



Things to consider when evaluating Office 365 Retention Labels for Records Management

FEATURE	OFFICE 365 RETENTION LABELS (E3)	OFFICE 365 RECORDS MANAGEMENT (E5)	AVEPOINT RECORDS AND AVEPOINT CLOUD RECORDS
HIERARCHICAL TAXONOMY	NO	NO BUT... You can add file plan categories to retention labels although this is restricted to three levels	YES 👍
FILE PLAN MANAGEMENT	NO	YES 👍 BUT... File plan must be in a flat structure	YES 👍 AND... Taxonomy terms can be active, inactive or removed altogether. In addition, terms can be active for a preconfigured period of time, active after a certain date, or made inactive from a point in time.
APPLY MULTIPLE LIFECYCLE RULES (FOR MULTI-STAGE CONTENT LIFECYCLE) TO A SINGLE TERM/LABEL	NO Only a single disposition outcome (e.g. retain document, declare record, destroy) can be applied to a label	NO Only a single disposition outcome (e.g. retain document, declare record, destroy) can be applied to a label	YES 👍 AND... Rules can include both lifecycle and end of life disposition actions, including record declaration, move to new locations, export and destruction.
EXPORT TERMS/LABELS WITH ASSOCIATED RETENTION RULES	NO	YES 👍	YES 👍
IMPORT TERMS/LABELS	NO	YES 👍 BUT... Labels can only be configured in a flat structure	YES 👍
APPLY TERMS/LABELS TO ANY OFFICE365 ARTEFACT	NO Office 365 only supports the application of labels to documents and emails however defaults can be applied at a Document Library or folder level.	NO Office 365 only supports the application of labels to documents and emails however defaults can be applied at a Document Library level.	YES 👍 AND... Labels can be applied to documents, list items, emails etc as well as Office 365 containers such as folders, libraries, sites.
MANAGE RECORDS 'IN PLACE' WITHIN OFFICE 365	YES 👍	YES 👍	YES 👍
MANAGE RECORDS 'OUT OF PLACE' WITHIN OFFICE 365	YES 👍 BUT... Office 365 does have a traditional records centre, however new features such as labels and policies cannot be used to send records to the records centre.	YES 👍 BUT... Office 365 does have a traditional records centre, however new features such as labels and policies cannot be used to send records to the records centre.	YES 👍 Information can be managed in the location it was created or moved to another location such as an archive or Records Center according to business needs.
APPLY TERMS/LABELS WITHOUT USER INTERVENTION	NO	YES 👍 BUT... There is up to 7-day latency for auto classification actions.	YES 👍
DECLARE AN ITEM AS AN IMMUTABLE RECORD	YES 👍 BUT... The label to declare an item as a record must be applied by a user and record metadata can still be changed.	YES 👍 BUT... The record metadata can still be changed	YES 👍 AND... Record declaration can be automated
DECLARE AN ITEM AS A RECORD WITHOUT USER INTERVENTION	NO	YES 👍 BUT... There is up to a 7-day latency for the retention label declaring the record to be applied and metadata can still be edited following record declaration. Metadata columns used for auto application need to be mapped as a Searchable Field in SharePoint search and Keyword Query Syntax language needs to be used to specify searchable phrases and properties.	YES 👍

FEATURES	OFFICE 365 RETENTION LABELS (E3)	OFFICE 365 RECORDS MANAGEMENT (E5)	AVEPOINT RECORDS AND AVEPOINT CLOUD RECORDS
APPLY METADATA DURING RECORD DECLARATION	NO	NO	YES 👍
MANAGE ITEMS WHETHER THEY HAVE BEEN DECLARED RECORDS OR NOT	YES 👍	YES 👍	YES 👍
REQUIRE A RETENTION LABEL OR TERM TO BE APPLIED	NO	NO	YES 👍
EXPORT TO LONG TERM PRESERVATION FORMAT	NO	NO	YES 👍 AND... Export formats are certified against government standards
MANAGEMENT OF NON- ELECTRONIC INFORMATION	NO	NO	YES 👍 Manage physical and electronic information using the same file plan or classification scheme
AUDIT TRAIL RETENTION	YES 👍 BUT... Audit trails are only retained for 90 days	YES 👍 BUT... Audit trails are only retained for 1 year	YES 👍 AND... Audit trails are retained for an indefinite period of time
DEFENSIBLE DESTRUCTION	NO	YES 👍 BUT... Defensible destruction is available in the Disposition tab - Disposed Items list and details of items will only be kept for 7 years after the item was disposed	YES 👍 AND... Full defensible destruction includes the ability to retain a metadata stub following disposal, the ability to capture a disposal or disposition class against business rules, production of a destruction certificate following a disposal processes and the ability to comprehensively audit all retention and disposal actions.
DISPOSITION OR DISPOSAL TRIGGERS	YES 👍 BUT... Disposition triggers are limited to; Date Created Date Modified Date Label Applied Event based retention is supported although requires significant configuration and oversight	YES 👍 BUT... Disposition triggers are limited to; Date Created Date Modified Date Label Applied Event based retention is supported although requires significant configuration and oversight	YES 👍 AND... Disposition or disposal processes can be triggered from any metadata captured in the system, either date or event based.
DISPOSITION OR DISPOSAL PROCESS KICK OFF	YES 👍 BUT... Is run automatically each week	YES 👍 BUT... Is run automatically each week	YES 👍 AND... Can be run on a defined schedule or triggered on demand
MULTI-STAGE DISPOSITION OR DISPOSAL APPROVAL PROCESS	NO Disposition approval is limited to one person only	NO Disposition approval is limited to one person only	YES 👍 AND... Manual approval reviews prior to disposal is a multi stage escalation process
CONFIGURABLE REPORTING	YES 👍 BUT... Reports are combined with security and compliance reporting	YES 👍 BUT... Reports are combined with security and compliance reporting	YES 👍 AND... Reports have been specifically designed for records management process and actions.
RECORDS IN HYBRID ENVIRONMENTS	NO Labels can only be used in Office 365, they are not available for on-premises SharePoint	NO Labels can only be used in Office 365, they are not available for on-premises SharePoint	YES 👍 AND... Terms and rules can be extended across your cloud and on-premises environments as well as physical records