



# Investor & Analyst Briefing @ SGX

April 9, 2026



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This Presentation includes certain non-GAAP financial measures (including on a forward-looking basis) such as non-GAAP operating income (loss) and non-GAAP operating margin. AvePoint defines non-GAAP operating income (loss) as GAAP operating income (loss) plus stock-based compensation, the amortization of acquired intangible assets and expenses related to the Company's secondary listing on the SGX-ST and decision to discontinue its participation in a growth equity fund. Non-GAAP operating margin is non-GAAP operating income (loss) divided by total revenue. These non-GAAP measures are an addition, and not a substitute for or superior to measures of financial performance prepared in accordance with GAAP and should not be considered as an alternative to net income, operating income or any other performance measures derived in accordance with GAAP. Reconciliations of non-GAAP measures to their most directly comparable GAAP counterparts are included in the Appendix to this Presentation. AvePoint believes that these non-GAAP measures of financial results (including on a forward-looking basis) provide useful supplemental information to investors about AvePoint. AvePoint's management uses forward looking non-GAAP measures to evaluate AvePoint's projected financial and operating performance. However, there are a number of limitations related to the use of these non-GAAP measures and their nearest GAAP equivalents. For example, other companies may calculate non-GAAP measures differently, or may use other measures to calculate their financial performance, and therefore AvePoint's non-GAAP measures may not be directly comparable to similarly titled measures of other companies. In addition to the non-GAAP metric described above, AvePoint management uses the key financial metric annual recurring revenue ("ARR"). ARR is the annualized sum of contractually obligated Annual Contract Value ("ACV") from SaaS, term license and support and maintenance revenues, from all active customers.

Guidance for non-GAAP financial measures excludes, as applicable, share-based compensation expense and the amortization of intangible assets related to acquisitions. A reconciliation of the guidance for non-GAAP financial measures to the corresponding GAAP measures is not available on a forward-looking basis due to the uncertainty regarding, and the potential variability and significance of, the amounts of share-based compensation expense and amortization of intangible assets related to acquisitions that are excluded from the guidance, as well as changes in interest rates and foreign exchange rates, which impact other GAAP performance metrics. Accordingly, a reconciliation of the non-GAAP financial measures guidance to the corresponding GAAP measures for future periods is not available without unreasonable effort.

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Investors and security holders of AvePoint are urged to read AvePoint's recent disclosure statements and other relevant documents that have been or will be filed with the SEC carefully and in their entirety when they become available because they will contain important information about AvePoint. Investors and security holders will be able to obtain free copies of such documents containing important information about AvePoint through the website maintained by the SEC at [www.sec.gov](http://www.sec.gov). Copies of the documents filed with the SEC by AvePoint can be obtained free of charge by directing a written request to AvePoint Investor Relations at 901 East Byrd Street, Suite 900, Richmond, VA 23219 or by emailing [IR@avepoint.com](mailto:IR@avepoint.com).



# Welcome



**Jamie Arestia**

Investor Relations Vice President

[!\[\]\(a03a7eb2f4046e1d3c76772003e549ea\_img.jpg\) @jamesarestia](#)

# Agenda

- 1 Welcome**
- 2 Strategic & Business Update**
- 3 Review of Financial Performance**
- 4 Management Q+A**
- 5 AvePoint Confidence Platform Demo**





# Strategic and Business Update



**Dr. Tianyi "TJ" Jiang**  
Chief Executive Officer

[in](#) @tianyijiang

# Full Year 2025 At-a-Glance

**\$417mm**

Annual Recurring Revenue

**38%**

SaaS Revenue Growth

**20% / 19%**

Op. Cash Flow / Free Cash Flow Margin

**\$419mm**

Total Revenue

**28,500+**

Total Customers

**826**

Customers >\$100K+ ARR

**8% / 19%**

GAAP / Non-GAAP Operating Margin

**46%**

Rule of 40

*Annual recurring revenue and customer metrics as of December 31, 2025. All other metrics are for the FY 2025 period. Rule of 40 is the sum of ARR growth and non-GAAP operating margin.*

# Our Mission



*Transforming Data to be AI-Ready*

***Our Mission***  
To Enable Organizations to  
**Collaborate with  
Confidence** by Ensuring a  
**Robust Data Foundation**



# We Do the Hard Things First



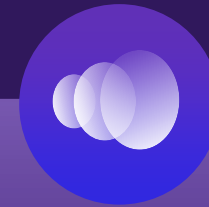
Building  
Enterprise-  
Grade Software



Direct Selling into  
Highly Regulated  
Industries



Fought to  
Enter New  
Regions



Subscription  
Model  
Transition



Went Public  
with only \$60mm  
Primary Capital  
and No Debt

**Putting the pieces in place to support durable, profitable growth at scale**

# Today's Data Management Challenges are Pervasive...

## Legacy & Fragmented Data

### DATA PROBLEMS

Data Silos, Inconsistent Formats, Outdated Information

## Overexposed Data

### DATA PROBLEMS

Who Has Access?, Outdated Policies, Misconfigured Controls

## Data Loss & Interruption

### DATA PROBLEMS

Extended Downtime, Data Loss, Reputational Damage

## Digital Sprawl

### DATA PROBLEMS

Disorganized Data, App, Agent, Workspace Sprawl  
ROT Data



# ...and Increasingly Interconnected

## Legacy & Fragmented Data

- Data silos lead to inconsistent data protection
- Restoring fragmented data is complicated and time-consuming

## Overexposed Data

- Fragmented data is harder to find, understand, and secure
- Distributed systems make it harder to provide comprehensive security

## Data Loss & Interruption

- Data sprawl overextends infrastructure for backup and recovery operations
- Prioritizing which data to restore in an outage wastes time

## Digital Sprawl

- Data sprawl drives more complex reporting and remediation
- Managing ROT distracts from important data, creating security gaps



# The AvePoint Confidence Platform



## Resilience Suite

### DATA SECURITY & PROTECTION

comply with regulations, preserve critical records, and ensure business continuity

## Modernization Suite

### EMPLOYEE PRODUCTIVITY

transform legacy data and processes for modern SaaS platforms

## Control Suite

### DATA GOVERNANCE

a ready-made framework for automated governance and policy enforcement to reduce security risk

## Addressing Multiple Strategic Use Cases

### AI Confidence

Improve data quality, address oversharing, manage costs, and drive adoption.

### Data Security Posture Mgmt

Review security posture, take immediate action to remediate, and enforce policies automatically.

### Cost Management

Optimize operational workflows, storage, licenses, overheads, and more.

### Cloud Resilience

Protect and rapidly recover from ransomware and data loss across multi-cloud SaaS, IaaS, and PaaS.

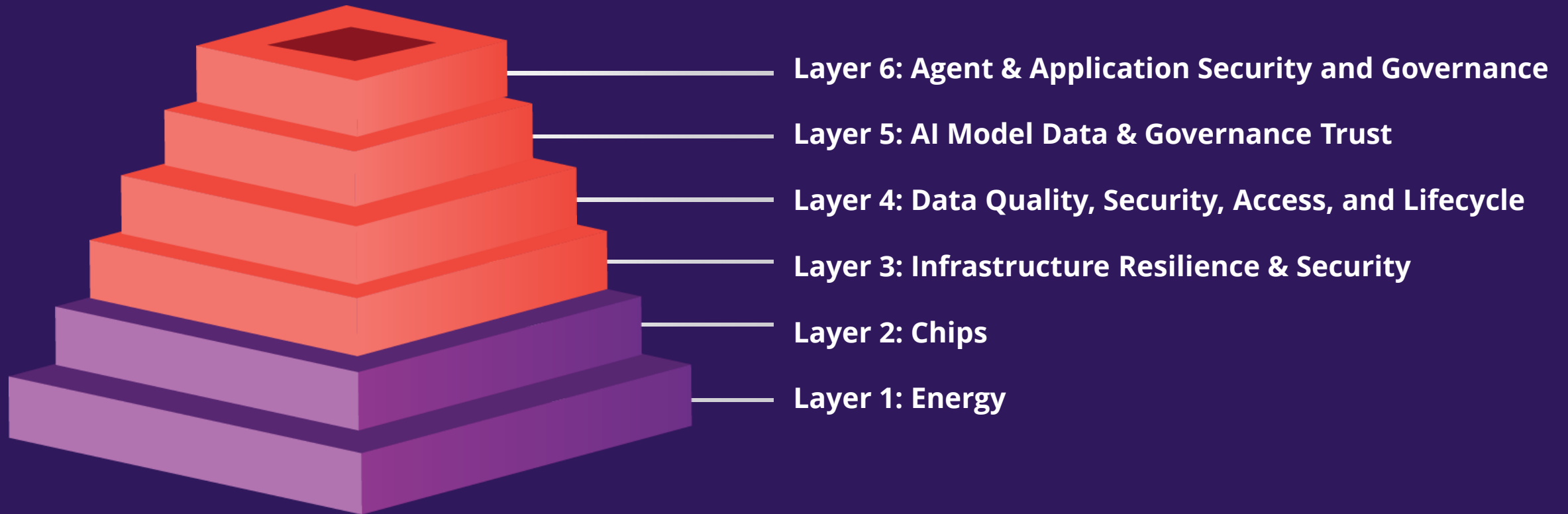
### Agent Control

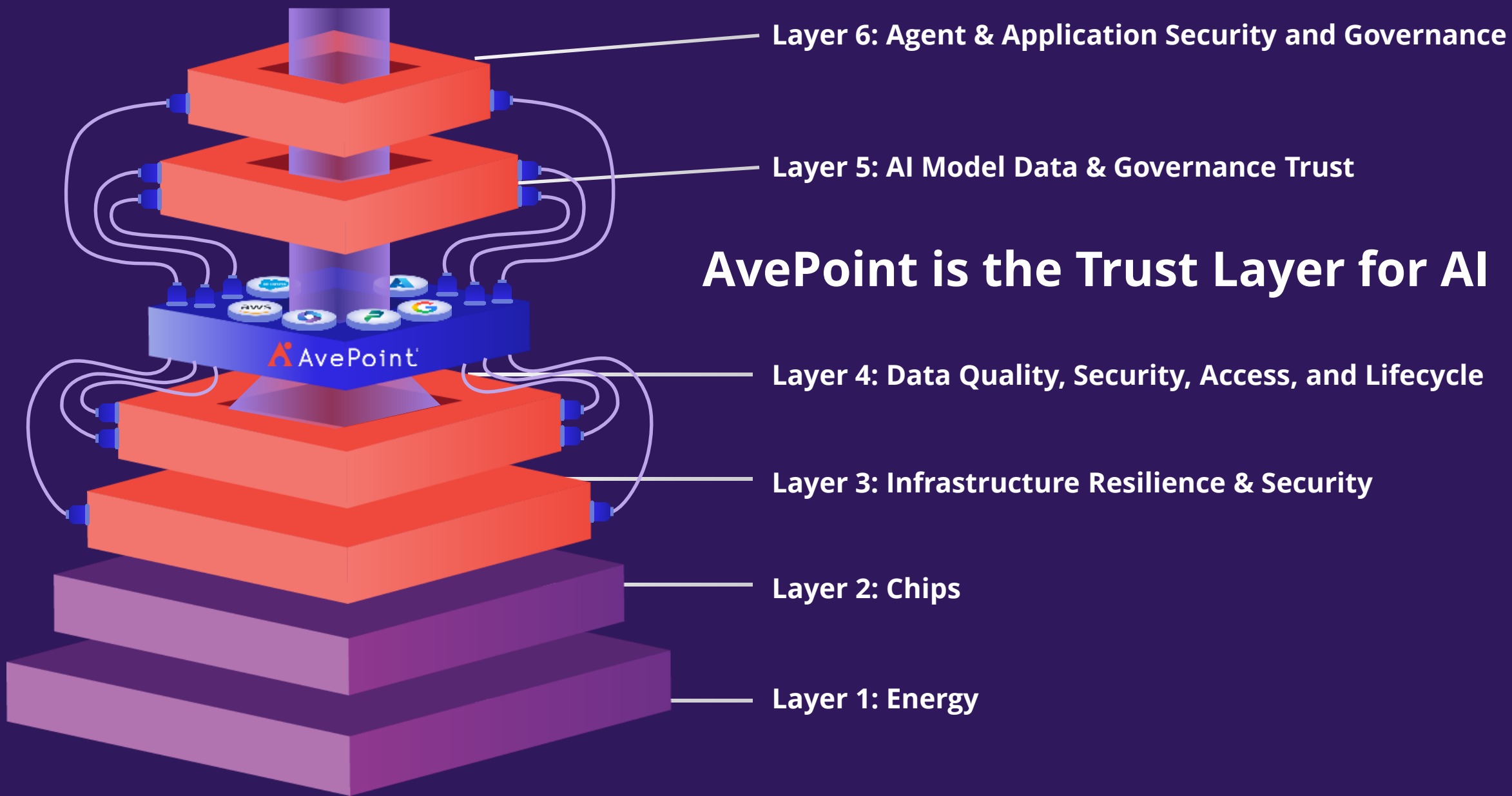
Discovery, inventory, control and protect AI agents.

### Compliance & IM

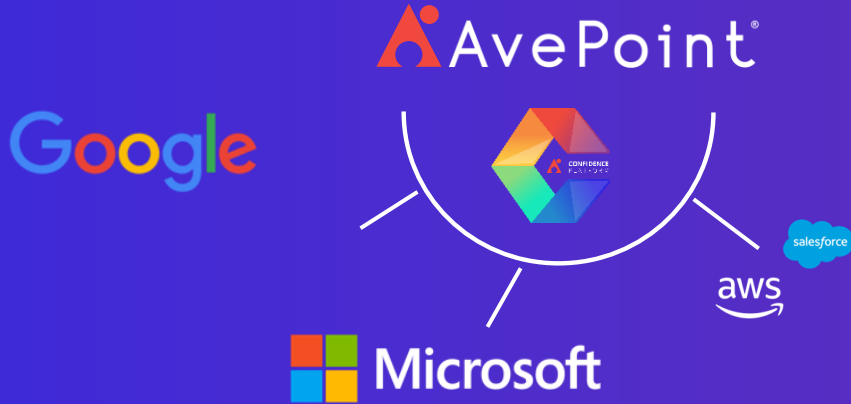
Classify, retain, archive and dispose of data to ensure regulatory compliance

# Trust is the New Currency





# Multi-Ecosystem Opportunity

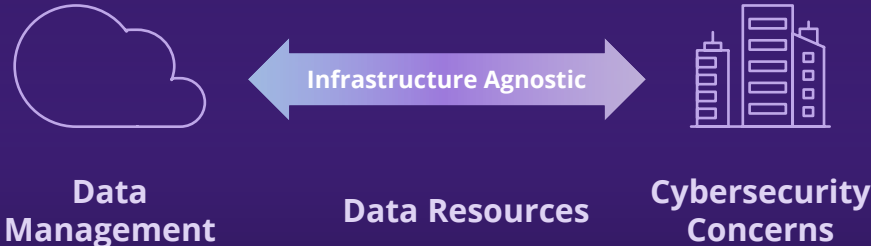


## Mission Critical for “Data-first” Enterprises

*Complex Data Ecosystem of Major Technology Providers*

## Empower Data Management with Security

*AvePoint Seamless End-User Experience*



# Our Competitive Differentiation

1

## Deep Ecosystem Partnerships

AvePoint has built a *growing and diversified partner ecosystem* that includes hyperscalers, MSPs, and global system integrators. This ecosystem extends AvePoint's reach across commercial enterprises, highly regulated industries, and public sector organizations worldwide.

2

## Proprietary Platform Architecture

No company offers the same breadth of functionalities that we provide in a single integrated platform. Our ability to *address multiple strategic use cases*, coupled with the platform's ease of use, scalability, rigor of security protocols, integration with third-party apps and data sources, time to value and total cost of ownership, provides a meaningful competitive advantage.

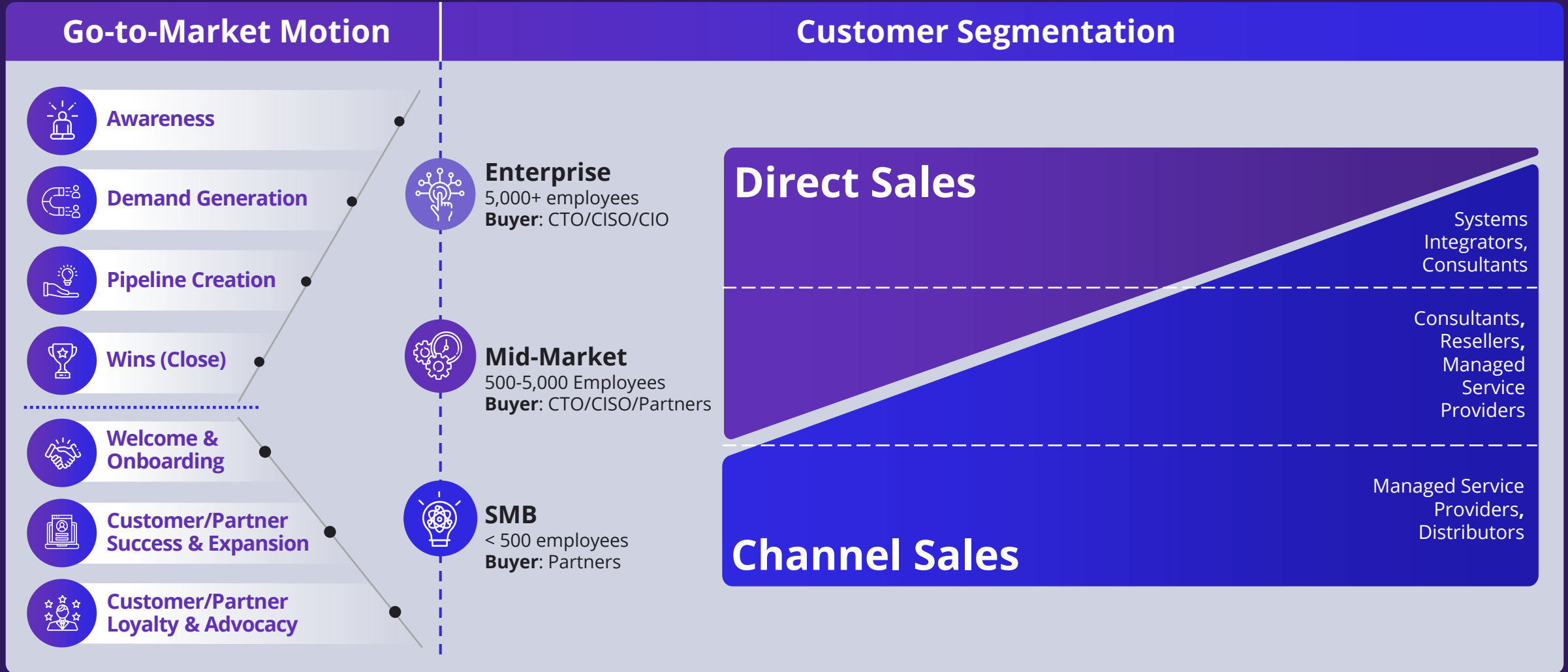
3

## Global Trust and Scale

Operating across 15 global data centers with FedRAMP, ISO, ISMAP and SOC certifications, we *meet the most stringent security and compliance needs* of governments and highly regulated industries.

