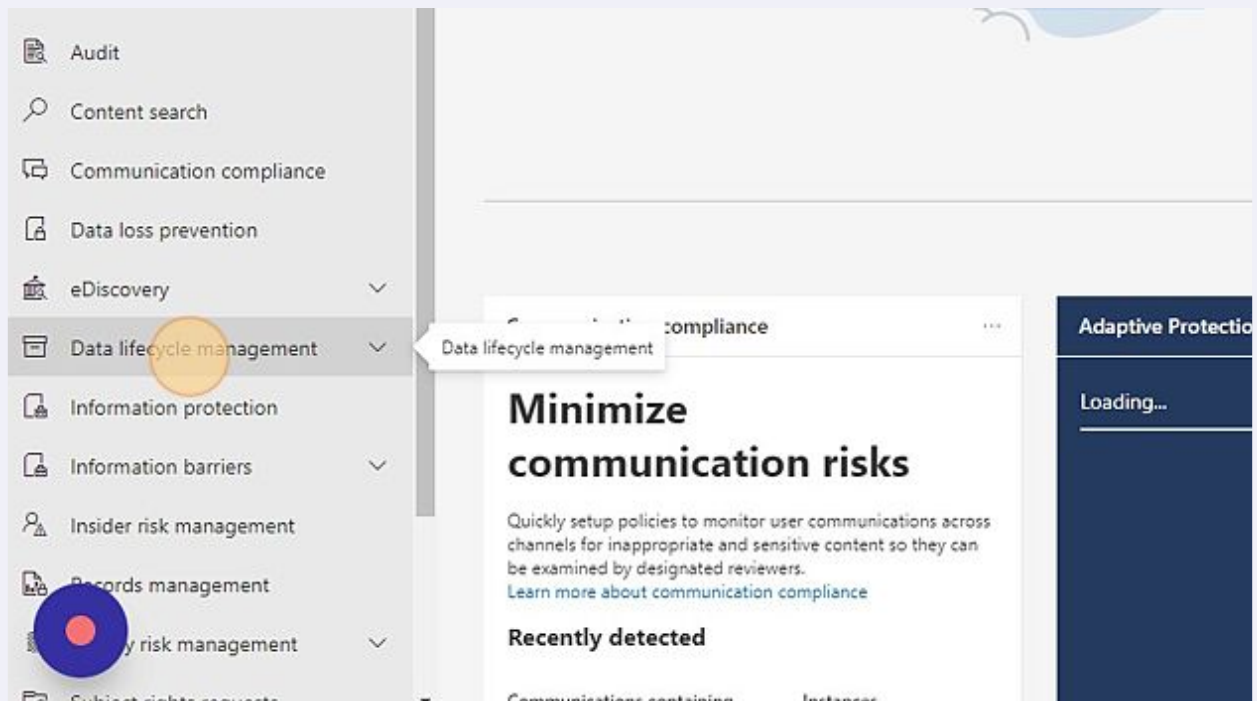


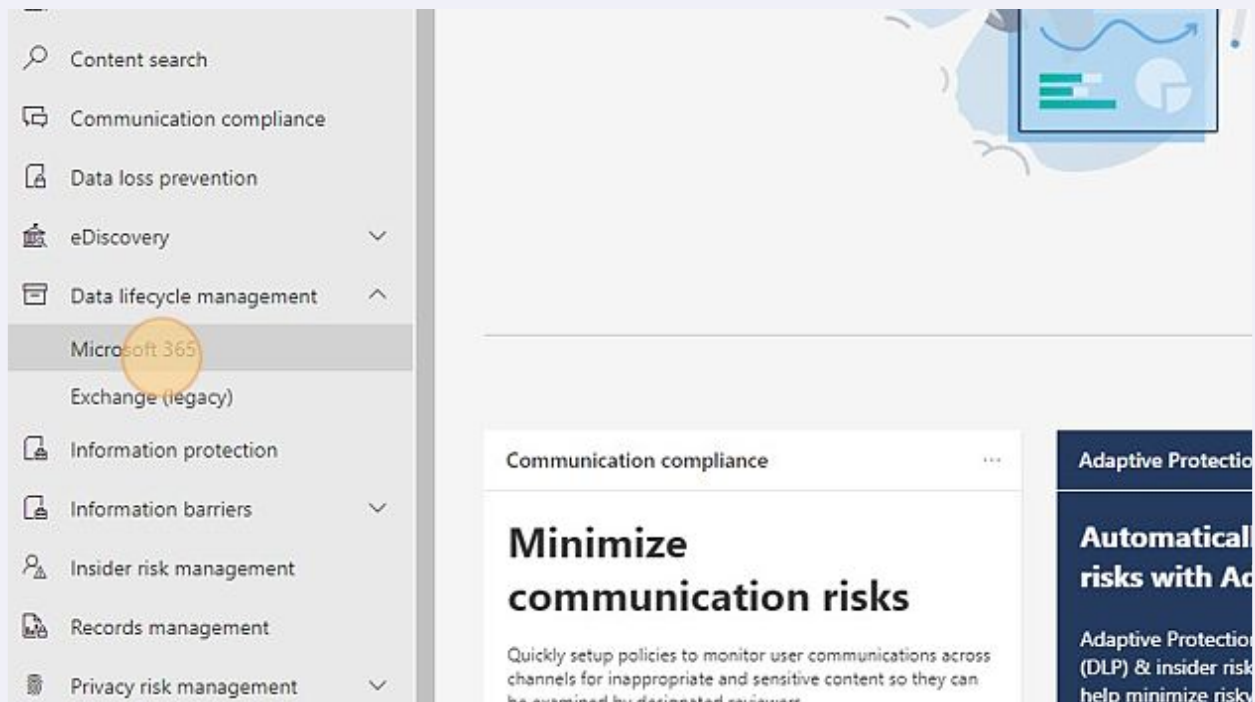
How to Create Retention Labels in Microsoft 365

