How to Create a Retention Label in SharePoint

This guide explains how to create a retention label in SharePoint using the Office 365 Security & Compliance Center, publish it to your SharePoint sites, and apply it to documents. Retention labels help you manage how long content is kept and, when configured as records, prevent business users from deleting important files.

Prerequisites

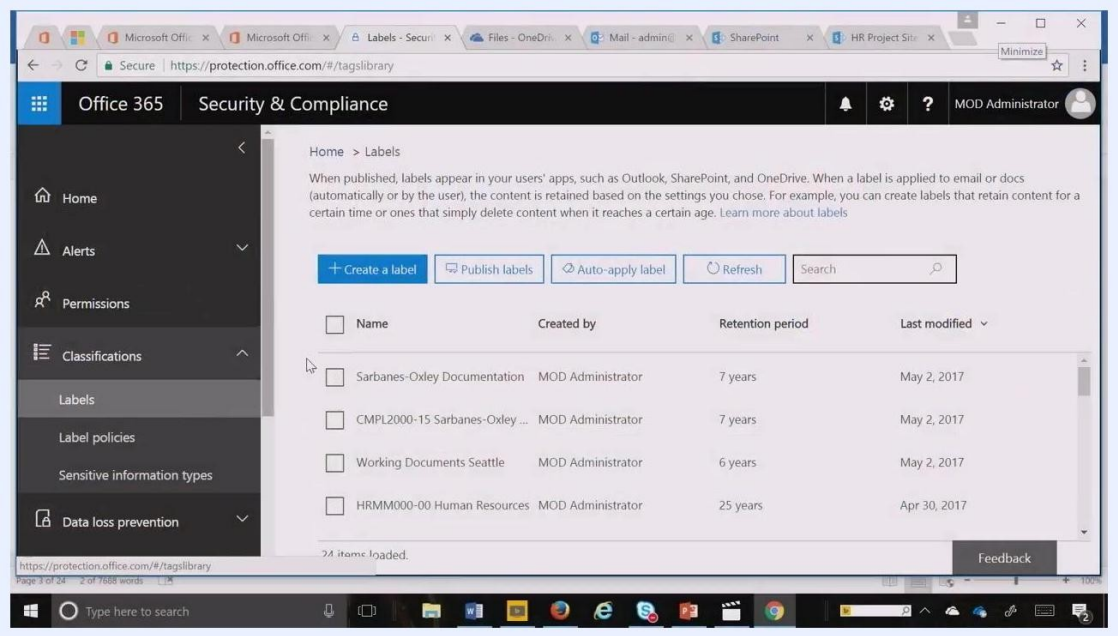
- Administrator credentials for Office 365.
- Access to the Office 365 Security & Compliance Center.
- A SharePoint site where the label will be applied (for example, an HR Project Site).

Step 1: Access the Office 365 Security & Compliance Center

Open your web browser and navigate to the Office 365 Security & Compliance Center. Log in using your administrator credentials.

Step 2: Navigate to the labels section

In the left navigation pane, select Classifications, then select Labels. You'll see a list of existing labels along with their creators, retention periods, and last modified dates. Click Create a label to start a new retention label.



Office 365 Security & Compliance Center with the Labels section open, showing existing labels and the "Create a label" button

