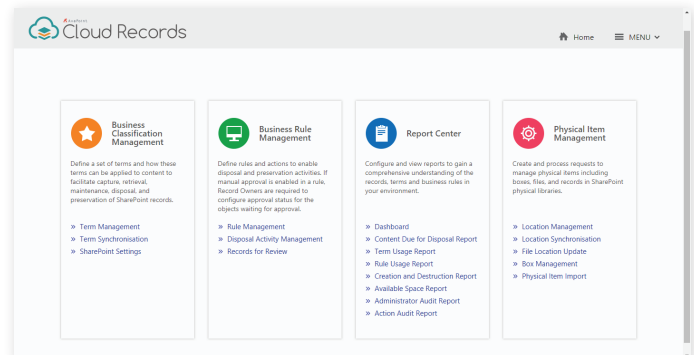


Office 365 Records Management

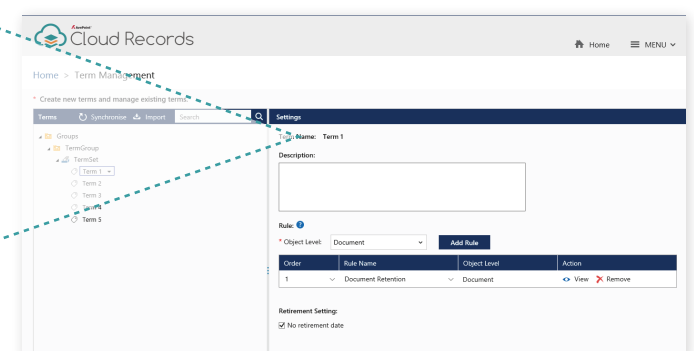
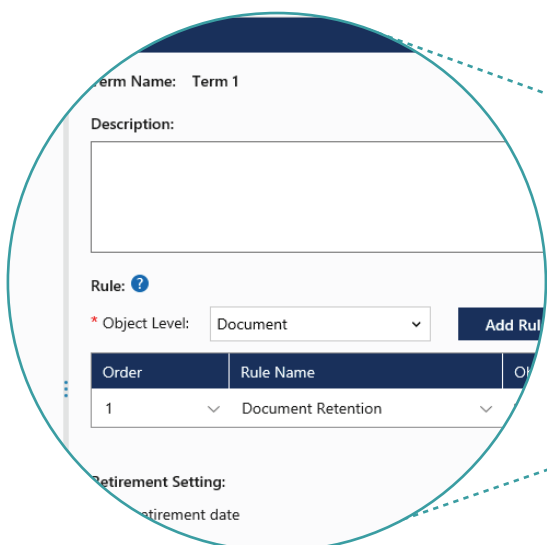
Your Cloud. Our SaaS. Gain Control of Your Office 365 Content & Physical Records Together.

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 classifications, 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 from a term store, 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 an entire SharePoint environment, 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.



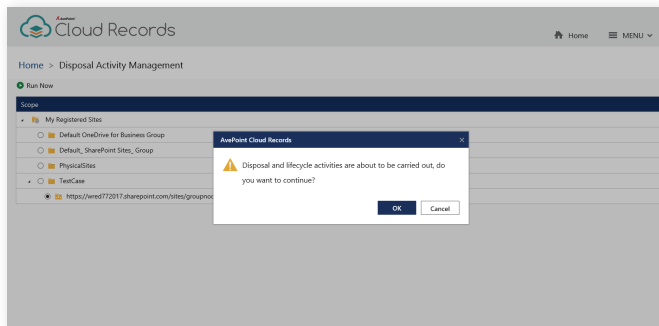
Management from a single interface



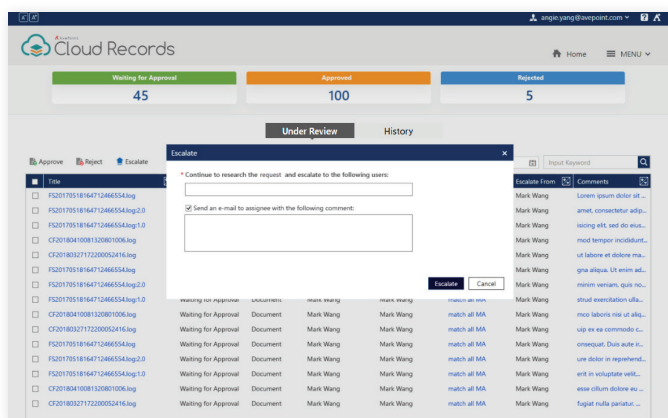
Business Classification and File Plan Management

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.
- **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.

