



INFORMATION
LEADERSHIP

Introduction to

iWorkplace

Smart Labels

For Microsoft 365

iWorkplace Smart Labels: Practical R&D at Scale

The Public Records Act requires agencies to manage and protect their documents. This includes disposing of documents when they are legally allowed or required to do so.

In practice with the sheer amount and diversity of content well managed disposal is hard to achieve.

Why bother?

Beyond compliance, a systematic retention and disposal approach will achieve the following:

Protecting your information and avoiding information accidents - in M365 files are not automatically protected on creation. This means that they can be deleted by users. Staff making decisions or sending out information with key information missing can lead to re-work, wrong decisions and bad PR.

Show real progress towards PRA compliance. This can be key to a better audit result and also reduce the risk of information accidents including wrong or incomplete info in OIA responses.

Finding important information - without systematic disposal of low value content, it becomes increasingly hard to find current & high value content. This leads to wasted time and mistakes being made.

Reducing Azure storage costs - without systematic disposal of low value older files, the volume of M365 storage keeps increasing. While storage is cheaper than ever before, information volumes also keep increasing.

Smart Labels – Effective and Efficient

Smart Labels supports your organisation in achieving effective and cost-efficient disposal through:

- ✓ **Compliance from day one.** Apply retention labels as you build your ECM Teams and workspaces or apply retrospectively. Any files added to a Team or workspace will pick up the default retention metadata for the library or folder.
- ✓ **Files are protected from deletion** as soon as they are created
- ✓ **Separate high value content** from the noise with different retention periods for different channels, subfolders, or based on an event (e.g. a case closing or an asset on longer in use).
- ✓ **Simple and scalable.** Mapping and applying retention labels is simplified by setting up default metadata during site or Team provisioning.
- ✓ **Allows iWorkplace Apps you already use to set R&D** - Smart Metadata, Smart Case Files, Smart Provisioning, Teams Framework
- ✓ **Frees up storage.** Retain the files you need and systematically dispose of the ones you don't, freeing up storage space.
- ✓ **Splice/dice reporting** on user adoption, as well as what files have been deleted or are being protected for the long term
- ✓ **The efficiency gains are made for both E3 and E5 level licensing.** In all cases, records are protected in their "retain" phase throughout their lifecycle using out of the box retention labels and then disposed of via the retention labels.

“Set & step back” simplicity

Many NZ organisations already use our iWorkplace automation Apps.

Our new iWorkplace Smart Labels App extends and simplifies M365 out of the box.

It does this by making it simple, at scale, to apply disposal rules. This means that important files are protected from the time they are created. Lower value files and older files are systematically disposed of as permitted by disposal authorities.

The App enables out of the box M365 retention labels to be efficiently setup for existing workspaces, new workspaces, and files as they are created. This approach gives the robustness of out of the box label use plus making it efficient to setup labels at scale. In doing so, it considerably extends what is possible with E3 licences and saves considerable time for those with E5 licences.

Smart Labels elegantly handles specific use cases where the M365 compliance E3/E5 tools are time consuming and impractical:

- **Multiple retention rules apply.** In a document library e.g., “working” and “final” content held in the same library, or major versus minor cases.
- **Event driven R&D.** Cases where files can only be disposed of after an event, e.g., case closes, asset sold or decommissioned, or person leaves the organisation.
- **Transfer.** Cases where files need to be held for transfer to Archives NZ or to be archived

The following page show the simple four steps to set up retention and disposal so that it is just part of business as usual.

How it works in practice: 4 simple steps to compliance

Use your existing iWorkplace Apps plus Smart Labels to lock-in compliance from day one:

ESTABLISHMENT



1) Review the disposal schedule for your organisation's requirements and setup your master set retention labels that sites, folder and files will be tagged with



2) Map the schedule to your taxonomy and content.

