ENABLEMENT STRATEGY AND APPROACH

MY TIP SHEETS

Microsoft Purview Data Lifecycle Management (DLM)

Microsoft Purview Records Management (RM)

MY ASK OF YOU FOR USING/REFERENCING MY TIP SHEETS…

Feel free to download and use these tip sheets for your own purposes. My ask of you in return is to leave the copyright information and NexNovus logo intact on every page if you do. I have spent **many hours** testing and summarizing the information. Thru this process, I've discovered it takes considerably longer to understand and effectively summarize something as it does to document the details. ☺

All tip sheets are time-stamped with the effective date on the bottom of each image. I will keep these up-to-date the best I can over time and as changes to the Microsoft Purview service occur. Although I endeavor for them to be accurate, I'm human and errors may occur. Use at your own risk.

Good luck on your Data Lifecycle and Records Management implementation!

THE COMPLEXITY AND EFFORT OF A RETENTION PROJECT

NEXNOVUS

KEY TAKEAWAY?

The 2 major contributing technical[1] factors affecting the complexity, effort and time for your retention project are:

- ✓ The complexity of your retention schedule(s)
- ✓ Your current maturity level across SharePoint and Teams

[1]There are other affecting factors outside of these such as willingness/ability to leverage AI, decision-making authority of the RM team, executive support, etc. that this infographic does not address.

MINIMAL GOVERNANCE ACROSS SHAREPOINT & TEAMS

Examples of poor governance from a retention perspective:
- No approval process for creation/deletion
- Uncontrolled site sprawl ("wild west")
- No metadata anywhere
- No ownership training

Somewhat challenging

You may be able to get away with less automation since the schedule is basic. You will likely run into challenges automating controls across your SP/Teams architecture.

Most challenging

Start by assessing the impact of your retention schedule on your SP/Teams architecture. Buy/build a robust provisioning solution to help with both governance and retention automation.

What can contribute to complexity:
- Ambiguous retention triggers
- Event-based retention
- Disposition review requirements
- Volume of record series/types
- Immutability requirements
- Archiving requirements

BASIC RETENTION SCHEDULE

COMPLEX RETENTION SCHEDULE

Least challenging

Leverage your standardized SP/Teams architecture to automate the retention controls, if required. You may also be able to rely on end-users to understand and apply the right retention label. Maybe.

Somewhat challenging

Most of the time will be spent mapping the retention schedule into your SP/Teams architecture, but because it is already well-governed, this should reduce effort required for this.

DID YOU NOTICE?

THEY ARE **ALL** VARYING DEGREES OF "CHALLENGING"!

ESTABLISHED GOOD GOVERNANCE ACROSS SHAREPOINT & TEAMS

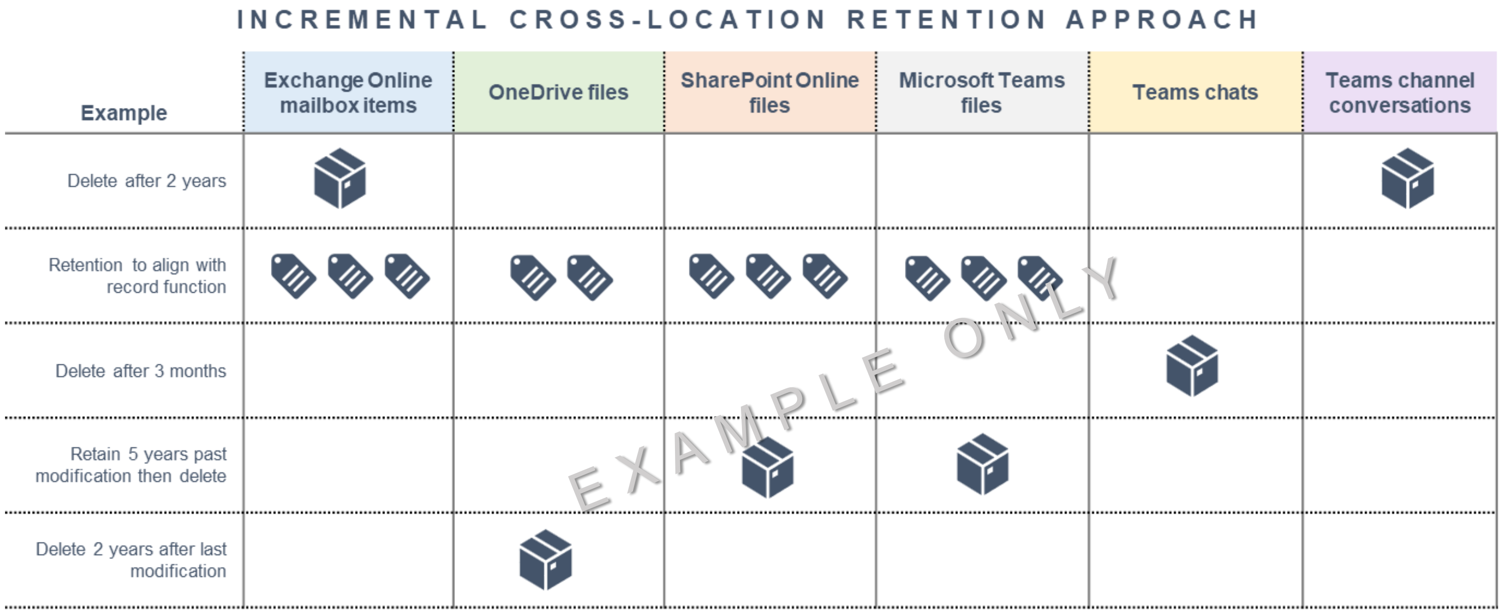
Examples of good governance from a retention perspective:
- Approval process for creation/deletion
- Standard site/team "templates"
- Governed use of metadata where it makes sense
- Management of tenant-level term store and its usage
- Assigned site/team ownership

