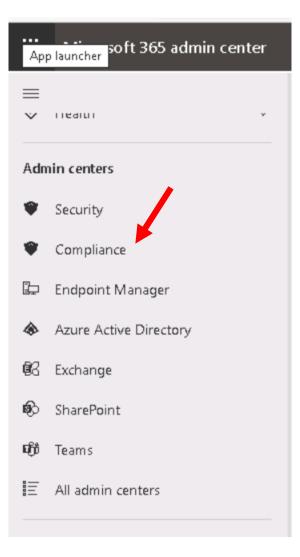
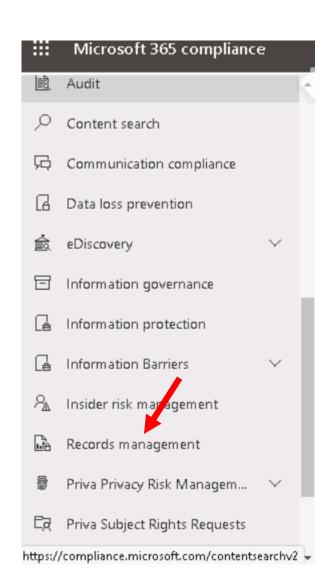
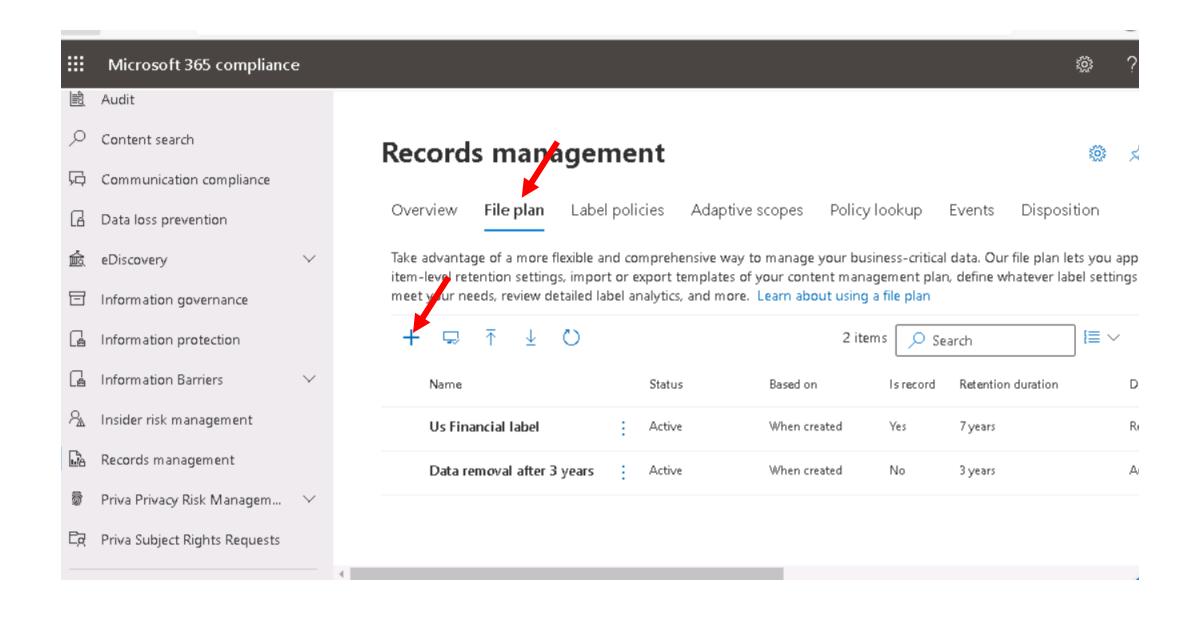
Records Management

What is Microsoft record management?

