



NAME: STEPHEN KYALO -ADC-DP01-25005

PROGRAM: DATA PROTECTION SPECIALIST

CLOUD SLICE TOPIC: RETENTION POLICIES

EXECUTIVE SUMMARY

This report explores the configuration and management of retention policies and labels using Microsoft Purview. Retention policies help organisations determine how long data should be kept and what actions to take once that period ends. These policies can be applied broadly across platforms like Exchange, SharePoint, OneDrive, and Microsoft Teams, while retention labels offer more granular control at the individual file level.

The report outlines the creation of both static and adaptive retention policies, where adaptive policies dynamically respond to organisational changes using targeted queries.

Administrators can implement these policies via the Purview portal or PowerShell and choose between immediate publishing or simulation mode for testing. It also highlights the application of retention settings in Outlook and SharePoint, enhancing email and document governance.

Additionally, event-based retention labels are discussed, offering data lifecycle management triggered by events like contract expirations or employee offboarding. These capabilities collectively ensure that organisations maintain compliance with data retention requirements while supporting efficient information governance.

EXECUTIVE SUMMARY.....	2
1. CONFIGURE RETENTION POLICIES.....	3
1.1. Creating Retention policies and labels in Purview.....	4
1.2. Creating a retention policy for specific apps- Teams.....	6
1.3. Creating a retention policy using PowerShell.....	6
1.4. Creating adaptive retention policies.....	7
1.5. Publishing Retention policies to users.....	7
2. IMPLEMENT RETENTION LABELS.....	8
2.1. Publishing retention labels and policies.....	8
2.2. Applying retention policies in Outlook.....	8
2.3. Implementation of retention policies in to SharePoint files.....	9
3. CONFIGURING EVENT-BASED RETENTION.....	10
3.1. Creating an event-based retention label.....	10
3.2. Publishing an event-based retention label.....	10

1. CONFIGURE RETENTION POLICIES

Retention policies outline the duration for which data should be retained and specify the actions to be taken once the retention period has expired. With Microsoft Purview, organisations can determine the duration for which data stored in various locations, such as SharePoint and OneDrive, is retained. Additionally, they can define the procedures followed once the retention period ends.

Retention policies are used to apply retention settings across broader storage locations such as mailboxes or SharePoint sites. Retention labels, on the other hand, are applied to individual files. They can be applied manually or automatically using event triggers, such as file creation.

Below are some demonstrations of configuring retention policies and labels.

1.1. Creating Retention policies and labels in Purview.

The screenshot displays the Microsoft Purview web interface for creating a retention policy. The browser address bar shows the URL: <https://purview.microsoft.com/data/lifecyclemanagement/retention?tid=5a487e8f-2d32-4690-9bf1-6599...>. The interface is titled "Microsoft Purview" and "Data lifecycle management > Create retention policy".

The main configuration area is divided into sections:

- Policy name:** Company wide (with an [Edit](#) link).
- Description:** All locations except for teams (with an [Edit](#) link).
- Locations to apply the policy:** Exchange mailboxes (All Recipients), SharePoint classic and communication sites (All Sites), OneDrive accounts (All Sites), and Microsoft 365 Group mailboxes & sites (All Groups) (with an [Edit](#) link).
- Retention settings:** Retain items for 3 years based on when they were last modified. Delete items at end of retention period.

At the bottom of the configuration area are buttons for "Back", "Submit", and "Cancel".

On the right side, there is a sidebar titled "Microsoft Information Protection Administration" with a progress bar showing "17 Hr 42 Min Remaining" and "100%". It contains instructions for the next steps:

- 11. Select **Next**.
- 12. On the **Decide if you want to retain content, delete it, or both** page, ensure these values are set for the retention configuration:
 - Select **Retain items for a specific period**.
 - Under **Retain items for a specific period**, select **Custom** from the dropdown list.
 - Change the years field to **3**.
 - Start the retention period based on:** When items were last modified.
 - At the end of the retention period:** Delete items automatically.
- 13. Select **Next**.
- 14. On the **Review and finish** page select **Submit**.
- 15. Once your policy is created select **Done** on the

The bottom of the sidebar shows a progress bar for "45% Tasks Complete" and navigation links for "Previous" and "Next".

Retention policies | Microsoft Purview

https://purview.microsoft.com/datalifecyclemanagement/retention?tid=5a487e8f-2d32-4690-9bf1-6599...

