Office 365 Records Management

Gain Control of Your Office 365 Content & Physical Records

Key Benefits

Management from a Single Interface

Streamline the classification and taxonomy process with a single interface that allows Records Managers to configure and manage a classification scheme, apply retention and disposal rules, and apply terms automatically to remove end user burden.

Flexible Retention & Disposal Rules

Allow Records Managers to build business rules that can determine lifecycle outcomes for your content by creating rules that can be action- or date-based, can use any metadata, and be automated or manual.

Quick Access to Multiple Reports

Proactively manage your information outcomes and report on actions performed on items, or by a user, with comprehensive out-of-the-box reporting and dashboard, and the ability to interrogate audit trails of actions.

Manage Physical & Electronic Records

Manage hard copy content alongside electronic in a centralized store that allows the Records Manager to oversee file and item lifecycle management, perform space management activities, and generate reports.

The Records Management Process...Simplified

AvePoint Cloud Records brings order while eliminating the burden of traditional records management tasks for end users. Manage Office 365 electronic content and physical records efficiently, achieving compliance without user intervention. Easily apply automated business rules that manage your content lifecycle—from creation, to classification, and retention. Plus, AvePoint's SaaS solution lets you maintain oversight with built-in reporting and auditing.

Classification and Taxonomy: *Manage a classification scheme or taxonomy and push terms to Office 365—all through a single interface.*

- Manage classification schemes or file plans to apply retention and disposal rules to content without needing to understand the inner workings of Office 365
- Easily view and manage an entire SharePoint environment to associate file plan terms with rules for retention or disposal, apply term settings, and assign content to business owners
- Configure user input as manual or automatic, depending on an organization's requirements

Retention & Disposal: *Manage your information lifecyle with multiple outcomes for content.*

- Associate lifecycle outcomes with business rules that remove, retain, archive, or destroy content
- Build flexible business rules to trigger lifecycle outcomes based on actions or metadata
- Rules can be completely automated (without user intervention) or run with manual approval from a record owner
- Business owners can approve, reject, or escalate records from a single interface

Auditing & Reporting: *Proactively manage your information outcomes and report on all actions performed on items, or by a user.*

- Ensure system governance with comprehensive out-of-the-box administrator audit reporting
- Report center allows you to configure, view, and download reports, and gain a comprehensive understanding of the content and rules in your environment
- Access multiple reports to manage upcoming disposal actions, and interrogate actions performed on an item or by a user
- Records managers can view graphical reports on a Records Management Dashboard, including managed records, destroyed records, records that have outstanding approval actions etc

Physical Records: *Manage physical items – including boxes, files, and records – alongside electronic items, or in a centralized location.*

- End users can create various requests to obtain the physical items they need, which can trigger corresponding workflows
- Built-in workflows give the Records Manager full oversight of what's happening in the physical world, and allows them to view physical files through the SharePoint interface
- Perform simple space management tasks using physical records reporting

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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