1 Navigate to compliance.microsoft.com

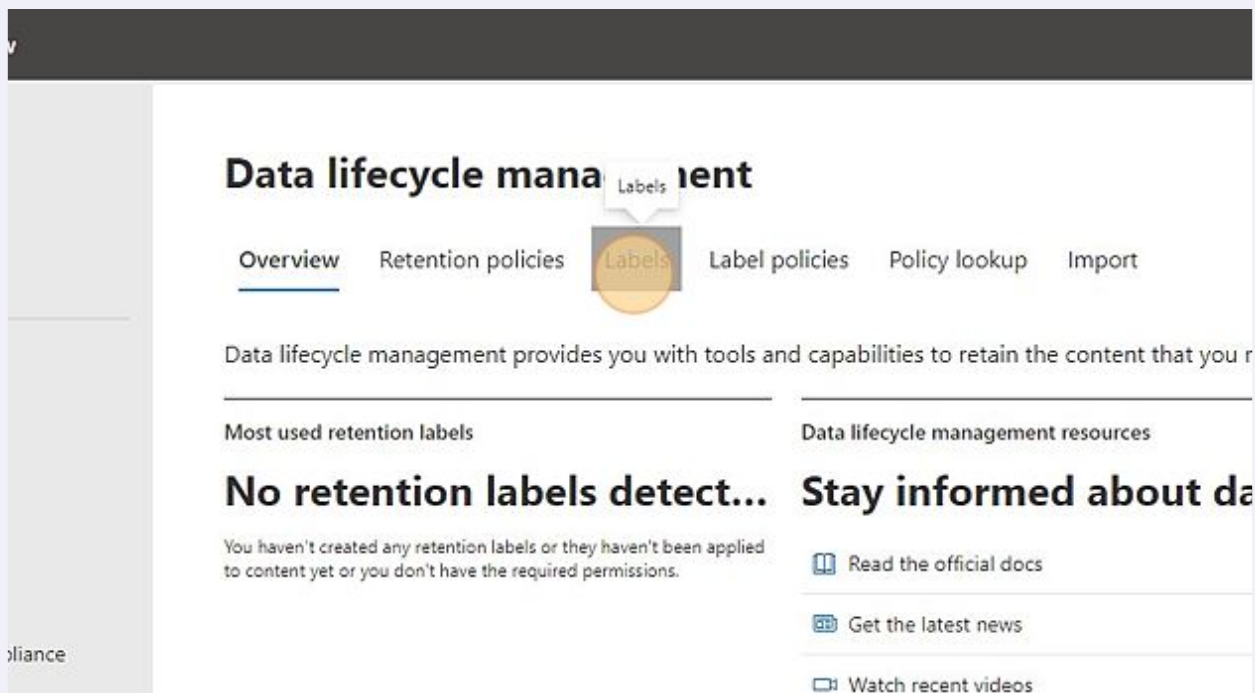
2 Click "Data lifecycle management"



