

Project Plan (Project #56)

Using Orchestra and Purview for Role-Based Access, Workspace Management, Data Retention, and Sensitivity Labels in the M365 Environment

ABOUT THE PROJECT

New River depends heavily on Microsoft products for communication, data storage and management, security, and more. Unfortunately, some of the included management options are insufficient to adequately manage workspace provisioning, enforce governance policies, and provide insight about how M365 data in Teams, SharePoint, and OneDrive is being used. Additionally, a solution for identifying content by sensitivity and risk (data classifications) is needed.

Orchestra is a solution that integrates with M365 to provide these features and abilities.

On **May 20, 2026**, members of our IT staff (and our Chief Data Officer, Brooke Fincham) participated in a kickoff meeting with Orchestra representatives. Configuration will be completed in **early July**, and training information will be available by **August**. In mid-July, we will share information with users about how they will be impacted by this project and the accompanying changes (see accompanying *Communication Plan*).

Orchestra simplifies Microsoft Purview implementation by extending sensitivity labels into **workspace provisioning** and **continuous compliance management**. Instead of relying solely on native Purview for users to manually tag content, Orchestra embeds these labels directly into business workflows.

This combination of services enables us to better manage the data lifecycle, data retention, and role-based access. We will be better able to enforce governance policies and provide insight about Teams, OneDrive, and SharePoint usage.

NEW FEATURES

While many of the new management features will be used only by IT support staff, all users will benefit. Most employees will need to understand how to apply sensitivity labels to M365 documents effectively, based on three risk classification ratings (easier than it sounds). The workflow for requesting new Teams or SharePoint workspaces has changed and will be clearly defined and shared.

1. Implementing Orchestra and Microsoft Purview adds significant value for employees by reducing digital clutter, eliminating IT bottlenecks through self-service, and providing peace of mind through automated data security.

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2. By properly classifying data and cleaning up digital repositories, employees can safely use AI productivity tools (like [Microsoft Copilot](#)) without the anxiety of inadvertently accessing or surfacing highly sensitive information.
3. Data from meetings and chats in Teams, as well as files on OneDrive and SharePoint, can be routinely archived in accordance with retention policies. Orchestra will help to apply retention policies to archive this content.
4. Licensing optimization options are included to better manage M365 licensing, ensuring role-based alignment and efficient use.
5. The ability to manage Copilot via an Orchestra dashboard benefits IT staff by providing tenant-wide visibility into secure data and ensuring that only authorized content is surfaced by Copilot.
6. Users will access Orchestra via Teams and links in Orchestra email messages (not through the portal).
7. Approval workflows can be created, which can help involve supervisors in approving updates (and ensuring data accuracy and integrity).

TRAINING AND FAQ

1. **What impact will users see when we go live with Orchestra?**
 - a. Most security and management improvements will occur in the background. If you aren't using Teams or SharePoint sites, only adding sensitivity labels to Microsoft documents will be new and visible to users.
 - b. If a new Teams or SharePoint site is needed, the process to request one is simple. Templates are available, so new sites don't need to start from scratch.
2. **What information does a user need most?**
 - a. The training information is available online for self-help. Topical workshops will be developed for (a) managing M365 data and (b) using sensitivity labels.
 - b. **Managing M365 data** training is only needed by users who want to manage their OneDrive or request and manage a Teams or SharePoint workspace.
 - c. Learning to use **sensitivity labels** will benefit most users. They will learn to identify the six available sensitivity labels (what they mean, how to apply them, how their restrictions help safeguard information, and when to change a label).
 - d. Applying sensitivity labels will require each user to make decisions about each document. It is a time-consuming task and requires careful consideration. Supervisors may want to focus first on High-risk data or

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simply apply labels to newly created documents and return to High-risk data documents over time.

- e. The two simplest labels to apply do not require the document creator to choose the specific audience; they are Public and Internal.

3. How do you request a new Teams or SharePoint site?

- a. Open Teams, access the Orchestra app, (add the link from the organization-provided options 'NRCTC Teams' and PIN it to keep), then choose the appropriate template.

4. Why would I need a new Teams or SharePoint site?

- a. Employees might want to structure collaboration within or between departments, establish document libraries, or share information with other employees. SharePoint is the preferred method for these collaborations and is easier to manage than OneDrive.

5. Where do I find training information?

- a. See the Support Resources links included in this document.

6. Does DocuSign fully support encrypted files with assigned sensitivity labels?

- a. No, not yet. They are working on that feature request but have not yet announced an availability date. Currently, the only sensitivity label supported by DocuSign is **Public**.

7. What types of workspace templates will be available for Teams and SharePoint?

- a. There are 3 types of workspaces available: (1) Team, (2) Team Site, and (3) Communication Site. This doubles to 6, since each can be internal-only or both internal and external.
- b. Supervisors should be familiar with the distinctions to guide subordinates (see support resources for definitions).

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SUPPORT RESOURCES

Help Desk KB #154: An Introduction to Orchestra —
<https://help.newriver.edu/knowledgebase.php?article=154>

Help Desk KB #153: Understanding Sensitivity Labels —
<https://help.newriver.edu/knowledgebase.php?article=153>

New River Data Classification and Storage Procedures for GLBA Compliance —
<https://web.newriver.edu/procedures/GLBA-Compliance-Procedures.pdf>

Diagram of 6 Sensitivity Labels —
<https://web.newriver.edu/procedures/sensitivity-labels.pdf>

2026 Data Classifications and Risk Impact Levels —
<https://web.newriver.edu/procedures/data-classifications.png>

Training Resources from Orchestra —
<https://success.orchestra.com/articles/6717169035-end-user-adoption-resources?lang=en>

How to Navigate ‘My OneDrive’ from Microsoft Teams —
<https://vimeo.com/1165805782?fl=pl&fe=cm>

Types of M365 Workspace Templates Available —
<https://web.newriver.edu/procedures/M365-Workspace-Types.png>