# ACTIVENAV
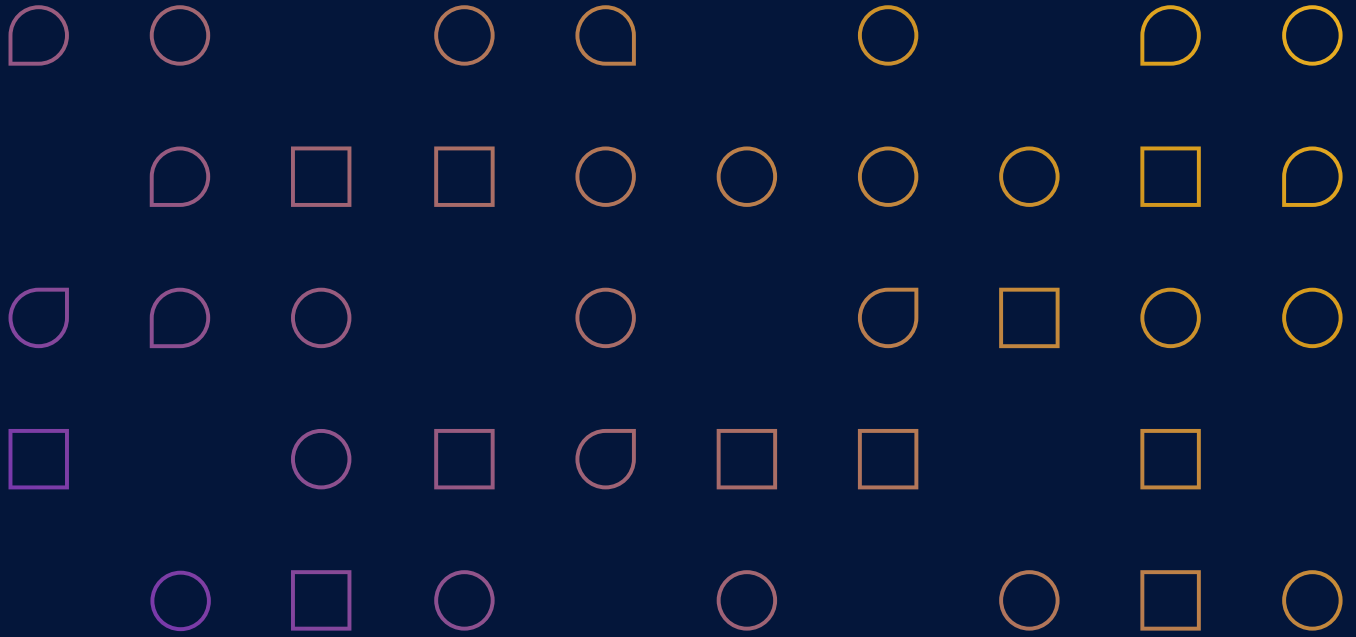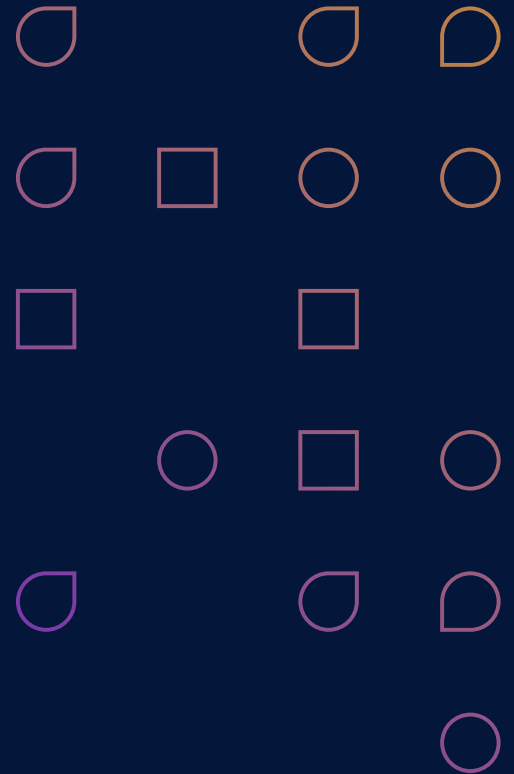
# ActiveNav and Microsoft 365

