

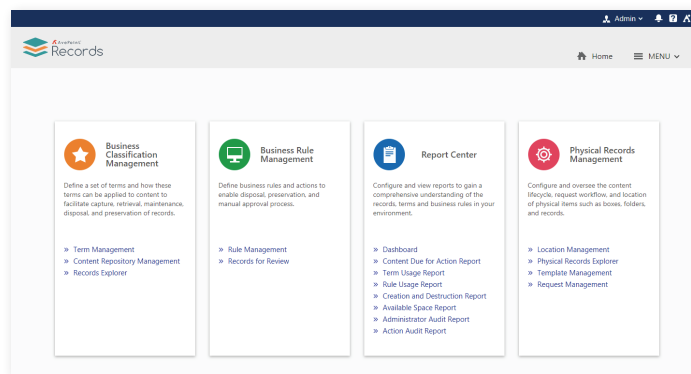
# AvePoint Records

## Information Management Across Your Organization

A revolution through the information lifecycle.

### For Your Organisation

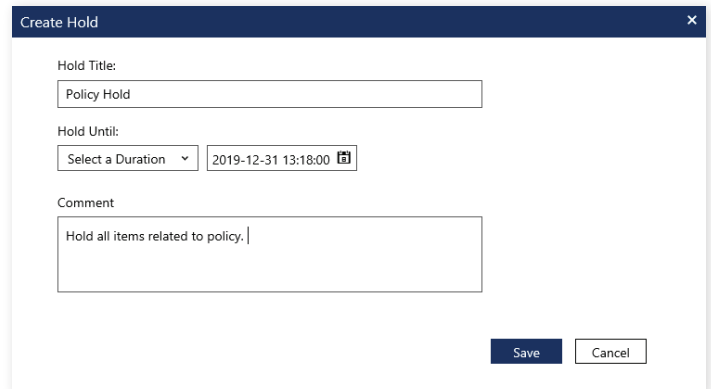
- Reduce risk using real-time or scheduled scanning against pre-defined business rules to ensure compliance with organizational policy
- Drive business efficiency and unlock the maximum value of your SharePoint, Microsoft 365, File System content alongside physical records investment by extending its capabilities with AvePoint's award-winning software
- Automatic classification enables quick and easy configuration on the appropriate rules to apply file plan terms or classification to content in SharePoint, Microsoft 365 or File System



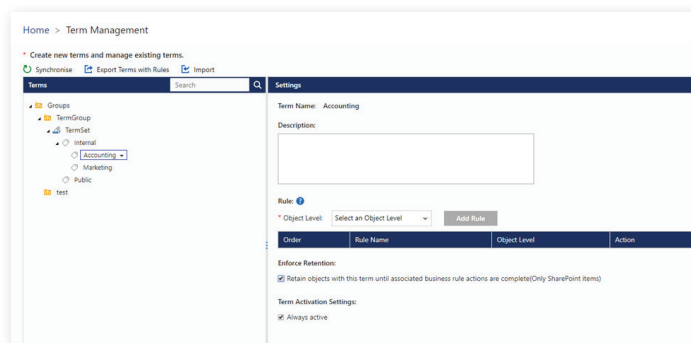
Unified interface to manage SharePoint information management rules

### For Your Information Manager

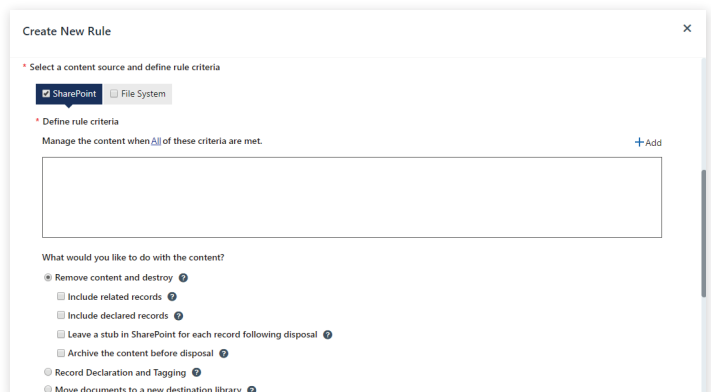
- Unified interface to apply information management policies to all electronic and physical content, regardless of format, from the time of creation through to decisions on retention, disposal, or transfer for both electronic and physical records
- Full taxonomy management capability synchronizes to Managed Metadata term stores in real time or on a schedule
- Ensure a compliant information lifecycle with standards and policies using seamlessly integrated business rules that are invisible to end users



