



Records and Information Management for SharePoint and Office 365

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Microsoft
Partner



Gold Application Development
Gold Cloud Platform
Gold Cloud Productivity
Gold Collaboration and Content

Accessible content is available upon request.

Introducing our Presenters

Paul Olenick
Director, Product Strategy

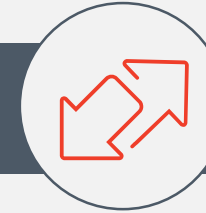


Alyssa Blackburn
Director, Information Management



About AvePoint: Corporate Overview

Migrate. Manage. Protect



AvePoint is headquartered and maintains its principal operational center in Jersey City, NJ, with approximately 1,500 employees across five continents.

From Tahoe
to Today

Inc. Magazine
Hire Power
Award

Ernst & Young
Entrepreneur
of the Year

Windows IT Pro
Best SharePoint
Product

Deloitte
Technology
Fast 500

16K

Customers

6M

Cloud Users

88

Countries

7

Continents



Microsoft
Partner



2017 Partner of the Year Winner
Public Sector: Microsoft CityNext Award

2016 Partner of the Year Winner
Technology for Good Citizenship Award

2015 Partner of the Year Winner
Collaboration and Content

2014 Partner of the Year Winner
Public Sector: Public Safety and National Security



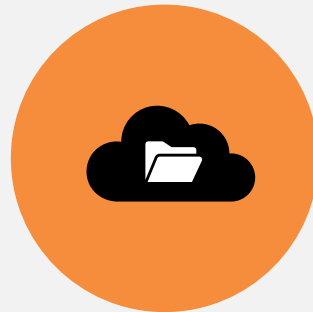
Agenda



The Records
Manager's
Challenge



Industry
Trends



Records
Management in
Office 365



How
AvePoint
can Help



AvePoint
Records
Vision



What's Next



The Records Manager's Challenge

Learning about Record Managers



Dozens of
interviews



Numerous
Conferences



Dozens of Customer
Conversations



Vendor
discussions



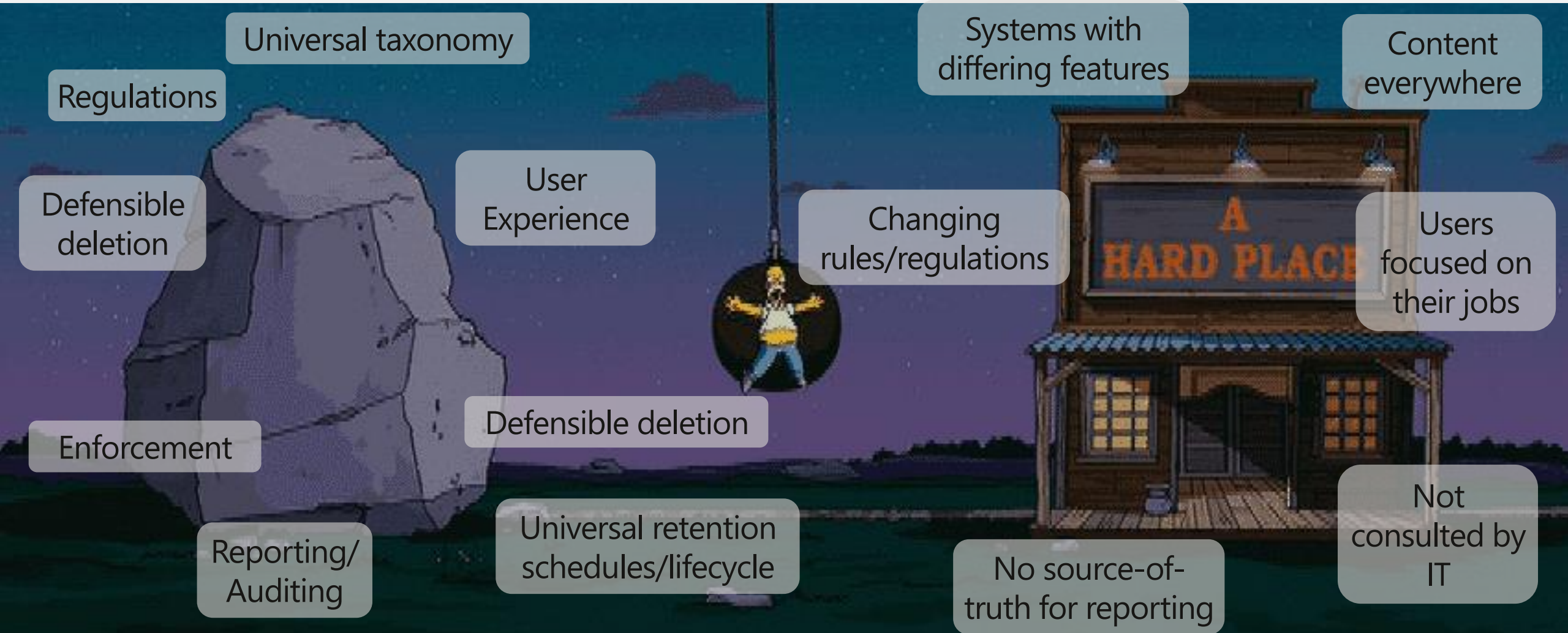
Ran through Jobs
Framework



Analysis of
available tooling



The Records Manager Position



Four Main Jobs of a Records Manager



Classification & Taxonomy



Retention & Disposal



Audit & Reporting

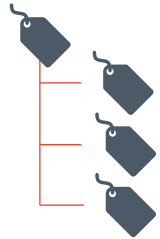


Physical Records

- Track Physical Records
- Find Physical Records
- Request Physical Records
- Manage Physical Locations
- Add/Remove Records/Containers



Must-haves for a Records Solution...



