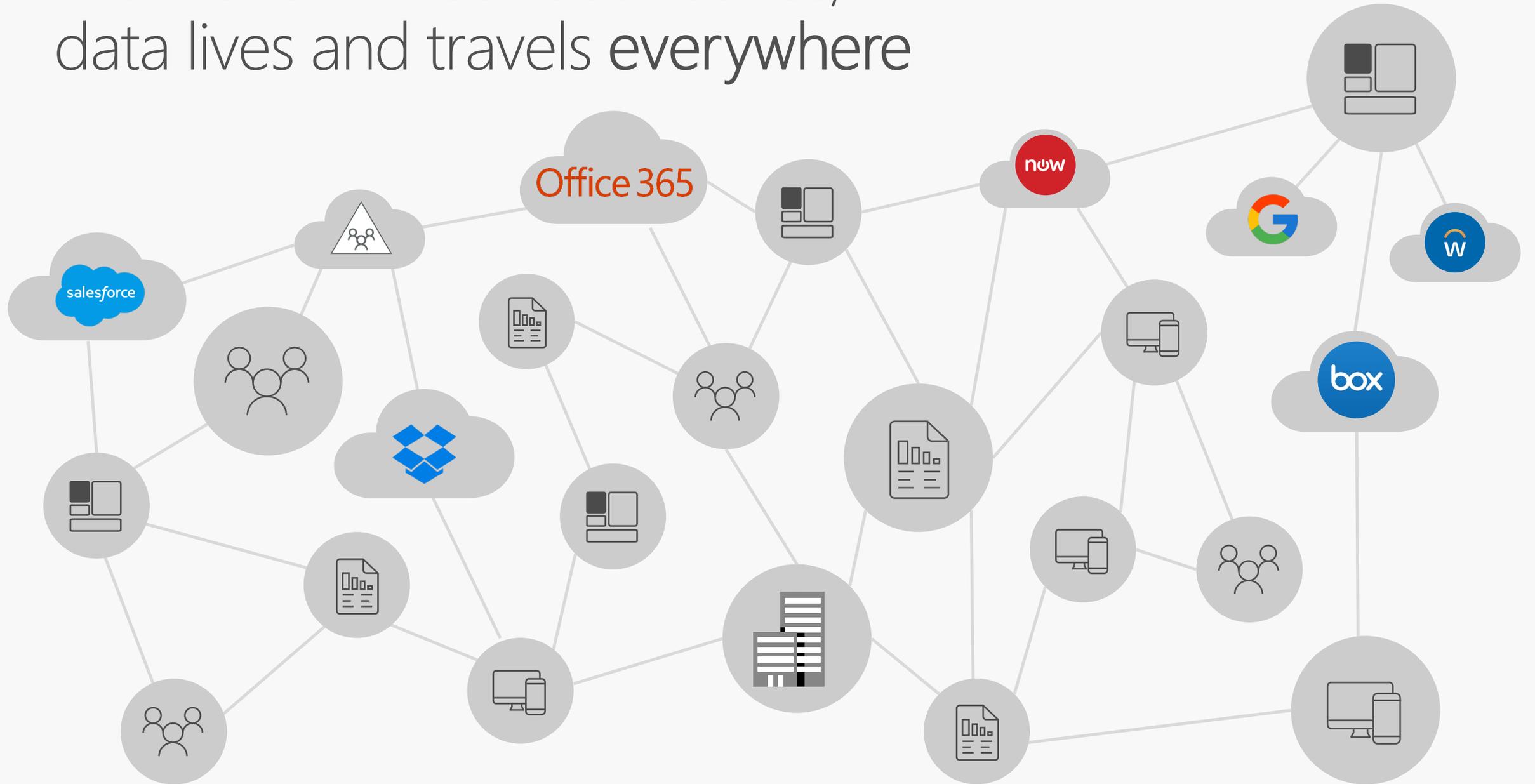
SharePoint and...New Cloud Functionality



Sensitivity Labels



In a world without boundaries,
data lives and travels everywhere

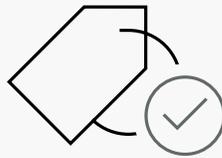


Microsoft Information Protection

Protect your sensitive data – wherever it lives or travels



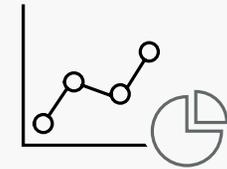
Discover



Classify

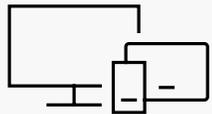


Protect

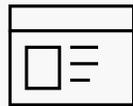


Monitor

Across



Devices



Apps



Cloud services



On-premises

Microsoft information protection solutions

AZURE INFORMATION PROTECTION

Classify, label & protect files – beyond Office 365, including on-premises & hybrid