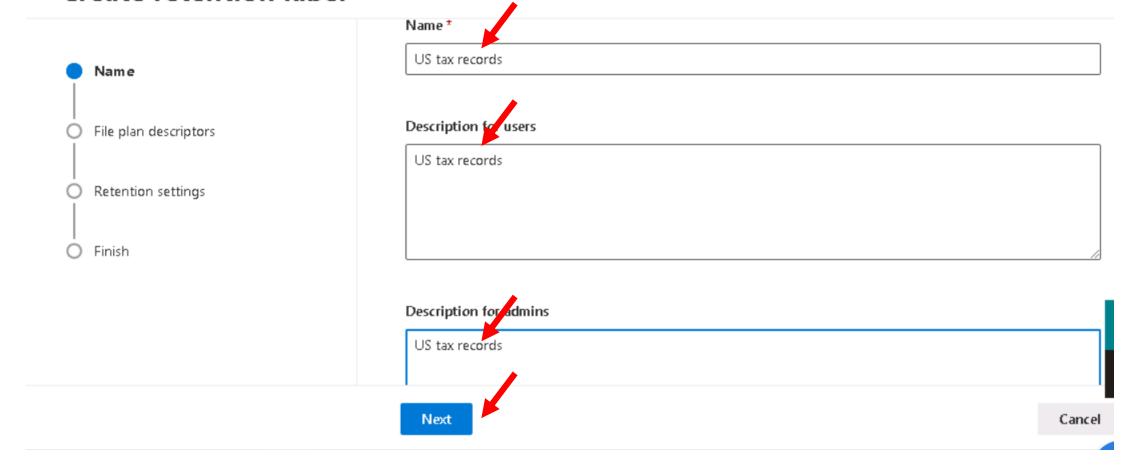
Records management in Microsoft 365 helps an organization manage their legal obligations, provides the ability to demonstrate compliance with regulations, and increases efficiency with regular disposition of items that are no longer required to be retained, no longer of value, or no longer required for business.

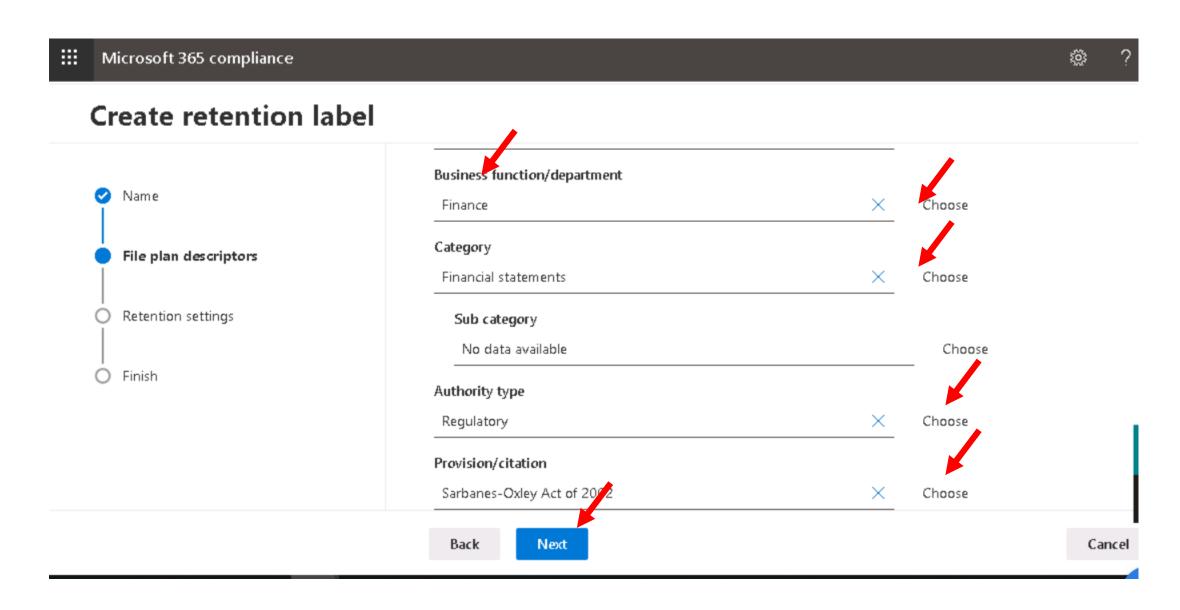




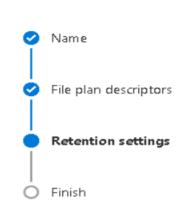








Creating a file plan that contains a retention label that conforms with the Sarbanes-oxley Act



Define retention settings

When this label is applied to items, the content is retained and/or deleted based on the settings you choose here.