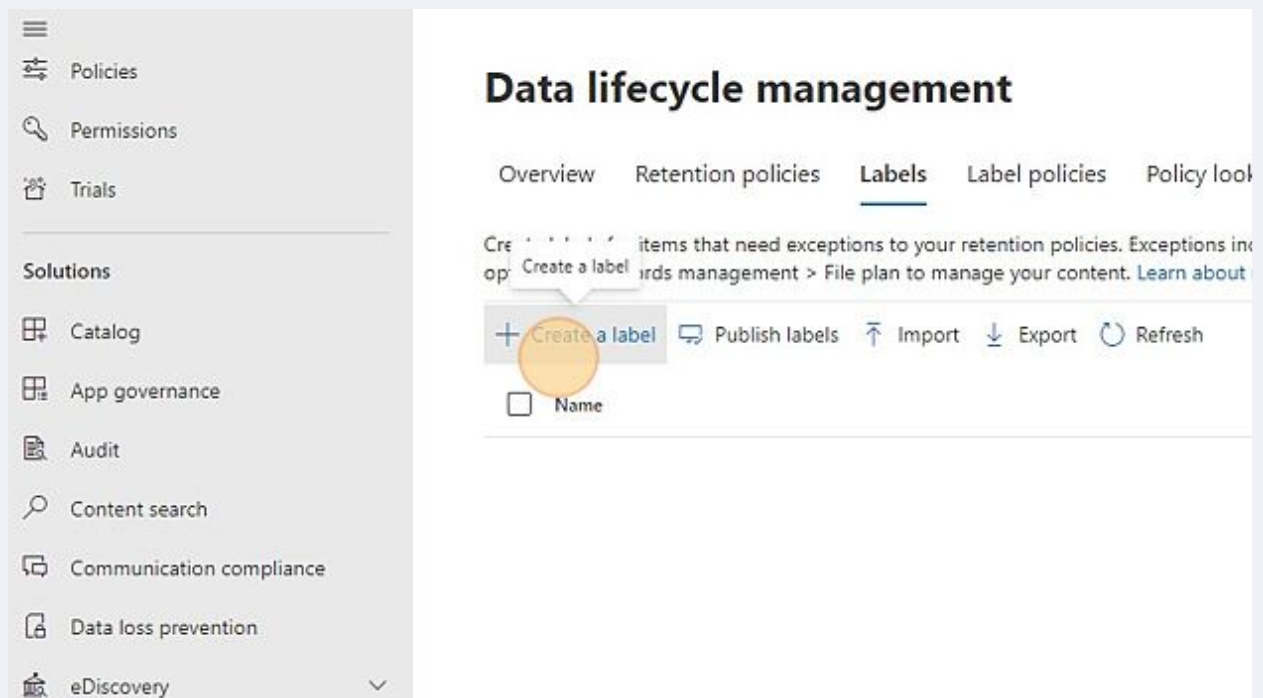
3 Click "Microsoft 365"



