

OFFICE 365 ONEDRIVE FOR BUSINESS ONBOARDING AND OFFBOARDING GUIDE

VERSION 2.2



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OFFICE 365 ONEDRIVE FOR BUSINESS IMPLEMENTATION GUIDE

PURPOSE OF ONEDRIVE FOR BUSINESS GUIDE

The OneDrive for Business guide provides information for an Agency's technical staff to understand how user access to OneDrive for Business is granted (Onboarding) and removed (Offboarding). It also provides information regarding the applicable security policy and data loss prevention process, including steps to retain files for users transferring to another State of Ohio entity or leaving employment of the State of Ohio.

ONEDRIVE FOR BUSINESS OVERVIEW

OneDrive for Business is a place to [store, sync, and share files your work files](#). As part of Office 365, OneDrive for Business allows end users to update and share files and work with others at the same time. For more information on all Office 365 services offered at the State of Ohio, refer to the Service Description in the next section.

[OneDrive for Business is different from OneDrive](#), which is intended for personal storage separate from the workplace. [OneDrive for Business is also different from the Office 365 team site](#), which is intended for storing project-related documents.

Agency IT administrators, or those with access to the FIM portal may enable Office 365 OneDrive for Business for the agency's users. Document retention is managed by the agency's user's manager as part of the general user offboarding process.

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OFFICE 365

Service Description

The Office 365 Service provides customers the ability to use E-Mail, the Office Suite, Instant Messaging, Online Meetings and Web Conferencing, and file storage all from the Cloud allowing the customer to access services virtually anytime and from anywhere as well as E-Mail Archiving and eDiscovery services.

The Office 365 Service provides Licensing and Support for E-Mail, the Office Suite (Outlook, Word, Excel, PowerPoint, Publisher, Skype for Business and OneNote) SharePoint Services, and One Drive for Business. Please note that the Office Suite may require Agency deployment or agency/end user installation as well as Patch Management and distribution.

- Email in the Microsoft Cloud
- Office 365 Professional Plus
- Skype for Business
- SharePoint
- One Drive for Business

Customers of this service may also be interested in:

- Enterprise Fax
- Airwatch
- MOBI
- Ohio One Network

Customer Benefits

- **Efficiency** - This service is delivered in a manner that requires fewer resources (i.e. cost, labor, time, etc.) to meet the operational demands of the customer.
- **Support** - Service support is provided by OIT staff that is skilled and experienced in planning and provisioning, as well as maintaining and troubleshooting the service.

OIT Provides

- Facilitation of Service Provisioning and Implementation
- Incident Resolution Services via the Customer Service Center
- Office 365 Licensing
- Routine maintenance

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Maintenance Schedule

Office 365 maintenance occurs in the Cloud Service without downtime for the customer. On Premise Office deployments will require Agency based Patch Management

Incident Response & Resolution

As a primary Service, Office 365 Support Staff is available 24 x 7 for both Incident Reporting and Resolution. Office 365 Staff will respond to the customer within 30 minutes of a reported Incident. Customer involvement is essential to resolving issues; therefore, the customer will need to provide a Technical Contact resource. With collaboration from the customer and vendor resources, staff will commit to resolve the incident within 4 hours.

Note: The customer is responsible for providing end user support for this Service.

Service Objectives

| Category | Evaluation Criteria | Target |
|-------------------------|--|--------|
| Availability | Office 365 uptime | 99% |
| Incident Responsiveness | Office 365 Support Staff responds to the customer (i.e. acknowledges and confirms receipt of incident ticket) within 30 minutes. | 100% |
| Incident Resolution | Office 365 Support Staff resolves incident within 4 hours. | 75% |

Customer Requirements

- A PC or other mail-capable device
- Maintain agency and service contact lists via the IT Enterprise Services portal at: <http://itenterprise.ohio.gov>.
- Outlook client at the desktop (support and maintenance)
- Place service order via the OIT Enterprise Service Catalog
- Provide DAS OIT with a valid Billing Number

Additional Information

For more information on this service or the Service Level Agreement, contact the Customer Service Center at CSC@ohio.gov.