Retain items for a specific period

Labeled items will be retained for the period you choose.

Retention period

7 years

Start the retention period based on

When items were created

+ Create new event type

During the retention period

Retain items even if users delete

Users will be able to edit items and change or remove the label. If they delete items, we'll keep copies in a secure location. Learn more

Mark items as a record

At the end of the retention period

Delete items automatically

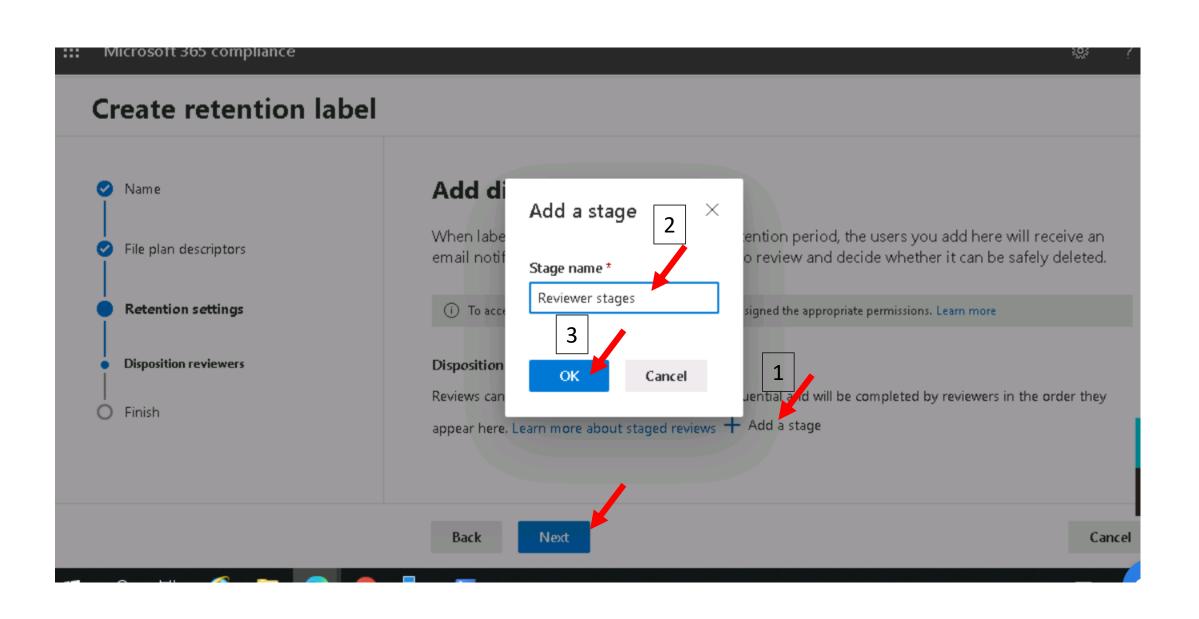
Trigger a disposition review

Reviewers you choose in the next step will receive an email notifying them that it's time to review items to decide if they can be safely deleted. Learn more

