

Adaptive Policy Scopes Launch

Roberto Yglesias
Principal PM Manager

Erica Toelle
Sr. Product Marketing Manager



Agenda



How retention works today

- Current workflow
- Location targeting and limits for policies

What are adaptive policy scopes?

- Dynamic targeting for policies
- Technical implementation
- Demo

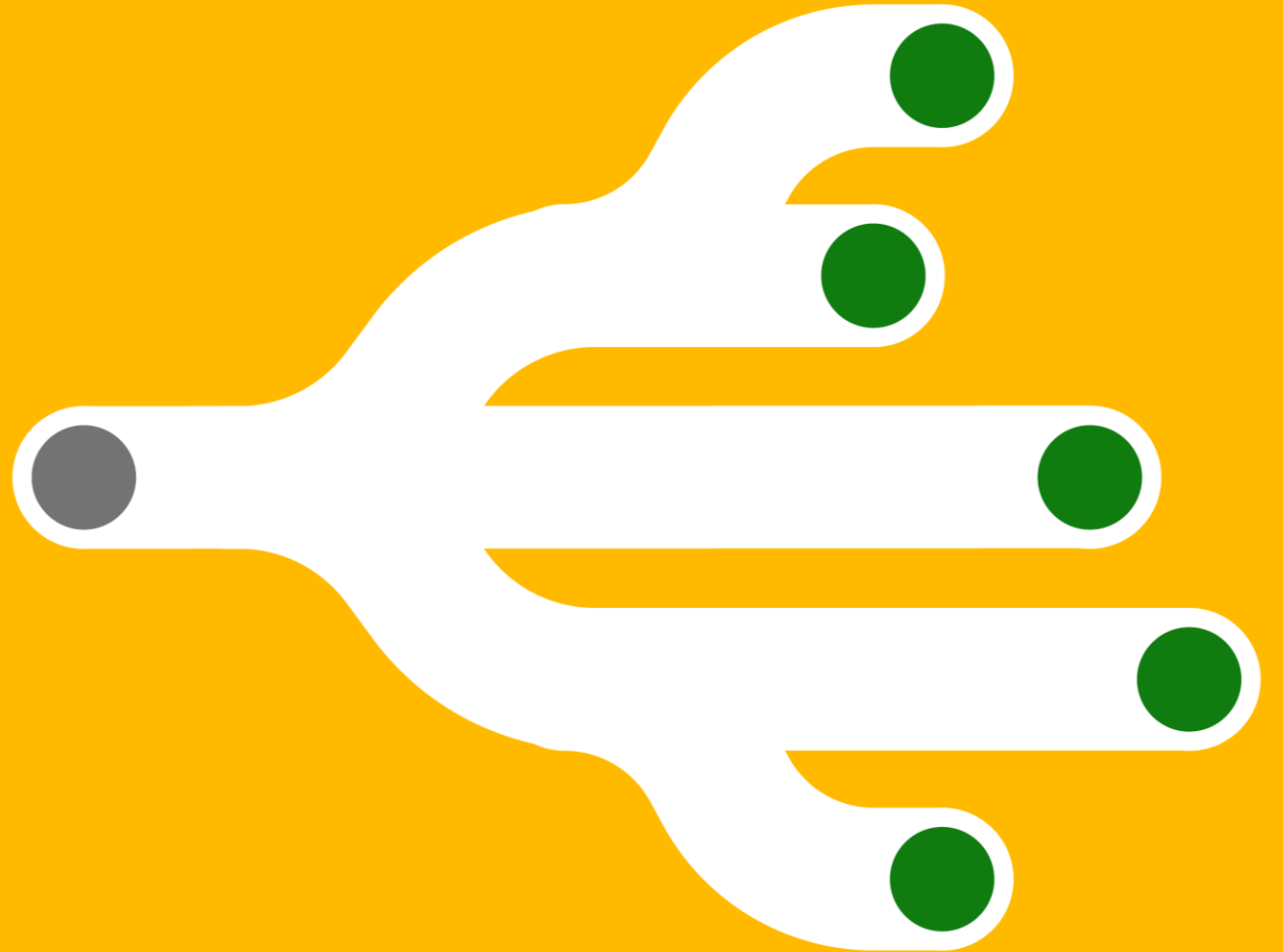
How can we use adaptive policy scopes?