Step 3: Name your label

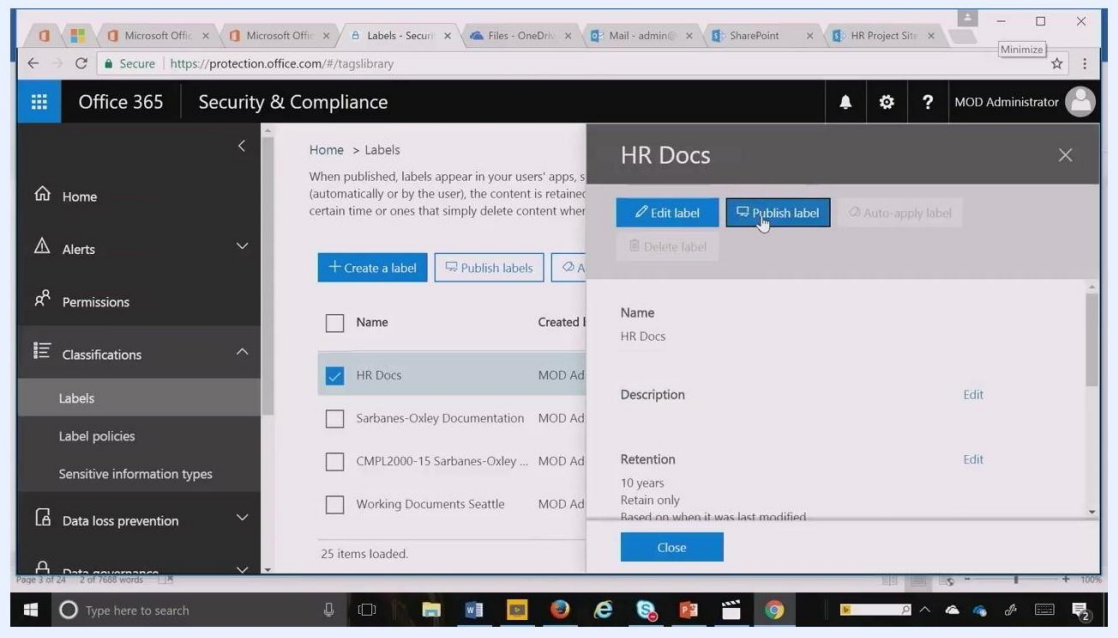
Enter a name for the label, such as HR Docs. Click Next to proceed.

Step 4: Configure label settings

Set the retention period—for example, 10 years. Under "Do you want us to delete it after this time?", select No to retain the content instead of deleting it.

In the "Retain or delete the content based on" dropdown, choose when it was last modified.

Optionally, to make the label immutable so that business users cannot delete the content, check Use label to classify content as a "Record". Click Next to continue.



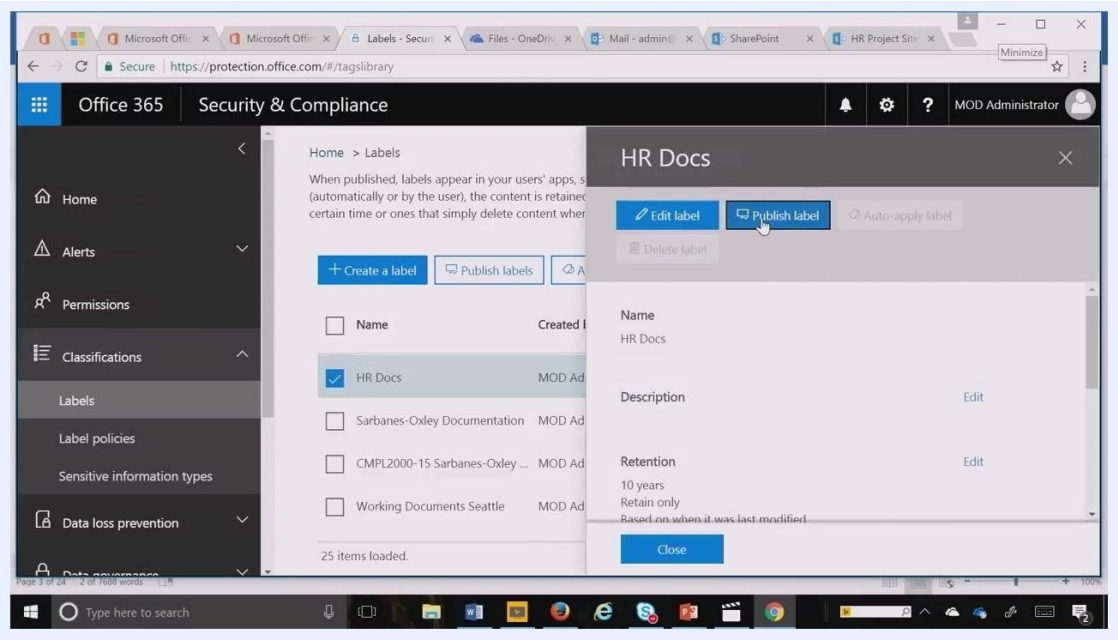
Label settings screen showing a 10-year retention period, retention based on last modified date, and "Use label to classify content as a Record" checked

Step 5: Review and create the label

Review your settings for accuracy, then click Create to finalize the label.

Step 6: Publish the label

After creating the label, select it from the list (for example, HR Docs), then click Publish label.