Create hold for records



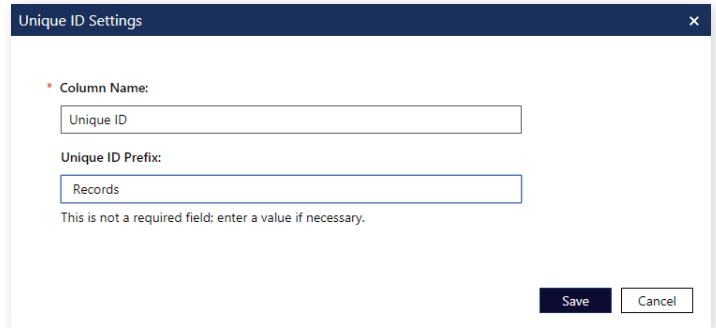
Business classification scheme



Disposal rules

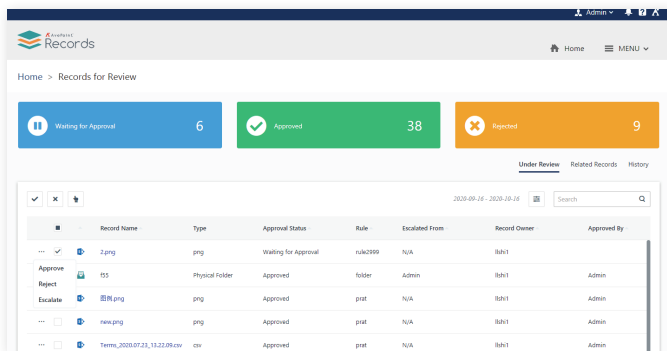
- Archive content to long-term preservation formats in compliance with information management policies and transfer to secondary storage or archival facilities as required – with the option to remove the SharePoint item, leave an evidentiary stub, move documents and declare as records following the disposition process or tag with Microsoft retention label
- Prevent future disposal of content that's subject to a hold by allowing end users to safely access, edit and utilize it knowing content won't be disposed until the hold's been lifted
- Dispose, declare or move SharePoint and File System content when predefined criteria are met to manage and maintain your compliant information lifecycle
- Manage information the way you need to either at a container or individual item level – whether documents, items, folders, libraries, lists, sites, and site collections – using an inheritance model
- Take advantage of the out-of-the-box solution options ensuring full support and upgrade paths without SharePoint, Microsoft 365 or File System customizations
- Flexibly approve, reject, or escalate records prior to disposal actions, according to the decisions of nominated business owners, all from a single interface
- Perform actions directly on SharePoint, File System content and physical records to reclassify documents, add or manage relationships, manage holds, and more, via one interface

- Manage physical records by creating locations and files with optional approval processes and built-in workflows to manage physical file creation and movement
- Create different physical templates or template suites for boxes, folders and records, assigning or inheriting metadata to each
- Configure unique identifiers for all content according to a predefined pattern, whether it is declared a record or not, across your entire environment

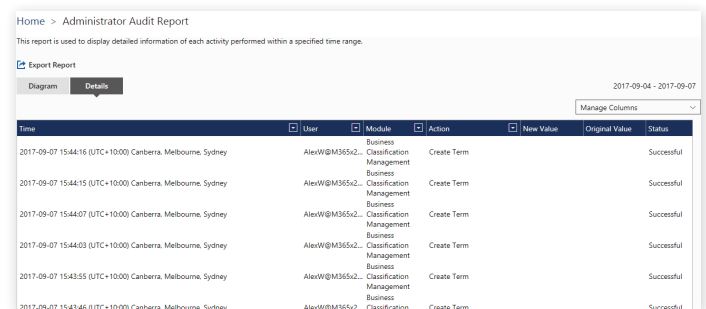


Unique Identifiers

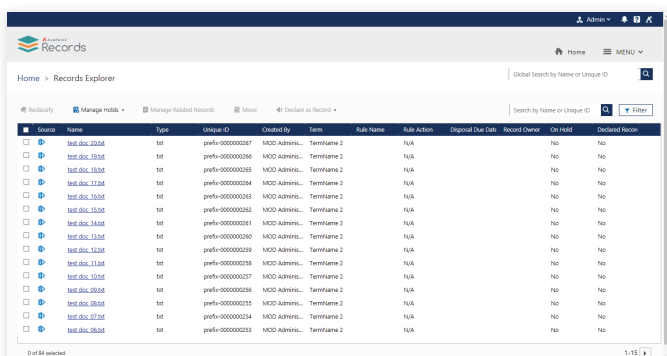
- Report and download classification utilization, rule associations, content due for disposal, available space, and content creation and destruction for all records, whether electronic or physical, as well as actions executed within Records
- Ensure records are safely stored without inadvertent or intentional deletion by configuring retention policies that override end user deletion actions
- Move content from File System to SharePoint or Microsoft 365 directly using the Records Explorer to ensure information is stored and managed in the correct location