CONSIDERATIONS & APPROACH FOR PURVIEW RETENTION

RECORDS RETENTION SCHEDUE TO PURVIEW FILE PLAN CONSIDERATIONS	
Assess software readiness	Is your retention schedule ambiguous or is it “software ready”? E.g., Decide how you will trigger retention for each record series and whether it can be automated.
Retention labels are a tenant-wide definition	To avoid potential future re-work, assess the entirety of your retention schedule(s) and how it will map to your File Plan before starting.
Consolidate where possible	There are technical and practical limitations on the number of retention labels. Look for ways to consolidate and simplify your schedule(s) before mapping into the File Plan.
Do not expose users to more labels than are necessary	Limit the number of retention labels published to end-users to minimize manual mislabeling and end-user label fatigue.
Align record categories to information architecture	Establishing an information architecture that aligns with record categories can simplify end-user adoption and provides the opportunity for automation (Functional classification).
Naming conventions	Retention label names and policy names cannot be changed after-the-fact. Choose your names carefully.
Organize	Use the File Plan descriptors (category, subcategory, reference Id, etc.) to organize retention labels across your File Plan.

PRIORITIZE LOCATIONS

Taking a location-based approach for retention controls can provide the opportunity to gradually assess the operational and technical impacts



Take an incremental approach including both retention policies and retention labels. Progress from manual and default to auto-applied over time.

LEGEND:


Retention policy


Retention label

FOUNDATIONAL KNOWLEDGE FOR PURVIEW RETENTION CONTROLS

START BY CHOOSING YOUR RETENTION LABEL TYPES

RETENTION LABEL TYPES

CAPABILITY OF LABEL	STANDARD RETENTION LABEL	RECORD RETENTION LABEL	REGULATORY RECORD RETENTION LABEL
Can prevent document's content from being edited	No	Yes, while it's locked	Yes, always
Can prevent document metadata from being edited	No	Yes, if set at tenant level	Yes, always
Can prevent document from being deleted	Yes, if set at tenant level	Yes, always	Yes, always
Can be manually applied	Yes	Yes	Yes
Can be defaulted	Yes	Yes	Yes **BE CAREFUL!!!!!**
Can be auto-applied	Yes	Yes	No
Can be removed from a document	Yes	Only by a container admin when locked	No
Can be copied within the same container	Yes	Yes	Yes
Can be moved within the same container	Yes	Yes	Yes
Can be moved to another container	Yes	Only if never unlocked	No

**Gray box in table above indicates an advanced license capability*

⚠

A SPECIAL NOTE ABOUT REGULATORY RECORD RETENTION LABELS

RULE 1 : Choose this label type carefully, there's no backing out of this decision

RULE 2 : Doublecheck your label settings - there are only 2 settings that can change after creation:

- Retention label period can **only be extended**
- Label Policy scope locations can **only be added**

RULE 3 : You cannot select a regulatory record label in a replace label action at the end of the retention period

CONFIGURATION INSIGHTS

	RETENTION LABEL (STANDARD & RECORD LABELS)								RETENTION POLICY			RETENTION & LABEL POLICIES		
	Retention Label name ★	Retention Label type	Retention Label period	Retention Label start	Behavior during retention period	Behavior at end of retention period	Disposition Reviewers	Label Policy name ★	Retention Policy name ★	Retention Policy start	Retention Policy period	Scope locations	Policy Scope type	Adaptive Scope name ★
SETTING CAN CHANGE AFTER CREATION	✗	✗	✓ Unless based on labeled date (changing soon)	✗	✗ Except RM tenant settings can change	✗ Except you CAN change replacement label and PA flow	✓	✗	✗	✓	✓	✓	✗	✗
FORMAT / OPTIONS	Max 64 chars a-z, A-Z, 0-9, hyphen, space	Standard, Record, Reg Record	Years, Months, Days, Forever	Created, Last modified, Labeled, Event	Retain if deleted, Mark as a record, Unlock by default	Auto-delete, Start review, Replace label, Run a flow, Stop retention	Users, mail-enabled security groups	Max 64 chars	Max 64 chars	Created, Last modified	Years, Months, Days, Forever	Adaptive scope name or Static locations	Static, Adaptive	Max chars not documented

★ *Establish a naming convention before creating these in the Purview File Plan*

FOUNDATIONAL KNOWLEDGE FOR PURVIEW RETENTION CONTROLS

RETENTION POLICY

APPLIES TO **ALL** CONTENT IN A LOCATION*

RETENTION LABELS

APPLIES TO **INDIVIDUAL ITEMS** IN A LOCATION*

=

Use the Principles of Retention to determine how long an item should be retained for and when it can be deleted based on all retention controls applied to it.

PRINCIPLES OF RETENTION

1. Retention wins over deletion

   Continue only if conflict remains

2. Longest retention period wins

   Continue only if conflict remains

3. Explicit wins over implicit for deletions

   Continue only if conflict remains

4. Shortest deletion period wins

*You can have BOTH a retention policy published to a location and retention labels applied to items within the same location each with different retention and deletion settings.

COMMON MISCONCEPTIONS & TRUTHS

A retention label will NOT automatically take priority over a retention policy for retention duration. The principles of retention must still be followed.

There can be >1 retention policy published to a location and a retention label applied to an item in that same location. This is why the principles of retention are required.

The principles of retention rules are followed regardless of how a retention label was applied to an item (manual, default, or auto-applied).

If there is an eDiscovery hold in effect for a location/item, any deletion actions for the location/item are suspended for the duration of the hold.

FOUNDATIONAL KNOWLEDGE FOR PURVIEW RETENTION CONTROLS

RETENTION LABEL PRIORITY RULES

During Retention Period	RULE 1 (highest)	If an end-user **manually applies** a retention label to a file/email, the label will take precedence over all other methods. This means it will never be overwritten by a default label or an auto-applied label. Ever. Note: a record retention label, however applied, is always considered the highest priority label.
	RULE 2	If a retention label has been set as **default** at a document library or folder level, it will automatically apply a retention label to all documents within that are unlabeled. If there are nested folders, each with their own default retention label set, the items within each folder will inherit the default retention label set at the closest folder level in the hierarchy above. Conversely, removing a retention label set as the **default** from either a document library or folder level will automatically remove the default label from all documents within EXCEPT if the default was a record retention label. Those will remain labeled (see RULE 1). If a document has a default label applied and it's moved into another folder with a different default, the old label will remain on the document. If a document has a default label applied and it' copied into another folder with a different default, the new default will apply to the document.
	RULE 3 (lowest)	An **auto-applied** label is the lowest priority label as it will only apply a retention label if an item doesn't already have a retention label applied. If there are multiple auto-apply label policies, the first policy to run and find a condition match will set the retention label assigned to the label policy on a document if it doesn't already have a retention label applied. NOTE: a Syntex model that has a retention label associated with it is considered an "auto-applied" label with the same priority as an auto-applied label.
At the end of Retention Period	RULE 1 (highest)	If the retention label has been configured to automatically apply a different retention label at the end of the retention period, the new label will overwrite whatever retention label is currently on the file regardless of how it was applied to the file. (unless original label is a regulatory record label)
	RULE 2 (lowest)	If the retention period has been configured with a disposition review, and a disposition reviewer applies a different label during the review process, the new label will overwrite whatever label is currently on the file regardless of how it was applied to the file. (unless original label is a regulatory record label)

HOW RETENTION LABEL IS APPLIED
Manually
Defaulted
Auto-applied

**Gray box is an advanced license capability*

RETENTION LABEL VS SENSITIVITY LABEL

No "priority" order exists on a retention label like it does on a sensitivity label, but the priority rules above apply throughout the data lifecycle.

