

# Washington Records and Information Managers (WARIM) Forum Notes

## Wednesday, April 15, 2020

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Carissa Bourdon, Chair, introduced Aaron Cuoio and Jason Beers, WaTech.

### Roundtable

We did a roundtable with attendee's name and what teleworking, Office 365, or other issues they are dealing with right now, hot topics included O365, Teleworking, and other:

#### **Office 365**

- Retention of data/records.
- Team's use and records – Where is the records being stored? How to get rid of transitory chat records?
  - WaTech will share an infographic on where the data lives in O365.
  - You can get rid of individual messages but not sure about the whole chat.
- Transition to O365 extremely fast.
  - Employees are saving records in weird spots as they are not familiar with the software.
- Training – we don't know what we don't know.
  - Training will occur later as we figure out what we need.
- When do I start immersing myself in Office 365 training?
  - Timeline from CIO.
- WaTech O365 training and meetings
  - Getting access to the links, meetings, and training
  - Who is the POC for each meeting?
  - What is the focus for the various meetings?
- How do you use Office 365 software to search?
  - How do you know if it's a user error or a Microsoft issue?
- Shared tenant group decisions
  - Records Officers will need to make decisions so let's do it together
  - Could make workload easier for WaTech

#### **Teleworking**

- Zoom
  - Security issues.
  - Policy for use in state agencies.

- Technology issues with teleworking.
  - Waiting for coworker's laptop to arrive and get configured with VPN access.
- Dealing with Skype.
- Working remotely –
  - Kids are home and don't understand why parents are working.
  - Pets want to be part of team meetings.
- Dual working households' issues –
  - Finding spaces to work.
  - Noise issues.

### **Other issues**

- Working with unique agency's records retention schedule.
- Old databases with important info
  - Repairs needed almost daily.
  - Limit access to prevent issues.
  - Business practice changes.

## WaTech discussion on O365

### **Migration**

- Agencies are choosing different paths for their install, such as using Teams but not Exchange so searching for records becomes an issue.
- Migration will be challenging because the data will be in different locations and employees are also learning new software.
- WaTech is writing admin guides right now on best practices for configuring O365 based on the agency's needs.
- Records Officers should check with their agency's CIO on implementation timeline as well as what version of Office 365 they plan to purchase.

### **Recovery deletion buckets**

- Different apps have different recovery deleted buckets.
- Timeline of recovery deleted buckets -
  - OneDrive: 30 day recovery
  - SharePoint: 93 day recovery
  - Exchange: 30 day recovery for users.
    - After that, they are hidden and purged 14 days later.
    - eDiscovery Admins can find purged items before the 14 days is up.

# Microsoft Teams – Where is the Data?

CHAT	TEAMS	MEETINGS	CALLS
1:1 Chat	Conversations	Join Skype for Business Meeting	Contacts
1:Many Chat	File Tab in Team	Calendar Invite	Voicemail and Transcripts
File Shared in Chat	Wiki	Voice & Video Calls	Call History
1:1 Bot Chat	OneNote	Meeting Recording	Call Summary
	Connector Conversation Posts	Meeting Summary	
	Bot Interactions with Team		

■ Exchange Group Mailbox
 ■ Exchange User Mailbox
 ■ OneDrive
 ■ SharePoint
 ■ Stream

## Searching

- WaTech will work with agencies on configuring labels and permissions for records retention in the shared tenant.
- WaTech is focused on moving the O365 conversation forward with e-discovery and records retention.
- If agencies choose G3 level, they will either will need to staff up or upgrade to G5 version.
  - G3 can search, collect/comply, and export but there are no review features during this process.
    - 80% of public disclosure’s job is review.

## Teams

- Teams, OneDrive, Exchange Online, and SharePoint are linked together.
- Teams has a chat feature.
- Are chats business or transitory records?
- You can either hide or mute the messages in chat, but they still exist.
- Retention policy for Teams
  - Might need a tenant-wide decision.
  - Records in Teams are stored in SharePoint.
  - Owners can delete messages.
- Deletion “buckets”
  - Different apps have different deletion recovery buckets.
  - Microsoft does not back up its data, they rely on these recovery buckets.

## Office 365 Resources

- [Microsoft 365 compliance documentation](#)

- Email [Jason Beers](#) at WaTech if you would like to be on the DA User Group email distribution list.
  - They will be discussing O365 with an emphasis on search.
  - The group meets monthly.
  
- YouTube:
  - Office 365 - Part 1 - eDiscovery Overview  
<https://www.youtube.com/watch?v=RPtgqyRs3Ac>
  - Office 365 - Part 2 - Information Governance  
<https://www.youtube.com/watch?v=EiFry0eg0ac>
  - Office 365 - Part 3 - Litigation Holds  
[https://www.youtube.com/watch?v=DT9zY\\_CfhNo](https://www.youtube.com/watch?v=DT9zY_CfhNo)
  - Office 365 - Part 4 - Collection and Processing  
<https://www.youtube.com/watch?v=QDGAj3sgggs>
  - Office 365 - Part 5 - Search  
<https://www.youtube.com/watch?v=GCL3n29rNgI>
  - Office 365 - Part 6 - Search Part 2  
<https://www.youtube.com/watch?v=CwBYkCowAT0&t>
  - Office 365 - Part 7 - Analytics  
<https://www.youtube.com/watch?v=6is9mMkNwUY>
  
- Tech Talks
  - 4/17/2020 11:00 AM-1:00 PM PDT Microsoft Tech Talks (REMOTE) | Teams: Governance, Security & Compliance [REGISTER FOR 4/17/2020 - Teams](#)
  - 4/22/2020 10:00 AM – 11:30 AM PDT Microsoft Tech Talks (REMOTE) | Implementing Azure Identity Governance [REGISTER FOR 4/22/20 - Azure Identity Governance](#)
  - 4/24/2020 11:00 AM-1:15 PM PDT Microsoft Tech Talks (REMOTE) - Windows Virtual Desktop [REGISTER FOR 4/24/20 - Windows Virtual Desktop](#)
  - 4/24/2020 11:00 AM-12:30 PM PDT Microsoft Tech Talks (REMOTE) | Azure Private Links!!! - Connecting and Protecting IaaS and PaaS workloads [REGISTER FOR 4/24/20 - Azure Private Links](#)
  - 4/24/2020 12:00 PM-1:15 PM PDT Microsoft Tech Talks (REMOTE) | Keep your business running with the Crisis Communications App [REGISTER FOR 4/24/20 - Crisis Communications App](#)
  - 4/30/2020 7:00 AM – 9:15 AM PDT Microsoft Tech Talks (REMOTE) | Keys to Successfully Implementing Azure Identity Governance! [REGISTER FOR 4/30/20 - Azure Identity Governance](#)
  - Please join the [Microsoft Tech Talks Technical Community](#) to hear of upcoming events.
  - Join a [Microsoft Tech Talks Community Meetup Group in your local area](#) to hear about in-person events taking place near you.

## Upcoming Events

Jun 3, 2020	<a href="#"><u>WARIM Forum</u></a>	Olympia, WA
Jul 6, 2020	<a href="#"><u>WARIM Forum</u></a>	Olympia, WA
Sep 8, 2020	<a href="#"><u>WARIM Forum</u></a>	Olympia, WA
Oct 26 – 28, 2020	<a href="#"><u>ARMA Conference</u></a>	Detroit, MI
Nov 10, 2020	<a href="#"><u>WARIM Forum</u></a>	Olympia, WA

*Please note that the [NAGARA Conference](#) for July 7 – 11, 2020, has been cancelled.*