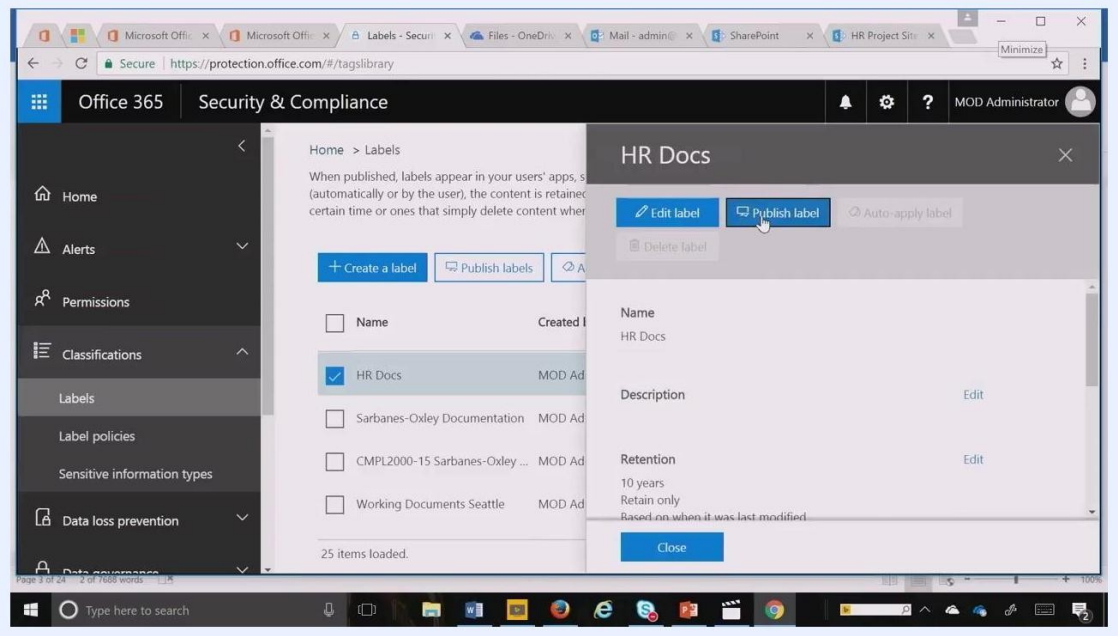


HR Docs label selected with the "Publish label" button highlighted

Step 7: Choose locations to publish the label

In the "Choose locations" step, select Let me choose specific locations. Turn on the toggle for SharePoint sites.

Optionally, turn off other locations such as OneDrive accounts and Office 365 groups if you only want to target SharePoint. Click Next.



Choose locations screen with SharePoint sites enabled, and OneDrive and Office 365 groups disabled

Step 8: Name your policy

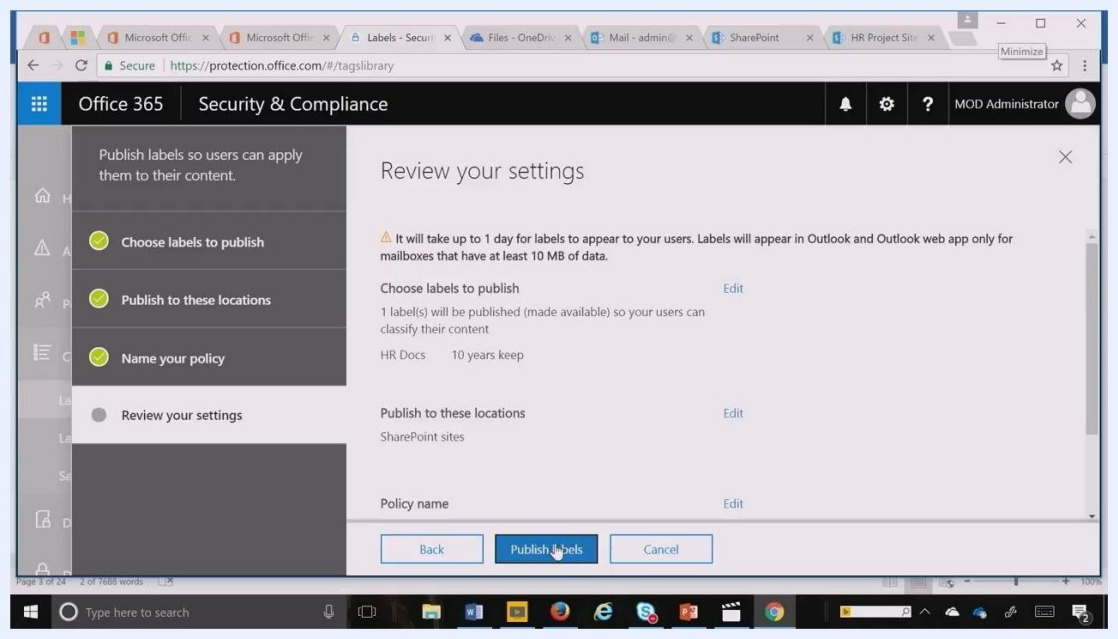
Enter a name for the policy, such as HR Docs, then click Next.