There can only be 1 retention label (and 1 sensitivity label) on a document/email at a time. This is why priority "rules" are required.

You **cannot** make a retention label required, but you **can** make a sensitivity label required.

Retention labels are published to **locations** and can differ by location. Sensitivity labels are published to **users** regardless of location.

MODERN COMMUNICATION & COLLABORATION

RETENTION LABELS **VS** SENSITIVITY LABELS FOR FILES/EMAILS

A retention label is used to enforce retention/deletion controls on files/emails with disposition actions for regulatory, legal, or business purposes. A sensitivity label is used to classify a file/email to inform data handling and protection controls.

1 LABEL PURPOSE

There can be 1 retention label and 1 sensitivity label on a file/email. There are different rules for when a manual, default, or auto-applied label will be applied for each type of label though.

2 ONLY ONE OF EACH

You cannot make a retention label required; you can make a sensitivity label required. Closest way to make a retention label required is to apply a record retention label since it can only be removed by a site collection admin/site owner.[1]

3 MAKE IT REQUIRED

You can default a retention label for a SharePoint document library, folder, or document set. You can default a sensitivity label for a user, group and a SharePoint document library.

4 DEFAULT THE LABEL

Retention labels are published to Microsoft 365 locations and can differ by location. Sensitivity labels are published to users/groups and can differ by file, email, or container.

5 PUBLISH THE LABEL

A CONTRAST AND COMPARISON

You cannot recommend a retention label; you can recommend a sensitivity label.

6 RECOMMEND THE LABEL

Both a retention label and a sensitivity label can be auto-applied using many techniques. Some techniques are the same such as SITs and Trainable Classifiers.

7 AUTO-APPLY THE LABEL

Changing a sensitivity label to a lower parent label can prompt for a justification. No such justification exists for changing a retention label; however, the change actions for both types of labels are audited in the Unified audit log.

8 JUSTIFY A LABEL CHANGE

Retention labels do not have a multilingual option. Sensitivity labels support multiple languages via PowerShell.

9 MULTILINGUAL LABEL

You cannot change the name of a Retention label once its created in Purview. You can change the display name of a sensitivity label after its created in Purview.

10 CHANGE THE LABEL NAME

[1] A regulatory record label cannot be removed/changed essentially making it “required”, but this type of retention label should be used with extreme caution as it has other effects.

PURVIEW DISPOSITION REVIEW

PERMISSIONS FOR DISPOSITION REVIEWERS

PERMISSIONS	WHAT IT DOES	RECORDS MANAGERS	BUSINESS REVIEWERS
PURVIEW ROLE GROUP: Custom role group PURVIEW ROLE: Disposition Management* **This role is also part of the Records Management role group which Records Managers might already have*	Allows members to access the Purview Records Management/Disposition tab, see the list of their assigned pending dispositions and perform any disposition action on an item. It does not allow reviewers to view an item's content within the mini-preview pane.	Required	Required
+ PURVIEW ROLE GROUP: Content Explorer Content Viewer PURVIEW ROLE: Data Classification Content Viewer	Having this role **in addition to** the Disposition Management role allows a reviewer to view an item's content within the mini-preview pane. **Access to the SPO/OD site is not required	Optional but recommended	Optional but recommended
Mail-enabled security group for Records managers set in Records Management settings	Allows everyone in group to see all pending items assigned to all users across all disposition stages.	Optional but recommended	N/A

LEGEND:
- Required
- Optional but recommended

Required Purview roles to view an item's content in the mini-preview pane and take a disposition action.

DID YOU KNOW?

You don't need access to the SharePoint/OneDrive site where the pending disposition is located to approve the disposition

Adding an additional reviewer "in-the-moment" during the review process does not automatically grant them permission to the disposition page

You can dispose of an item individually or in bulk. You cannot automatically dispose all items part of a "case". You would need to select all items in the "case" to do this.