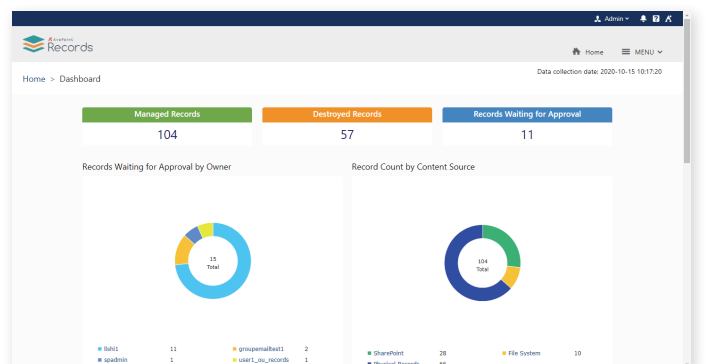
Multi stage manual approval Process



Report on all actions executed within AvePoint Records



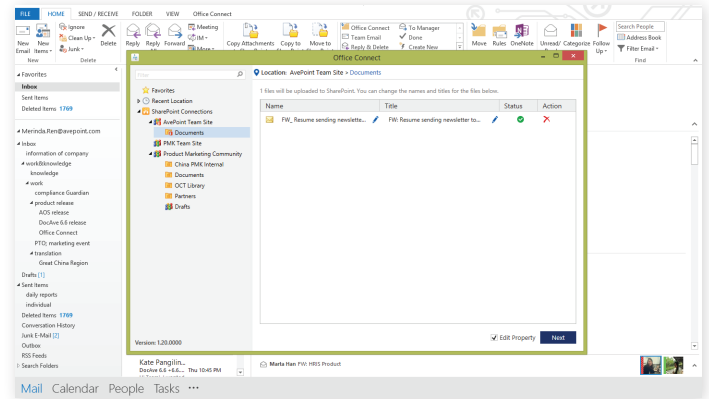
Records Explorer



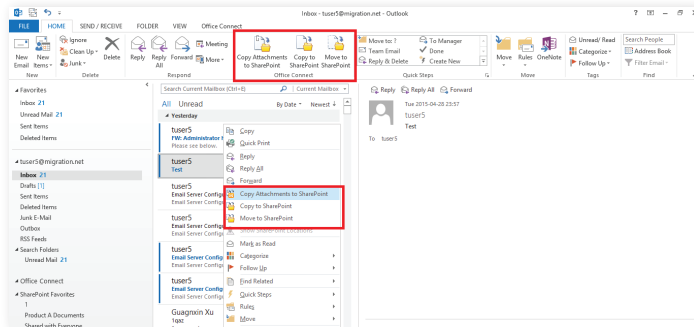
Records Management Dashboard

## For Your End Users

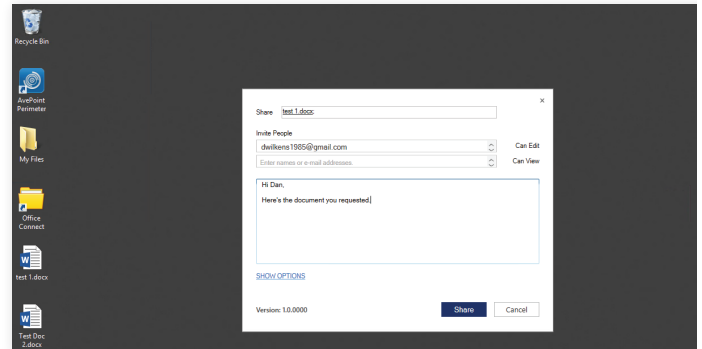
- Request and manage both electronic and physical records all through a single-pane-of-glass interface
- Create requests for the loan of physical folders or boxes as well as request the creation of new physical items triggering an approval workflow to the records manager for oversight and review
- Drive adoption by integrating pre-existing Microsoft desktop applications with SharePoint or Microsoft 365
- Greatly reduce the size of personal inboxes by saving emails to SharePoint or Microsoft 365 and replacing attachments with links
- Break down data silos and streamline workflows by allowing users to effortlessly surface Microsoft Outlook, Microsoft Office, and Windows File Explorer content via SharePoint or Microsoft 365, creating a single, central collaboration hub
- One-click sharing from SharePoint or Microsoft 365 to Outlook automatically grants “Contribute” or “Read” access permissions according to the “To” and “CC” email fields, respectively



Surface your local content to SharePoint with one single click



Seamlessly integrate Office with SharePoint



One-click and secure sharing

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

## How to Buy AvePoint Products

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