Step 9: Review your settings and publish

Review the summary, which should show:

- Choose labels to publish: HR Docs, 10 years keep
- Publish to these locations: SharePoint sites
- Policy name: HR Docs

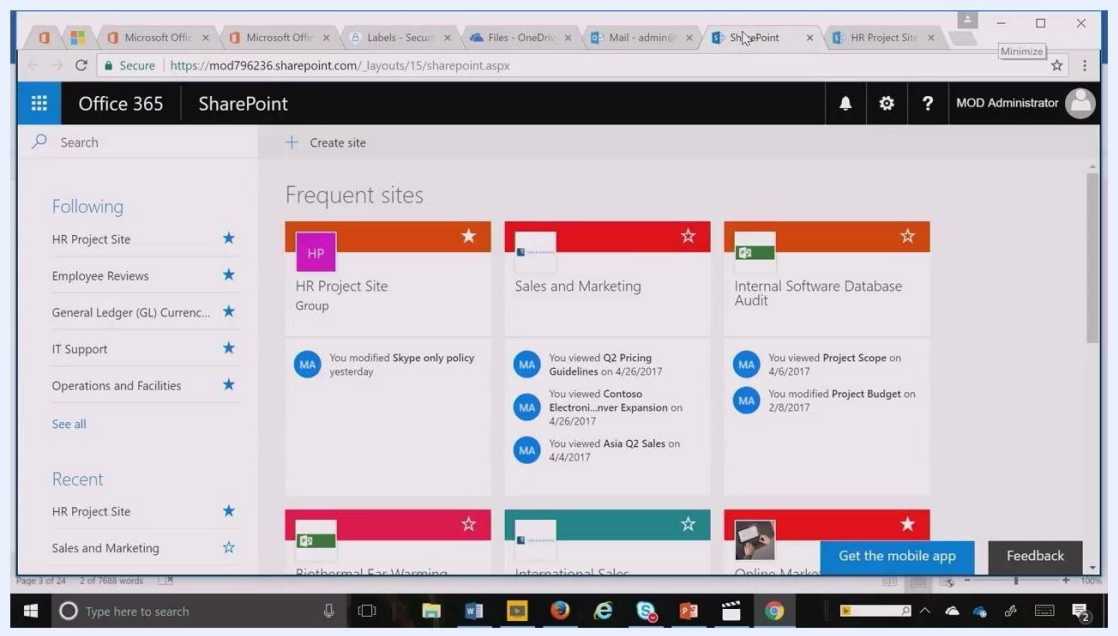
Click Publish labels to complete the process.



Review your settings screen with the HR Docs label, SharePoint sites location, and the Publish labels button highlighted

Step 10: Verify the label in SharePoint

Go to your Office 365 SharePoint portal. Navigate to the site where you published the label, such as the HR Project Site. Confirm that the retention label is now available for use on documents within the site.