When all items in a "container" are disposed of, the container remains. A "container" is a site, a library, a folder, or a document set.

M O D E R N   C O M M U N I C A T I O N   &   C O L L A B O R A T I O N

PURVIEW DISPOSITION SCENARIO WORKFLOWS

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NO REVIEW

SCENARIO 1

Labeled file reaches end of retention period with an **automatic delete** action configured on the label.

First-stage recycle bin — If user purges — **93 days combined** — Second-stage recycle bin — Permanent deletion

DISPOSITION REVIEW

Auto-approve deletion after 'X' days of inaction if configured

SCENARIO 2

Labeled file reaches end of retention period with disposition review action configured on the label. Disposition reviewer **approves the deletion**.

Approves delete — (Up to 15 days later) — Second-stage recycle bin for **93 days** — Permanent deletion

SCENARIO 3

Labeled file reaches end of retention period with disposition review action configured on the label. Disposition reviewer **extends the retention period**.

Picks new date

SCENARIO 4

Labeled file reaches end of retention period with disposition review action configured on the label. Disposition reviewer **relabels the file**.

Selects new label

SCENARIO 5

Labeled file reaches end of retention period with disposition review action configured on the label. Disposition reviewer **adds another user** to review file.

Review the file.

Deletion approved, workflow resumes.

User reviews the file and can take the same actions as the disposition reviewer. If approved, the process returns to the disposition reviewer.

AUTOMATIC ACTION

SCENARIO 6

Labeled file reaches end of retention period with "**change the label**" configured on the label. Replacement label is automatically applied.

Up to 7-day delay

Replacement retention label is applied… "Daisy-chaining" retention labels.

SCENARIO 7

Labeled file reaches end of retention period with "**Run a Power Automate flow**" configured on the label. Flow is automatically triggered.

Up to 7-day delay

Power Automate flow executes any custom business logic such as:

- Move file to an archive location
- Send email notifications
- Start custom approval process

Requires a Power Automate per user plan that includes premium connectors, separate from your Microsoft 365 compliance plan

MULTI-STAGE DISPOSITION REVIEWS

2 3 4 5

Scenarios 2 thru 5 can have up to 5 stages of disposition review configured in the label. Only after one of the stage's reviewers approves a deletion (scenario 2) will it advance to the next stage unless auto-approval has been configured* in which case, after a specified # of days, if no action has been taken, the item will automatically be approved for deletion and advance to the next stage.

*Auto-approval is currently in Preview and subject to change.

