

Preserve365®

The State of Play of Long-Term Records in Microsoft 365

Learn from over 300 information management, records managers and archive professionals.



Special report for:



Key findings

- The volume of Microsoft 365 records is rising but most organizations have not yet leveraged the power of Microsoft Purview
- Ensuring compliance with information policies & rules remains a big challenge for practitioners but people & technology can help
- Automation, simpler processes & standardization are needed to combat the diverse landscape of record sources, types & stakeholders



**Read on to
learn more**

Introduction

Preserve365® embeds **Preservica's Active Digital Preservation**™ & archiving solution with-in the Microsoft 365 (M365) & Purview experience.

Launching soon **Preserve365** will enable records & information governance (IG) professionals, alongside their archival colleagues, to simplify & automate the archiving & preservation of long-term & permanent records, at scale, without additional expertise or training end users to use new software applications.

As part of our product development we spoke with the records & IG members of the **Preserve365 Early Access Group**. This report summarizes the results of a series of surveys & workshops.





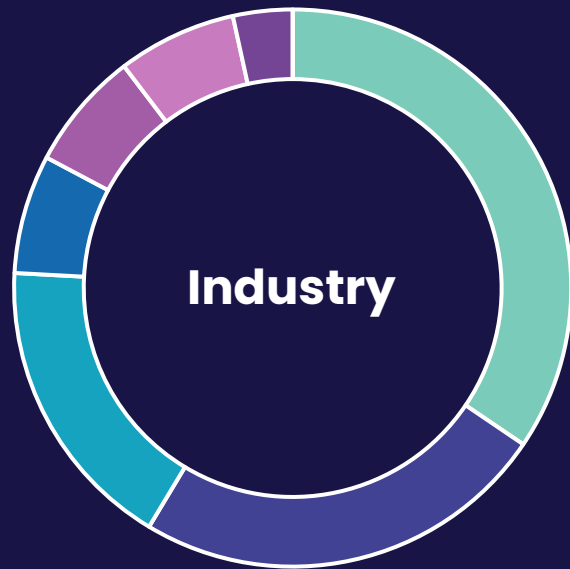
About the **Early Access Group**

The **Preserve365 Early Access Group** was open to organizations of all shapes & sizes. It was made up of forward-thinking information governance (IG), records & archiving professionals who were looking to better understand & adapt to the changing nature of IG in Microsoft 365.

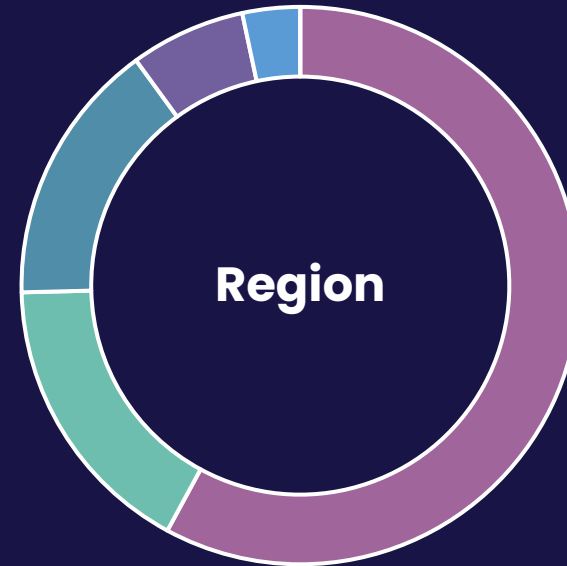
Our EAG members were able to:

- Build their M365 & record preservation expertise
- Connect & collaborate with like-minded organizations
- Stayed up to date with the latest innovations
- Learned more about Preserve365
- **Get hands-on:** Are a part of a Preserve365 product trial

We spoke to & surveyed records practitioners from all around the world



- Government
- Private Business & Corporate
- Education
- Public Sector
- Charity or Non-Profit
- National / Pan-National
- Other



- USA
- UK
- Europe
- Canada
- Other

We wanted to find out...