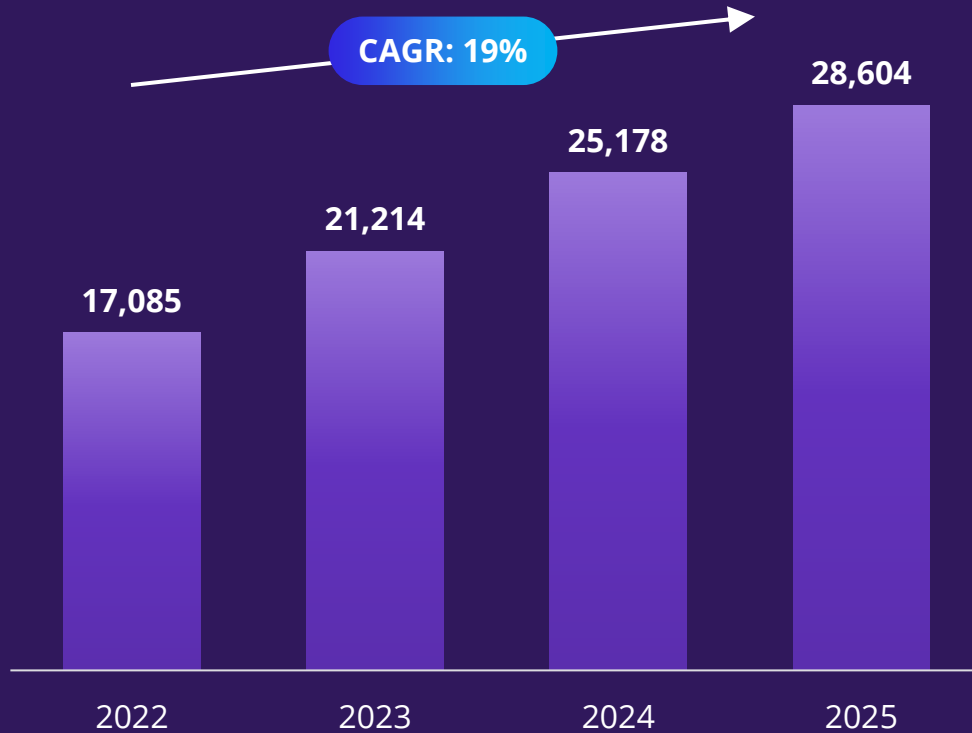


# Go-to-Market Motion

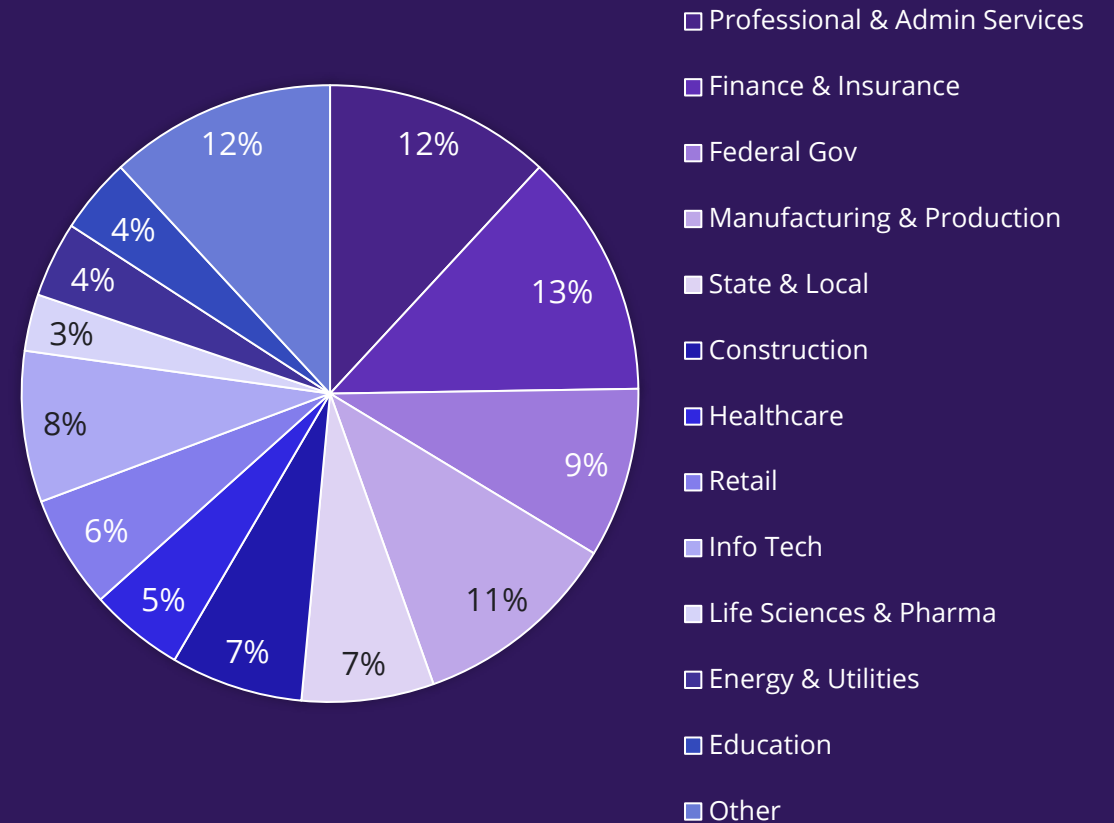


# Strong Customer Growth Across Industries

## TOTAL CUSTOMERS



## INDUSTRIES



ARR contributions by industry as of December 31, 2025.

# Balanced Contribution Across Regions



**North America**

42% of Total ARR

22% ARR CAGR

**EMEA**

36% of Total ARR

26% ARR CAGR

**APAC**

22% of Total ARR

29% ARR CAGR

ARR contributions as of December 31, 2025. CAGR is for the 2022-2025 period.



# The Future of Data Management

1

## AI at Scale

AvePoint ensures that data estates are AI-ready by design, *embedding governance, protection, and compliance* directly into the most commonly leveraged modern collaboration and content platforms.

2

## Security by Culture

By aligning policy with day-to-day collaboration, AvePoint *reduces friction* while *improving compliance outcomes* across the digital workplace.

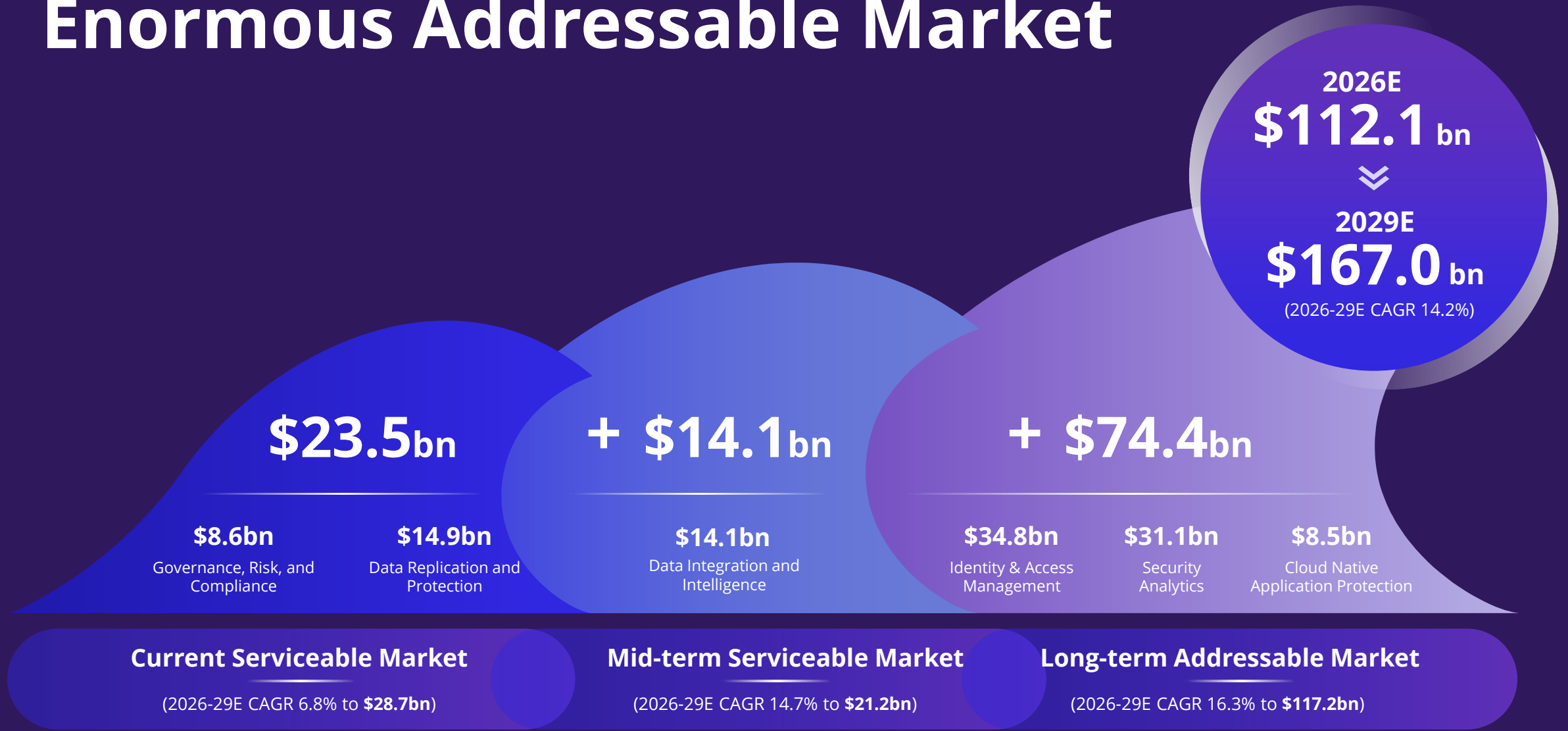
3

## Platform Power

AvePoint *unifies data security, governance and resilience with a single platform*, lowering total cost of ownership, simplifying operations, and accelerating deployment and adoption.



# Enormous Addressable Market



Source: IDC, Semiannual Software Tracker, November 2025



# Connected Challenges One Platform



Legacy & Fragmented Data  
Overexposed Data  
Data Loss & Interruption  
Digital Sprawl

## COMPLETE DATA PROTECTION

SECURITY + GOVERNANCE + RESILIENCE

### PLATFORM CAPABILITIES



## AVEPOINT CONFIDENCE PLATFORM

Robust shared capabilities for solving inter-related data protection challenges, across Clouds



# Strategic Priorities



Accelerate  
Customer  
Adoption and  
Retention



Expand  
Platform  
Offerings



Continued  
Scaling of  
Channel  
Ecosystem



Broaden  
Global  
Presence



Strategic  
Acquisitions  
and  
Investments

# Key Takeaways

- 1** We are a true platform company, delivering profitable growth at increasing scale
- 2** Customers rely on AvePoint to address a number of strategic use cases
- 3** We sell to companies of all sizes, across all verticals, in all regions of the world
- 4** We operate in an addressable market that is durable, large and growing
- 5** AI adoption makes the need for AvePoint even more critical





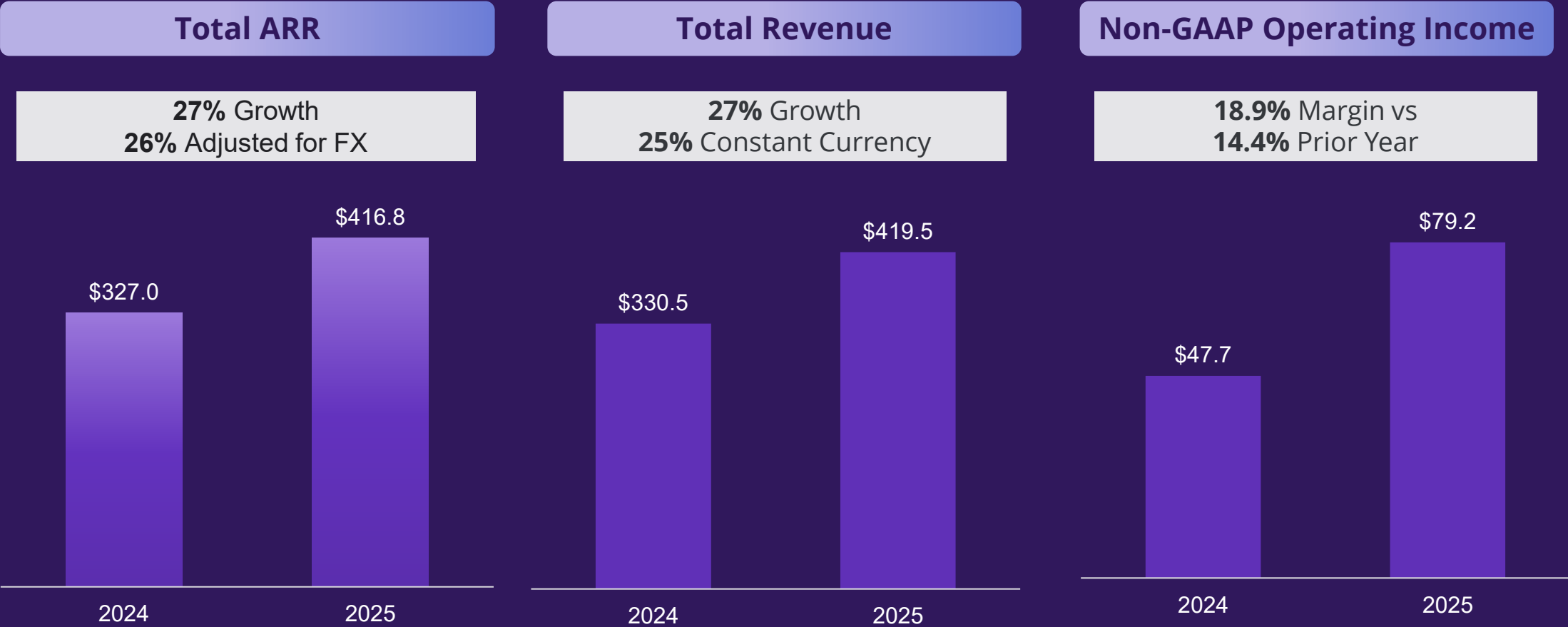
# Financial Highlights



**Jim Caci**  
Chief Financial Officer

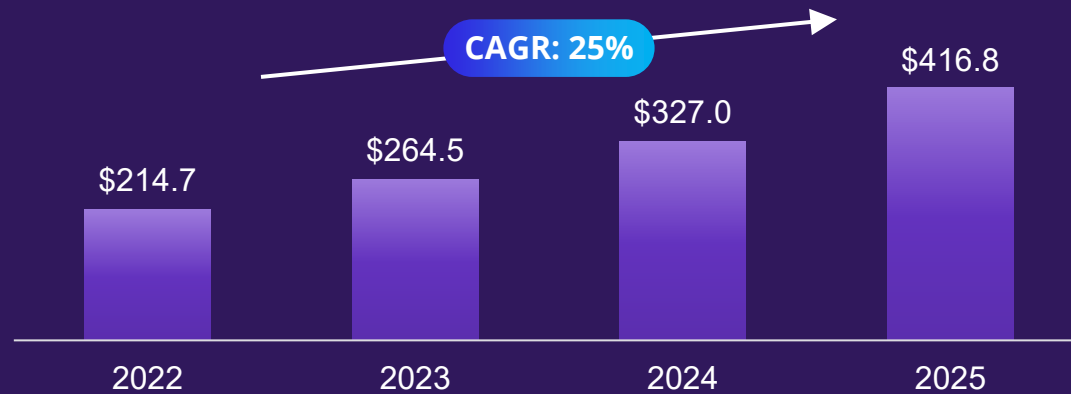
[in](#) @jimcaci

# FY 2025 – Key Performance Metrics

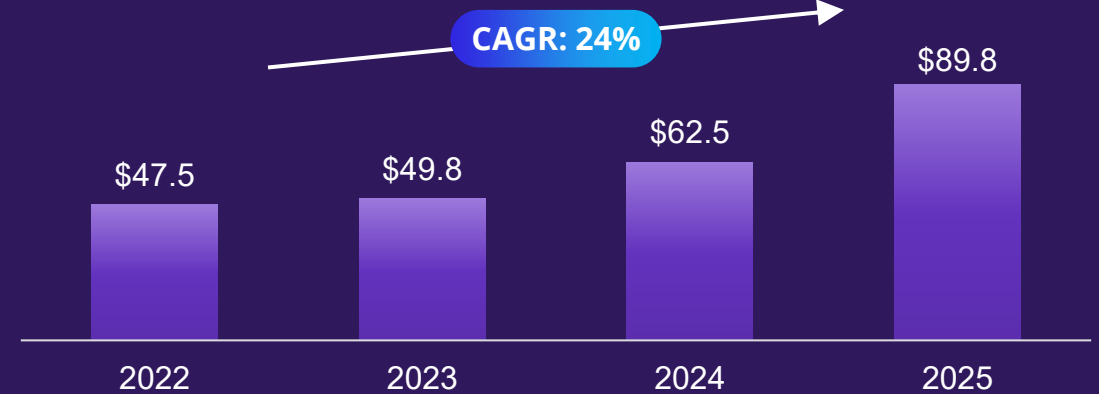


# Robust Growth at Scale

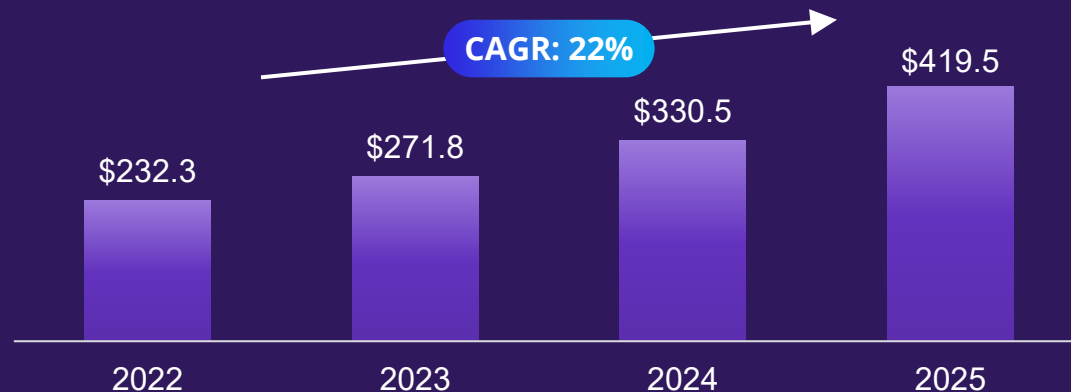
## Total ARR



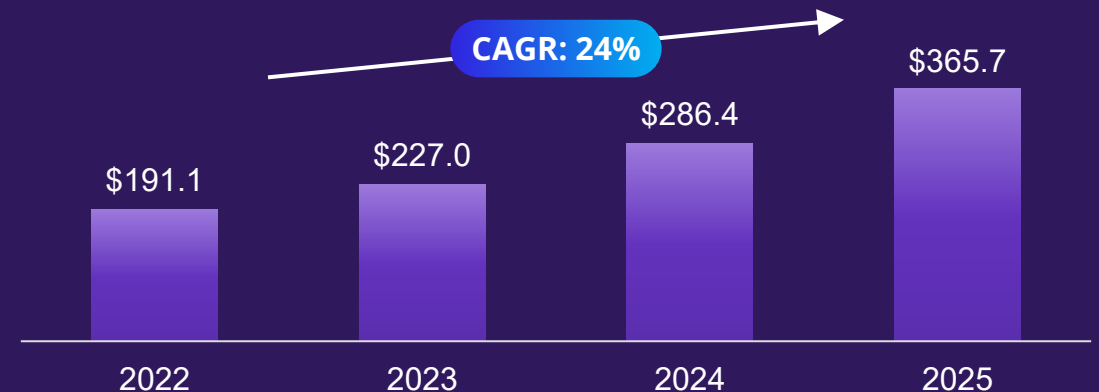
## Net New ARR



## Total Revenue



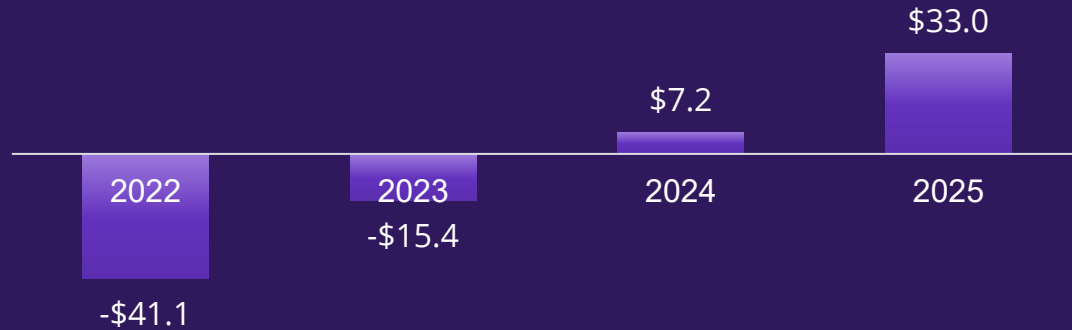
## Recurring Revenue



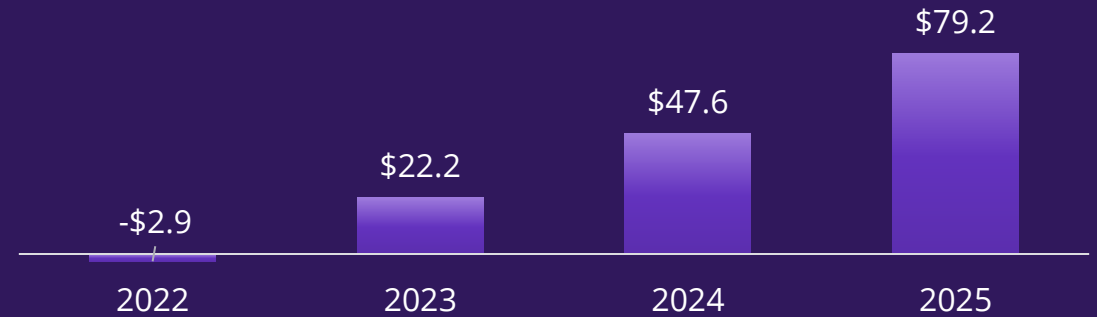
Recurring revenue includes SaaS, term license and support, and maintenance revenues.

