



Take control of your physical and electronic content.

Advanced Information Management



Manage Physical & Electronic Records

Manage content from multiple electronic sources, as well as physical records, in a centralized SaaS platform. Oversee information lifecycle from creation to destruction or archival, actioning content from a modern, intuitive interface. Take a high-level look at your content from the dashboard or dive deep into the details with extensive out-of-the-box reporting.



Decrease Storage Costs & Fees

Reduce data storage costs and mitigate overage fees by applying automated retention and disposal rules to manage your Microsoft 365, Exchange Online, SharePoint on-premises, file systems, and any system you are using. Manage content that has been moved to a supported archival repository, including Azure Blob, Amazon S3, DropBox and Box, and easily get it back via ReCenter.



Meet Organizational & Regulatory Standards

Implement robust information management practices to ensure that you're not holding on to too much—or too little—information. Reviewed and certified by leading global authorities, Cloud Records is built to achieve compliance with regulatory requirements and your company's own policies. Maintain oversight with built-in reporting and auditing.



Improve Productivity & User Experience

Give your end users a better experience by lifting the burden of information management off their shoulders. Plus, with employees spending less time searching for data or re-creating content that can't be found, you'll see productivity gains, as well.

Information is one of your most important assets – treat it that way

When it comes to effectively managing your organization's information, the considerations go beyond just end-of-life. With AvePoint Cloud Records, you can easily automate business rules to manage your entire content lifecycle—from creation to classification and retention. Electronic content from Microsoft 365, SharePoint on-premises, Exchange Online, social media, file systems, and any system you are using is managed directly alongside physical records, achieving quantifiable business outcomes without user intervention. Plus, delegated administration allows defined groups or users to manage content repositories and access security-trimmed search results and reporting. Backed by AvePoint's powerful security and governance framework, Cloud Records is FedRAMP (moderate) Authorized, IRAP Assessed, and VERS and NARA compliant.

CLASSIFICATION & TAXONOMY

Manage a classification scheme or taxonomy and push terms to records 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 Microsoft 365.
- Easily view and manage all the records environments to associate file plan terms with rules for retention or disposal, apply term settings, and assign content to business owners.
- Use metadata to help quickly locate the records you need, applying Boolean operators and up to 10 criteria fields. Take action directly from the search results to manage disposal holds, reclassify documents, declare content as a record, and more.
- Configure user input as manual or automatic, depending on an organization's requirements.
- Configure auto classification rules to apply file plan terms or classification to content in Microsoft 365, SharePoint on-premises, and file systems.
- Manage and classify emails in place in Exchange Online by applying appropriate Records terms to emails, or move emails and attachments from mailboxes into SharePoint Online to take an out of place approach.
- Connect Cloud Records to the information system you are using to apply consistent lifecycle management processes and policies across all your information environments

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 electronic and physical 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.

RETENTION & DISPOSAL RULES

Manage your information lifecycle with multiple outcomes for content.

- Associate lifecycle outcomes with business rules that remove, retain, archive, or destroy content.
- Add records metadata to content as part of a business rule, including the addition of a Microsoft 365 retention label.
- 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.
- 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.
- Flexibly approve, reject, or escalate records according to decisions of nominated business owners, all from a single interface.
- Utilize a flexible manual approval process (up to five steps) with a drag-and-drop workflow builder for record disposal approval.
- Relate and manage items together, whether electronic or physical, choose to destroy the related record with its parent or separate them to be managed as single items.

PHYSICAL RECORDS

Manage physical items—including boxes, folders, and records.

- Records managers can configure locations where physical records are stored and can create different physical templates for boxes, folders and records, assigning or inheriting metadata to each.
- End users can create requests for the loan of physical folders or boxes and request the creation of new physical items triggering an approval workflow to the records management for oversight and review.
- Apply access controls to physical records for enhanced security.
- Perform simple space management tasks using physical records reporting.
- Physical records explorer gives the Records Manager full oversight of what's happening in the physical world, including creation, movement and tracking of all physical information across the organization.
- Scan the Cloud Records barcode of physical containers via the AvePoint Records mobile app to perform actions in bulk, such as moving or updating item status.

For a comprehensive list of new features in this release, please view our [release notes](#).

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