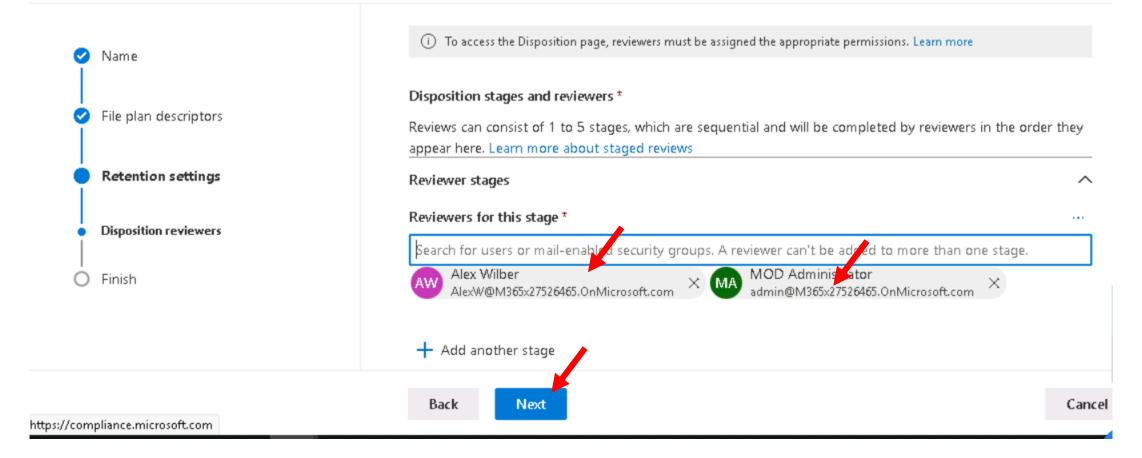
Do nothing

Items will be left in place. You'll have to manually delete them if you want them gone.

receive man we receive process four more to more again, deserte areas a your more areas govern	
Retain items forever Labeled items will be retained forever, even if users delete them.	
Only delete items when they reach a certain age Labeled items won't be retained, but when they reach the age you choose, we'll delete them from where they're stored.	1
Don't retain or delete items Labeled items won't be retained or deleted. Choose this setting if you only want to use this label to class items.	ify
Back Next C	ancel

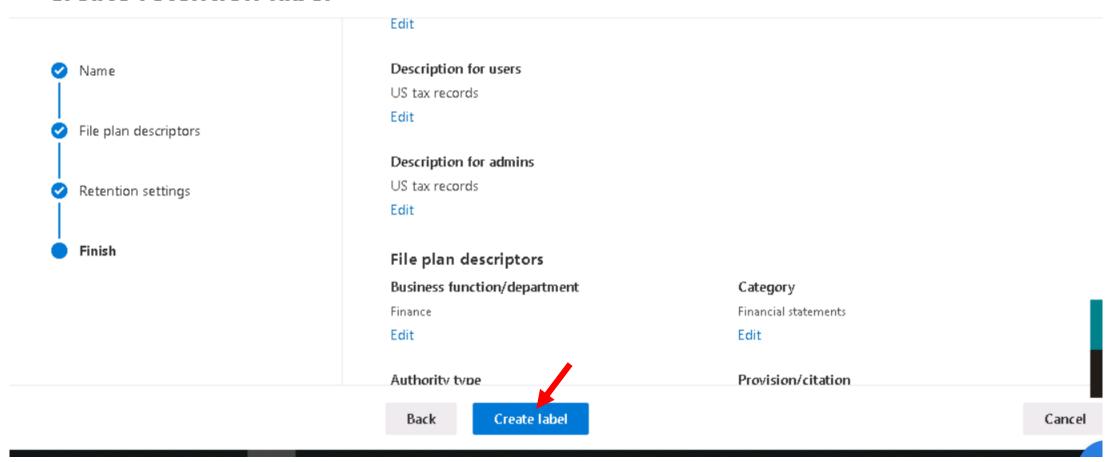






303

Create retention label





✓ Name✓ File plan descriptors✓ Retention settings

Your retention label is created

Creating the label is just the first step in classifying and governing content. To make this label available to users in your organization, publish it in select locations or auto-apply it to specific content.

Next steps

Publish this label to Microsoft 365 locations

You'll create a label policy to make this label available in locations like Exchange and OneDrive. When published, users can manually apply it to their content or set it as the default label for content containers (such as SharePoint document libraries or email folders).

Auto-apply this label to a specific type of content

You'll create an auto-labeling policy to apply the label to content matching certain conditions, such as content containing specific sensitive info.