*Staying Secure and in Control of Your User-Generated Data*

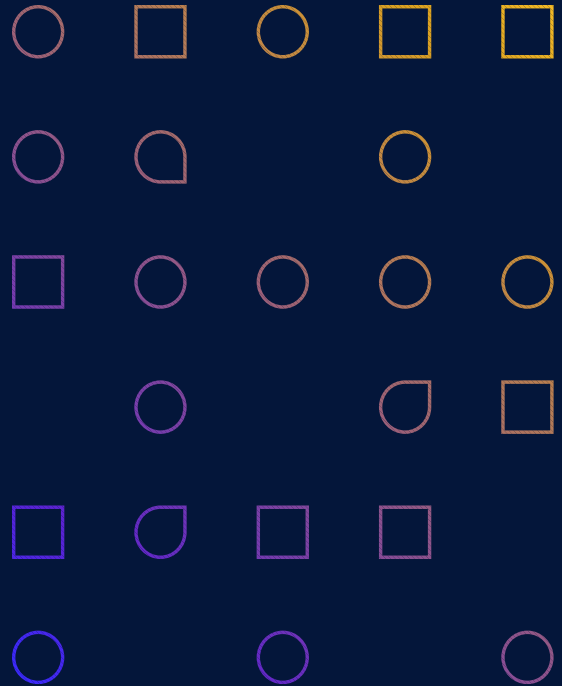# Table of Contents

# Key Takeaways:

- Maximize the benefits of Microsoft 365

- Capitalize on Microsoft's latest AI-powered innovations

- Remain secure, compliant and in control of your data throughout its lifecycle

## Executive Summary

Microsoft 365 (M365) has become the cornerstone of many organizations' strategy for "digital transformation" - providing new levels of business agility and supporting today's more mobile and collaborative workforce. As a member of the Microsoft Intelligent Security Association (MISA), ActiveNav is at the forefront of ensuring that enterprise clients can successfully embrace M365 while at the same time boosting their data governance and compliance posture in key areas.

Using ActiveNav's Governance™ solution together with your Microsoft 365 platform gives you significant advantages.

### A business-centric view of your data estate

Ensure full coverage of your data estate, identifying data from a holistic business perspective rather than from just an IT perspective

### Data identification tailored to your business

Build a flexible model for identifying the data that is most important to your business and avoid the constraints of "black box" rules

### Efficient data migration

Cleanse your legacy data, increase its business value and ensure the correct security context is maintained

### Broader enforcement of security policies

Extend sensitivity labeling deeper into your data estate, incorporating labeling within your data discovery processes and validating the accuracy of manual file labeling

### Leverage the latest information management innovations

Take advantage of Microsoft's latest AI-powered innovations for information management and ensure machine learning models are built using the cleanest possible training data

# Digital Transformation

Adopting a cloud-based solution such as Microsoft 365 is not just about a change to your IT infrastructure - it's about transforming your business to work in new ways and with greater agility.

Every digital transformation will be different for each organization; requiring a true understanding of the data that drives your business - what it's used for, how critical it is, how sensitive it is, where it resides and what lifecycle it follows. To achieve a successful transformation requires new levels of visibility and control over your data that will be unfamiliar to many organizations.  While this process may seem daunting, with the right tools and processes it can be achievable.

ActiveNav's Governance solution supports you on your digital transformation journey by proactively monitoring the quality and compliance of your content, enforcing retention policies and addressing legal and regulatory requirements with automated, defensible workflows.

# Microsoft 365

Microsoft 365 is the latest evolution of Office 365, delivering value that now extends substantially beyond the original Office productivity suite to form a comprehensive mobile and collaborative platform that incorporates a framework for information governance. Despite the dominant position Office holds within enterprises worldwide, Microsoft fosters a healthy ecosystem of Independent Software Vendors (ISVs) who ensure that Microsoft's products can be enhanced to meet the demands of organizations of all types and sizes.

# Microsoft Security and Compliance

Microsoft 365 encompasses many solutions with an array of different licensing options. This configuration complexity extends to the various data security solutions that are now available within the M365 platform, with many grouped under the umbrella title of Microsoft 365 Compliance.

Microsoft Information Protection (MIP) is the element of this compliance stack that provides basic data identification using pre-built sensitive information categories and trainable classifiers. MIP also provides sensitivity labels that can be applied as embedded file metadata to reflect data classification policies. Support for MIP sensitivity labeling is built into the core M365 productivity apps; however to access more advanced labeling features, or use a standalone version of Office, it also requires an installation of the Azure Information Protection (AIP) universal labeling client. Data protection is provided in the form of rights management (RMS), data loss prevention (DLP) and cloud access security broker (CASB) capabilities, the latter known as Microsoft Cloud App Security (MCAS). In addition, Microsoft Exchange and SharePoint are also "aware" of MIP sensitivity labels and use these to determine the security context of data in order to enforce relevant policies.

# Microsoft and ActiveNav

Microsoft has long recognized the value and contribution of its ISV partners that enhance Microsoft's foundational offerings to ensure a precise fit with the business needs of their customers. ActiveNav is a long-standing Gold ISV partner of Microsoft and also a member of the more recently formed Microsoft Intelligent Security Association (MISA). MISA is the pinnacle of this certification and is open only by invitation to select ISV partners who can demonstrate clear added value to the Microsoft security stack.

