

Microsoft 365 Records Management Delivers Flexible Solution for Managing High-Value Content



Following a steadily growing trend, experts estimate that 94 percent of workloads will process in the cloud in 2021. For many organizations looking to move services to integrated platforms and consolidate costs, [Microsoft 365](#) provides a logical solution. And now, with Microsoft 365 Records Management, organizations benefit from greater security and compliance options.

Powerful Information Governance Features

Even before the upheaval of 2020, the business world hailed digital transformation as a key strategy for success. The pandemic simply quickened the pace, as organizations leveraged the cloud and other technologies to solve business problems. And as organizations and customers alike turn their focus to data, information governance takes on greater importance.

Microsoft defines [information governance](#) as keeping what you need and deleting what you no longer require. To facilitate this process, Microsoft 365 provides tools to manage high-value content through workflows and labels. Thus, information governance allows organizations to meet regulatory recordkeeping obligations, protecting both the business and its customers.

Define Retention at Folder or File Level

Microsoft uses retention labels and policies to ensure [regulatory compliance](#). For instance, users can apply retention labels to specific items, such as emails or documents. These labels travel with the item, no matter where it lives.

On the other hand, organizations can define retention policies at the folder level. Instead of affecting a single item, however, retention policies govern what happens to everything within the folder.

Users work with content as normal. Behind the scenes, the retention settings ensure that when an item is edited or deleted, the system retains a copy of the item in a preservation hold library or recoverable items folder. This protects sensitive content without interrupting the normal workflow.



Central Workspace Streamlines Compliance

Administrators manage compliance through the Microsoft 365 Compliance Center. Here, they define retention labels and policies and generate reports on label activity, including deletion and disposal records.

Through the Compliance Center, security specialists can also set up automated labeling for sensitive information types using pattern matching. Customers with an E5 license take that a step further with trainable classifiers that they can customize to meet their needs.

Finding Success with Microsoft 365 Records Management

[Microsoft 365](#) delivers a powerful solution for records management. For starters, its place within the Microsoft bundle offers the distinct advantages of full integration. Organizations can manage records throughout the business suite, including Outlook, SharePoint, Teams, Microsoft Groups and OneDrive. Data connectors also provide for management of external data.

Additionally, the significant flexibility in defining sensitive content and applying customizable retention labels aids regulatory compliance. It also ensures that critical information remains available for those who need it, while purging unnecessary and redundant data.



At the same time, Microsoft 365 Records Management does have its drawbacks. For instance, some features require an E5 licensing level. Also, users can only apply one retention label to a record, with label application taking up to seven days. Compliance administration can prove quite complex, with a steep learning curve.

For organizations looking to gain optimal value from Microsoft 365 Records Management, Messaging Architects can help. Our consultants blend deep Microsoft knowledge with a thorough understanding of information governance and [regulatory compliance](#). We provide the skilled assistance you need to customize retention and security policies.