Each **participant in the records governance & preservation** virtual working group was asked to tell us about their views on:

- The changing records landscape
- The complexities & challenges they face
- Source applications they rely upon
- Their needs & suggested solutions



The volume of M365 records is rising. So will the amount of long-term records



93%

Said Microsoft 365 record volumes are increasing in their organization

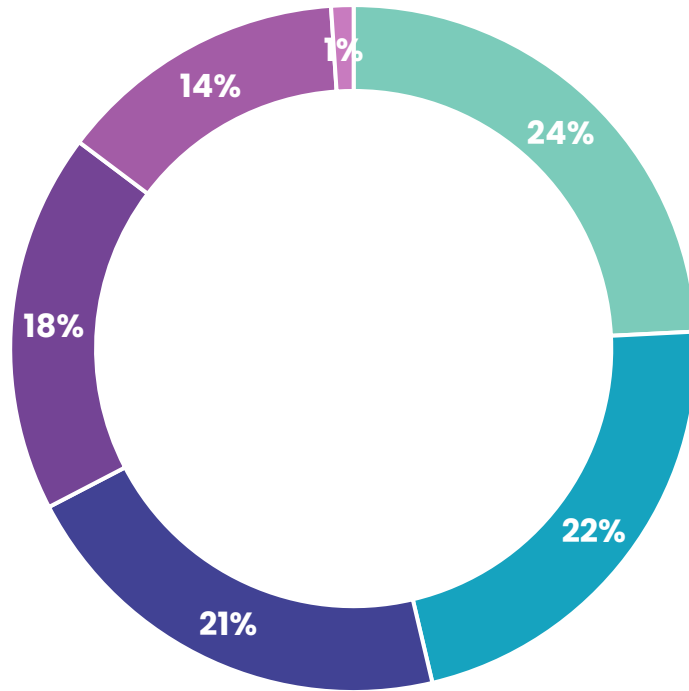


28%

Of M365 records have, on average, long-retention (>7 years) (as reported by members)

Respondents who were able to estimate the split between records (or potential records) vs non-records in their M365 tenants reported, on average, **30%** were records

There are several shared internal & external requirements for keeping long-term & permanent records



The top 3 most common drivers align to internal priorities & value



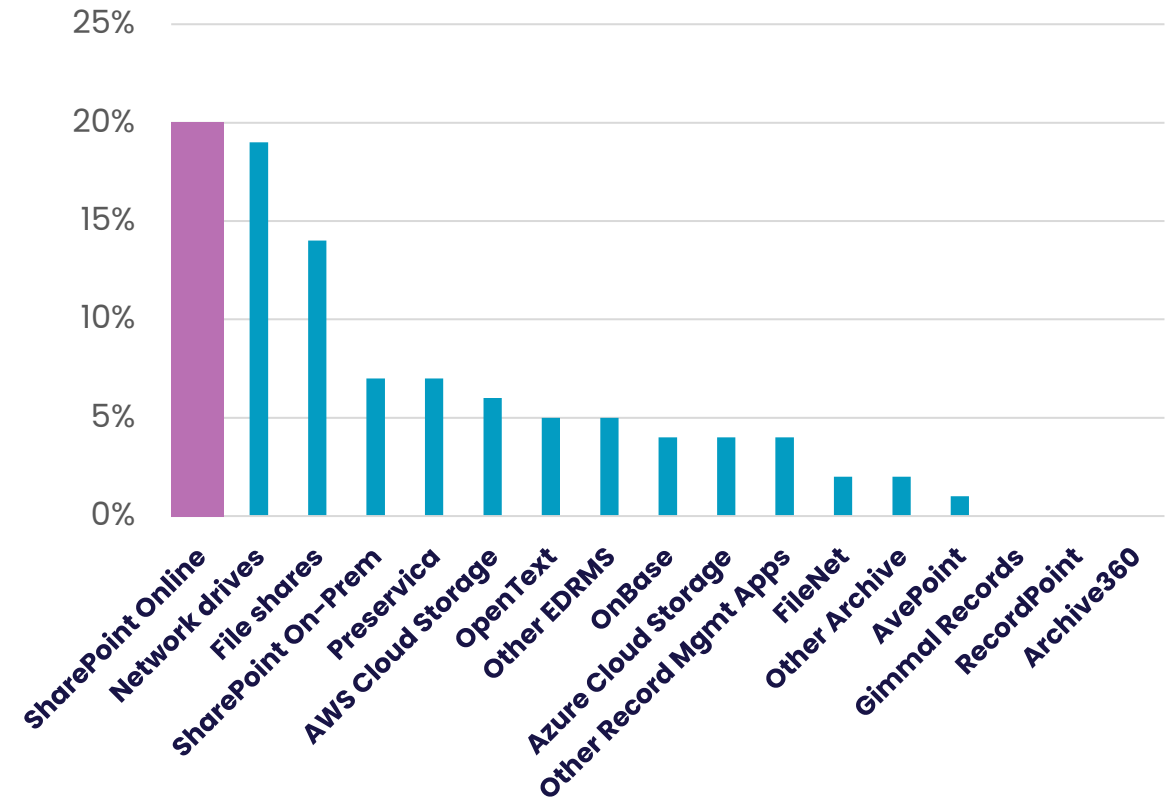
83%

Said that providing efficient & permissible access to archived records is important to them