Microsoft Purview

Home

Solutions

Agents

Learn

Settings

Data Lifecycle Management

Data Loss Prevention

Explorers

Data Lifecycle Management

Overview

Retention labels

Retention policies

Label policies

Policy lookup

Priority cleanup (preview)

Exchange (legacy)

Classifiers

Explorers

Use retention policies to keep the content you want and get rid of what you don't need. [Learn more about creating retention policies](#)

Set up pay-as-you-go to create new AI related policies. To create new policies that include Copilot experiences, Enterprise AI apps & Other AI apps locations, you must first link an Azure subscription for billing. There's no charge for retaining interactions in Microsoft 365 Copilot. [Learn more about pay-as-you-go billing](#)

Set up billing

+ New retention policy

1 of 7 selected

Search

Name	Created by
<input checked="" type="checkbox"/> Company wide	Joni Sherman
<input type="checkbox"/> Employee Records	Megan Bowen
<input type="checkbox"/> Medical Records Retention Policy	Megan Bowen
<input type="checkbox"/> Personal Financial PII	Megan Bowen

Microsoft Information Protection Administration

17 Hr 41 Min Remaining

Instructions Resources Help

8. On the Policy Scope page select Next.

9. On the Choose the type of retention policy to create page, select Static then select Next.

10. In the Choose where to apply this policy these locations:

- Exchange mailboxes
- SharePoint classic and communication sites
- OneDrive accounts
- Microsoft 365 Group mailboxes & sites

11. Select Next.

12. On the Decide if you want to retain content, delete it, or both page, ensure these values are set for the retention configuration:

- Select Retain items for a specific period.
- Under Retain items for a specific period, select Custom from the dropdown list
- Change the years field to 3
- Start the retention period based on: When items were last modified
- At the end of the retention period: Delete items automatically

46% Tasks Complete

Previous Next

File plan | Microsoft Purview

Client Error Object reference not found to an object that has been moved. Office 365 Security and Compliance Center

https://purview.microsoft.com/recordsmanagement/fileplan?tid=5a487e8f-2d32-4690-9bf1-6599...

Microsoft Purview

Create retention label

Review and finish

Name

File plan descriptors

Label Settings

Period

Finish

Name

VAT Returns and Supporting Documents

Edit

Description for users

Assign this label to VAT Documents to ensure they are retained for the legal period of s...

Edit

Description for admins

Back

Create label

Microsoft Information Protection Administration

16 Hr 8 Min Remaining

Instructions Resources Help

11. On the Define the period page, ensure these values are set for the retention period configuration input:

- How long is the period?: 7 Years
- When should the period begin?: When items were created

12. Select Next.

13. On the Choose what happens during the retention period page, select Retain items even if users delete, then select Next.

14. On the Choose what happens after the retention period page select Deactivate retention settings then select Next.

15. On the Review and finish page select Create label.

16. On the Your retention label is created page select the option to Do Nothing then select Done. The label will be published in a later task.

17. Back on the File plan page, select + Create a label to create another retention label.

18. On the Name your retention label enter:

48% Tasks Complete

Previous Next

1.2. Creating a retention policy for specific apps- Teams

The screenshot shows the Microsoft Purview web interface for creating a retention policy. The left sidebar shows the progress: Name, Administrative Units, Type, Retention settings, and Finish. The main content area shows the 'Create retention policy' form. The 'Policy name' is 'Teams Retention'. The 'Description' is 'Retention for Teams locations'. The 'Locations to apply the policy' are 'Teams channel messages (All Teams)' and 'Teams chats (2 Users)'. The 'Retention settings' are 'Retain items for 3 years based on when they were last modified' and 'Delete items at end of retention period'. The 'Back' and 'Submit' buttons are at the bottom. On the right, the 'Microsoft Information Protection Administration' sidebar shows instructions for creating a retention policy for Teams, including steps 11 through 16. The progress bar indicates 46% tasks complete.

