

AN OVERVIEW OF RECORDS MANAGEMENT IN OFFICE 365

Erica Toelle

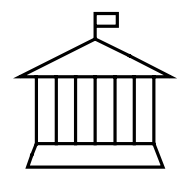


WHAT WE WILL COVER TODAY

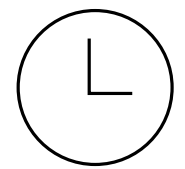
The Records Management Lifecycle



Import and manage a file plan



Categorize content according to your file plan



Types of retention: manual, automatic, event-based



Disposition reviews and approval



COMPLIANCE LICENSING

E3/G3/A3

- Office 365 E3
- Microsoft 365 E3

CORE

E5/G5/A5/Add-on Pack

- Advanced Compliance Add-on
- Office 365 E5
- Microsoft 365 E5 Information Protection & Governance
- Microsoft 365 E5 Compliance
- Microsoft 365 E5

ADVANCED

[Detailed Compliance Licensing Information](#)



IMPORT AND MANAGE A FILE PLAN



FILE PLAN MANAGER

File plan manager provides advanced management and organizational capabilities for retention labels and retention label policies.

Contoso Electronics
Microsoft 365 compliance
🔍 ⚙️ ? 👤

Records management 🗑 Remove from navigation

File plan Label policies Events Disposition

Whether starting from scratch or an existing file plan, Microsoft 365 file plan uses advanced analytics and insights to help automate your retention schedules throughout the content lifecycle. Our Excel template lets you quickly fill out your file plan so you can collaborate with stakeholders on your retention label strategy. When ready, simply upload the completed plan to Microsoft 365 then publish or auto-apply the labels to see them in action.

+ Create a label ▼ ↑ Import ↓ Export ↻ Refresh						37 items	🔍 Search	☰ Group by ▼	⚙ Customize columns
Name ↑	Status	Based on	Is record	Retention duration	Disposition type	Reference ID	Function/departme...	Category	Subcategory
Benefit Information	Inactive	When created	No	10 days	No Action	HR.105	HR	Employees	
Budget	Inactive	When created	No	10 days	No Action	F.104	Finance	Finance	
Confidential	Active	When created	No	7 years	Review required				
Contract Over \$1M	Inactive	Event	No	7 days	Auto-delete	HR.303	HR	Employment	
Contract over 50k	Inactive	When created	No	10 days	No Action	F.100	Finance	Finance	
Contract under 50k	Inactive	When created	No	10 days	No Action	F.101	Finance	Finance	
Discipline Materials	Inactive	When created	No	10 days	No Action	HR.103	HR	Employees	
Earnings report	Inactive	When created	No	10 days	No Action	F.102	Finance	Finance	
Employee Offer Letter	Inactive	When created	No	10 days	No Action	HR.102	HR	Employees	



FILE PLAN DESCRIPTORS

- Reference ID
- Business Function/Department
- Category
- Sub-category
- Authority type
- Provision/citation

Create a label to help users classify their content.

☒ Name your label

☐ File plan descriptors

☐ Label settings

☐ Review your settings

File plan descriptors

Based on conditions you set below, we'll automatically apply this label to content. Users will see the label applied to their content that matches your specified conditions. ⓘ

Reference Id
Enter a reference Id or create a new one

Business function/department
Select a business function/department or create a new one

Category
Compliance

Subcategory
Select a subcategory or create a new one

Authority type
Select an authority type or create a new one

Provision/citation
Select a provision/citation or create a new one

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

FILE PLAN CUSTOMIZE COLUMN OPTIONS

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Records management (preview)

File plan

Label policies

Events

Disposition

Whether starting from scratch or an existing file plan, Microsoft 365 file plan uses advanced analytics and insights to help automate your lifecycle. Our Excel template lets you quickly fill out your file plan so you can collaborate with stakeholders on your retention label strategy. Publish your file plan to Microsoft 365 then publish or auto-apply the labels to see them in action.

+ Create a label

↑ Import

↓ Export

↻ Refresh

37 items

Name ↑	Status	Based on	Is record	Retention duration	Disposition type	Reference ID
Benefit Information	Inactive	When created	No	10 days	No Action	HR.105
Budget	Inactive	When created	No	10 days	No Action	F.104
Confidential	Active	When created	No	7 years	Review required	
Contract Over \$1M	Inactive	Event	No	7 days	Auto-delete	HR.303
Contract over 50k	Inactive	When created	No	10 days	No Action	F.100
Contract under 50k	Inactive	When created	No	10 days	No Action	F.101
Discipline Materials	Inactive	When created	No	10 days	No Action	HR.103
Earnings report	Inactive	When created	No	10 days	No Action	F.102
Employee Offer Letter	Inactive	When created	No	10 days	No Action	HR.102

Customize columns

☒ Name

☒ Status

☒ Based on

☒ Is record

☒ Retention duration

☒ Disposition type

☒ Reference ID

☒ Function/department

☒ Category

☒ Subcategory

☐ Authority type

☐ Provision/citation

☐ Created date

☐ Created by

☒ Last modified

☒ Last modified by

Apply

Cancel



FILE PLAN VIEW OPTIONS

- Sort by any column
- Search the file plan
- Group by function /department, status, or category

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Records management (preview) [Remove from navigation](#)

[File plan](#) [Label policies](#) [Events](#) [Disposition](#)

Whether starting from scratch or an existing file plan, Microsoft 365 file plan uses advanced analytics and insights to help automate your retention schedules throughout the content lifecycle. Our Excel template lets you quickly fill out your file plan so you can collaborate with stakeholders on your retention label strategy. When ready, simply upload the completed plan to Microsoft 365 then publish or auto-apply the labels to see them in action.

+ Create a label ☐ Import ☐ Export ☐ Refresh

5 items project

Name	Status	Based on	Is record	Retention duration ↑	Disposition type	Reference ID	Function	Subcategory
Project Email	Active	Event	No	1 month	Auto-delete		None	
Project Deliverable	Active	Event	No	3 years	Review required		Function/department	
Project Falcon	Inactive	When created	No	7 days	Review required		Status	
Project Falcon Record	Inactive	When created	No	7 days	Review required		Category	
Project Contract	Active	Event	No	7 years	Review required			



BULK CREATE LABELS WITH EXPORT AND IMPORT

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Name	Status	Based on	Is record	Retention duration	Disposition type	Reference ID	Function/departmen	Category	Subcategory	Authority type	Provision/citation	Created date	Created by	Last modified
2	Benefit Information	Inactive	When created	No	10 days	No Action	HR.105	HR	Employees		Legal		2019-10-04T18:29:04.000Z	Allan Deyoung	2019-10-04T18:29:04.000Z
3	Budget	Inactive	When created	No	10 days	No Action	F.104	Finance	Finance		Regulatory	Sarbanes-Oxley Act of 2002	2019-10-04T18:29:04.000Z	Allan Deyoung	2019-10-04T18:29:04.000Z
4	Confidential	Active	When created	No	7 years	Review required							2019-09-01T15:53:53.000Z	Megan Bowen	2019-09-01T15:53:53.000Z
5	Contract Over \$1M	Inactive	Event	No	7 days	Auto-delete	HR.303	HR	Employment		Business		2019-10-04T18:29:04.000Z	Allan Deyoung	2019-10-04T18:29:04.000Z
6	Contract over 50k	Inactive	When created	No	10 days	No Action	F.100	Finance	Finance		Regulatory	Sarbanes-Oxley Act of 2002	2019-10-04T18:29:03.000Z	Allan Deyoung	2019-10-04T18:29:03.000Z
7	Contract under 50k	Inactive	When created	No	10 days	No Action	F.101	Finance	Finance		Regulatory	Sarbanes-Oxley Act of 2002	2019-10-04T18:29:04.000Z	Allan Deyoung	2019-10-04T18:29:04.000Z
8	Discipline Materials	Inactive	When created	No	10 days	No Action	HR.103	HR	Employees		Business		2019-10-04T18:29:03.000Z	Allan Deyoung	2019-10-04T18:29:03.000Z
9	Earnings report	Inactive	When created	No	10 days	No Action	F.102	Finance	Finance		Regulatory	Sarbanes-Oxley Act of 2002	2019-10-04T18:29:04.000Z	Allan Deyoung	2019-10-04T18:29:04.000Z
10	Employee Offer Letter	Inactive	When created	No	10 days	No Action	HR.102	HR	Employees		Business		2019-10-04T18:29:03.000Z	Allan Deyoung	2019-10-04T18:29:03.000Z
11	Employee Records	Active	When created	Yes	Forever	No Action							2019-09-01T15:54:02.000Z	Megan Bowen	2019-09-01T15:54:02.000Z
12	Employee Review	Inactive	When created	No	10 days	No Action	HR.101	HR	Employees		Business		2019-10-04T18:29:04.000Z	Allan Deyoung	2019-10-04T18:29:04.000Z
13	Exchange Retention Policy	Inactive	When created	No	2 years	Auto-delete	RC.102	Operations	Compliance		Legal	Sarbanes-Oxley Act of 2002	2019-10-04T18:29:04.000Z	Allan Deyoung	2019-10-04T18:29:04.000Z
14	Filing Data	Inactive	When created	No	10 days	No Action	F.103	Finance	Finance		Regulatory	Sarbanes-Oxley Act of 2002	2019-10-04T18:29:04.000Z	Allan Deyoung	2019-10-04T18:29:04.000Z
15	Health Plan	Inactive	When created	No	10 days	No Action	HR.104	HR	Employees		Business		2019-10-04T18:29:04.000Z	Allan Deyoung	2019-10-04T18:29:04.000Z
16	Invoice	Inactive	Last modified	No	30 years	Auto-delete	F.201	Finance	Accounts payable		Regulatory		2019-10-04T18:29:04.000Z	Allan Deyoung	2019-10-04T18:29:04.000Z
17	Keep Forever	Inactive	Label applied	No	Forever	No Action							2019-10-04T18:29:04.000Z	Allan Deyoung	2019-10-04T18:29:04.000Z
18	Marketing One Sheet	Inactive	When created	No	3 days	No Action	M.102	Marketing	Product Marketing		Business		2019-10-04T18:29:03.000Z	Allan Deyoung	2019-10-04T18:29:03.000Z
19	Medical Records Retention Policy	Active	When created	No	7 years	No Action							2019-09-01T15:54:37.000Z	Megan Bowen	2019-09-01T15:54:37.000Z
20	No Retention	Inactive		No	None	Auto-delete							2019-10-04T18:29:03.000Z	Allan Deyoung	2019-10-04T18:29:03.000Z
21	One Day Retention	Active	When created	No	1 day	Review required							2019-10-10T22:28:58.000Z	Allan Deyoung	2019-10-10T22:28:58.000Z
22	Personal Financial PII	Active	When created	No	3 years	Auto-delete							2019-09-01T15:54:02.000Z	Megan Bowen	2019-09-01T15:54:02.000Z
23	PII Retention Policy	Active	When created	No	7 years	No Action	Legal-2019	Legal	Commercial transactions		Legal		2019-09-01T15:54:41.000Z	Megan Bowen	2019-09-02T00:00:00.000Z
24	Private	Inactive	When created	No	5 years	Review required	Private101	Strategy developmen	Business		Business		2019-09-01T15:20:05.000Z	Megan Bowen	2019-09-02T00:00:00.000Z
25	Product Marketing Materials	Inactive	Last modified	No	1 year	No Action	M.101	Marketing	Marketing		Business		2019-10-04T18:29:04.000Z	Allan Deyoung	2019-10-04T18:29:04.000Z
26	Product Retired	Active	Event	No	10 years	Review required	SAL1300	Sales and Marketing	Sales / Marketing		Business		2019-09-01T15:54:03.000Z	Megan Bowen	2019-09-02T00:00:00.000Z
27	Project Contract	Active	Event	No	7 years	Review required							2019-11-10T21:11:27.000Z	Allan Deyoung	2019-11-10T21:11:27.000Z
28	Project Deliverable	Active	Event	No	3 years	Review required							2019-11-10T21:39:13.000Z	Allan Deyoung	2019-11-10T21:39:13.000Z
29	Project Email	Active	Event	No	1 month	Auto-delete							2019-11-10T21:40:50.000Z	Allan Deyoung	2019-11-10T21:40:50.000Z
30	Project Falcon	Inactive	When created	No	7 days	Review required							2019-10-04T18:29:04.000Z	Allan Deyoung	2019-10-04T18:29:04.000Z
31	Project Falcon Record	Inactive	When created	No	7 days	Review required							2019-10-04T18:29:04.000Z	Allan Deyoung	2019-10-04T18:29:04.000Z
32	Public	Active	When created	No	5 years	No Action							2019-09-01T15:54:01.000Z	Megan Bowen	2019-09-01T15:54:01.000Z
33	Records Center After	Inactive	When created	Yes	1 day	No Action	RC.103	Operations	Compliance		Legal	Sarbanes-Oxley Act of 2002	2019-10-04T18:29:03.000Z	Allan Deyoung	2019-10-04T18:29:03.000Z
34	Records Center Before	Inactive	When created	Yes	1 day	Auto-delete	RC.105	Operations	Compliance		Legal	Sarbanes-Oxley Act of 2002	2019-10-04T18:29:04.000Z	Allan Deyoung	2019-10-04T18:29:04.000Z
35	RecordsCenterBefore	Inactive	When created	No	3 days	No Action	RC.101	Operations	Compliance		Legal	Sarbanes-Oxley Act of 2002	2019-10-04T18:29:04.000Z	Allan Deyoung	2019-10-04T18:29:04.000Z
36	Resume Classifier Test	Inactive		No	None	Auto-delete							2019-11-10T04:51:25.000Z	Allan Deyoung	2019-11-10T04:51:25.000Z
37	Stock Awards	Inactive	When created	No	10 days	No Action	HR.106	HR	Employees		Legal		2019-10-04T18:29:04.000Z	Allan Deyoung	2019-10-04T18:29:04.000Z
38	Two Day Policy	Inactive	Label applied	No	2 days	Auto-delete	RC.104	Operations	Compliance		Legal	Sarbanes-Oxley Act of 2002	2019-10-04T18:29:04.000Z	Allan Deyoung	2019-10-04T18:29:04.000Z
39															



