

Threadfin's Microsoft Purview Quick Start



Customer: Regal Health
Employees: 1,100
Locations: 8

Duration: 4 – 6 weeks
Delivery Model: Fixed Fee
Investment: \$22,500

OVERVIEW

Regal Health, a 1,100–employee orthopedic clinic group, engaged Threadfin to establish a foundational Microsoft Purview environment to protect regulated data and prepare for AI-readiness. The organization operates a centralized headquarters with seven remote clinics, runs the Epic EMR platform and uses Microsoft Teams (Operator Connect) for telephony. With growing compliance obligations and the broader shift toward AI-driven services, Regal recognized the need to implement strong data governance controls, particularly for HIPAA-aligned data types.

Threadfin's Purview Quick Start engagement delivered a fixed-scope deployment focused on data classification, sensitivity labeling and DLP policies—laying the groundwork for secure collaboration and future AI adoption.

CURRENT STATE SUMMARY

- **EMR:** Epic, hosted in a private cloud
- **Security stack:** Fortinet (firewall, endpoint), Microsoft Defender (ATP) partially deployed
- **Telephony:** Microsoft Teams Phone (Operator Connect), Five9 Contact Center
- **Identity platform:** Entra ID, hybrid-joined Windows devices
- **Microsoft 365 licensing:** Microsoft 365 E5 for key compliance & security stakeholders, E3 for general staff

KEY DATA CHALLENGES

- No unified data classification or sensitivity labeling in place
- Email-based DLP via Exchange Online configured informally but not enforced
- Inconsistent file sharing and access policies between clinics
- Security/compliance teams lack visibility into data flows & risky behaviors

SCOPE OF WORK

The Quick Start was designed to deploy Microsoft Purview core features to support secure collaboration, meet compliance requirements and prepare for AI workloads. The following core workstreams were included:

1. Environment preparation
 - Configure Purview portal access & RBAC roles
 - Enable relevant compliance portals (Purview, Defender, Compliance Center)
2. Data discovery & inventory
 - Use Content Explorer & Data Classification to identify existing sensitive data
 - Review high-value data types (PHI, PII, clinical records)
3. Sensitivity labeling
 - Define Regal-specific labeling taxonomy (Public, Internal, Confidential, PHI)
 - Configure label settings (encryption, visual markings, auto-labeling)
 - Deploy labels to test groups & validate document flows
4. DLP policy design
 - Draft & implement simulation-mode DLP policies for SharePoint, Exchange, Teams
 - Monitor incidents & iterate based on test user behavior
 - Transition selected policies to enforcement phase with alerting
5. Purview reporting & visibility
 - Enable Activity Explorer, Content Explorer & Audit logging
 - Train admins on interpreting insights & responding to incidents
6. Admin training & knowledge transfer
 - Conduct live admin enablement session
 - Deliver documentation, provide Q&A follow-up session



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EXECUTION SUMMARY

To accomplish the scoped deliverables, Threadfin's engineering & compliance teams executed a structured, collaborative deployment over a four-week period. Key execution highlights include:

- **Joint working sessions:** Facilitated four structured working sessions with Regal Health's IT & Compliance stakeholders to align priorities, validate data types & finalize labeling taxonomy.
- **Data classification rollout:** Enabled Microsoft Purview Information Protection, created a label hierarchy aligned with HIPAA data types & published sensitivity labels in targeted pilot groups. Real-world document testing confirmed label application & inheritance across OneDrive, SharePoint & Exchange.
- **DLP policy implementation:** Designed & deployed Microsoft 365 DLP policies in simulation mode, tested with business users & then moved select policies to enforcement with incident alerting to Regal's compliance mailbox.
- **Policy tuning & feedback loop:** Incorporated feedback from initial pilot users into policy refinement. Optimized rule logic to reduce false positives & ensured compatibility with user workflows.
- **Reporting & visibility:** Enabled Activity Explorer, Content Explorer & Audit Logging in Purview. Created & delivered dashboard views for ongoing monitoring by the internal team.
- **Documentation & admin training:** Created customized documentation detailing Regal's specific policy configurations. Conducted a live 90-minute training session with IT & compliance admins and provided follow-up Q&A office hours.

CONTINUOUS ENABLEMENT

Threadfin's engagement includes a lightweight monthly Continuous Enablement service to maintain Regal's Purview configuration, adapt to emerging needs & ensure operational alignment. This includes:

- Bi-weekly environment snapshots & drift analysis
- Updates to labeling policies or DLP rules based on business changes
- Threat/risk watch for compliance posture & feature enhancements
- Ongoing advisory support for new Purview capabilities & security recommendations

This strategic post-engagement service ensures the work completed during the Quick Start remains aligned with evolving requirements & user behavior—without requiring a full in-house compliance team.