BAU: AUTOMATE THE SET UP OF NEW WORKSPACES



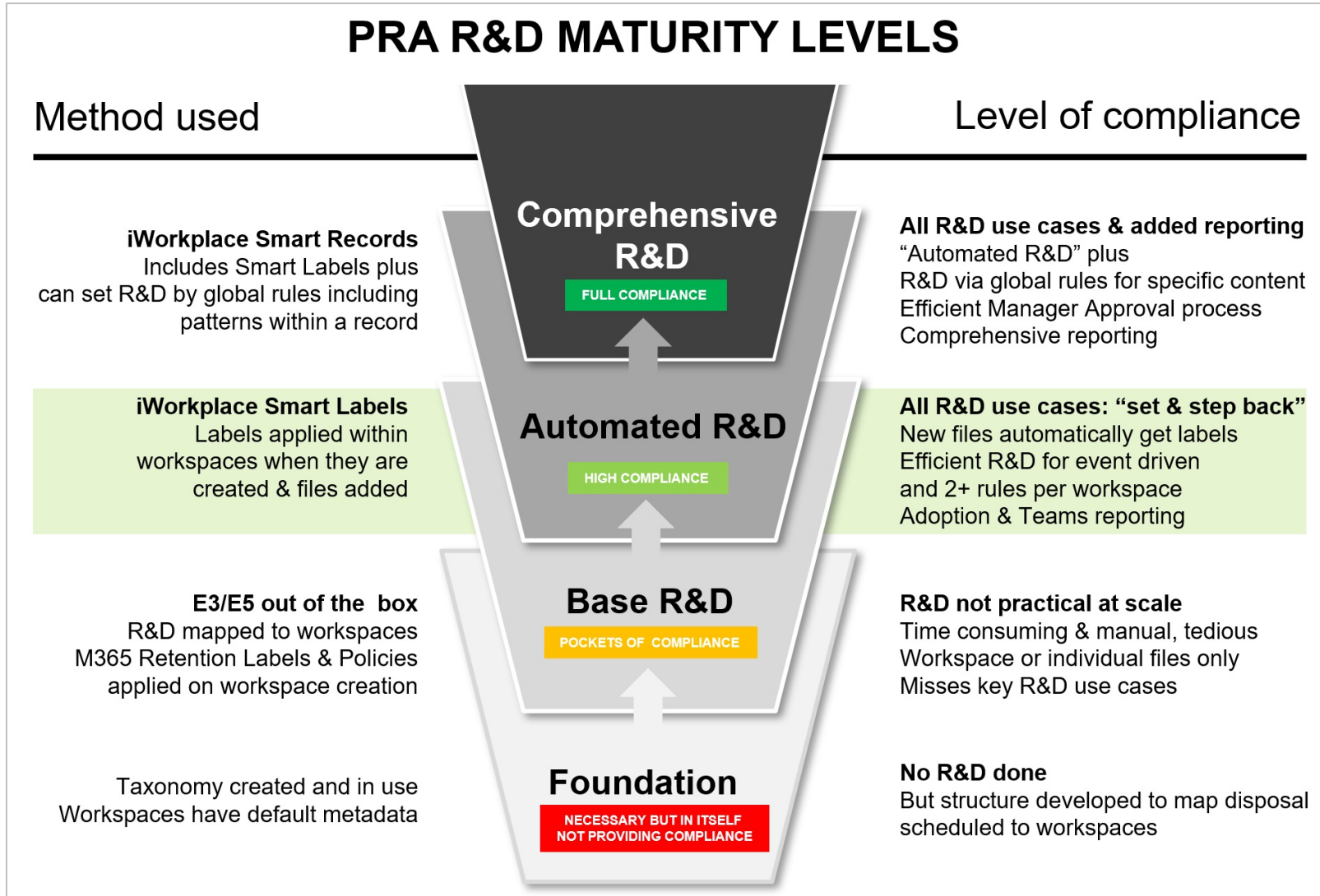
3) Set default metadata that will then set the right label to the content of a whole library or those files in a particular subfolder. This can be done at scale via:

- Column defaults for user requested Teams, so no further admin or action is needed by information managers.
- Templated sites (e.g., project sites).
- iWorkplace Smart Provisioning iWorkplace Smart Metadata for folder level R&D. For instance. folders in a library for "final" versus "working" files can have different retention rules.
- iWorkplace Smart Case Files where different cases have different retention periods, and these only kick in when the case is closed.



4) Step back and have the confidence that files that need to be retained are now protected and those that no longer have value are disposed. Reporting is in place to know what is happening.

The table below compares different methods and what level of PRA grade R&D they achieve:





INFORMATION
LEADERSHIP

informationleadership.com