iWorkplace

Smart Labels

iWorkplace™ Smart Labels supports practical R&D at scale in your organisation by automating the application of out of the box Retention Labels.

Simplify your R&D set-up and achieve compliance at scale.

Files are protected

Leverage out of the box retention labels to protect files until they are due to be disposed regardless of your E3 or E5 license level.

Seperate high value content

Separate your high value content from the noise with different retention periods for different channels, subfolders, or based on an event.

Lock in compliance from day one

Apply retention labels as you build your ECM Teams and workspaces or apply retrospectively.

Free up storage

Work smart, not store more. Dispose of the files you no longer need and retain the ones you do.

4 steps to compliance with Smart Labels

1. Review
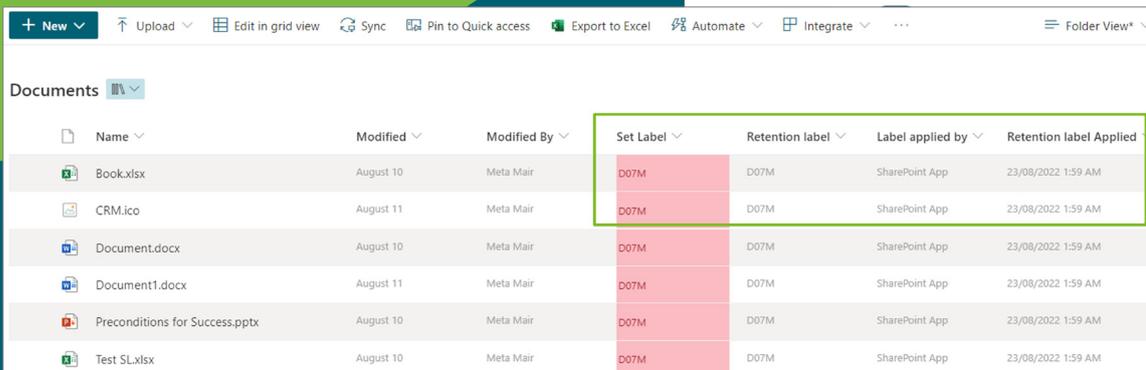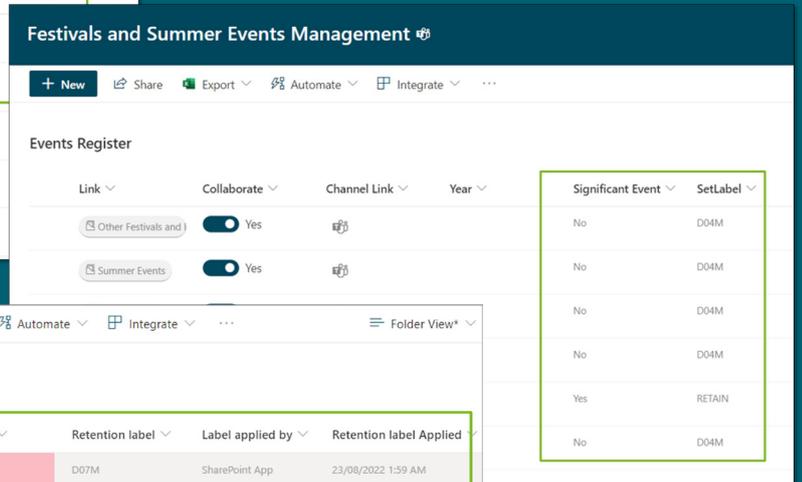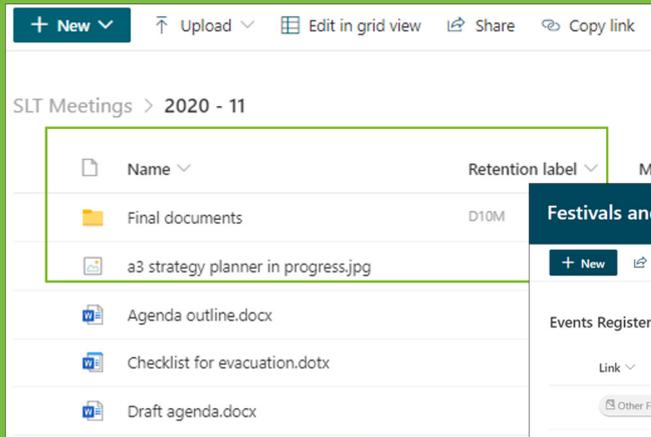The disposal schedule for your organisation's requirements

2. Map
the schedule to your taxonomy and content

3. Set
metadata to apply labels as you build your workspaces or apply retrospectively

4. Step back
sit back as files that need to be protected are retained and the clutter is disposed

2+ rules in a library
Retain final documents

+ New ∨	⬆ Upload ∨	⊞ Edit in grid view	↪ Share	🔗 Copy link

SLT Meetings > 2020 - 11

📄 Name ∨	Retention label ∨	Mo
📁 Final documents	D10M	
🖼 a3 strategy planner in progress.jpg		
📝 Agenda outline.docx		
📝 Checklist for evacuation.dotx		
📝 Draft agenda.docx		

Festivals and Summer Events Management ⊞

+ New	↪ Share	⬇ Export ∨	⚙ Automate ∨	⊞ Integrate ∨	⋯

Events Register

Link ∨	Collaborate ∨	Channel Link ∨	Year ∨	Significant Event ∨	SetLabel ∨
Other Festivals and I	Yes			No	D04M
Summer Events	Yes			No	D04M
				No	D04M
				No	D04M
				Yes	RETAIN
				No	D04M

+ New ∨	⬆ Upload ∨	⊞ Edit in grid view	🔄 Sync	📌 Pin to Quick access	⬇ Export to Excel	⚙ Automate ∨	⊞ Integrate ∨	⋯	≡ Folder View* ∨

Documents 📚 ∨

📄 Name ∨	Modified ∨	Modified By ∨	Set Label ∨	Retention label ∨	Label applied by ∨	Retention label Applied ∨
📊 Book.xlsx	August 10	Meta Mair	D07M	D07M	SharePoint App	23/08/2022 1:59 AM
🖼 CRM.ico	August 11	Meta Mair	D07M	D07M	SharePoint App	23/08/2022 1:59 AM
📝 Document.docx	August 10	Meta Mair	D07M	D07M	SharePoint App	23/08/2022 1:59 AM
📝 Document1.docx	August 11	Meta Mair	D07M	D07M	SharePoint App	23/08/2022 1:59 AM
📊 Preconditions for Success.pptx	August 10	Meta Mair	D07M	D07M	SharePoint App	23/08/2022 1:59 AM
📊 Test SL.xlsx	August 10	Meta Mair	D07M	D07M	SharePoint App	23/08/2022 1:59 AM

Event driven rules
If the event is significant, retain the files

Default rule in a library
Apply labels based on Set Label metadata

Working together with Smart Records

iWorkplace Smart Labels is a subset of iWorkplace Smart Records and can act alone or with Smart Records. Smart Labels automates the use of native M365 retention labels to protect files from day one, allowing for tricky use cases that are complicated or not possible with E3 or E5 licensing.

- Global rules to apply labels
- Global reporting on labels applied and when records are due to be disposed of
- Batch appraisal for records due for transfer or deletion