

Lab Instructions: Document retention via retention labels

1. From Microsoft 365 Admin Center select **Security**
2. On the Office 365 Security and Compliance men bar select **Information Governance**
3. Select **Retention**
4. Click in the **Labels** section
5. Select 
6. **Name: Finance Record**
7. **Description for Admins: Items tagged with this label will be kept for 3 years then deleted**
8. **Descriptions for users: Items tagged with this label will be kept for 3 years then deleted**
9. Click on Next to continue
10. Click in the Ref ID box and select 
11. Type **Finance 232**
12. Select **Add**
13. For **Business** Function scroll down to select **Procurement**
14. For **category** select **Financial Statements**
15. For **Authority type** select **Business**
16. For **Provision Citation** select 
17. Click on Next then turn on the Retention Policy
18. Type 3 for the Retention years
19. Select **Delete the content automatically**
20. Retain on delete the content based on **when I was last modified**
21. Select **Next**
22. Select 
23. Scroll down and select **Publish this Label**
24. Select **Choose Labels to Publish**

25. Select +Add

26. Select Finance Record

27. Click on Add

28. Select Done

29. Click on Next

30. Click on Let me choose specific Locations

**31. Scroll down the list of locations and deselect Sharepoint, Onedrive, Office
365 groups**

32. Select Next

33. Policy Name: Retention of Finance documents

34. Policy Description: Retention of Finance documents

35. Select Next to continue

36. Select Publish Labels

37. Close Retention Labels in the Address bar