



Data Hygiene by Design

Purview Data Lifecycle Management/Records Management (DLM/RM)
for AI-Ready Content

Prepared for the International Data Security UG on January 20, 2026, by Joanne C Klein

Synopsis

If you want better Copilot results, lower risk, and less ROT in your environment, this session is for you. Joanne will break down how to operationalize Microsoft Purview Data Lifecycle Management and Records Management to create clean, governed, AI-ready content — without adding friction for users.

What to expect:

- Practical ways to delete what you can and retain what you must
- Simplifying retention into a manageable Purview File Plan
- Default labels and auto-policies that scale across M365
- Design decisions that set you up for long-term success

Plus, a powerful demo showing Copilot before and after data hygiene controls — and why this matters to both IT and the business.



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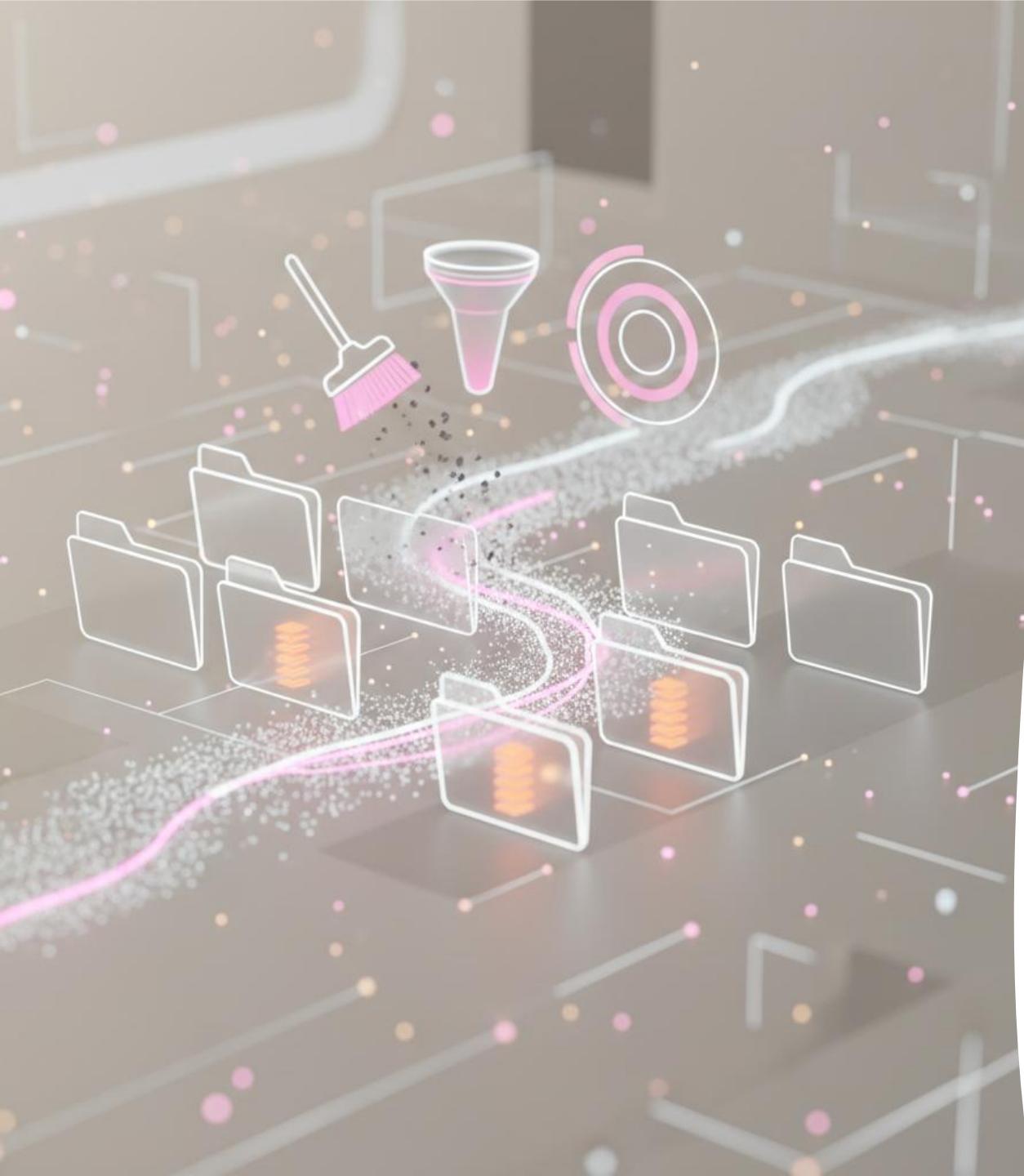
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Microsoft Partner

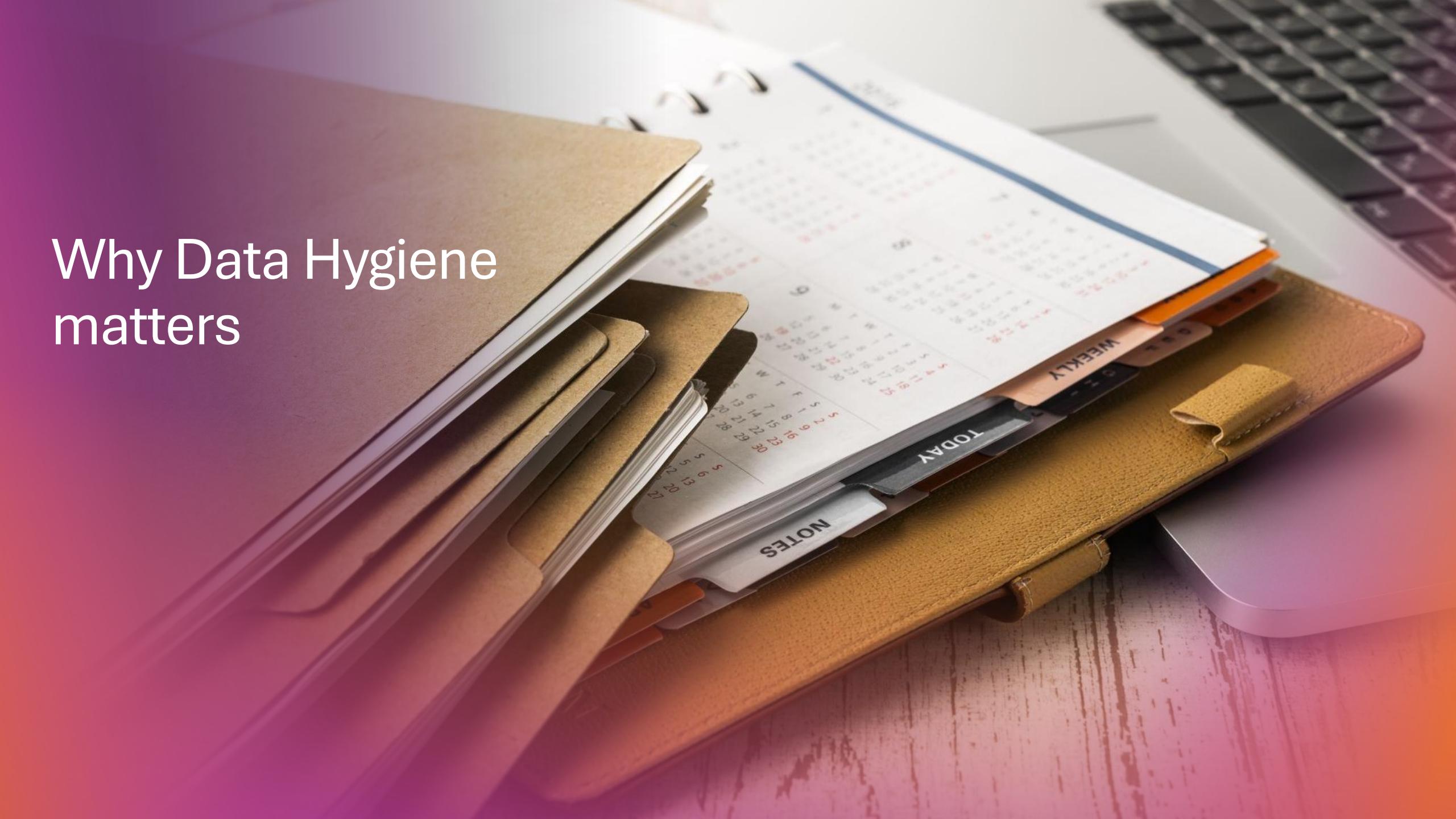
SharePoint & Microsoft Purview consultant



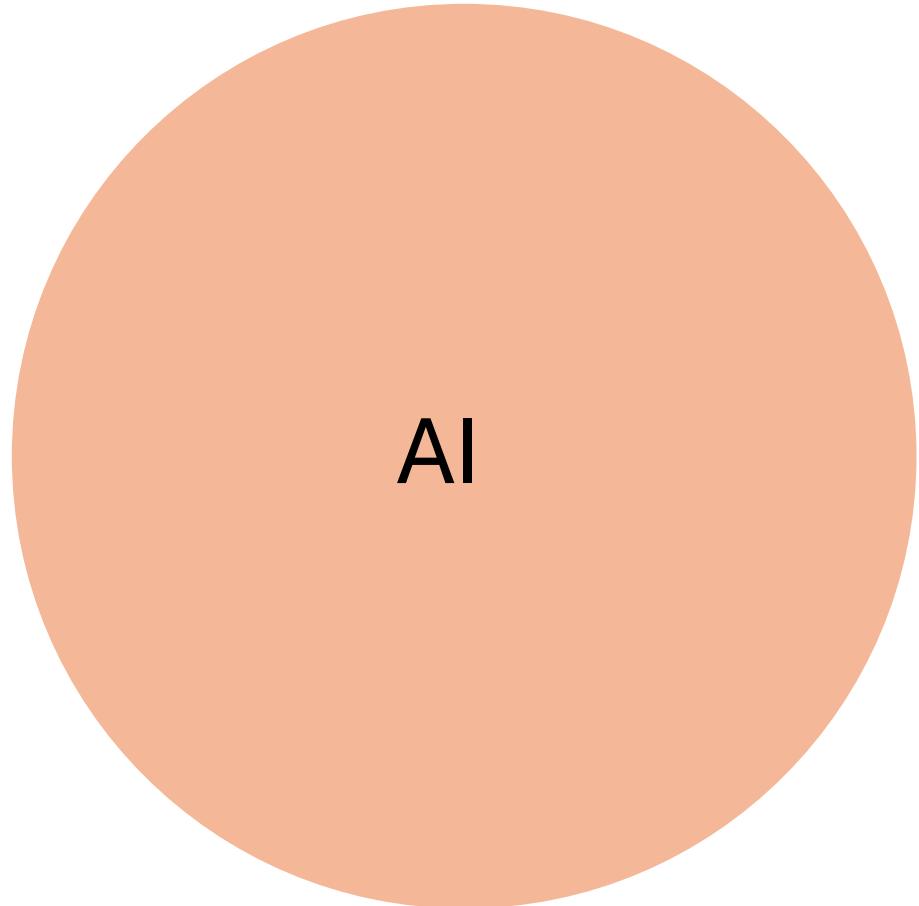
Agenda

- Why Data Hygiene Matters
- Where DLM/RM fits into the Purview timeline
- Mapping Retention into a Purview File Plan
- Automation and Architectural Choices
- Demo: Data Hygiene impacts