EXPORTED FILE PLAN INFORMATION

CSV COLUMN NAME	LABEL DESCRIPTOR	POSSIBLE VALUES
Name	Retention label name	Any text
Status	Whether the label is currently applied to content	Active or Inactive (automatic)
Based on	What triggers the retention period	When created, When modified, Event, When labeled
Is record	Is the label a record?	Yes or No
Retention	The duration of the retention period	Days, Months, Years, or Forever
Disposition type	What happens when the retention period is over	No action, Review required, Auto-delete
Reference	Label descriptor information	Any text
Function/Department	Label descriptor information	Any text
Category	The category of the retention label	Any text
Subcategory	The subcategory of the retention label	Any text
Authority	Why you created the label	Any text, typically Business, Legal, or Regulatory
Provision/citation	The provision of citation associated with the label	Any text
Created date	The created date of the label	Cannot be edited (Automatic)
Created by	The name of the person that created the label	Cannot be edited (Automatic)
Modified date	The date the label was last modified	Cannot be edited (Automatic)
Modified by	Who last modified the label	Cannot be edited (Automatic)



EXPORT AND IMPORT THE FILE PLAN

Fill out and import your file plan

● Import

Fill out and import your file plan

Follow these steps to populate your file plan with retention labels and their related settings, then upload the completed plan to put your labels to work.

1. Download and fill out the file plan template (CSV format) [Download a blank template](#)
2. Fill out your file plan by adding new retention labels or editing existing ones. [Get tips on how to fill out the template](#)
3. Kick off the import process by locating the completed plan.
[Browse for files...](#)
4. When the import is complete, put your file plan into action by returning to the 'File plan' page to publish or auto-apply your retention labels.

⚙ File plan actions ▾

Create a label

Publish labels

Auto-apply a label

Import labels

Export labels

Next

Cancel

VIEW THE LIFECYCLE OF LABEL CONTENT

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Microsoft 365 compliance

Records management (preview)

File plan

Label policies

Events

Disposition

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+ Create a label

Import

Export

Refresh

Name	Status	Based on	Is record	Retention duration
One Day Retention	Active	When created	No	1 day
Records Center After	Inactive	When created	Yes	1 day
Records Center Before	Inactive	When created	Yes	1 day
Project Email	Active	Event	No	1 month
Product Marketing Materials	Inactive	Last modified	No	1 year
Benefit Information	Inactive	When created	No	10 days
Budget	Inactive	When created	No	10 days
Contract over 50k	Inactive	When created	No	10 days
Contract under 50k	Inactive	When created	No	10 days

One Day Retention

Edit label

Publish label

Auto-apply a label

Delete label

Explore items

Name

One Day Retention

Description for admins

Edit

Description for users

Edit

File plan descriptors

Edit

Retention

1 day

Preserve, review and delete

Based on when it was created

Reviewers

Edit

Close



VIEW LABEL ACTIVITY

- View label activity
- See a summary of locations where the label is used

One Day Retention

Activity Items with this label Pending disposition Disposed items

Items with this label by locations

438 I...

Exchange



219

SharePoint



214

OneDrive for Business



5

FILE PLAN VIEW OPTIONS

- Browse label locations
- View SharePoint sites and OneDrive accounts
- See Exchange email accounts.
- View individual files or emails

One Day Retention

Activity Items with this label Pending disposition Disposed items

Filters		Exchange		Subject/Title	URL
SharePoint and OneDrive for Business		Location name Count		Your Azure AD Identity Protection Weekly Digest	Open item
Exchange		<input checked="" type="checkbox"/> Allan Deyoung 103		Your Azure AD Identity Protection Weekly Digest	Open item
		Megan Bowen 101		<input type="radio"/> Your Azure AD Identity Protection Weekly Digest	Open item
		Lidia Holloway 6		Your Azure AD Identity Protection Weekly Digest	Open item
		Isaiah Langer 4		Your Azure AD Identity Protection Weekly Digest	Open item
		Adele Vance 4		Your Azure AD Identity Protection Weekly Digest	Open item
		Irvin Sayers 3		You now have Audio Conferencing for Microsoft Teams or Skype for Busines...	Open item
		Nestor Wilke 2		You have been added to a team in Microsoft Teams	Open item
		1 item selected. 7 items loaded.		You have been added to a team in Microsoft Teams	Open item

CATEGORIZE CONTENT ACCORDING TO YOUR FILE PLAN



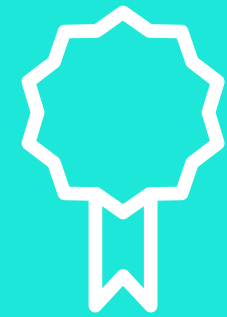
RETENTION LABELS VERSUS RETENTION POLICIES

	RETENTION LABELS	RETENTION POLICIES
Apply Retention	X	X
Event-Based Retention	X	
Manage SharePoint, OneDrive, Groups, Exchange Email Content	X	X
Manage Microsoft Teams, Skype for Business, Exchange Public Folders Content		X
Manage Content as a [finalized] Record	X	
Apply Based on Sensitive Information	X	X
Apply Based on Specific Words and Phrases	X	X
Granularity to Specific Documents	X	



WHAT IF CONTENT QUALIFIES FOR MORE THAN ONE RETENTION PERIOD?

