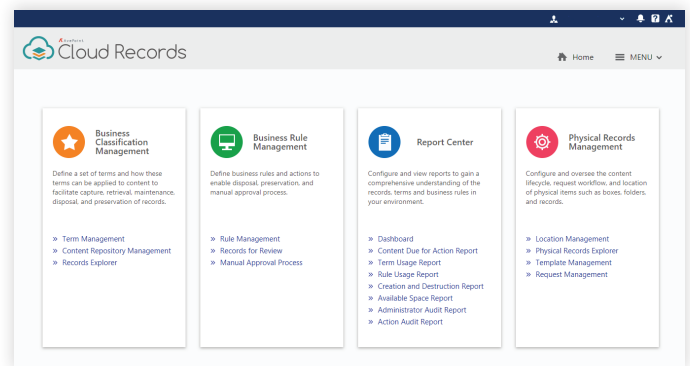


# Microsoft 365 Records Management

All in one Control of Your Microsoft 365 Content, SharePoint On-Premises, File Systems & Physical Records

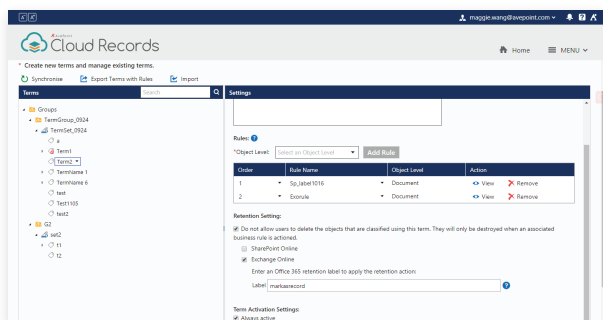
## Simplified Classification & Taxonomy Management

- **Single Interface Management** - Streamline the classification and file plan process with a single interface that allows Records Managers to configure and manage a classification scheme or file plan and apply retention and disposal rules.
- **Rule Application** - The Records Manager can apply multiple rules directly to single classification terms, while also applying retirement settings that dictate the life of the term.
- **Manual or Automatic Configuration** - User input can be configured to be as manual or automatic as your organization requires.
- **Business Classification Management** - Without switching between multiple windows, you can create business classification terms, import terms and retention and disposal rules, associate business classification terms with rules, and synchronize business classification terms—all-in-one place.
- **Maximize Productivity**—Easily link business rules to file plan terms, view all records environments, apply settings, and assign content to business owners through a single pane of glass.
- **Unique Identifiers** - Allows the Records Manager to configure unique identifiers for content across any site collection and according to a predefined pattern. The document or record is assigned the unique ID when it is created or captured – no end user input required.

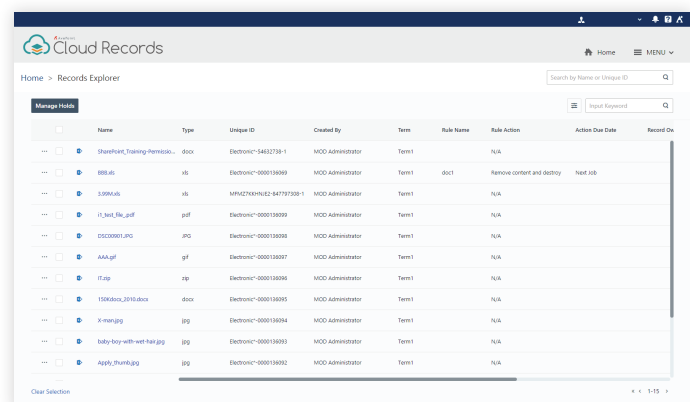


Management from Single Interface

- **Records Explorer** - Perform actions directly on content regardless of the source to manage disposal holds, reclassify documents, declare content as a record, and more through a single pane of glass.
- **Automatic Classification** - Configure metadata-based auto classification rules to apply file plan terms or classification to content in Microsoft 365, Exchange Online, SharePoint on-premises, and file shares.
- **Exchange Online Integration** - Manage and classify emails in place by applying appropriate Records terms or move emails and attachments from mailboxes into SharePoint for an out-of-place management approach.