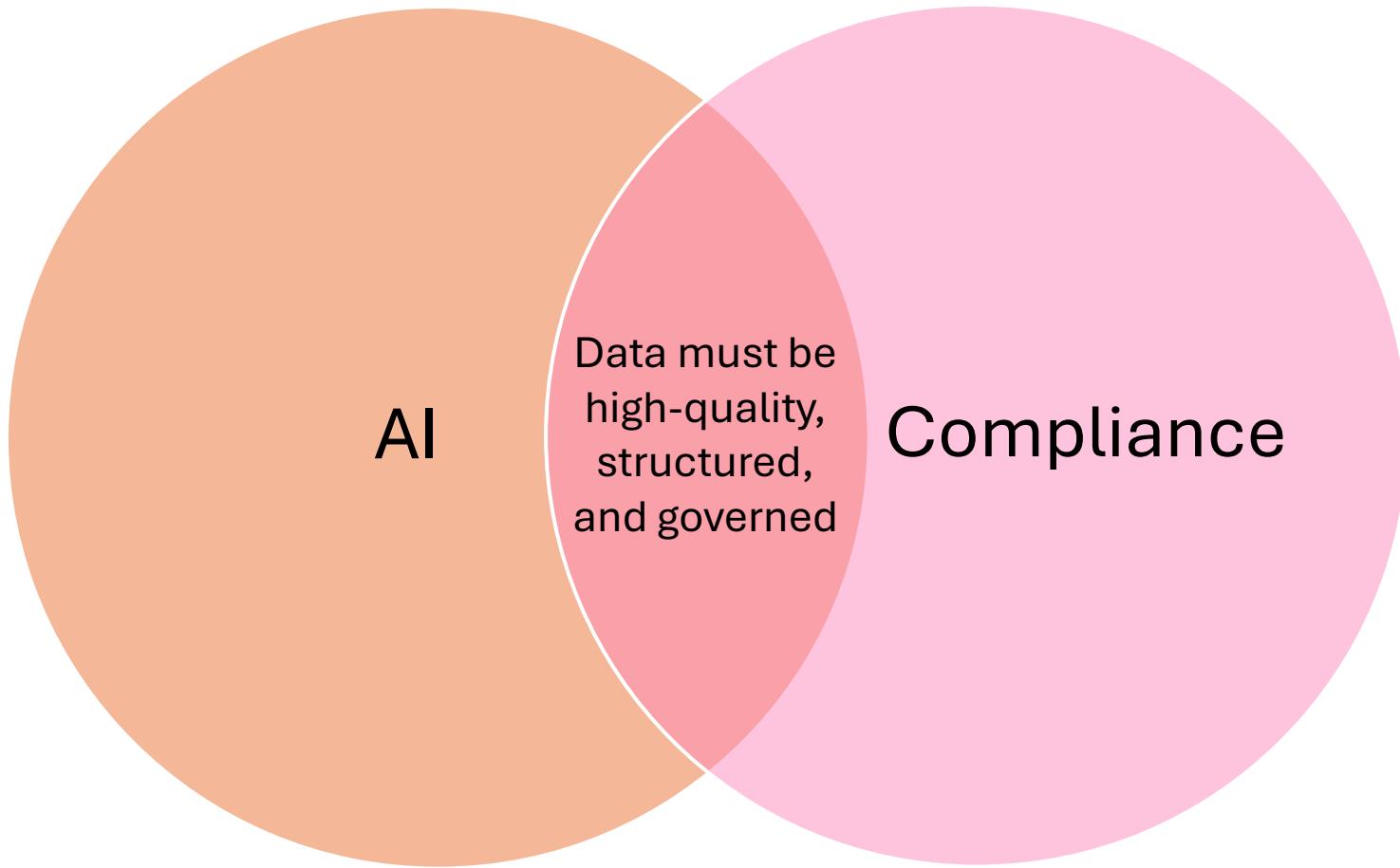
Why Data Hygiene matters



Different Worlds, Shared Needs



Different Worlds, Shared Needs





Importance of clean, governed data

- Adhering to Regulatory Obligations
 - Hygiene ensures retention and disposition rules are enforced, **reducing audit findings and penalties.**
- With it: Improved Signal Quality for AI (and search)
 - Well-classified, current data enables AI tools to **deliver accurate, trustworthy outputs.**
- Without it: Garbage In... Garbage Amplified
 - Poor-quality or redundant data gets surfaced and magnified by AI and search, leading to **misleading insights and compliance risk.**
- One of the biggest reasons for “garbage”?

ROT... what is it and why should you care

	Redundant	Obsolete	Trivial
E x a m p l e s	<p>Multiple copies of the same project plan saved in same/different folders:</p> <ul style="list-style-type: none">• ProjectPlan_Final.docx• ProjectPlan_Final_v2.docx• ProjectPlan_Final_Joanne.docx).	<ul style="list-style-type: none">• A 2020 product roadmap for a service that was retired in 2023.• An outdated HR Benefits policy that has since been replaced with an updated version	<ul style="list-style-type: none">• Draft changes saved temporarily• Personal notes• Office party photos• Temporary/working notes• “fun memes” uploaded to a team site
?	<p>Adds confusion; consumes storage without adding value.</p>	<p>May still be historically important, but it is no longer relevant to current operations or decision-making.</p>	<p>Doesn't support business objectives and clutters search results.</p>



Why Reducing ROT Matters to the Business

Cleaning ROT isn't just storage hygiene; it's also reduced risk, regulatory compliance, and improved AI readiness.

ROT directly impacts cost, risk, and decision quality.

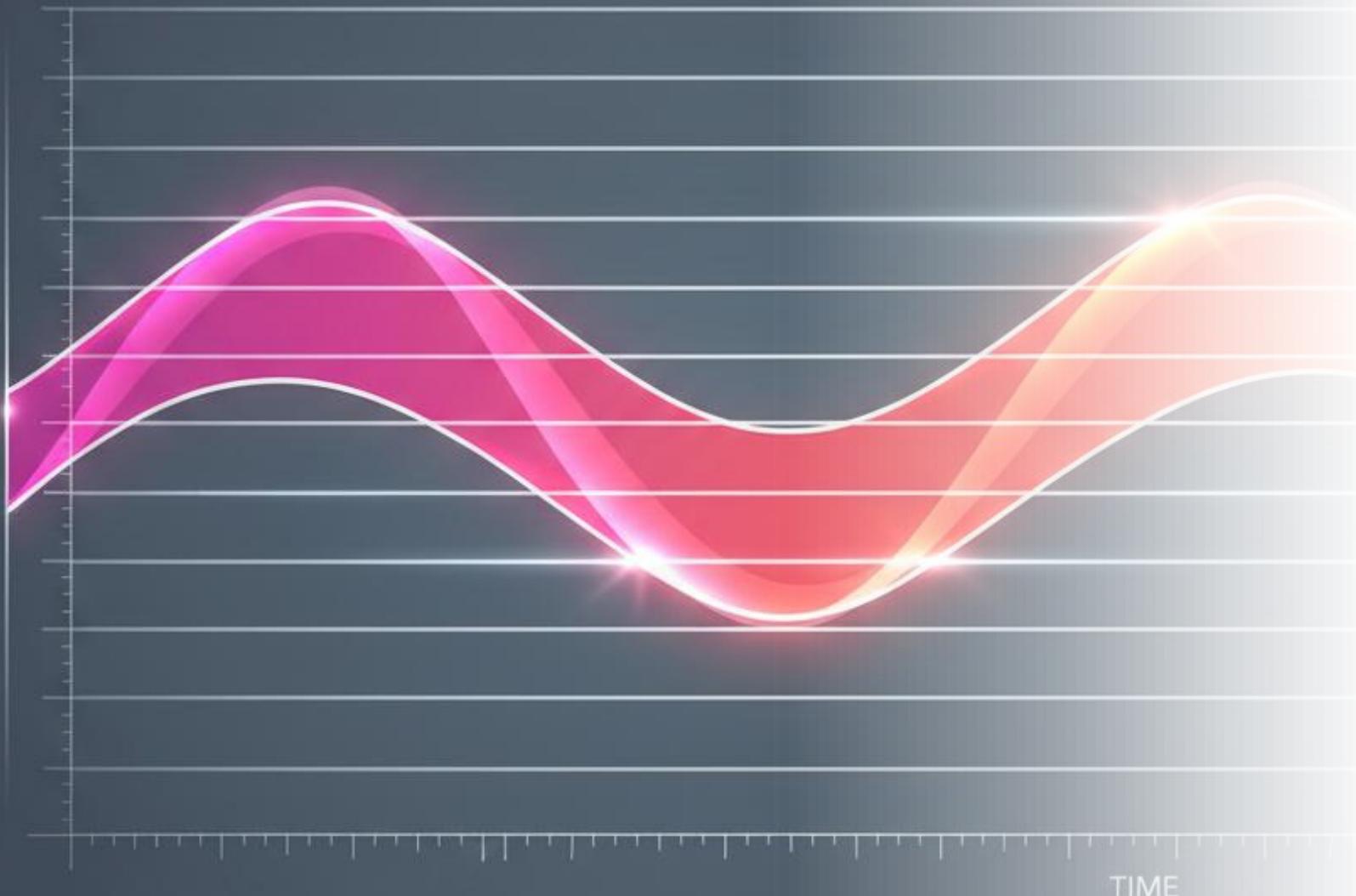


Quantifying the benefits of Data Hygiene to Executives

- Breach Reduction Impact
- Reduced Legal and Compliance Exposure
- Improved AI and Business Insights



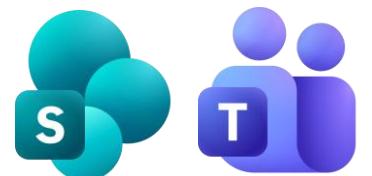
WORKSTREAMS



Purview Timeline for DLM/RM

Key Drivers for the Purview DLM/RM Timeline

- While AI has heightened the urgency to act, sustainable success in DLM/RM still depends on **strong, consistent data governance**.
- DLM/RM succeeds only with **clear, authoritative policies** shaped collaboratively by legal, privacy, records, and business teams — an essential process that takes time. These policies need real authority and meaningful enforcement behind them, so employees feel supported—not exposed—when making decisions concerning retention and deletion
- A clear **understanding of your data is essential** to help inform the Purview controls you need to place on them. From my experience, most organizations start with Data Loss Prevention, Information Protection, and Insider Risk Management long before fully tackling DLM and RM in a meaningful way.
- Your SharePoint and Teams **governance and information architecture is critical** for automating retention, which is why many DLM/RM projects often also become re-architecture and cleanup efforts! **I do not see this same level of dependency for most other Purview solutions.**





Real-world challenges
I see when deploying
DLM/RM...