1.3. Creating a retention policy using PowerShell

The screenshot shows a PowerShell terminal window with the following commands and output:

```
PS C:\Users\Admin> New-RetentionCompliancePolicy -Name "Company Wide PS" -ExchangeLocation All -ModernGroupLocation All -SharePointLocation All -OneDriveLocation All
```

Name	Workload	Enabled	Mode
Company Wide PS	Exchange, SharePoint, OneDriveForBusiness, Skype, ModernGroup, DynamicScope	True	Enforce

```
PS C:\Users\Admin> New-RetentionComplianceRule -Name "Company Wide PS Rule" -Policy "Company Wide PS" -RetentionDuration 1095 -ExpirationDateOption ModificationAgeInDays -RetentionComplianceAction Keep
```

Name	Policy	Mode	Comment
Company Wide PS Rule	da0dee3e-7bd0-4fb0-9ffb-30e6467e5a07	Enforce	

```
PS C:\Users\Admin> New-RetentionCompliancePolicy -Name "Teams Retention PS" -TeamsChannelLocation All -TeamsChatLocation "Adele Vance", "Pradeep Gupta"
```

Name	Workload	Enabled
Teams Retention PS	Exchange, SharePoint, OneDriveForBusiness, Skype, ModernGroup, DynamicScope	True

```
PS C:\Users\Admin> New-RetentionComplianceRule -Name "Teams Retention PS Rule" -Policy "Teams Retention PS" -RetentionDuration 1095 -RetentionComplianceAction Keep
```

On the right, the 'Microsoft Information Protection Administration' sidebar shows instructions for creating a retention policy using PowerShell, including steps 7 through 9. The progress bar indicates 48% tasks complete.

1.4. Creating adaptive retention policies

Retention policies can either be static or adaptive. Static policies are applied to specific sites and require manual updates when changes occur to their data sets. Adaptive policies use queries to cater for changes in an organisation dynamically.

Microsoft Purview

Create adaptive scope

- ✓ Name
- ✓ Admin unit
- ✓ Scope type
- Review

Legal Documents Retention

Description: Retention for legal related documents

Admin unit: Full directory

Type: User

Query summary: Department = Legal Or Department = Retail

Back Submit

Microsoft Information Protection Administration

17 Hr 24 Min Remaining

Instructions Resources Help

10. Add a second attribute by selecting + Add attribute on the Create the query to define users page. In the new field under the one we just configured, configure these values:

- Select the dropdown for the query operator and update it from And to Or
- Select the Attribute dropdown then select Department
- Leave the default is equal to value in the next field
- Enter T Retail as the Value

11. Select Next.

12. On the Review and finish page select Submit.

13. Once your adaptive scope is created select Done on the Your scope was created page.

14. Back on the Adaptive scopes page, select Solutions from the bottom of the left sidebar.

48% Tasks Complete

Previous Next

1.5. Publishing Retention policies to users.

When creating retention policies and labels, one can either publish them immediately or run them in simulation mode. This allows fine-tuning of the labels and policies in case of any errors in their functionality.

Microsoft Purview

Publish labels so users can apply them to their content.

- ✓ Choose labels to publish
- ✓ Administrative Units
- ✓ Scope
- ✓ Name your policy
- Finish

Most labels will become available to your users within a week. Labels will appear in Outlook and Outlook on the web only for mailboxes that have at least 10 MB of data.

Choose labels to publish

1 label(s) will be published (made available) so your users can classify their content

VAT Returns and Supporting Documents 7 years keep + delete

Applies to content in these locations

Exchange mailboxes (All Recipients)

SharePoint classic and communication sites (All Sites)

OneDrive accounts (All Sites)

Name: VAT Returns and Supporting Documents Retention Label

Description: VAT Returns and supporting documents Retention label, retention period 3 years, Exchange email and SharePoint site locations.

Back Submit Cancel

Microsoft Information Protection Administration

15 Hr 54 Min Remaining

Instructions Resources Help

9. Select Next.

10. On the Name your policy enter:

- Name: VAT Returns and Supporting Documents Retention Label
- Description: VAT Returns and supporting documents Retention label, retention period 3 years, Exchange email and SharePoint site locations.

11. Select Next.

12. On the Finish page select Submit.

13. Once your retention label has been published, select Done on the Your retention label was published page.

You have successfully published the retention label for VAT Returns and supporting documents.

