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ShowName: Microsoft 365 Mobility and Security
SubTitle: Exam MS-101
Topic: Manage Data Governance
EpisodeName: Plan Information Retention Policies
Description: Adam and Wes discuss the steps necessary to help you successfully plan information retention policies.

Plan Information Retention Policies

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

Manage Data Governance
• Configure Information Retention
• Plan for Microsoft 365 Backup
• Plan for Restoring Deleted Content
• Plan Information Retention Policies

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Plan Information Retention Policies

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.

How does a retention policy works with content in place?

When you include a location such as a site or mailbox in a retention policy, the content remains in its original location. People can continue to work with their documents or mail as if nothing's changed. But if they edit or delete content that's included in the policy, a copy of the content as it existed when you applied the policy is retained.

For SharePoint site collections, a copy of the original content is retained in the Preservation Hold library when users edit or delete it; for email and public folders, the copy is retained in the Recoverable Items folder.

You can view this library on the Site contents page in the top-level site of the site collection. Most users cannot view the Preservation Hold library because it's visible only to site collection administrators.

Periodically a timer job cleans up the Preservation Hold library. The timer job runs and compares all content in the Preservation Hold library to all of the queries used by the retention policies on the site. Unless content matches at least one of the queries, the timer job permanently deletes the content from the Preservation Hold library.

The previous applies to content that exists when the retention policy is applied. In addition, any new content that's created or added to the site collection after it was included in the policy will be retained after deletion. However, new content is not copied to the Preservation Hold library the first time it's edited, only when it's deleted.

To retain all versions of a file, you need to turn on versioning.

A user will receive an error if they try to delete a library, list, folder, or site that's subject to a retention policy.

A user can delete a folder if they first move or delete any files in the folder that are subject to the policy.

The Preservation Hold library is created only when the first item needs to be copied to the library - not when you create the retention policy.

Therefore, to test your policy, you first need to edit or delete a document in a site subject to the policy, and then browse to the Preservation Hold library to view the retained copy.

NOTE:

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• Teams (chat) content is stored in Exchange, where the policy is applied
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based on message type (email or conversation).

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• A retention policy applied to an Office 365 group includes both the group
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mailbox and site.

How does a retention policy works with document versions in a site collection?

By default, versioning retains a minimum of five hundred major versions, though you can increase this limit.

A retention policy retains all versions of a document in a SharePoint site collection or OneDrive account. Each time a document subject to a retention policy is edited or deleted, a version is copied to the Preservation Hold library.

Each version of a document in the Preservation Hold library exists as a separate item with its own retention period:

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• If the retention policy is based on when the content was created, each
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version has the same expiration date as the original document. The original document and its versions all expire at the same time.

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• If the retention policy is based on when the content was last modified, each
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version has its own expiration date based on when the original document was modified to create that version. The original documents and its versions expire independently of each other.

Teams locations -

You can use a retention policy to retain chats and channel messages in Teams. Teams chats are stored in a hidden folder in the mailbox of each user included in the chat, and Teams channel messages are stored in a similar hidden folder in the group mailbox for the team.

However, it's important to understand that Teams uses an Azure-powered chat service that also stores this data, and by default this service stores the data forever. For this reason, Microsoft recommends that you use the Teams location to retain and delete Teams data. Using the Teams location will permanently delete data from both the Exchange mailboxes and the underlying Azure-powered chat service.

NOTE: Teams chats and channel messages are not affected by retention policies applied to user or group mailboxes in the Exchange or Office 365 groups locations. Even though Teams chats and channel messages are stored in Exchange, they are affected only by a retention policy that's applied to the Teams location.