How to Create a Retention Policy in Microsoft Purview

This guide explains how to create a retention policy in Microsoft Purview, using a 7-year retention period as an example. A retention policy helps your organization manage the lifecycle of its data, ensuring critical content is retained for compliance and operational needs. It defines how long data is kept and what happens once the retention period ends, which is essential for meeting regulatory requirements and safeguarding important information.

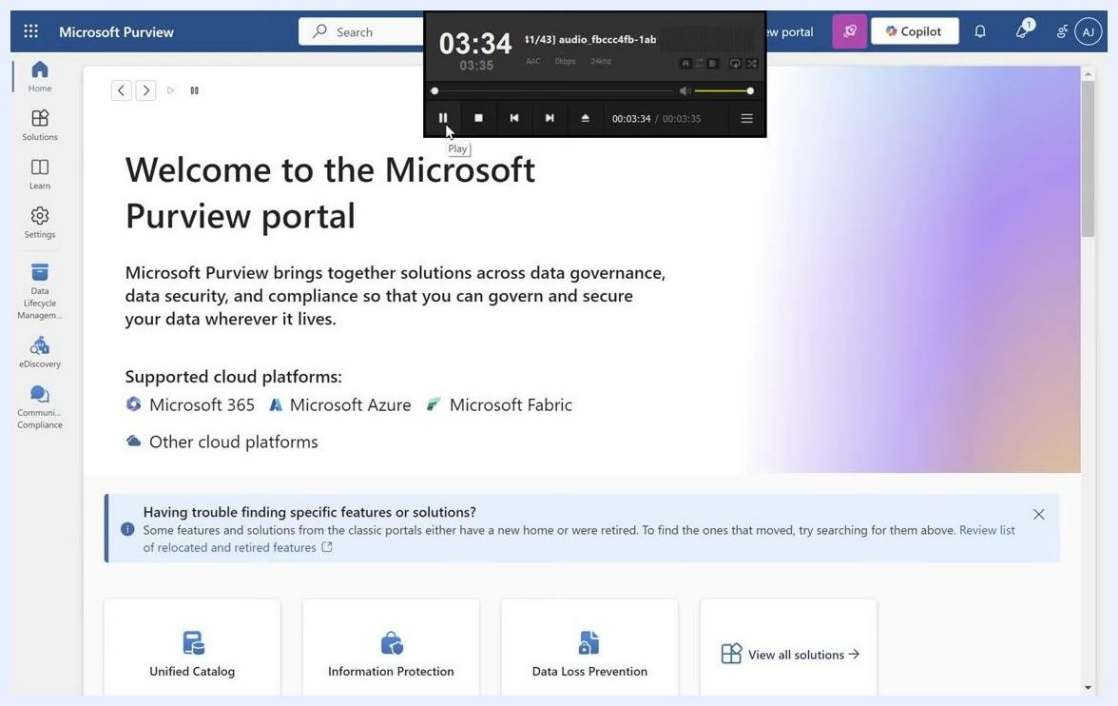
Prerequisites

Before you begin, make sure you have one of the following roles in Microsoft Purview:

- Global Administrator
- Compliance Administrator
- Security Administrator

Step 1: Sign in to Microsoft Purview

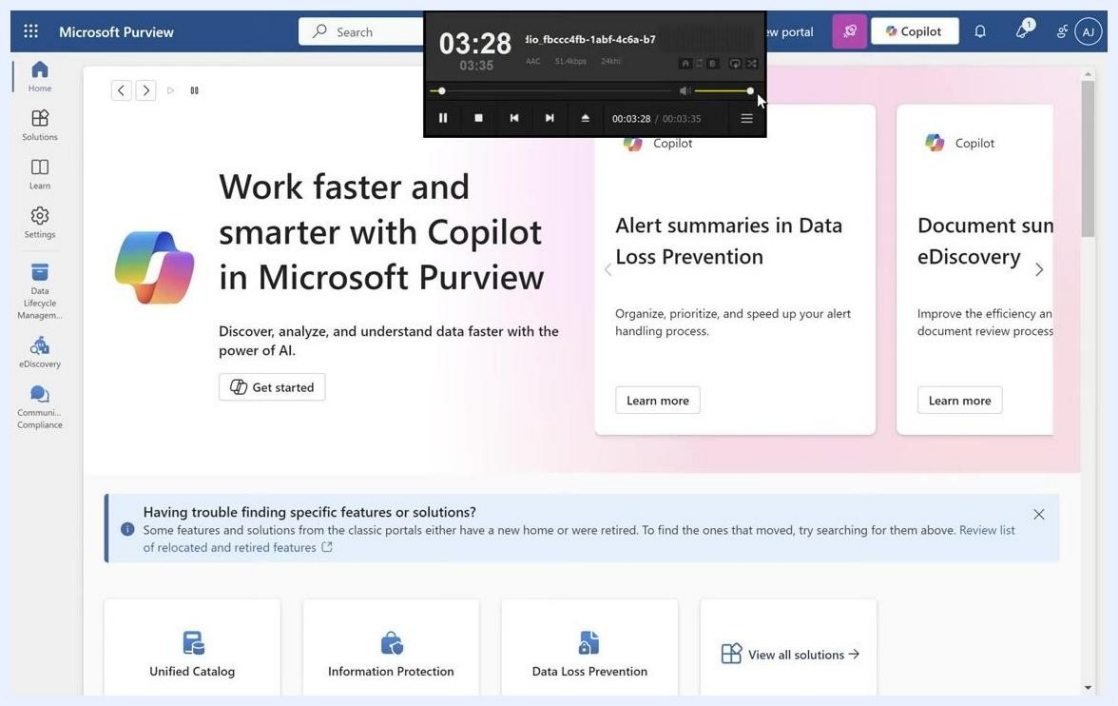
Open your web browser and go to the Microsoft Purview portal at . Sign in using one of the admin credentials listed above. You'll see the portal's welcome screen with the navigation menu on the left.