# Strong Profitability & Free Cash Flow Generation

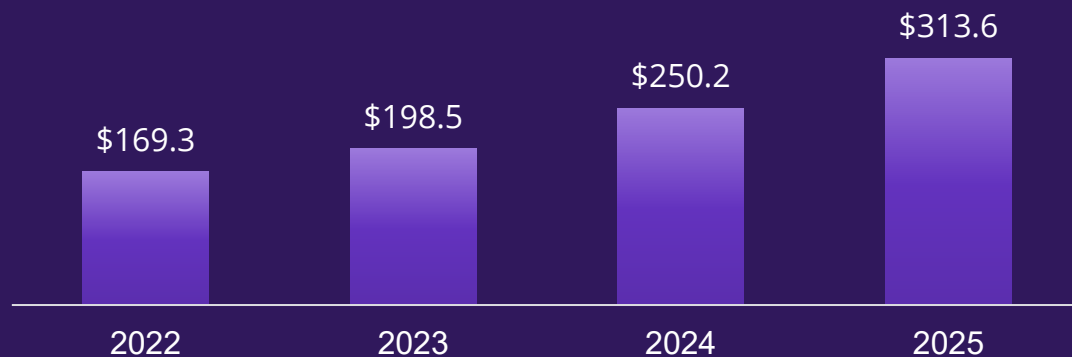
## GAAP Operating Income



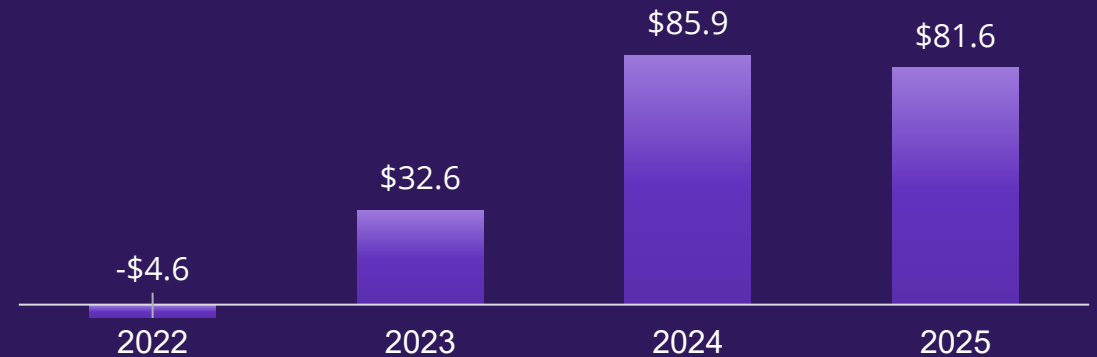
## Non-GAAP Operating Income



## Non-GAAP Gross Profit



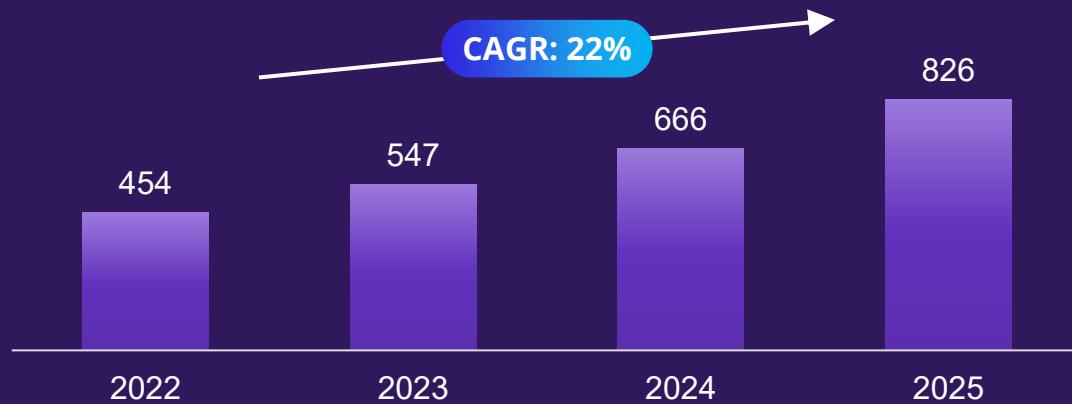
## Free Cash Flow



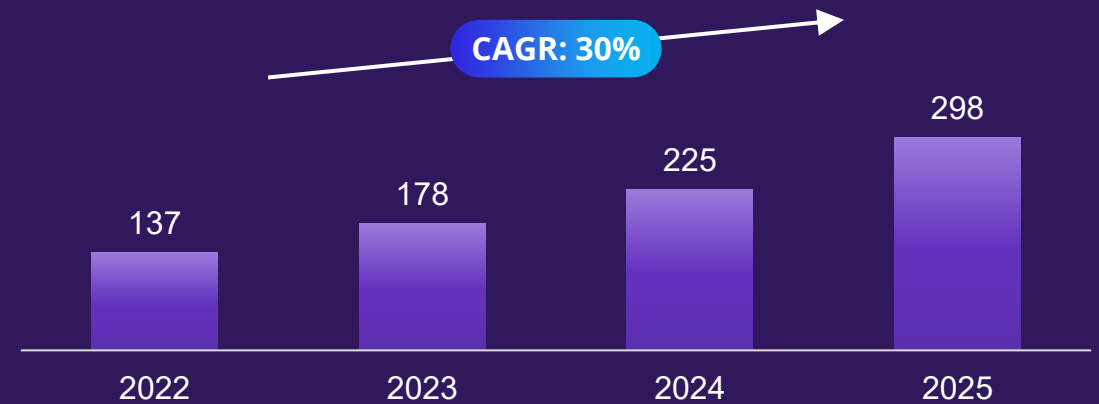
Free cash flow is the sum of operating cash flow and the purchase of property and equipment.

# Continued Success with Large Enterprises

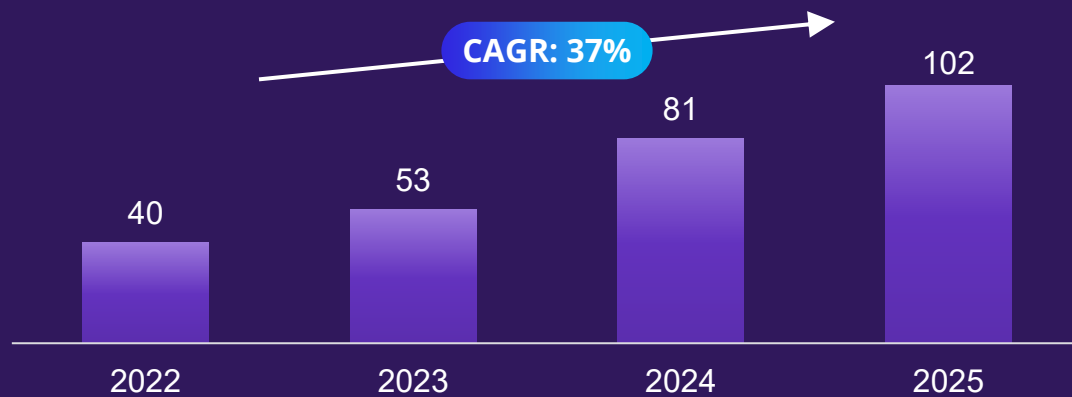
## \$100K ARR Customers



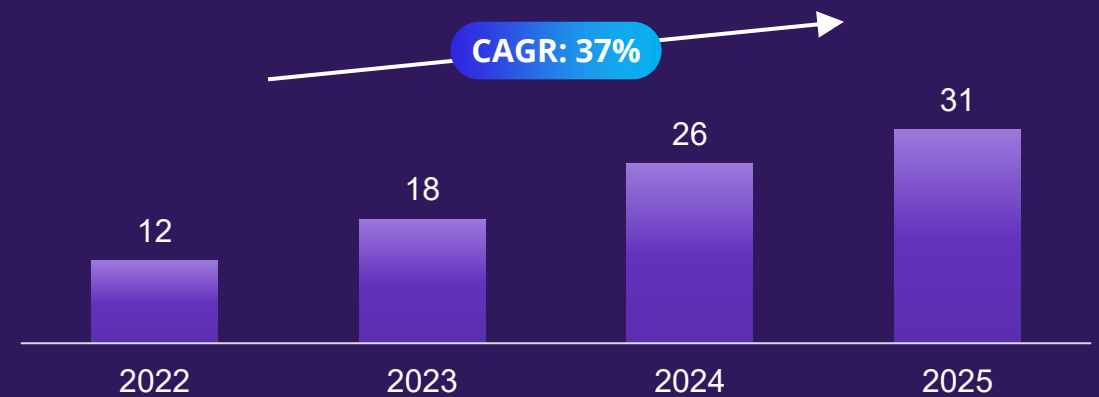
## \$250K ARR Customers



## \$500K ARR Customers

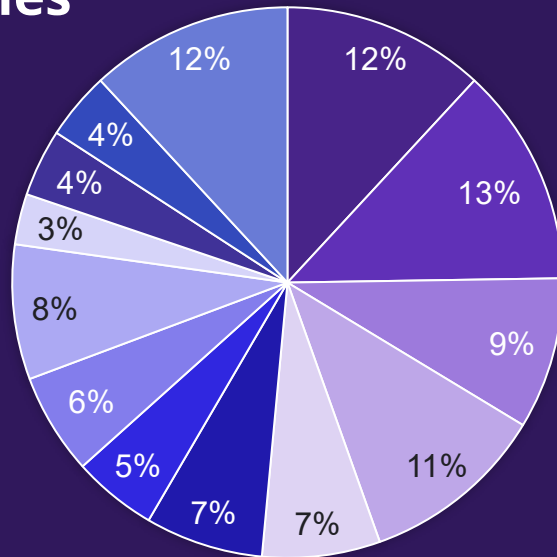


## \$1M ARR Customers



# Diversified ARR Base

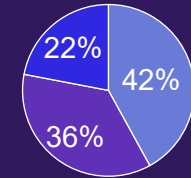
## Industries



- Professional & Admin Services
- Finance & Insurance
- Federal Gov
- Manufacturing & Production
- State & Local
- Construction
- Healthcare
- Retail
- Info Tech
- Life Sciences & Pharma
- Energy & Utilities
- Education
- Other

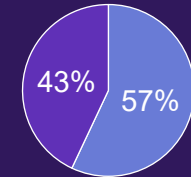
## Geography

◦ North America 42% | ◦ EMEA 36% | ◦ APAC 22%



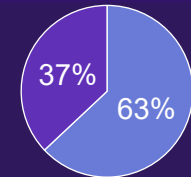
## Direct vs Channel

◦ Channel 57% | ◦ Direct 43%



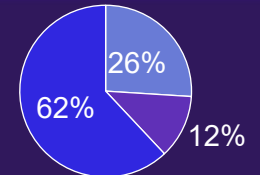
## New vs Existing

◦ Existing 63% | ◦ New 37%



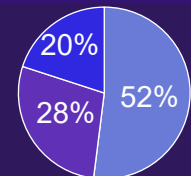
## Product Suites

◦ Control 26% | ◦ Modernization 12% | ◦ Resilience 62%



## Customer Segment

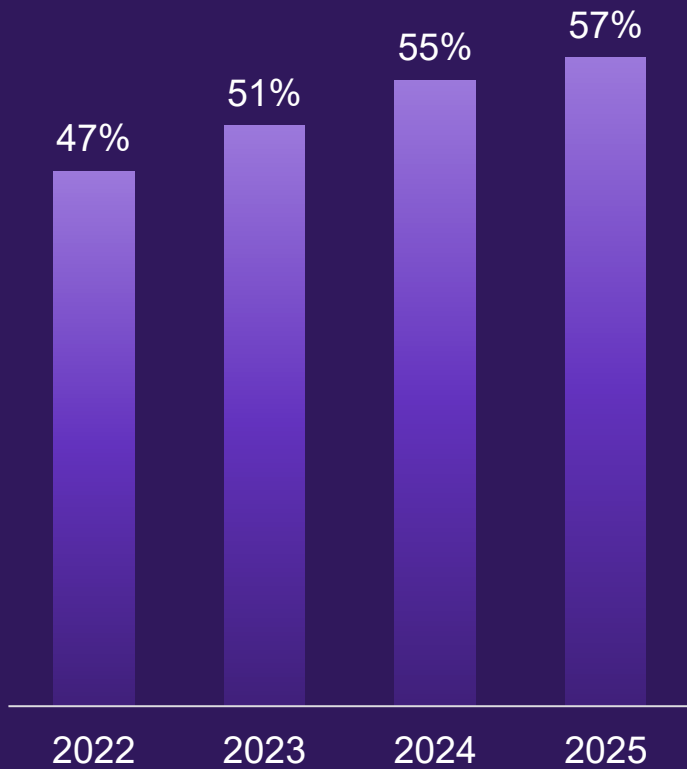
◦ Enterprise 52% | ◦ Mid-Market 28% | ◦ SMB 20%



ARR contributions as of December 31, 2025. New/existing percentages are applicable to incremental ARR.

# Our Ongoing Channel Transformation

Channel ARR as % of Total ARR



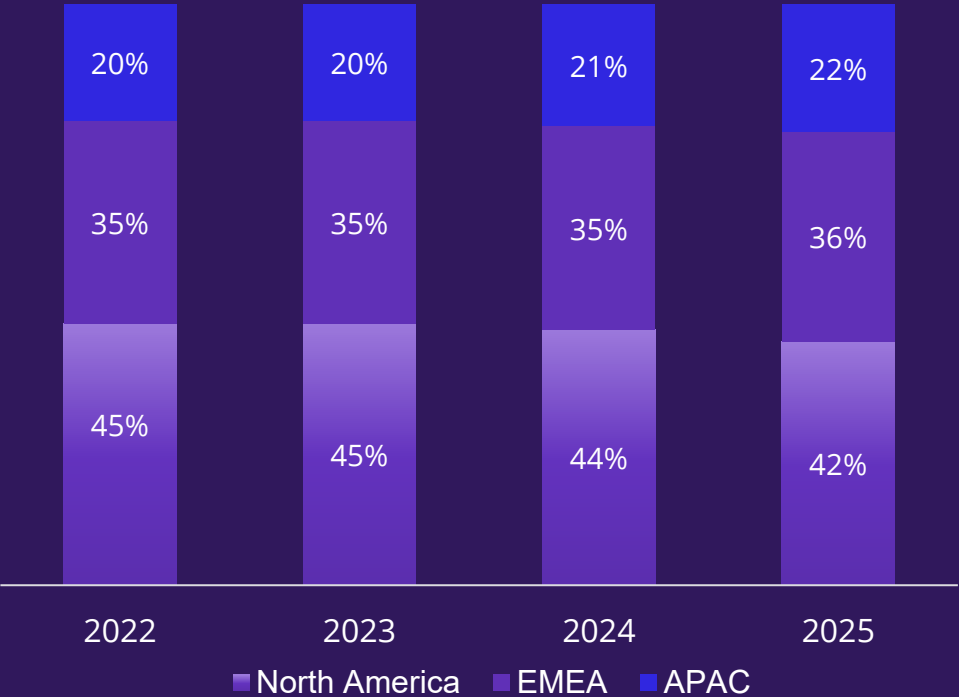
ARR from MSPs (\$m)



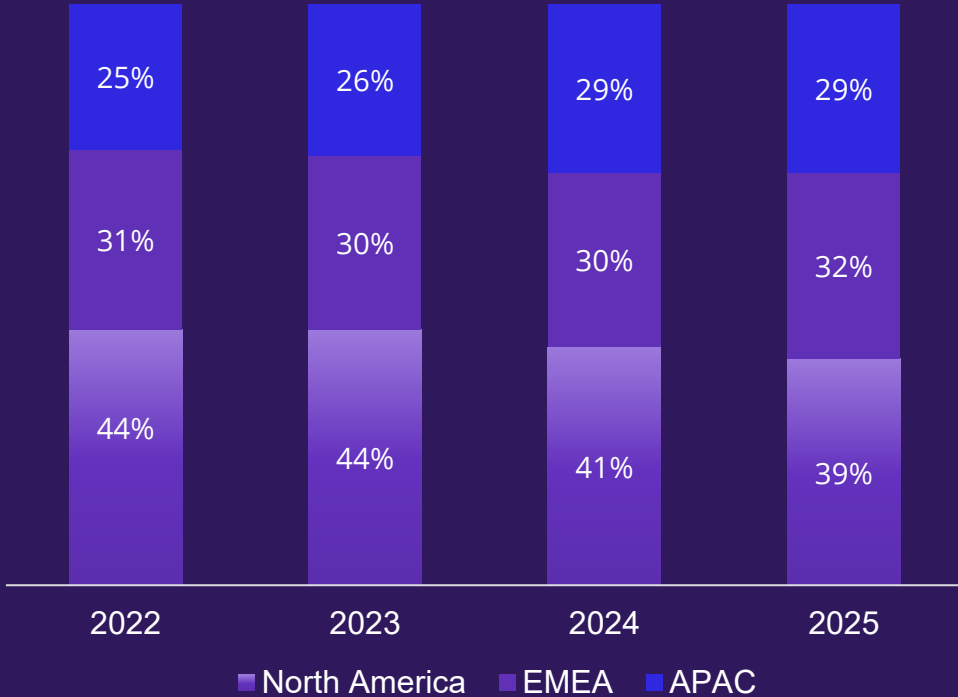
Channel partners include managed service providers, value-added resellers, systems integrators and others.

# Balanced Topline Contributions by Region

ARR Contribution

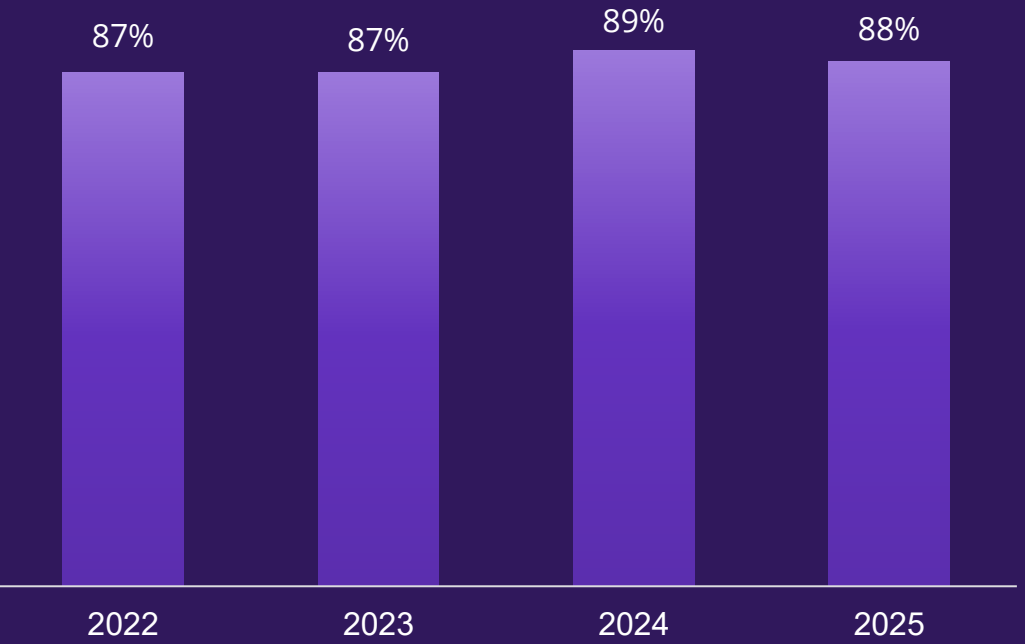


Revenue Contribution



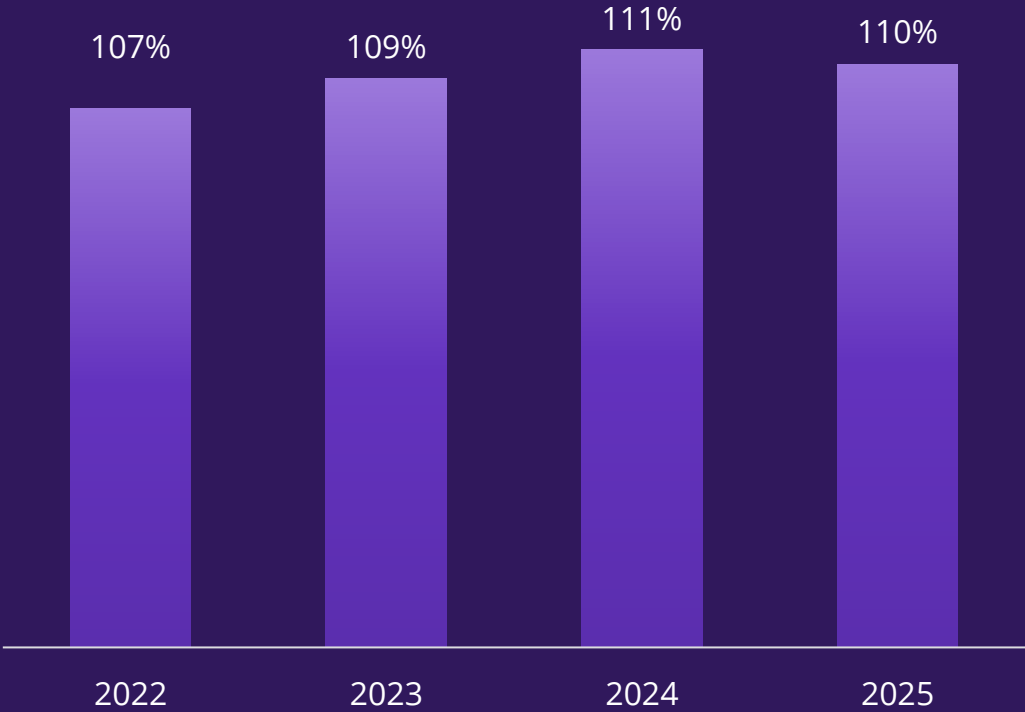
# Attractive Customer Retention Rates

## Gross Retention Rate



**GRR Target: 90%+**

## Net Retention Rate



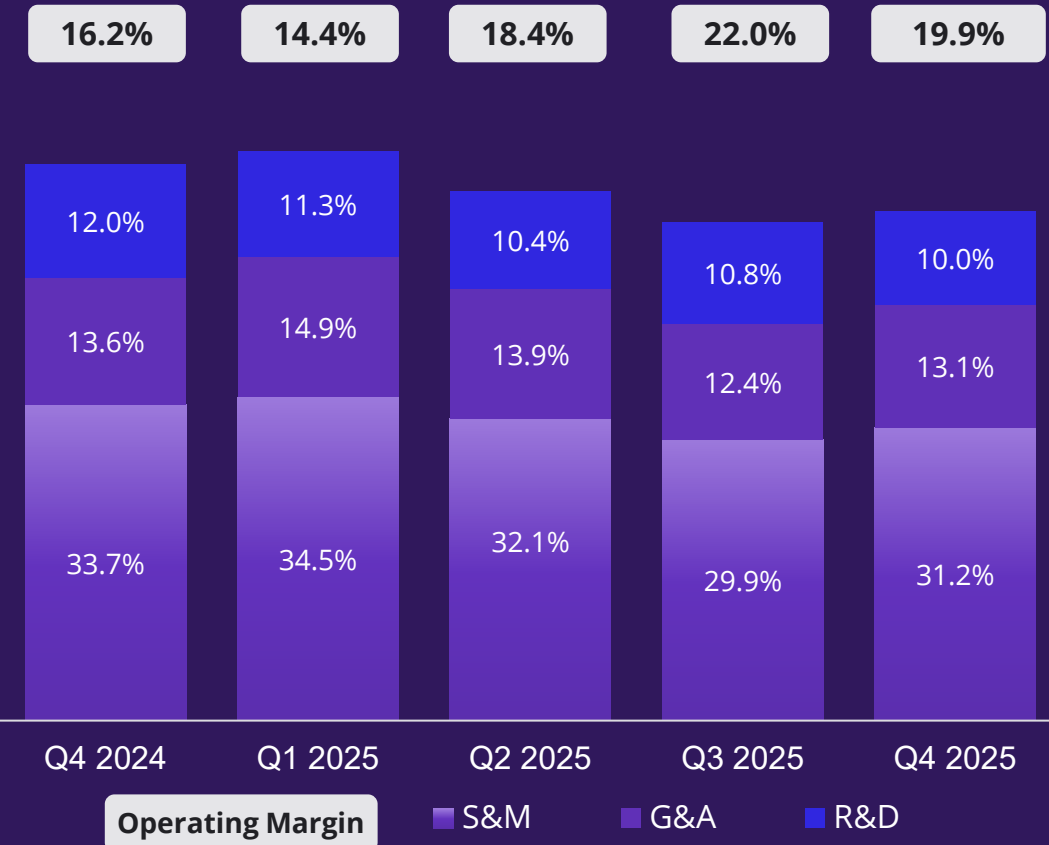
**NRR Target: 115%**

Retention rates are for all customers and are adjusted for FX.