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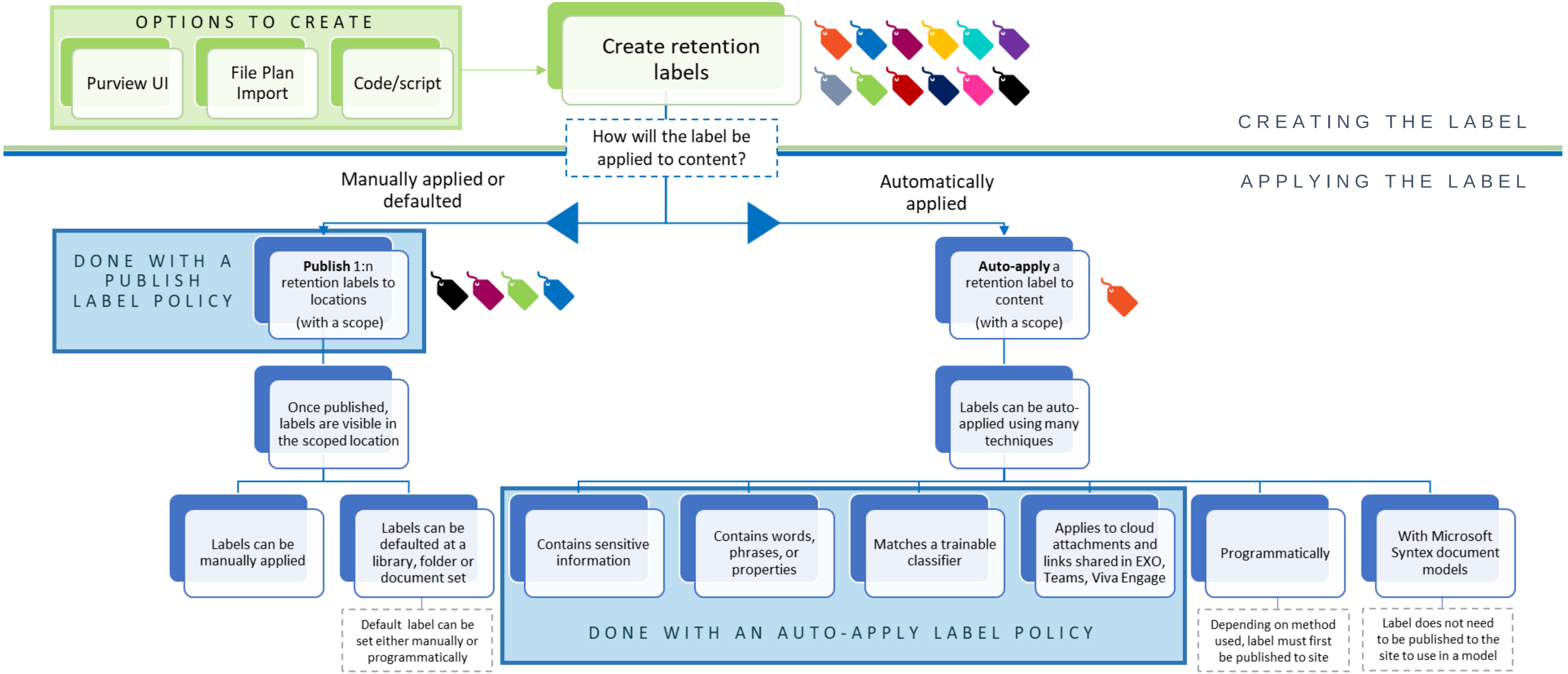
CREATING AND APPLYING RETENTION LABELS



PURVIEW AUTO-APPLY RETENTION LABELS

AUTO-APPLYING A RETENTION LABEL BASED ON SHAREPOINT IA

SHAREPOINT IA & EXAMPLE USE-CASE	1 INFORMATION ARCHITECTURE SETUP[1]	2 SEARCH SCHEMA SETUP[2]	3 KQL QUERY IN AUTO-APPLY LABEL POLICY	4 RESULT (if a label isn't already on the doc)
CONTENT TYPE Auto-apply a **Project** retention label to all Project documents	• Create content type "Project document" • Follow common doc library setup*	• No additional setup required because the Content Type managed property is already created for you! • Validate query*	ContentType:"Project Document"	All docs with a content type of "Project Document" in locations you've scoped the auto-apply policy to will have the **Project** retention label applied
MANAGED METADATA COLUMN Auto-apply a **Financial Info** retention label to all documents with a document type of 'Financial Report'	• Create a tenant-level term set called 'Document Type' and add all document types as terms to it • Create managed metadata site column "DocumentType" and point to the term set above • Follow common doc library setup*	• Map a RefinableString## managed property to automatically generated crawled property, OWS_TAXID_DocumentType • Validate query*	RefinableString##:"Financial Report"	All docs with a document type of "Financial Report" in locations you've scoped the auto-apply policy to will have the **Financial Info** retention label applied
CHOICE COLUMN Auto-apply a **Budget** retention label to all documents with a document type of 'Budget Report'	• Create choice site column "DocumentType" and put all values as choices, including 'Budget Report' • Follow common doc library setup*	• Map a RefinableString## managed property to automatically generated crawled property, OWS_Q_CHCS_DocumentType • Validate query*	RefinableString##:"Budget Report"	All docs with a document type of "Budget Report" in locations you've scoped the auto-apply policy to will have the **Budget** retention label applied
DATETIME COLUMN Auto-apply a **Policy** retention label when a policy expires	• Create DateTime site column 'ExpiryDate' • Follow common doc library setup*	• Map a RefinableDate## managed property to automatically generated crawled property, OWS_Q_DATE_ExpiryDate • Validate query*	RefinableDate##<Today	All docs with an expiry date set in the past in locations you've scoped the auto-apply policy to will have the **Policy** retention label applied
YES/NO COLUMN Auto-apply a **S/O** retention label when a Superseded/Obsolete Yes/No column value is set to 'Yes'	• Create Yes/No site column "Superseded/Obsolete" and default to No • Follow common doc library setup*	• Map a RefinableString## managed property to automatically generated crawled property, OWS_Superseded/Obsolete • You could also use RefinableInt## and check for value of 1 • Validate query*	RefinableString##=True	All docs with a Superseded/Obsolete column set to Yes in locations you've scoped the auto-apply policy to will have the **S/O** retention label applied