Microsoft Purview portal welcome screen with a left navigation menu showing Home, Solutions, Learn, Settings, Data Lifecycle Management, eDiscovery, and Communication Compliance. The main area displays "Welcome to the Microsoft Purview portal" along with supported cloud platforms.

Step 2: Access Data Lifecycle Management

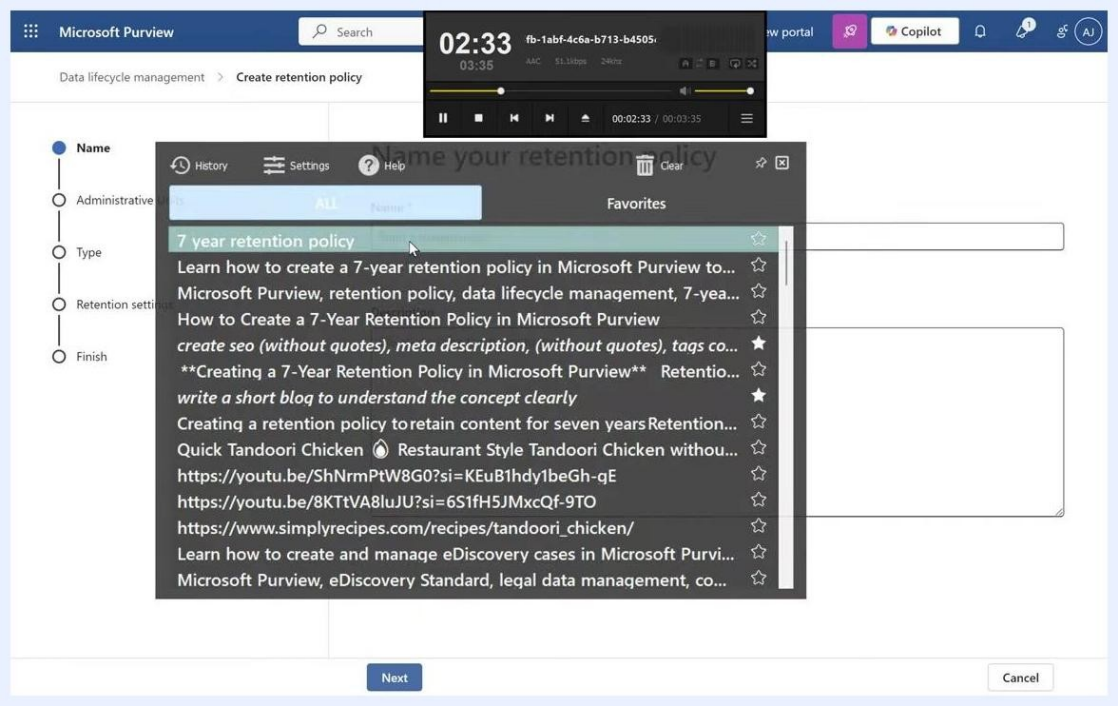
In the left navigation pane, select View all solutions, then click Data Lifecycle Management. Under Data Lifecycle Management, select Policies, and then choose Retention.



Microsoft Purview main dashboard with Data Lifecycle Management highlighted in the left navigation. The main area shows "Work faster and smarter with Copilot in Microsoft Purview" along with solution tiles at the bottom.

Step 3: Create a new retention policy

Click New Retention Policy. In the policy creation form, enter a name such as 7-Year Retention Policy (or "7yr retention policy") and add a clear description, for example "Retain content for 7 years for compliance." Click Next to continue.