The principles of retention



Retention wins over deletion



Longest retention period wins



Explicit inclusion wins over implicit inclusion



Shortest deletion period wins

CORE



CREATE A RETENTION LABEL

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Microsoft 365 compliance

Home

Compliance score

Alerts

Reports

Policies

Permissions

Solutions

Catalog

Information protection

Data loss prevention

Records management

Information governance

Data subject requests

Content search

eDiscovery

Records management

Remove from navigation

File plan

Label policies

Events

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+ Create a label

Import

Export

Refresh

33 items

Search

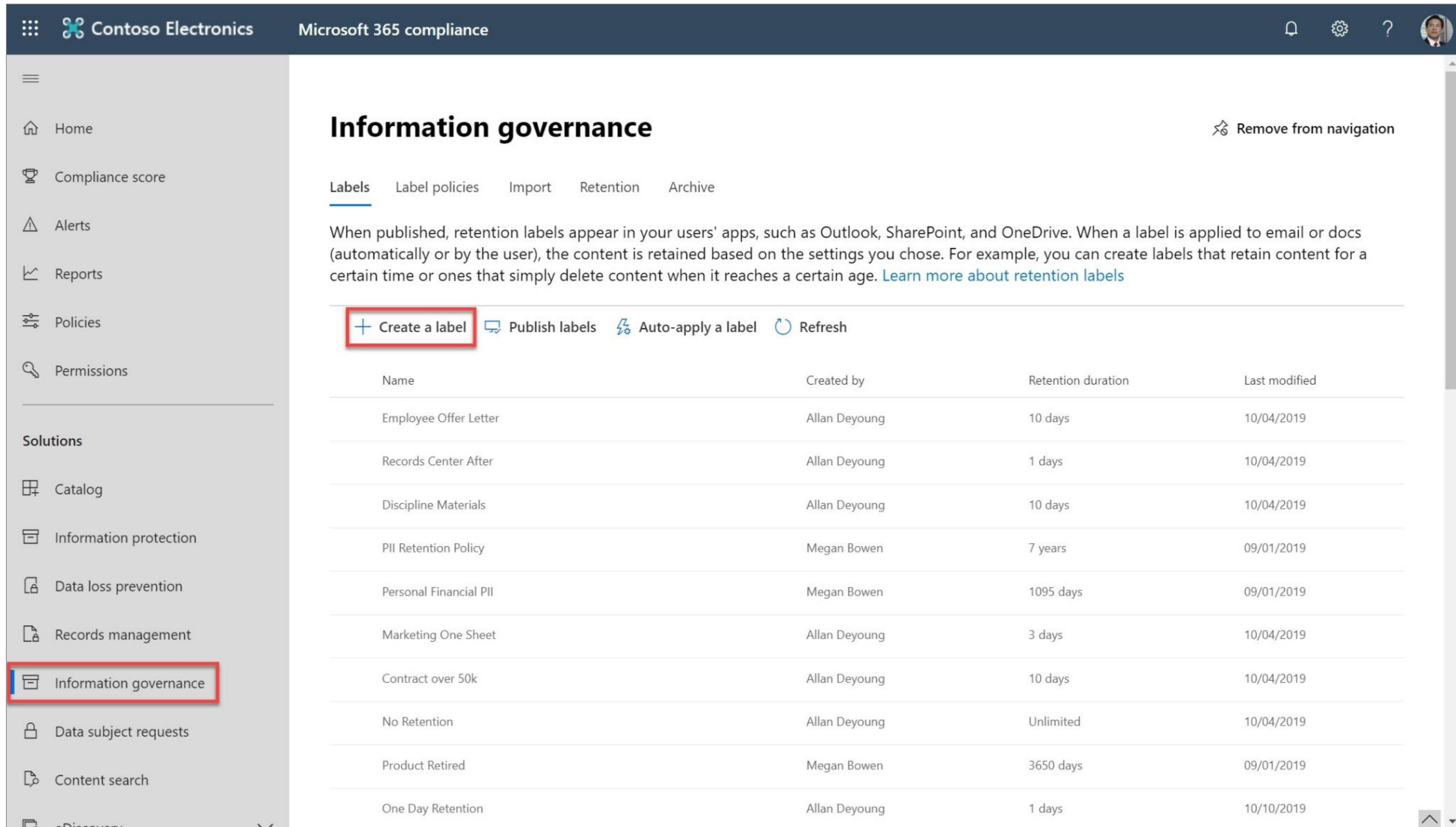
Group by

Customize columns

Name	Status	Based on	Is record	Retention duration	Disposition type	Reference ID	Function/department
Benefit Information	Inactive	When created	No	10 days	No Action	HR.105	HR
Budget	Inactive	When created	No	10 days	No Action	F.104	Finance
Confidential	Active	When created	No	7 years	Review required		
Contract Over \$1M	Inactive	Event	No	7 days	Auto-delete	HR.303	HR
Contract over 50k	Inactive	When created	No	10 days	No Action	F.100	Finance
Contract under 50k	Inactive	When created	No	10 days	No Action	F.101	Finance
Discipline Materials	Inactive	When created	No	10 days	No Action	HR.103	HR
Earnings report	Inactive	When created	No	10 days	No Action	F.102	Finance
Employee Offer Letter	Inactive	When created	No	10 days	No Action	HR.102	HR



CREATE A RETENTION LABEL



Contoso Electronics Microsoft 365 compliance

Information governance [Remove from navigation](#)

Labels Label policies Import Retention Archive

When published, retention labels appear in your users' apps, such as Outlook, SharePoint, and OneDrive. When a label is applied to email or docs (automatically or by the user), the content is retained based on the settings you chose. For example, you can create labels that retain content for a certain time or ones that simply delete content when it reaches a certain age. [Learn more about retention labels](#)

[+ Create a label](#) [Publish labels](#) [Auto-apply a label](#) [Refresh](#)

Name	Created by	Retention duration	Last modified
Employee Offer Letter	Allan Deyoung	10 days	10/04/2019
Records Center After	Allan Deyoung	1 days	10/04/2019
Discipline Materials	Allan Deyoung	10 days	10/04/2019
PII Retention Policy	Megan Bowen	7 years	09/01/2019
Personal Financial PII	Megan Bowen	1095 days	09/01/2019
Marketing One Sheet	Allan Deyoung	3 days	10/04/2019
Contract over 50k	Allan Deyoung	10 days	10/04/2019
No Retention	Allan Deyoung	Unlimited	10/04/2019
Product Retired	Megan Bowen	3650 days	09/01/2019
One Day Retention	Allan Deyoung	1 days	10/10/2019



NAME YOUR LABEL

Add a name and description:

- Make the Name specific, e.g., Financial Contracts 3-year retention
- Add a detailed description that only admins will see
- Add a description for end users that will allow them to differentiate this from other labels

Name your label

Name * ⓘ

Description for admins ⓘ

Description for users ⓘ

Next Cancel

LABEL SETTINGS

Options for Label Settings Include:

- Turn retention on or off
- Set the retention time period
- Act after the retention period is over:
 - Delete content automatically
 - • Trigger a disposition review
 - Do nothing
- Do not retain content – delete it if it is older than a time period
- Set a trigger for the retention period
- Choose to have the label classify content as a record

Label settings

Retention ⓘ
☒ On

When this label is applied to content...

☒ Retain the content ⓘ

For this long... ▼ 7 years ▼

What do you want to do after this time?

☐ Delete the content automatically. ⓘ

☐ Trigger a disposition review. ⓘ

☒ Nothing. Leave the content as is. ⓘ

☐ Don't retain the content. Just delete it if it's older than ⓘ

1 years ▼

Retain or delete the content based on when it was created ⓘ

Label classification

☐ Use label to classify content as a "Record" ⓘ



PUBLISH A RETENTION LABEL

The screenshot shows the Microsoft 365 compliance center interface for Contoso Electronics. The left sidebar contains navigation links for Home, Compliance score, Alerts, Reports, Policies, Permissions, and Solutions (Catalog, Information protection, Data loss prevention, Records management, Information governance, Data subject requests, Content search, eDiscovery). The main area is titled 'Records management' and includes tabs for File plan, Label policies, Events, and Disposition. A descriptive paragraph explains the file plan and retention label strategy. Below this is a table of labels with columns for Name, Status, Based on, and Is retained. The 'Benefit Information' label is selected, indicated by a red box around the checkmark icon. To the right, the 'Benefit Information' pane is open, showing buttons for Edit label, Publish label (highlighted with a red box), Auto-apply a label, Delete label, and Explore items. The pane also displays the label's Name, Description for admins, Description for users, File plan descriptors, and Retention settings.

Records management

File plan | Label policies | Events | Disposition

Whether starting from scratch or an existing file plan, Microsoft 365 file plan schedules throughout the content lifecycle. Our Excel template lets you quickly create a retention label strategy. When ready, simply upload the completed plan to the compliance center.

+ Create a label | Import | Export | Refresh

Name	Status	Based on	Is retained
<input checked="" type="checkbox"/> Benefit Information	Inactive	When created	No
Budget	Inactive	When created	No
Confidential	Active	When created	No
Contract Over \$1M	Inactive	Event	No
Contract over 50k	Inactive	When created	No
Contract under 50k	Inactive	When created	No
Discipline Materials	Inactive	When created	No
Earnings report	Inactive	When created	No
Employee Offer Letter	Inactive	When created	No

Benefit Information

Edit label | **Publish label** | Auto-apply a label

Delete label | Explore items

Name
Benefit Information

Description for admins [Edit](#)

Description for users [Edit](#)

File plan descriptors [Edit](#)
Reference Id: HR.105
Business function/department: HR
Category: Employees
Authority type: Legal

Retention [Edit](#)
10 days
Retain only

[Close](#)



PUBLISH A RETENTION LABEL

The screenshot shows the Microsoft 365 compliance center interface. The left sidebar contains navigation links: Home, Compliance score, Alerts, Reports, Policies, Permissions, Solutions, Catalog, Information protection, Data loss prevention, Records management, Information governance (selected), Data subject requests, Content search, and eDiscovery. The main content area is titled 'Information governance' and includes a 'Remove from navigation' link. Below the title are tabs for 'Labels', 'Label policies' (highlighted with a red box), 'Import', 'Retention', and 'Archive'. A descriptive paragraph explains that published retention labels appear in users' apps and are retained based on settings. Below this is a row of actions: '+ Create a label', 'Publish labels' (highlighted with a red box), 'Auto-apply a label', and 'Refresh'. A table lists existing retention labels with columns for Name, Created by, Retention duration, and Last modified.

Name	Created by	Retention duration	Last modified
Employee Offer Letter	Allan Deyoung	10 days	10/04/2019
Records Center After	Allan Deyoung	1 days	10/04/2019
Discipline Materials	Allan Deyoung	10 days	10/04/2019
PII Retention Policy	Megan Bowen	7 years	09/01/2019
Personal Financial PII	Megan Bowen	1095 days	09/01/2019
Marketing One Sheet	Allan Deyoung	3 days	10/04/2019
Contract over 50k	Allan Deyoung	10 days	10/04/2019
No Retention	Allan Deyoung	Unlimited	10/04/2019
Product Retired	Megan Bowen	3650 days	09/01/2019
One Day Retention	Allan Deyoung	1 days	10/10/2019



PUBLISH A RETENTION LABEL POLICY

Can be deployed to specific locations or the entire organization

ALL LOCATIONS				
Entire Locations	SHAREPOINT	ONEDRIVE FOR BUSINESS	GROUPS	EXCHANGE EMAIL
	UP TO 100 SITES	UP TO 1000 ACCOUNTS	UP TO 100 GROUPS	UP TO 1000 RECIPIENTS

Up to 10,000 retention label policies per tenant



CREATE A RETENTION POLICY

The screenshot shows the Microsoft 365 compliance center interface. The top navigation bar includes the Contoso Electronics logo, the text "Microsoft 365 compliance", and icons for notifications, settings, help, and a user profile. The left sidebar contains a navigation menu with options: Home, Compliance score, Alerts, Reports, Policies, Permissions, Solutions, Catalog, Information protection, Data loss prevention, Records management, Information governance (highlighted with a red box), Data subject requests, Content search, and eDiscovery. The main content area is titled "Information governance" and includes a "Remove from navigation" link. Below the title are tabs for Labels, Label policies, Import, Retention (highlighted with a red box), and Archive. A descriptive paragraph explains the purpose of retention policies. Below this is a toolbar with a "+ New retention policy" button (highlighted with a red box), an "Export" button, a "Refresh" button, and an "Inactive mailbox" button. To the right of the toolbar, it shows "8 items" and a search icon. A table lists the existing retention policies with columns for Name, Created by, and Last modified.

Name	Created by	Last modified
<input type="radio"/> Employee Records	Megan Bowen	September 1, 2019 8:54 AM
Medical Records Retention Policy	Megan Bowen	September 1, 2019 8:54 AM
One Day Retention - Everywhere	Allan Deyoung	October 10, 2019 3:30 PM
Personal Financial PII	Megan Bowen	September 1, 2019 8:54 AM
PII Retention Policy	Megan Bowen	September 1, 2019 8:54 AM
Product Retirement	Allan Deyoung	September 1, 2019 5:21 PM
Sensitivity	Megan Bowen	September 1, 2019 8:54 AM
U.S. Financial Data Policy	Megan Bowen	September 1, 2019 8:54 AM

<https://compliance.microsoft.com/informationgovernance>



NAME YOUR POLICY

Add a Name and Description:

- Make the Name specific, e.g., Financial Contracts 3-year retention
- Add a detailed description that only admins will see

Name your policy

Name * ⓘ

Description

Next

Cancel



CREATE A RETENTION POLICY: CONFIGURE SETTINGS

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

Do you want to retain content? [i](#)

☒ Yes, I want to retain it [i](#)

For this long... years

Retain the content based on [i](#)

Do you want us to delete it after this time? [i](#)

☐ Yes ☒ No

☐ No, just delete content that's older than [i](#)

years

Need more options?