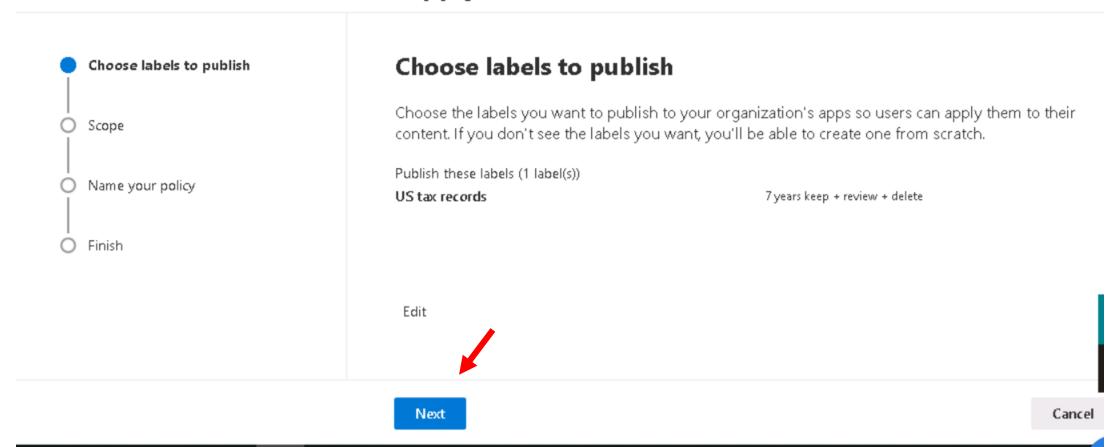
Do Nothing

You cap publish or auto-apply it to content later.



Finish









Choose the type of retention policy to create

A policy can be adaptive or static. Advantage of an adaptive policy will automatically update where it's applied based on attributes or properties you'll define. A static policy is applied to content in a fixed set of locations and must be manually updated if those locations change.

○ Adaptive

After selecting adaptive policy scopes, which consist of attributes or properties (e.g. 'Department' or 'Site URL' that define the users, groups, or sites in your org, you'll choose supported locations containing the content you want to retain. The policy will automatically update to match the criteria defined in the scopes.

Static

You'll choose locations containing the content you want to retain. If locations change after this policy is created (for example if a SharePoint site is added or removed), you'll need to manually update the policy.

Back

Next

Cance





Choose locations

We'll publish the labels to the locations you choose.

- All locations. Includes content in Exchange email, Office 365 groups, OneDrive and SharePoint documents.
- Let me choose specific locations.

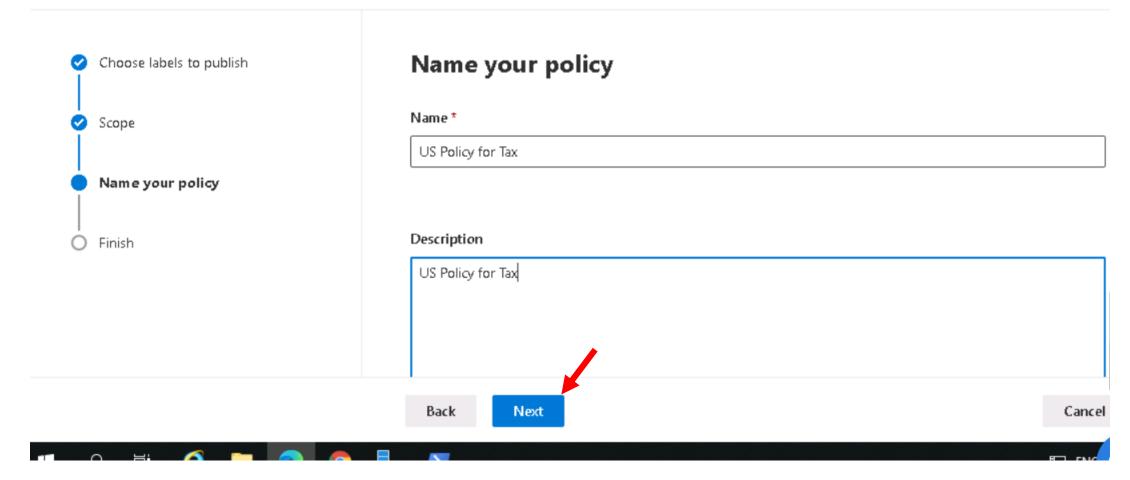


Back

Next

Cancel







Choose labels to publish Scope Name your policy

Finish

 \triangle It will take up to 1 day for labels to appear to your users. Labels will appear in Outlook and Outlook web app only for mailboxes that have at least 10 MB of data.

