

For US State & Local Government CIOs

Microsoft 365 & Active Digital Preservation integration guide

Where Purview retention ends, and
what closes the gap.

Why operational platforms fall short

Platforms like Microsoft 365 are built for collaboration and day-to-day records management, not for ensuring long-term defensibility. By themselves, they don't guarantee:

01

Ongoing format readability

02

Continuous integrity verification

03

Preservation of provenance over decades

As a result, organizations often find that retained records cannot withstand scrutiny without manual intervention or costly reprocessing. This gap only widens as analytics and AI initiatives depend on historical data that must be both compliant and usable.

Case snapshot: modernizing regulatory compliance in the U.S.

The challenge

A mid-sized U.S. city expanded Microsoft 365 across departments, but permanent records spanning 300+ mandated categories were scattered across file shares, local drives and departmental systems. This fragmentation slowed FOIA responses, complicated audits and legal reviews and increased risk as legacy infrastructure was retired.

The approach

The city implemented Preserve365®, embedding Active Digital Preservation™ directly into its Microsoft 365 and SharePoint environment to manage long-term records at scale.

What changed

Automated preservation

Permanent records were transferred and categorized consistently across departments.

Integrity and readability protected

Permanent records were transferred and categorized consistently across departments.

Faster access

Authorized users searched and retrieved preserved records through familiar SharePoint interfaces.

The outcome

FOIA responses and governance reviews accelerated, policy enforcement became easier across departments and long-term records remained secure, readable and defensible as Microsoft 365 adoption and content volumes continued to grow.

“Decommissioning our shared drives and replacing them with SharePoint & Preserve365 helps us better serve city departments and respond to FOIA requests more quickly.”

— City Clerk

From storage to source of truth

By embedding Active Digital Preservation directly within Microsoft 365, long-term content can remain accessible within familiar tools like SharePoint, while the preservation layer continuously safeguards authenticity, readability and provenance in the background. Active Digital Preservation combines:

- **Fixity and authenticity**
- **Managed format migration**
- **Metadata enrichment**
- **Policy-driven lifecycle management**

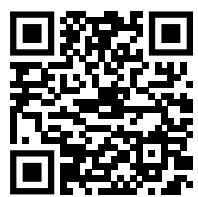
What you can do now

Test readability, not just retention: Open records from 10 years ago. If they cannot be accessed with context intact, they are stored, not preserved.

Pair preservation with your Microsoft 365 strategy: Combine retention labels with format migration, fixity and metadata for long-term records.

Instrument provenance: Capture origin, chain of custody and integrity so AI outputs and audit responses can be defended.

Adopt continuous monitoring: Track format risk and preservation health proactively, not through periodic clean-ups.



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