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ONEDRIVE FOR BUSINESS SECURITY

OneDrive for Business use is governed by State Policy per below.

OHIO ADMINISTRATIVE POLICY IT-04

2.4 Only state approved cloud storage solutions, Microsoft OneDrive for Business and SharePoint Online, shall be used to store, share and manage information. When using state cloud storage solutions, the following restrictions apply:

2.4.1 Data Storage: Only data related to state business shall be stored in state cloud storage solutions. Personal data shall not be stored in state cloud storage solutions.

2.4.2 Sensitive Data Storage: Sensitive data shall not be stored in Microsoft OneDrive for Business. Sensitive data storage is permitted in SharePoint Online if rights management and data encryption is implemented by the agency. Data encryption shall be in alignment with the requirements outlined in Ohio IT Bulletin ITB-2007.02, "Data Encryption and Securing Sensitive Data."

2.4.2.1 Any other cloud storage solutions shall be submitted to the Department of Administrative Services (DAS) Office of Information Security and Privacy for evaluation and approval prior to being used to store sensitive data.

DATA LOSS PREVENTION (DLP)

The DAS Security and Privacy office has started the process to implement SkyHigh which is a CASB (Cloud Access Security Base) tool. SkyHigh will be used to implement DLP policies preventing agency users from saving/uploading sensitive data in the cloud. Currently there are policies already in production to notify the users that PII data such as (SSN, Credit Card and Driver's License Numbers) are not to be saved in OneDrive and SharePoint sites. As the policies are fine-tuned, DAS Security and Privacy will be enforcing the blocking mechanism to prevent saving sensitive data in the cloud. More health and tax-related policies will be added in the future to prevent sensitive data from being saved in the cloud.

Agencies are asked to contact the DAS Security and Privacy group to discuss any specific needs regarding sensitive data in the cloud. DAS Security and Privacy will work with agencies to create policies focused on their needs.

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ENABLING ONEDRIVE FOR BUSINESS

PREREQUISITES

Before using OneDrive for Business, it is recommended that Office version 2013 or later be deployed to provide users with the best experience. Documents may then be created and stored in OneDrive for Business using the Office applications. If Office ProPlus or Office Online is not installed, users will be prompted to download Office when attempting access to OneDrive for Business.

PILOTING ONEDRIVE FOR BUSINESS

Prior to enabling OneDrive for Business throughout an agency, a pilot or small group of users may test the capabilities to become familiar with how it works in the agency environment, and to create any desired training and communication for users.

Pilot users must be given the appropriate permissions by an Agency IT Administrator to use OneDrive for Business. (OIT DAS will provide the access for all remaining users on the scheduled rollout date.) For the pilot, the Agency IT Administrator will perform the following two step:

- Check the 'Enable OneDrive for Business' box for each user in the FIM Portal.

Once this action has been taken, the user may access OneDrive for Business.

FULL AGENCY ACCESS TO ONEDRIVE FOR BUSINESS

Agencies have been scheduled to receive OneDrive for Business on a specific date. DAS OIT will enable OneDrive for Business for all remaining users on that date, and no action is needed by the agency (aside from prior user communication and training).

Following the specified agency rollout date, any individual becoming employed with the agency is automatically granted access to OneDrive for Business once a mailbox has been created for them. No further action is needed by the agency.

If business needs require removal of OneDrive access for an individual or individuals, a request must be sent to [CSC](#). The agency will be notified once access has been removed.

OFF-BOARDING USERS

There are three situations when OneDrive for Business access is removed for an individual:

- 1) Leaving the State of Ohio
- 2) Leaving the agency and going to another agency (or State of Ohio entity)
- 3) Who currently has OneDrive for Business access that must be removed for other business reasons as determined by the agency

In all three examples above, the user's OneDrive site is deleted. The first two examples, leaving State of Ohio employment or transferring to another State of Ohio entity, the agency receives notice from HR. OIT DAS is notified automatically via the HR system, OAKS, or via a request submitted by the agency via Service Now or the [CSC](#).