The content storage & management landscape remains diverse

SharePoint Online is the number one application used to store & manage records

Network drives & file shares are still commonly used. These have potential to store large amounts of **unmanaged** content in addition to the other systems in need of migration & / or consolidation



69%

Of respondents said **SharePoint** is the most important content source. (Email came in 2nd, closely followed by Teams & OneDrive)

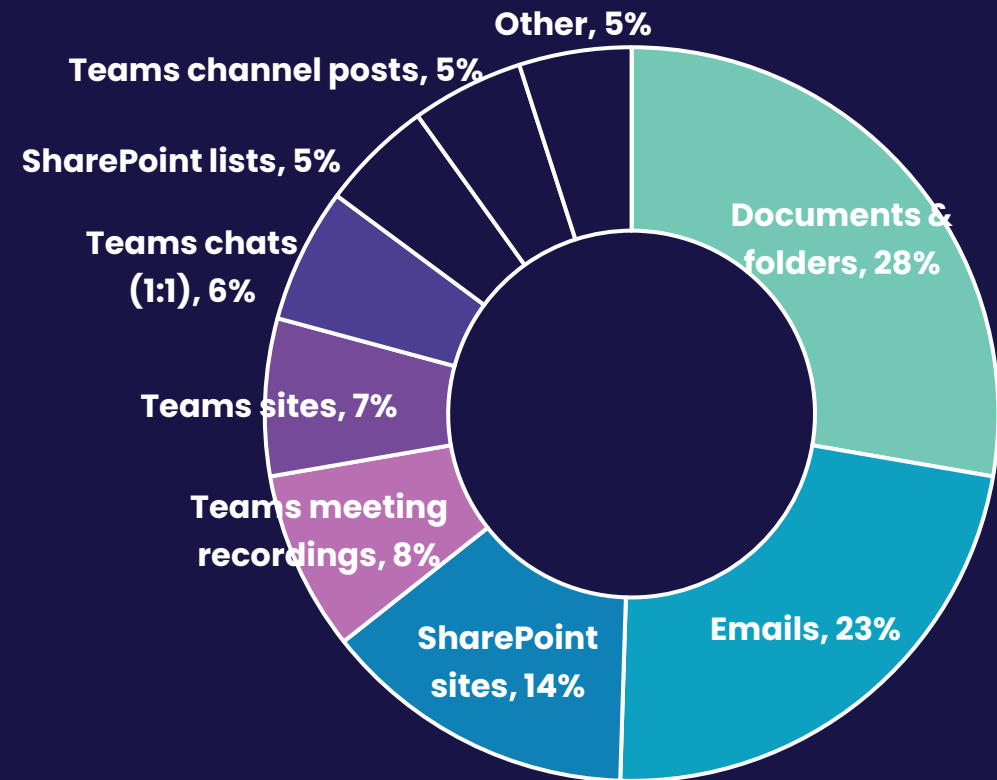
There are many different long-term record types & formats which must be kept discoverable & readable



