

Records Retention in M365

Overview

- Systematic retention rules for email & peer-to-peer Teams messages
- 3-year state-wide default retention
- Alternate retentions applied via policy
- No direct action by end users

Current Status

- Joint EIS M365/SOS team planning deployment
- Retention policies identified
- Technical process identified
- Resource library in development
- Communications underway

Retention Work

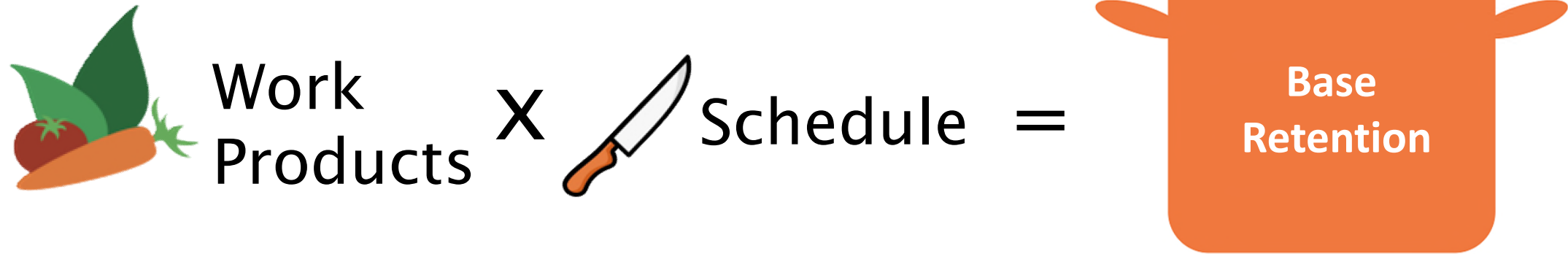
SOS Archives Team

1. Group agencies by readiness
2. Work on special schedules to update
3. Document procedures to identify roles and retentions
4. Train and advise agency records teams

Agency Records Team*

1. Review agency schedules vs business roles
2. Group positions with similar retentions
3. Associate a retention with each employee group (3, 5, 7, 10, 20, perm)

Role-based Retention



Compare unit functions with retention schedule

Longest likely retention = base retention for that work unit

Examples

Agency Accounting Unit

- Schedule: 4 to 6 years retention.
- M365 retention group: 7 years

Agency Training Specialists

Schedule: 2 or 5 years

M365 retention group: 5 years

Senior leadership
roles may differ
from their units
depending on
responsibilities

Technical Work

Enterprise level (EIS and SOS Archives)

1. Apply default 3-year policy
2. Create 5, 7, 10, 20, Permanent policies

Agency level

1. Agency IT applies metadata tag to field in user profiles
2. Add step to position change workflow

Communication plan

- Presentations to targeted groups
 - CIOC, ABSD, Records Officers, etc.
- Open-invite “roadshows” to lay out broad plan
 - 2/7, 2/15, 2/23, 2/28
- Technical meetings for IT staff
 - Beginning late Feb/ early March
- Direct consultations with agencies
 - Beginning in March

Timelines and Adjustments

- Target for majority completion: 7/1/24
- Agencies remaining beyond this date will be held until process completed
 - Archives team will work with agencies to identify alternative targets
- Future efforts will target file retention in Teams/Sharepoint/Onedrive

Open Discussion

Questions? Email:

Records.management@sos.oregon.gov

Resource site:

<https://sos.oregon.gov/archives/Pages/M365Retention.aspx>