☐ Use advanced retention settings [i](#)

Back

Next

Cancel

Options for Settings Include:

- Decide whether you would like to retain or delete the content.
 - If only delete, set the time period.
 - If retention, set the time period and trigger date.
 - Once the retention period has passed decide whether content should be deleted.
- Choose whether to use advanced retention settings

CREATE A RETENTION POLICY: CHOOSE LOCATIONS

EXCHANGE EMAIL AND PUBLIC FOLDERS, SHAREPOINT, ONEDRIVE, AND OFFICE 365 GROUPS								
Entire Locations	EXCHANGE EMAIL	SHAREPOINT	ONEDRIVE FOR BUSINESS	GROUPS	SKYPE FOR BUSINESS	EXCHANGE PUBLIC FOLDERS	TEAMS CHANNEL MESSAGES	TEAMS CHATS
Include or Exclude	UP TO 1000 RECIPIENTS	UP TO 100 SITES	UP TO 1000 ACCOUNTS	UP TO 100 GROUPS	UP TO 1000 ACCOUNTS	UP TO 1000 ACCOUNTS	UP TO 100 TEAMS	UP TO 1000 ACCOUNTS

Up to 10,000 retention policies per tenant

CORE



TYPES OF RETENTION



OPTIONS TO RETAIN DATA IN OFFICE 365

CORE

RETENTION POLICY

GENERAL RETENTION

Apply a retention policy to broad locations, such as all SharePoint sites or a specific site.



ADVANCED

AUTO-CLASSIFY

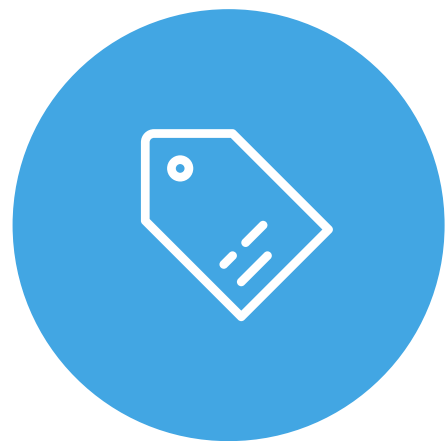
Automatically apply retention labels to specific content.



CORE

MANUALLY CLASSIFY

Allow end users to manually classify content with retention labels.



ADVANCED

EVENT-BASED

Use built-in or custom classifiers to identify specific types of info and items in your organization.



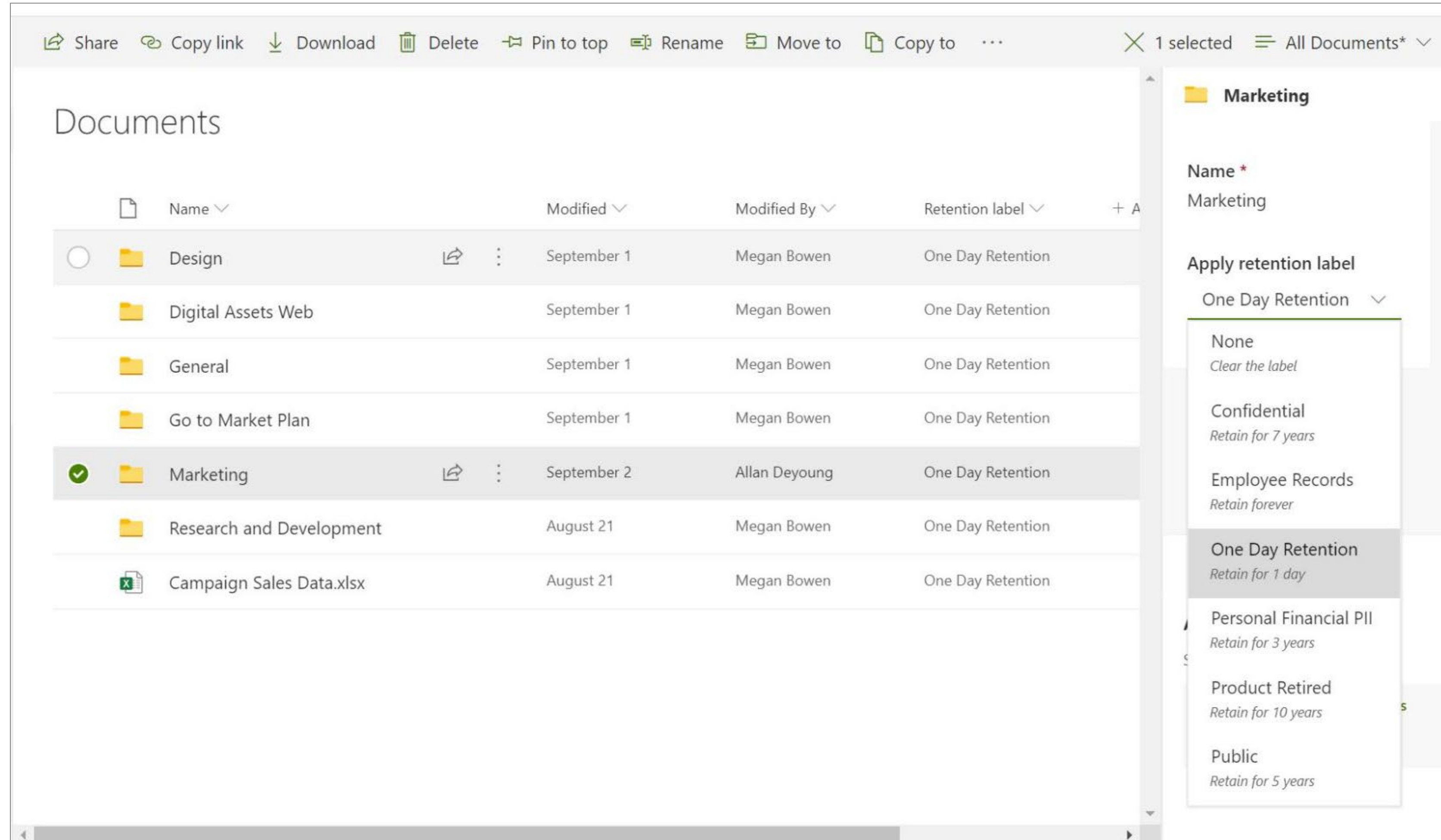
RETENTION LABEL



MANUALLY APPLY A RETENTION LABEL: FILES

For SharePoint, OneDrive, and Group files content, any user in the default Members group (the Edit permission level) can apply a label to content

For Exchange, users can apply to their own email



The screenshot displays the 'Documents' library in a Microsoft 365 application. The top navigation bar includes actions like Share, Copy link, Download, Delete, Pin to top, Rename, Move to, and Copy to. The main area shows a list of documents with columns for Name, Modified, Modified By, and Retention label. The 'Marketing' folder is selected, and a dropdown menu is open, showing the 'Apply retention label' options. The dropdown menu includes 'None', 'Confidential', 'Employee Records', 'One Day Retention', 'Personal Financial PII', 'Product Retired', and 'Public'.

Name	Modified	Modified By	Retention label
Design	September 1	Megan Bowen	One Day Retention
Digital Assets Web	September 1	Megan Bowen	One Day Retention
General	September 1	Megan Bowen	One Day Retention
Go to Market Plan	September 1	Megan Bowen	One Day Retention
Marketing	September 2	Allan Deyoung	One Day Retention
Research and Development	August 21	Megan Bowen	One Day Retention
Campaign Sales Data.xlsx	August 21	Megan Bowen	One Day Retention

Apply retention label

- None
Clear the label
- Confidential
Retain for 7 years
- Employee Records
Retain forever
- One Day Retention**
Retain for 1 day
- Personal Financial PII
Retain for 3 years
- Product Retired
Retain for 10 years
- Public
Retain for 5 years

APPLY A RETENTION LABEL TO A DOCUMENT LIBRARY

ADVANCED

Contoso Electronics

Documents

Settings

Home

Conversations

Documents

Notebook

Pages

Recent

Site Assets

Site contents

Recycle Bin

List Information

Name: Documents

Web Address: https://m365x172465.sharepoint.com/sites/Mark8ProjectTeam/Shared Documents/Forms/AllItems.aspx

Description:

General Settings

List name, description and navigation

Versioning settings

Advanced settings

Validation settings

Column default value settings

Audience targeting settings

Rating settings

Form settings

Columns

A column stores information about each document in the document library. The following columns are currently available in this document library:

Column (click to edit)	Type	Required
Title	Single line of text	
Modified	Date and Time	
Created	Date and Time	

Permissions and Management

Permissions for this document library

Manage files which have no checked in version

Workflow Settings

Apply label to items in this list or library

Enterprise Metadata and Keywords Settings

Communications

RSS settings





ADVANCED





AUTOMATICALLY APPLY RETENTION LABELS


Automatically apply a label to content


 Choose label to auto-apply

 Choose conditions


 Settings


 Name your policy


 Locations

 Review your settings

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 

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

AUTO-APPLY BASED ON SENSITIVE INFORMATION TYPES

ADVANCED

Use 100 built-in or custom sensitive data types to auto-apply labels to SharePoint, OneDrive, Exchange (all mailboxes only).

- Choose a sensitive information type.
- When the sensitive information pattern is found, it will apply the retention label.

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 ⓘ


Back Next Cancel


Select from a template


Just tell us what kind of information you want to detect.

Show options for All countries or regions ▼

 Financial

 Medical and health

 Privacy

 Custom

Australia Financial Data

Canada Financial Data

France Financial Data

Germany Financial Data

Canada Financial Data

Description

Helps detect the presence of information commonly considered to be financial data in Canada, including bank account numbers and credit cards.

Protects this information:

- Credit Card Number
- Canada Bank Account Number



AUTO-APPLY BASED ON A SEARCH QUERY

Use Keyword Query Language (KQL) to auto-apply labels to content in Exchange, SharePoint, OneDrive, and Office 365 Groups.

- Apply a label to content that contains specific words, phrases, or values of searchable properties.
- Refine your query by using search operators like AND, OR, and NOT.

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 ⓘ

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

Detect content that matches this query: ×

^ Conditions

We'll apply this policy to content that matches these conditions. ⓘ

Keyword query editor

site:https://contoso.sharepoint.com/sites/finance AND contenttype:invoice



AUTO-APPLY BASED ON A SEARCH QUERY

Choose from the built-in and custom classifiers that are available to use in your organization.

- Leverages machine teaching to learn what a type of content looks like.
- Microsoft has six built-in classifiers.
- You can create a custom classifier for your organization.