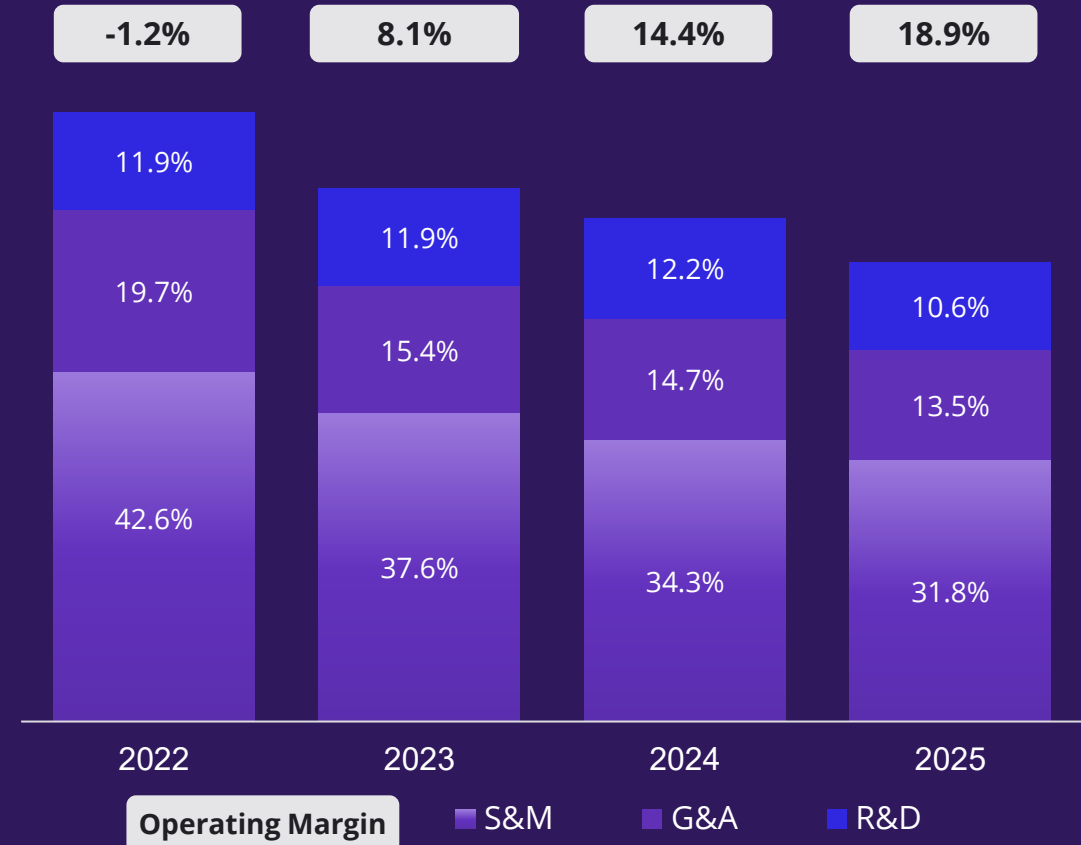


# Driving Operating Leverage While Investing For Growth

## Quarterly Non-GAAP Operating Expenses



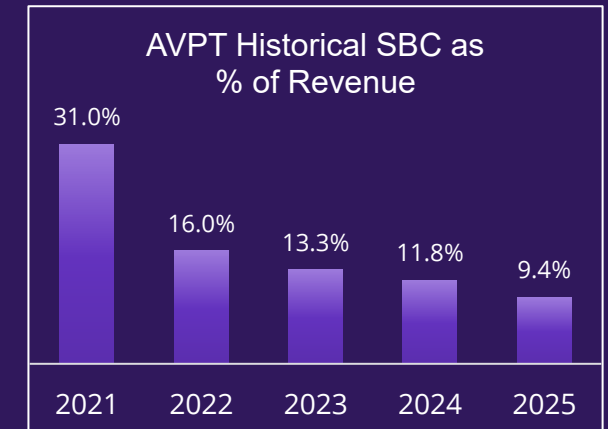
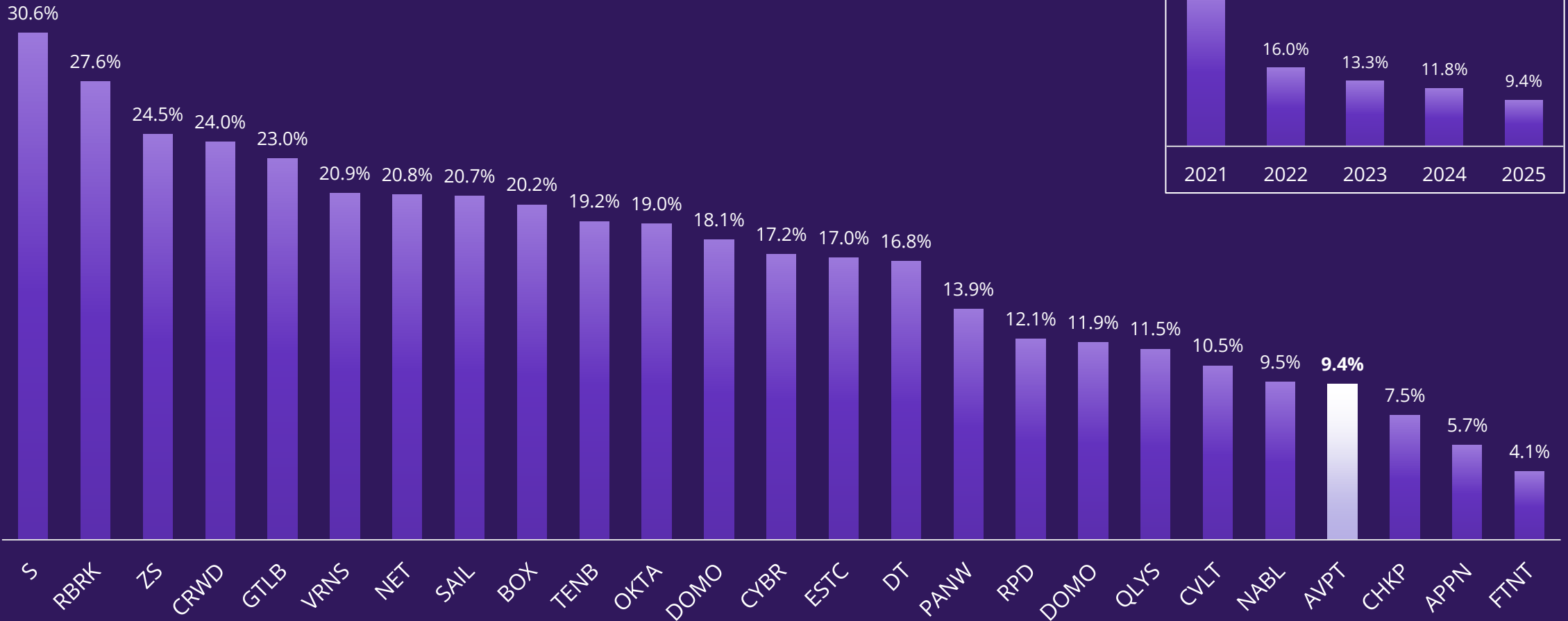
## Annual Non-GAAP Operating Expenses



Non-GAAP expenses shown as a percentage of revenue.

# Effective Management of Stock-Based Compensation

Stock-Based Compensation as % of Revenue (TTM)

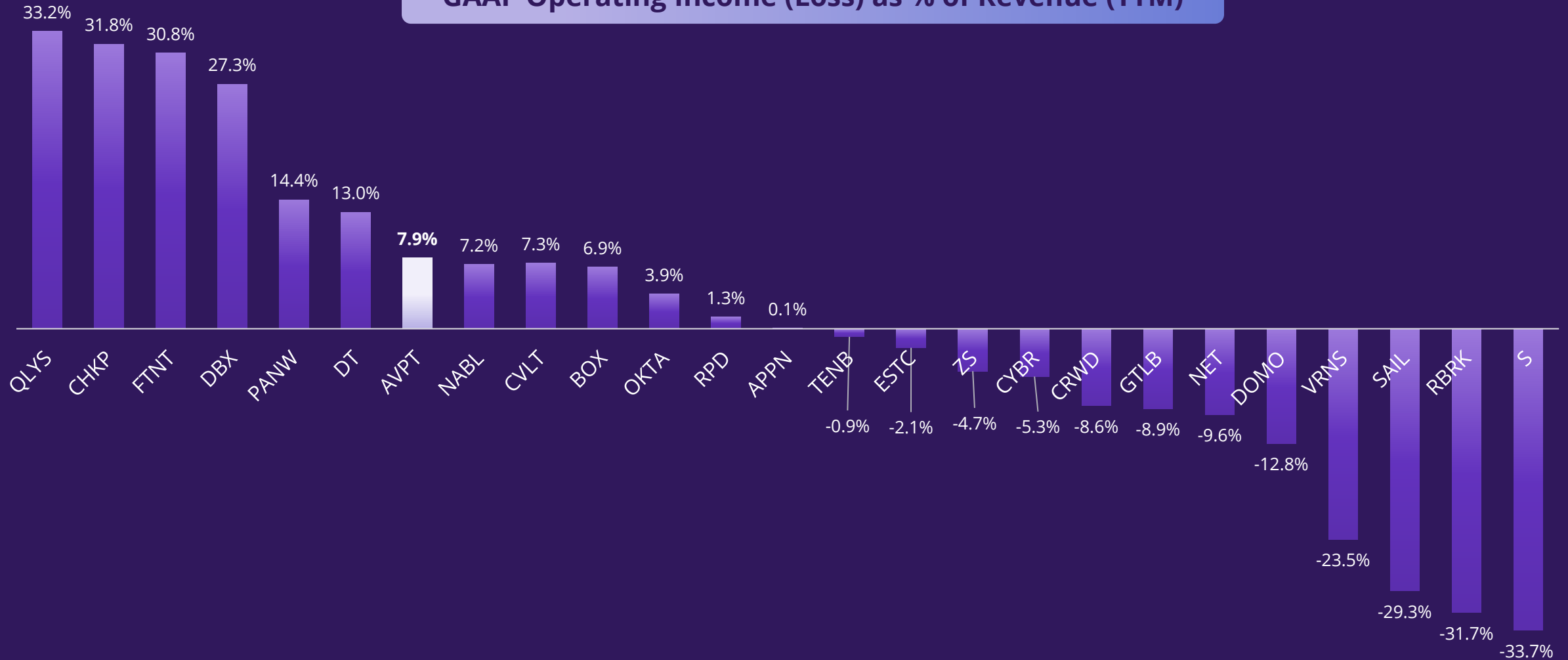


Revenues and stock-based compensation presented on a trailing twelve-month basis using the latest reported quarter for all companies.



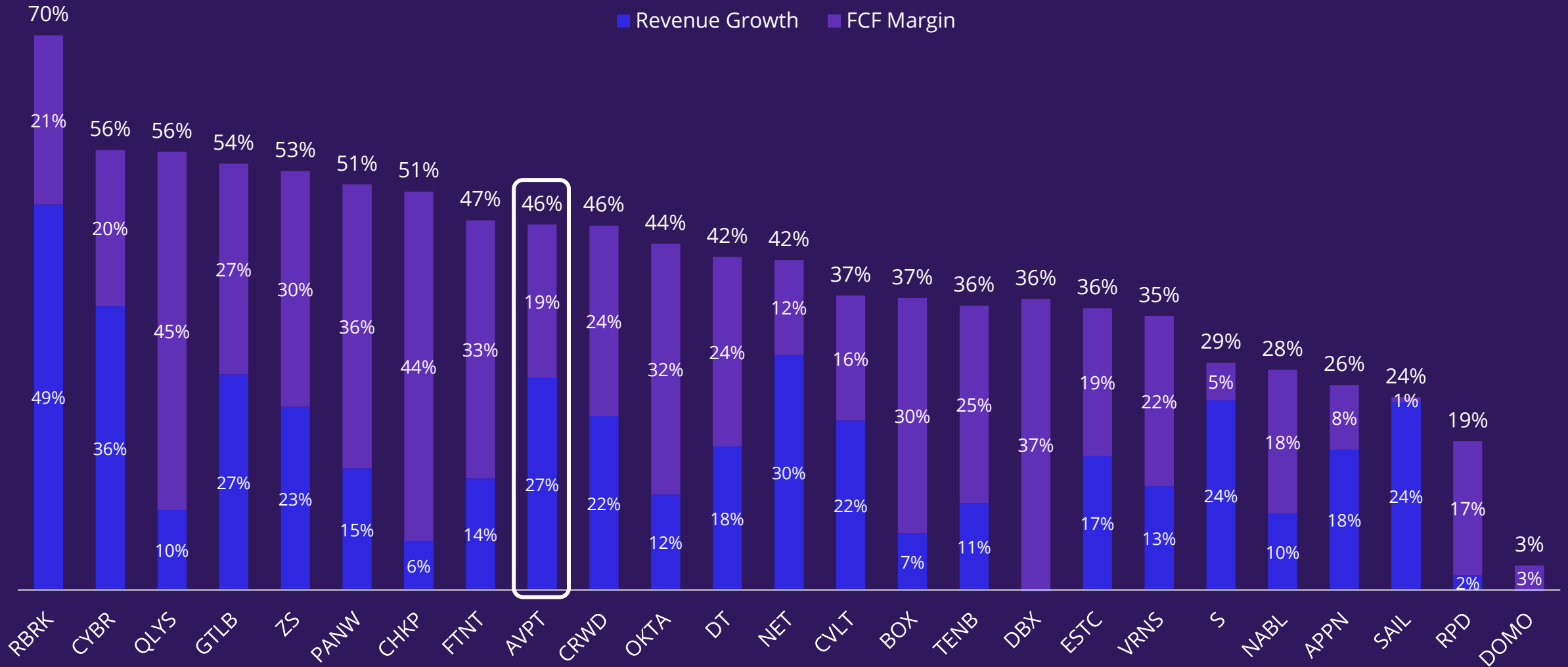
# Delivering GAAP Operating Profitability

GAAP Operating Income (Loss) as % of Revenue (TTM)



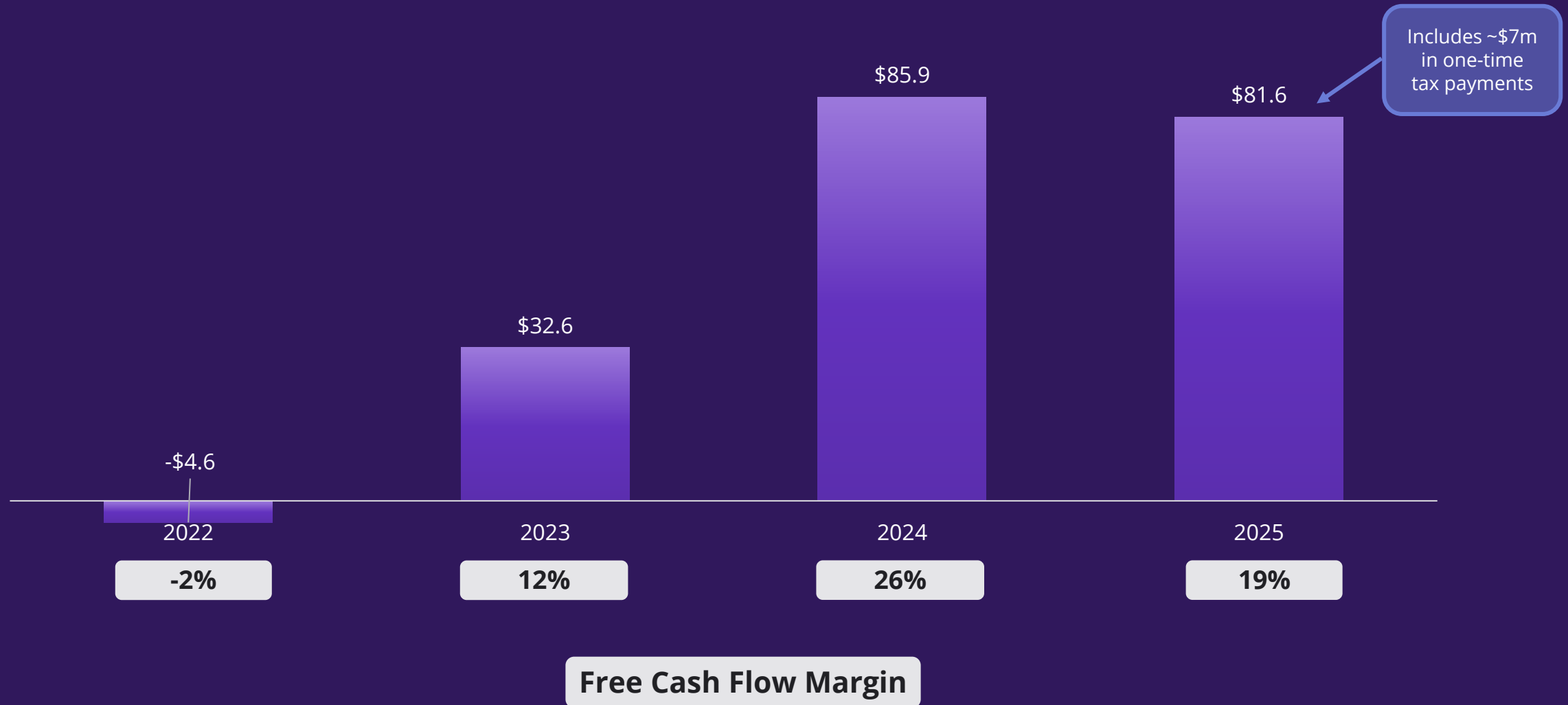
Revenues and GAAP operating income (loss) presented on a trailing twelve-month basis using the latest reported quarter for all companies.

# Balanced Execution Above the Rule of 40



Revenue growth and free cash flow margin presented on a trailing twelve-month basis using the latest reported quarter for all companies.

# Demonstrating Meaningful FCF Generation



Free cash flow is the sum of cash flow from operations and the purchase of property and equipment.

# Capital Allocation Priorities



## Invest in Profitable Growth

Accelerate customer adoption, scale channel ecosystem, broaden market presence, and invest in R&D



## Strategic Investments and Acquisitions

Invest in companies and technologies complementary to our business, and consistent with our strategy



## Share Repurchases

Remain active and opportunistic in the open market

# Track Record of Successful M&A



# Full-Year 2026 Financial Guidance

FY 2026		
(\$ in mm)	Low	High
<b>Annual Recurring Revenue</b>	<b>\$525.1</b>	<b>\$531.1</b>
<i>y/y growth (reported)</i>	26%	27%
<i>y/y growth (adjusted for FX)</i>	25%	26%
<b>Total Revenue</b>	<b>\$509.4</b>	<b>\$517.4</b>
<i>y/y growth (reported)</i>	21%	23%
<i>y/y growth (constant currency)</i>	19%	21%
<b>Non-GAAP Operating Income</b>	<b>\$92.6</b>	<b>\$96.6</b>
<i>Margin (reported)</i>	18.2%	18.7%



# Long-Term Non-GAAP Targets

	2022	2023	2024	2025	2029 Target
<b>Gross Margin</b>	72.9%	73.0%	75.7%	74.8%	80.0%
<b>S&amp;M as % of Revenue</b>	43%	38%	34%	32%	30%
<b>R&amp;D as % of Revenue</b>	12%	12%	12%	11%	12.5%
<b>G&amp;A as % of Revenue</b>	20%	15%	15%	14%	10%
<b>Operating Margin</b>	(1.2%)	8.1%	14.4%	18.9%	27.5%
<b>Stock-Based Compensation</b>	16%	13%	12%	9%	<10%

**\$1B  
ARR  
2029**



# A Compelling Equity Story

1

## Tremendous Growth Potential

Multiple growth levers to build share in a large and growing TAM through the acquisition of new logos and the expansion of existing customer relationships

2

## Diverse Customer Base

Broad and underpenetrated base of customers that spans industries, geographies and company sizes

3

## Strong Financial Profile

Consistent track record of execution, highlighted by strong topline growth, GAAP profitability and meaningful cash flow generation





# Management Q+A



# Confidence Platform Demo



**Dux Raymond Sy**

Microsoft RD & MVP  
Chief Brand Officer, AvePoint

   @meetdux

- Home
- Create
- My Content
- Feed
- Apps
- Copilot
- Outlook
- Teams
- Word
- Excel



# Copilot

Microsoft 365 Chat

Try these prompts Stay on top

- Catch up on meetings**  
Catch me up on meetings I missed yesterday
- Catch up on comms**  
Summarize unread messages from this morning
- Rewrite something**  
Propose a new introduction to file
- Get up to speed**  
List key points from file
- Polish my writing**  
Suggest edits to file to make it
- Catch up on comms**  
What's the latest from person ?