Choose labels to publish

1 label(s) will be published (made available) so your users can classify their content US tax records 7 years keep + review + delete

Edit

Applies to content in these locations

Exchange email (All Recipients) SharePoint sites (All Sites) OneDrive accounts (All Sites) Microsoft 365 Groups (All Groups)

Edit

Back









Finish























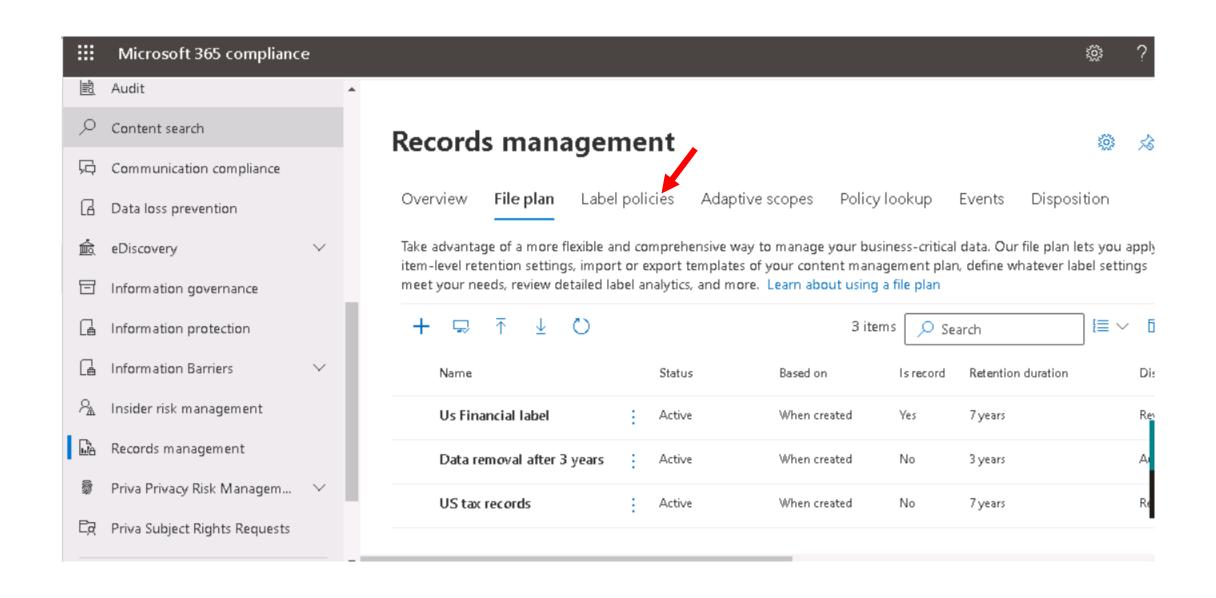
Your retention label was published

Within a week, the retention label will be available to users and admins in the locations you specified. Labels will only appear in Outlook and Outlook on the web for mailboxes with at least 10 MB of data. If the label doesn't appear within seven days of being published, check its status on the Label policies page. Learn more about when retention labels become available

Related tasks

Done

Publish another retention label	Get started		
Auto-apply a retention label	Get started		
Create a retent on label	Cot started		
_			