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 ⓘ

Back

Next

Cancel

Choose a trainable classifier

Choose from the built-in and custom classifiers that are available to use in your organization.

i

Can't find a custom classifier that you just published? Publishing a new classifier can take a while, so you might need to cancel this wizard and start the process over after verifying that the classifier is ready to use.
Need a different classifier? [Create a new one](#)

Name	Publisher
<input type="radio"/> Offensive Language	Microsoft
<input type="radio"/> Resumes	Microsoft
<input type="radio"/> Source Code	Microsoft
<input type="radio"/> Targeted Harassment	Microsoft
<input type="radio"/> Profanity	Microsoft
<input type="radio"/> Threat	Microsoft

Back

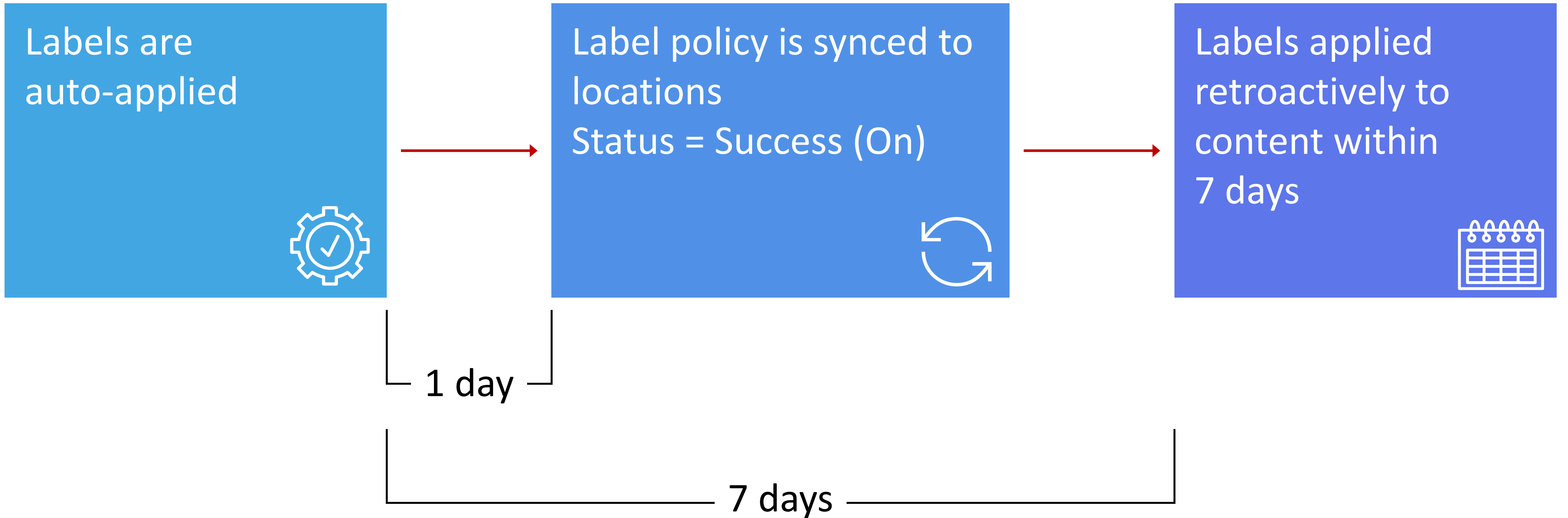
Next

Cancel



7 DAYS TO APPLY A RETENTION LABEL RETROACTIVELY

ADVANCED



EVENT-BASED RETENTION

What is an event? Why do I need event-based retention?

Types of events:

An employee leaving an organization

A contract expiring

A product reaches end of life

When an event occurs, retention policies on documents often change depending on the nature of the specific event

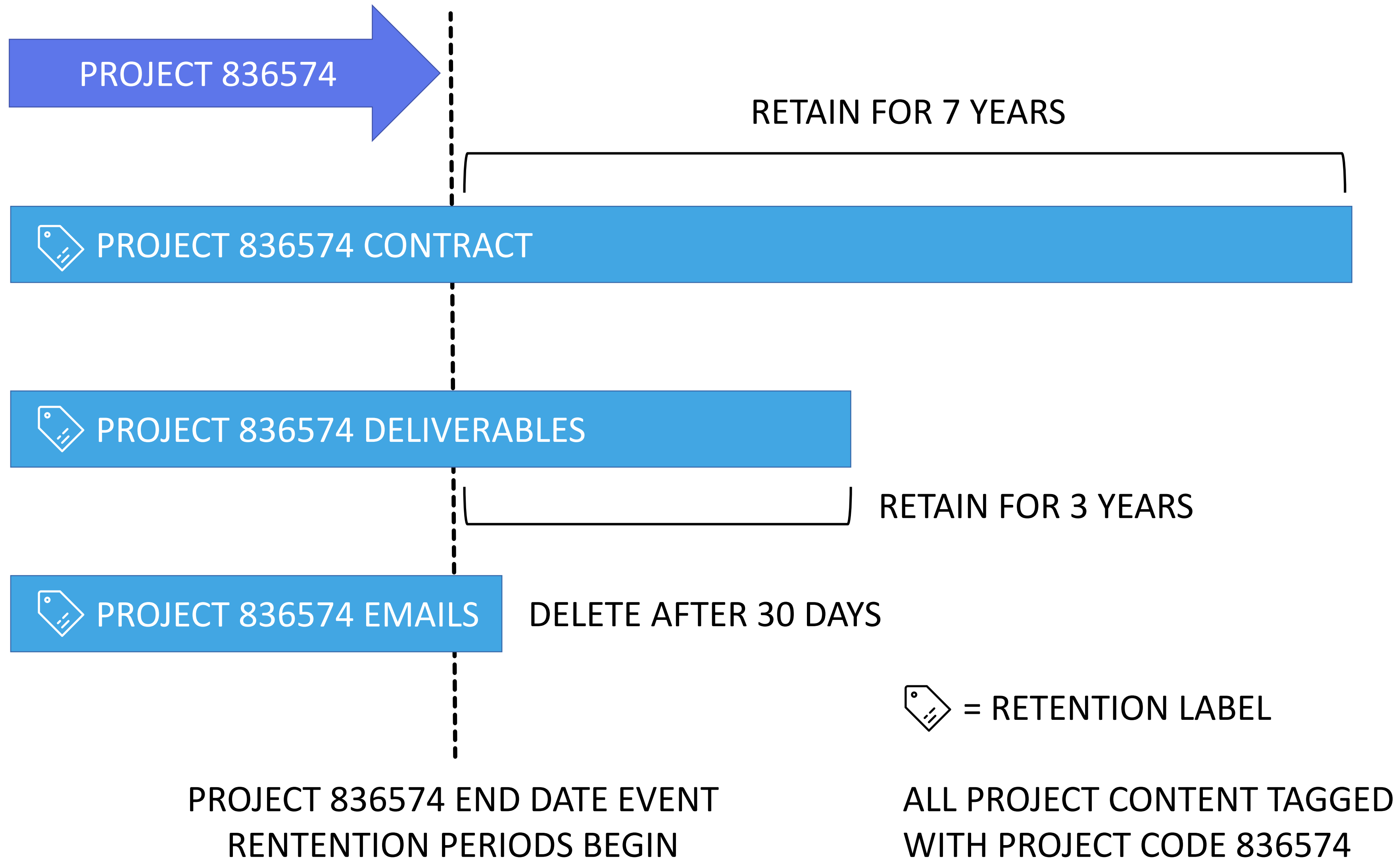
Example: when an employee joins an organization, the retention policy on their employment contract is permanent, but once they leave the retention policy changes to 7 years from the date of departure.

Frequency of events demands automation

Use event-based retention to give employees opportunity to initiate the process & automate the application of the retention change

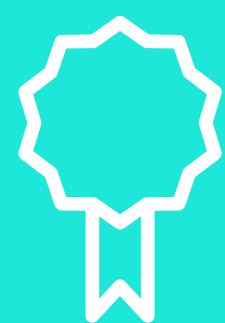


PROJECT SCENARIO WITH EVENT-BASED RETENTION



EVENT-BASED RETENTION

How do I enable event-based retention?



Create a retention label and choose event type



Publish label and add event ID to content



Create and trigger the event

CREATE A RETENTION LABEL WITH AN EVENT TYPE

- Create a new retention label
- On the Label settings screen, select the drop down next to Retain or delete the content based on
- Choose an event
- Create a label for each type of content, e.g., contract, deliverable, email

Create a label to help users classify their content.

- ✓ Name your label
- ✓ File plan descriptors
- Label settings**
- Review your settings

Label settings

Retention ⓘ

☒ On

When this label is applied to content...

☒ Retain the content ⓘ

For this long... 7 years

What do you want to do after this time?

☐ Delete the content automatically. ⓘ

☒ Trigger a disposition review. ⓘ

Notify these people when there are items ready to review

☐ Nothing. Leave the content as is. ⓘ

☐ Don't retain the content. Just delete it if it's older than ⓘ

1 years

Retain or delete the content based on an event ⓘ

Content that has this label applied will be associated with the type of event you choose. When there's a specific occurrence of this event type, you'll create the actual event to start the retention process. ⓘ

Event type: Project End Date

[Edit](#)

Label classification

☐ Use label to classify content as a "Record" ⓘ

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

WHEN THE EVENT OCCURS, MAKE A NEW EVENT

- Click on the Records management solution
- Click the Events tab
- Click Create

The screenshot displays the Microsoft 365 Records Management interface. On the left is a navigation pane with a 'Records management' solution highlighted. The main area shows the 'Events' tab selected, with a description of events and a table of existing events. The 'Create' button is highlighted in the top action bar.

Records management Remove from navigation

File plan Label policies **Events** Disposition

An event is a specific occurrence of a predefined event type. Event types are associated with labels that, when applied to content, classify the content as that specific type. If an actual event occurs, such as a user leaves your organization, you'll create an event for that situation by specifying the event type (such as 'Employment ended'), the date the user left, and the IDs associated with the user's labeled content (such as their employee ID). [Learn more about events](#)

+ Create Manage event types Export Refresh 1 item Search

Name	Last modified	Event date
Mark8	September 1, 2019 5:29 PM	September 6, 2019 12:00 AM

CREATE A RETENTION LABEL WITH AN EVENT TYPE

- Create a new retention label.
- On the Label settings screen, select the drop down next to Retain or delete the content based on.
- Choose An event.
- Create a label for each type of content, e.g., contract, deliverable, email

Create a label to help users classify their content.

- ✓ Name your label
- ✓ File plan descriptors
- Label settings**
- Review your settings

Label settings

Retention ⓘ

☒ On

When this label is applied to content...

☒ Retain the content ⓘ

For this long... 7 years

What do you want to do after this time?

