

BEFORE THE BOARD OF COUNTY COMMISSIONERS
FOR COLUMBIA COUNTY, OREGON

In the Matter of Adopting the Columbia
County Microsoft 365 Policy

ORDER NO. 53-2022

WHEREAS, This Board has previously adopted a Systems and Equipment Use (IT) Policy (IT Policy); and

WHEREAS, Columbia County is adopting Microsoft 365 for desktop applications, cloud storage and collaboration services; and

WHEREAS, the new capabilities made available through Microsoft 365 requires supplementation to the existing IT Policy;

NOW, THEREFORE, THE BOARD OF COUNTY COMMISSIONERS HEREBY ORDERS:

1. That the Columbia County Microsoft 365 Policy, which is attached hereto, and incorporated herein by this reference is adopted as a supplement the Columbia County Systems and Equipment Use (IT) Policy.

DATED this 14 day of September, 2022.

BOARD OF COUNTY COMMISSIONERS
FOR COLUMBIA COUNTY, OREGON

By: [Signature]
Henry Heimuller, Chair

By: [Signature]
Casey Garrett, Commissioner

By: [Signature]
Margaret Magruder, Commissioner

Approved as to form

By: [Signature]
Office of County Counsel

Microsoft 365 Policy

Introduction

Microsoft 365 (“M365”), formerly called Office 365, is a productivity suite of interconnected applications that offers convenient cloud-based services to facilitate your work at Columbia County. M365 combines traditional Office desktop applications (Word, Excel, Outlook, etc.) with cloud file storage and sharing services (SharePoint Online, OneDrive for Business) and collaboration apps such as Microsoft Teams. It also expands the availability of these services outside the traditional work environment. This policy provides rules regarding the acceptable use of M365 by County employees. These rules supplement the County’s Systems and Equipment Use (IT) Policy (“IT Policy”) and are applicable only to M365.

Security

Security requirements are detailed in Section 5 of the IT Policy. The same login you currently use to access email will get you into M365. Information Technology (“IT”) has already implemented two factor authentication for email and that same method of two factor authentication will continue under M365.

IT will not be performing backups of files stored in M365. Because of this M365 should not be used as the sole storage location for files that are subject to longer retention requirements.

Off Premises Use

Employees may access M365 when away from County offices, except FLSA non-exempt employees may only use such access during regular working hours or when pre-authorized by their supervisor for specific after hour’s access. Off Premises access to M365 is addressed in Section 5 of the IT policy, particularly subsections C & D of that section.

The preferred means of off premises access is through use of County issued equipment but users may choose to use non-County equipment. Before using non-County equipment, the user should familiarize themselves with Section 6 of the IT policy.

Teams

Microsoft Teams is a collaboration hub of multiple Teams sites that combines voice and video conferencing with instant messaging (Chat and Posts) and document storage, along with other integrated applications.

Team’s sites are collections of people who gather around a common goal and are typically organized around departments or functions. However, there will be sites that are common across departments, functions and even County wide.

The creation and deletion of Teams sites is managed by IT. IT will automatically create Teams for each Department and Committee currently existing in the County. It will also create Teams for all active projects currently housed on the T: drive. Users needing additional Teams need to submit a request form to IT. On this form you will specify a user who is the designated “records manager” for the team. The team records manager is responsible for the proper retention of all team records in compliance with the Secretary of States Record Retention Rules and any applicable federal retention requirements.

Teams is not intended to be a repository for the long-term storage of records subject to a retention schedule. Team sites that have been inactive for over one year will be removed from service. After five years of inactivity the Team site will be deleted.

Channel Conversations and Chat

Teams is a chat-based collaborative workspace that features group and individual messaging with threaded and persistent conversations. Users should keep in mind that in using Channels for conversations (sometimes called “Posts”) you are creating a public record that is subject to retention requirements. Channel conversations are subject to production in response to a public records request or as part of litigation. Never say anything in channel conversation that you would be uncomfortable having read by the general public or seeing on the front page of the newspaper.

Staff are responsible for preserving the records they create. However, Channel conversations cannot be easily preserved by an end user – they will require the Team Records Manager to periodically request a data extract from IT, for archival. One should also be requested once the Channel is no longer in use. Because both preservation and searches of channels are more complex and difficult, and pose significantly more labor intensive production for public records requests and/or legal discovery requests, staff should limit their use of channels to non-substantive discussions.

A separate general “Chat” area is typically available in Teams. This Chat section, unlike Channel conversations, cannot be centrally preserved or administered. Because of its inability to conform to necessary requirements for records retention/legal holds or ease of use for public records requests/legal discovery, this functionality will not be available to County staff. It has been turned off, administratively, to ensure that staff do not accidentally utilize the functionality.

Teams and Public Meetings

The Oregon public meetings law impacts the use of Teams when a majority of the members of any County board or commission are members of the Team. This includes not only the Board of Commissioners but also members of volunteer boards such as the Fair Board or the Planning Commission. A meeting is considered to be taking place anytime a majority of a board or commission ‘meets’ to deliberate toward or make a decision. This includes not only formal meetings but also less formal occasions where they receive information from staff on topics related to particular substantive or administrative matters that a quorum of the governing body will or may be called upon to decide. For this reason no Team should include a majority of the members of any board or commission.

This is a particular a problem for members of the Board of Commissioners. The Board is made up of three Commissioners. That means a meeting of any two Commissioners gives rise to Public Meeting concerns. For this reason Members of the Board of Commissioners should not be included in a Team. This restriction does not mean that Board Members cannot participate in Teams calls or meetings. Just keep in mind that if more than one Board Member joins the call the requirements of the Oregon Public Meetings law will apply.