Put together a global sales operations alignment strategy for the remainder of 2024

GENERATE



Home



Create



My Content



Feed



Apps



Copilot



Outlook



Teams



Word



Excel



Copilot

New chat



Put together a global sales operations alignment strategy for the remainder of 2024

To develop a global sales operations alignment strategy for the remainder of 2024, we can draw insights from several key documents and initiatives:

**1. North America Customer Success Framework:** This framework includes strategies for upselling, Q1 attainment, and a new escalation process. It also outlines a renewal campaign aimed at engaging customers proactively to manage renewal effectively and identify potential risks early. 1

**2. Market Forecast Analysis:** This report analyzes global market trends, customer preferences, and competitive...

**3. Organization Reduction and Restructure:** This assess the current organizational structure, including headcount, roles, and responsibilities. It identifies top performers and critical roles necessary for sustain operations. 3

1 | May fy24 all hands

2 | Q4 FY23 Market...

3 | Workforce Reduction

+4

Copy  
2 references

1 of 20 responses AI-generated content may be incorrect



# Connected Issues, Faster Consequences

## Legacy & Fragmented Data

### DATA PROBLEMS

Data Silos, Inconsistent Formats, Outdated Information

## Data Loss & Interruption

### DATA PROBLEMS

Extended Downtime, Data Loss, Reputational Damage



## Overexposed Data

### DATA PROBLEMS

Who Has Access?, Outdated Policies, Misconfigured Controls

## Digital Sprawl

### DATA PROBLEMS

Disorganized Data, App, Agent, Workspace Sprawl  
ROT Data



# 94% OF ALL AI DEPLOYMENTS FAIL TO MOVE PAST A PILOT

*This isn't AI's fault*

*So what's holding us back?*

## Data Quality Concerns

Inaccurate results from the wrong legacy data

## Managing Security at Scale

Prevent oversharing and protect sensitive data

## Ensuring Compliance

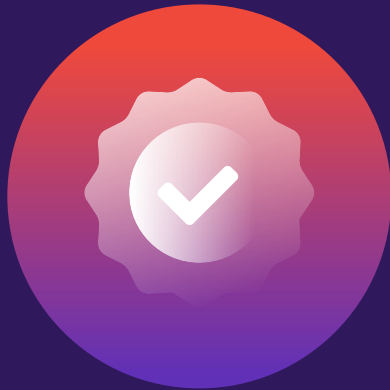
Confidently addressing regulations & requirements

## Demonstrating ROI

Proving the value of investments under pressure



# Trusted Data Foundation



**Reliable Data  
Quality**



**Proactive  
Data  
Security**



**Automated  
Governance**





# Establish a Trusted Data Foundation for AI

**01**

**ENSURE**

reliable data quality

**02**

**INTEGRATE**

proactive data security

**03**

**SCALE**

automated governance



# ENSURE

**reliable data quality**

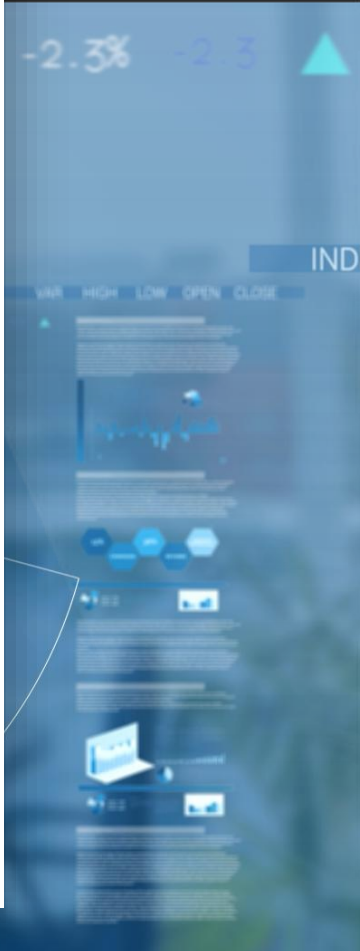
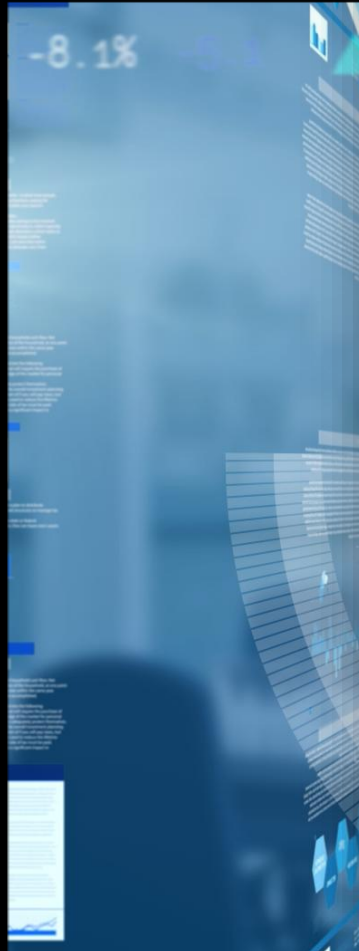




# Challenges with Data Quality

## 2012 Workforce Reduction Plan

[Redacted content]





# Challenges with Data Quality



**Scale and volume of legacy content**



**Complexity of how to tackle it all**



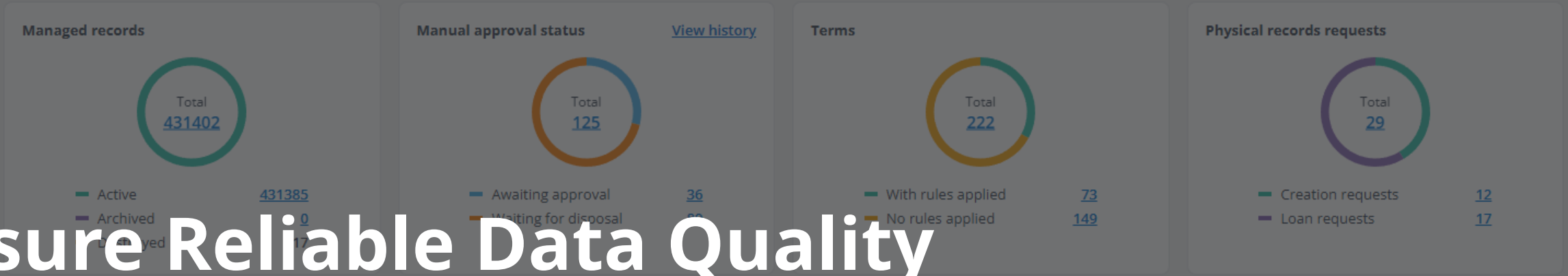
**Resistance to Change**

# Dashboard

Sync now

Information lifecycle Storage optimization Retention and destruction

Last sync time: 2025-11-08 23:50:49 ; Next sync time: 2025-11-09 23:49:00



# Ensure Reliable Data Quality

Exchange Online	62445
Physical Records	33
File System	7

Exchange Online	4
Google Drive	8
Physical Records	11
File System	5
SharePoint On-Premises	1

Physical Records

**START THE TOUR** ➤

Record count by status Teams & Groups Last 12 months

Top 10 users with the most records awaiting approval

# Dashboard

Sync now

Information lifecycle Storage optimization Retention and destruction

Last sync time: 2025-11-08 23:50:49 ; Next sync time: 2025-11-09 23:49:00

- Discovery and analysis
  - Discovery
  - Inactive data
  - ROT data
  - Optimization progress

Start with data discovery—find ROT (redundant, obsolete, trivial data), measure impact, and track progress toward compliant data ready for AI

[← BACK](#) [NEXT →](#)



With rules applied [73](#)  
 to rules applied [149](#)

### Physical records requests



Creation requests [12](#)  
 Loan requests [17](#)

#### Active records by content source

SharePoint Online	<a href="#">172651</a>
OneDrive	<a href="#">196249</a>
Exchange Online	<a href="#">62445</a>
Physical Records	<a href="#">33</a>
File System	<a href="#">7</a>

#### Nodes with settings configured by content source

SharePoint Online	<a href="#">104</a>
OneDrive	<a href="#">7</a>
Exchange Online	<a href="#">4</a>
Google Drive	<a href="#">8</a>
Physical Records	<a href="#">11</a>
File System	<a href="#">5</a>
SharePoint On-Premises	<a href="#">1</a>

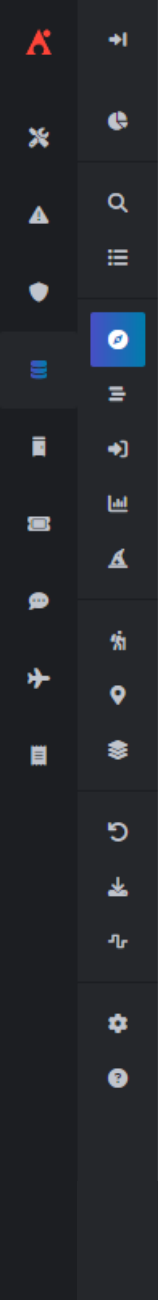
#### Records awaiting approval

SharePoint Online	<a href="#">2</a>
OneDrive	<a href="#">33</a>
Physical Records	<a href="#">1</a>

#### Record count by status

Teams & Groups ▾ Last 12 months ▾

#### Top 10 users with the most records awaiting approval



Content source

Microsoft 365

File System

## Inactive data

Inactive data summary

Inactive data optimization

### Summary

Data size  
**42** GB

File count  
**88,806**

Oldest file  
**144** Months

Version size  
**1** GB

PHL data size  
**1** GB

◀ BACK

NEXT ▶

This dashboard provides a clear, actionable view of your environment—key highlights, and even showing hidden content locked by retention policies so you can quickly identify and act on optimization opportunities.

### Inactive data

Modified time range

From  To

**42**

Data size (GB)

**88,806**

File count



Container	Site collection	Data size (GB)	File count	Inactive data size (GB)
<input type="checkbox"/> Default SharePoint site container	235	38	83,527	38
<input type="checkbox"/> Default Microsoft 365 group team sites container	370	4	5,279	4

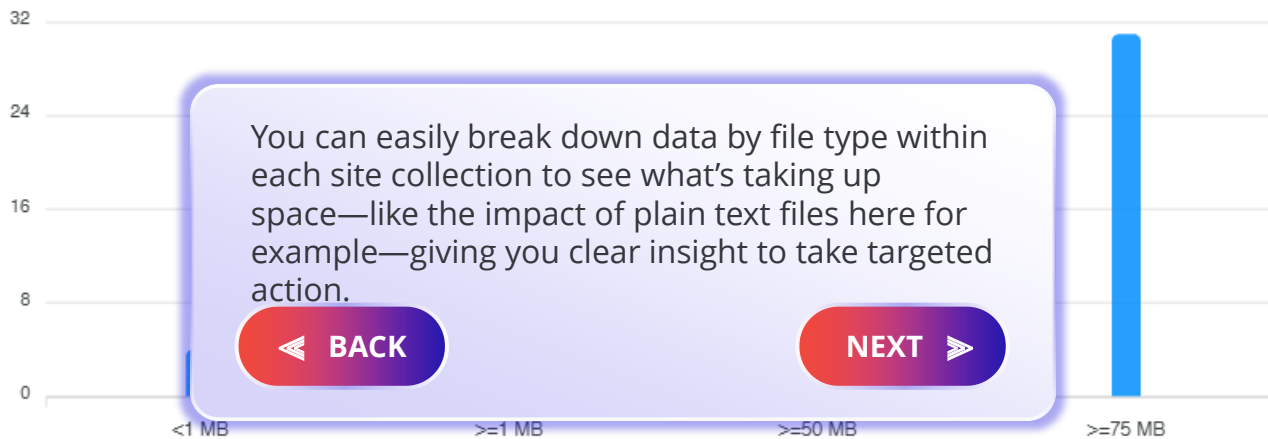
**Ensure Reliable Data Quality**

Search by name

Container	Site collection	Data size (GB)	File count	Inactive data size (GB)
<input type="checkbox"/> Default SharePoint site container	235	38	83,527	38
<input type="checkbox"/> Default Microsoft 365 group team sites container	370	4	5,279	4
<b>Total</b>	<b>605</b>	<b>42</b>	<b>88,806</b>	<b>42</b>

K < 1-2 >

Data size (GB) by file size



Data size (GB) by file type



Save as profile

Content source

Microsoft 365

File System

Search by name



Container	Site collection	Data size (GB)	File count	Inactive data size (GB)
<input type="checkbox"/> Default SharePoint site container	235	38	83,527	38
<input type="checkbox"/> Default Microsoft 365 group team sites container	370	4	5,279	4
<b>Total</b>	<b>605</b>	<b>42</b>	<b>88,806</b>	<b>42</b>

K < 1-2 >

Discovery and analysis

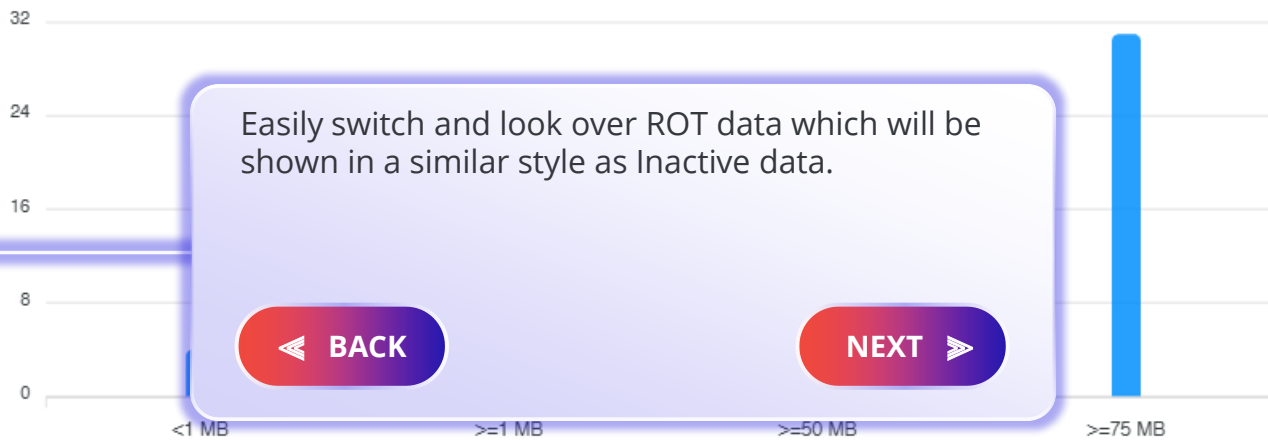
→ Discovery

→ Inactive data

→ ROT data

→ Optimization progress

Data size (GB) by file size



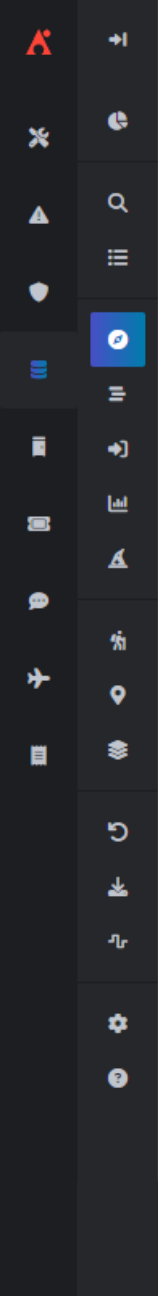
Data size (GB) by file type



Save as profile

Ensure Reliable Data Quality

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Content source

Microsoft 365

File System

The new Ava is here. Ask away!



# ROT data

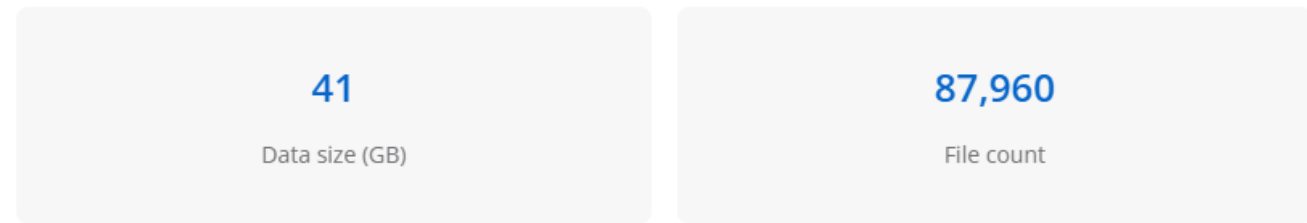
avepointats

ROT data summary ROT data optimization

## Summary



## ROT data



ROT data takes up **98%** of the data size of **42** GB.

## Data size by scope

Search by name



Container	ROT dat

Identify ROT in minutes, not months—The Discovery & Analysis scan will give clear visibility into where inefficiencies live and how they affect your information lifecycle.

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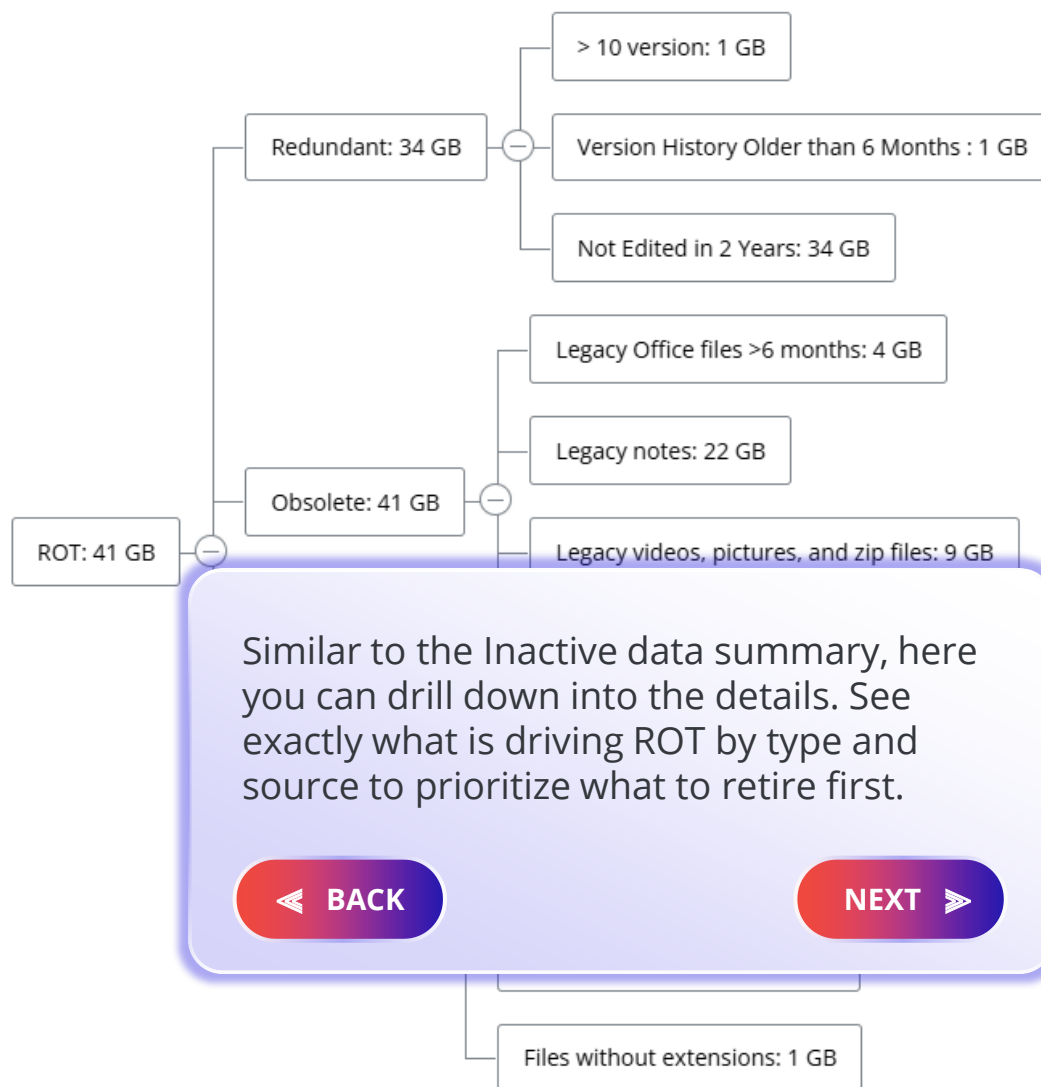
ROT data takes up **98%** of the data size of **42 GB**.