Challenge #1: Over-retaining

Taking the “Retain everything until we get it figured out” approach...

Many organizations use retention policies with **only** a retain action (or eDiscovery holds) as a “stop gap” measure to ensure nothing is deleted until a more strategic plan can be built and put in place for retention and deletion of content.

- Quick and easy, but it merely defers the problem and introduces more challenges over time.

Risks...

- Larger data footprint if a data breach
- AI results will be low quality due to poor data hygiene
- Users will likely struggle to find what they need (both clickers and searchers)
- Old or unused SharePoint/Teams sites can't be cleaned up
- You can't take advantage of SharePoint's version history cleanup
- eDiscovery time significantly increased
- Risk of hitting your SharePoint storage quota

Challenge #2: The Complexity of Retention Label Granularity

Retention labels require a different mindset than Sensitivity labels

Sensitivity Label	VS	Retention Label
All contracts should have a confidential sensitivity label.		Retention of contracts depends on the type of contract: <ul style="list-style-type: none">• Vendor contracts: 5 years past end of contract• Contractor contracts: 3 years past end of contract• Sales contract: 2 years past contract start date
Any file with a CCN should have a highly confidential sensitivity label.		A CCN alone does not determine the retention requirements. All these documents can have a CCN: <ul style="list-style-type: none">• Expense reports: Retain for 2 years• Invoices: Retain for 7 years• Order confirmation: Retain for 1 year past delivery
Any file with PII should have a confidential sensitivity label.		Anything with PII should have a retention label applied unless it is currently required for transacting business with the customer.

Challenge #3: No/Poor SharePoint/Teams Governance

Taking the “wild west” approach

The level of governance you have across SharePoint/Teams will have a direct impact on the complexity and effort required to implement DLM/RM across those locations.

Things that are challenging to implement DLM/RM against...

- Lift and shift migrations
- Large libraries that hold disparate, active, content
- Lack of record stewardship assigned in SP/Teams
- Out-of-the-box provisioning (no additional approval nor controls)

Challenge #4: Human Resourcing

Both for the Project Team and the Operational Team



Project Team

Compliance partners
Records Managers
SharePoint and Teams team
Exchange team
Information Technology team
Business users' reps



Operational Team

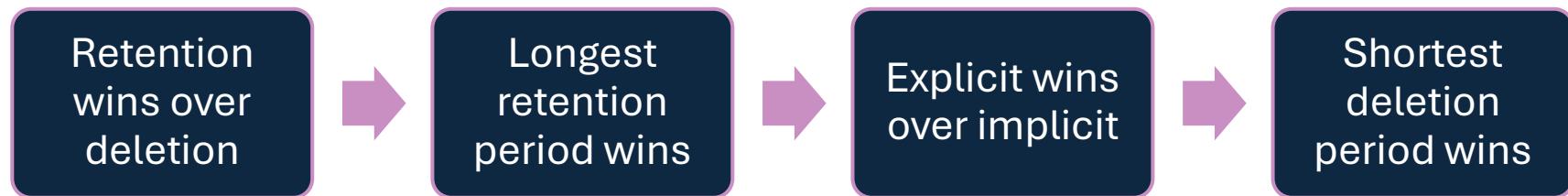
Compliance officer
Purview Administrator
Records Manager
Record Owners
Record Stewards*
Business Users

Mapping a Retention Schedule into Retention Policies and a Purview File Plan

Bugs
Contracts
Meeting transcripts
Resumes
Vendor Agreements
Financial report
Permanent
Legal Case file

BOTH Retention Policies AND Retention Labels are needed

- If you are using a **retain forever** retention policy, ask yourself why:
 - Is it for legal reasons? Use a targeted eDiscovery hold for the location instead.
 - Are you using it like a backup? This is not a backup mechanism.
- Moving from a retention policy that **only retains** to one that has a **delete action** is recommended in most cases
- Retention policies with a delete action can address ROT cleanup in M365 workloads but should **only be done jointly with the application of retention labels**. The principles of retention will determine which one will win for any given file/email.



- Having **both** retention policies and labels in place will ensure your organization is retaining records of value for legal, historical, or regulatory reasons while deleting everything else (in a reasonable time frame) for sustainable data hygiene.

Mapping retention schedules into a Purview File Plan

3 Retention Schedule Excerpts

1

Government of Nova Scotia
STAR: Standard for Administrative Records
Version 6.1

Financial Management

3050 Accounts Reporting and Reconciliation 3050

Records documenting accounts reporting and reconciliation. Used for verifying and reporting the expenditure and receipt of funds and the management of accounts. Includes summary documents used to verify financial transactions, reconciliation records, and statements of assets and liabilities. Examples: account balances, monthly account summaries, statements.

3050 Accounts Reporting and Reconciliation	ACT	SA	DIS
01 General	FY + 1	0	D
20 Accounts Reporting and Reconciliation Subject Files	SO + 0	0	D
30 Statement of Accounts Case Files	FY + 1	0	D
32 Statement of Accounts by Agency Case Files	FY + 1	6	D
45 Audit Preparation Case Files	FY + 1	6	D
50 Accounts Reconciliation Case Files	FY + 1	0	D
52 Accounts Reconciliation by Agency Case Files	FY + 1	6	D

SO Definitions: - 20 no longer required

2

RECORD CATEGORY	DESCRIPTION	RETENTION YEARS
ACCOUNTING	Records supporting financial transactions and budgets.	FY+10
SubCategories		
Accounts Payable	MO Citation GS0007	Record Owner Finance
Accounts Receivable	GS008	Finance
Banking	GS010	Finance
Budget Preparation	GS004	Finance
Travel Expense Reimbursement	GS070	Finance
Unclaimed Property	GS087	Finance

3

CONTRACTS AND AGREEMENTS – TRANSACTIONS

Documents relating to contracts and agreements that are entered into as part of a transaction: acquisition (including title and long leases), financing, development, disposition, formation of a partnership and investment fund participation.

	Retention	Final disposition
Main copy	888 ⁽¹⁾ + 10 years	Destruction of preparatory and supporting documents.
Record owner : Legal Affairs		Permanent retention of final documents, documents necessary to understand the file, and/or documents that provide evidence of rights, privileges or obligations.

⁽¹⁾ As long as the Company has an interest in the investment or in the subject of the transaction.
⁽²⁾ As long as useful for reference purposes, without exceeding the main copy retention period.

CONTRACTS AND AGREEMENTS – CONFIDENTIALITY AGREEMENTS

Documents relating to confidentiality agreements signed by the Company.

	Retention	Final disposition
Main copy	888 ⁽¹⁾ + 7 years	Destruction
Record owner : Legal Affairs		

⁽¹⁾ End of agreement.
⁽²⁾ As long as useful for reference purposes, without exceeding the main copy retention period.

CONTRACTS AND AGREEMENTS – GOODS AND SERVICES

Documents relating to contracts that are not concluded in the context of an investment.

	Retention	Final disposition
Main copy	888 ⁽¹⁾ + 10 years*	Destruction
Record owner: Multiple	*Exceptions : British-Columbia, Ontario, Nova Scotia: 888 ⁽¹⁾ + 15 years Manitoba : 888 ⁽¹⁾ + 30 years	

⁽¹⁾ End of agreement.
⁽²⁾ As long as useful for reference purposes, without exceeding the main copy retention period.

Mapping Retention Schedules into a Purview File Plan

My Recommendations

“When it comes to Purview file plans, simpler and smaller is **ALWAYS** better.

Although you may not be able to ever get to a small or simple file plan, doing what you can to simplify what you have is always a pragmatic approach and my recommendation.”

-Joanne C Klein

Why is a “simpler and smaller” file plan better?

- Easier to maintain from an admin perspective
- Easier to understand and train for end-users
- Will likely result in being more compliant at scale

How is this done? Assemble all retention schedules and taking a risk-based approach, follow these 3 steps in the mapping process:

Rationalize every record series for Purview



Simplify as much as possible



Consolidate record series whenever you can

Creating Retention Labels With a (1-time) File Plan Import...

	LabelName	Comment	IsRecordLabel	RetentionAction	RetentionDuration	RetentionType	ReviewerEmail	Reference	Department	Name	Category	SubCategory	AuthorityType
1	Access Requests and Approvals	Retention label for managing access requests and approvals.	FALSE	KeepAndDelete	2555	ModificationAgeInDays	admin@M365x13667106.onmicrosoft.com	RID 0001	Information Tech	Approvals	Business		
3	Administrative Convenience Copy	A default label for all of Content.	FALSE	KeepAndDelete	730	ModificationAgeInDays		RID 0002	Corporate	Administration	Business		
4	Board Record	This document is an approved Board Record.	TRUE	Keep	Unlimited	TaggedAgeInDays		RID 0003	Board	Administration	Regulatory		
5	Corporate Enterprise Document	This labels the document as a Corporate Enterprise Document.	FALSE	KeepAndDelete	2190	TaggedAgeInDays	admin@M365x13667106.onmicrosoft.com	RID 0004	Corporate	Policies and Procedures	Regulatory		
6	Corporate Form	This labels the document as a Corporate Form.	FALSE	KeepAndDelete	3650	TaggedAgeInDays		RID 0005	Corporate	Policies and Procedures	Regulatory		
7	Corporate Lending Document	This labels the document as a Corporate Lending Document.	FALSE	KeepAndDelete	14600	TaggedAgeInDays	admin@M365x13667106.onmicrosoft.com	RID 0006	Corporate	Policies and Procedures	Regulatory		
8	External Reference Material	Label to be used for content that is not a record.	FALSE	KeepAndDelete	1825	ModificationAgeInDays	admin@M365x13667106.onmicrosoft.com	RID 0007	Corporate	Reference Material	Business		
9	Financial Record	Label for all Financial Records.	TRUE	KeepAndDelete	2555	TaggedAgeInDays	admin@M365x13667106.onmicrosoft.com	RID 0008	Finance	Financial Statement	Regulatory		
10	Permanent	This means the content it is a permanent record.	TRUE	Keep	Unlimited	TaggedAgeInDays		RID 0009	Corporate	Compliance	Regulatory		
11	Security Agreement	Agreement between customers.	FALSE	KeepAndDelete	2555	ModificationAgeInDays	admin@M365x13667106.onmicrosoft.com	RID 0010	Information Tech	Approvals	Business		
12	Contract	Contoso contract.	FALSE	KeepAndDelete	20	EventAgeInDays	admin@M365x13667106.onmicrosoft.com	RID 0011	Corporate	Administration	Legal		
13	Lease	Contoso Lease agreement.	FALSE	KeepAndDelete	20	EventAgeInDays	admin@M365x13667106.onmicrosoft.com	RID 0012	Finance	Financial Statement	Legal		
14													