Records management







Overview File plan Label policies

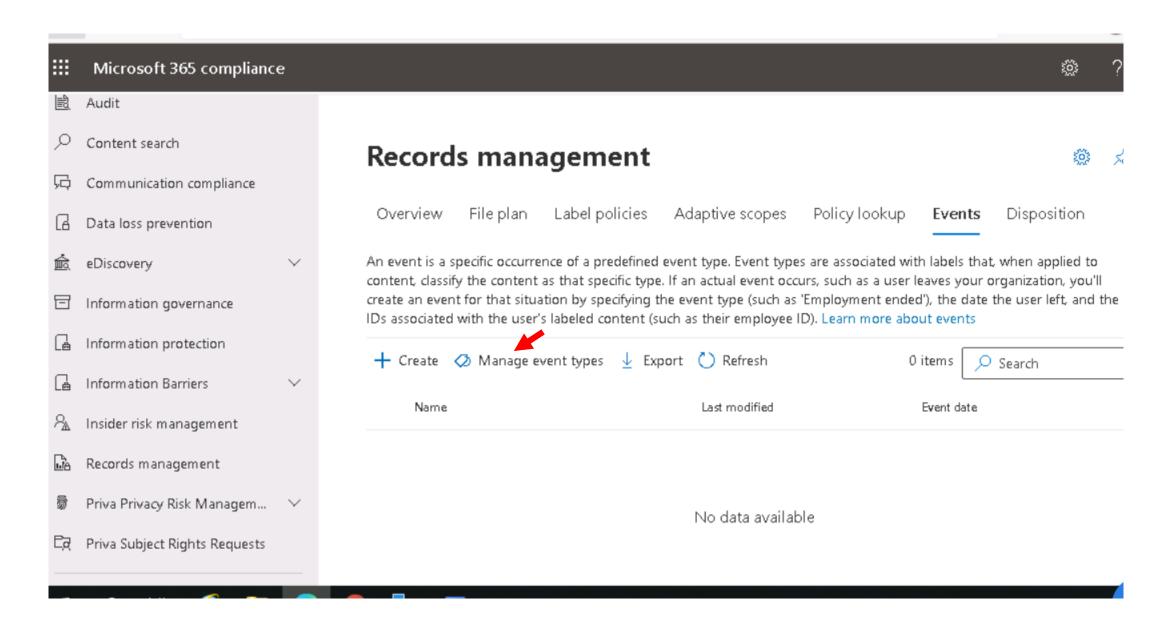
Adaptive scopes Policy lookup

okup Events

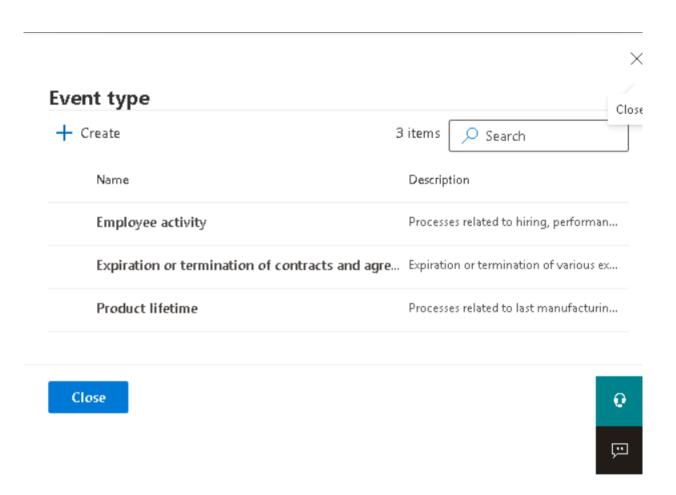
Disposition

Use label policies to publish or auto-apply labels. Auto-labeling policies apply labels to content matching conditions you defit while publishing label policies make labels available for users to manually apply in specific locations.

🖵 Publish labels 🛭 🚜 Auto-apply	a label 💍 Refresh	4 items Search
Name	Туре	Created by Last modi Last modified
Three year retention	Publish	MOD Ad MOD Ad 3/8/2022
Delete data after 3 years	Publish	MOD Ad MOD Ad 3/8/2022
Us Finance TAx policy	Publish	MOD Ad MOD Ad 3/9/2022
US Policy for Tax	Publish	MOD Ad MOD Ad 3/10/2022
4		



You can create a file plan and a policy based on a specific event



By default you get the Default events shown above

Records management

→ Show in naviga

Overview	File plan	Label policies	Events
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Use our records management features to help demonstrate compliance with regulations and corporate policies. Take control of your content lifecycle by classifying and retaining business critical records, and increase efficiency with regular disposition of records that are no longer required to be retained, no longer of value, or no longer required for business purposes. Learn more

Pending dispositions		Label application activity	
Source policy	Item count	Last updated January 26, 2021 3:36 PM	
US tax records	•••		
		Manually applied Automatically applied	
View all pending dispositions		Manage your File Plan	

The overview screen will show the policy and how many people have been impacted by the policy. You can also view All pending dispositions and manage you File plan from this screen.