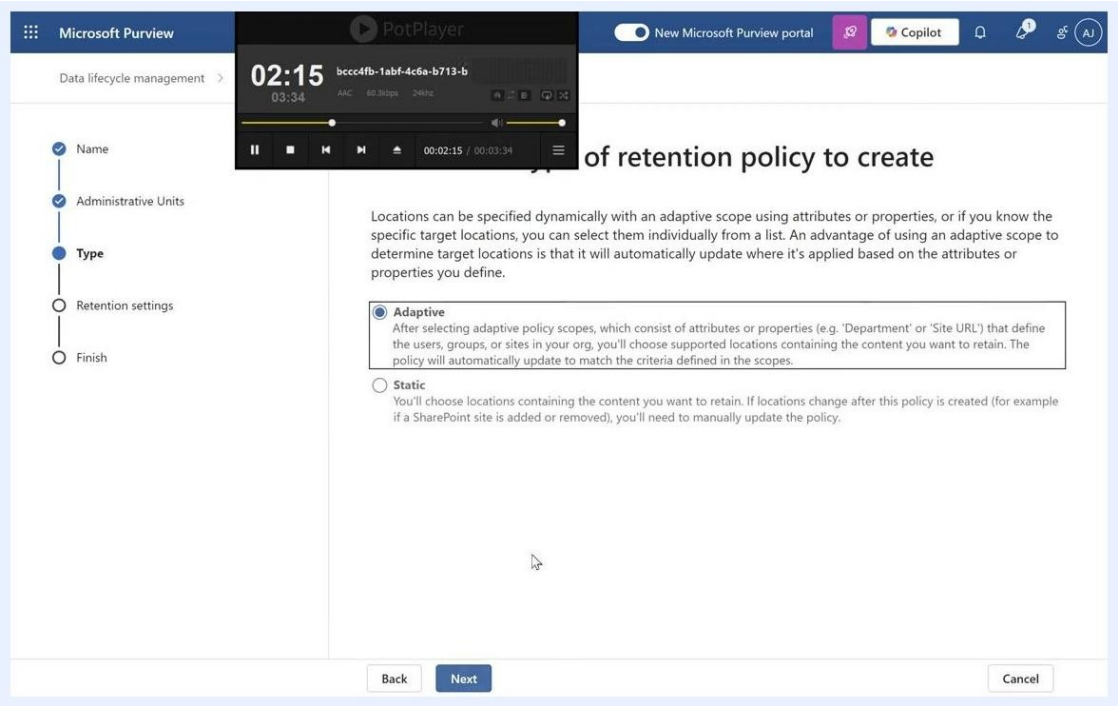
Microsoft Purview retention policy creation form with Name and Description fields, showing "7yr retention policy" being entered. The stepper on the left displays the stages: Name, Administrative Units, Type, Retention settings, Finish.

Step 4: Define the policy scope

In the policy wizard, review the policy scope section. To apply the policy across your entire organization, keep the scope set to All Users and Guests, then continue through the wizard to configure the remaining settings.

Step 5: Configure administrative units (optional)

On the Administrative Units step, choose whether to apply the policy to the entire directory or to specific admin units. To target specific groups, click Add or remove admin units and select the units you want. For organization-wide coverage, leave the setting as Full directory.



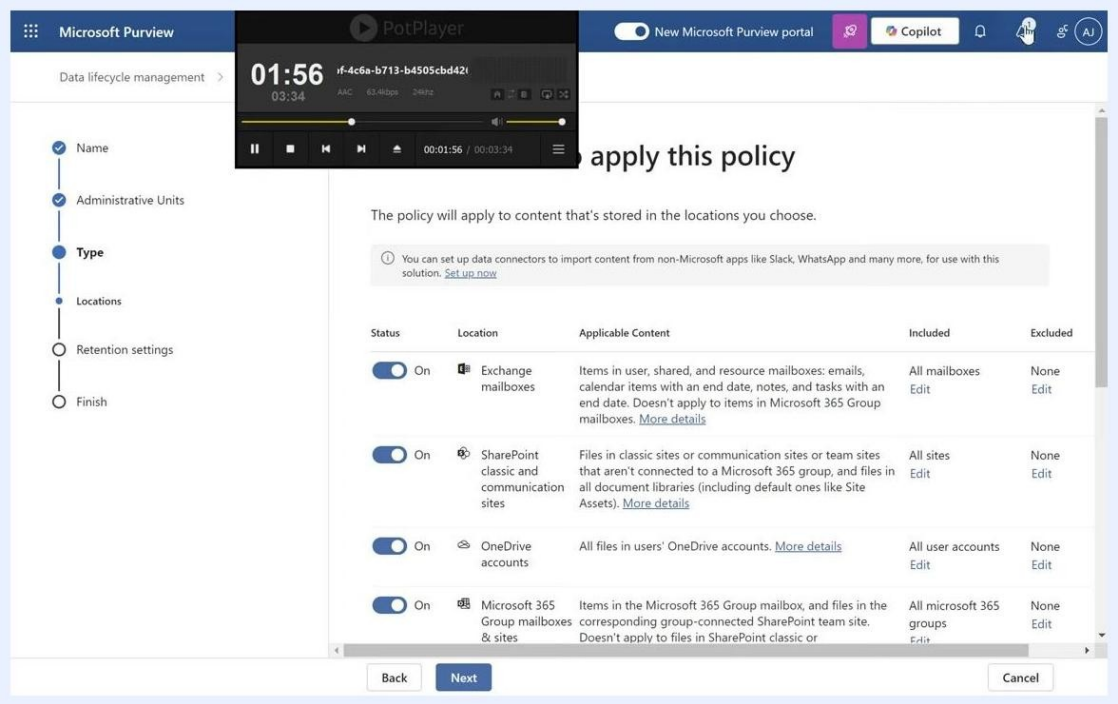
Microsoft Purview Administrative Units step showing the "Add or remove admin units" button with "Full directory" selected. The wizard progress bar highlights the Administrative Units step.

Step 6: Specify how locations are selected

On the Type step, choose how you want to specify locations for the retention policy:

- Adaptive: Uses attributes or properties (such as Department or Site URL) for dynamic targeting. The policy automatically updates as users, groups, or sites matching the criteria change.
- Static: Lets you manually choose specific locations. This is the recommended option for this scenario.