- Target to individuals
- Target to geographies or departments
- Demos

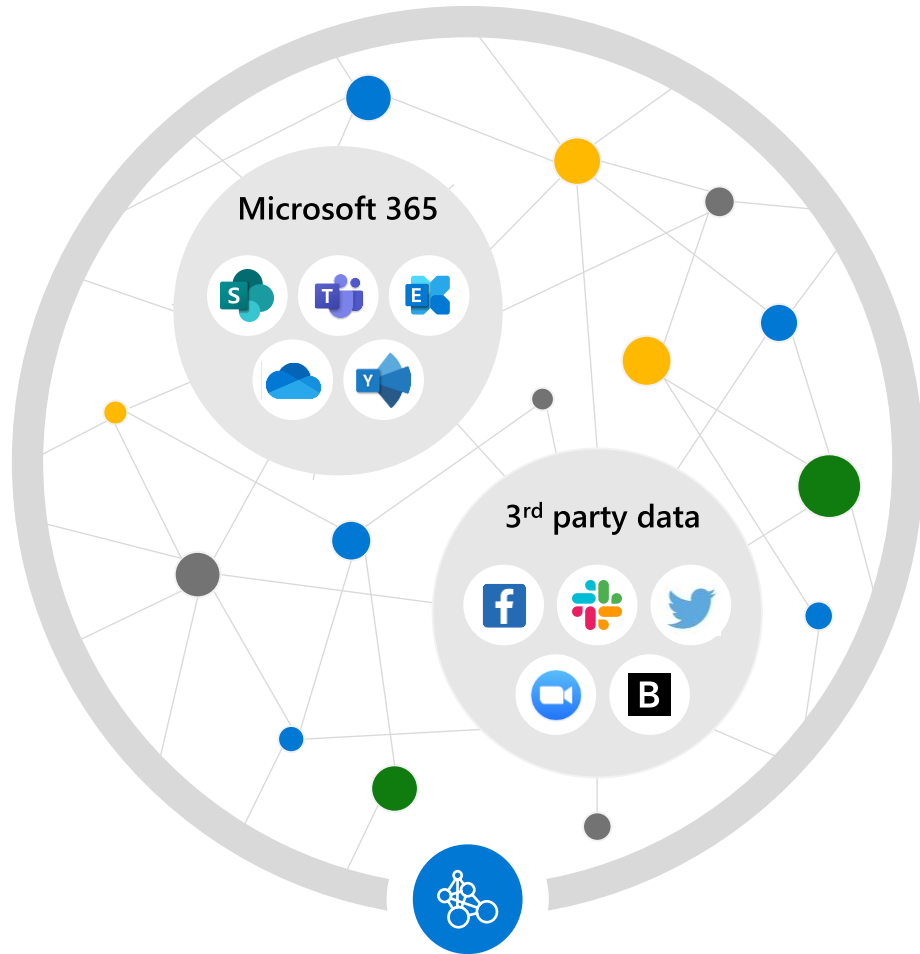
Resources

- How to get access to adaptive scopes
- Launch timeline
- Resources

**How retention
works now**



Classify and govern data at scale



Powered by an intelligent platform

- Retain data and manage records where users collaborate to prevent productivity loss
- Demonstrate compliance with label analytics insights, defensible disposal, and rich audit trails
- Manage third-party data import with pre-built data connectors*

*Pre-built data connectors include connectors built by Microsoft and by partners - TeleMessage and Globanet. Except for TeleMessage and Globanet, Microsoft does not have direct relationships with the data source companies in bringing these data connectors to the platform.

Current retention decisions

These are the general decisions you make when creating a retention policy or label policy.