As a MISA partner, ActiveNav has full access to the MIP Software Development Kit (SDK) to provide a close coupling with Microsoft's compliance stack. This coupling includes trusted API-level access that allows, for example, ActiveNav to read MIP sensitivity labels when performing analytics tasks and to apply relevant labels as part of any mitigation actions.

"Members of the Microsoft Intelligent Security Association, like ActiveNav, offer solutions that help defend against a world of increasingly sophisticated, fast-moving threats. The integration of ActiveNav with Microsoft Information Protection allows us to work together to help customers navigate the security landscape."

- **Alym Rayani**, *General Manager for Microsoft Compliance at Microsoft Corp.*

# The ActiveNav Advantage

Using ActiveNav together with your Microsoft 365 platform gives you significant advantages…

# 1 A Business-Centric View

Even if your ultimate goal is to drive all your data to M365, many organizations will have data in repositories that cannot easily be migrated - for example, data housed outside the Microsoft environment. For many organizations who adopt M365, a hybrid IT infrastructure is not just a transitional state but forms part of a longer-term strategy that helps mitigate the risks from over-dependence on one platform or provider.

Keeping a broad view across your data estate helps you avoid becoming too narrowly-focused on the information held within the M365 platform and reduces the risk of leaving gaps in your compliance position. ActiveNav ensure's you have a unified view across your entire data estate, even into data repositories outside of the traditional Microsoft platforms.

ActiveNav further enhances this unified viewpoint by offering a business-centric means to interrogate the data through creating "areas of interest" that can span all your data stores. An area of interest might relate to a particular business function - for example, to allow you to identify all contracts that relate to your marketing function.

Using a business-centric approach to analyzing your data avoids the process of data identification being constrained and impeded by the IT perspective that typically concentrates more on individual repositories.

## Key Takeaways

- Ensure full coverage of your data estate
- Identify data from a business ownership perspective - not just an IT perspective

# 2 Tailored Data Identification

Data identification lies at the heart of any discovery process and defines the attributes and characteristics that when combined together allow you to determine the exact nature and purpose of each file - deepening your knowledge from the superficial "it's a spreadsheet" to the more meaningful "it's a completed sales order form."

Best in class data governance tools offer out-of-the-box rules for identifying types of content that are common in privacy compliance scenarios. For example, these may include identifying credit card numbers and social security numbers. Such rules may be based upon matching simple patterns or regular expressions, or they may incorporate other supporting evidence. While M365 includes such simple tools to help identify the common types of content, the ability to adjust and tune the underlying rules is strictly limited - which creates a problem when you find these generic rules don't meet the specific needs of your organization.

ActiveNav provides comprehensive out-of-the-box rules for data identification, but more importantly, you can easily review, modify and extend these rules at the most granular level to make them really work for your organization. This flexibility allows you to build sophisticated and tailored rules that reflect both industry best practice and your business-specific policies. These customizable rules can be based on a combination of document properties, content themes, machine learning, pattern matching and/or keywords. This ability to fine tune rules avoids the frustration that otherwise results from the inevitable false positive outcomes that arise from using generic "black box" rule sets.

ActiveNav provides a highly efficient engine for data identification, allowing you to tune the depth of analysis to suit each particular governance task. For example, analysis can be based upon attributes of the data file, such as age, size, location, file type, ownership or other attributes known to the repository. This level of analysis does not require files to be opened for analysis and particularly suits data cleansing tasks where it's sufficient to target MP3 files for deletion or twenty-year old files.

Where a deeper identification is required, ActiveNav can analyze the content of each file, looking for words and patterns in the text that will identify the exact type of document (e.g., is it a purchase order or medical report?) and what kind of information it contains (e.g., does it contain Personally Identifiable Information or high-value Intellectual Property?). Using these flexible, multi-level rules, you can build a data identification model that's specific to your business.

## Key Takeaways

- Build a data identification model specific to your business
- Avoid being constrained by rigid "black box" rule sets
- Create efficient analysis tasks tailored to specific governance objectives

# 3 An Efficient Data Migration Strategy

One of the attractions of M365 is the ability to relocate your user-generated data to the cloud to provide a cost-effective approach to data storage that can flex with your business needs. The challenge is to identify what data actually needs to be moved, as significant proportions of your existing data universe will be Redundant, Obsolete or Trivial (ROT), including documents that are duplicated, expired or have no business relevance. A data cleansing exercise is vital to avoid moving unwanted baggage to the cloud.  The best time to perform that exercise is before the data migration process, rather than attempting the cleansing exercise retrospectively.

As well as cleansing your data estate to support a more efficient data migration strategy, ActiveNav can also augment the remaining data by identifying its sensitivity and business value using metadata and tags, including applying MIP Sensitivity Labels. You can choose to augment your data in situ before moving it to the cloud or perform this transformation as part of the migration process.