Warnings:

- ➡ means this value cannot change once you've added the label. Plan accordingly!
- Do not use the file plan import process for changing retention label configurations AFTER the label is in a label policy and applied to content since it allows for more changes than what are supported by Microsoft. In most cases, use the Purview UI for ongoing changes. (some exceptions)

A Purview File Plan example

Microsoft Purview

Search

Copilot

Home

Solutions

Agents

Learn

Records Management

Overview

File plan

Policies

Label policies

Policy lookup

Events

Disposition

Classifiers

Explorers

Access Requests and Approvals

Administrative Convenience Copy

Board Record

Contract

Corporate Enterprise Document

Corporate Form

Corporate Lending Document

External Reference Material

Financial Record

Lease

Permanent

Security Agreement

File plan

Take advantage of a more flexible and comprehensive way to manage your business-critical data. Our file plan lets you apply item-level retention settings, import or export templates of your content management plan, define whatever label settings meet your needs, review detailed label analytics, and more. [Learn about using a file plan](#)

+ Create a label Publish labels Import Export Refresh

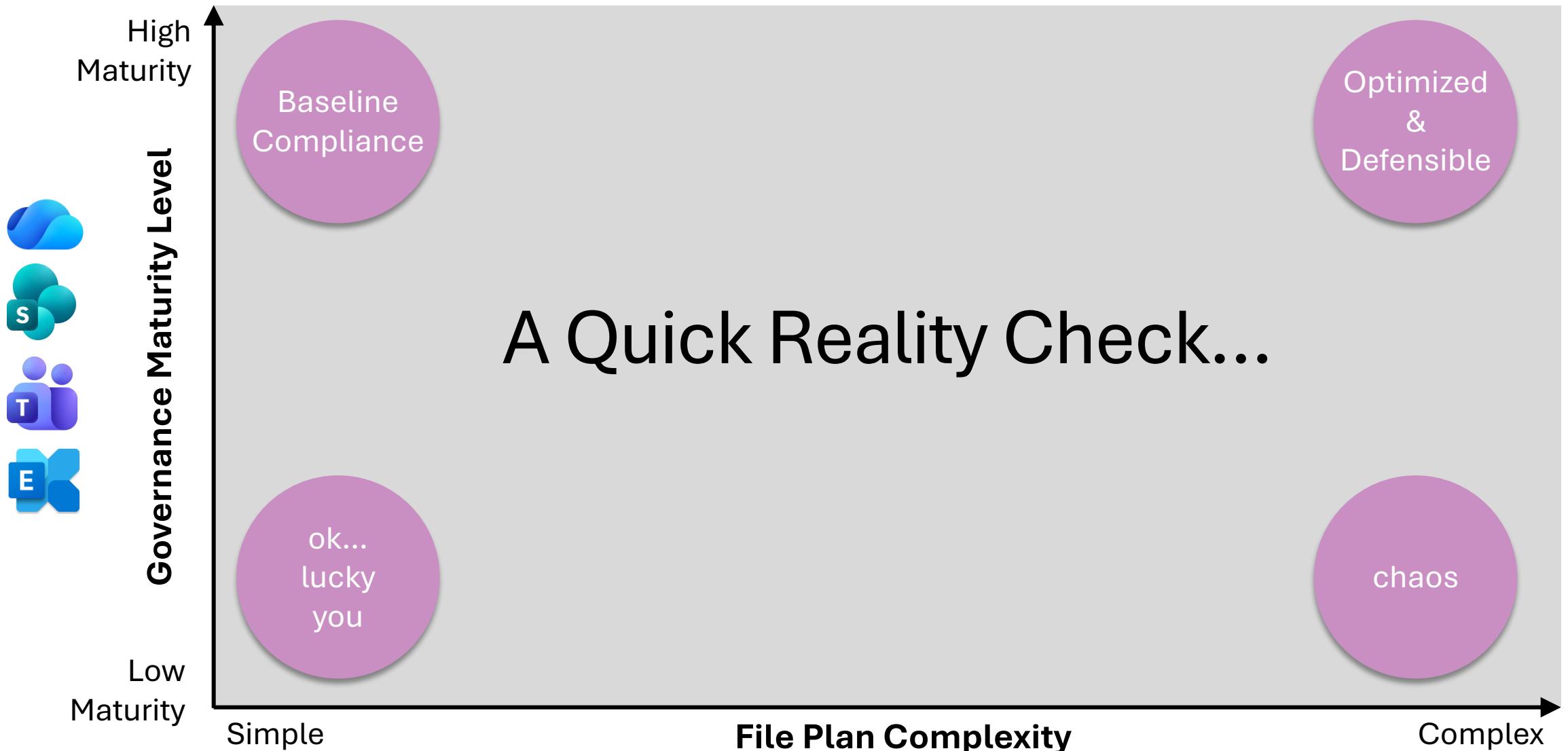
12 items Search Group by Customize columns

Name	Status	Based on	Is record	Retention duration	Disposition type	Reference ID	Function/department	Category
Access Requests and Approvals	Inactive	Last modified	No	1 month	Review required	RID-001	Information Technology	Approvals
Administrative Convenience Copy	Inactive	Last modified	No	2 years	Auto-delete	RID-002	Corporate	Administration
Board Record	Inactive	Label applied	Yes	Forever	No action	RID-003	Board	Administration
Contract	Inactive	Event	No	20 days	Review required	RID-011	Corporate	Administration
Corporate Enterprise Document	Inactive	Label applied	No	10 days	Review required	RID-004	Corporate	Policies and Procedures
Corporate Form	Inactive	Label applied	No	10 years	Auto-delete	RID-005	Corporate	Policies and Procedures
Corporate Lending Document	Inactive	Label applied	No	10 years	Review required	RID-006	Corporate	Policies and Procedures
External Reference Material	Inactive	Last modified	No	15 days	Review required	RID-007	Corporate	Reference Material
Financial Record	Inactive	Label applied	Yes	7 days	Review required	RID-008	Finance	Financial Statements
Lease	Inactive	Event	No	20 days	Review required	RID-012	Finance	Financial Statements
Permanent	Inactive	Label applied	Yes	Forever	No action	RID-009	Corporate	Compliance
Security Agreement	Inactive	Last modified	No	10 days	Review required	RID-010	Information Technology	Approvals

How do we apply these granular retention labels to content across our tenant in an intelligent, scalable way to improve our data hygiene?

AUTOMATION & INTELLIGENCE
TAMING YOUR UNSTRUCTURED CONTENT

Automating Data Hygiene



Purview DLM/RM **loves** tenant-level consistency

Examples...

- Well-managed Entra Id attributes on user objects
 - Use in User Adaptive scopes to target user segments (Execs, Sales team, etc.)
- Container (SharePoint/Teams) provisioning standards
 - Apply site properties or group attributes during provisioning to use in Adaptive Scopes
 - Apply any SharePoint IA components to help with automation such as...
- Tenant-level content types and site columns (created in SP Admin Center) and then applied to files across your SharePoint data estate
- SharePoint managed metadata site columns that use the tenant-level term store for applying consistent terms across tenant

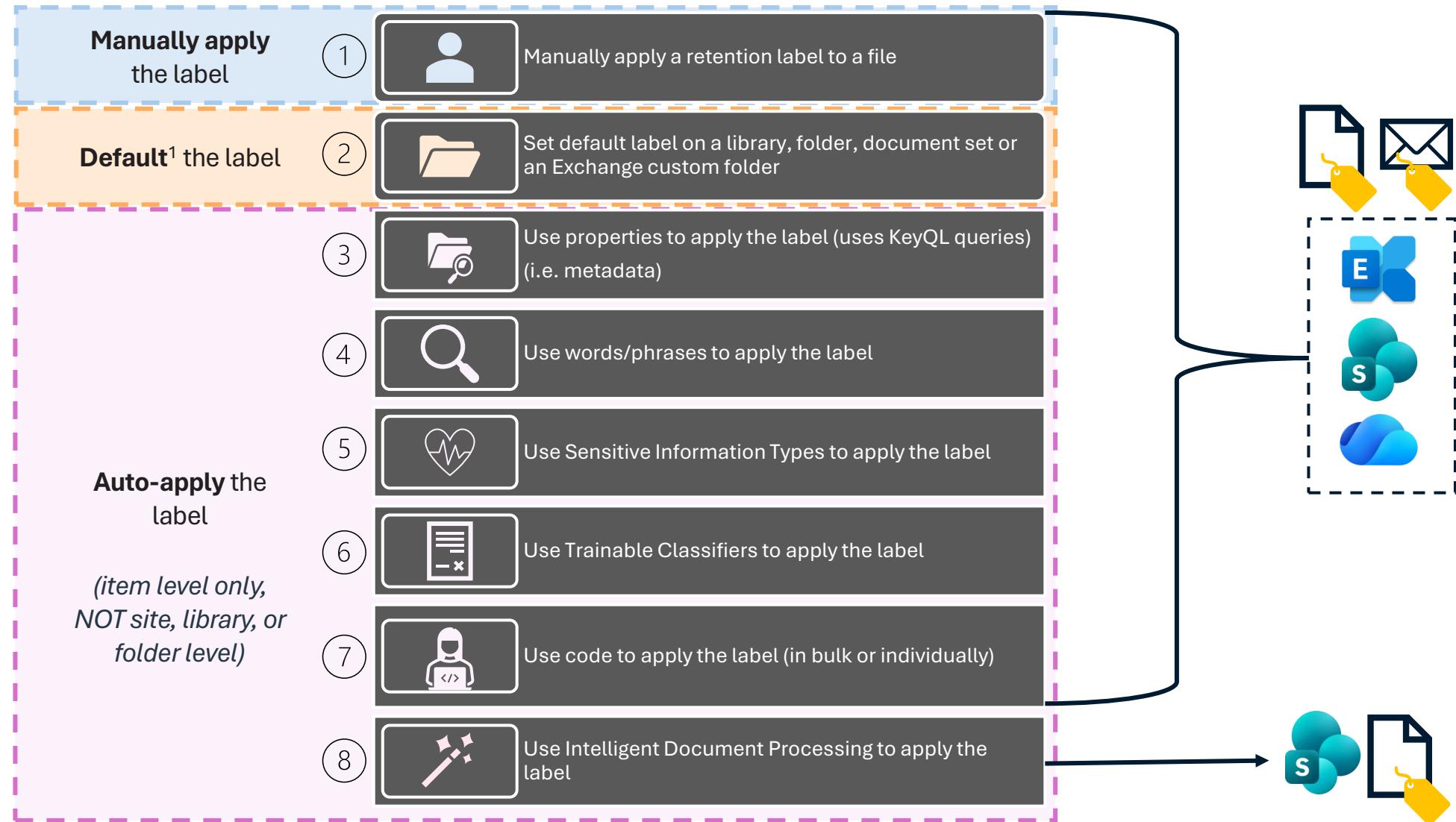


Did you know... SharePoint Knowledge Agent autofill columns currently creates list columns with no standardized name and structure; not standardized site columns with consistent names ☺ (Purview is only scalable with standardized structures)