SharePoint portal showing frequent sites, including the HR Project Site

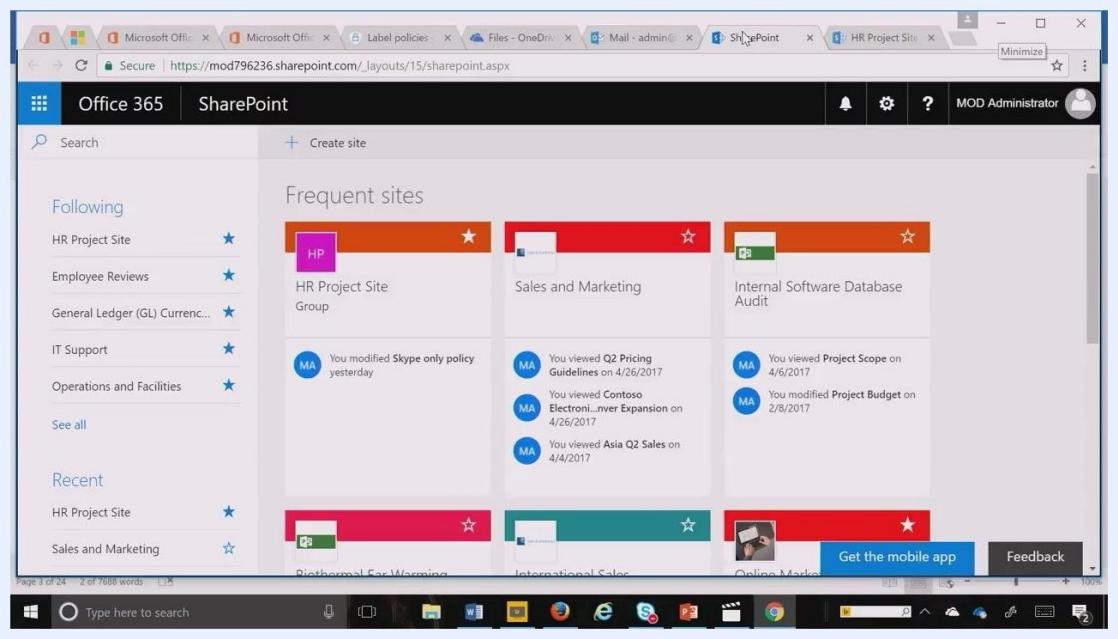
At this point, you have created and published a retention label for SharePoint. The label retains documents based on their last modified date and, if configured as a record, prevents business users from deleting them.

Applying the retention label to a document

Once your label is published, you can apply it directly to documents in SharePoint. The following steps walk through applying and verifying the label on a specific file.

Step 1: Navigate to your SharePoint site

Open your web browser and go to your Office 365 SharePoint portal. Locate and click your target site, such as HR Project Site, from the "Frequent sites" section.



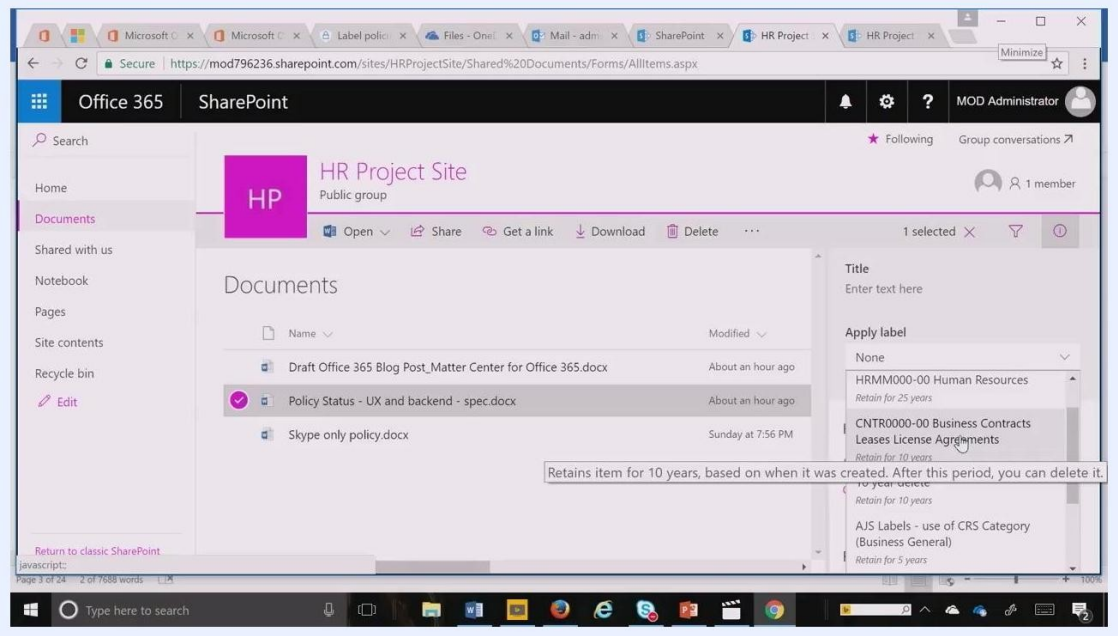
SharePoint portal showing frequent sites, including the HR Project Site, with the user about to select it

Step 2: Access the document library

In the left navigation pane, click Documents to open the document library for your site. Review the list of available documents.