Identifying the true nature of your data also allows you to reorganize files and make your important information easier to find and manage, improving the efficiency and effectiveness of your whole data management approach.

Fully identifying the characteristics of your data at the earliest stage ensures that no data enters the M365 environment without a proper security context.

## Key Takeaways

- Migrate only the data you need - leave the ROT behind
- Increase the business value of migrated data
- Automatically add business and security insights to migrated data
- Establish MIP security context prior to migration and reduce exposure

"Across our Canadian environment, I've found between 48% and 52% ROT (redundant, obsolete and trivial) data. A lot of this ROT are duplicate files... ActiveNav has provided significant value by being able to identify and remediate these duplicates."

*- **Erin Delorme**, Information Management Specialist for Plains Midstream Canada*

Learn how Plains Midstream Canada achieved complete visibility into their data with automated workflows and data maps.

# 4 Broader Security Policy Enforcement

The sensitivity labeling that forms part of MIP is mostly managed by individual data owners at the point of use within M365. Enforcement of the security policies that relate to these labels is left to M365 tools such as Exchange, SharePoint and Cloud App Security. However, until all your documents are correctly labeled, this will leave significant gaps in security policy coverage.

ActiveNav can expand the relevance of MIP sensitivity labeling through the ability to both read and understand these labels and also to apply them to unlabeled documents, even when the documents are held in repositories outside of M365. This ability allows you to fully incorporate your sensitivity classification scheme into the scope of any discovery process. If automated remediation is required, ActiveNav can also apply an appropriate MIP sensitivity label based on a detailed understanding of the nature and purpose of the data.

Once you have full visibility of the sensitivity of the files within your data estate, you can readily identify files in unsuitable locations or with inappropriate access.

With data owners and users involved in manually setting MIP sensitivity labels there will always be doubt as to the accuracy of the labeling. ActiveNav provides a single platform from which to analyze and validate the MIP sensitivity labels on documents. Each document can be reviewed automatically, collecting file attributes and performing textual analysis before passing the results through a classification rules engine. You can then compare the result of the analysis to the sensitivity labels found in the documents. This comparison lets you gauge how well your users are classifying content within the MIP labeling framework against the findings of a policy-based rules engine. You can then use these insights to assess and review your labeling guidelines and improve end-user training.

## In Practice

### UNITED STATES CLIENT

- Data estate of 120 million files

### BENEFITS

- **99%** - Files remained unlabeled by users (of files suitable for labeling)
- **40%** - Inaccuracy in user-applied labels

## Key Takeaways

- Extend sensitivity labeling deeper into your data estate
- Incorporate sensitivity labels within your data discovery processes
- Validate and monitor manual labeling accuracy

# 5 Preparation for AI-Powered Innovation

Microsoft is focusing significant innovation onto M365 through AI-powered solutions introduced under Project Cortex. The aim is to streamline knowledge discovery, content management, and information sharing by using AI to surface information securely in the apps you use every day.

The Project Cortex initiative has already surfaced in two products: SharePoint Syntex and Viva Topics. Syntex enables you to build content models that automatically recognize documents or process forms. Models are built via machine-learning algorithms and can be taught how to interpret documents and apply relevant metadata. Microsoft Viva is an employee experience platform and its Topics function uses AI to automatically identify subject areas within both communications and content. These subject areas are then used to help connect users to related information and expertise within the business.

When using machine learning models, the training data is key to the success of the model. ActiveNav can help you make the most of these AI-based initiatives by ensuring you have the best set of training data from which to build the underlying models. This makes the learning process far quicker and more effective, giving you more control over the end result.

**63%**
of respondents cite improved searchability as key benefit from automated classification.

Source: AIIM survey

## Key Takeaways

- Leverage Microsoft's latest AI-powered innovations
- Ensure machine learning models are built using the best training data

*For more information on AI-powered solutions in Microsoft 365, visit Microsoft Knowledge & Content Services.

# About ActiveNav

ActiveNav is a data privacy and governance software provider and innovator of DMaaS (Data Mapping as a Service). With ActiveNav, organizations can map, clean, classify, quarantine, and delete sensitive, redundant, obsolete, and trivial data. Hundreds of leading companies and government agencies trust ActiveNav to help them control sensitive data and support compliance with various data privacy regulations such as the CPRA, CCPA, and GDPR.

ActiveNav Inc. is headquartered in the DC metro area and has offices in Europe and Australia. For more information, please visit ActiveNav.com.

**Americas**
Reston, VA, USA
+1 (571) 375-2780

**EMEA**
Winchester, UK
+44 (0) 1962 396690

**APAC**
Melbourne, Australia
+61 3 9982 4543

**Contact** sales@activenav.com
**Tweet** @ActiveNav
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