Applying a retention label to your content

¹Although defaulting retention labels is a reasonable strategy, dealing with the exceptions is challenging



Example: Default label on CAB Committees library

SharePoint

Search this library

Finance Demo Hub Our Teams

FT Finance Team B

Private group | Confidential ★ Following 1 member

Home Conversations Documents Notebook Pages CAB Committees Site contents Recycle bin Edit

CAB Committees

All Documents DEMO Organization Document + Add view

AI actions Add shortcut to OneDrive Forms Classify and extract ... + Create or upload

Details

Name CalendarYear Retention label Label applied by Retention label Applied Label Event Date + Add column

CalendarYear: 2023 (6)

	Sample document 4.docx	2023	DEMO – CAB Committees	Joanne Klein	1/9/2025 7:04 AM
	Sample document 5.docx	2023	DEMO – CAB Committees	Joanne Klein	1/9/2025 7:04 AM
	Sample document 6.docx	2023	DEMO – CAB Committees	Joanne Klein	1/9/2025 7:04 AM
	Sample document 7.docx	2023	DEMO – CAB Committees	Joanne Klein	1/9/2025 7:04 AM
	Sample document 8.docx	2023	DEMO – CAB Committees	Joanne Klein	1/9/2025 7:04 AM
	Sample document 9.docx	2023	DEMO – CAB Committees	Joanne Klein	1/9/2025 7:04 AM

CalendarYear: 2024 (4)

	Sample contract 1.pdf	2024	DEMO – CAB Committees	Joanne Klein	1/9/2025 7:04 AM
	Sample contract 2.docx	2024	DEMO – CAB Committees	Joanne Klein	1/9/2025 7:04 AM
	Sample contract 2.pdf	2024	DEMO – CAB Committees	Joanne Klein	1/9/2025 7:04 AM
	Sample contract 3.docx	2024	DEMO – CAB Committees	Joanne Klein	1/9/2025 7:04 AM

CalendarYear: 2025 (7)

	Sample contract 4.docx	2025	DEMO – CAB Committees	Joanne Klein	1/9/2025 7:04 AM
	Sample contract 4.pdf	2025	DEMO – CAB Committees	Joanne Klein	1/9/2025 7:04 AM
	Sample contract 5.docx	2025	DEMO – CAB Committees	Joanne Klein	1/9/2025 7:04 AM
	Sample contract 5.pdf	2025	DEMO – CAB Committees	Joanne Klein	1/9/2025 7:04 AM
	Sample document 1.docx	2025	DEMO – CAB Committees	Joanne Klein	1/9/2025 7:04 AM
	Sample document 2.docx	2025	DEMO – CAB Committees	Joanne Klein	1/9/2025 7:04 AM
	Sample document 3.docx	2025	DEMO – CAB Committees	Joanne Klein	1/9/2025 7:04 AM

Calendar Year event triggered for all files tagged with 2023 with an event date of 12/31/2023

Calendar Year event triggered for all files tagged with 2024 with an event date of 12/31/2024

Return to classic SharePoint

Example: Auto-apply label to Expired Corporate Policies

Search

Managed Properties | Crawled Properties | Categories

Use this page to view, create, or modify managed properties and map crawled properties to managed properties. Search automatically extracts crawled properties from crawled content. You add the content of a crawled property to the search index by mapping the crawled property to a managed property. You can use the settings of the managed property to restrict search results. Search automatically creates managed properties for site columns that contain values. Automatically created managed properties are displayed in grey text on this page. Changes to a managed property will take effect after the next full crawl. Note that the settings that you can adjust depend on your current authorization level.

Enter a name or partial name in the "Managed property" field to list matches. Click "Load All Managed Properties" to view and page through all managed properties.

Filter

Managed property 

1-time configuration in the tenant-level search schema (SP Admin Center)

New Managed Property	MAPPED CRAWLED PROPERTIES									Aliases
PROPERTY NAME	TYPE	MULTI	QUERY	SEARCH	RETRIEVE	REFINE	SORT	SAFE		
RefinableDate02	Date and Time	Multi	Query	-	Retrieve	Refine	Sort	Safe	OWS_Q_DATE_POLICYEXPIRYDATE	

What you use in the KeyQL to auto-apply the label



Options to apply a label via Auto-apply label policy...

Choose the type of content you want to apply this label to

- Apply label to content that contains sensitive info
- Apply label to content that contains specific words or phrases, or properties
- Apply label to content that matches a trainable classifier
- Apply label to cloud attachments and links shared in Exchange, Teams, Viva Engage, and Copilot ⓘ

Example: Auto-apply label to Expired Corporate Policies

SharePoint

Search this library

DEMOPHANTO DEMO Hub Teams

DEMOPHANTO DEMO SITE Home Retention Demos SharePoint Premium Demos Sensitive Library Important Stuff LargeLibrary Edit General Following Site access

POLICY Library

All Documents + Add view

AI actions Add shortcut to OneDrive Forms Classify and extract ... + Create or upload

Details

Name	Content Type	PolicyExpiryDate	Retention label	Retention label Applied	Label applied by	Sensitivity
Sample document 1.docx	Corporate Policy	12/31/2021	Corporate Policy	10/13/2022 11:51 AM	System Account	General
Sample document 2.docx	Corporate Policy	12/31/2021	Corporate Policy	10/13/2022 11:51 AM	System Account	Confidential
Sample document 3.docx	Corporate Policy					General
Sample document 4.docx	Corporate Policy	12/31/2021	Corporate Policy	10/13/2022 11:51 AM	System Account	Confidential
Sample document 5.docx	Corporate Policy					Confidential
Sample policy 1.docx	Corporate Policy	1/31/2023	Corporate Policy	2/1/2023 6:53 AM	System Account	Confidential
Sample policy 2.docx	Corporate Policy	1/31/2023	Corporate Policy	2/1/2023 6:53 AM	System Account	Confidential
Sample policy 3.docx	Corporate Policy	1/31/2023	Corporate Policy	2/1/2023 6:53 AM	System Account	Confidential
Sample policy 4.docx	Corporate Policy	12/31/2021	Corporate Policy	10/13/2022 11:51 AM	System Account	Confidential
Sample policy 5.docx	Corporate Policy	12/31/2021	Corporate Policy	10/13/2022 11:51 AM	System Account	Confidential
Team Policy 1.docx	Corporate Policy					General
Team Policy 1.pdf	Corporate Policy	12/31/2023	Corporate Policy	1/2/2024 2:24 AM	System Account	
Team Policy 2.docx	Corporate Policy	12/31/2023	Corporate Policy	1/2/2024 2:24 AM	System Account	Confidential
Team Policy 3.docx	Corporate Policy	12/31/2023	Corporate Policy	1/2/2024 2:24 AM	System Account	General
Team Policy 4.docx	Corporate Policy					Confidential

Example: Auto-apply label to Fiscal Year documents

Search

Managed Properties | Crawled Properties | Categories

Use this page to view, create, or modify managed properties and map crawled properties to managed properties. Search automatically extracts crawled properties from crawled content. You add the content of a crawled property to the search index by mapping the crawled property to a managed property. You can use the settings of the managed property to restrict search results. Search automatically creates managed properties for site columns that contain values. Automatically created managed properties are displayed in grey text on this page. Changes to a managed property will take effect after the next full crawl. Note that the settings that you can adjust depend on your current authorization level.

Enter a name or partial name in the "Managed property" field to list matches. Click "Load All Managed Properties" to view and page through all managed properties.

Filter

Managed property 

1-time configuration in the tenant-level search schema (SP Admin Center)

New Managed Property											
PROPERTY NAME	TYPE	MULTI	QUERY	SEARCH	RETRIEVE	REFINE	SORT	SAFE	MAPPED CRAWLED PROPERTIES	ALIASES	
RefinableString15	Text	Multi	Query	-	Retrieve	Refine	Sort	Safe	OWS_TAXID_FISCALYEAR	FISCALYEARALIASNEW	

What you use in the KeyQL to auto-apply the label



Example: Auto-apply label to Fiscal Year documents

SharePoint

Search this library

Joanne Klein

Finance Demo Hub Our Teams

Finance Team A

Private group | General ★ Following 2 members

FT

Home Conversations Documents Notebook Pages FY Documents Joanne Library Sample Library Agreements Site contents Recycle bin Edit

Documents

All Documents + Add view

AI actions Add shortcut to OneDrive Forms Classify and extract ... + Create or upload