Select Static to identify exact locations for the policy.



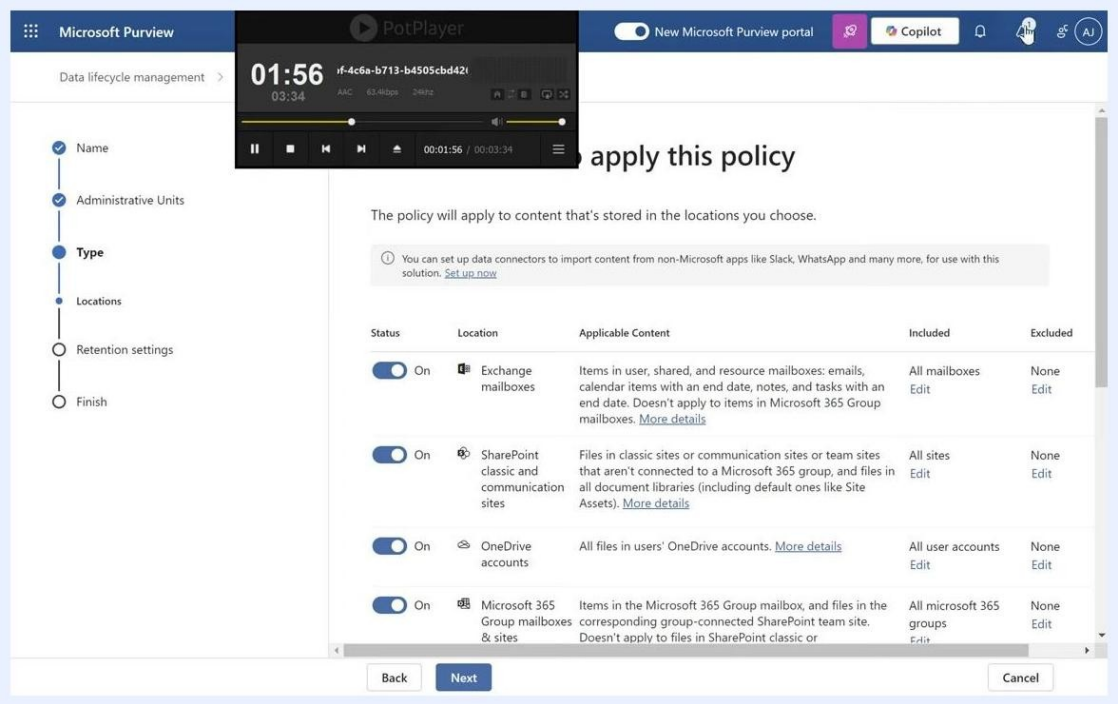
Microsoft Purview Type step showing the Adaptive and Static location options, with a red arrow pointing to Static being selected.

Step 7: Select locations

On the Locations step, toggle on the locations you want the policy to apply to:

- Exchange mailboxes
- SharePoint classic and communication sites
- OneDrive accounts
- Microsoft 365 group mailboxes & sites

Make sure each location's toggle is set to On.



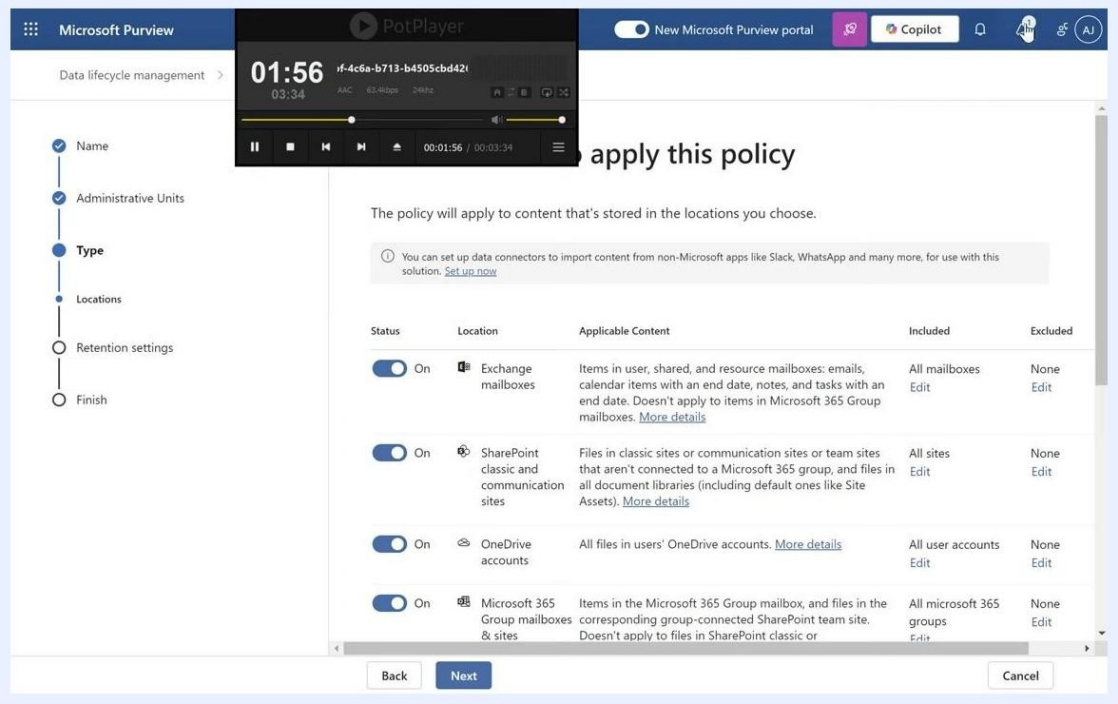
Microsoft Purview Locations step showing toggles for Exchange mailboxes, SharePoint sites, OneDrive accounts, and Microsoft 365 group mailboxes & sites, all set to "On".

