


















Things to consider when evaluating Microsoft 365 Purview for Records Management

FEATURE	 MICROSOFT 365 RETENTION LABELS (E3)	 MICROSOFT 365 RECORDS MANAGEMENT (E5)	 AVEPOINT RECORDS AND AVEPOINT CLOUD RECORDS
HIERARCHICAL TAXONOMY	NO	NO BUT... You can add file plan categories to retention labels although this is restricted to three levels	YES 👍
FILE PLAN MANAGEMENT	NO	YES 👍 BUT... File plan must be in a flat structure	YES 👍 AND... Taxonomy terms can be active, inactive or removed altogether. In addition, terms can be active for a preconfigured 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 👍 BUT... Only a single disposition outcome (e.g. retain document, declare record, destroy) can be applied to a label, however an action can be configured to apply a new label	YES 👍 AND... Rules can include both lifecycle and end of life disposition actions, including record declaration, move to new locations, export, archive and defensible destruction
EXPORT TERMS/LABELS WITH ASSOCIATED RETENTION RULES	NO	YES 👍	YES 👍
IMPORT TERMS/LABELS	NO	YES 👍 BUT... Labels can only be configured in a flat structure	YES 👍
APPLY TERMS/LABELS TO ANY MICROSOFT 365 ARTEFACT	NO Microsoft 365 only supports the application of labels to documents and emails however defaults can be applied at a Document Library or folder level.	NO Microsoft 365 only supports the application of labels to documents and emails however defaults can be applied at a Document Library level.	YES 👍 AND... Labels can be applied to documents, list items, emails etc., as well as Microsoft 365 containers such as folders, libraries, sites.

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MANAGE RECORDS 'IN PLACE' WITHIN MICROSOFT 365	YES 👍	YES 👍	YES 👍
MANAGE RECORDS 'OUT OF PLACE' WITHIN MICROSOFT 365	YES 👍 BUT... Microsoft 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 👍 BUT... Microsoft 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 👍 Information can be managed in the location it was created or moved to another location such as an archive or Records Center according to business needs
APPLY TERMS/LABELS WITHOUT USER INTERVENTION	NO	YES 👍 There is up to 7-day latency for auto classification actions. SharePoint Syntex can also be used to apply a retention label (subject to additional licensing)	YES 👍 AND... Cloud Records can read and act on the metadata applied by trainable classifying tools such as SharePoint Syntex
DECLARE AN ITEM AS AN IMMUTABLE RECORD	YES 👍 BUT... The label to declare an item as a record must be applied by a user and record metadata can still be changed. A regulatory record can be configured. However once this has been applied, the retention period cannot be adjusted or removed (even by a Global Administrator). A regulatory record label cannot be applied using auto labeling policies, only retention label policies. Regulatory Records are not available by default and must be enabled by PowerShell scripts.	YES 👍 BUT... The record metadata can still be changed and the same issues with retention period adjustments, auto labeling and PowerShell scripting remain.	YES 👍 AND... Record declaration can be automated, and the record (including metadata) is immutable.

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DECLARE AN ITEM AS A RECORD WITHOUT USER INTERVENTION	NO	YES 👍 BUT... There is up to a 7-day latency for the retention label declaring the record to be applied and metadata can still be edited following record declaration. Metadata columns used for auto application need to be mapped as a refinable string in SharePoint search and Keyword Query Syntax language needs to be used to specify searchable phrases and properties.	YES 👍
RECLASSIFY ITEMS	NO	YES 👍 BUT... Relabeling can only happen on 200 items at a time	YES 👍 AND... Content classified by Cloud Records can be reclassified in bulk with no limit on the number of items
APPLY METADATA DURING RECORD DECLARATION	NO	NO	YES 👍
MANAGE ITEMS WHETHER THEY HAVE BEEN DECLARED RECORDS OR NOT	YES 👍	YES 👍	YES 👍
REQUIRE A RETENTION LABEL OR TERM TO BE APPLIED	NO	NO	YES 👍
EXPORT TO LONG TERM PRESERVATION FORMAT	NO	NO	YES 👍 AND... Export formats are certified against government standards
MANAGEMENT OF NON- ELECTRONIC INFORMATION	NO	NO	YES 👍 Manage physical and electronic information using the same file plan or classification scheme
AUDIT TRAIL RETENTION	YES 👍 BUT... Audit trails are only retained for 90 days	YES 👍 BUT... Audit trails are only retained for 1 year	YES 👍 AND... Audit trails are retained for an indefinite period of time