Details

Name	Sensitivity	FiscalYear	Retention label	Retention label Applied	Label applied by
FiscalYear: 2021-22 (3)					
Sample Budget document 1.docx	Confidential	2021-22	FY Event Label	8/21/2022 10:51 PM	System Account
Sample document 1.docx	General	2021-22	FY Event Label	8/21/2022 10:51 PM	System Account
Sample document 2.docx	Confidential	2021-22	FY Event Label	8/21/2022 10:51 PM	System Account
FiscalYear: 2022-23 (6)					
Doc with a cust that I dismissed the recommendati...	Highly Confidential	2022-23	FY Event Label	12/25/2022 2:27 PM	System Account
Document - Highly Confidential.docx	Highly Confidential	2022-23	FY Event Label	4/2/2023 4:09 AM	System Account
Sample Budget document 3 - Confidential.docx	Confidential	2022-23	FY Event Label	8/25/2022 3:53 AM	System Account
Sample Budget document 4 - Confidential.docx	Confidential	2022-23	FY Event Label	8/25/2022 3:53 AM	System Account
Sample document 4 - Confidential.docx	Confidential	2022-23	FY Event Label	8/25/2022 3:53 AM	System Account
Sample document 5 - Confidential.docx	Confidential	2022-23	FY Event Label	8/25/2022 3:53 AM	System Account
FiscalYear: 2024-25 (5)					
Sample policy 1.docx	Confidential \ NexNovus Internal Only	2024-25	FY Event Label	1/8/2026 6:14 PM	System Account
Sample policy 2.docx	Confidential	2024-25	FY Event Label	1/8/2026 6:14 PM	System Account
Sample policy 3.docx	Confidential	2024-25	FY Event Label	1/8/2026 6:14 PM	System Account
Sample policy 4.docx	Confidential	2024-25	FY Event Label	1/8/2026 6:14 PM	System Account
Sample policy 5.docx	Confidential	2024-25	FY Event Label	1/8/2026 6:14 PM	System Account

Return to classic SharePoint

The screenshot shows a SharePoint document library interface. The left navigation bar includes links for Home, Conversations, Documents, Notebook, Pages, FY Documents, Joanne Library, Sample Library, Agreements, Site contents, Recycle bin, and Edit. The main content area is titled 'Documents' and shows a list of files. The list includes columns for Name, Sensitivity, FiscalYear, Retention label, Retention label Applied, and Label applied by. The 'FiscalYear' column uses dropdown menus. The 'Retention label' column shows 'FY Event Label' for most documents. The 'Label applied by' column shows 'System Account' for all documents. The 'FiscalYear' column for the 2024-25 category is highlighted with a purple box. The 2024-25 category contains five documents: 'Sample policy 1.docx', 'Sample policy 2.docx', 'Sample policy 3.docx', 'Sample policy 4.docx', and 'Sample policy 5.docx'. The 'Sensitivity' column for these documents shows 'Confidential' or 'Confidential \ NexNovus Internal Only'. The 'FiscalYear' column for these documents shows '2024-25'. The 'Retention label' column shows 'FY Event Label'. The 'Applied' column shows dates ranging from '1/8/2026 6:14 PM' to '1/8/2026 6:14 PM'. The 'Label applied by' column shows 'System Account'.



Architectural Choices that Sustain Governance

Some Practical Architectural Recommendations

#	Recommendation
1	Establish a Center of Excellence (CoE) site for governance and best practices.
2	Build and maintain a modern (flat) SharePoint Site Architecture (NO SUBSITES!)
3	Establish a well-governed SharePoint information architecture (IA) to help automate retention controls (sites, libraries, folders, content types, metadata). What will you control versus what will business users add via Knowledge agent? Be careful here...
4	<p>Consider (buying/building) a “Container” Provisioning solution to automate a standardized structure to help automate protection and retention controls (E.g., site properties, URL naming standards, site sensitivity label, adaptive scopes, published/auto-applied retention labels, etc.)</p> <p>Examples of site properties that adaptive scopes could be built off:</p> <ul style="list-style-type: none">• Tag all departmental sites with the department name (<i>Build department-based adaptive scopes</i>)• Tag all project sites with “Project site” and its status (<i>Build a project site adaptive scope</i>)• Tag all product sites with “Product site” and the product’s state (<i>Build product-based adaptive scopes</i>)• Tag all legal matter sites with “Legal Matter” and the resolved date once resolved (<i>Build a legal matter adaptive scope</i>) <p>You MUST consider the downstream effects for both new and existing containers!</p>

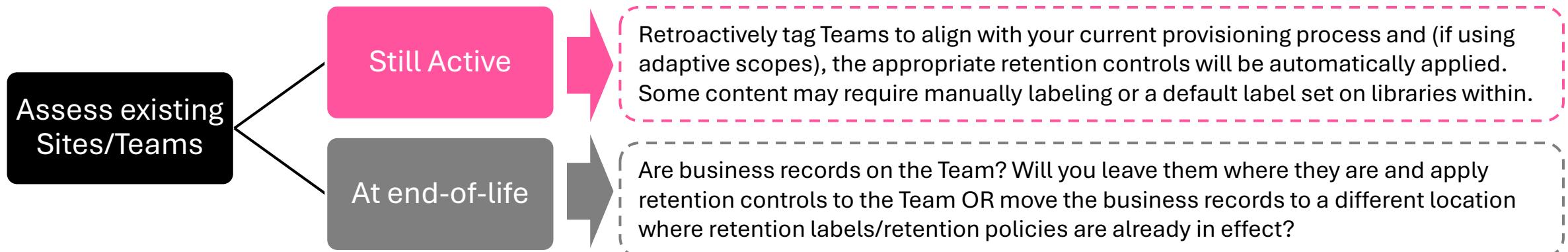
“Container” Provisioning Process

New “Containers”



¹[SharePoint Advanced Management](#) – available either standalone or to organizations with at least 1 user assigned a Copilot license.

Existing “Containers”





The Policy Pile

VS



The Policy Center

DEMO

Before Reorganization and Retention/Deletion Controls



Challenges

Lack of Structure

Disparate content and lack of metadata makes content hard to classify, search, and govern—and reduces Copilot's effectiveness.

ROT Content

Redundant, Obsolete, or Trivial content clutters libraries, hampers productivity, undermines Copilot's accuracy, and increases compliance exposure.

Overshared/Incorrect Permissions

Folder permissions are inconsistent, with some shared too broadly—creating security and compliance risks.

Lack of Purposeful Retention/Deletion Controls

No strategic use of retention labels and policies causes clutter and increases compliance risk.



- Name
- Administrative Units
- Type
- Retention settings
- Finish

Decide if you want to retain content, delete it, or both

- Retain items for a specific period
Items will be retained for the period you choose.
- Retain items forever
Items will be retained forever, even if users delete them.
- Only delete items when they reach a certain age
Items won't be retained, but when they reach the age you choose, we'll delete them from where they're stored.

[Back](#)[Next](#)[Cancel](#)

Let's retain everything in the Policy Pile!



Documents > Policies - WIP ▾

Share Copy link AI actions Add shortcut to OneDrive ... + Create or upload

Details

All Documents + Add view

Name ▾

Modified ▾

Modified By ▾

+ Add column

Bereavement Policy - Zava Corp.docx

13 minutes ago

Joanne Klein

Education Leave Policy- Zava Corp.docx

13 minutes ago

Joanne Klein

Education Leave Policy- Zava Corp_FINAL - updates.docx

A few seconds ago

Joanne Klein

Vacation Policy - Zava Corp.docx

13 minutes ago

Joanne Klein



Disparate site content with Folder-level organization

Policy Pile

Home Documents Pages Site contents Edit General Following Site access

Policies - 2024 >

Share Copy link AI actions Add shortcut to OneDrive ... + Create or upload

All Documents + Add view

Name Modified Modified By + Add column

Name	Modified	Modified By	+ Add column
Bereavement Policy - Zava Corp.docx	About an hour ago	Joanne Klein	
Education Leave Policy- Zava Corp.docx	About an hour ago	Joanne Klein	
Education Leave Policy- Zava Corp_FINAL.docx	About an hour ago	Joanne Klein	
Education Leave Policy- Zava Corp_JoannesConv.docx	About an hour ago	Joanne Klein	
Vacation Policy - Zava Corp.docx			

Zava Corp

Education Leave Policy - Zava Corp.docx

Purpose
Encourage professional development through approved time off for education.

Eligibility
Employees with at least three months of service may apply.

Entitlement
Up to 25 working days per year for approved courses, seminars, or certifications.
Leave may be paid or unpaid based on role relevance and budget.

Approval Process
Submit request with course details, dates, and relevance to job.
Department head approval required; HR verifies eligibility.

Reimbursement & Return
Tuition/fees may be reimbursed upon successful completion with passing grade.
Employees share key learnings with their team within 45 days of return.

Policy Pile agent

- Employees must have at least three months of service to apply.

Entitlement

- Up to 25 working days per year for approved courses, seminars, or certifications.
- Leave can be paid or unpaid, depending on the relevance to the role and budget considerations.

Approval Process

- Submit a request including:
 - Course details
 - Dates
 - Relevance to your job
- Requires department head approval, and HR will verify eligibility.

Reimbursement & Return

- Tuition and fees may be reimbursed upon successful completion with a passing grade.
- Employees are expected to share key learnings with their team within 45 days of returning.

Would you like me to also compare this with other versions of the policy (e.g., older drafts or pending updates) to confirm if there have been recent changes?