Defining
Classifications

Associating
outcomes with
Classifications

Deploying
Classifications and
Outcomes to relevant
locations

Classifying Content

Reporting and
auditing

Centralised definition of
file classifications

Retain/Expire/Export
according to **policy**

Classification branches
available to **appropriate**
audiences

Ensure **accuracy** while
minimising the
burden on end users

Monitor, audit and **prove**
compliance

Industry Trends

Typical Cloud Organisations

Internal/External Collab



Purpose-Built



Custom LOB Apps



Business Process Automation



Security and compliance requirements for every industry and geography

Advanced ML/AI tech from each vendor



Organisations on Consolidated Platform

Microsoft Cloud

Internal/External Collab



Purpose-Built



Custom LOB Apps



Business Process Automation



Security and compliance requirements for every industry and geography

Advanced ML/AI tech from each vendor



One set of records management tooling for all content



Records Management in Office 365

Legacy/On-Premises Experience



Classification & Taxonomy



Retention & Disposal



Audit & Reporting



Physical Records

Information
Management
Policies Per Site
Collection

Manage
Taxonomy
Across Site
Collections

Siloed Audit
Information

Cross Farm Taxonomy Management

No native tooling

No native tooling

SharePoint Server
Farm



SharePoint Server
Farm 2



Office
365/SharePoint
Online



Physical
Records

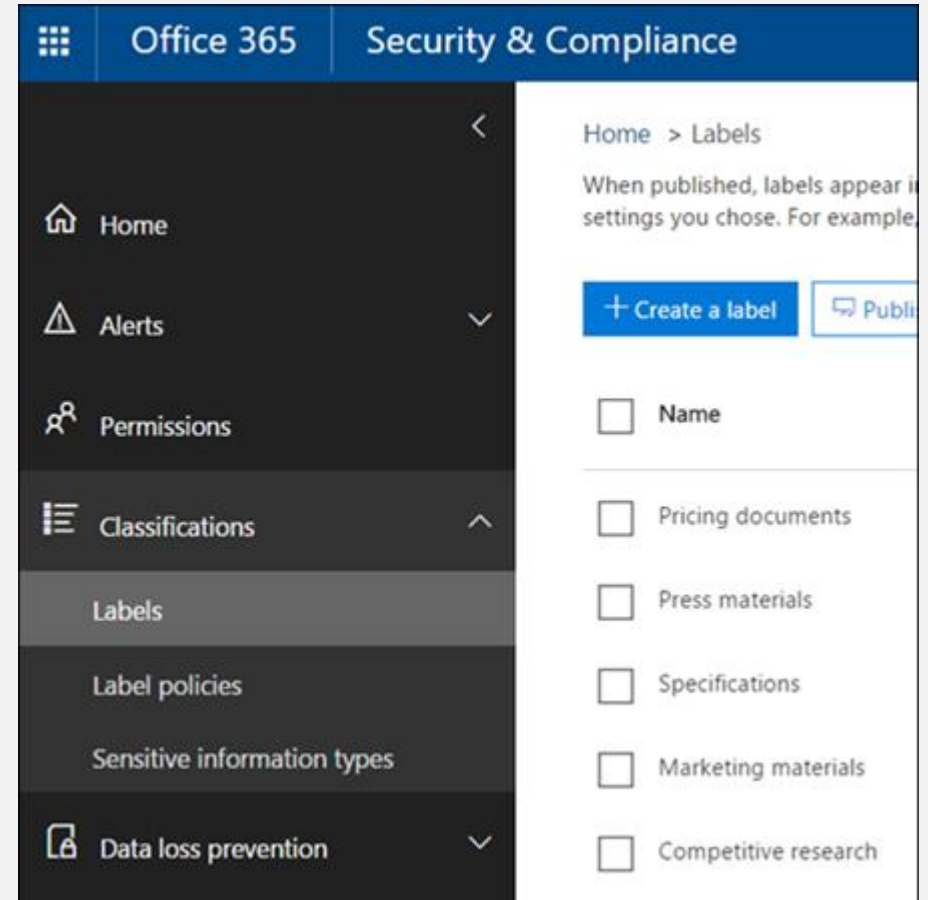


File Shares



Office 365 Labels

- ✓ Classify using labels to implement retention and records management across Office 365
- ✓ Users can apply labels manually
- ✓ Labels can be applied automatically



Driving Lifecycle Outcomes with Labels

- ✓ Enforce retention
- ✓ Trigger disposition reviews
- ✓ Start retention based on various criteria

Create a label to help users classify their content.

✓ Name your label

Label settings

Review your settings

Label settings

Retention ⓘ

☒ On

When this label is applied to content...

☒ Retain the content ⓘ

For this long... 7 years

What do you want to do after this time?

☐ Delete the content automatically. ⓘ

☒ Trigger a disposition review. ⓘ

Notify these people when there are items ready to review

☐ Nothing. Leave the content as is. ⓘ

☐ Don't retain the content. Just delete it if it's older than ⓘ

1 years

Retain or delete the content based on

when it was created ⓘ

when it was created

when it was last modified

when it was labeled


an event

Label classification




☐ Use label to classify content as a "P" an event

Back Next Cancel

Label Policies (Scope)

Office 365

Security & Compliance

1PO

Home

Alerts

Permissions

Classifications

Labels

Label policies


Sensitive information

Data loss prevention

Data governance

Threat management

Publish labels so users can apply them to their content.