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DEFENSIBLE DESTRUCTION	NO	YES !👍 BUT... Defensible destruction is available in the Disposition tab - Disposed Items list and details of items will only be kept for 7 years after the item was disposed	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 process and the ability to comprehensively audit all retention and disposal actions.
OBLITERATION ON DESTRUCTION	YES !👍 BUT... Disposed records spend 93 days in a recycle bin before being permanently removed	YES !👍 BUT... Disposed records spend 93 days in a recycle bin before being permanently removed	YES !👍
DISPOSITION OR DISPOSAL TRIGGERS	YES !👍 BUT... Disposition triggers are limited to: <ul style="list-style-type: none"> • Date Created • Date Modified • Date Label Applied Event based retention is supported although requires significant configuration and oversight	YES !👍 BUT... Disposition triggers are limited to: <ul style="list-style-type: none"> • Date Created • Date Modified • Date Label Applied Event based retention is supported although requires significant configuration and oversight	YES !👍 AND... Disposition or disposal processes can be triggered from any metadata captured in the system, either date or event based.
DISPOSITION OR DISPOSAL PROCESS KICK OFF	YES !👍 BUT... Is run automatically each week	YES !👍 BUT... Is run automatically each week	YES !👍 AND... Can be run on a defined schedule or triggered on demand
MULTI-STAGE DISPOSITION OR DISPOSAL APPROVAL PROCESS	NO	YES !👍 Up to five stages of approval can be configured, however if items are rejected, the process for those items will not move forward.	YES !👍 Up to five approval stages can be configured with each approver required to endorse or reject decisions before the process can be completed.
CONFIGURABLE REPORTING	YES !👍 BUT... Reports are combined with security and compliance reporting	YES !👍 BUT... Reports are combined with security and compliance reporting	YES !👍 AND... Reports have been specifically designed for records management process and actions.

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RECORDS IN HYBRID ENVIRONMENT	<p align="center">NO</p> <p>Labels can only be used in Microsoft 365, they are not available for on-premises SharePoint</p>	<p align="center">NO</p> <p>Labels can only be used in Microsoft 365, they are not available for on-premises SharePoint</p>	<p align="center">YES !👍</p> <p>AND... Terms and rules can be extended across your cloud and on-premises environments as well as physical records and file shares</p>
DISPOSAL APPROVALS	<p align="center">NO</p>	<p align="center">YES !👍</p> <p>BUT... Approvals can only be done 600 items at a time</p>	<p align="center">YES !👍</p> <p>AND... Disposal approvals can be conducted in bulk with no limits of the number of items approved</p>
ARCHIVE CONTENT	<p align="center">NO</p>	<p align="center">NO</p>	<p align="center">YES !👍</p> <p>Records can be sent to an archival repository (like Azure Blob) for longer term management while retaining oversight and management outcomes with Cloud Records</p>
CONFIGURABLE DISPOSITION REVIEWS	<p align="center">NO</p>	<p align="center">YES !👍</p> <p>BUT... Options are limited to customizable emails with a follow up email sent within 7 days if no action has been taken on the task</p>	<p align="center">YES !👍</p> <p>AND... Options include scheduling reminder emails, escalations if tasks are not completed, limiting the number of disposal delays and length of time disposal can be delayed.</p>