☐ Delete the content automatically. ⓘ

☒ Trigger a disposition review. ⓘ

Notify these people when there are items ready to review

☐ Nothing. Leave the content as is. ⓘ

☐ Don't retain the content. Just delete it if it's older than ⓘ

1 years

Retain or delete the content based on an event ⓘ

Content that has this label applied will be associated with the type of event you choose. When there's a specific occurrence of this event type, you'll create the actual event to start the retention process. ⓘ

Event type: Project End Date


[Edit](#)

Label classification

☐ Use label to classify content as a "Record" ⓘ

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

COMPLETE THE ASSET ID



Mark 8 Project Team

Public group

★ Following

👤 19 members

Home

Conversations

Documents

Shared with us

Notebook

Pages

Bugs

Contracts

Site contents

Recycle bin

Edit

📄 Open

🔗 Share

🔗 Copy link

⬇️ Download

🗑️ Delete

📌 Pin to top

🔄 Rename

⋮

✕ 1 selected

☰ All Documents

🔍

ℹ️

↗️

Documents > Design

📄	Name	Retention label	Created	Created By	Se
📄	bearing-44DDF-stress-test.xlsx	Employee Records	September 1, 2019	Megan Bowen	Ge
📄	marketing-initiatives-FY17.xlsx	Employee Records	September 1, 2019	Megan Bowen	Hi
📄	Usability Testing Priorities.docx	🔒 EU Contract	September 1, 2019	Megan Bowen	
📄	XT1050 Marketing Collateral Timelines_V...	🔒 EU Contract	September 1, 2019	Megan Bowen	
📄	XT1050 Specification.docx	Product Marketing Materials	March 25	Erica Toelle	Hi
✅	📄 XT1050 Usability test 2.3.docx	🔗 ⋮ Product Retired	September 1, 2019	Megan Bowen	Co

📄 XT1050 Usability test 2.3.docx

XT1050 Usability Test 2.3

Project Phase Requirements

Fiscal Year Enter value here

Apply retention label Product Retired

Asset ID 12345

Saving

Show or hide columns

HOW TO AUTOMATE EVENT-BASED RETENTION

APPLY LABEL

- Auto-apply the label based on content properties.
- Auto-apply the labels based on classifier
- Configure a default document library label

ADD ASSET ID

- Configure a custom column in SharePoint with a default value for each document library.
- Automate using Microsoft Flow.

EVENT CREATION

- REST APIs with:
- Microsoft Flow
 - PowerShell or HTTP client to call REST API

DISPOSTION REVIEW AND APPROVAL



CREATE A RETENTION LABEL WITH A DISPOSITION REVIEW

ADVANCED

- Turn on retention
- Select Tigger a disposition review
- Enter the people who should do the review
- Reviewers can be individual users, distribution or security groups, or Office 365 groups
- Best practice is to NOT use an individual name.
- Only one person needs to approve disposal

Create a label to help users classify their content.

✓ Name your label

✓ File plan descriptors

● Label settings

● Review your settings

Label settings

Retention ⓘ

☒ On

When this label is applied to content...

☒ Retain the content ⓘ

For this long... 1 days

What do you want to do after this time?

☐ Delete the content automatically. ⓘ

☒ Trigger a disposition review. ⓘ

Notify these people when there are items ready to review

admin@M365x172465.OnMicrosoft.com X

☐ Nothing. Leave the content as is. ⓘ

☐ Don't retain the content. Just delete it if it's older than ⓘ

1 years

Retain or delete the content based on when it was created ⓘ

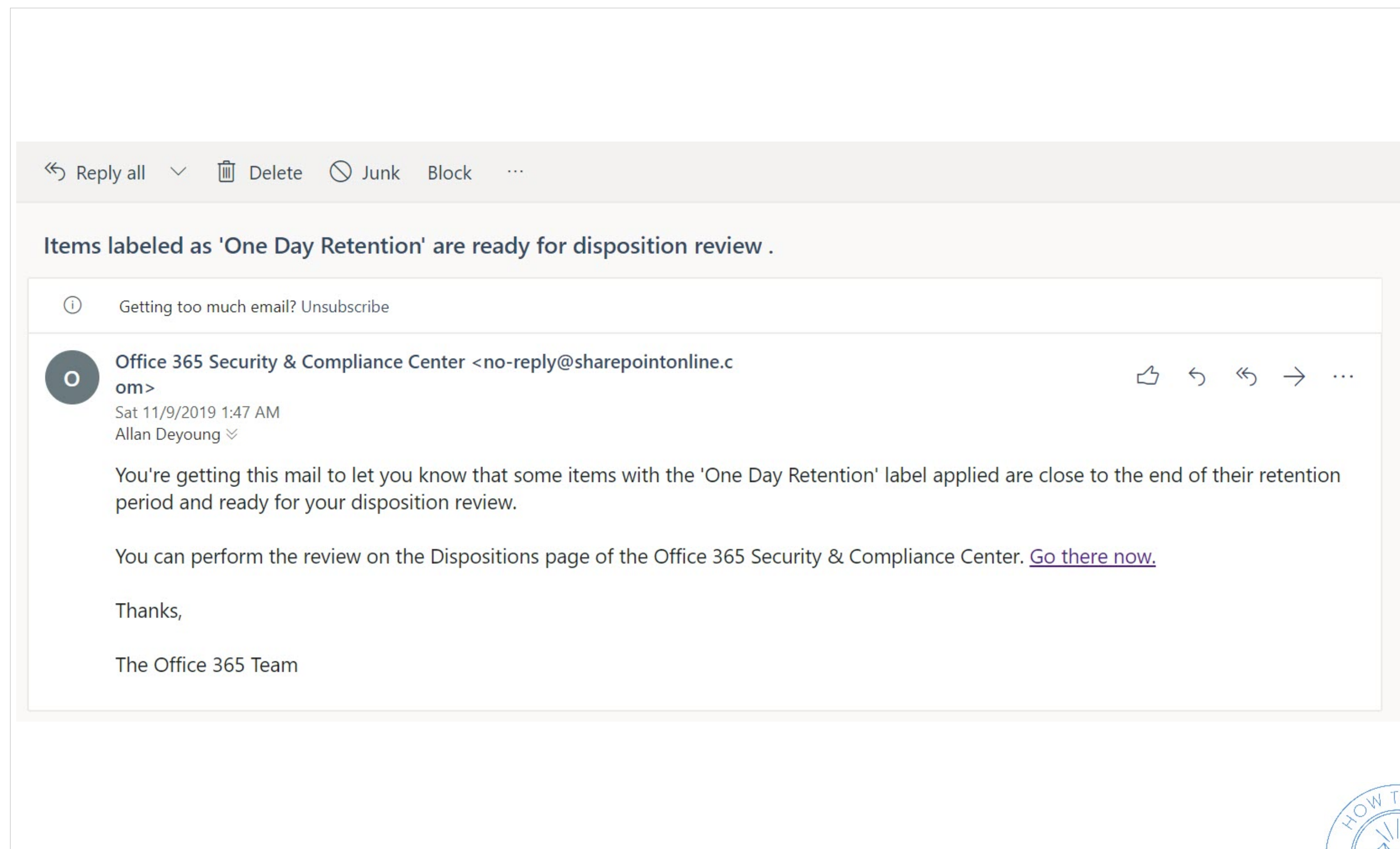
Back Next Cancel

Need help? Feedback



DISPOSITION REVIEW EMAIL

- Once a week reviewers will be notified that they have items ready for disposition review
- The link in the email will take them to the disposition view



DISPOSITION PAGE

- The view is tailored to the reviewer.
- It shows the total number of items that are pending review.

[illegible]

VIEW ITEMS PENDING DISPOSITION

- Filter items by type, start or end date
- Search across all items
- Act on items to dispose, extend retention, or relabel
- Export a list of all items to a .csv

One Day Retention

Activity Items with this label **Pending disposition** Disposed items

Dispose Extend Relabel Export

Filters

Type

Emails Documents Emails

Start date

Select a date...

End date

Select a date...

Clear filters

	Name	Location	Actions
<input checked="" type="checkbox"/>	Your Azure AD Identity Protect...	https://outlook.office365.com/owa/?ItemID=A...	ac
<input checked="" type="checkbox"/>	Your Azure AD Identity Protect...	https://outlook.office365.com/owa/?ItemID=A...	ac
<input type="checkbox"/>	Your Azure AD Identity Protect...	https://outlook.office365.com/owa/?ItemID=A...	ac
<input type="checkbox"/>	Your Azure AD Identity Protect...	https://outlook.office365.com/owa/?ItemID=A...	ac
<input type="checkbox"/>	You now have Audio Conferen...	https://outlook.office365.com/owa/?ItemID=A...	ac
<input type="checkbox"/>	You have been added to a tea...	https://outlook.office365.com/owa/?ItemID=A...	ac
<input type="checkbox"/>	You have been added to a tea...	https://outlook.office365.com/owa/?ItemID=A...	ac

2 items selected. 12 items loaded.