1 Education Leave Policy- Zava Corp_FINAL

Ask Policy Pile agent a question

Copilot Agent Output in the Policy Pile



Preservation Hold Library ▾

AI actions



All Documents

+ Add view

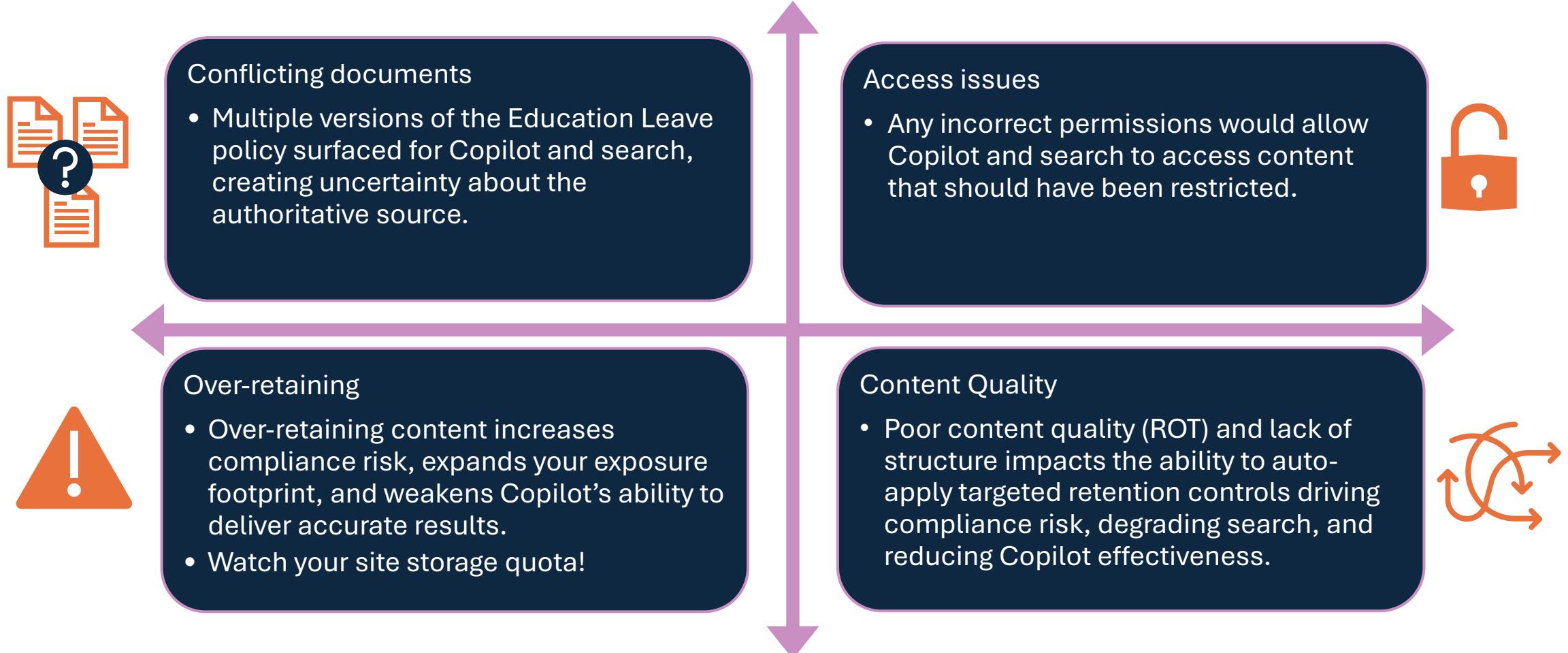


Name	Modified	Modified By	Date Preserved	Expiration Date	Preservation ...	Retention label	Retention lab...	Version
Agreement 001 for Pineview Meadows_0BF40615-3ED6-4E7A-93...	April 14, 2025	Joanne Klein	4/14/2025 3:13 PM	5/14/2025 3:13 PM	1.0			1.0
Agreement 001 for Pineview Meadows_2FDF707E-0CFA-4456-8D...	April 14, 2025	Joanne Klein	4/14/2025 3:13 PM	5/14/2025 3:13 PM	1.0			1.0
Agreement 002 for Stonebrook Heights_36905DC5-7183-4E3E-84...	April 14, 2025	Joanne Klein	4/14/2025 3:13 PM	5/14/2025 3:13 PM	1.0			1.0
Agreement 002 for Stonebrook Heights_E143AE14-C30B-4D20-A...	April 14, 2025	Joanne Klein	4/14/2025 3:13 PM	5/14/2025 3:13 PM	1.0			1.0
Agreement 003 for Maplewood Terrace_316AEF0E-BF61-4851-B3...	October 6, 2025	Joanne Klein	10/6/2025 4:38 PM	11/5/2025 4:38 PM	3.0			3.0
code_of_conduct_2026_D2436914-C2EE-467C-B0D5-C45468F41B...	About a minute ago	Joanne Klein	1/20/2026 2:35 PM	2/19/2026 2:35 PM	1.0			1.0
data_protection_privacy_policy_2026_91DDFD5F-4B77-4BEA-B55...	About a minute ago	Joanne Klein	1/20/2026 2:35 PM	2/19/2026 2:35 PM	1.0			1.0
education_leave_policy_2024 - Mgmt_714FB1B6-E2A6-4E5E-94BB...	About a minute ago	Joanne Klein	1/20/2026 2:35 PM	2/19/2026 2:35 PM	1.0			1.0
education_leave_policy_2024_C483C512-A018-4B4C-94FB-69B43...	About a minute ago	Joanne Klein	1/20/2026 2:35 PM	2/19/2026 2:35 PM	1.0			1.0
education_leave_policy_2025 - Mgmt_2ACB2C67-AA05-4DAC-BB...	About a minute ago	Joanne Klein	1/20/2026 2:35 PM	2/19/2026 2:35 PM	1.0			1.0
education_leave_policy_2025_AA4F5EAE-CED0-42C7-AA96-F159A...	About a minute ago	Joanne Klein	1/20/2026 2:35 PM	2/19/2026 2:35 PM	1.0			1.0
education_leave_policy_2026 - Mgmt_B9E50352-B255-489B-8CCB...	About a minute ago	Joanne Klein	1/20/2026 2:35 PM	2/19/2026 2:35 PM	1.0			1.0
education_leave_policy_2026_74EAA006-56C6-462C-8904-DA3AB...	About a minute ago	Joanne Klein	1/20/2026 2:35 PM	2/19/2026 2:35 PM	1.0			1.0
health_safety_policy_2026_24D8B655-027B-4807-904C-BFDC194...	About a minute ago	Joanne Klein	1/20/2026 2:35 PM	2/19/2026 2:35 PM	1.0			1.0
remote_work_policy_2026_0344D2F4-5934-44C2-B503-D884A96...	About a minute ago	Joanne Klein	1/20/2026 2:35 PM	2/19/2026 2:35 PM	1.0			1.0
remote_work_policy_emea_addendum_2026_A10236C2-C3EF-4C...	About a minute ago	Joanne Klein	1/20/2026 2:35 PM	2/19/2026 2:35 PM	1.0			1.0



This whole time... the Preservation Hold Library is growing...

Compliance and Copilot Before Cleanup





Documents ▾

AI actions ▾

Add shortcut to OneDrive

Forms

Classify and extract

...

+ Create or upload

Details

All Documents

+ Add view



Modified ▾

Modified By ▾

+ Add column

Name	Modified	Modified By
Client Statements	47 minutes ago	Joanne Klein
Misc	47 minutes ago	Joanne Klein
Policies - 2024	47 minutes ago	Joanne Klein
Policies - 2025	47 minutes ago	Joanne Klein
Policies - 2026	47 minutes ago	Joanne Klein
Policies - WIP	3 minutes ago	Joanne Klein
Receipts	47 minutes ago	Joanne Klein
Policy Pile agent.agent	Yesterday at 2:22 PM	Joanne Klein

- Should some of this content live on another site?
- Should some of this content be in a separate library on the same site?
- How will business users consume this information?
- What metadata will help users find what they're looking for?
- What are the retention controls you need to apply on the content?



How can we make this better?

After Reorganization and Retention/Deletion Controls



Information Architecture

Introduced some structure with standardized libraries, content types, and metadata for improved organization. There is a clear separation of content by library purpose. (Utilized the SharePoint Knowledge Agent to help organize some libraries; however, I also used site columns to make it more scalable)

Addressed Oversharing Issues

Using SharePoint Advanced Management (SAM) reports, cleaned up oversharing issues to ensure clean permission inheritance and predictable access. This has positive downstream effects on search and Copilot.

Retention and Deletion Controls

Applied both a retention policy with a “delete only” action to clean up the libraries on the site to reduce ROT and applied targeted retention labels to retain content for historical, business, legal, or regulated purposes.

SharePoint

Search this library

PC Policy Center Home Policies Work-in-progress Standards & Procedures Financial Policy Records Site contents Edit General Following Site access

Policies > 2026

Share Copy link AI actions Add shortcut to OneDrive ... + Create or upload

All Documents Add view

PolicyYear PolicyExpiryDate PolicyType Department Retention label Label applied by Add column

Search this site

EDIT LINKS

Settings › Apply Label

Apply a label to items in this library

The labels here are provided by your organization to help retain and protect important information. When applied, all items in this library will be subject to the label's settings. For example, if you apply a label that retains content for 1 year, all new items in this library will inherit the label and be retained for 1 year. You can also apply the label to items that already exist in the library.

DEMO - Corporate Policy Event (Retain for 1 months)

Apply label to existing items in the library.

Save Cancel

Name	PolicyYear	PolicyExpiryDate	PolicyType	Department	Retention label	Label applied by
Employee Summary - EducationLeavePolicy - FY2026.docx	2026		Education Leave	Human Resources		
Employee Summary - Health&SafetyPolicy - FY2026.docx	2026		Health & Safety	Human Resources		
Employee Summary - RemoteWorkPolicy - FY2026.docx	2026		Remote Work	Human Resources		
FAQ - CodeofConduct - FY2026.docx	2026		Code of Conduct	Human Resources		
FAQ - DataProtectionPolicy - FY2026.docx	2026		Data Protection Policy	Information Technology		

Policy Center after Cleanup and Organization



- Name
- Administrative Units
- Type
- Retention settings
- Finish

Decide if you want to retain content, delete it, or both

- Retain items for a specific period
Items will be retained for the period you choose.
- Retain items forever
Items will be retained forever, even if users delete them.

- Only delete items when they reach a certain age
Items won't be retained, but when they reach the age you choose, we'll delete them from where they're stored.

Delete items older than

of years months days

Delete content based on

Apply a retention policy to delete unlabeled content that hasn't been modified in 2 years

Back

Next

Cancel

SharePoint

Search this library

PC Policy Center

Policies > 2026

All Documents + Add

Name

Department: Health

Department: Human

Department: Information Technology

- Announcement - DataProtectionPolicy - FY2026.docx
- Approval - DataProtectionPolicy - FY2026.docx
- DataProtectionPolicy - FY2026 - Final.docx
- Employee Summary - DataProtectionPolicy - FY2026.docx
- FAQ - DataProtectionPolicy - FY2026.docx

Department: Legal

Department: Operational

Policy Center agent AI-generated content may be incorrect

Here are the policy files for policy year 2026 for the Information Technology department, along with the requested metadata:

File Name	PolicyYear	PolicyExpiryDate	Department	Retention Label
Announcement - DataProtectionPolicy - FY2026.docx	2026	2026-01-17	Information Technology	unknown 1
Approval - DataProtectionPolicy - FY2026.docx	2026	unknown	Information Technology	unknown 2
DataProtectionPolicy - FY2026 - Final.docx	2026	unknown	Information Technology	unknown 3
Employee Summary - DataProtectionPolicy - FY2026.docx	2026	unknown	Information Technology	unknown 4
FAQ - DataProtectionPolicy - FY2026.docx	2026	unknown	Information Technology	unknown 5

Notes:

- The PolicyYear is confirmed as 2026 for all listed files.
- PolicyExpiryDate was only available for the announcement file; others did not specify this metadata.
- Retention Label information was not provided in the metadata for any of these files, so it is marked as unknown.