Before a OneDrive site is deleted, notices at predetermined intervals are sent to the user's manager with a link to the OneDrive site and instructing them to move any remaining files to another location if they are to be retained. After 30 days, the documents and site are no longer accessible. Details on this process follow.

User Transfer

When a user transfers to another State of Ohio entity, their OneDrive account is manually deleted from the original agency by DAS OIT before being setup in the new agency. The OAKS system provides notification to the DAS OIT that an individual is transferring between agencies. This may also be requested by the agency via a Service Now ticket. Once notification has been received, DAS OIT removes the account from the agency.

User Termination

If the individual is leaving the State of Ohio, the agency must disable the mailbox through the FIM portal. The mailbox is automatically removed from the system provided it has been disabled and is inactive. These actions activate the OneDrive site removal process.

The user's manager receives an email notification stating the OneDrive site will be removed in 30 days, and site access has been granted to the manager. All documents in the site must be moved to a different location if they are to be retained.

OneDrive for Business Site Removal Notification

A 30-day notification process begins once the OneDrive account is removed from Office 365. The account removal process is transparent to the agency, and only a user's manager may access the documents.

Emails are sent to the user's manager immediately and 27 days later with a link to the user's OneDrive site if any files remain in the site. The emails state that remaining files should be moved to another location if they are to be retained. After the full 30 days has elapsed, files and the account are deleted from the user's profile.

Note: Agency or OIT DAS must disable email account in FIM portal to initiate OneDrive notices.

Document Retention

It is recommended that a user's manager preserve business documents or files created by the former employee. Learn more about individual document storage at "[What is OneDrive for Business](#)".

- To gain access to a former employee's OneDrive for Business documents; the user's manager must:
 - Change the user's password for Office 365
 - Sign in to Office 365 as that user
- Then move the files to an easily accessible location

EDISCOVERY

To place a OneDrive site on hold as part of an eDiscovery case, a request must be sent to [Customer Service Center \(CSC\)](#). An email message is sent as part of the account deletion process; however, the site will remain on hold until the hold is removed.

LEGAL HOLDS

If a 'litigation hold', or a hold for legal discovery purposes only is needed, a request must be sent to the [Customer Service Center \(CSC\)](#).

REFERENCES

The [OIT Office 365 Site](#) is a SharePoint site providing support for end users, IT administrators, and agencies; and may be accessed directly by State of Ohio agency personnel. It is intended as a source of support for end users, IT administrators, and agencies who are planning to use or using Office 365 services. It includes information that follows.

IT Admin Support

The OneDrive for Business Implementation Guide is available in IT Admin section of the [OIT Office 365 Site](#). Also included are the most current version of Office 365 ProPlus, a reference guide for deploying the Office service, and a link to FIM portal training resources.

Migration

Office 365 services rollout schedules and rollout status are stored in the Migration section. This includes the latest version of the OneDrive implementation schedule, and graphs depicting agency interest and usage of OneDrive for Business and other Office 365 services.

End User References

End User Office 365 training resources are included in this section of the [OIT Office 365 Site](#). The State of Ohio contracted with a provider of online video training called Brainstorm to help end users learn how to use Office 365 services. Instructions on how to access the training may be found on the SharePoint site.

There are two types of training available online through Brainstorm as follows:

- QuickHelp includes videos less than 5 minutes in duration for reminders on how to perform certain tasks, such as uploading documents to OneDrive for Business.
- QuickCasts include videos generally up to 30 minutes in duration focused on features and functions for an application, such as OneDrive for Business or OneNote.

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Scheduled webinars generally an hour in duration are led by Brainstorm as well, and announced in the IT Optimization newsletter as they become available, including instructions for registration.

Note: The source of all Brainstorm training content is Microsoft. Brainstorm chooses the delivery method, but the actual content is endorsed by Microsoft.

Training resources offered directly by Microsoft for Office 365 services are also provided in this section. These are accessible on the Internet, and include written training, online tutorials, and QuickStart guides that may be downloaded and printed.