MICROSOFT CLOUD APP SECURITY

Visibility into 15k+ cloud apps, data access & usage, potential abuse

OFFICE 365 DATA LOSS PREVENTION

Prevent data loss across Exchange Online, SharePoint Online, OneDrive for Business

OFFICE 365 MESSAGE ENCRYPTION

Send encrypted emails in Office 365 to anyone inside or outside of the company

WINDOWS INFORMATION PROTECTION

Separate personal vs. work data on Windows 10 devices, prevent work data from traveling to non-work locations

OFFICE 365 ADVANCED DATA GOVERNANCE

Apply retention and deletion policies to sensitive and important data in Office 365

MICROSOFT INFORMATION PROTECTION

Discover | Classify | Protect | Monitor

CONDITIONAL ACCESS

Control access to files based on policy, such as identity, machine configuration, geo location

OFFICE 365 APPS

Protect sensitive information while working in Excel, Word, PowerPoint, Outlook

SHAREPOINT & GROUPS

Protect files in libraries and lists

AZURE SECURITY CENTER INFORMATION PROTECTION

Classify & label sensitive structured data in Azure SQL, SQL Server and other Azure repositories

SDK FOR PARTNER ECOSYSTEM & ISVs

Enable ISVs to consume labels, apply protection

ADOBE PDFs

Natively view and protect PDFs on Adobe Acrobat

Information Protection & Governance

Comprehensive policies to protect and govern your most important data – throughout its lifecycle

Unified approach to discover, classify & label

Automatically apply policy-based actions

Proactive monitoring to identify risks

Broad coverage across locations

Data growing at exponential rate



Unified approach



Discover



Classify



Label

Apply label

Sensitivity

- Encryption
- Restrict Access
- Watermark
- Header/Footer



Retention

- Retention
- Deletion
- Records Management
- Archiving



Monitor

- Sensitive data discovery
- Data at risk
- Policy violations
- Policy recommendations
- Proactive alerts



Devices



Apps



Cloud services



On-premises



ISVs, 3rd-party



What is a sensitivity label?

Tag that is **customizable**,
in **cleartext**,
and **persistent**.

It becomes the basis for applying and enforcing data protection policies.



In files and emails, the label is persisted as document metadata



In SharePoint Online, the label is persisted as container metadata





Demo – Sensitivity Labels





Retention Labels



EDMS

- Conversion of paper documents to electronic files.
- Reduction in physical space for storage of physical documents.
- Eliminate use of paper forms and automate processes - by defining metadata fields for the digital file, information on the document itself becomes usable data
- Automatic workflow, escalation, and e-authorization are now possible for processes
- Increased protection and document security
- Document accountability
- Searchability and inter-relationship between documents
- Document information analysis capabilities

SharePoint as EDMS

- Content Management Tool
- Auditing capabilities
- Sharing capabilities – internal and external
- Information Rights Management
- Document Management Capabilities:
 - Drag and drop documents – to libraries and one drive
 - Document previews, open/edit documents on browser or app and work using commands and contextual menus
 - Share and follow documents
 - Allows multiple hierarchies/folders
 - Advanced Metadata Support
 - Versioning / Check-in check-out of files
 - Reusable columns/components – using Content types and Site Columns

Records

- Electronic or physical entity
- Organizationally important
- Requires to be retained for specific period of time – For legal, business or regulatory purposes
- A record can't be modified or deleted.
- Records are finally disposed of after their stated lifetime is past.
- Example :- Contract Record – retain for 5 years and then trigger disposition review