What

Settings

Configure the retention and deletion settings



Where

Auto-apply or manual (labels)

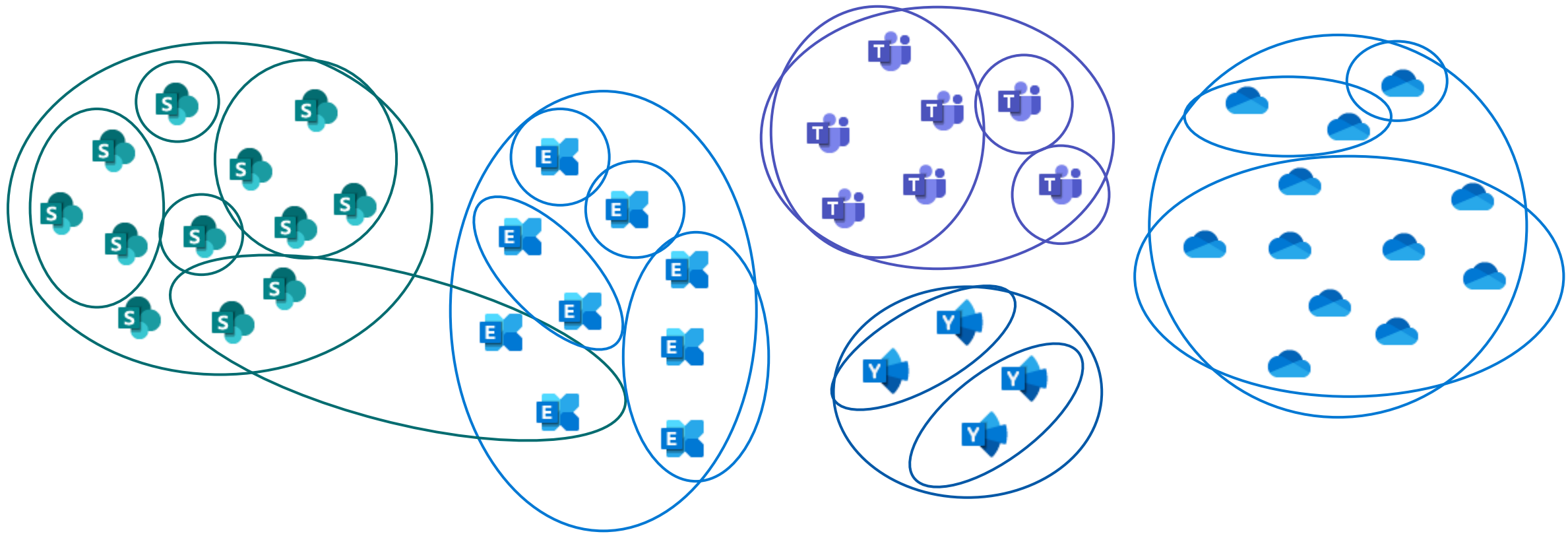
Decide whether the label is automatically or manually applied to content

Choose locations

Decide on the apps and locations and where the policy will be active

Include/exclude specific locations

Targeting policies in Microsoft 365 – static policy scope



Current include/exclude limits on static scopes

Note these limitations are per policy. If you need to use specific inclusions or exclusions that result in going over these numbers, you can create additional policies that have the same retention settings.

Application	Per-policy limit
SharePoint sites	100
OneDrive accounts	100
Exchange mailboxes	1,000
Microsoft 365 Groups	1,000
Teams channel messages	1,000
Teams chats	1,000
Yammer community messages	1,000
Yammer user messages	1,000

An evaluation of static scopes

Where they work well

- Policies for one or more entire app location, e.g., all Teams chats
- Small number of inclusions/exclusions which don't change often over time

