



# Retention and Disposition

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SOURCE: <https://learn.microsoft.com/en-us/purview/retention>  
<https://learn.microsoft.com/en-us/purview/disposition>



<https://t.me/learningnets>



## Purpose of Retention

For many organizations, the amount and complexity of their data—ranging from emails and documents to instant messages—grows each day. Managing or governing this data effectively is crucial for several reasons:

- It enables organizations to proactively adhere to both industry standards and internal guidelines mandating the retention of certain information for set durations. For instance, under regulations like the Sarbanes-Oxley Act, specific content types may need to be preserved for seven years.
- It diminishes the risk associated with legal disputes or security incidents by allowing for the permanent removal of outdated content that's no longer necessary to retain.
- It assists organizations in fostering efficient knowledge sharing and enhancing agility by ensuring that employees have access to only the most current and pertinent information.



## Understanding Retention Actions

With retention actions, you can configure retention settings for the following outcomes:

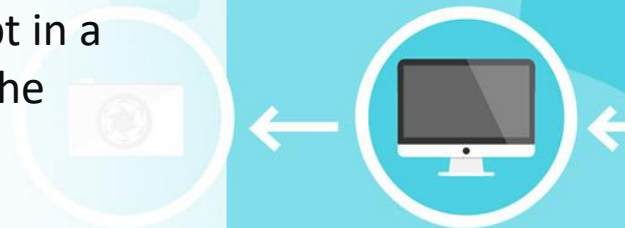
- Retain-only: Retain content forever or for a specified period of time.
- Delete-only: Permanently delete content after a specified period of time.
- Retain and then delete: Retain content for a specified period of time and then permanently delete it.

These retention configurations allow you to manage content on-site, reducing the extra burden of setting up and managing new storage systems for the purpose of compliance retention. Furthermore, there's no requirement for you to deploy specialized methods for duplicating and keeping this data in sync.

# How retention settings work with content in place

Content with assigned retention settings stays in its initial place. Generally, individuals carry on interacting with their documents or emails unchanged. However, should they modify or remove content governed by the retention policy, the system automatically preserves a copy.

- In SharePoint and OneDrive sites, this preserved copy is kept in the Preservation Hold library.
- Within Exchange mailboxes, it's stored in the Recoverable Items folder.
- For content from Teams, Viva Engage messages, and interactions using Microsoft Copilot for Microsoft 365, the copy is kept in a concealed folder named SubstrateHolds, located within the Exchange Recoverable Items folder as a subfolder.

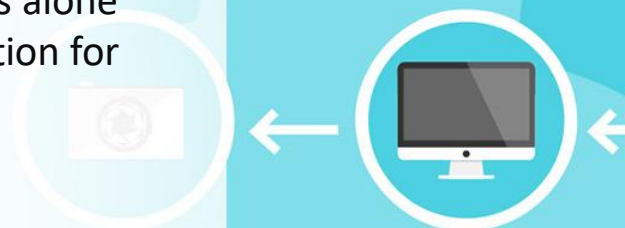


# Retention Policies and Retention Labels

To apply your desired retention settings to content, you have the option to utilize either retention policies or retention labels with corresponding label policies. These methods can be employed individually or in tandem for greater effect.

- Use a **retention policy** when you want to set uniform retention parameters for all content within a specific site or mailbox.
- Use a **retention label** when you need to dictate retention settings for particular items, such as folders, documents, or emails.

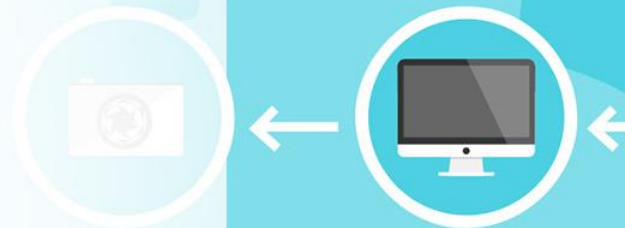
For instance, should you need to maintain all documents on a SharePoint site for five years, implementing a retention policy is a more streamlined approach than attaching the same retention label to each document individually. Conversely, if a site contains documents that require different retention durations—some for five years and others for ten—retention policies alone would not suffice. In such cases, retention labels are your go-to solution for item-specific retention requirements.



# Retention labels and policies that apply them

When you publish retention labels, they're included in a retention label policy that makes them available for admins and users to apply to content. As the following diagram shows:

1. A single retention label can be included in multiple retention label policies.
2. Retention label policies specify the locations to publish the retention labels. The same location can be included in multiple retention label policies.



# Retention Policy Precedence

## The principles of retention

1. Retention wins over deletion

if conflicts remain

2. Longest retention period wins

if conflicts remain

3. Explicit wins over implicit for deletions

if conflicts remain

4. Shortest deletion period wins





## Disposition Reviews

When content reaches the end of its retention period, there are several reasons why you might want to review that content and confirm whether it can be permanently deleted ("disposed"). For example, instead of deleting the content, you might need to:

- Suspend the deletion of relevant content for litigation or an audit.
- Assign a different retention period to the content, perhaps because the original retention settings were a temporary or provisional solution.
- Move the content from its existing location to an archive location, for example, if that content has research or historical value.

When a disposition review is triggered at the end of the retention period, your chosen reviewers receive an email notification that they have content to review. These reviewers can be individual users or members of a mail-enabled security group. When you use a mail-enabled security group, only group members and not the group owner receive the email notifications.