Choose labels to publish

☐ Publish to these locations

☐ Name your policy

☐ Review your settings

Choose locations

☒

Exchange email

All

None

Choose recipients

Exclude recipients

☒

SharePoint sites

All

None

Choose sites

Exclude sites

☒

OneDrive accounts

All

None

Choose accounts

Exclude accounts

☒

Office 365 groups

All

None

Choose groups

Exclude groups

Back

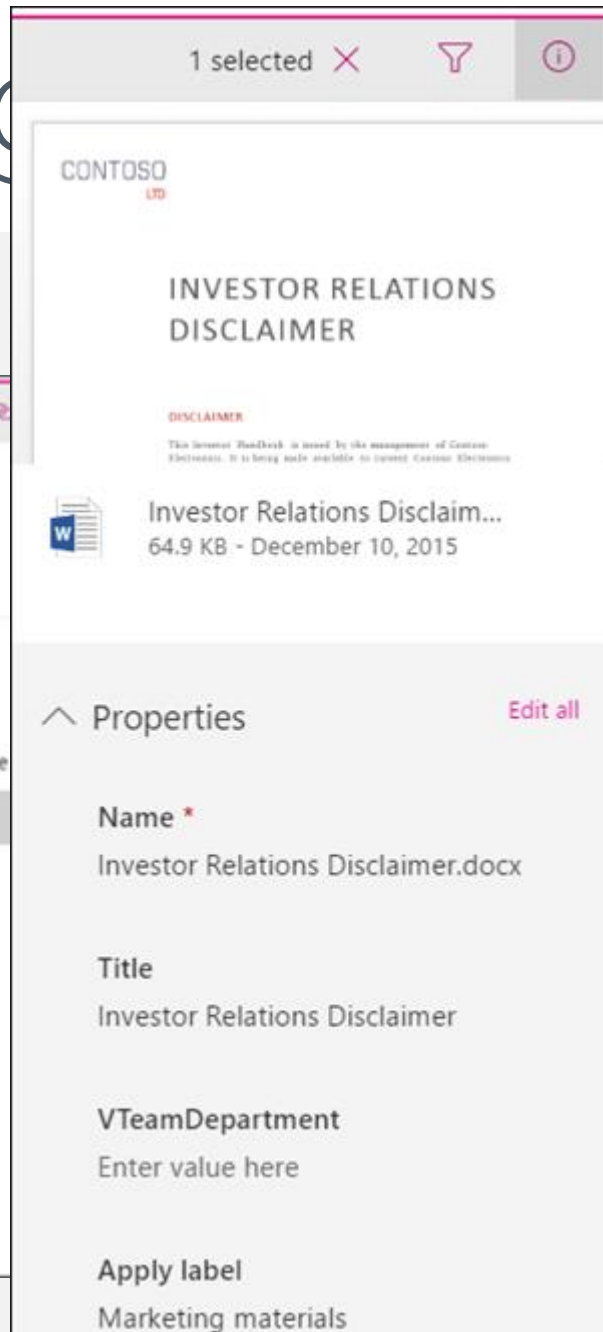
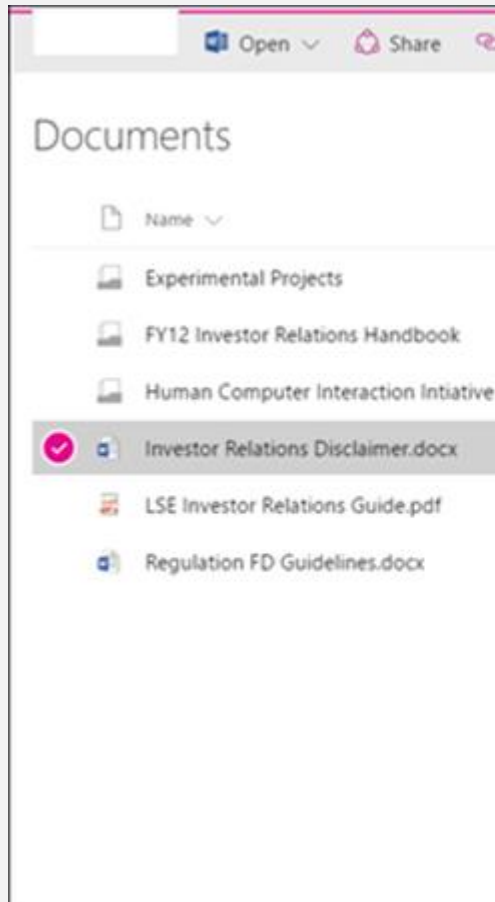
Next