Review

Finalize decision

Comment

Dispose from Office 365

Extend retention

Relabel

EXPORTED ITEMS FOR DISPOSAL REPORT

	A	B	C	D	E	F	G	H	I	J
1	AuthorOrSender	Location	TitleOrSubject	RecordType	TagName	LabelAppliedBy	LabelAppliedDate	ExpiryDate		
2	admin@m365x172465.onmicrosoft.com	https://m365x172465.sharepoint.com/sites/Commerce	Lending proposal Process	pptx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T17:54:09.0000000Z	2019-10-15T08:33:04.0000000Z		
3	jonis@m365x172465.onmicrosoft.com	https://m365x172465.sharepoint.com/sites/Commerce	FY Budget Projection.xlsx	xlsx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T19:29:00.0000000Z	2019-10-15T08:33:04.0000000Z		
4	admin@m365x172465.onmicrosoft.com	https://m365x172465.sharepoint.com/sites/Commerce	Contoso Lending Proposal.docx	docx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T17:54:09.0000000Z	2019-10-15T08:33:04.0000000Z		
5	admin@m365x172465.onmicrosoft.com	https://m365x172465.sharepoint.com/sites/Commerce	Q3 and Q4 Expense Trends By Month.xls	xlsx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T17:54:09.0000000Z	2019-10-15T08:33:03.0000000Z		
6	admin@m365x172465.onmicrosoft.com	https://m365x172465.sharepoint.com/sites/Commerce	FY Budget Projection.xlsx	xlsx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T17:54:09.0000000Z	2019-10-15T08:33:02.0000000Z		
7	admin@m365x172465.onmicrosoft.com	https://m365x172465.sharepoint.com/sites/Commerce	Financial Regulations.docx	docx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T17:54:09.0000000Z	2019-10-15T08:33:02.0000000Z		
8	admin@m365x172465.onmicrosoft.com	https://m365x172465.sharepoint.com/sites/Commerce	Annual Financial Report.docx	docx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T17:54:09.0000000Z	2019-10-15T08:33:01.0000000Z		
9	admin@m365x172465.onmicrosoft.com	https://m365x172465.sharepoint.com/sites/Commerce	Contoso Purchasing Permissions.docx	docx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T17:54:09.0000000Z	2019-10-15T08:33:01.0000000Z		
10	admin@m365x172465.onmicrosoft.com	https://m365x172465.sharepoint.com/sites/Commerce	PowerPoint Presentation	pptx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T17:54:09.0000000Z	2019-10-15T08:32:56.0000000Z		
11	admin@m365x172465.onmicrosoft.com	https://m365x172465.sharepoint.com/sites/Commerce	Commercial Loan Rates 2018.xlsx	xlsx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T17:54:09.0000000Z	2019-10-15T08:32:54.0000000Z		
12	admin@m365x172465.onmicrosoft.com	https://m365x172465.sharepoint.com/sites/Commerce	CONTOSO FINANCIAL - 4252D.docx	docx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T17:54:09.0000000Z	2019-10-15T08:32:53.0000000Z		
13	admin@m365x172465.onmicrosoft.com	https://m365x172465.sharepoint.com/sites/Commerce	Credit Card Info.docx	docx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T17:54:09.0000000Z	2019-10-15T08:32:53.0000000Z		
14	admin@m365x172465.onmicrosoft.com	https://m365x172465.sharepoint.com/sites/pwa/Nor	Welcome to Excel	xlsx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T17:40:41.0000000Z	2019-10-15T08:32:52.0000000Z		
15	admin@m365x172465.onmicrosoft.com	https://m365x172465.sharepoint.com/sites/pwa/Nor	Step by Step Tutorials for Microsoft Inte	doc	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T17:40:21.0000000Z	2019-10-15T08:32:52.0000000Z		
16	admin@m365x172465.onmicrosoft.com	https://m365x172465.sharepoint.com/sites/pwa/Nor	Test Plan	xlsx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T17:40:32.0000000Z	2019-10-15T08:32:52.0000000Z		
17	admin@m365x172465.onmicrosoft.com	https://m365x172465.sharepoint.com/sites/pwa/Nor	Business Plan Design	docx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T17:39:54.0000000Z	2019-10-15T08:32:51.0000000Z		
18	admin@m365x172465.onmicrosoft.com	https://m365x172465-my.sharepoint.com/personal/a	Finance.pbix	pbix	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T17:50:01.0000000Z	2019-10-15T08:32:50.0000000Z		
19	admin@m365x172465.onmicrosoft.com	https://m365x172465-my.sharepoint.com/personal/a	Employee Engagement Plan.docx	docx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T17:49:44.0000000Z	2019-10-15T08:32:50.0000000Z		
20	admin@m365x172465.onmicrosoft.com	https://m365x172465-my.sharepoint.com/personal/a	Proposed_agenda_topics.docx	docx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T17:50:09.0000000Z	2019-10-15T08:32:50.0000000Z		
21	admin@m365x172465.onmicrosoft.com	https://m365x172465-my.sharepoint.com/personal/a	Contoso Q2 Division Sales.pbix	pbix	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T17:49:54.0000000Z	2019-10-15T08:32:49.0000000Z		
22	admin@m365x172465.onmicrosoft.com	https://m365x172465-my.sharepoint.com/personal/a	NC460 Sales Team.pbix	pbix	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T17:50:14.0000000Z	2019-10-15T08:32:49.0000000Z		
23	meganb@m365x172465.onmicrosoft.com	https://m365x172465.sharepoint.com/Shared%20Doc	Blog Post preview.docx	docx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T19:19:28.0000000Z	2019-10-15T08:32:48.0000000Z		
24	meganb@m365x172465.onmicrosoft.com	https://m365x172465.sharepoint.com/Shared%20Doc	Pre-release Memo.docx	docx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T19:19:28.0000000Z	2019-10-15T08:32:47.0000000Z		
25	meganb@m365x172465.onmicrosoft.com	https://m365x172465.sharepoint.com/Shared%20Doc	Northwind Customer Data	xlsx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T19:19:28.0000000Z	2019-10-15T08:32:47.0000000Z		
26	meganb@m365x172465.onmicrosoft.com	https://m365x172465.sharepoint.com/Shared%20Doc	Marketing Strategy Future.docx	docx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T19:19:28.0000000Z	2019-10-15T08:32:47.0000000Z		
27	meganb@m365x172465.onmicrosoft.com	https://m365x172465.sharepoint.com/Shared%20Doc	Contoso Marketing Principals	pptx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T19:19:28.0000000Z	2019-10-15T08:32:46.0000000Z		
28	meganb@m365x172465.onmicrosoft.com	https://m365x172465.sharepoint.com/Shared%20Doc	Contoso Purchasing Permissions.docx	docx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T19:19:28.0000000Z	2019-10-15T08:32:46.0000000Z		
29	meganb@m365x172465.onmicrosoft.com	https://m365x172465.sharepoint.com/Shared%20Doc	International Marketing	docx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T19:19:28.0000000Z	2019-10-15T08:32:45.0000000Z		
30	SHAREPOINT\system	https://m365x172465.sharepoint.com/sites/ContosoF	__sitecon__.png	png	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T19:26:10.0000000Z	2019-10-15T08:32:45.0000000Z		
31	pradeepg@m365x172465.onmicrosoft.com	https://m365x172465.sharepoint.com/sites/ContosoF	Romania 2017.xlsx	xlsx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T19:21:08.0000000Z	2019-10-15T08:32:44.0000000Z		
32	pradeepg@m365x172465.onmicrosoft.com	https://m365x172465.sharepoint.com/sites/ContosoF	Switzerland 2017.xlsx	xlsx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T19:21:08.0000000Z	2019-10-15T08:32:44.0000000Z		
33	pradeepg@m365x172465.onmicrosoft.com	https://m365x172465.sharepoint.com/sites/ContosoF	2017 Revenue Analysis.xlsx	xlsx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T19:21:08.0000000Z	2019-10-15T08:32:43.0000000Z		
34	pradeepg@m365x172465.onmicrosoft.com	https://m365x172465.sharepoint.com/sites/ContosoF	Expense Report Form.xlsx	xlsx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T19:21:15.0000000Z	2019-10-15T08:32:43.0000000Z		
35	pradeepg@m365x172465.onmicrosoft.com	https://m365x172465.sharepoint.com/sites/ContosoF	Norway 2017.xlsx	xlsx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T19:21:08.0000000Z	2019-10-15T08:32:43.0000000Z		
36	pradeepg@m365x172465.onmicrosoft.com	https://m365x172465.sharepoint.com/sites/ContosoF	Expense Report Form.xlsx	xlsx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T19:18:41.0000000Z	2019-10-15T08:32:42.0000000Z		
37	pradeepg@m365x172465.onmicrosoft.com	https://m365x172465.sharepoint.com/sites/ContosoF	Netherlands 2017.xlsx	xlsx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T19:21:08.0000000Z	2019-10-15T08:32:42.0000000Z		
38	pradeepg@m365x172465.onmicrosoft.com	https://m365x172465.sharepoint.com/sites/ContosoF	Slovakia 2017.xlsx	xlsx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T19:21:08.0000000Z	2019-10-15T08:32:42.0000000Z		
39	pradeepg@m365x172465.onmicrosoft.com	https://m365x172465.sharepoint.com/sites/ContosoF	PowerPoint Presentation	pptx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T19:18:41.0000000Z	2019-10-15T08:32:41.0000000Z		
40	pradeepg@m365x172465.onmicrosoft.com	https://m365x172465.sharepoint.com/sites/ContosoF	Contract Process	pptx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T19:21:15.0000000Z	2019-10-15T08:32:41.0000000Z		
41	pradeepg@m365x172465.onmicrosoft.com	https://m365x172465.sharepoint.com/sites/ContosoF	Belgium 2017.xlsx	xlsx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T19:21:08.0000000Z	2019-10-15T08:32:41.0000000Z		
42	meganb@m365x172465.onmicrosoft.com	https://m365x172465.sharepoint.com/sites/ContosoF	Financial Regulations.docx	docx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T19:21:37.0000000Z	2019-10-15T08:32:40.0000000Z		
43	pradeepg@m365x172465.onmicrosoft.com	https://m365x172465.sharepoint.com/sites/ContosoF	Denmark 2017.xlsx	xlsx	One Day Retention	admin@m365x172465.onmicrosoft.com	2019-10-11T19:21:08.0000000Z	2019-10-15T08:32:40.0000000Z		



VIEW DISPOSED ITEMS

- History is kept for the length of the audit log (90 or 365 days)
- Once disposed it will take documents 93 days to appear here
- It will take emails 14-30 days to appear here

The screenshot shows the Microsoft 365 compliance center interface for 'Contoso Electronics'. The 'One Day Retention' section is active, with the 'Disposed items' tab selected. A table lists three disposed items: 'Loan Schedule.xlsx', 'PowerPoint Presentation', and 'Annual Financial Report.docx'. The table includes columns for Title, Location, Comment, Deletion authorized by, and Deletion date. A filters sidebar on the left allows filtering by Type (Documents), Start date (Thu Aug 01 2019), and End date (Tue Apr 14 2020). A 'Clear filters' button is at the bottom of the filters. The status bar at the bottom of the table indicates '0 items selected. 3 items loaded.'

Title	Location	Comment	Deletion authorized by	Deletion date
Loan Schedule.xlsx	https://m365x172465.sharepoint.com/sites/Co...	Dispose approved	admin@M365x172465.on...	10/31
PowerPoint Presentation	https://m365x172465.sharepoint.com/sites/Co...	Dispose approved	admin@M365x172465.on...	10/31
Annual Financial Report.docx	https://m365x172465.sharepoint.com/sites/Co...	Dispose approved	admin@M365x172465.on...	10/31

DISPOSAL IN SHAREPOINT – RETENTION LABEL

Contoso Electronics

SharePoint

Search this library

Mark 8 Project Team

Public group

Home

Conversations

Documents

Shared with us

Notebook

Pages

Site contents

Recycle bin

Edit

Open

Share

Copy link

Download

Delete

Pin to top

Rename

1 selected

Documents

Name	Modified	Modified By	Retention label	Label
Design	September 1	Megan Bowen	One Day Retention	67
Digital Assets Web	September 1	Megan Bowen	One Day Retention	67
General	September 1	Megan Bowen	One Day Retention	67
Go to Market Plan	September 1	Megan Bowen	One Day Retention	67
Marketing	September 2	Allan Deyoung	One Day Retention	67
Research and Development	August 21	Megan Bowen	One Day Retention	67
Campaign Sales Data.xlsx	August 21	Megan Bowen	One Day Retention	11

Progress

1 item wasn't deleted from Do...