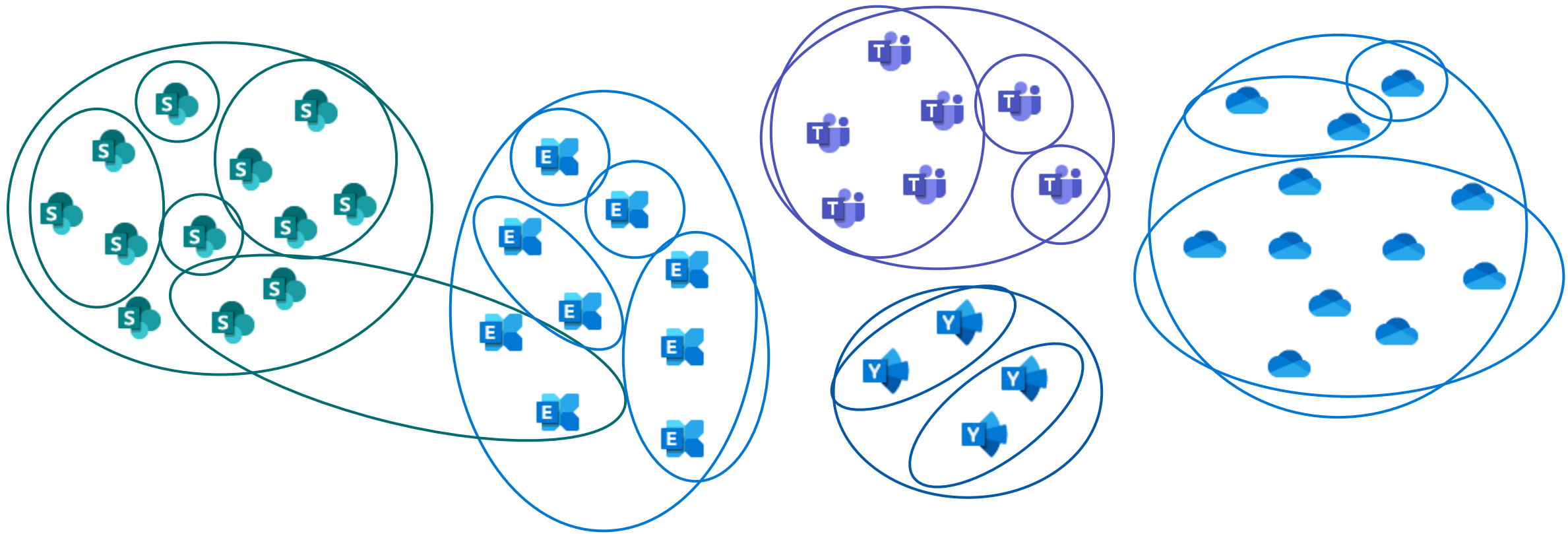
Where they do not work well

- Include/exclude policy limits – can require multiple policies
- Static scopes are not dynamically updated
- Targeting OneDrive URLs can be challenging
- Policies targeted to a department or geography
- Must build PowerShell to manage static scopes at scale

Introducing adaptive policy scopes



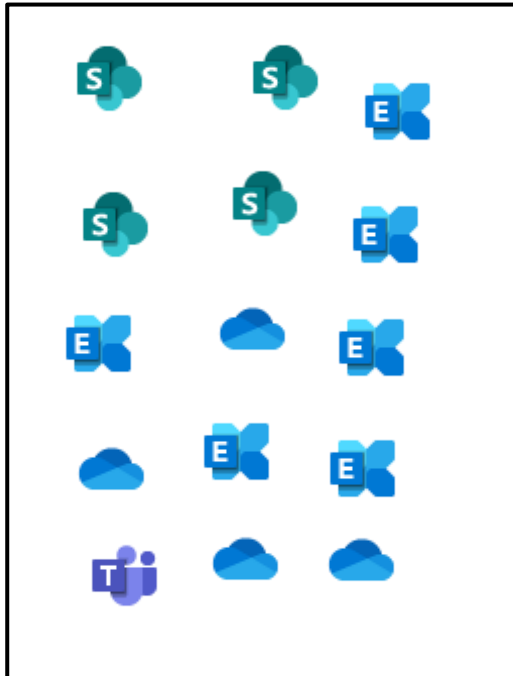
Targeting policies in – Static policy scopes