Cancel

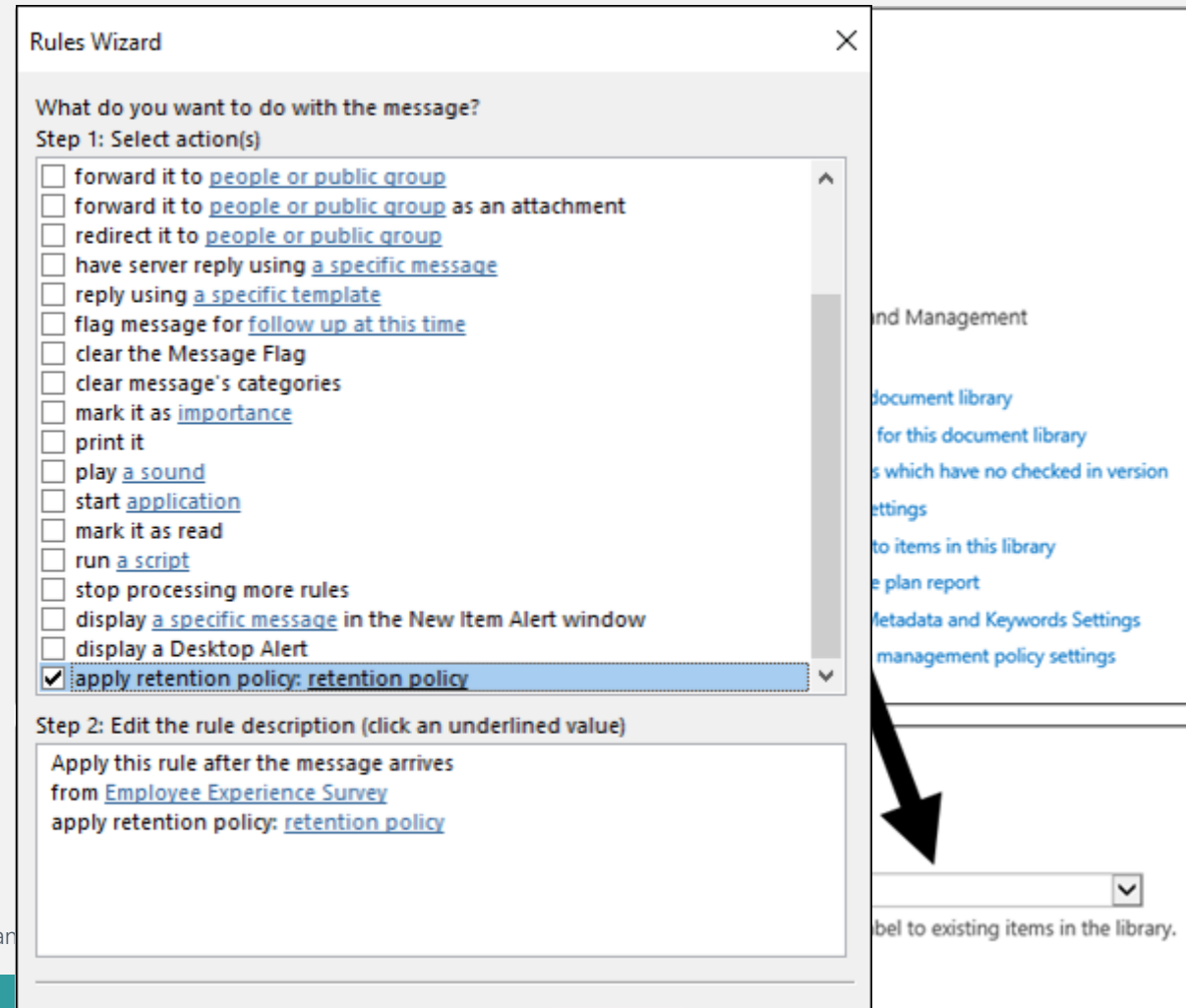
Feedback

Applying

Manually



Automatically



Event settings

What event type is this related to? ⓘ

You'll only be able to choose one event type that's currently associated with existing labels of this event type.