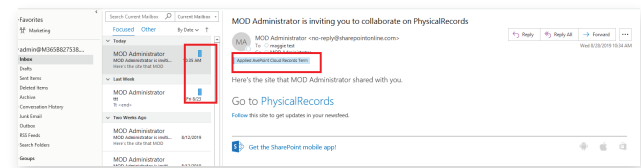


Business Classification and File Plan Management



Records Explorer

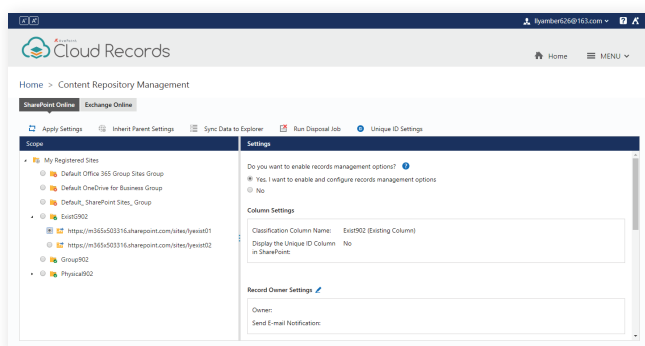
- **Global Search** – Search using metadata such as name, format, type, and classification to help quickly locate the records that you need and take actions directly to manage the content.



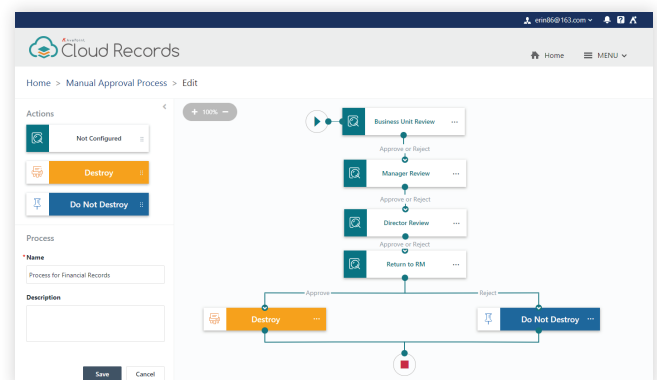
Emails with Applied Terms

## Intuitive Retention & Disposal Rules

- **Information Lifecycle Management** - Seamlessly allows your Records Manager to build business rules that can manage any stage of your information lifecycle.
- **Disposal Holds** - Prevent future disposal of content with a disposal hold, so users can safely access, edit and utilize content knowing a disposal action will not occur until the hold's been lifted.
- **Flexible Rules** - Build flexible business rules that can determine lifecycle outcomes for your content by creating action- or date-based triggers, and using any metadata captured against an object as criteria for the rule.
- **Manual or Automatic Rules** - These rules can be completely automated (without user intervention) or run with manual approval from a record owner.
- **Multi-stage Manual Approval Process** – Utilize a manual approval process (up to five steps) with a drag-and-drop workflow builder for record disposal approval. Flexibly extend disposal time and easily reassign the reviewer if the approver was assigned in error.
- **Content Lifecycle Settings** - Create, edit, or delete rules to decide whether to retain, remove, archive, destroy, or export current content.
- **Content Repository Management** - Apply information management policies to Microsoft 365 content, Exchange Online, and File Shares, regardless of format, from the time of creation through decisions on retention, disposal, or transfer.
- **Records for Review** - Records Managers can build a multi-stage approval workflow (up to 5 steps) for managing disposal approvals, using a visual workflow builder. Business owners can approve or reject disposal actions with full decision history kept as part of audit trails to support defensible disposal processes.
- **Related Records** - Relate and manage items together whether electronic or physical, choosing to destroy the related record with its parent or separate them to be managed as single items.



Disposal Action Activity Management



Escalate Manual Approval Batch to Additional Reviewers

Define an object level

Document/E-mail/Physical Folder

Define a disposal class

Disposal Class:

Select a content source and define rule criteria

SharePoint Online Exchange Online Physical Records

Define rule criteria

Manage the content when all of these criteria are met.

Column (Date and Time) Date Closed older Than 7 Years

What would you like to do with the content?

Remove content and destroy Move to a new location

Enable manual approval?