Step 8: Configure retention settings

On the Retention settings step, configure the following:

- Select Retain items for a specific period.
- Set the retention period to 7 years.
- Set Start the retention period based on to When items were last modified.

- Under At the end of the retention period, select Do nothing, so content is not automatically deleted after 7 years.



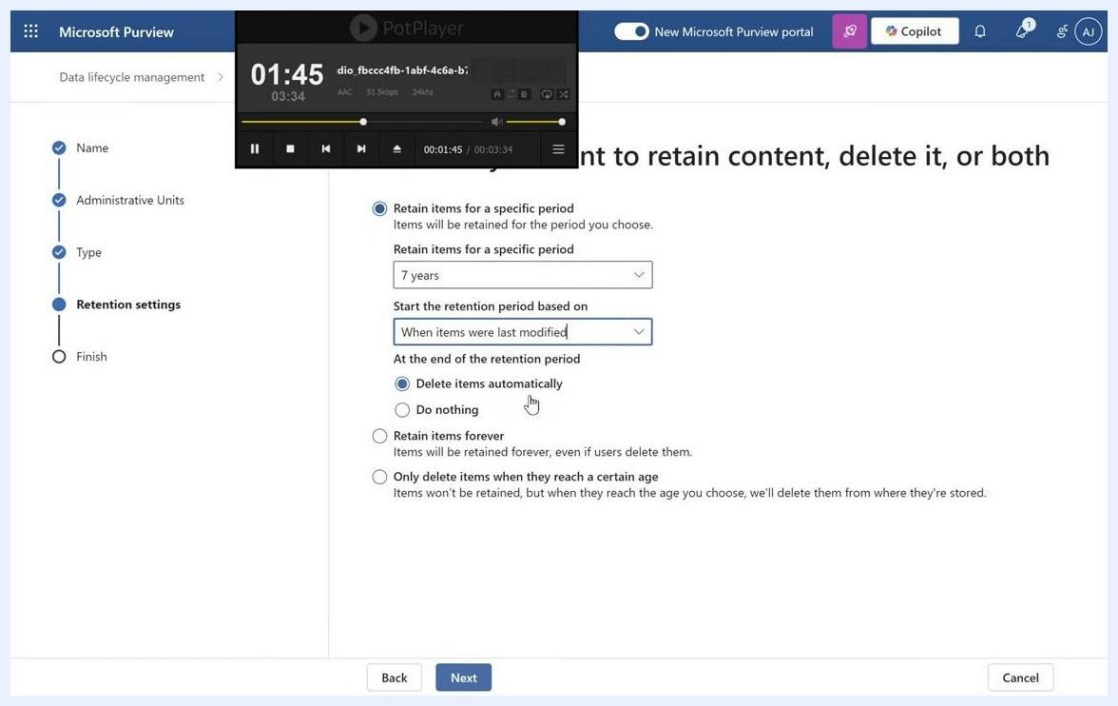
Microsoft Purview Retention settings step showing "Retain items for a specific period: 7 years", "Start the retention period based on: When items were last modified", and "Do nothing" selected for the end of the retention period.

Step 9: Review and submit the policy

On the Review and finish step, confirm the policy name, description, selected locations, and retention settings. The summary should show:

- Policy name: 7yr retention policy
- Locations: Exchange mailboxes (All Recipients), SharePoint classic and communication sites (All Sites), OneDrive accounts (All Sites), Microsoft 365 Group mailboxes & sites (All Groups)
- Retention settings: Retain items for 7 years based on when they were last modified; don't delete items at the end of the retention period

Click Submit to activate the policy.