Content source

Microsoft 365

File System

### Data size by ROT rule



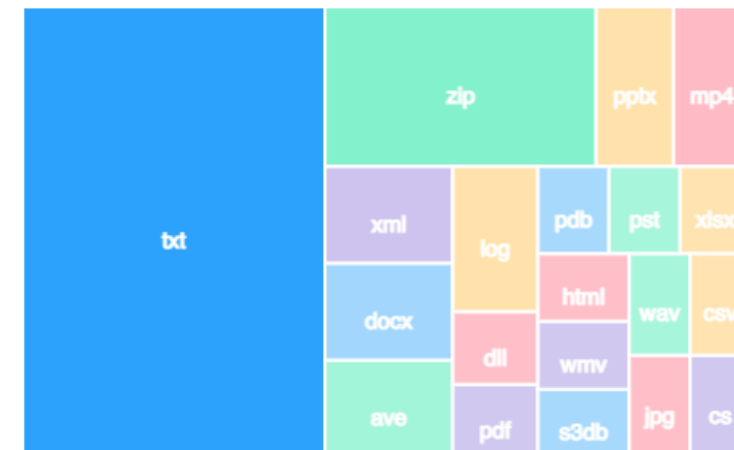
### Data size by scope

Search by name

Container	ROT dat
<input type="checkbox"/> Default SharePoint site container	38
<input type="checkbox"/> Default Microsoft 365 group team sites container	4
<b>Total</b>	<b>41</b>

K < 1-2 >

### Data size (GB) by file type



Ensure Reliable Data Quality

## Terms

AI recommendations Synchronize Export terms

Search by term name, description, or rule name

- Term groups
  - Default
  - Enterprise
  - US Federal Civilian
  - State and Local
  - Life Science Corp
  - Energy
  - DNV
  - SOCOM
  - University
  - Exchange Records Labels

Automatically classify content with centralized **Terms**. Sync across content sources like Microsoft 365 and Google Workspace to keep your information management strategy consistent no matter where you work!

BACK NEXT

## Rules

**Containers**

- My rule containers
  - Default rule container
  - Archive Rules**
  - Google IL Rules
  - M365 ILM Rules
  - Test Rule Container

**Rules**  [Create](#)

*Archive Rules*

- Archive large documents older than 5 years
- Archive documents older than 10 years

SharePoint Online

Criteria	<ul style="list-style-type: none"> <li>1. Document/Email, Document size, &gt;=, 1 MB</li> <li>2. Document/Email, Created time, Older than, 10 Years (1 And 2)</li> </ul>
Rule action	Archive and destroy content; Leave a stub in place for each document

[View details](#)

- Manual Archiving
- Archive decommissioned Teams workspace
- Archive Decommissioned site workspace
- Archive Teams & Groups
- archive txt
- Archive Teams after 2 years no activity

Set automatic rules for classification and action. We help you set retention, deletion, and archival policies you can stay compliant without bloating storage.

[BACK](#) [NEXT](#)

Information management - Opus

- Dashboard
- Search
- My tasks
- Discovery and analysis
- Terms and rules
  - Terms
  - Rules**
  - Approval processes
  - Content sources
  - Reporting
  - Maestro AI
- Physical records
  - Explorer
  - Locations
  - Templates
- Activity
  - Restore center
  - Download center

## Rules

### Containers

Search by name

#### My rule containers

- Default rule container
- Archive Rules
- Google IL Rules
- M365 ILM Rules
- Test Rule Container

Granular settings allow you to automate a variety of actions.

BACK

NEXT

## Create rule

1. Rule overview

2. Rule settings

SharePoint Online Google Drive

What content should be managed by this rule?

Modified ti... Older than 7 Years +

(1)

What would you like to do with the content?

- Destroy content
  - Include related records
  - Include declared records
  - Remove retention label before a document/item is destroyed
  - Leave a stub in place for each document
  - Enable grace period for destruction
- Move content to archival storage
- Declare or tag content
- Export content
- Move content to new location

Enable manual approval?

Ensure Reliable Data Quality

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Our AI engine streamlines policy creation and implementation with personalized recommendations based on industry regulations and standards.

◀ BACK

NEXT ▶

### AI recommendations

Leverage AI-powered analysis to receive tailored classification recommendations optimized for your business needs.

What industry does your business operate in? \*

Health care

What is your country or state?

Queensland Australia

What are your requirements for classification?

Enter your requirements

Classification sample for reference

Upload a sample classification scheme for AI reference based on the [template](#).



Drag a file here, or [browse](#)  
Up to 10 MB (XLSX)

Cancel

Next

### AI Recommendations

Sure, here are some information lifecycle and retention and disposal rules for a company in the education sector in New South Wales, Australia. These rules are designed to ensure compliance with the State Records Act 1998 and other relevant regulations.

#### Information Lifecycle and Retention Rules

##### Student Information

###### 1. Student Enrolment Records

- **Retention Period:** Retain for 7 years after the student has left the school.
- **Modified Time Trigger:** TRIGGER: Student Departure Date + 7 years
- **Disposal Action:** Destroy securely.

###### 2. Student Assessment Records

- **Retention Period:** Retain for 5 years after the end of the school year in which the student was assessed.
- **Modified Time Trigger:** TRIGGER: End of School Year + 5 years
- **Disposal Action:** Destroy securely.

###### 3. Student Attendance Records

- **Retention Period:** Retain for 6 years after the end of the school year.
- **Modified Time Trigger:** TRIGGER: End of School Year + 6 years
- **Disposal Action:** Destroy securely.

###### 4. Student Health Records

- **Retention Period:** Retain for 10 years after the student has left the school or until the student turns 25, whichever is longer.
- **Modified Time Trigger:** TRIGGER: Student Departure Date + 10 years or TRIGGER: Student's 25th Birthday
- **Disposal Action:** Destroy securely.

###### 5. Student Behavioural Records

- **Retention Period:** Retain for 5 years after the student has left the school.
- **Modified Time Trigger:** TRIGGER: Student Departure Date + 5 years
- **Disposal Action:** Destroy securely.

Ensure Reliable Data Quality

- Information management - Opus
- Content sources
- Reporting
- Maestro AI**
- Physical records
- Explorer
- Locations
- Templates
- Activity
- Restore center
- Download center
- Job monitor
- System
- Settings

<input type="checkbox"/>	Partner Information	This folder is dec	
<input type="checkbox"/>	Demos	Materials used to	
<input type="checkbox"/>	User Group	Records related to customer community engage...	4
<input type="checkbox"/>		s related to the creatio...	0
<input type="checkbox"/>		ory for all public-facing...	0
<input type="checkbox"/>		or software lifecycle, d...	0
<input type="checkbox"/>	Implementation	This folder contains records related to the succe...	39

Classify your content swiftly and at scale with automated near-zero-training AI, eliminating the manual guesswork, complexity, and risk of traditional data classification solutions.

[← BACK](#) [NEXT →](#)

Records related to customer community engagement, feedback, and events. Meeting Materials: Agendas, presentation slides, and video recordings from past user group meetings and webinars. Member Communications: Newsletters, event invitations, and feedback surveys sent to the user group members. Collated feedback: Summarized Feature requests, common pain points, and suggestions gathered during sessions, which serve as valuable input for the product roadmap.



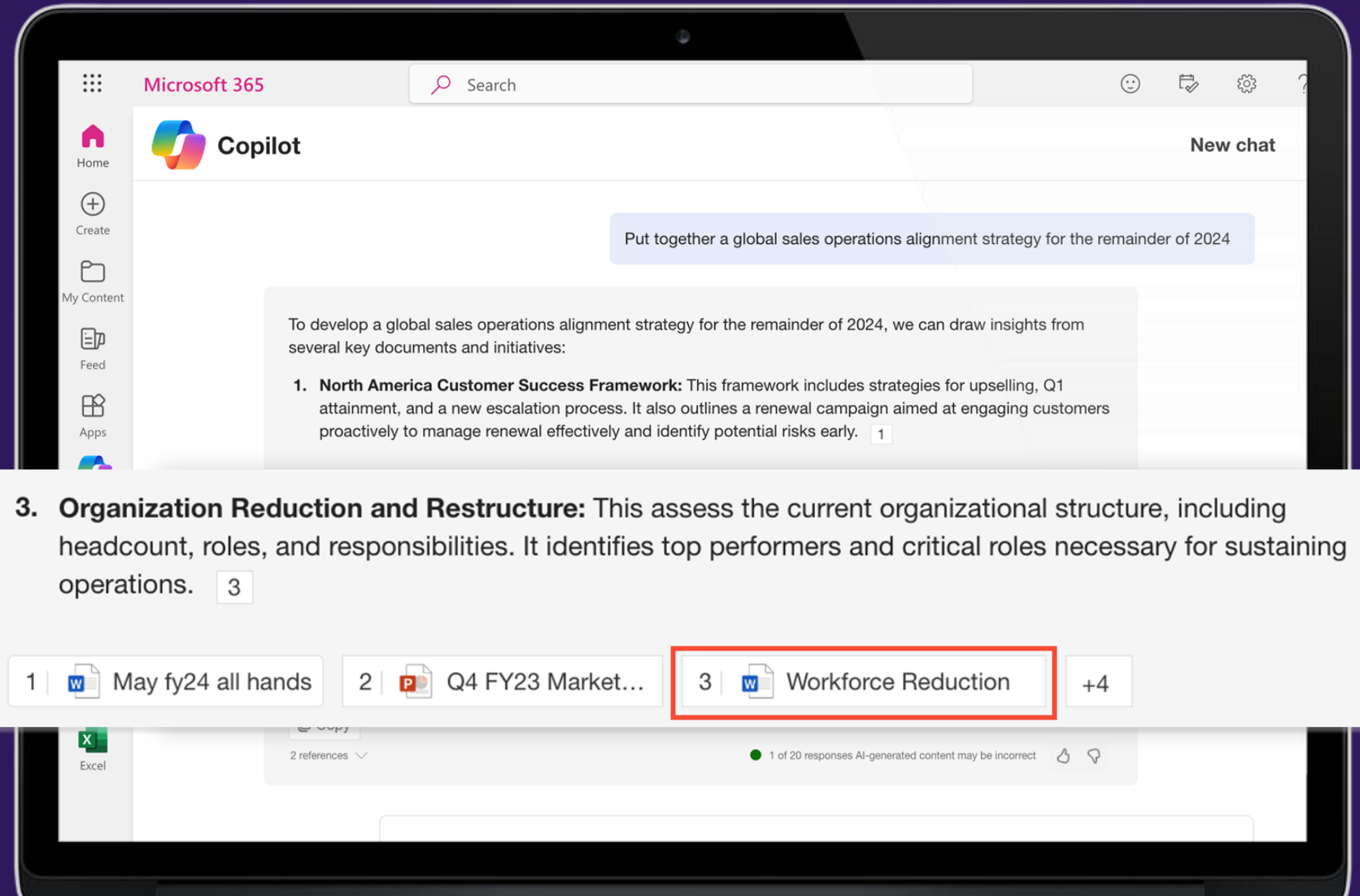
# INTEGRATE

**proactive data security**





# Challenges with Data Security



**3. Organization Reduction and Restructure:** This assess the current organizational structure, including headcount, roles, and responsibilities. It identifies top performers and critical roles necessary for sustaining operations. 3

- 1 | May fy24 all hands
- 2 | Q4 FY23 Market...
- 3 | Workforce Reduction**
- +4

1 of 20 responses AI-generated content may be incorrect



# Challenges with Data Security



**The Permissions  
Spiderweb!**



**Permissions  
Reporting Gaps**

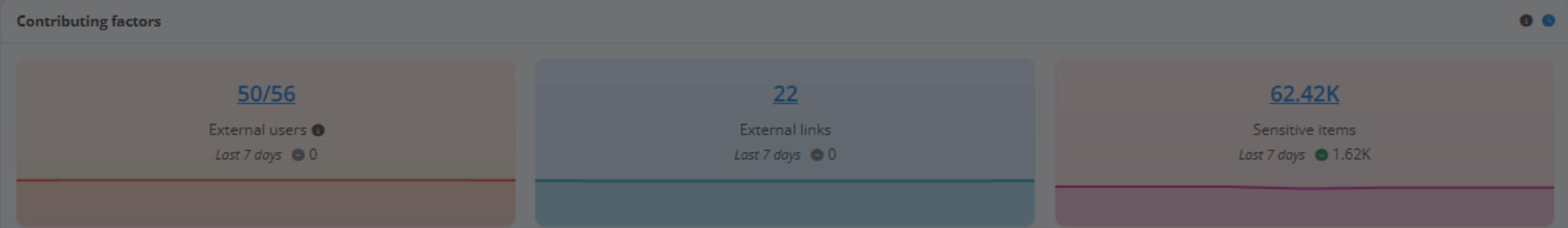


**Users will just  
“mess it up again”**

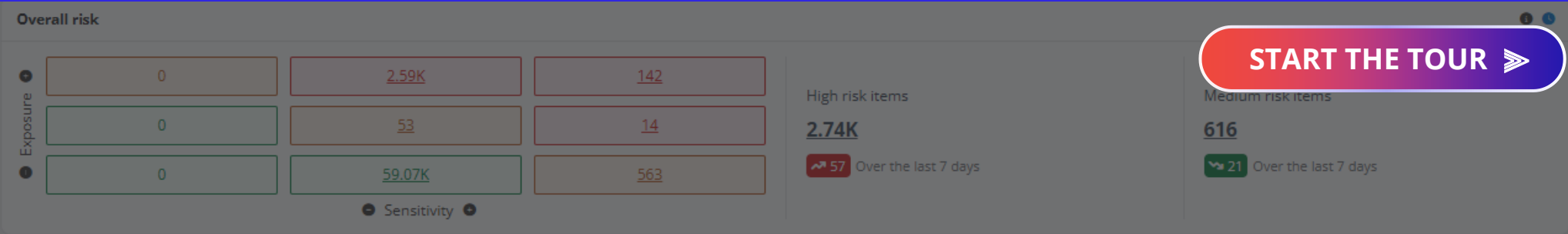
- Risk & Remediation - Insights
- Microsoft 365
- Dashboard
- Microsoft 365 overview
- Microsoft Teams
- SharePoint Online
- OneDrive
- Microsoft 365 Group
- Power BI
- Analysis
- Search profiles
- Activity
- Full scan details
- Job monitor
- Activity explorer
- System

Export DSPM report    Export Excel report

Last 7 days



# Integrate Proactive Data Security



**START THE TOUR** >>>

### External users

Risk & Remediation - Insights

- Microsoft 365
- Dashboard
- Microsoft 365 overview
- Microsoft Teams
- SharePoint Online
- OneDrive
- Microsoft 365 Group
- Power BI
- Analysis
  - Risk analysis
  - Exposure
  - Users
- Search center
  - Quick search
  - Search profiles
- Activity
  - Full scan details
  - Job monitor
  - Activity explorer
- System

Last aggregated time 10/23/2025 15:35:37

The new Ava is here. Ask away!

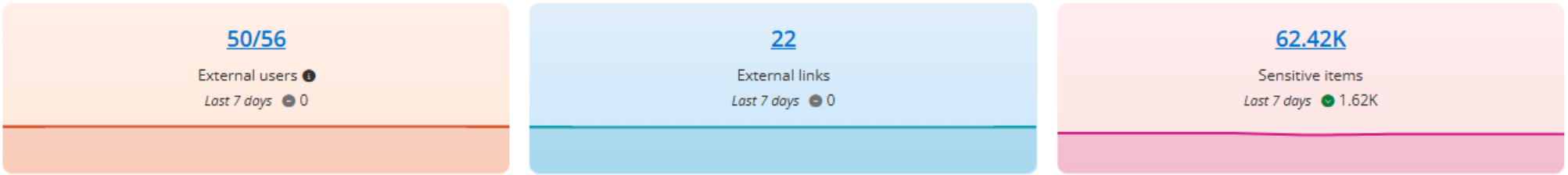


Dashboard > Microsoft 365 overview

Export DSPM report | Export Excel report

Last 7 days

Contributing factors



- 0 Sensitive items shared with Everyone
- 14 Sensitive items shared with Everyone except external users
- 2 Sensitive items shared with Anyone link
- 1 Sensitive items shared with Link for specific external users
- 27 Sensitive items shared with Organization link

Overall risk



External users

The **Insights** dashboard begins to unpack where risk is living in your collaborative spaces with snapshots. Risk and exposure definitions can be customized to fit your specific needs.

BACK | NEXT

- Risk & Remediation - Insights
- Microsoft 365
- Dashboard
- Microsoft 365 overview
- Microsoft Teams
- SharePoint Online
- OneDrive
- Microsoft 365 Group
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- Analysis
  - Risk analysis
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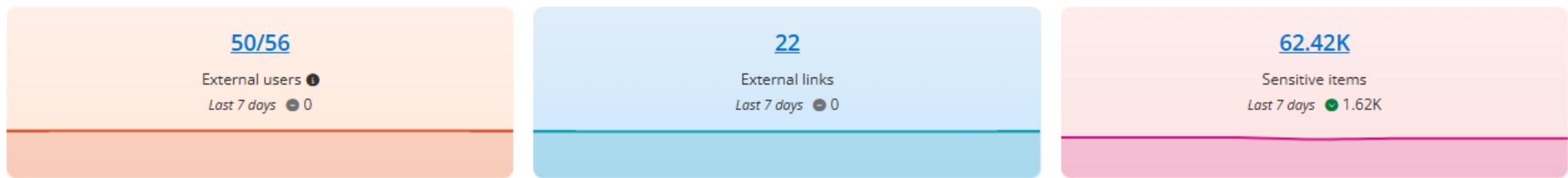
AR

Dashboard > Microsoft 365 overview

Export DSPM report    Export Excel report

Last 7 days

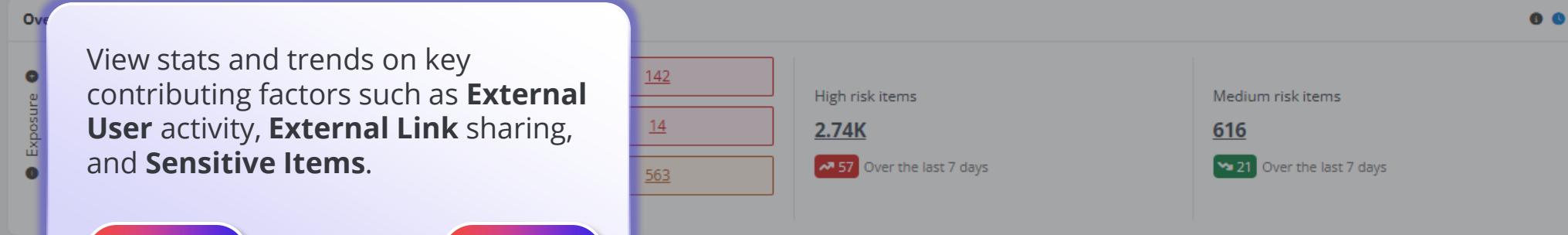
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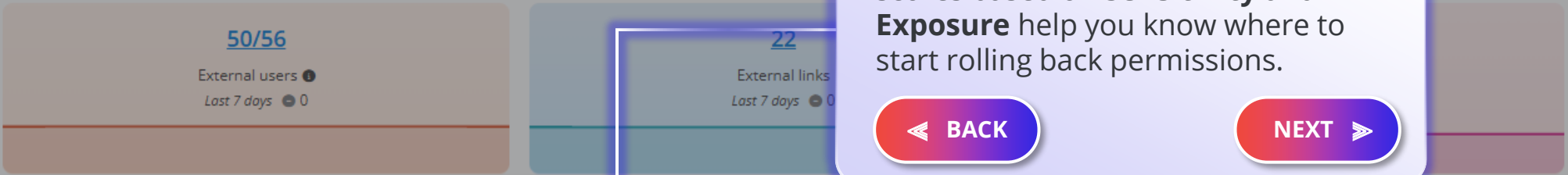
View stats and trends on key contributing factors such as **External User** activity, **External Link** sharing, and **Sensitive Items**.

◀ BACK      NEXT ▶



Export DSPM report | Export Excel report

Contributing factors



- 0 Sensitive items shared with Everyone
- 14 Sensitive items shared with Everyone except external users
- 2 Sensitive items shared with Anyone link
- 1 Sensitive items shared with Link for specific external users
- 27 Sensitive items shared with Organization link

Immediately identify your risk landscape with a heatmap. Risk scores based on **Sensitivity** and **Exposure** help you know where to start rolling back permissions.

BACK | NEXT

Overall risk

Exposure	0	2.59K	142
	0	53	14
	0	59.07K	563
	Sensitivity		

High risk items  
2.74K  
57 Over the last 7 days

Medium risk items  
616  
21 Over the last 7 days

External users

Risk & Remediation - Insights

- Microsoft 365
- Dashboard
- Microsoft 365 overview
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- OneDrive
- Microsoft 365 Group
- Power BI

Analysis

- Risk analysis
- Exposure
- Users

Search center

- Quick search
- Search profiles

Activity

- Full scan details
- Job monitor
- Activity explorer

System

Last aggregated time 10/23/2025 15:35:37

The new Ava is here. Ask away!



Dashboard > Microsoft 365 overview

### External users

**External user statistics**

- 18** Groups with external users
- 19** External users with access
- 15** Signed in within last 90 days

**External users with the most permissions**

- MB** Murugan Balaji 7
- NG** Nick Palermo.guest 1
- RH** 1
- T** 1

[View all](#)

**Summary**

**Microsoft Teams**

- 349** Total Teams
- 10** Teams with guest users
- 21** High risk Teams
- 32** Teams with high risk items

**SharePoint Online**

- 255** Total site collections
- 0** Site collections shared with external users
- 7** High risk site collections
- 18** Site collections with high risk items

**OneDrive**

- 94** Total OneDrives
- 13** OneDrives shared via link
- 1** High risk OneDrives
- 8** OneDrives shared with external users

**Microsoft 365 Group**

- 80** Total Microsoft 365 Groups
- 2** High risk Microsoft 365 Groups

Monitor external user access, flagging highly-accessed workspaces and areas for permissions review to prevent over-sharing and shadow IT.