[1]IA setup can be done at the tenant-level in the Content Type Hub to make the content types and site columns available to any site on the tenant.
[2]You must be a SharePoint Administrator to do these steps - (~/_layouts/15/searchadmin/TA_SearchAdministration.aspx)

COMMON DOC LIBRARY SETUP

1. Add Content Type and/or site columns to library
2. Add/update content in the library: set custom Content Type on some docs, update at least 1 doc with metadata
3. Initiate re-index of library to create/update the crawled and managed properties required for your KQL query

VALIDATE QUERY

1. Initiate re-index of SP site to populate the Refinable managed property in the search index
   - *Site settings… Search… Search and offline availability*
2. Validate your KQL query by entering it in Content Search or the Microsoft Search box

FOUNDATIONAL KNOWLEDGE FOR PURVIEW RETENTION

SHAREPOINT ONLINE GUIDELINES FOR RECORDS MANAGEMENT

GUIDELINES TO FOLLOW	BUILD A MODERN SHAREPOINT SITE AND INFORMATION ARCHITECTURE	CONSIDER A PROVISIONING PROCESS TO AUTOMATE SOME OF YOUR COMPLIANCE CONTROLS	MAP RETENTION SCHEDULE TO YOUR SHAREPOINT SITE AND INFORMATION ARCHITECTURE	EMBRACE AI AND ML TO SCALE COMPLIANCE ACROSS YOUR DIGITAL WORKPLACE	EXECUTE BOTH A PROOF-OF-CONCEPT (POC) AND PILOT(S)	INCLUDE BUSINESS DATA STEWARDSHIP AS A SITE OWNER RESPONSIBILITY
WHY IT'S IMPORTANT	"This is a good idea for many reasons, including compliance. Many compliance capabilities rely on it"	"A provisioning process mitigates the risk of site sprawl and can also automate some compliance controls rather than relying on manual ones"	"SharePoint architecture directly impacts how you apply your retention controls. Involve your SharePoint admins"	"Digital records in SharePoint require a modern approach for compliance, including AI and ML techniques"	"A POC and pilot(s) are both necessary steps in an enablement strategy and serve two very different purposes"	"We are all data stewards of business records we create and can help scale records management at the grass roots level"

DID YOU KNOW?

A flat (no subsite) SharePoint architecture is recommended because you cannot publish retention labels/retention policies to a subsite, they can ONLY be published to a site collection (will include ALL subsites within it which you may not want).

A Proof-of-Concept (POC) is typically done in a non-production environment and is used to showcase the technology and provides the opportunity to assess any impacts/gaps for your organization.

A Pilot is typically executed in a production environment. A well-planned and executed Pilot can help to define a "recipe" to extend the deployment holistically across the organization while allowing for variances. You can have more than 1 pilot and most organizations do.