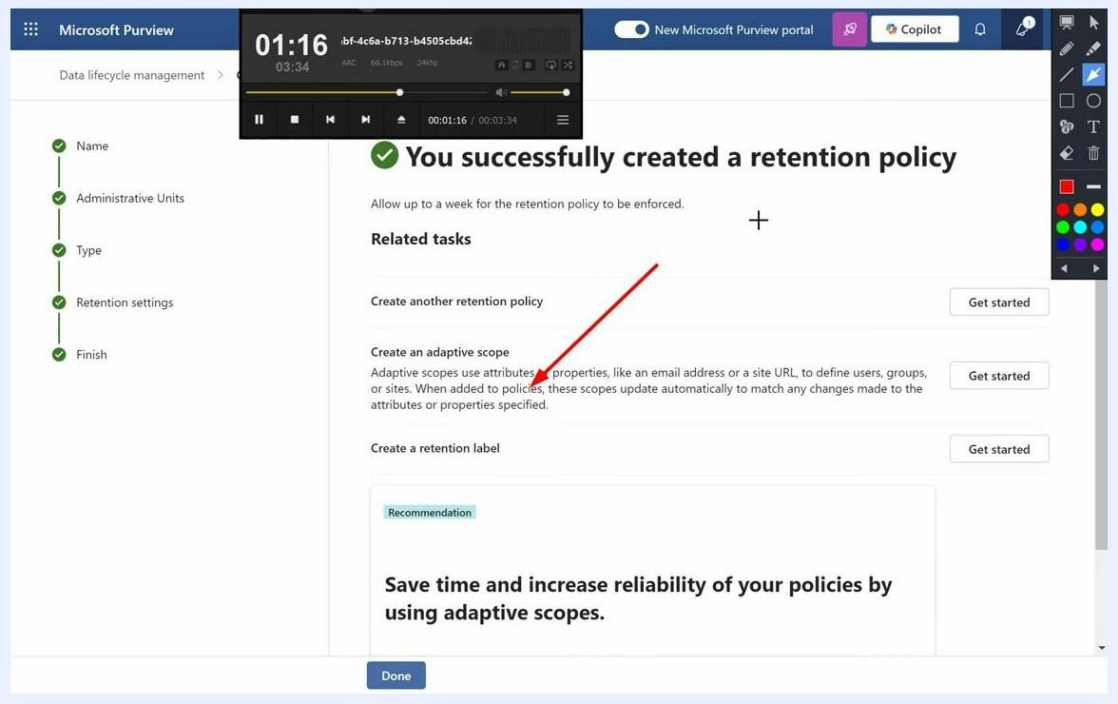
Microsoft Purview Review and finish step showing the policy summary with name, locations, and retention settings, with the policy being submitted.

Step 10: Confirm the policy was created

After submission, a confirmation screen indicates that the retention policy was successfully created. It can take up to a week for the policy to be enforced across all selected locations. From this screen, you can also access related tasks:

- Create another retention policy
- Create an adaptive scope, using attributes or properties (like email address or site URL) to define dynamic groups or sites for future policies

- Create a retention label, for more granular control over individual documents or items



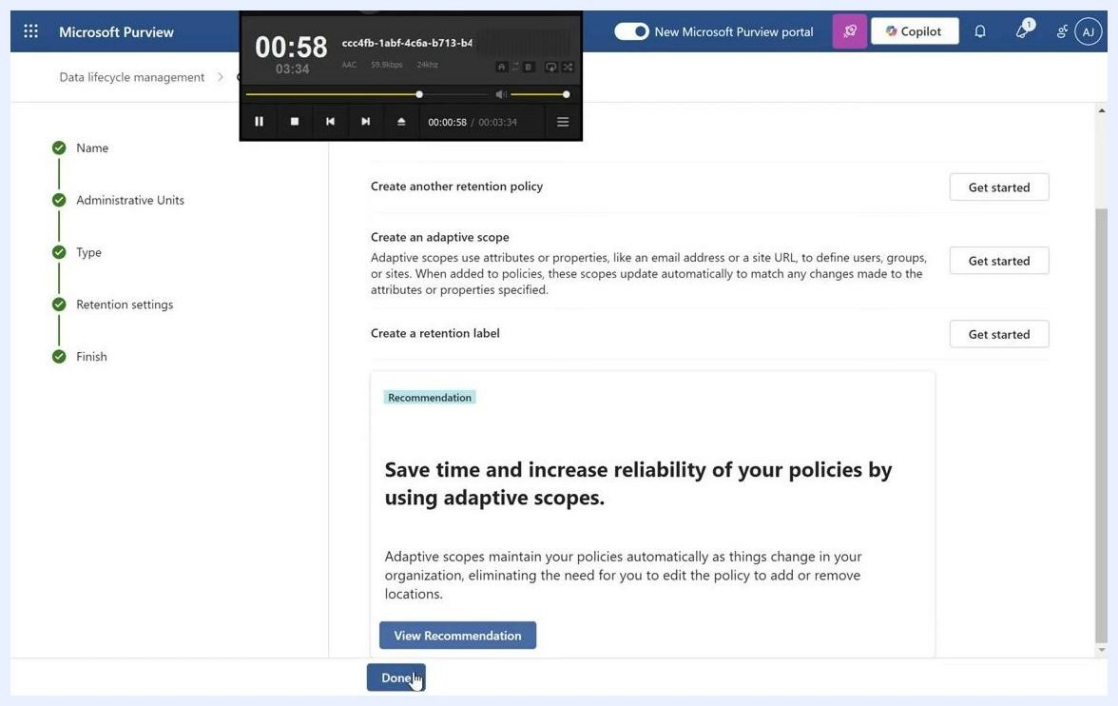
Microsoft Purview confirmation screen showing "You successfully created a retention policy" along with options to create another policy, an adaptive scope, or a retention label.

Step 11: Explore retention labels for more granular control

Retention labels give you finer control over data management than a broad policy alone. They let you:

- Specify custom retention durations for specific items.
- Apply longer or shorter retention periods as needed.
- Align retention with data sensitivity and classification to strengthen data governance.

To create one, click Get started next to "Create a retention label" on the confirmation screen.