Campaign Sales Data.xlsx

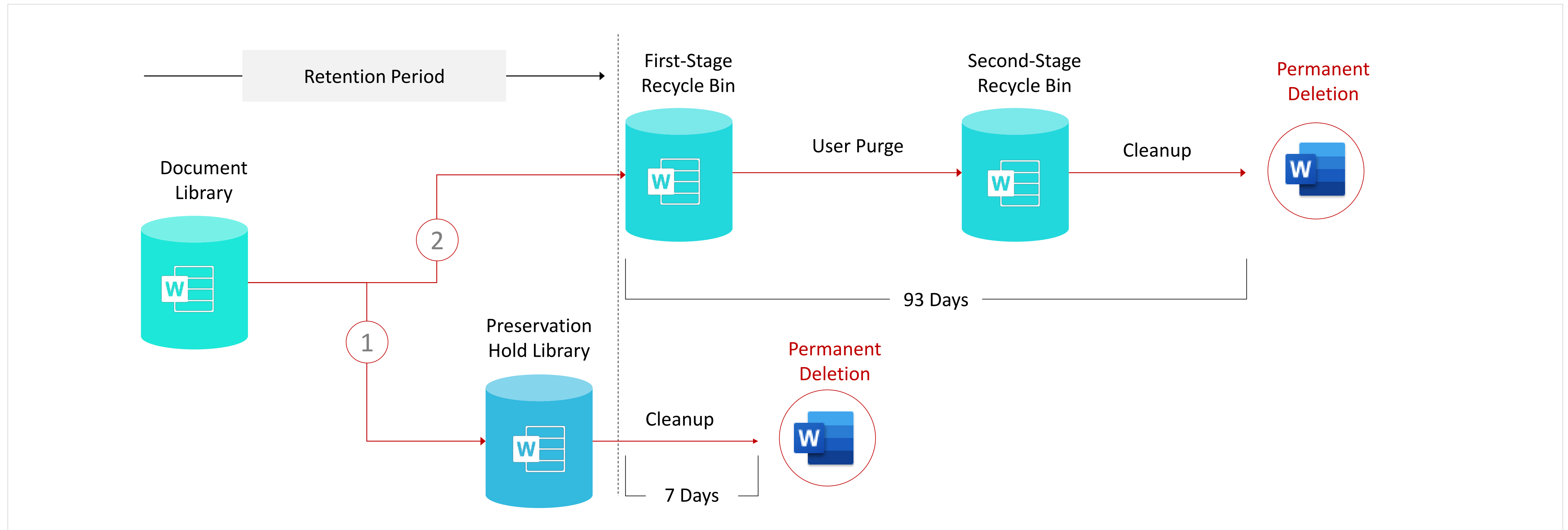
The label that's applied to this item prevents it from being edited or deleted. Check the item's label for more details.

to classic SharePoint



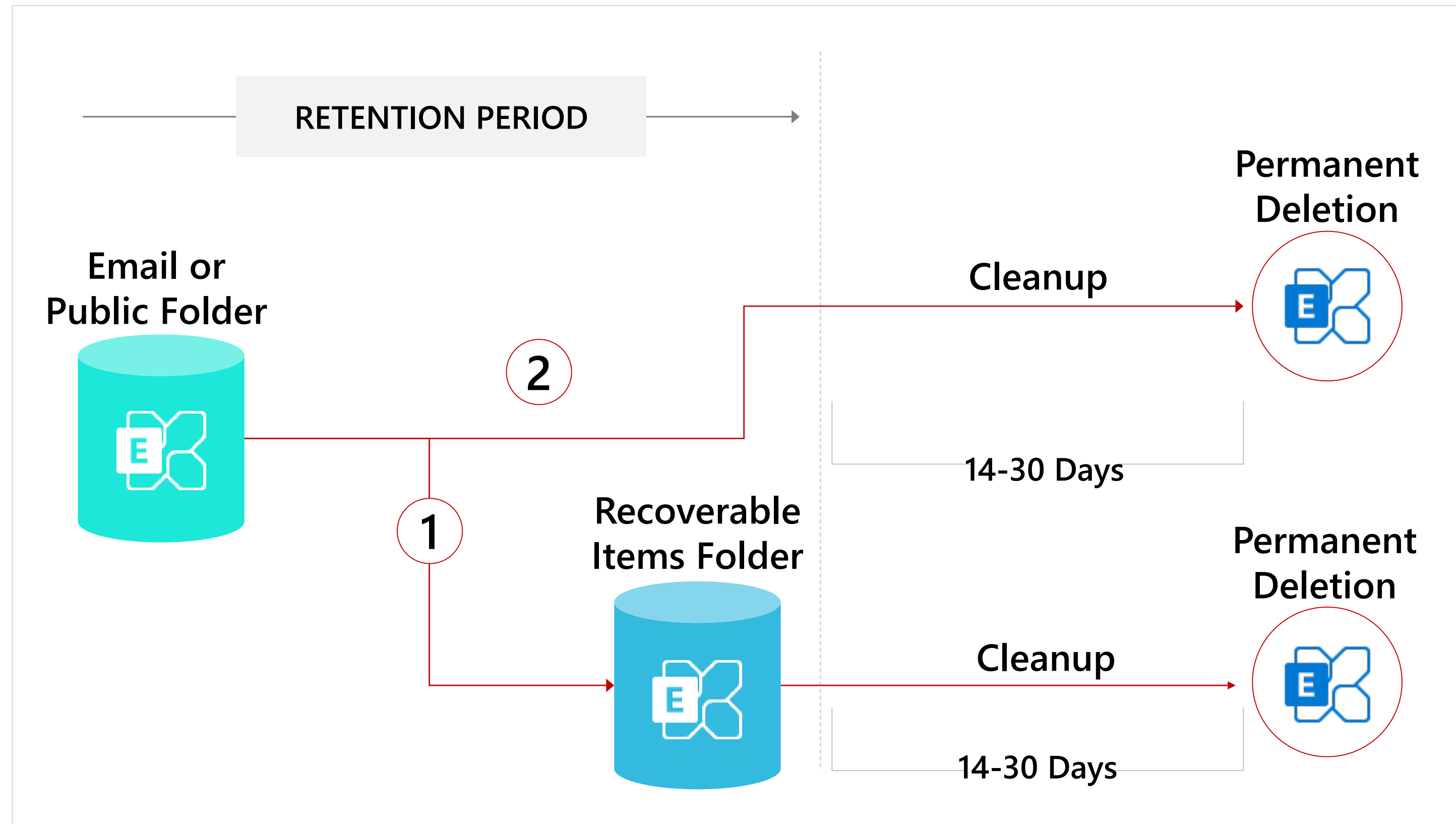
HOW RETENTION POLICY DELETION WORKS IN SHAREPOINT AND ONEDRIVE

CORE



1. If the content is modified or deleted during the retention period
2. If the content is not modified or deleted during the retention period

HOW OFFICE 365 DELETION WORKS IN EXCHANGE MAILBOXES AND PUBLIC FOLDERS



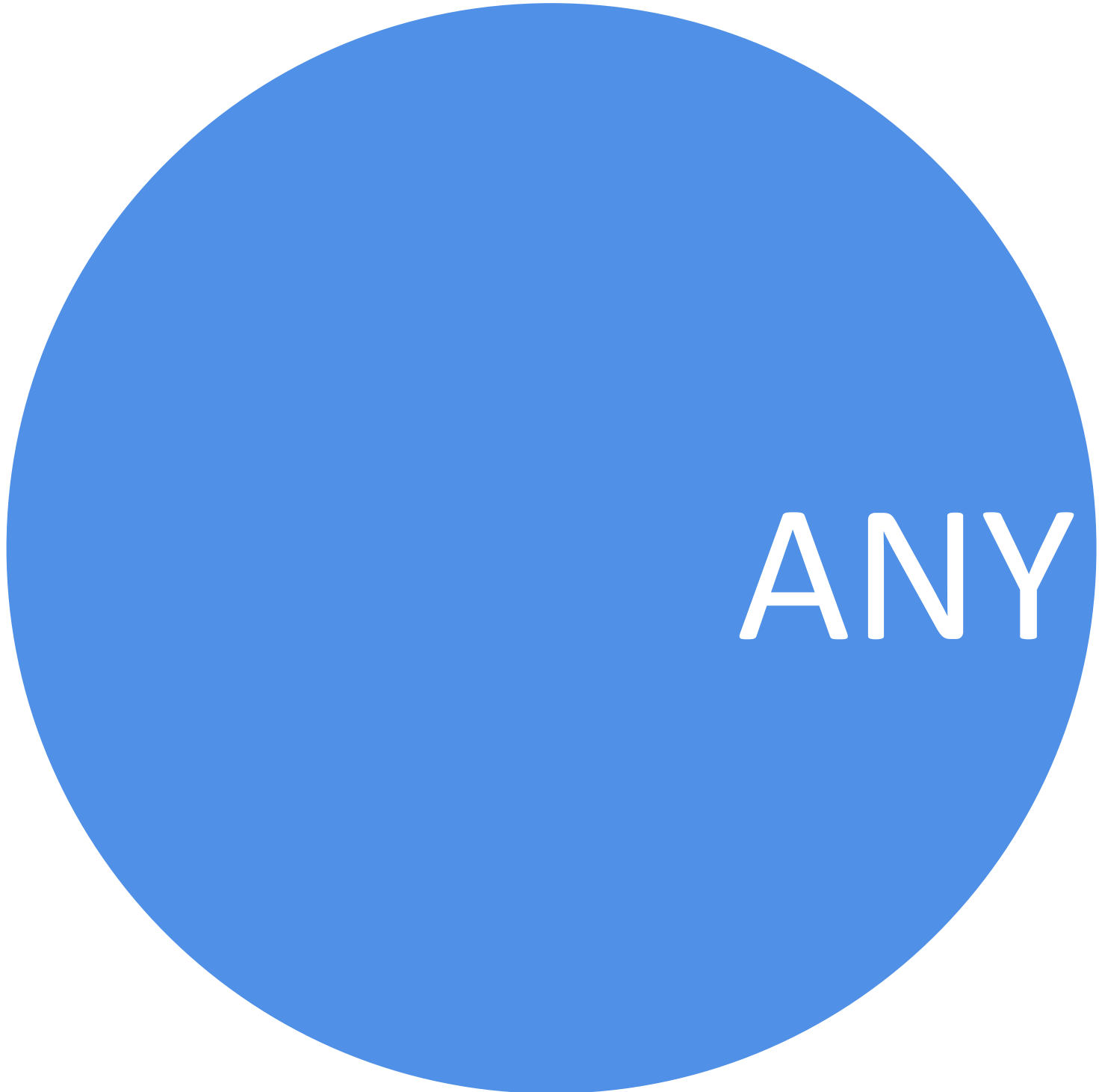
1. If the content is modified or permanently deleted by the user during the retention period
2. If the content is not modified or deleted during the retention period



OFFICE 365 RECORDS MANAGEMENT RESOURCES

- [Microsoft documentation on records management](#)
- [Compliance licensing information](#)
- [\[Video\] Learn more about intelligent information governance across all your data](#)
- [\[Video\] Data is exploding: Intelligently manage your data lifecycle with information governance](#)
- [\[Video\] Trigger retention policies with Events in Advanced Data Governance](#)
- [\[Video\] Information Governance and Mitigation of Compliance Risks in Microsoft 365](#)
- [How To Use Office 365 \(my blog\)](#)
- [Joanne C Klein's Blog](#)





ANY QUESTIONS?



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HOW TO USE
OFFICE 365



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erica.news/linkedin



HowToUseOffice365.com



erica.news/youtube