[Choose an event type](#)

What are the asset IDs related to this event? ⓘ

Identify the items in Exchange, SharePoint and OneDrive that are related to this event, with the event type you chose will be retained.

Keywords for items in Exchange ⓘ

Enter words or phrases

Enter keywords and operators here just like you would for a Content Search.

"Product CG"

Asset IDs for items in SharePoint and OneDrive ⓘ

Enter asset IDs

Enter the document property:value pair that your organization uses to associate content with this event type.

ComplianceAssetID:"Product CG"

When did this event occur? ⓘ

2017-12-06

The date that you select here will be used as the start of the retention period.

Event type

+ Create

- ☐ Name
- ☐ Expiration or retention
- ☐ Product lifetime
- ☐ Employee activity
- ☐ Acquisition

Files > Documents

✓	Name	Modified
✓	PerimeterFeaturePrior...	* A few seconds ago

Drag files here to upload

PerimeterFeaturePrioritization.xlsx

This item is not shared

[Manage access](#)

Properties

Name *
PerimeterFeaturePrioritization.xlsx

Apply label
Product Development Files

Title
Enter value here

Asset ID
Product CG

Retain or delete the content based on an event ⓘ

Content that has this label applied will be associated with the type of event you choose. When there's a specific occurrence of this event type, you'll create the actual event to start the retention process. ⓘ

Event type: Employee activity

[Edit](#)

4 item(s) loaded.

[Close](#)

Label classification

☒ Use label to classify content as a "Record" ⓘ

Label classification

☐ Use label to classify content as a "Record" ⓘ

The retention actions can be triggered by an event that you create.

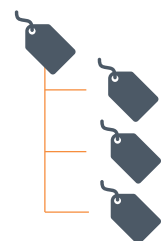
when it was last modified
when it was labeled
an event

Reporting and Auditing

The screenshot displays the Office 365 Security & Compliance center. The left-hand navigation pane includes links to Alerts, Permissions, Classifications, Data loss prevention, Data governance, Threat management, Mail flow, Data privacy, Search & investigation, Content search, Audit log search (which is the active page), eDiscovery, Productivity app discovery, Reports, and Service assurance. The main content area is titled 'Audit log search' and includes a breadcrumb 'Home > Audit log search'. Below the title is a descriptive paragraph about searching the audit log. The search interface features a 'Search' section with a 'Clear' button, a dropdown for 'Activities' set to 'Modified file', and date filters for 'Start date' (2018-08-30 to 00:00) and 'End date' (2018-09-07 to 00:00). There is also a 'Users' filter set to 'Paul Olenick' and a 'File, folder, or site' search box. A 'Results' section indicates '2 results found' and includes 'Filter results' and 'Export results' buttons. The results are presented in a table with columns for Date, IP address, User, Activity, Item, and Detail.

Date	IP address	User	Activity	Item	Detail
2018-09-06 15:58:54	207.140.28.134	paul@paulolenick.com	Modified file	PerimeterFeaturePrioritizati...	Modified in "Documents/D..."
2018-09-06 12:28:54	207.140.28.134	paul@paulolenick.com	Modified file	PerimeterFeaturePrioritizati...	Modified in "Documents/D..."

Must-haves for a Records Solution...