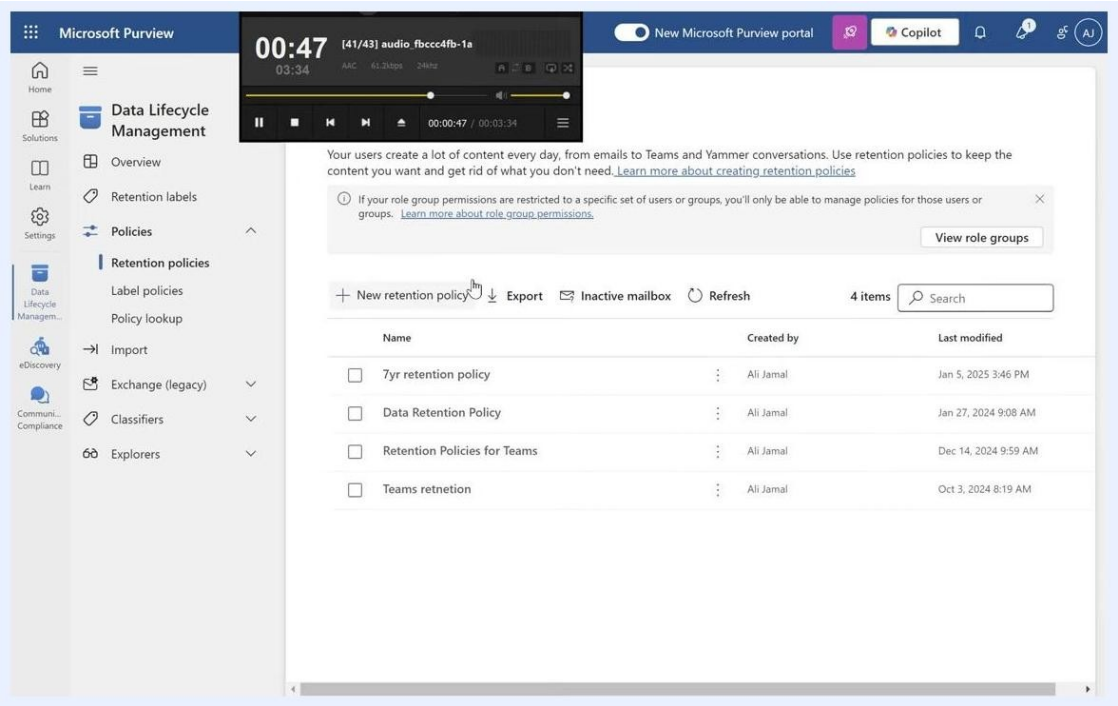
Microsoft Purview confirmation screen highlighting the "Create a retention label" option and the recommendation to "Save time and increase reliability of your policies by using adaptive scopes."

Understanding retention label application methods

Retention labels can be applied in two ways:

- Manual application: Users assign retention labels to emails, documents, or other items as needed.
- Automated application: Labels are applied automatically based on predefined criteria, such as keywords, sensitive information types, or specific locations.

Use automated labeling to ensure consistent compliance and reduce the burden on users, while still allowing manual labeling for exceptions or unique scenarios that automation doesn't cover.



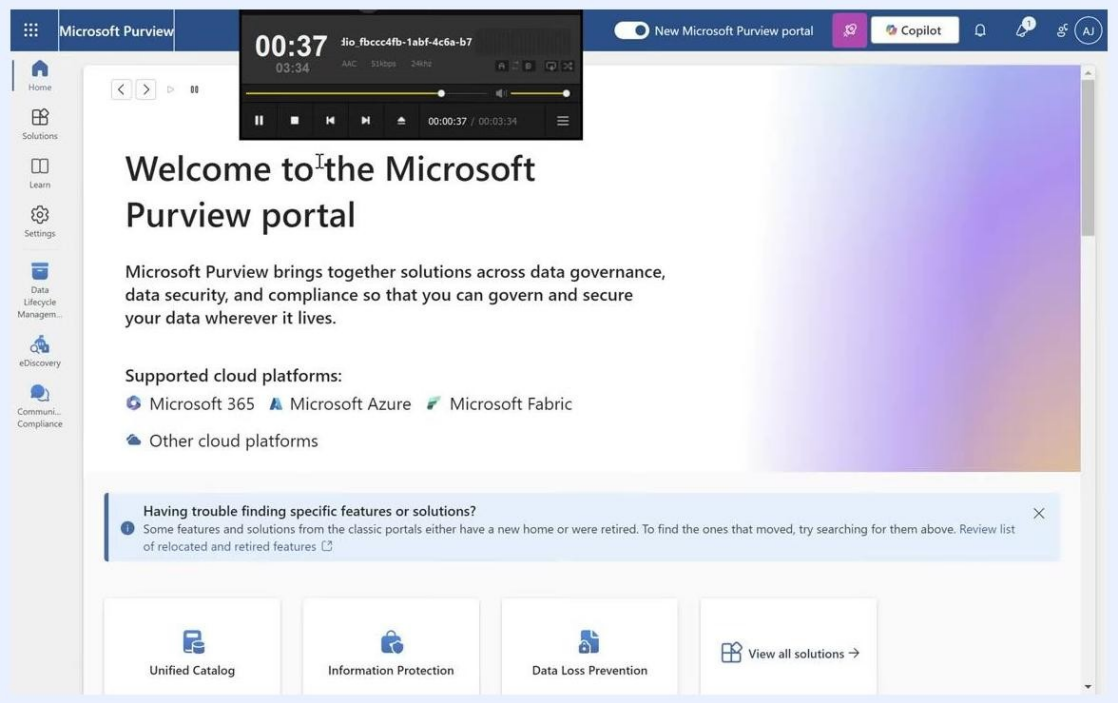
Microsoft Purview Data Lifecycle Management > Retention policies screen listing policies including "7yr retention policy," "Data Retention Policy," "Retention Policies for Teams," and "Teams retention," with the "+ New retention policy" button visible.