4 Click "Labels"

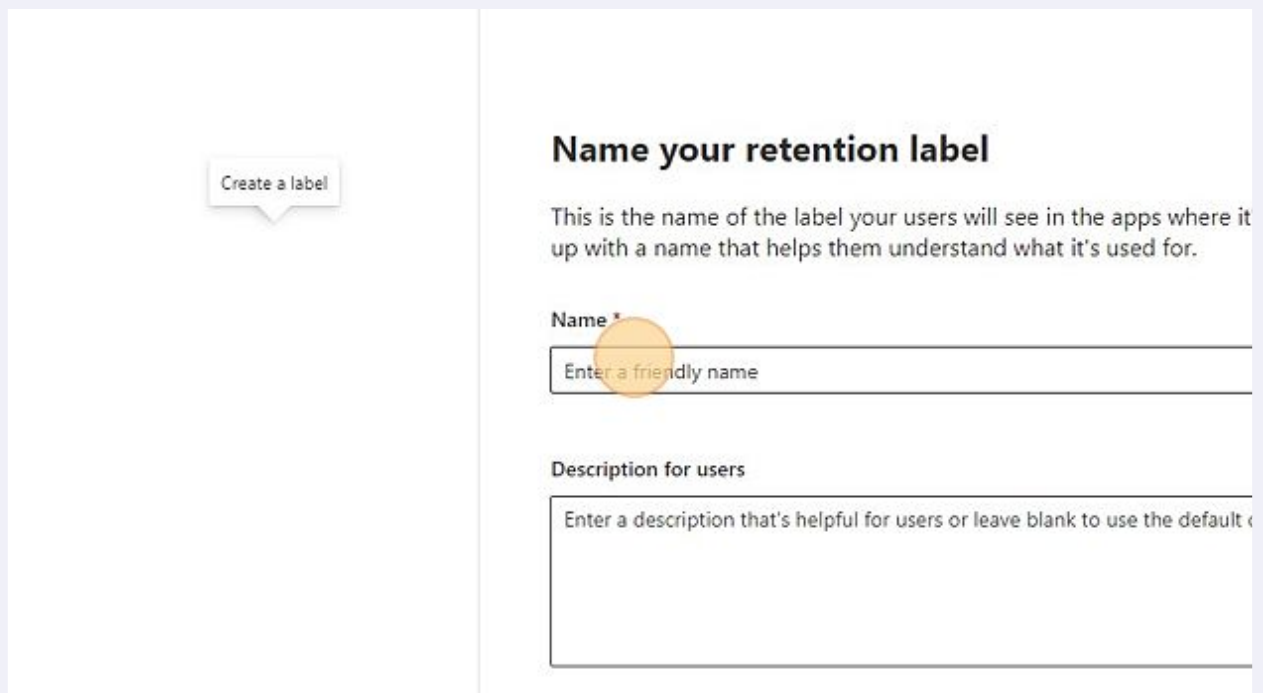


5 Click "Create a label"



The screenshot shows the 'Data lifecycle management' interface. On the left is a sidebar with a menu containing 'Policies', 'Permissions', 'Trials', and a 'Solutions' section with items like 'Catalog', 'App governance', 'Audit', 'Content search', 'Communication compliance', 'Data loss prevention', and 'eDiscovery'. The main area has tabs for 'Overview', 'Retention policies', 'Labels' (which is selected), 'Label policies', and 'Policy look'. Below the tabs, there's a section for 'Create a label' with a sub-header 'Create a label' and a description: 'items that need exceptions to your retention policies. Exceptions include...'. Below this, there's a row of buttons: '+ Create a label' (highlighted with an orange circle), 'Publish labels', 'Import', 'Export', and 'Refresh'. Below the buttons is a table with a header row containing a checkbox and the text 'Name'.

6 Enter "Retain Indefinitely" in the "Name" field.



The screenshot shows the 'Name your retention label' form. On the left is a sidebar with a 'Create a label' button. The main area has a title 'Name your retention label' and a description: 'This is the name of the label your users will see in the apps where it is used. Set up with a name that helps them understand what it's used for.' Below the description is a form with two fields: 'Name *' and 'Description for users'. The 'Name *' field is highlighted with an orange circle and contains the placeholder text 'Enter a friendly name'. The 'Description for users' field is a larger text area with the placeholder text 'Enter a description that's helpful for users or leave blank to use the default description'.

7

Type "Use this label for documents that should be retained indefinitely" in the "Description for users" field.

This is the name of the label your users will see in the apps where it's published (li up with a name that helps them understand what it's used for.

Name *

Retain Indefinitely

Description for users

Enter a description that's helpful for users or leave blank to use the default description

Description for admins

Enter a description that's helpful for admins who will manage this label

8

Type "Permanent hold label" in the "Description for admins" field.

Use this label for documents that should be retained indefinitely

Description for admins

Enter a description that's helpful for admins who will manage this label

Next

9 Click "Next"

Use this label for documents that should be retained permanently

Description for admins

Permanent hold label

Next

10 Select "Retain items forever or for a specific period" and click "Next"

Label Settings

Period

Finish

Define label settings

We'll apply the settings you choose to labeled items

☒ **Retain items forever or for a specific period**
Labeled items can't be permanently deleted during this period. You'll define how long the retention period is and what happens when the retention period in the next steps.

☐ **Enforce actions after a specific period**
Labeled items won't be retained. You can decide whether they should be deleted, or relabeled when the period you specify

☐ **Just label items**
Choose this setting if you only want to classify labeled items. The items won't be retained and your users won't be restricted deleting them.

Back Next

11 Select "Forever"

Specify how long the retention period should be.

Retain items for

7 years

5 years

7 years

10 years

Forever

Custom

Retention period based on

Items were created

New event type

12 Click "Next"

Label Settings

Period

Finish

Define the retention period

Specify how long the retention period should be.

Retain items for

Forever

Back

Next

13 Review settings and click "Create label"

	<p>Description for users Use this label for documents that should be retained indefinitely Edit</p> <p>Description for admins Permanent hold label Edit</p> <p>Retention settings</p> <table><tr><td>Retention period Forever Edit</td><td>Retention action Retain only Edit</td></tr><tr><td>Based on Based on when it was created Edit</td><td></td></tr></table>	Retention period Forever Edit	Retention action Retain only Edit	Based on Based on when it was created Edit	
Retention period Forever Edit	Retention action Retain only Edit				
Based on Based on when it was created Edit					
	<div>Back Create label</div>				

14 Repeat the process for each label you require.

Data lifecycle management

OverviewRetention policies**Labels**Label policiesPolicy lookupImport

Create labels for items that need exceptions to your retention policies. Exceptions include extending the retention period for specific documents or preve options, use Records management > File plan to manage your content. [Learn about using retention labels for exceptions](#)

[+ Create a label](#) [Publish labels](#) [Import](#) [Export](#) [Refresh](#)

<input type="checkbox"/>	Name
<input type="checkbox"/>	Retain 7 Years
<input type="checkbox"/>	Retain 3 Years
<input type="checkbox"/>	Retain 5 Years
<input type="checkbox"/>	Retain Indefinitely
<input type="checkbox"/>	Retain 10 Years