**BACK** **NEXT**

### External users

**External user statistics**

**18**  
Groups with external users

---

**19**  
External users with access

---

**15**  
Signed in within last 90 days

**External users with the most permissions**

- MB [Murugan Balaji](#) 7
- NG [Nick Palermo guest](#) 1
- RH [Ray Hill](#) 1
- T [tomg.avepoint](#) 1

[View all](#)

### Summary

**Microsoft Teams**

<a href="#">349</a> Total Teams	<a href="#">21</a> High risk Teams
<a href="#">10</a> Teams with guest users	<a href="#">32</a> Teams with external users

**SharePoint Online**

<a href="#">255</a> Total site collections	<a href="#">7</a> High risk Site collections
<a href="#">0</a> Site collections shared with external users	<a href="#">18</a> Site collections with external users

**OneDrive**

<a href="#">94</a> Total OneDrives	<a href="#">1</a> High risk OneDrives
<a href="#">13</a> OneDrives shared via link	<a href="#">8</a> OneDrives shared with external users

**Microsoft 365 Group**

<a href="#">80</a> Total Microsoft 365 Groups	<a href="#">2</a> High risk Microsoft 365 Groups
---	--

Get a summarized view of external sharing including top groups with external users and top external users with the most access.

◀ BACK
NEXT ▶

External users

Get a summarized view of data access within every Microsoft 365 or Google collaborative application.

BACK NEXT

External users with the most permissions

Sites with direct access

	<a href="#">Murugan Balaji</a>	7
	<a href="#">Nick Palermo guest</a>	1
	<a href="#">Ray Hill</a>	1
	<a href="#">tomg.avepoint</a>	1
<a href="#">View all</a>		

Summary

Microsoft Teams

<a href="#">349</a> Total Teams
<a href="#">10</a> Teams with guest users

<a href="#">21</a> High risk Teams
<a href="#">32</a> Teams with high risk items

SharePoint Online

<a href="#">255</a> Total site collections
<a href="#">0</a> Site collections shared with external users

<a href="#">7</a> High risk site collections
<a href="#">18</a> Site collections with high risk items

OneDrive

<a href="#">94</a> Total OneDrives
<a href="#">13</a> OneDrives shared via link

<a href="#">1</a> High risk OneDrives
<a href="#">8</a> OneDrives shared with external users

Microsoft 365 Group

<a href="#">80</a> Total Microsoft 365 Groups
---

<a href="#">2</a> High risk Microsoft 365 Groups
--

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  - Users
- Search center
  - Quick search**
  - Search profiles
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  - Settings
  - System auditor
  - System event
  - Help & Resources

Discover Policies  
Intelligent remediation

[Learn more](#)

Last aggregated time 10/24/2025 15:48:34

Quick search

Quick search allows you to search for a specific user, group, or object to view the corresponding access report or permission report simply. To search for multiple terms (like the permissions of all external users in a domain), you can save a search profile without having to recreate this search.

JP John Peluso ✕

JP

**John Peluso**

John.Peluso@avepointats.com

Known risk for Microsoft 365

---

Known risk for Power BI

Membership

This table shows the site collections to which the user has been given direct access or where permissions are inherited from SharePoint groups. These are permissions you can control. You can click a site collection to drill down and view more details.

Refresh

Total 26 items

	Site name	Object type	Permission	Created by	External sharing	Site status
<input type="checkbox"/>	<b>2017 Audit</b>	Site collection	Full Control, Restricted...	John Peluso	Only people in your or...	Active
<input type="checkbox"/>	<b>2018 Audit</b>	Site collection	Full Control, Restricted...	John Peluso	Only people in your or...	Active

Make a pilot of Copilot or Gemini inclusive of security team requirements. Quick Search will allow you to quickly spot check permissions and take corrective action.

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## Integrate Proactive Data Security


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**John Peluso**  
 John.Peluso@avepointats.com

Export all

For deeper risk insights, browse to the **Risk Analysis** reports.

Known risk for Micros


Search by site name

Filter Columns

This table shows the s... permissions are inherited from SharePoint groups. These are permissions you can control.

Refresh

Total 26 items

<input type="checkbox"/>	Site name	Object type	Permission	Created by	External sharing	Site status
<input type="checkbox"/>	 2017 Audit	 Site collection	Full Control, Restricted...	John Peluso	Only people in your or...	Active
<input type="checkbox"/>	 2018 Audit	 Site collection	Full Control, Restricted...	John Peluso	Only people in your or...	Active

Risk & Remediation - Insights

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The new Ava is here. Ask away! AR

Risk analysis > Detailed records

All Microsoft 365 workspaces

See a full detailed analysis of potentially risky activities, with flexible options to **sort, filter, and search.**

BACK NEXT

Search by name

Export for all Refresh

Filter Columns High Risk

0 of 2741 selected

<input type="checkbox"/>	Name	Object type	Created by	Site name	Risk level	Sensitivity level	Exposure level
<input type="checkbox"/>	PointPublishing ...	Site collection	ATSAdmin	PointPublishing Hub...	High	Medium	High
<input type="checkbox"/>	Contoso Purcha...	File	ATSAdmin	PointPublishing Hub...	High	Medium	High
<input type="checkbox"/>	ElectronicFundT...	File	Murugan Balaji	PointPublishing Hub...	High	Medium	High
<input type="checkbox"/>	LoanApplication...	File	Murugan Balaji	PointPublishing Hub...	High	High	High
<input type="checkbox"/>	Northwind Cust...	File	ATSAdmin	PointPublishing Hub...	High	Medium	High
<input type="checkbox"/>	LoanAppeelicat...	File	Murugan Balaji	PointPublishing Hub...	High	High	High
<input type="checkbox"/>	MB_ElectronicFu...	File	Murugan Balaji	PointPublishing Hub...	High	Medium	High
<input type="checkbox"/>	ElectronicFundT...	File	Murugan Balaji	PointPublishing Hub...	High	Medium	High
<input type="checkbox"/>	AvePoint, Inc Te...	Site collection	N/A	AvePoint, Inc Team ...	High	High	High

Click "Detailed Information" for more

**BACK** **NEXT**

Search by name

Export for all Refresh

Columns High Risk

0 of 2741 selected

<input type="checkbox"/>	Name	Object type	Created by	Site name	Risk level	Sensitivity level	Exposure level
<input type="checkbox"/>	PointPublishing ...	Site collection	ATSAAdmin	PointPublishing Hub...	High	Medium	High
<input checked="" type="checkbox"/>	Contoso Purcha...	File	ATSAAdmin	PointPublishing Hub...	High	Medium	High
<input type="checkbox"/>	ElectronicFundT...	File	Murugan Balaji	PointPublishing Hub...	High	Medium	High
<input type="checkbox"/>	LoanApplication...	File	Murugan Balaji	PointPublishing Hub...	High	High	High
<input type="checkbox"/>	Northwind Cust...	File	ATSAAdmin	PointPublishing Hub...	High	Medium	High
<input type="checkbox"/>	LoanAppeelicat...	File	Murugan Balaji	PointPublishing Hub...	High	High	High
<input type="checkbox"/>	MB_ElectronicFu...	File	Murugan Balaji	PointPublishing Hub...	High	Medium	High
<input type="checkbox"/>	ElectronicFundT...	File	Murugan Balaji	PointPublishing Hub...	High	Medium	High
<input type="checkbox"/>	AvePoint, Inc Te...	Site collection	N/A	AvePoint, Inc Team ...	High	High	High

- Detailed information
- View permissions
- View activities
- View activities in Insights
- Manage sensitivity label
- Notify
- Add tag
- Open in SharePoint

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Last aggregated time 10/24/2025 15:48:34

The new Ava is here. Ask away!



Risk analysis > Detailed records > Detailed information

### Contoso Purchasing Permissions.docx

https://avepointats.sharepoint.com/sites/hub/docave online report center reports/cas/contoso p

Review and roll back permissions...

◀ BACK

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Permissions Activities Details

Everyone except external users

2

Large groups

2

Remove permissions

Refresh

1 of 7 selected

<input type="checkbox"/>	User/Group	External users	Permission	Type
<input checked="" type="checkbox"/>	Contributors	0	Contributor	SharePoint group
<input type="checkbox"/>	Creators	0	Creator	SharePoint group
<input type="checkbox"/>	PointPublishing Hub Site Me...	0	Edit, Contribute	SharePoint group
<input type="checkbox"/>	Site collection administrators	0	Full control	SharePoint group

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The new Ava is here. Ask away!



Risk analysis > Detailed records > Detailed information

### Contoso Purchasing Permissions.docx

https://avepointats.sharepoint.com/sites/hub/docave online report center reports/cas/contoso p

Audit activities...

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NEXT ▶

Permissions Activities Details

Export Refresh

Filter

Activity time	IP address	User	App name	Activity	Object ID	Item type	More information
5/5/2025 09:09:27	38.105.223.146	christian.sontag@...		Accessed file	.../sites/hub/docav...	File	Accessed from "do...
4/2/2025 12:17:59	2a01:111:f402:f06...	joe.bartnik@avepo...		Previewed file	.../sites/hub/docav...	File	
4/2/2025 12:17:55	20.190.135.44	joe.bartnik@avepo...		Previewed file	.../sites/hub/docav...	File	
3/5/2025 15:37:08	76.141.55.169	joe.bartnik@avepo...		Accessed file	.../sites/hub/docav...	File	Accessed from "do...
3/5/2025 15:37:17	76.141.55.169	jeffrey.hyman@av...		Accessed file	.../sites/hub/docav...	File	Accessed from "D...
3/6/2025 14:51:57	20.190.161.25	joe.bartnik@avepo...		Previewed file	.../sites/hub/docav...	File	
3/6/2025 09:53:11	2600:6c5a:9f0:61f...	jeffrey.hyman@av...		Accessed file	.../sites/hub/docav...	File	Accessed from "D...
3/6/2025 09:53:12	2600:6c5a:9f0:61f...	jeffrey.hyman@av...		Previewed file	.../sites/hub/docav...	File	

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Last aggregated time 10/24/2025 15:48:34

The new Ava is here. Ask away!



Risk analysis > Detailed records > Detailed information

Permissions Activities **Details**

### Basic information

Created time	7/6/2018 12:11:47
Last modified time	7/6/2018 13:24:41
Created by	ATSAAdmin
Object type	File
Site collection URL	.../sites/hub
Location	.../docave online report center reports/cas/contoso purchasing permissions.docx
Retention label	N/A

### Risk information

Risk level	High
Exposure level	High
Exposure rule	Shared with everyone except external users Shared with 2 large Microsoft Entra groups in which users are more than 20.
Sensitivity level	Medium
Sensitivity label	Confidential
Sensitive info type	Credit Card Number U.S. Bank Account Number EU Debit Card Number

...and understand WHY it was tagged high risk due to Sensitivity and Exposure definitions.

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Dashboard

Explore our pre-built policy templates!

**AI Confidence**

AI Confidence for Groups or Teams

Deploy AI with confidence by setting up policies with our recommended rules for governing your Microsoft 365 Groups or Teams.

[6 rules applied](#)

**AI Confidence**

AI Confidence for Sites

Deploy AI with confidence by setting up policies with our recommended rules for governing your sites.

[1 rules applied](#)

**Content Sensitivity Control**

Control the sensitivity of your Microsoft 365 Groups or Teams content.

[5 rules applied](#)

**Data Protection**

Get started with our recommended rules for securing your Microsoft 365 Groups or Teams data.

[4 rules applied](#)

**External Sharing**

Monitor sharing in your Microsoft 365 Groups or Teams to prevent unauthorized data.

[2 rules applied](#)

Compliance overview

Compliant rules	Non-compliant rules	Fixed violations	Unfixed violations
14	4	66	542

**Microsoft 365 Group**

No job run yet.

**SharePoint site**

1 non-compliant rules  
32 violations

**Microsoft Team**

2 non-compliant rules  
470 violations

Our **Policies** dashboard is your place to review and apply governance policies that detect and correct oversharing across SharePoint, Teams, OneDrive, and Microsoft 365 Groups.

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Scope coverage by object type

Microsoft 365 Group	0/136
Microsoft Team	640/793
SharePoint site	270/350

Dashboard

Explore our pre-built policy templates!

AI Confidence for Groups or Teams

Deploy AI with confidence by setting up policies with our recommended rules for governing your Microsoft 365 Groups or Teams. [6 rules applied](#)

Compliance overview

Compliant rules

14

Microsoft 365 Group

No job run yet.

### AI Confidence for Groups or Teams

Deploy AI with confidence by setting up policies with our recommended rules for governing your Microsoft 365 Groups or Teams.

Template available for: AI Confidence

#### Rules in this policy

- Classification Enforcement**  
Enforce that all Groups or Teams have a classification assigned to them and assign a default classification if there is none.
- External Sharing Settings**  
Control the external sharing settings for Groups or Teams.
- Access Request Settings**  
Control access request settings within a site to manage who can request and approve access to a site.
- Owner Number Restriction**  
Control the number of owners in Microsoft 365 Groups, Teams, security groups, and distribution lists.
- Privacy Restriction**

Close Use template

Pre-built templates can be applied in seconds to tighten governance: control access request settings, cap the number of owners, adjust privacy settings, and remove shadow users. Together, these controls curb permission sprawl and keep workspaces aligned with your standards for Copilot rollouts.

BACK NEXT

Scope coverage

Scope coverage by object type

- Microsoft 365 Group ..... 0/136
- Microsoft Team ..... 640/793
- SharePoint site ..... 270/350

Create your own policy from scratch, such as expiring sharing links. Instantly curb oversharing by automatically removing access after 30 days for links shared with anyone or with people inside the organization (even large groups), and we will outline a phased rollout that avoids user disruption.

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### Other settings

#### Schedule \*

Scan interval

1

Days

Scan start time

12:21



#### Retention duration \*

How many days would you like to retain the data associated

5

## Add rule for Microsoft Team



⌚ Depending on the scale of your Microsoft 365 environment, jobs for the policy containing this rule can take a significant amount of time to complete. We recommend that you configure a lower frequency for the schedule of the policy.

Monitor private channel sites

### Rule settings

Configure the expiration date for sharing links shared with anyone

Configure the expiration date for sharing links shared with people in your organization

These sharing links must expire within  days

Configure the expiration date for sharing links shared with specific users and groups

These sharing links must expire within  days

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**AI Confidence**

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**AI Confidence**

AI Confidence for Sites

Deploy AI with confidence by setting up policies with our recommended rules for governing your sites. [1 rules applied](#)

**Content Sensitivity**

Control the sensitivity of content in your Microsoft 365 Groups or Teams. [5 rules applied](#)

After your policies are set, monitor for changes such as new permissions or content changes and automatically enforce your rules. Manual and automatic remediation options give you flexibility across your tenants.

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### Compliance overview

Compliant rules	Non-compliant rules	Fixed violations	Unfixed violations
14 <span style="color: green;">✔</span>	4 <span style="color: red;">✘</span>	66 <span style="color: blue;">🔧</span>	542 <span style="color: orange;">⚠</span>

**Microsoft 365 Group**

⌛ No job run yet.

**SharePoint site**

✘ [1 non-compliant rules](#)  
⚠ [32 violations](#)

**Microsoft Team**

✘ [2 non-compliant rules](#)  
⚠ [470 violations](#)

0

Total violations fixed 🔧

0

Total violations detected 🔍

**Scope coverage**

Scope coverage by object type

- Microsoft 365 Group ..... 0/136
- Microsoft Team ..... 640/793
- SharePoint site ..... 270/350



# SCALE

**automated data governance**





# Agents Are the New Endpoints

**60%**

**of new enterprise AI deployments in 2025 are AI Agents<sup>1</sup>**

**1 in 3**

**organizations experienced at least one AI agent-related security incident in the last 12 months<sup>2</sup>**

**8%**

**of organizations have mature AI governance frameworks<sup>3</sup>**





**Agents are decentralized**



**Autonomy increase risks**



**Data is unpredictable and unstructured**

**Traditional Security No Longer Applies**



# AgentPulse

AgentPulse gives you a clear look at all the AI Agents being used in your organization. Think of it as a command center for your AI. It tracks how often your AI agents are used, how people are engaging with them, and how well they are performing. This helps you keep an eye on important trends, spot anything unusual or risky, and maintain complete control over all your deployed AI agents.

## Get the Full Story: Analyze and Act with Confidence

You're currently seeing a summary of general activity. To get a full picture of what's happening—including details on high-risk activities, key user trends, and who's accessing sensitive data—upgrade your view. This will give you the complete insights you need to better protect your environment.

▶ Get Started

Date range: Last 30 days

Filter

### Total agents

60

↑ 7% than the last 7 days

### Total Microsoft agents

E.g. Microsoft Foundry, Copilot Studio, and SharePoint

52

↑ 9% than the last 7 days

### Total Google agents

E.g. Vertex AI

8

↑ 3% than the last 7 days

# Scale Automated Governance

### Agent activities

By agent type



### Most active agents

By activity count

<b>Learning Path Curator</b> Microsoft Foundry	598 activities
<b>Code Review Assistant</b> Vertex AI	591 activities
<b>HR Agent</b>	530

### Most inactive agents

By activity count

<b>SharePoint Site Provisioner</b> Microsoft Foundry	126 activities
<b>HR Policy Advisor</b> Microsoft Foundry	98 activities
<b>Customer Engagement Specialist</b>	69

START THE TOUR ▶

Google agents are coming soon. Stay tuned for multi-cloud observability with Google agent types.

# AgentPulse

AgentPulse gives you a clear look at all the AI Agents being used in your organization. Think of it as a command center for your AI. It tracks how often your AI agents are used, how people are engaging with them, and how well they are performing. This helps you keep an eye on important trends, spot anything unusual or risky, and maintain complete control over all your deployed AI agents.

Monitor AI agent activity over the past 7 days. Real-time operational insights help identify spikes or drops in usage that highlight risks, measure performance, validate adoption, and support better agent governance.

**BACK** **NEXT**

<b>Total agents</b> <b>60</b> ↑ 7% than the last 7 days	<b>Total Microsoft agents</b> E.g. Microsoft Foundry, Copilot Studio, and SharePoint <b>52</b> ↑ 9% than the last 7 days	<b>Total Google agents</b> E.g. Vertex AI <b>8</b> ↑ 3% than the last 7 days
---	---	---

<b>Microsoft 365</b> <a href="#">View agent types</a> <b>20</b>	<b>Copilot Studio</b> <b>11</b>	<b>SharePoint</b> <b>9</b>	<b>Microsoft Foundry</b> <b>12</b>	<b>Vertex AI</b> <b>8</b>
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<b>Agent activities</b>	<b>Most active agents</b>	<b>Most inactive agents</b>
-------------------------	---------------------------	-----------------------------

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The Total Agents card displays the current number of AI agents in your tenant and how that number has changed over the last week. Tiles to the right display AI agents by platform.

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## Total agents

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## Total Microsoft agents

E.g. Microsoft Foundry, Copilot Studio, and SharePoint

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## Microsoft 365

[View agent types](#)

20

## Copilot Studio

11

## SharePoint

9

## Microsoft Foundry

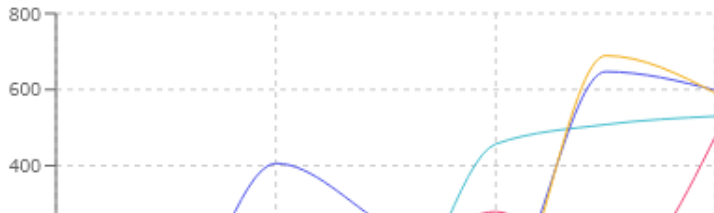
12

## Vertex AI

8

## Agent activities

By agent type



## Most active agents

By activity count

### Learning Path Curator

Microsoft Foundry

598

activities

### Code Review Assistant

Vertex AI

591

activities

### HR Agent

Copilot Studio

530

activities

## Most inactive agents

By activity count

### SharePoint Site Provisioner

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98

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### Customer Engagement Specialist

Copilot Studio

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Scale Automated Governance

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Get the Full Story: Analyze and Act with Confidence

See your most active AI agents. Highly active agents consume more compute, memory, and bandwidth. They also correlate with high user engagement or critical workflows. Tracking them identifies which agents deliver the most value and guide informed investment decisions

Filter

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---	------------------------------------	-------------------------------	---------------------------------------	------------------------------



### Most active agents

By activity count

<b>Learning Path Curator</b> <i>Microsoft Foundry</i>	<b>598</b> <i>activities</i>
<b>Code Review Assistant</b> <i>Vertex AI</i>	<b>591</b> <i>activities</i>
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### Most inactive agents

By activity count

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E.g. Vertex AI

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↑ 3% than the last 7 days

### Microsoft 365

[View agent types](#)

20

### Copilot Studio

11

### SharePoint

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### Microsoft Foundry

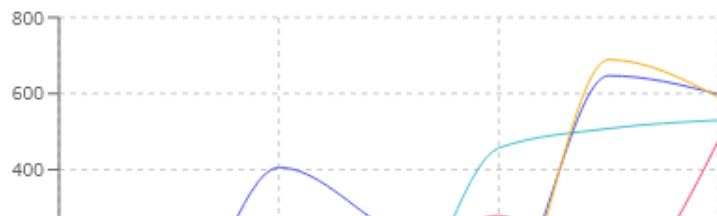
12

### Vertex AI

8

### Agent activities

By agent type



### Most active agents

By activity count

#### Learning Path Curator

Microsoft Foundry

#### Code Review Assistant

Vertex AI

#### HR Agent

Copilot Studio

591

activities

#### HR Policy Advisor

Microsoft Foundry

#### Customer Engagement Specialist

Copilot Studio

126

activities

98

activities

69

activities

See Agent activity for both Microsoft and Google in a single view, across tenants

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Scale Automated Governance

60

↑ 7% than the last 7 days

52

↑ 9% than the last 7 days

8

↑ 3% than the last 7 days

Microsoft 365  
[View agent types](#)

20

Copilot Studio

11

SharePoint

9

Microsoft Foundry

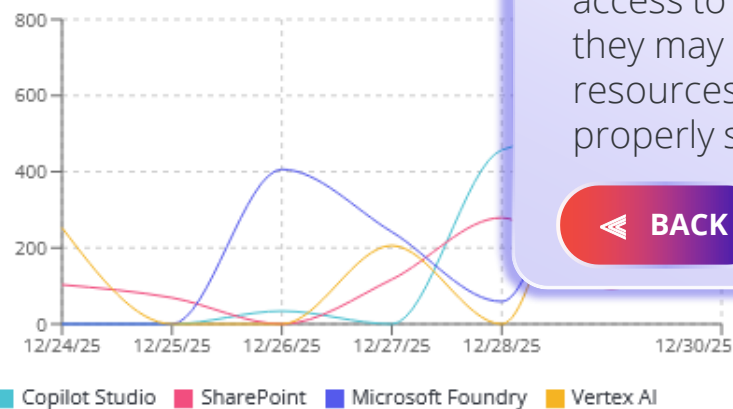
12

Vertex AI

8

### Agent activities

By agent type



See your inactive agents to manage risks and expenses. Inactive agents may still have access to sensitive data or permissions, and they may consume computational resources, storage, or API calls if not properly shut down.

