Filename: microsoft-ms101-9-3-1-design-data-retention-policies-in-microsoft-365
ShowName: Microsoft 365 Mobility and Security
SubTitle: Exam MS-101
Topic: Configure Data Loss Prevention (DLP)
EpisodeName: Design Data Retention Policies in Microsoft 365
Description: Adam and Wes discuss the steps necessary to help you successfully design data retention policies in Microsoft 365.

Design Data Retention Policies in Microsoft 365

Manage Microsoft 365 Governance and Compliance (35-40%)

Configure Data Loss Prevention (DLP)
• Configure DLP Policies
• Design Data Retention Policies in Microsoft 365
• Manage DLP Exceptions
• Monitor DLP Policy Matches
• Manage DLP Policy Matches

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Design Data Retention Policies in Microsoft 365

With a retention policy, you can:

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• Decide proactively whether to retain content, delete content, or both - retain
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and then delete the content.

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• Apply a single policy to the entire organization or just specific locations
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or users.

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• Apply a policy to all content or just content meeting certain conditions,
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such as content containing specific keywords or specific types of sensitive information.

To understand how different retention policies are applied to content, keep these principles of retention in mind:

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1. Retention wins over deletion.
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Suppose that one retention policy says to delete Exchange email after three years, but another retention policy says to retain Exchange email for five years and then delete it. Any content that reaches three years old will be deleted and hidden from the users' view, but still retained in the Recoverable Items folder until the content reaches five years old, when it will be permanently deleted.

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2. The longest retention period wins.
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If content's subject to multiple policies that retain content, it will be retained until the end of the longest retention period.

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3. Explicit inclusion wins over implicit inclusion. This means:

    a. If a label with retention settings is manually assigned by a user to an
item, that label takes precedence over both a policy assigned at the site or
mailbox level and a default label assigned by the document library.
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For example, if the explicit label says to retain for ten years, but the policy assigned to the site says to retain for only five years, the label takes precedence. Note that auto-apply labels are considered implicit, not explicit, because they are applied automatically by Office 365.

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    b. If a retention policy includes a specific location, such as a specific
user's mailbox or OneDrive for Business account, that policy takes
precedence over another retention policy that applies to all users' mailboxes
or OneDrive for Business accounts but does not specifically include that
user's mailbox.


4. The shortest deletion period wins. Similarly, if content's subject to
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multiple policies that delete content (with no retention), it will be deleted at the end of the shortest retention period.

Understand that the principles of retention work as a tie-breaking flow from top to bottom: If the rules applied by all policies or labels are the same at one level, the flow moves down to the next level to determine precedence for which rule is applied.

Finally, a retention policy or label cannot permanently delete any content that is on hold for eDiscovery. When the hold is released, the content again becomes eligible for the cleanup process described above.