REMEDIATION RECOMMENDATIONS

While this Quick Start delivered a strong foundation, several areas were identified for future investment:

- **Label automation at scale:** Deploy auto-labeling policies based on content types & user behavior across all SharePoint libraries & OneDrive accounts
- **Endpoint DLP:** Extend data loss prevention policies to cover Windows endpoint activity (requires Defender for Endpoint & Defender DLP onboarding)
- **Data lifecycle & records management:** Leverage retention labels & Microsoft Records Management for clinical records and compliance-bound content
- **Fortinet + Purview integration:** Explore tighter integration between Fortinet's traffic analytics & Purview's data visibility for defense-in-depth
- **AI governance framework:** Begin drafting organizational AI usage policy backed by label-based access & protection

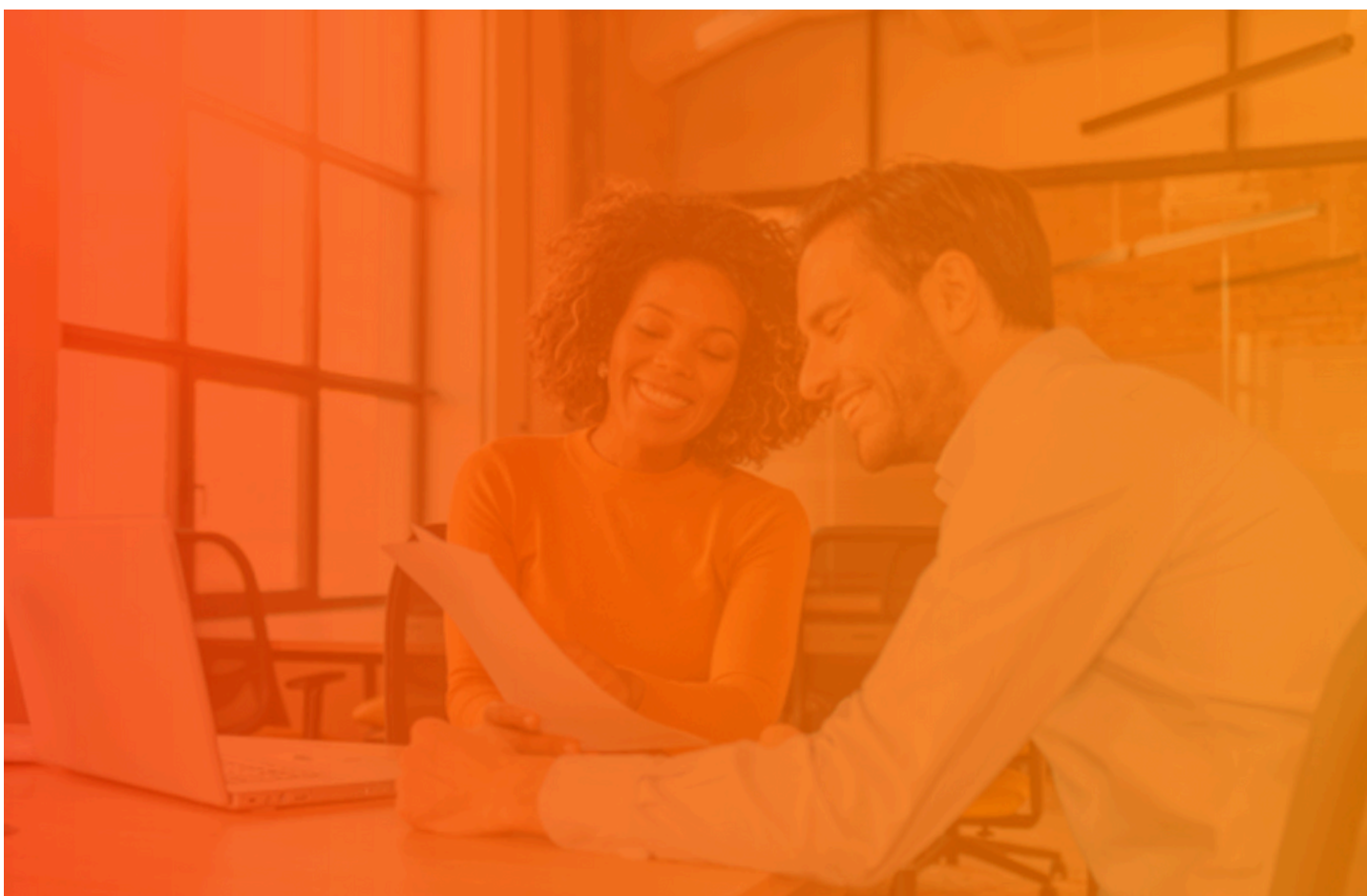


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COMPREHENSIVE ENGAGEMENT SUMMARY

Threadfin delivered a structured Microsoft Purview Quick Start that gave Regal Health foundational tools to classify, protect & monitor sensitive data across Microsoft 365. Through collaboration with IT & compliance stakeholders, we aligned governance goals with technical execution, enabled DLP, labeling & other critical features & transferred ownership via tailored documentation & training.

With the included Continuous Enablement service & a clear roadmap for next-phase improvements, Regal Health is now well-positioned to expand its data protection capabilities, adopt AI safely & operate with greater confidence across its distributed workforce & patient care environments.



CONTACT US TODAY TO GET STARTED