48% Tasks Complete

Previous Next

2. IMPLEMENT RETENTION LABELS

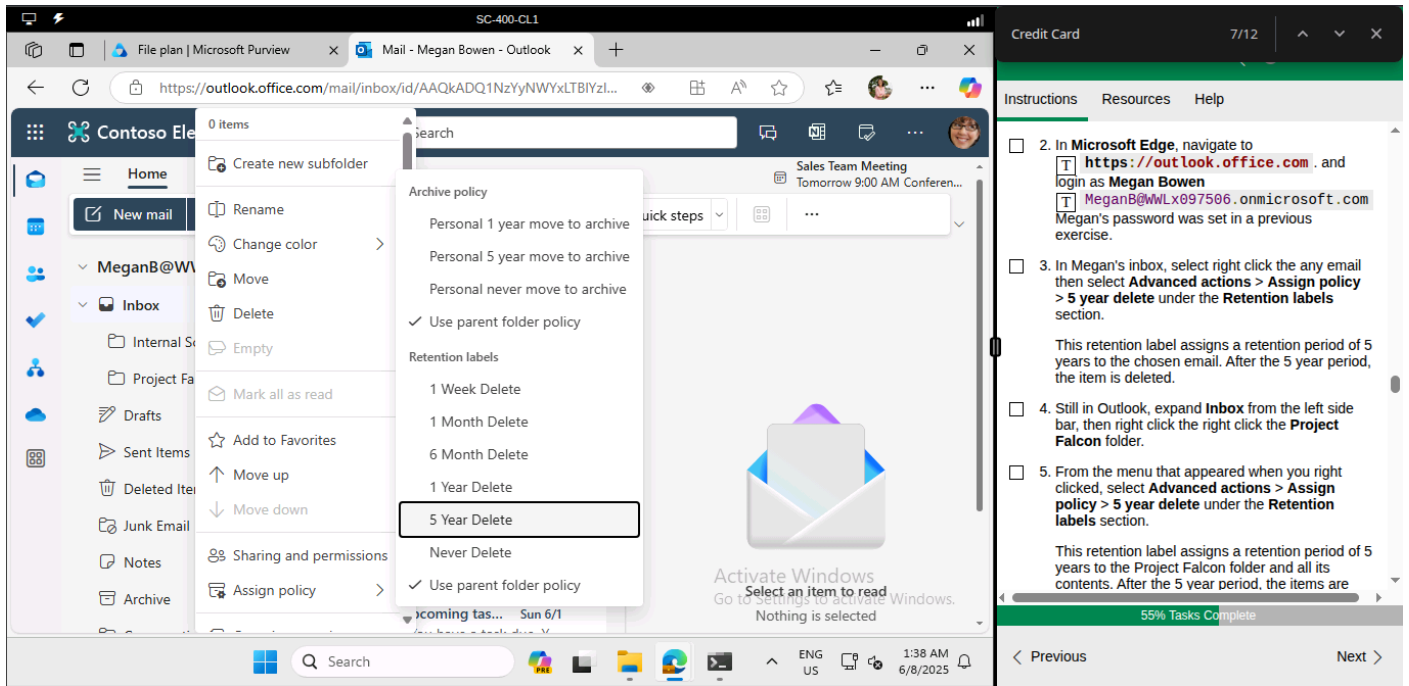
After creating retention labels and policies, admins can either publish them immediately or run them in simulation mode to check their functionality and fine-tune them in case of any inefficiencies.