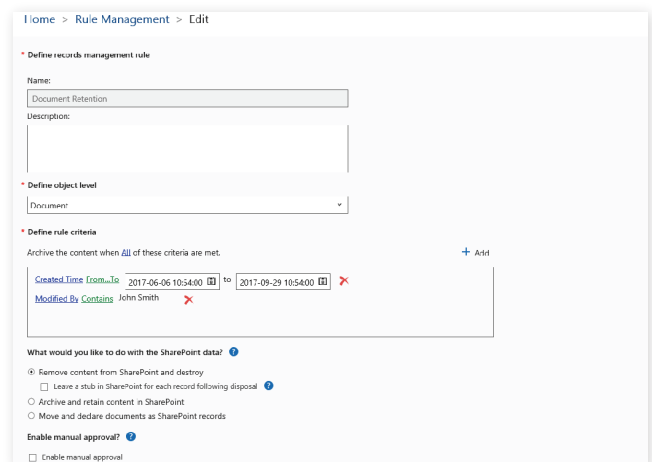


Disposal Activity Management



Escalate manual approval batch to additional reviewers

- **Manual or Automatic Rules** - These rules can be completely automated (without user intervention) or can be run with manual approval from a record owner.
- **Content Lifecycle Settings** - Create, edit, or delete rules to decide whether to retain, remove, archive, or destroy current content.
- **Disposal Activity Management** - Apply information management policies to Office 365 content, regardless of format, from the time of creation through to decisions on retention, disposal, or transfer.
- **Records for Review** - Business owners can approve or reject records from a single interface and with a multi-stage escalation process once the first reviewer has actioned the record, and then they can send it on to the next person for further review.

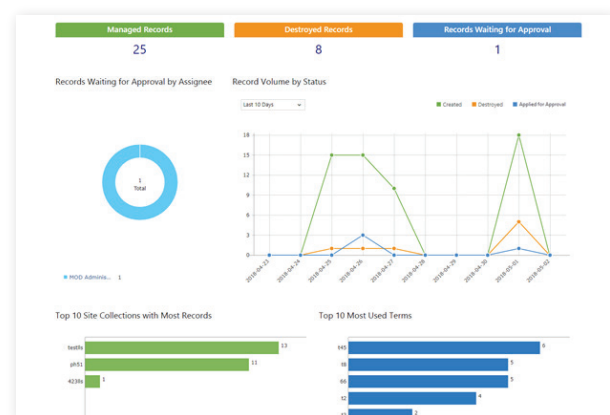


Flexible Rules

Smart Auditing & Reporting

- **Report Center** - Configure, view, and download reports, and gain a comprehensive understanding of how your information is being managed in your 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 Search

Export Report

Rule Details	Term Name	Term Full Path	Term Status
Rule Name: Document Retention	Term 1	TermGroup001/TermSet/Term 1	Active
Description: Document Retention	Term 2	TermGroup001/TermSet/Term 2	Active
Object Level: Document	Term 3	TermGroup001/TermSet/Term 3	Active
Criteria: 1. Document, Created Time: From 2017-07-04 11:53 UTC To 2017-09-30 11:53 UTC (1)	Term 4	TermGroup001/TermSet/Term 4	Active
Action on the SharePoint Content: Archive and retain content in SharePoint	Term 5	TermGroup001/TermSet/Term 5	Active
Enable Manual Approval: No			

Rule Usage Report

Home > Site Access Report

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

Report Profile: My Registered Sites

URL Filter: https://dgc071309061.laharepo... https://dgc071309061.laharepo... https://dgc071309061.laharepo... https://dgc071309061.laharepo... https://dgc071309061.laharepo... https://dgc071309061.laharepo... https://dgc071309061.laharepo...

URL	Type	User	Action
https://dgc071309061.laharepo...	Document	John Smith	View
https://dgc071309061.laharepo...	Document	John Smith	View
https://dgc071309061.laharepo...	Document	John Smith	View
https://dgc071309061.laharepo...	Document	John Smith	View
https://dgc071309061.laharepo...	Document	John Smith	View
https://dgc071309061.laharepo...	Document	John Smith	View
https://dgc071309061.laharepo...	Document	John Smith	View
https://dgc071309061.laharepo...	Document	John Smith	View

Site Access Report

Physical Records Management

- **All-in-One Records Management** - Manage physical items, including cabinets, boxes, files, and records, alongside electronic items all in a centralized location.
- **Workflow Management** - 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.
- **For End Users** - Users can create various requests to obtain and import the existing physical items, files, and records they need to a SharePoint Online physical library, which can trigger corresponding workflows.
- **For Records Managers** - Review, process, create, and submit requests, and thereby provide end users with what they need from the physical library.
- **Space Management** - Easily perform simple space management activities using the reporting that comes with physical records.
- **File Location Update** - Automatically or manually update file location property tagged in SharePoint to ensure it matches with files' actual storage location.

Home > Location Management

Location Term Tree

Create and manage location terms that will be used in SharePoint libraries to hold physical items.

Location	Synchronise	Search	Settings
LocationSet			
Holding Box			
ShenLan			
Book Room			
Room 1			
Room 2			
Room 3			
Room 4			
Room 5			

Location Name: Room 1

Configure the total space for this container:

Total Space: 20 linear metres

Location Management through the Records Interface

Office 365

Records Repository

Boxes

Name	Availability	Home Location	Currently Held By	Box Type	Process Box Held	Archived	Lifecycle Status
Holding Box	...						
Building	...						
Building2	...						

Key Filters: physicalTest, Home Location

Physical Item Management through the SharePoint Interface

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

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