These prompts:
1. Is the document part of the Information Technology department? Create a function to check if the Department metadata is 'Information Technology'. If so, return 'known'. Otherwise, return 'unknown'.
2. Direct
3. The Information Technology department, along with the
4. PolicyYear, PolicyExpiryDate, Department, Retention Label
2026, 2026-01-17, Information Technology, unknown 1
2026, unknown, Information Technology, unknown 2
2026, unknown, Information Technology, unknown 3
2026, unknown, Information Technology, unknown 4
2026, unknown, Information Technology, unknown 5
5. sted files.
announcement file; others did not specify this metadata.
ed in the metadata for any of these files, so it is marked as
ies for quick access or prepare a summary of key changes in

Ask Policy Center agent a question

Copilot Agent Output After Cleanup and Organization



Guidelines ▾

AI actions ▾ Add shortcut to OneDrive Forms Classify and extract ... + Create or upload

All Documents

+ Add view



Details

Name	Document category	Review cycle frequency	Key recommendations summary	+ Add column
AI_Usage_Guideline.docx	Technology	Annual	Follow approved methods and tools, appl...	
Brand_Style_Guideline.docx	Operational	Annual	Follow approved methods and tools, appl...	
Customer_Interaction_Guideline.pdf	Operational	Annual	Follow approved methods and tools, appl...	
Data_Handling_Guideline.pdf	Technology	Annual	Follow approved methods and tools, appl...	
Email_Usage_Guideline.docx	Operational	Annual	Follow approved methods and tools, appl...	
Expense_Submission_Guideline.docx	Financial	Annual	Follow approved methods and tools, appl...	
File_Naming_Guideline.pdf	Operational	Annual	Follow approved methods and tools, appl...	
Incident_Logging_Guideline.docx	Technology	Annual	Follow approved methods and tools, appl...	
Meeting_Conduct_Guideline.pdf	Operational	Annual	Follow approved methods and tools, appl...	
Mobile_Device_Guideline.pdf	Technology	Annual	Follow approved methods and tools, appl...	
Password_Creation_Guideline.docx	Technology	Annual	Follow approved methods and tools, appl...	
Project_Documentation_Guideline.docx	Operational	Annual	Follow approved methods and tools, appl...	
Records_Transfer_Guideline.pdf	Operational	Annual	Follow approved methods and tools, appl...	
Remote_Work_Guideline.pdf	Human Resources	Annual	Follow approved methods and tools, appl...	
Retention_Review_Guideline.docx	Operational	Annual	Follow approved methods and tools, appl...	
SharePoint_Contribution_Guideline.pdf	Technology	Annual	Follow approved methods and tools, appl...	
Team_Collaboration_Guideline.pdf	Human Resources	Annual	Follow approved methods and tools, appl...	
Template_Usage_Guideline.docx	Operational	Annual	Follow approved methods and tools, appl...	
Travel_Booking_Guideline.pdf	Financial	Annual	Follow approved methods and tools, appl...	
Vendor_Communication_Guideline.docx	Operational	Annual	Follow approved methods and tools, appl...	



Organize the Guidelines library with the Knowledge Agent



Guidelines

Unsaved changes

All Documents

+ Add view



AI actions

Add shortcut to OneDrive

Forms

Classify and extract

...

+ Create or upload



Name	Document category	Review cycle frequency	Retention label	Label applied by	+ Add column
AI_Usage_Guideline.docx	Technology	Annual			
Data_Handling_Guideline.pdf	Technology	Annual			
Incident_Logging_Guideline.docx	Technology	Annual			
Mobile_Device_Guideline.pdf	Technology	Annual			
Password_Creation_Guideline.docx	Technology	Annual			
SharePoint_Contribution_Guideline.pdf	Technology	Annual			
Brand_Style_Guideline.docx	Operational	Annual			
Customer_Interaction_Guideline.pdf	Operational	Annual			
Email_Usage_Guideline.docx	Operational	Annual			
File_Naming_Guideline.pdf	Operational	Annual			
Meeting_Conduct_Guideline.pdf	Operational	Annual			
Project_Documentation_Guideline.docx	Operational	Annual			
Records_Transfer_Guideline.pdf	Operational	Annual			
Retention_Review_Guideline.docx	Operational	Annual			
Template_Usage_Guideline.docx	Operational	Annual			
Vendor_Communication_Guideline.docx	Operational	Annual			
Remote_Work_Guideline.pdf	Human Resources	Annual			
Team_Collaboration_Guideline.pdf	Human Resources	Annual			
Expense_Submission_Guideline.docx	Financial	Annual			
Travel_Booking_Guideline.pdf	Financial	Annual			

Apply a retention label automatically to all content tagged with a Document category of “Technology”

Apply a retention label based on an autofill column...





- Name
- Info to label
- Administrative Units
- Scope
- Label
- Finish

Choose a label to auto-apply

We'll automatically apply this label to content in the locations you choose. Users will see the label applied to content that matches your specified conditions within a week.

+ Replace label

Name	Retention settings	Is record	Is regulatory
DEMO - Tech Guidelines	545 days keep + review + de... No	No	

Back

Next

Cancel



Guidelines

Unsaved changes

All Documents

+ Add view



AI actions

Add shortcut to OneDrive

Forms

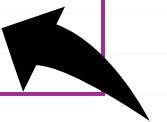
Classify and extract

...

+ Create or upload



Name	Document category	Review cycle frequency	Retention label	Label applied by	+ Add column
AI_Usage_Guideline.docx	Technology	Annual			
Data_Handling_Guideline.pdf	Technology	Annual			
Incident_Logging_Guideline.docx	Technology	Annual			
Mobile_Device_Guideline.pdf	Technology	Annual			
Password_Creation_Guideline.docx	Technology	Annual			
SharePoint_Contribution_Guideline.pdf	Technology	Annual			
Brand_Style_Guideline.docx	Operational	Annual			
Customer_Interaction_Guideline.pdf	Operational	Annual			
Email_Usage_Guideline.docx	Operational	Annual			
File_Naming_Guideline.pdf	Operational	Annual			
Meeting_Conduct_Guideline.pdf	Operational	Annual			
Project_Documentation_Guideline.docx	Operational	Annual			
Records_Transfer_Guideline.pdf	Operational	Annual			
Retention_Review_Guideline.docx	Operational	Annual			
Template_Usage_Guideline.docx	Operational	Annual			
Vendor_Communication_Guideline.docx	Operational	Annual			
Remote_Work_Guideline.pdf	Human Resources	Annual			
Team_Collaboration_Guideline.pdf	Human Resources	Annual			
Expense_Submission_Guideline.docx	Financial	Annual			
Travel_Booking_Guideline.pdf	Financial	Annual			



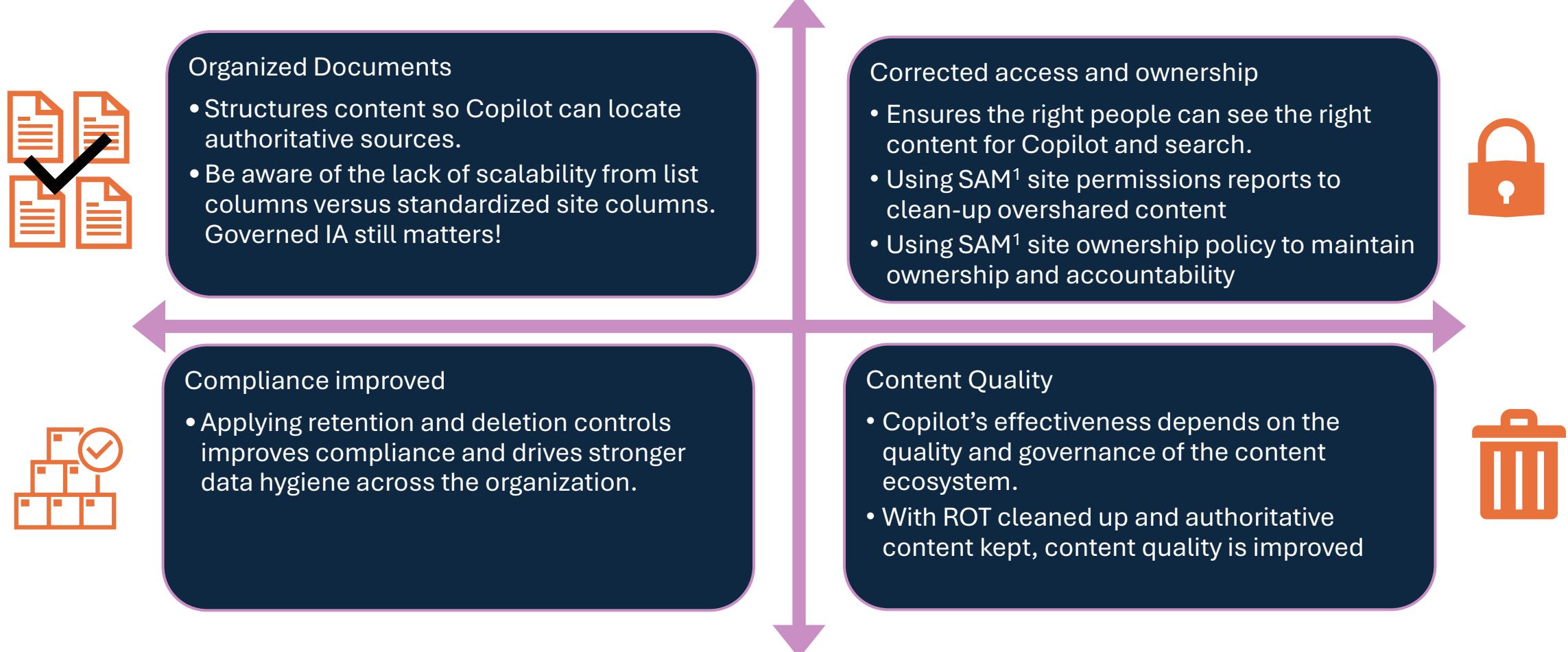
Demo gods were not on my side today!! 😊

Trust me... the label will be applied!



Retention label automatically applied

Compliance and Copilot After Cleanup



¹[SharePoint Advanced Management](#) – available either standalone or to organizations with at least 1 user assigned a Copilot license.

Wrapping it up!

Key Takeaway... Outdated architectures, inconsistent governance, ROT-heavy content, and permissive sharing undermine compliance and AI-readiness

My recommendations for DLM/RM

- Establish a **clear, authoritative**, organizational (not Purview) retention **policy** so employees feel supported—not exposed—when making decisions concerning retention and deletion
- Establish clear **record stewardship roles** to maintain compliance and ensure content is AI-ready
- Incorporate a **provisioning solution** with intelligent tags (for adaptive scopes)
- Use **adaptive scopes** for:
 - automated retention policies (ideally with a delete action)
 - auto-apply retention label policies to align with your simplified file plan
- Incorporate **auditing and reporting** controls (will likely have to build custom for this)



Questions and Discussion

Thank you!

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