Best practices for retention management

- Use broad retention policies to cover general compliance requirements across your organization.
- Apply retention labels to handle exceptions or provide more granular control over specific items or locations.
- Regularly review your retention policies and labels to keep them aligned with evolving regulatory requirements and organizational needs.

Exploring the Microsoft Purview portal further

The Microsoft Purview portal supports data governance, security, and compliance across multiple cloud platforms, including Microsoft 365, Microsoft Azure, Microsoft Fabric, and other cloud platforms. From the main dashboard, you can access features such as Unified Catalog, Information Protection, Data Loss Prevention, and more.

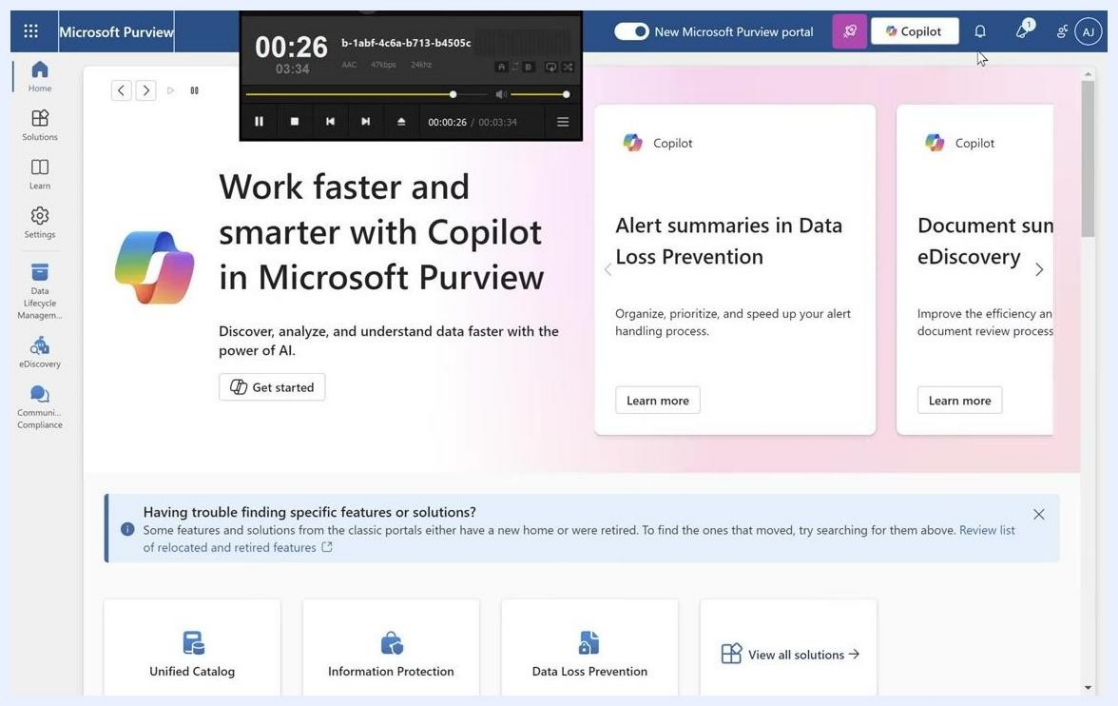


Microsoft Purview portal welcome screen showing supported cloud platforms (Microsoft 365, Azure, Fabric) and main dashboard tiles for Unified Catalog, Information Protection, Data Loss Prevention, and View all solutions.

Additional resources are available to enhance your data governance efforts:

- Copilot in Microsoft Purview: AI-powered tools to analyze, understand, and manage data faster.
- Alert summaries in Data Loss Prevention: Organize and prioritize alerts to speed up alert handling.
- Document summaries in eDiscovery: Improve efficiency in document review processes.

Click Get started or Learn more on the portal dashboard to access these features.



Microsoft Purview portal with Copilot features highlighted, including "Work faster and smarter with Copilot in Microsoft Purview," "Alert summaries in Data Loss Prevention," and "Document summaries in eDiscovery." Dashboard tiles for Unified Catalog, Information Protection, Data Loss Prevention, and View all solutions are visible.

Summary

You have now created a 7-year retention policy in Microsoft Purview covering Exchange, SharePoint, OneDrive, and Microsoft 365 group sites, helping ensure your organization's data is managed in line with compliance requirements. To further strengthen your data governance, consider using adaptive scopes for dynamic targeting and retention labels for more granular, flexible retention control.

What's next

- Periodically revisit your retention policies and labels to ensure they remain up to date with current compliance and business requirements.
- Adjust automated and manual label application as your organization's needs evolve.

- Use the Microsoft Purview portal on an ongoing basis to monitor and continuously improve your data lifecycle management.