Defining Classifications	Associating outcomes with Classifications	Deploying Classifications and Outcomes to relevant locations	Classifying Content	Reporting and auditing
Centralised definition of file classifications	Retain/Expire/Export according to policy	Classification branches available to appropriate audiences	Ensure accuracy while minimising the burden on end users	Monitor, audit and prove compliance



O365 Native Considerations

One Label, One Outcome

Limited criteria and Triggers

No Hierarchy

License model

Labels that declare records must be applied manually

No Export

No Hybrid

No Physical Records



How AvePoint can Help: Live Demo

Recap – How AvePoint Fills These Gaps

One Label, One Outcome

Limited criteria and Triggers

No Hierarchy

License model

Labels that declare records must be applied manually

No Export

No Hybrid

No Physical Records



AvePoint Records – Upcoming Releases

Coming Soon



Related Records



Records Explorer



Disposal holds



New autoclassification engine



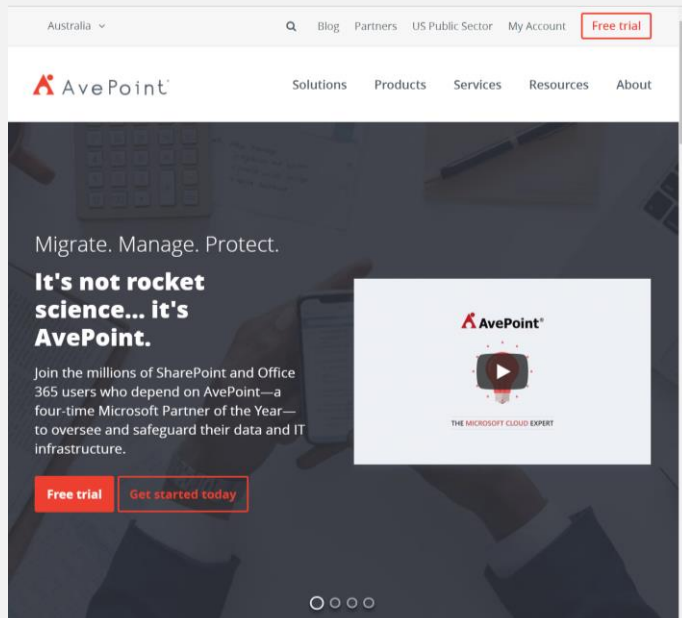
Support for new sources



**Additional integration with O365
Labels**

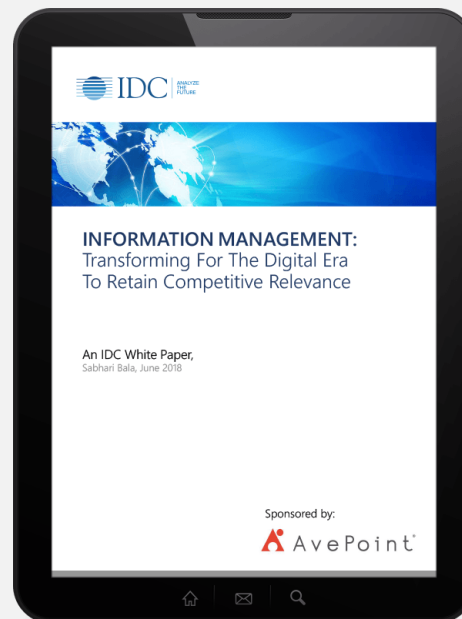
What's Next

Speak to a SME



<https://www.avepoint.com/au/>

White Paper



<https://www.avepoint.com/au/ebook/records-white-paper>

Records E-Book



<https://www.avepoint.com/au/ebook/cloud-records-ebook>



thank you

Gracias

ευχαριστώ

Danke

Grazie

благодаря

Hvala

Obrigado

Kiitos

شكراً

Tak

Ahsante

Teşekkürler

متشكراً

Salamat Po

감사합니다

Cám ơn

شكريه

Terima Kasih

Dank u Wel

Děkuji

நன்றி

Köszönöm

ありがとう
ございます

ໂພນຄຸນຄວັບ

Dziękuję

谢谢

Tack

Mulțumesc

спасибо

Merci

תודה

多謝晒

дядкую

Ďakujem