Enable manual approval

Flexible Rules

lib1

Home EDIT LINKS

New Upload Sync Share More

All Documents Find a file

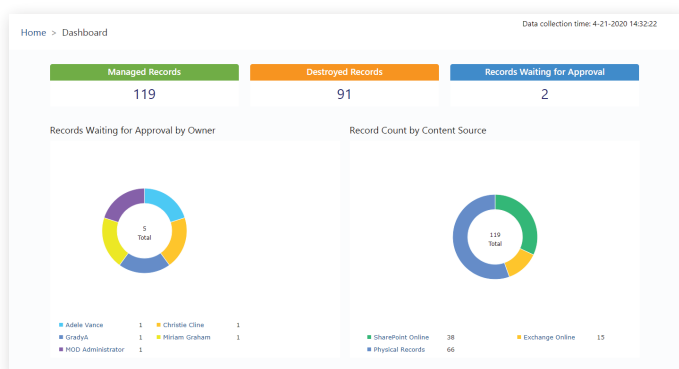
Name	Modified	Modified By	Classification Column	Related Records
document1	5 minutes ago	MOD Administrator	term1	document2.txt
document2	5 minutes ago	MOD Administrator	term1	document1.png
document3	4 minutes ago	MOD Administrator	term2	item1
document4	7 minutes ago	MOD Administrator	term2	

Drag files here to upload

Related Records

## Smart Auditing & Reporting

- **Report Center** - Configure, view, and download reports, and gain a comprehensive understanding of how information is being managed in your electronic and physical environment.
- **Records Management Dashboard** - Display visual reports on a graphical dashboard to allow Records Managers to view details of the number of items being managed by the system, what's been destroyed, who has outstanding approval tasks, and more.
- **Information Management** - Use reports to proactively manage your information outcomes and report on all actions performed on items or by a user.
- **Administrator Audit Reporting** - Out-of-the-box audit reporting solution displays detailed information of activities, including operation records and export records, performed in Cloud Records within a specific timeframe.
- **Action Management** - Access multiple reports to manage upcoming disposal actions, and interrogate actions performed on an item or by a user.



Records Management Dashboard

Home > Rule Usage Report

This report is used to help users understand how many terms are associated with the selected rule.

Rule Selection: Document Retention

Export Report

Rule Name	Term Name	Term Full Path	Term Status
Document Retention	Term 1	TermGroup001/1/termSet/term 1	Active
	Term 2	TermGroup001/1/termSet/term 2	Active
	Term 3	TermGroup001/1/termSet/term 3	Active
	Term 4	TermGroup001/1/termSet/term 4	Active
	Term 5	TermGroup001/1/termSet/term 5	Active

Criteria

1. Document, Created Time, From 2017-07-04 11:53 UTC To 2017-09-30 11:53 UTC (1)

Action on the SharePoint Content

Archive and retain content in SharePoint

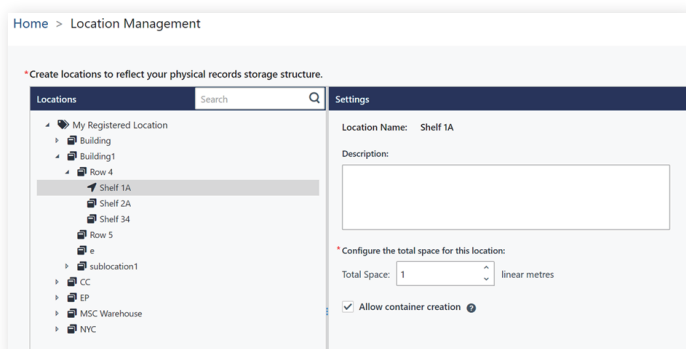
Enable Manual Approval

No

Rule Usage Report

## Physical Records Management

- **All-in-One Records Management** - Manage physical items, including cabinets, boxes, folders, and records, using the same classification scheme and business rules.
- **Template Management** - Create different physical templates and template suites for boxes or folders, assigning or inheriting metadata to each.
- **For End Users** - Create requests for the loan of physical folders or boxes as well as request the creation of new physical items triggering an approval workflow to the records management for oversight and review.
- **For Records Managers** - Physical records explorer gives full oversight of what's happening in the physical world including creation, movement and tracking of all physical information across the organization.
- **Access Control** - Apply access controls to physical records for enhanced security.
- **Space Management** - Easily perform simple space management activities using the reporting that comes with physical records.