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### Most inactive agents

By activity count

<b>SharePoint Site Provisioner</b> <i>Microsoft Foundry</i>	126 <i>activities</i>
<b>HR Policy Advisor</b> <i>Microsoft Foundry</i>	98 <i>activities</i>
<b>Customer Engagement Specialist</b> <i>Copilot Studio</i>	69 <i>activities</i>
<b>Smart Customer Support Agent</b> <i>Vertex AI</i>	61 <i>activities</i>
<b>Content Creation Expert</b> <i>SharePoint</i>	51 <i>activities</i>

598  
*activities*

591  
*activities*

530  
*activities*

509  
*activities*

478  
*activities*

### Most active users

By activity count

User	Title	Activity count
Tom Hanks	Product Strategy...	1817

### Agent creation trend

By day



### Top agent creators

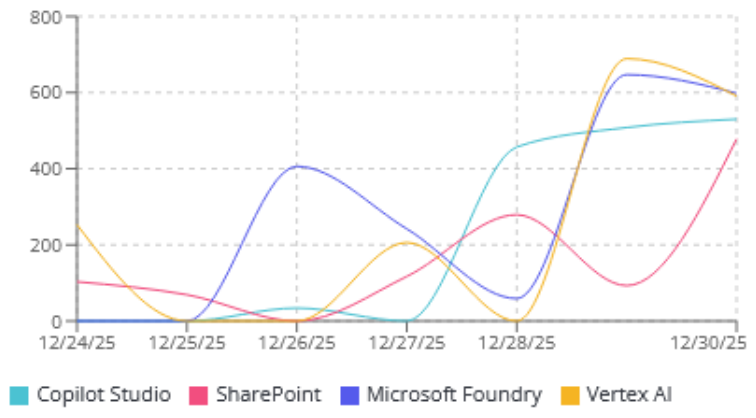
Creation & Activity

<b>AJ</b> Allison Johnson 7 agents created	598 <i>activities</i>
---	--------------------------

## Scale Automated Governance

### Agent activities

By agent type



### Most active agents

By activity count

<b>Learning Path Curator</b> <i>Microsoft Foundry</i>	<b>598</b> <i>activities</i>
<b>Code Review Assistant</b> <i>Vertex AI</i>	<b>591</b> <i>activities</i>
<b>HR Agent</b> <i>Copilot Studio</i>	<b>530</b> <i>activities</i>
<b>Data Analysis Agent</b> <i>Vertex AI</i>	<b>509</b> <i>activities</i>
<b>Knowledge Base Assistant</b> <i>SharePoint</i>	<b>478</b> <i>activities</i>

### Most inactive agents

By activity count

<b>SharePoint Site Provisioner</b> <i>Microsoft Foundry</i>	<b>126</b> <i>activities</i>
<b>HR Policy Advisor</b> <i>Microsoft Foundry</i>	<b>98</b> <i>activities</i>
<b>Customer Engagement Specialist</b> <i>Copilot Studio</i>	<b>69</b> <i>activities</i>
<b>Smart Customer Support Agent</b> <i>Vertex AI</i>	<b>61</b> <i>activities</i>
<b>Content Creation Expert</b> <i>SharePoint</i>	<b>51</b> <i>activities</i>

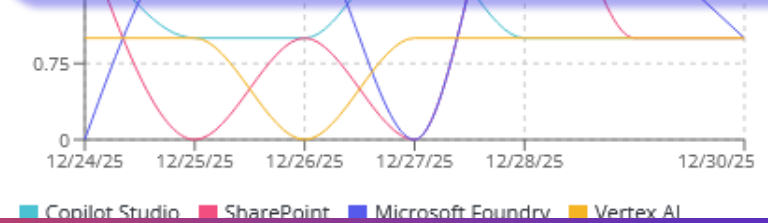
### Most active users

By activity count

User	Title	Activity count
Tom Hanks	Product Strategy...	1817
Abigail Fisher	Data Analyst	1495
Allison Johnson	People Team, Dir...	1479
Franklin Weaver	IT Administrator	1032
Penelope Frank	Data Analyst	916

Track your most active users to gain insight into engagement, value, and risk management. Engaging power users can drive informed system enhancements and understand ROI.

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### Top agent creators

Creation & Activity

<b>AJ</b> Allison Johnson 7 agents created	<b>598</b> <i>activities</i>
<b>TH</b> Tom Hanks 4 agents created	<b>244</b> <i>activities</i>
<b>AB</b> Adrian Beaumont 4 agents created	<b>115</b> <i>activities</i>
<b>AF</b> Abigail Fisher 4 agents created	<b>51</b> <i>activities</i>
<b>FW</b> Franklin Weaver 3 agents created	<b>24</b> <i>activities</i>

# Scale Automated Governance

### Agents accessing the most files

Over the last 30 days

Agent name	Type	Files accessed
<b>Learning Path Curator</b>	Azure AI Foundry	598
<b>Code Review Assistant</b>	Vertex AI	591
<b>HR Agent</b>	Copilot Studio	530
<b>Data Analysis Agent</b>	Vertex AI	509
<b>Knowledge Base Assi...</b>	SharePoint	478

### Top labels accessed

Over the last 30 days

Sensitivity label	Files accessed
Private	1505
Public	1472
Protected Health Information (PHI)	1407
Highly Confidential	1362
Financial Data	1331

### Pay-as-you-go users

Top agent users without a Microsoft 365 Copilot license

User	Activity count
Tom Hanks	1817
Abigail Fisher	1495
Allison Johnson	1479
Evie Trang	901
Sarah Jenkins	103

### Most accessed sensitive files

by agent access count

File name	Agent access
Market_Expansion_Feasibility_Study.d...	1505
FY26_Operational_Budget_Draft.xlsx	1472
Board_Review_Product_Roadmap_Fin...	1407
legal-tenure.pdf	1362
Competitor_Analysis_Global_Logistics...	1331

### Agents accessing sensitive files

by file access count

Agent name	Files accessed
<b>HR Agent</b>	452
<b>Knowledge Base Assistant</b>	395
<b>Data Retention Advisor</b>	193
<b>Slack Summary Agent</b>	193
<b>Pipeline Coverage Agent</b>	152

Be aware of critical Agent security and governance considerations such as which agents are accessing sensitive files, and which agent users are incurring the most pay-as-you-go activity consumption.

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# Establish a Robust Data Foundation for AI

**01**

**ENSURE**

trusted data quality

**02**

**INTEGRATE**

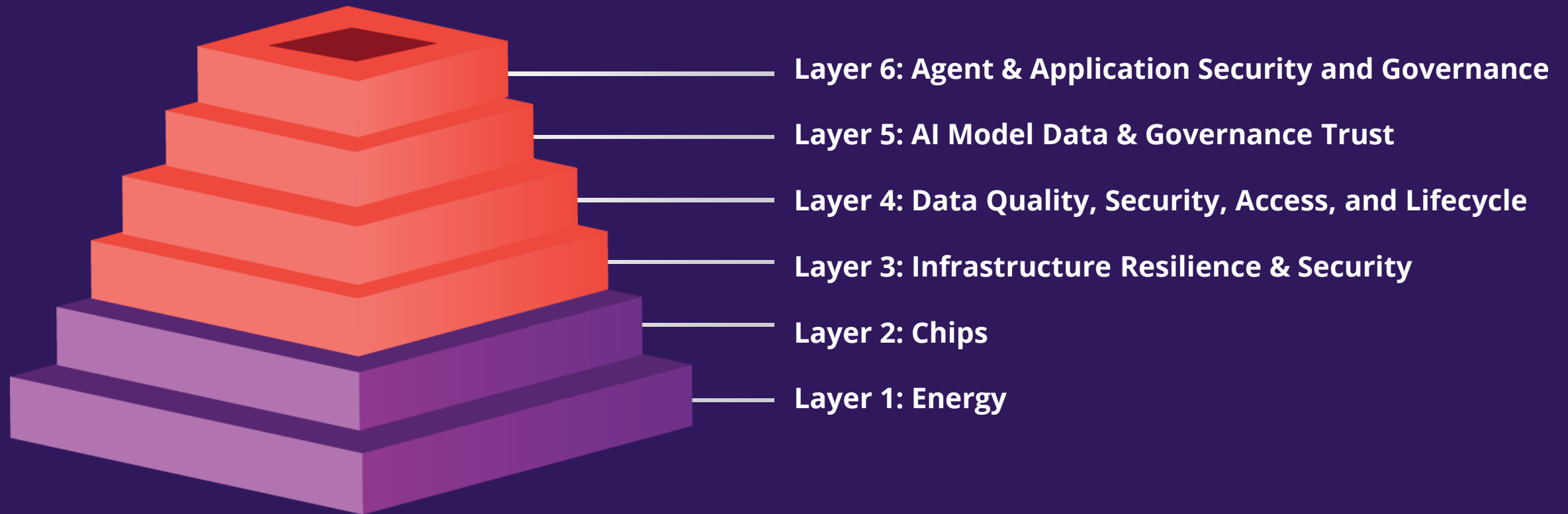
proactive data security

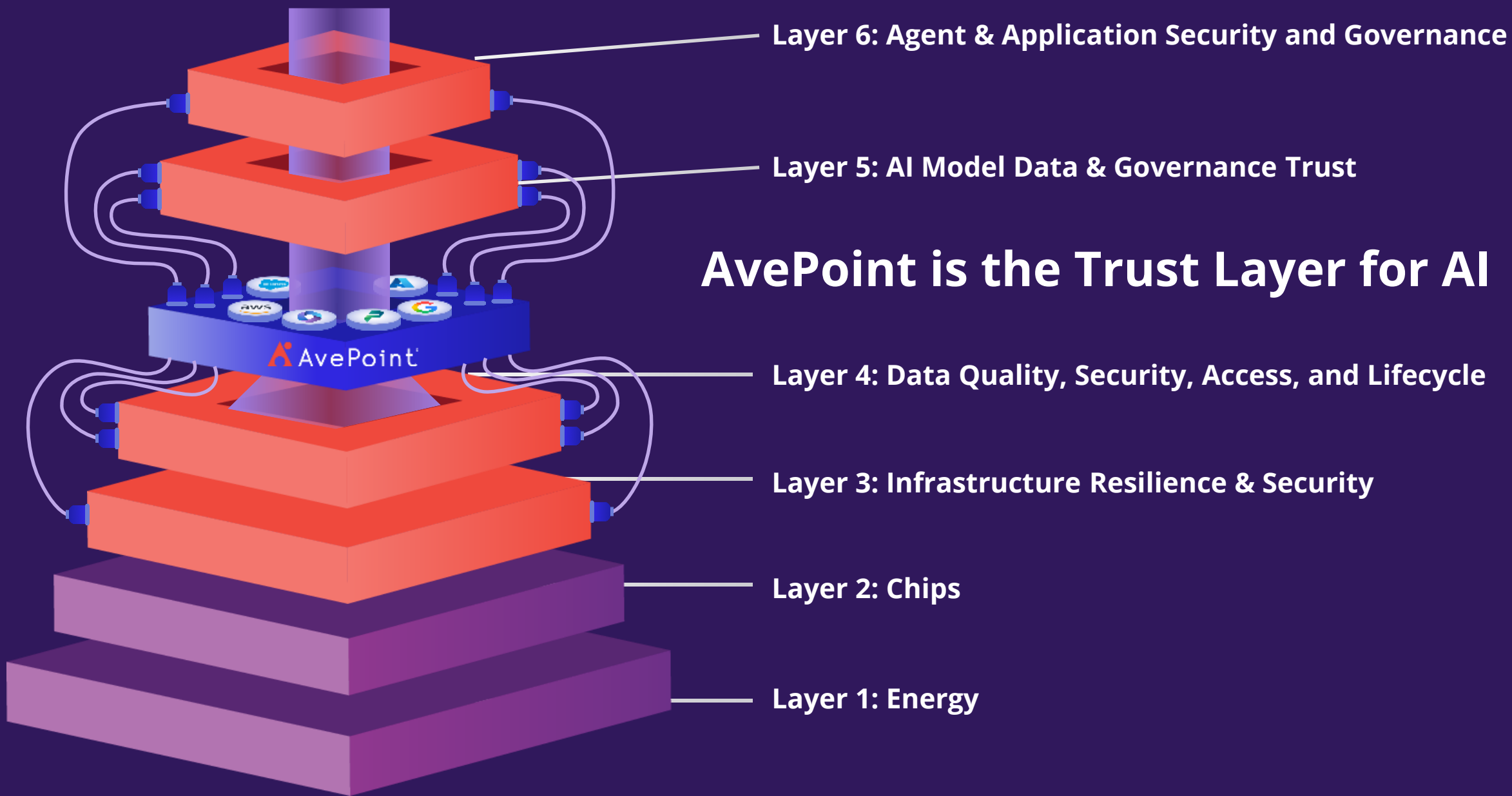
**03**

**SCALE**

automated governance

# Trust is the New Currency





# Connected Challenges One Platform



Legacy & Fragmented Data  
Overexposed Data  
Data Loss & Interruption  
Digital Sprawl

## COMPLETE DATA PROTECTION

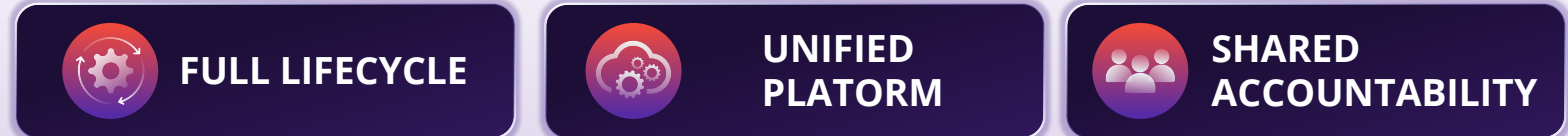
SECURITY + GOVERNANCE + RESILIENCE

### PLATFORM CAPABILITIES



## AVEPOINT CONFIDENCE PLATFORM

Robust shared capabilities for solving inter-related data protection challenges, across Clouds





**Thank You**



# APPENDIX

# GAAP to Non-GAAP Reconciliation

	2022	2023	2024	2025
(\$ in mm)	For the Twelve Months Ended December 31			
GAAP gross profit	\$166.1	\$194.4	\$248.0	\$310.7
<i>GAAP gross margin</i>	71.5%	71.5%	75.0%	74.1%
Stock-based compensation expense & amortization of acquired intangible assets	\$3.3	\$4.1	\$2.3	\$2.9
Non-GAAP gross profit	\$169.3	\$198.5	\$250.2	\$313.6
<i>Non-GAAP gross margin</i>	72.9%	73.0%	75.7%	74.8%
GAAP operating expenses	\$207.1	\$209.7	\$240.8	\$277.7
Stock-based compensation expense & amortization of acquired intangible assets	\$34.9	\$33.4	\$38.2	\$38.3
Secondary listing costs and discontinuation of growth equity fund	\$0.0	\$0.0	\$0.0	\$4.9
Non-GAAP operating expenses	\$172.2	\$176.3	\$202.6	\$234.5
<i>Non-GAAP operating expense as % of revenue</i>	74.1%	64.9%	61.3%	55.9%
GAAP operating income (loss)	(\$41.1)	(\$15.4)	\$7.2	\$33.0
Stock-based compensation expense & amortization of acquired intangible assets	\$38.2	\$37.5	\$40.5	\$41.3
Secondary listing costs and discontinuation of growth equity fund	\$0.0	\$0.0	\$0.0	\$4.9
Non-GAAP operating income (loss)	(\$2.9)	\$22.2	\$47.6	\$79.2
<i>Non-GAAP operating margin</i>	(1.2%)	8.1%	14.4%	18.9%



# Key Balance Sheet Items and Free Cash Flow

	2022	2023	2024	2025
(\$ in mm)	As of December 31			
Cash and cash equivalents	227.2	223.2	290.7	481.1
Accounts receivable	66.5	85.9	87.4	124.5
Prepaid expenses and other current assets	10.0	12.8	16.5	19.7
Property and equipment	5.5	5.1	5.3	6.0
Goodwill	18.9	19.2	17.7	38.0
Intangible assets	11.1	10.5	8.9	12.1
Other assets	76.3	85.9	92.6	107.8
<b>Total assets</b>	<b>415.5</b>	<b>442.6</b>	<b>519.1</b>	<b>789.2</b>
Accounts payable	1.5	1.4	2.4	3.8
Accrued expenses and other current liabilities	47.8	53.8	76.1	84.2
Current portion of deferred revenue	93.4	121.5	144.5	185.7
Long-term portion of deferred revenue	8.1	7.7	8.8	15.3
Other liabilities	21.6	33.3	16.3	21.5
<b>Total liabilities</b>	<b>172.4</b>	<b>217.7</b>	<b>248.1</b>	<b>310.5</b>
Mezzanine equity	14.0	6.0	0.0	0.0
Stockholders' equity	229.1	218.8	270.9	478.7
<b>Total liabilities, mezzanine equity, and stockholders' equity</b>	<b>415.5</b>	<b>442.6</b>	<b>519.1</b>	<b>789.2</b>
	For the Twelve Months Ended December 31			
Net cash provided by (used in) operating activities	(0.8)	34.7	88.9	85.3
Purchase of property and equipment	(3.9)	(2.1)	(3.0)	(3.7)
<b>Free cash flow</b>	<b>(4.6)</b>	<b>32.6</b>	<b>85.9</b>	<b>81.6</b>

# Historical Customer Metrics

CUSTOMER COUNT	2022	2023	2024	2025
Total Customers	17,085	21,214	25,178	28,604

RETENTION RATES	2022	2023	2024	2025
Gross Retention Rate	86%	86%	88%	88%
Gross Retention Rate (FX Adjusted)	87%	87%	89%	88%
Net Retention Rate	103%	108%	110%	111%
Net Retention Rate (FX Adjusted)	107%	109%	111%	110%

LARGE CUSTOMER COUNT	2022	2023	2024	2025
Customers > \$100K ARR	455	547	666	826
Customers > \$250K ARR	137	178	225	298
Customers > \$500K ARR	40	53	81	102
Customers > \$1M ARR	12	18	26	31



# ARR Composition

		2022	2023	2024	2025
<b>Direct vs. Channel</b>	Direct	53%	49%	45%	43%
	Channel	47%	51%	55%	57%
<b>Customer Segment</b>	Enterprise	51%	52%	53%	52%
	Mid-Market	30%	29%	28%	28%
	Small Business	19%	18%	19%	20%
<b>New vs. Existing</b>	New Customers	58%	50%	32%	37%
	Existing Customers	42%	50%	68%	63%
<b>Geography</b>	North America	45%	45%	44%	42%
	EMEA	35%	35%	35%	36%
	APAC	20%	20%	21%	22%
<b>Product Suite</b>	Control	27%	27%	28%	26%
	Modernization	15%	12%	11%	12%
	Resilience	58%	61%	62%	62%

*New/existing percentages are applicable to incremental ARR.*





**Thank You**

	Backup Recovery Archiving	Cloud Data Loss and Prevention	Access, Governance, Compliance	Data Transformation	Data Management Software	Analytics	Multi-Tenant Management (MSP)
<b>AvePoint</b>	✓	✓	✓	✓	✓	✓	✓
Acronis	✓	✓	✓				
Commvault	✓		✓				
Datto	✓						
Druva	✓		✓				
NetApp	✓		✓	✓	✓	✓	
Quest	✓		✓	✓	✓	✓	
Rubrik	✓				✓		
Varonis		✓	✓	✓	✓	✓	
Veeam	✓	✓	✓			✓	
Veritas	✓	✓	✓		✓	✓	