MODERN COMMUNICATION & COLLABORATION

FOUNDATIONAL KNOWLEDGE FOR PURVIEW RETENTION

SHAREPOINT ONLINE GUIDELINES FOR RECORDS MANAGEMENT

	BUILD A MODERN SHAREPOINT SITE AND INFORMATION ARCHITECTURE	CONSIDER A PROVISIONING PROCESS TO AUTOMATE SOME OF YOUR COMPLIANCE CONTROLS	MAP RETENTION SCHEDULE TO YOUR SHAREPOINT SITE AND INFORMATION ARCHITECTURE	EMBRACE AI AND ML TO SCALE COMPLIANCE ACROSS YOUR DIGITAL WORKPLACE	EXECUTE BOTH A PROOF-OF-CONCEPT (POC) AND PILOT(S)	INCLUDE BUSINESS DATA STEWARDSHIP AS A SITE OWNER RESPONSIBILITY
	GUIDELINES TO FOLLOW					
SOME PRACTICAL STEPS TO TAKE	• Turn off the ability to create subsites at the tenant level • Create all new sites as modern • Define a migration strategy for legacy sites For RM automation: • Leverage the tenant level term store for terms to use them for columns to auto-apply retention labels • Leverage the Content Type Gallery in the SP Admin Center for consistent metadata and content types across tenant	Build a provisioning process for new collaboration Sites and Teams Some things to consider during provisioning to help with compliance: ▪ Site URL/Site name ▪ SPO site properties ▪ Auto-assign metadata ▪ Auto-publish retention policy ▪ Auto-publish retention labels ▪ Set default retention label on library	To help with automation, look for ways to map the retention labels in your retention schedule to leverage your SP site and information architecture such as: ▪ Metadata for auto-apply labels ▪ Metadata for event-based retention ▪ Site properties for auto-apply labels and policies (adaptive scopes) ▪ M365 Group properties for auto-apply labels and policies (adaptive scopes)	• Assess the accuracy of the pre-built trainable classifiers for your tenant data using Content Explorer • Consider custom trainable classifiers • Look for alignment of trainable classifiers to your retention requirements • Use the (free) Syntex Assessment tool to look for places where Syntex may help apply compliance controls automatically to your content • Monitor M365 roadmap for new AI capabilities (such as Copilot)	POC: • Include capabilities required across your entire retention schedule • Execute in a **non-prod** tenant for least impact • Document learnings • Assess any impacts/gaps for your organization Pilot(s): • Pick pilots representative of the capabilities you require • Execute in **prod** tenant in controlled location(s) • Prepare/update training based on feedback • Begin to define a “recipe” for a holistic deployment across the organization	• Establish the business data stewardship role at the site owner level • Make site owner training part of the provisioning process. It should include how to manage business records created thru the SharePoint site lifecycle, including shutting down a site.

MICROSOFT TEAMS AND COMPLIANCE

Teams Content		Where it's stored	Location to select for your Retention Policy	Location to select for your Retention Label
1:1 and Group Chats	Files	OneDrive for Business account of the person who shared the file	Pick the OneDrive URL for person the policy applies to	Pick the OneDrive URL for person the policy applies to
	Chats	Compliance copies of chats are stored in the Exchange Online mailbox of ALL chat participants.	Pick the "Teams chat" location and select the user(s) the policy applies to	N/A - You can't apply retention labels to Teams chats
STANDARD Channel	Files	SharePoint site for the Team (*~/sites/[Name of Microsoft Team]*)	PowerShell if you want it ONLY to apply to the files and NOT the channel messages: *Set-RetentionCompliancePolicy –Applications Group:SharePoint*	Pick the "Microsoft 365 Group" location and target the Team name
	Channel messages	Compliance copies of messages are stored in the Group mailbox associated to the Team	Pick the "Teams channel messages" location and select the Team name (does NOT include private channel messages, will cover any shared channel messages within Team)	N/A - You can't apply retention labels to Teams channel messages
PRIVATE Channel	Files	SharePoint site* of Team's private channel (*~/sites/[Name of parent team]-[Name of private channel]*)	PowerShell if you want it ONLY to apply to the files and NOT the channel messages: *Set-RetentionCompliancePolicy –Applications Group:SharePoint*	Enter the URL to the Private Channel's SharePoint site
	Channel messages	ALL Private Channel members' mailboxes (Compliance copies of messages are stored in each members' mailbox) ***Use PowerShell to get list of private channel members*	Pick the "Teams private channel messages" location and select the user(s) the policy applies to	N/A - You can't apply retention labels to Teams channel messages
SHARED Channel	Files	SharePoint site* of Team's shared channel (*~/sites/[Name of parent team]-[Name of shared channel]*)	Enter the URL to the Shared Channel's SharePoint site	Enter the URL to the Shared Channel's SharePoint site
	Channel messages	Compliance copies of messages are stored in a dedicated system (cloud-only) mailbox associated with the Shared channel	Pick the Teams channel message location. This will automatically include any shared channels for the Team.	N/A - You can't apply retention labels to Teams channel messages

*It can take up to 16 days beyond the retention period for Teams chats to be permanently deleted due to back-end processes.

Compliance copies of Teams Chats and Channel messages are stored in Exchange mailboxes and that is where compliance controls work against.

If a user is included in an active retention policy that retains Team messages and you delete the user, their mailbox is automatically converted into an **inactive mailbox** to ensure the content is retained for the remainder of the retention period.

MODERN COMMUNICATION & COLLABORATION

PURVIEW AUDIT ACTIVITY FOR RETENTION CONTROLS