Step 3: Select the document to apply retention

Click the document you want to label—for example, Policy Status - UX and backend - spec.docx. The document will be highlighted, and additional options will appear.



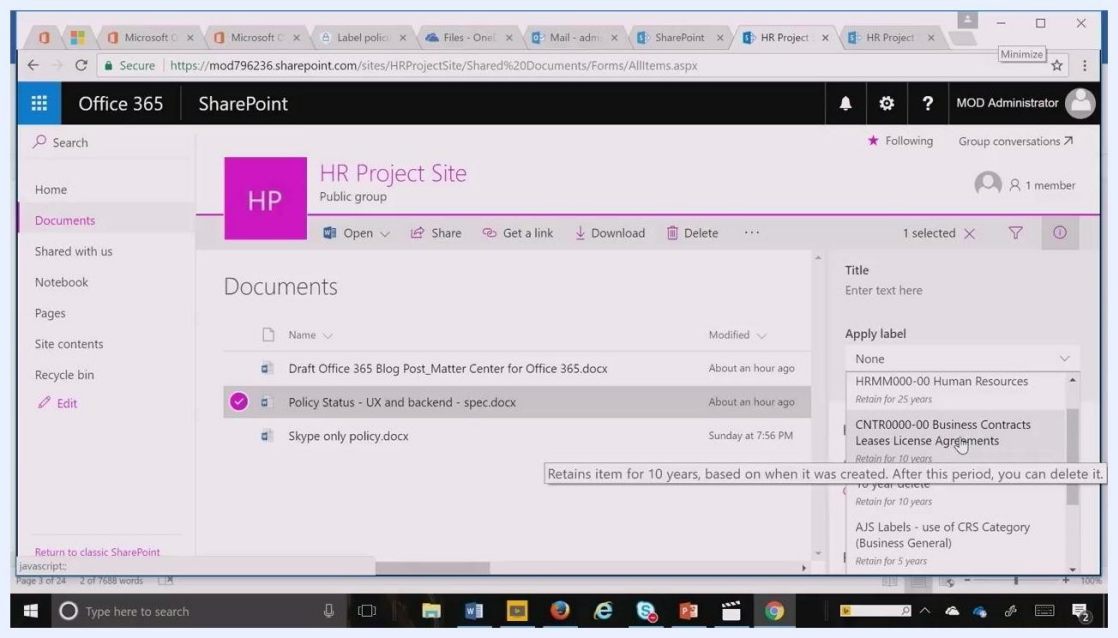
HR Project Site document library with "Policy Status - UX and backend - spec.docx" selected

Step 4: Open the information panel

With the document selected, an information panel appears on the right side of the screen. Locate the Apply label dropdown within this panel.

Step 5: Apply the retention label

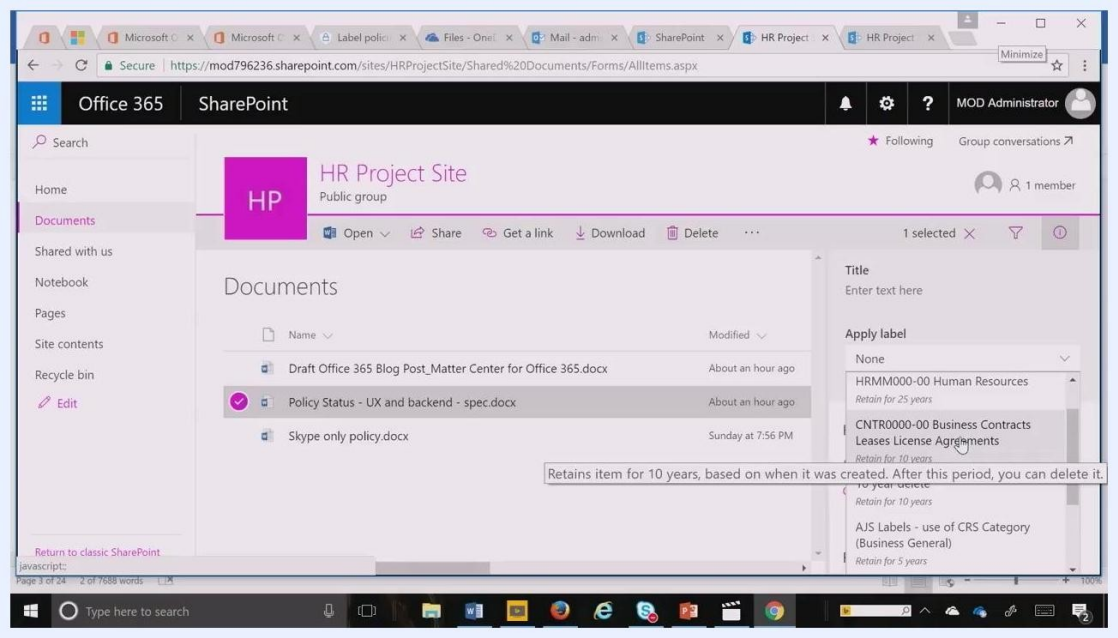
Click the Apply label dropdown and select the appropriate label from the list—for example, HR Docs, or another relevant label such as "HRMM0000-00 Human Resources" or "CNTR0000-00 Business Contracts Leases License Agreements." The label is applied to the selected document.



