OLD DOMINION UNIVERSITY

Retention Labels in OneDrive and SharePoint

Retention labels can be used in OneDrive and SharePoint (including Teams) to ensure that content is only stored for as long as necessary for university business. After a certain amount of time (determined by the label), files and folders that have been tagged are automatically deleted.

Available labels

- General 2 Years
 Content is automatically deleted two years after the label is applied.
- University Business 3 Years
 Content is automatically deleted three years after the label is applied.
- University Business 5 Years
 Content is automatically deleted five years after the label is applied.
- University Business 10 Years Content is automatically deleted ten years after the label is applied.

Adding retention labels

A retention label can be applied to a file or folder from the web interface of OneDrive or SharePoint.

1. Select a file or folder, and in the details pane, look for **Apply label**. (If you don't see the details pane, hit the button in the top right that looks like a lower-case i inside a circle.)

+ New \checkmark $\overleftarrow{\uparrow}$ Upload \checkmark \boxplus Edit in grid view	/ 🖻 Share 🔏 Copy link	🕄 🔀 Sync	$\cdots \equiv$ All Documents $\lor \nabla$		= All Documents \lor \heartsuit \bigcirc \checkmark	
Documents > General			⊂ General	×	Properties Edit all	
🗋 Name \vee	Modified \vee	Modified E	None None Clear the label	~	Test 2	
Test Word Doc.docx	About an hour ago	angers. D	1. General 2 Years Delete after 2 years 2. University Business 3 Years		Name * Test 2	
			Delete after 3 years 3. University Business 5 Years Delete after 5 years 4. University Business 10 Years			

Label behavior

- In general, you should apply labels at the folder level, placing files within these folders.
- Unlabeled files and subfolders placed in a labeled folder inherit the label of the parent folder.
- Labeled files and subfolders placed in a labeled folder retain their original label, not the label of the parent folder.
- Labels do not prevent content from being manually deleted.

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Working with retention labels

- **Update retention labels manually if you move a file:** Unlike retention tags in ODU email, items in OneDrive and SharePoint will retain the label they inherit from their parent folder *even if they are moved elsewhere*. If you create a new document inside a folder that has the **1. General 2 Years** label and later decide to move the file to a folder with a longer retention period, you need to update the label on the item *manually* after moving it.
- Set retention labels on items in a shared library: Retention label information for shared libraries can only be viewed or modified by going to the SharePoint site of the Shared Library. You can find a Go to site -> link in the top right when viewing these libraries.
- **Update labels on multiple files:** If you update the label for a folder, *only new or unlabeled items placed into the folder will inherit the new label.* Any items already in the folder will need to be updated manually. You can select multiple documents and change their labels all at once.

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Docu	ıments > General > Test 2					↑ 4 items selected ×
	🗋 Name 🗸	м	Aodified \vee	Modified By $^{\smallsetminus}$	+ Add column \vee	Bulk edit properties
	Test 3	Ye	esterday at 12:53 PM			None
0	Hello.docx	iể : 51	hours ago			Save
0	Test.docx	iể : Ye	esterday at 12:32 PM			
0	test2.docx [™]	i	hours ago			
0	Test3.docx	i	few seconds ago			

 Check a file's expiration date: To see when an item will be deleted by retention, right-click on the file and select More -> Compliance Details. You can see the file's Label Status (the label that has been assigned to the file) and its Expiration Status (the date that the item is scheduled to be deleted).

Compliance details				×				
Use this dialog to determine what retention stage an item is in. You can also take action to keep this item in compliance with organizational policy.								
Retention Stages								
Event	Action	Recurrence	Scheduled occurrence date					
This item is not subject to a retention policy								
Name	Test.docx							
Content Type	Document							
Folder Path	Shared Documents/General							
Exemption Status	Not Exempt You cannot exempt/unexempt item from policy.							
Hold Status	Not on hold You cannot add/remove item from hold.							
In Place Records Management Status	Not an in place record You cannot declare/undeclare item as an in place record.							
Label Status	2. University Business 3 Years							
Expiration Status	Item will expire on 9/24/2023							

 View retention labels in column view: To help track retention, you can add the Retention Label and Retention Label Applied columns to your view. In SharePoint, click on All Documents -> Edit Current View and check the boxes next to the columns you would like to add. Then scroll down and hit OK.

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