Location Management through the Records Interface

Home > Physical Records Explorer

General Information

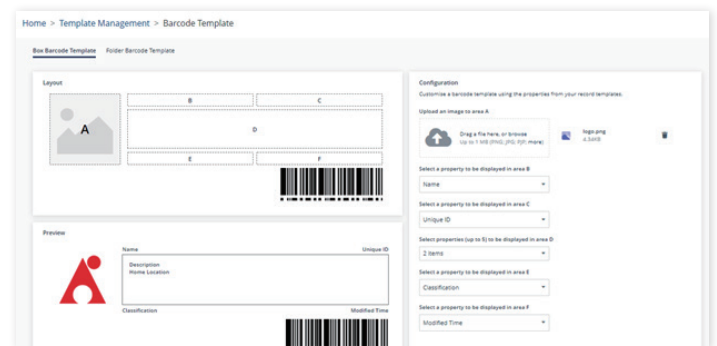
Field	Value
Title	Shelf
Total Space	5
Created Time	2020-01-23 13:17:42 (UTC+08:00) Beijing, China
Modified Time	2020-01-23 13:17:59 (UTC+08:00) Beijing, China
Created By	Maggie Wang
Modified By	Maggie Wang
Location Full Path	My Registered Location/Building/Room

Items in Location

Filter	Title	Type	Unique ID	Capacity	Box	Folder	Disposal Class
No items to show in this view.							

Physical Records Explorer

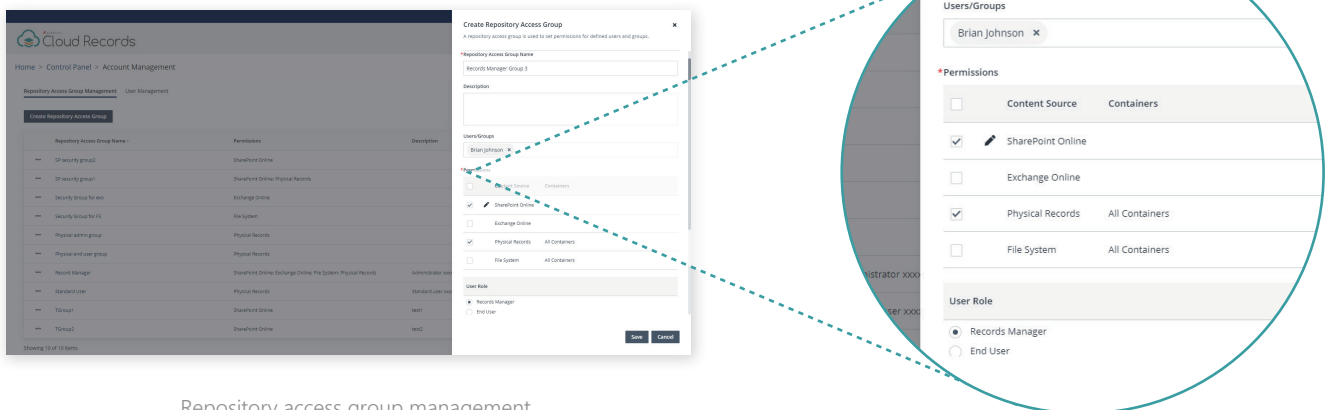
- **AvePoint Records Mobile App** – Scan Cloud Records physical barcodes via the AvePoint Records mobile app to perform actions in bulk, such as moving or updating item status.
- **Customizable Barcode** – Add a logo and up to 5 metadata fields to the barcode label.



Customize physical records barcode

## Centralized Management & Security

- **Delegated Access** – Delegate permissions to defined groups or users allowing management of the content repositories according to different business requirements.
- **Physical Records Access Control** – Determine what actions end users can perform on all physical records and place access controls on specific physical locations to restrict access at both location and physical item levels.



Repository access group management

For a comprehensive list of new features in this release, please view our [AvePoint Cloud Records Release Notes](#).

## How to Buy AvePoint Products

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