Records Management



Retention Policies



eDiscovery



Physical Files

Records Management

Legal Holds



Electronic Files

Audit Trail



Disposition of Records

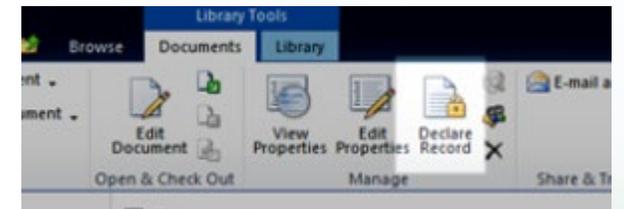
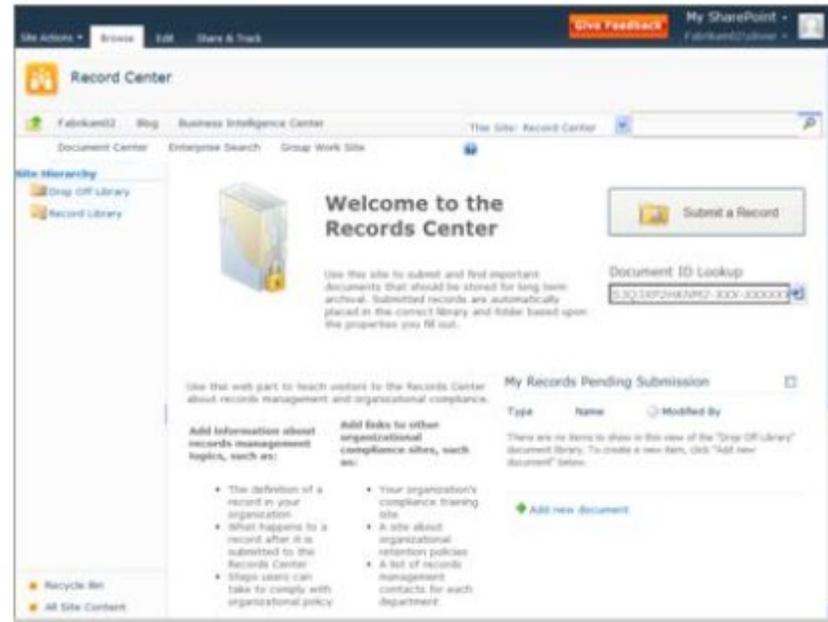


Data governance challenges

- 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, not to expose their organizations to unwanted risks without proactive data retention policies.
- 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

SharePoint for Records Management - Classic

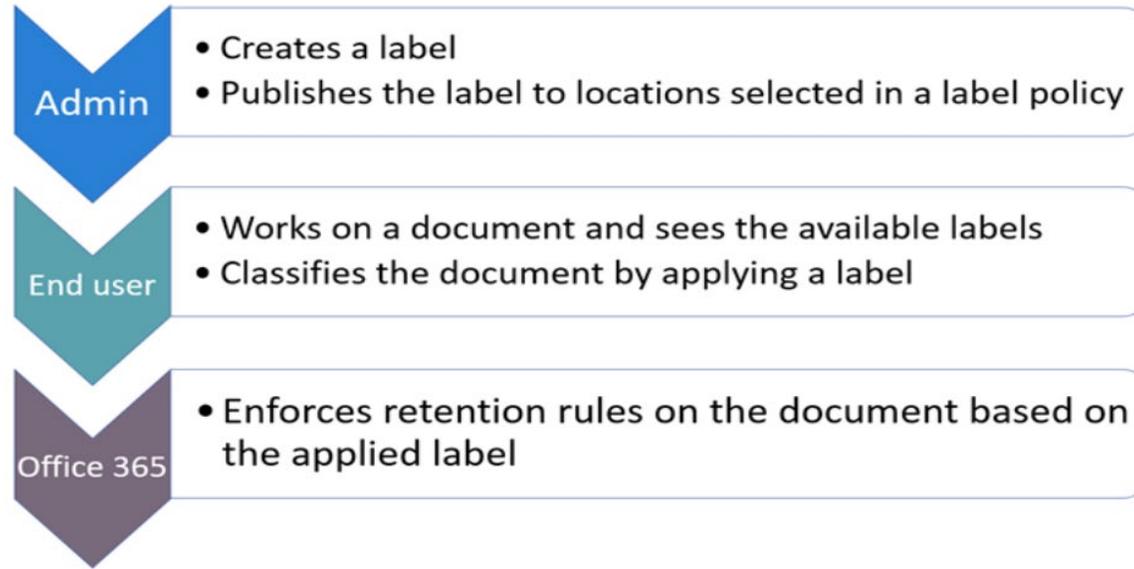
- Records Center Site
- In Place Records Management
- Document ID
- Managed Metadata Service
- Site Collection Auditing
- Holds and eDiscovery
- Document Sets
- Site Compliance



Labels

- Record Managers or IT Admins who best understand their business and employees, define a minimal set of simple label options that information workers can use
- Information worker chooses the right label associated with their content (IW no longer needs to know about data policies or governance associated with label)
- Labels span across – SharePoint, One Drive, Outlook, Exchange
- Record Managers or IT Admins can define the trigger condition for the label and the respective outcome (retention, disposition etc.)
- Labels can be applied manually by the people in your organization or can be applied to content automatically.
- Automatic Label feature :-
 - Specific types of sensitive information – SharePoint and OneDrive
 - Specific keywords that match a query – Exchange, SharePoint, OneDrive and Office 365 Groups
- The ability to apply labels to content automatically is important because:
 - You don't need to train your users on all of your classifications.
 - You don't need to rely on users to classify all content correctly.
 - Users no longer need to know about data governance policies – they can instead focus on their work.