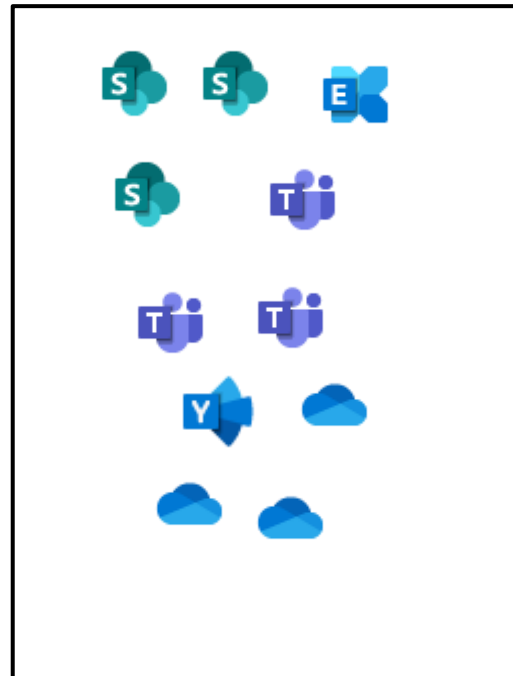
Targeting policies – Adaptive policy scopes



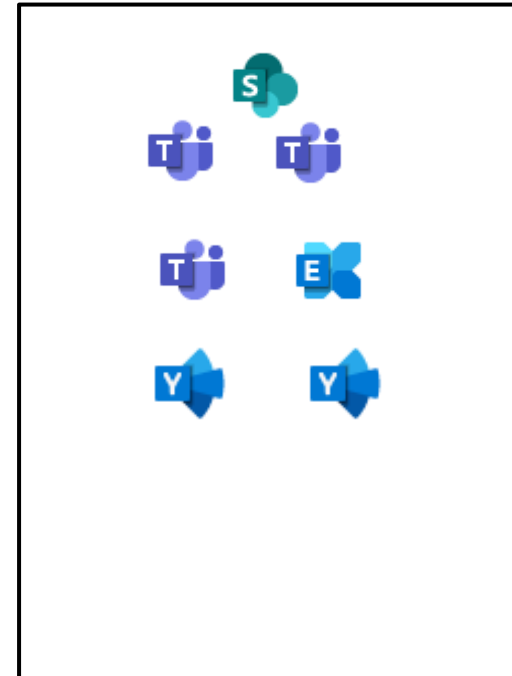
US Marketing



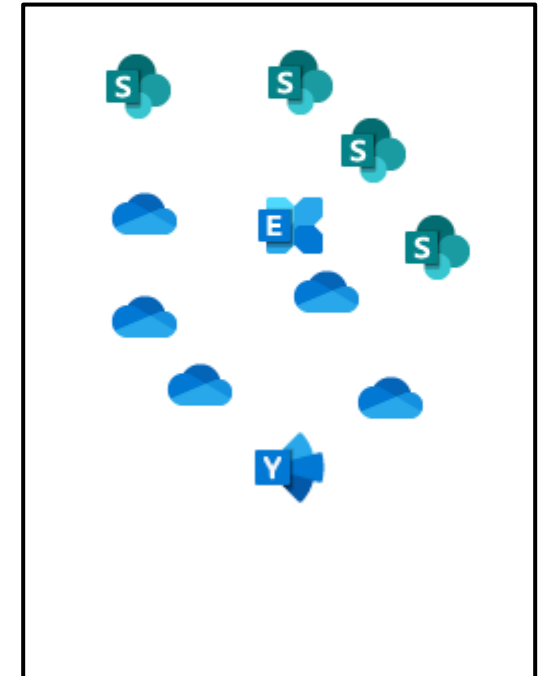
US Sales



Germany



UK



Adaptive policy scopes

Manage policy targeting with user, group, or site attributes



Automatic updates

Policies stay current as users join and leave roles



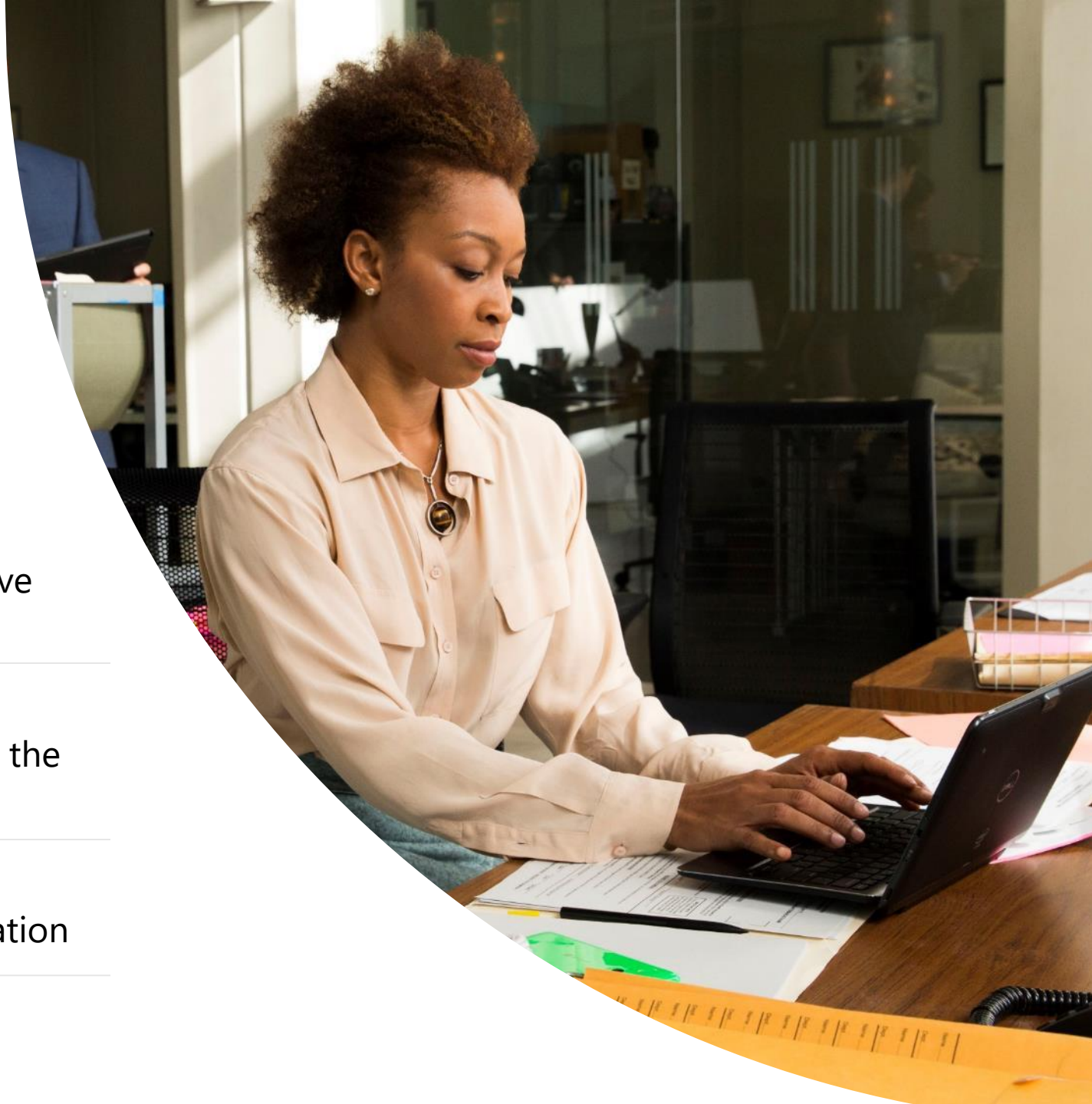
No more per-policy limits

Adaptive policy scopes are not subject to the previous include/exclude limits



New policy lookup

Understand which policy applies to a location



New retention decision

Adaptive policy scopes add a new “where” option,



What

Settings

Configure the retention and deletion settings



Where

**Auto-apply
or manual
(labels)**

Decide whether the label is automatically or manually applied to content



Policy Scope

Adaptive or static

**Choose
locations**

Decide on the apps and locations and where the policy will be active

Include/exclude specific locations

Demo: Create and use an adaptive policy scope

How are adaptive policy scopes updated?

Details of how adaptive policy scopes are dynamically updated.



