

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 .

App launcher

Microsoft 365 admin center

Features

Admin centers

Security

Compliance

Endpoint Manager

Azure Active Directory

Exchange

SharePoint

Teams

All admin centers



Microsoft 365 compliance

Audit

Content search

Communication compliance

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Insider risk management

Records management

Privacy Risk Management

Privacy Subject Rights Requests

<https://compliance.microsoft.com/contentsearchv2>



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- Records management
- Privacy Risk Management
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Records management

Overview **File plan** Label policies Adaptive scopes Policy lookup Events Disposition

Take advantage of a more flexible and comprehensive way to manage your business-critical data. Our file plan lets you apply item-level retention settings, import or export templates of your content management plan, define whatever label settings meet your needs, review detailed label analytics, and more. [Learn about using a file plan](#)



2 items



Name	Status	Based on	Is record	Retention duration	Disposition
Us Financial label	Active	When created	Yes	7 years	Retention
Data removal after 3 years	Active	When created	No	3 years	Automatic

Create retention label

- Name**
- File plan descriptors
- Retention settings
- Finish

Name *

US tax records

Description for users

US tax records

Description for admins

US tax records

Next

Cancel

Microsoft 365 compliance

⚙️ ?

Create retention label

✓ Name

● **File plan descriptors**

○ Retention settings

○ Finish

Business function/department

Finance

×

Category

Financial statements

×

Sub category

No data available

Authority type

Regulatory

×

Provision/citation

Sarbanes-Oxley Act of 2002

×

Choose

Choose

Choose

Choose

Choose

Back

Next

Cancel

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

Create retention label

- ✓ Name
- ✓ File plan descriptors
- Retention settings**
- Finish

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.

Some choices here in product design have to manually delete them if you don't want them.

- ☐ **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.
- ☐ **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 classify items.

Back

Next

Cancel

Create retention label

- ✓ Name
- ✓ File plan descriptors
- **Retention settings**
- Disposition reviewers
- Finish

Add a stage

When labels are applied to content, email notifications are sent to the reviewers.

To access the retention period, the users you add here will receive an email notification to review and decide whether it can be safely deleted.

Disposition reviewers

Reviews can be staged. Reviews can be staged and will be completed by reviewers in the order they appear here. [Learn more about staged reviews](#)

Add a stage

2

Stage name *

Reviewer stages

3

OK

Cancel

1

When labels are applied to content, email notifications are sent to the reviewers.

To access the retention period, the users you add here will receive an email notification to review and decide whether it can be safely deleted.

Reviews can be staged. Reviews can be staged and will be completed by reviewers in the order they appear here. [Learn more about staged reviews](#)

[Add a stage](#)

Back

Next

Cancel



Create retention label

- ✓ Name
- ✓ File plan descriptors
- **Retention settings**
- Disposition reviewers
- Finish

ⓘ To access the Disposition page, reviewers must be assigned the appropriate permissions. [Learn more](#)

Disposition stages and reviewers *

Reviews can consist of 1 to 5 stages, which are sequential and will be completed by reviewers in the order they appear here. [Learn more about staged reviews](#)

Reviewer stages

Reviewers for this stage *

Search for users or mail-enabled security groups. A reviewer can't be added to more than one stage.



Alex Wilber
AlexW@M365x27526465.OnMicrosoft.com



MOD Administrator
admin@M365x27526465.OnMicrosoft.com



+ Add another stage

Back

Next

Cancel



Create retention label

- ✓ Name
- ✓ File plan descriptors
- ✓ Retention settings
- Finish

[Edit](#)

Description for users

US tax records

[Edit](#)

Description for admins

US tax records

[Edit](#)

File plan descriptors

Business function/department

Finance

[Edit](#)

Category

Financial statements

[Edit](#)

Authority type

Provision/citation

[Back](#)

[Create label](#)

[Cancel](#)



Create retention label

- ✓ Name
- ✓ File plan descriptors
- ✓ Retention settings
- ✓ Finish

✓ 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 can publish or auto-apply it to content later.


Done



Publish labels so users can apply them to their content.

☒ Choose labels to publish

☐ Scope

☐ Name your policy

☐ Finish

Choose labels to publish

Choose the labels you want to publish to your organization's apps so users can apply them to their content. If you don't see the labels you want, you'll be able to create one from scratch.

Publish these labels (1 label(s))

US tax records

7 years keep + review + delete

Edit



Next

Cancel



Publish labels so users can apply them to their content.

☒ Choose labels to publish

☒ **Scope**

☐ Name your policy

☐ 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.

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Next

Cancel



Publish labels so users can apply them to their content.

☒ Choose labels to publish

☒ **Scope**

☐ Publish to users and groups

☐ Name your policy

☐ Finish

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



Publish labels so users can apply them to their content.

☒ Choose labels to publish

☒ Scope

☒ **Name your policy**

☐ Finish

Name your policy

Name *

US Policy for Tax

Description

US Policy for Tax

Back

Next

Cancel



Publish labels so users can apply them to their content.

✓ Choose labels to publish

✓ Scope

✓ Name your policy

● **Finish**

Finish

⚠ 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](#)

Submit

[Cancel](#)



ENG



Publish labels so users can apply them to their content.

✓ Choose labels to publish

✓ Scope

✓ Name your policy

✓ 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

Publish another retention label

Get started

Auto-apply a retention label

Get started

Create a retention label

Get started

Done

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+

🖨

↑

↓

↺

3 items

🔍 Search

☰

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Data removal after 3 years	⋮ Active	When created	No	3 years	Ar
US tax records	⋮ Active	When created	No	7 years	Re

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

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

4 items



Name		Type	Created by	Last modified by	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

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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](#)

+ CreateManage event typesExportRefresh

0 itemsSearch

NameLast modifiedEvent date

No data available

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

×

Event type

+ Create

3 items

Search

Name	Description
Employee activity	Processes related to hiring, performan...
Expiration or termination of contracts and agre...	Expiration or termination of various ex...
Product lifetime	Processes related to last manufacturin...

Close

Close

By default you get the Default events shown above

Records management

Show in navig.

Overview File plan Label policies Events

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

Source policy

Item count

US tax records

0

Label application activity

Last updated January 26, 2021 3:36 PM



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.