Labels



- Records Management can be enabled via Labels for both emails and documents.
- Labels can be used to classify content as a record. When this happens, the label can't be changed or removed, and the content can't be edited or deleted.
- Making labels available to people in your organization so that they can classify content is a two-step process: first you create the labels, and then you publish them to the locations you choose. When you publish labels, a label policy gets created.
- If you publish labels to SharePoint or OneDrive, it can take one day for those labels to appear for end users. In addition, if you publish labels to Exchange, it can take 7 days for those labels to appear for end users, and the mailbox needs to contain at least 10 MB of data.

Labels

- Labels enforce retention
 - Trigger a disposition review at the end of the retention period, so that SharePoint and OneDrive documents must be reviewed before they can be deleted
 - Start the retention period from when the content was labeled, instead of the age of the content or when it was last modified.

Label settings

Retention ⓘ
 On

When this label is applied to content...

Retain the content ⓘ

For this long... 7 years

Do you want us to delete it after this time?

Delete the content automatically. ⓘ

Trigger a disposition review. ⓘ

Nothing. Leave the content as is

Don't retain the content. Just delete it if it's older than ⓘ

1 years

Retain or delete the content based on

when it was created

when it was created

when it was last modified

when it was labeled

Label classification

Use label to classify content as a "Record" ⓘ

Note: This option is available in a label but not a retention policy.

Labels

- Labels can declare an item is labeled as a record and hence:
 - The item can't be permanently deleted.
 - The item can't be edited.
 - The label can't be changed.
 - The label can't be removed.
- Records and folders
 - You can apply a label to a folder in Exchange, SharePoint, or OneDrive. If a folder is labeled as a record, and you move an item into the folder, the item is labeled as a record. When you move the item out of the folder, the item will continue to be labeled as a record.



Demo – Retention Labels





Advanced Data Governance



Data Loss Prevention (DLP)

- Sensitive Data Analysis (pre-defined sensitive types)
- Define Policies for Sensitive Data
- Policy tips for end users
- All activity is audited and reported
- Spans across following components of O365
 - Exchange
 - SharePoint Online
 - One drive
- Admin defined Policy Tips

 Test ssn.docx
21.5 KB - A few seconds ago

Test ssn 819760256

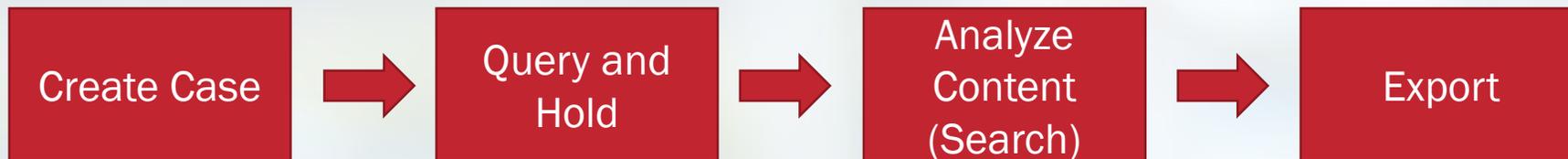
819-00-0006

subject

 This item contains sensitive information.
All recipients must be authorized to
receive this content.
[View policy tip](#)

eDiscovery

- Scalable built in search
- One search for all data types across exchange and SharePoint
- Create cases for eDiscovery
- Search for data types
- Export to review
- Place holds on mailboxes, sites, documents etc.
- Download search results from Exchange, SharePoint ,OneDrive



Audit Logging

- Audit pipeline captures all O365 activity
- Search across content that is person and content centric
- Search and export data
- 90 days of events logged by default
- Predefined list of activities available

Search Clear Results

Activities Show results for all activities

× Clear all to show results for all activities

Search

Date	IP address	User	Activity	Item
File and page activities				
Accessed file	Checked in file		Checked out file	
Copied file	Discarded file checkout		Deleted file	
Deleted file from recycle bin	Deleted file from second-stage recycle bin		Detected malware in file	
Downloaded file	Modified file		Moved file	
Recycled all minor versions of file	Recycled all versions of file		Recycled version of file	
Renamed file	Restored file		Uploaded file	

Final Takeaways

- Cloud Platforms are Secure, Separate and Connected Systems
- New Capabilities are coming all the time (Firehose Effect) – Many systems have a two-week development cycle.
- Organizational Change will be a constant fact-of-life and CRITICAL for getting user adoption and the ROI you want from your systems
- If you plan correctly for your transition to the Cloud you will have the opportunity to take advantage of the new and emerging capabilities that are offered by Cloud Systems including Analytics, Advanced Workflow, Bots, and Security
- When you move make decisions based on the Business Value of your data. This can have a HUGE impact on:
 - What you move
 - When you move it
 - Where you move it



Questions?



Feel free to email us!



Thank you.