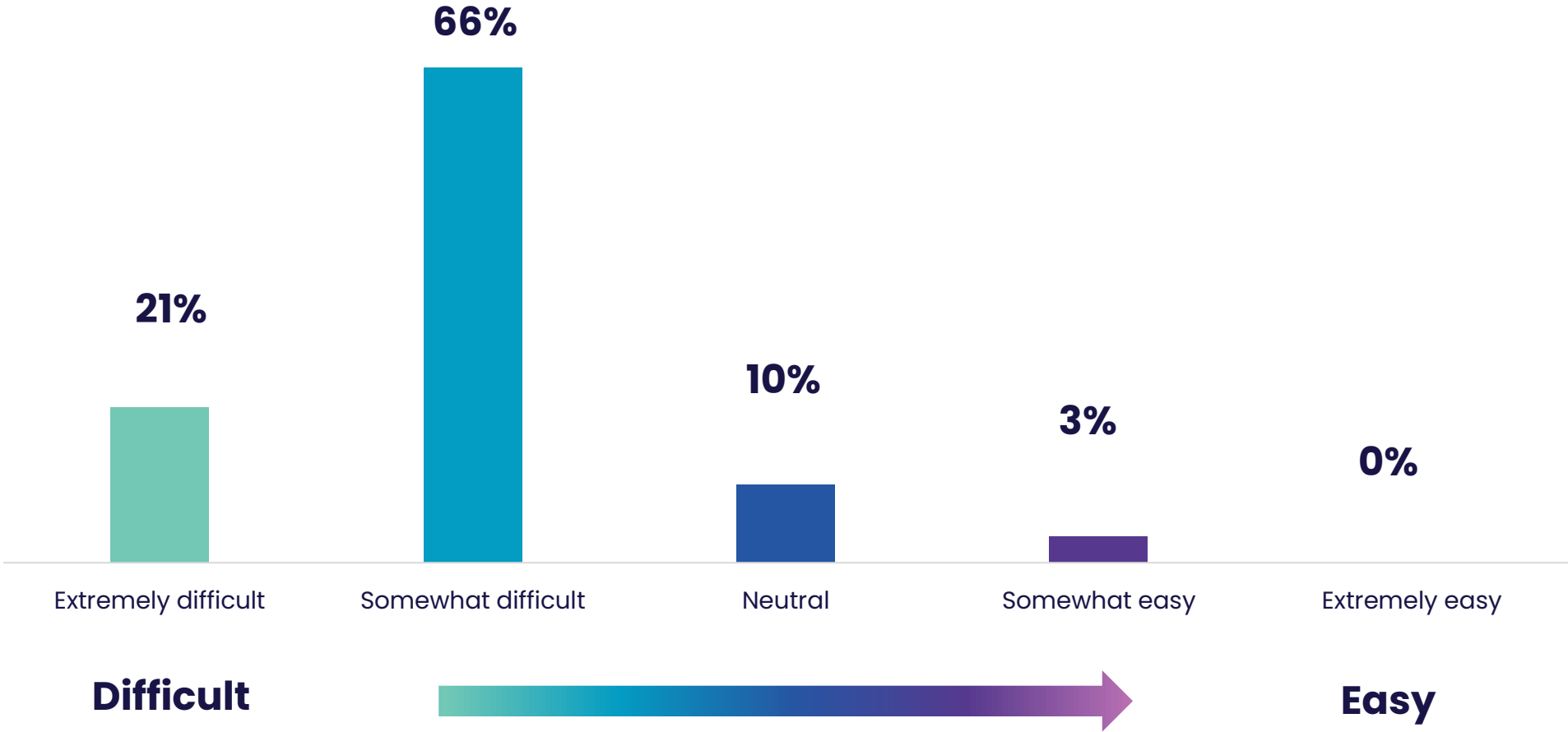
Respondents shared examples of their most common long-term & permanent archival records

- Government decisions
- Property records
- Engineering
- Contracts
- Articles & bylaws
- Board minutes
- Commission meetings & resolutions
- Pension files
- Policies, budgets
- Personnel files
- Intellectual property & trademarks
- Medical files
- Litigation cases

RANKED: Content types that are currently or likely to require long-term/permanent retention



Ensuring compliance with information policies & rules for records is difficult for **87%** of practitioners



Barriers to complying with information policies & rules

Practitioners shared their most common barriers to information policies & rules compliance:

- The scale of record volumes, locations & complexity
- Lack of time & / or skills, & / or knowledge
- Records management isn't prioritized
- The organization wants to keep everything
- Use of files shares & lack of tools to manage records in place
- Systems are frequently changing

Any solution addressing these challenges must be guided by automation, simplicity & standardization





Make working with content owners a success – advice from EAG members

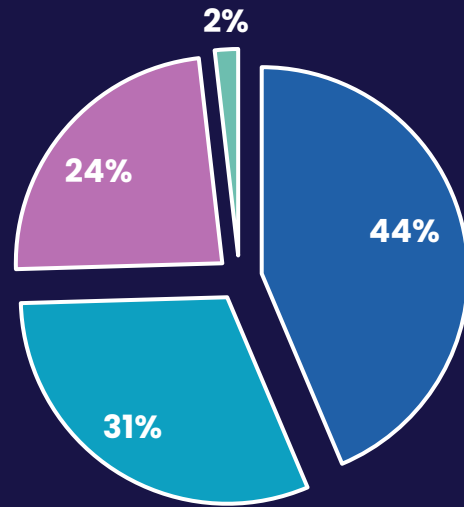
“Alignment is key. Everyone needs to be together in the org, (IM/IT/Business/Senior MGMT)”