Information panel open with the Apply label dropdown showing available retention labels

Step 6: Verify the label application

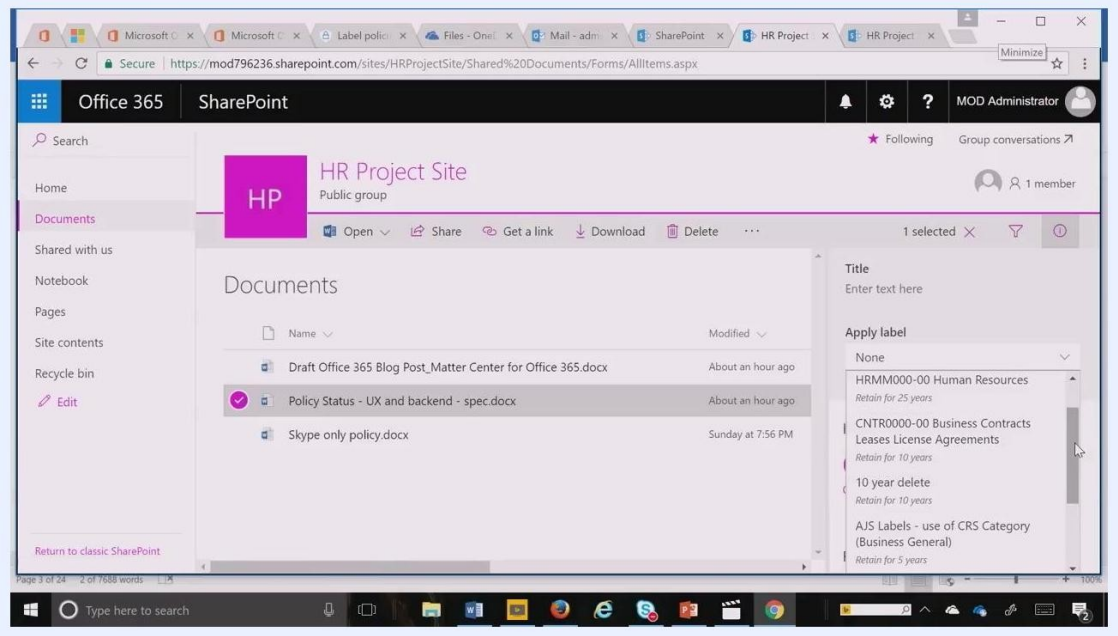
After applying the label, confirm it appears in the Labels column for the document. A tooltip or message may indicate the retention period and policy details, such as "Retains item for 10 years, based on when it was created. After this period, you can delete it."



Document library showing the applied label and retention details in the information panel

Step 7 (optional): Check immutability or record status

If the label was configured to classify content as a "Record," check the Item is a Record column. If the document is now a record, this column displays "Yes," indicating the document is immutable and cannot be deleted by business users.



Document library with "Item is a Record" and "Labels" columns visible, showing record status and applied label

Step 8: Repeat for additional documents as needed

Repeat the selection and labeling steps for any other documents that require retention labels.

Summary

You have now learned how to create a retention label in SharePoint, publish it to specific SharePoint sites, and apply it to individual documents. This process ensures documents are retained according to your organization's policies and, when configured for immutability, protects records from deletion by business users.