



















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

FEATURES	 RETENTION LABELS	 CLOUD RECORDS
HIERARCHICAL TAXONOMY	NO	YES 
FILE PLAN MANAGEMENT	YES  BUT... Labels can only be configured in a flat structure	YES 
INHERITED TAXONOMY	NO	YES 
TAXONOMY TERM/ LABEL RETIREMENT	YES  A label is active when published using a policy. If a policy is withdrawn the label will become inactive.	YES  AND... Taxonomy terms can be active, inactive or removed altogether. In addition, terms can be active for a pre-configured 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	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	YES 	YES 
IMPORT TERMS/LABELS	YES  BUT... Labels can only be configured in a flat structure	YES 
APPLY TERMS/LABELS TO ANY OFFICE 365 ARTEFACT	NO Office 365 only supports the application of labels to documents and emails.	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 
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 

FEATURES	OFFICE 365 RETENTION LABELS	AVEPOINT CLOUD RECORDS
<p>DECLARE AN ITEM AS A RECORD</p>	<p>YES </p>	<p>YES </p>
<p>APPLY METADATA DURING RECORD DECLARATION</p>	<p>NO</p>	<p>YES </p>
<p>MANAGE ITEMS WHETHER THEY HAVE BEEN DECLARED RECORDS OR NOT</p>	<p>YES </p>	<p>YES </p>
<p>EXPORT TO LONG TERM PRESERVATION FORMAT</p>	<p>NO</p>	<p>YES  AND... Export formats are certified against government standards</p>
<p>APPLY TERMS/LABELS WITHOUT USER INTERVENTION</p>	<p>YES  BUT... Requires an E5 license. Limitations include an inability to apply labels to declare documents as records, and up to 7 day latency for auto classification actions.</p>	<p>YES </p>
<p>MANAGEMENT OF NON-ELECTRONIC INFORMATION</p>	<p>NO</p>	<p>YES  Manage physical and electronic information using the same file plan or classification scheme</p>
<p>AUDIT TRAIL RETENTION</p>	<p>YES  BUT... E3 License: Audit trails are only retained for 90 days; E5 License: Audit trails are only retained for 1 year</p>	<p>YES  AND... Audit trains are retained for an indefinite period of time</p>
<p>DEFENSIBLE DESTRUCTION</p>	<p>NO</p>	<p>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.</p>
<p>DISPOSITION OR DISPOSAL TRIGGERS</p>	<p>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</p>	<p>YES  AND... Disposition or disposal processes can be triggered from any metadata captured in the system, either date or event based.</p>
<p>CONFIGURABLE REPORTING</p>	<p>YES  BUT... Reports are combined with security and compliance reporting</p>	<p>YES  AND... Reports have been specifically designed for records management process and actions.</p>
<p>RECORDS IN HYBRID ENVIRONMENTS</p>	<p>NO Labels can only be used in Office 365, they are not available for on-premises SharePoint</p>	<p>YES  AND... Terms and rules can be extended across your cloud and on-premise environments as well as physical records and file shares</p>