“Focus on the productivity / efficiency for end users as a driver”

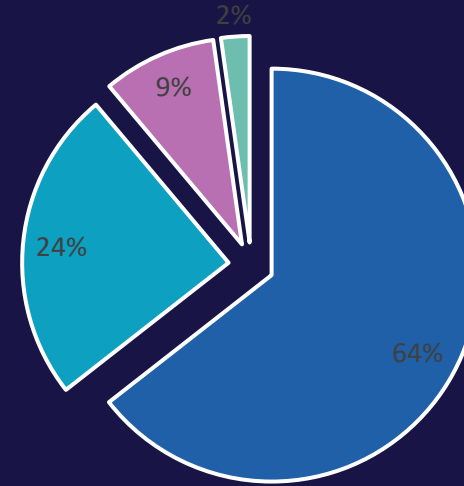
“Invest in Microsoft 365 & records management training”

There is no ONE decision maker or decision point

A broad set of users identify content for archiving & preservation



Archives have a minority role in defining retention rules & disposition actions



RANKED: When should archiving & records preservation begin?

1 Record declared or retention label applied

3 After disposition review

2 At end of retention

4 During retention if inactive

Temporary & permanent records need managing

The M365 Information Governance journey is just beginning

More than half of respondents have E3 or G3 licenses

24% said they use E5 or G5 licenses

Retention policies & labels are the most important Purview capabilities

More than **80%** of respondents already use or plan to use them

Just under half of all respondents use or plan to use records labels, auto-labelling & event triggers

10% Are currently using Purview for RM & IG

Only a few organizations are utilizing the power of Microsoft Purview for retention & / or records management but **97% plan to**

Microsoft 365 supports automated disposition reviews & relabeling but this requires an E5 license.

Most E3 users schedule manual processes or are looking at upgrading to E5 or getting the IG add-on.

Policies & labels work together to simplify, at scale, container level governance plus granular controls for more valuable / at-risk records.

Both capabilities are available with the most common E3/G3 licences.

Records labels, auto-labelling & event triggers can help govern increasing record volumes but require E5/G5 licences.

Preserve365® is aligned with the most important capability of **retention labels** for preserving & archiving records.

Combined with **auto-labelling & disposition relabelling** it is possible to manage preservation & archiving at any point in your organisation's information lifecycle.

Introducing Preserve365®

Unified records archiving & preservation for the Microsoft 365 era

Preserve365® is an automated archiving and Active Digital Preservation™ solution for Microsoft 365, that protects & preserves the integrity, discoverability and readability of long-term and permanent Microsoft 365 records

Set and forget digital preservation

Automate the actions needed to keep records readable over decades

Make archiving easy for end users

Automate long-term record transfers to minimize unnecessary risks & storage costs

Maximize Microsoft 365 investments

Manage & use all via Microsoft 365. **Preserve365** works in lockstep with Microsoft Purview

 Microsoft 365



 **Preserve365** Active Digital Preservation



Video &
audio



Office
Documents



Teams
Chats



Emails &
Files



So much
more

Preserve365 enables you to automate, simplify & standardize archiving & preservation for long-term Microsoft 365 content

Get started with records preservation without Purview



Easily move or copy records, in-app, to Preserve365, in just a few clicks

Make retrieving archived records simpler & faster



Enable users to quickly retrieve & use archived content using Microsoft search

Enable IG policy compliance at scale



Take the burden off end users by using Purview record labels to automate the process entirely

Utilize Microsoft information & user controls



User permissions & compliance rules in Microsoft are automatically adopted by Preserve365

Simplify the adoption of digital preservation



Preserve365 is embedded in Microsoft so end users do not need to learn new tools

Leverage the value of legacy content



Migrate legacy content directly into Preserve365 & empower users to surface it in Microsoft 365

We are Preservica




Leaders in Active Digital Preservation™ archiving for compliance & long-term value protection



Instant access to trusted, actionable records over decades – independent of the originating application



- ✓ ISO 14721
- ✓ SOC 2 Type II

 **500M+**
Collections protected

 **1,094**
Preserved formats

 **4,000+**
User organizations



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