2.1. Publishing retention labels and policies

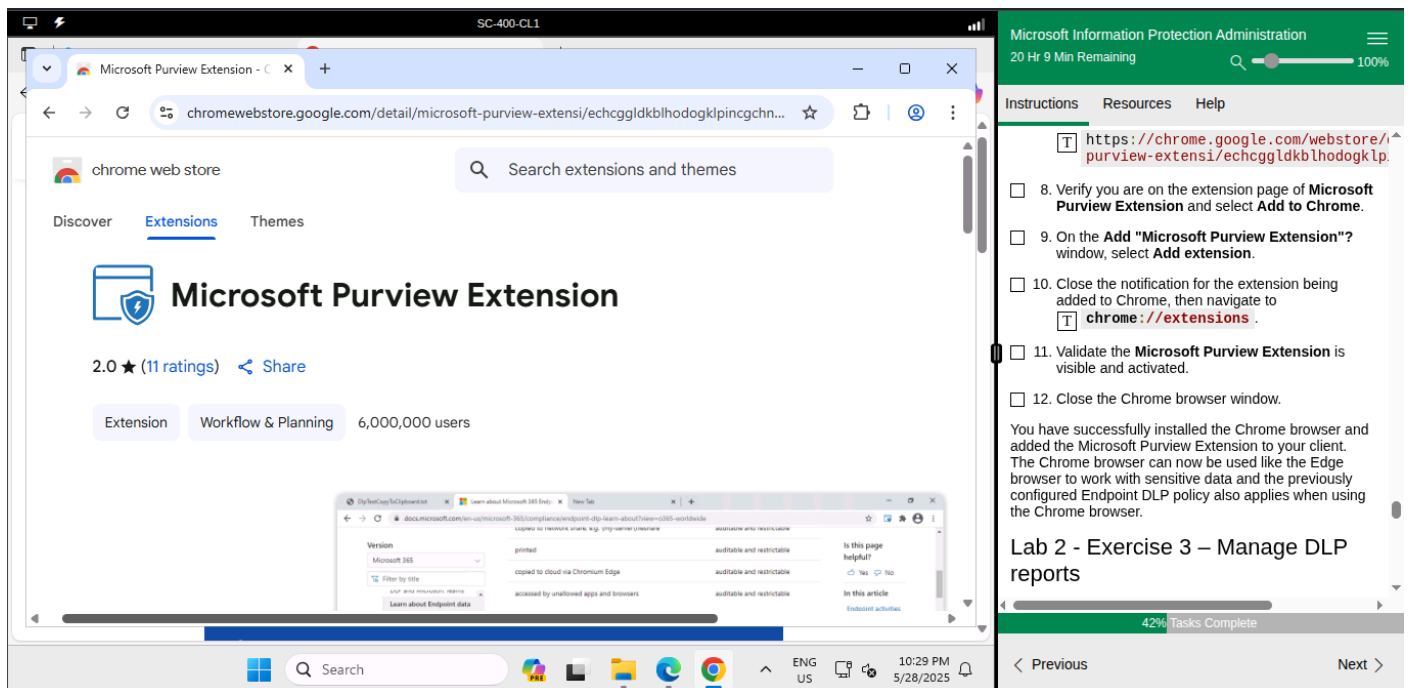
The screenshot displays the Microsoft Purview Information Protection Administration console. The main heading is "Publish labels so users can apply them to their content." On the left, a progress bar shows five steps: "Choose labels to publish" (checked), "Administrative Units", "Scope", "Name your policy", and "Finish" (highlighted). The main content area shows the "Name your policy" step. It includes a warning: "Most labels will become available to your users within a week. Labels will appear in Outlook and Outlook on the web only for mailboxes that have at least 10 MB of data." Below this, it says "Choose labels to publish" and lists "1 label(s) will be published (made available) so your users can classify their content: VAT Returns and Supporting Documents 7 years keep + delete". There are "Edit" links for the label name, description, and locations. The "Applies to content in these locations" section lists "Exchange mailboxes (All Recipients)", "SharePoint classic and communication sites (All Sites)", and "OneDrive accounts (All Sites)". The "Name" field is "VAT Returns and Supporting Documents Retention Label" and the "Description" is "VAT Returns and supporting documents Retention label, retention period 3 years, Exchange email and SharePoint site locations." At the bottom are "Back", "Submit", and "Cancel" buttons. On the right, a sidebar shows "Instructions", "Resources", and "Help". The "Instructions" pane lists steps 9 through 13, with step 10 corresponding to the current screen. A progress bar at the bottom of the sidebar shows "48% Tasks Complete".

2.2. Applying retention policies in Outlook.

This allows users to apply a retention policy to their emails or folders in Outlook and define how long they can be stored. During this time, the emails or folders can't be deleted until the retention period elapses.



2.3. Implementation of retention policies in to SharePoint files.



3. CONFIGURING EVENT-BASED RETENTION

An event-based retention label is based on when a specific event occurs, such as completion of a project, termination of an employee or end of a contract. This is accomplished by associating retention labels with the specific events. The data files also require an asset ID for tracking.

3.1. Creating an event-based retention label

Create retention label

Name

Name
Project Asset
[Edit](#)

Description for users
Assign this label to project documents to ensure they are retained for the period of 5 ye...
[Edit](#)

Description for admins
Project asset for event-based retention.
[Edit](#)

File plan descriptors

Retention settings

Retention period: 5 years
Retention action: Mark items as a record

[Back](#) [Create label](#) [Cancel](#)

3.2. Publishing an event-based retention label

Publish labels so users can apply them to their content.

Finish

Choose labels to publish
1 label(s) will be published (made available) so your users can classify their content
Project Asset 5 years keep + delete
[Edit](#)

Applies to content in these locations
SharePoint classic and communication sites (All Sites)
OneDrive accounts (All Sites)
[Edit](#)

Name
Project Asset Retention Label
[Edit](#)

Description
Project Assets Retention label, retention period 5 years, SharePoint site locations.
[Edit](#)

[Back](#) [Submit](#) [Cancel](#)