Detect scope inclusion or exclusion

Determines if an adaptive policy scope manages the location, and which scope

The location is added or removed from a scope as needed



Apply retention settings to content

The retention service processes each location

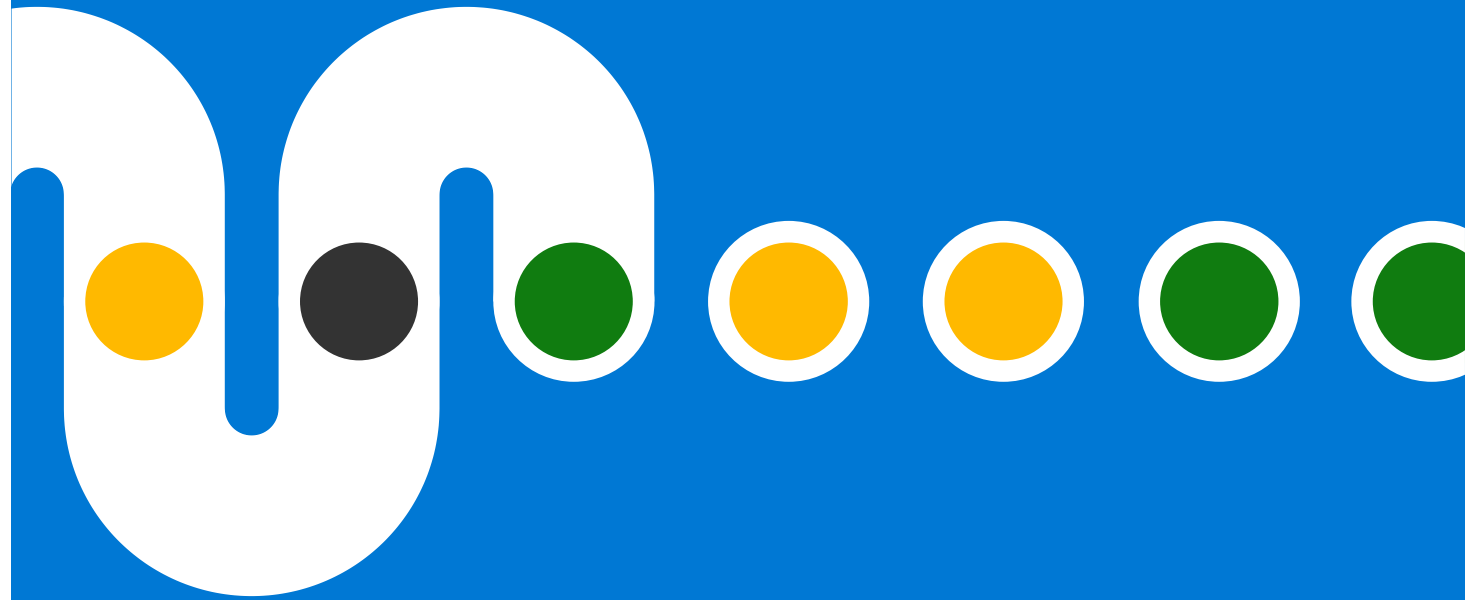
Once processed, the policy's retention settings will apply to the content

Scopes types & attribute options

Type	Locations supported	Available attributes
User	<ul style="list-style-type: none"> Exchange email OneDrive account Teams chats Teams private channel messages Yammer user messages 	<ul style="list-style-type: none"> First Name Last Name Display Name Job Title Department Office Street Address City State or Province Zip or Postal Code Country or region Email Address Aliases Custom Exchange attributes (CustomAttribute1 - CustomAttribute15)
Microsoft 365 Group	<ul style="list-style-type: none"> Microsoft 365 Group (mailbox, site, or both) Teams channel messages Yammer Community messages 	<ul style="list-style-type: none"> Name Display Name Description Email Addresses Alias Custom Exchange attributes (CustomAttribute1 - CustomAttribute15)
Sites	<ul style="list-style-type: none"> SharePoint site (group-connected or not) OneDrive account 	<ul style="list-style-type: none"> Name Site URL Custom attribute in property bag – Indexed (Refinable Strings 0-99)

Query Options
Operators for visual builder <ul style="list-style-type: none"> Is equal to Is not equal to Starts with Not starts with
Operators for advanced query builder <ul style="list-style-type: none"> and or not eq (equals) ne (not equal) lt (less than) gt (greater than) like (string comparison) notlike (string comparison)

How can you use
adaptive policy
scopes?



Example scenarios for adaptive policy scopes



1

Target to individuals

Some employees are required to have a longer retention policy than other employees.

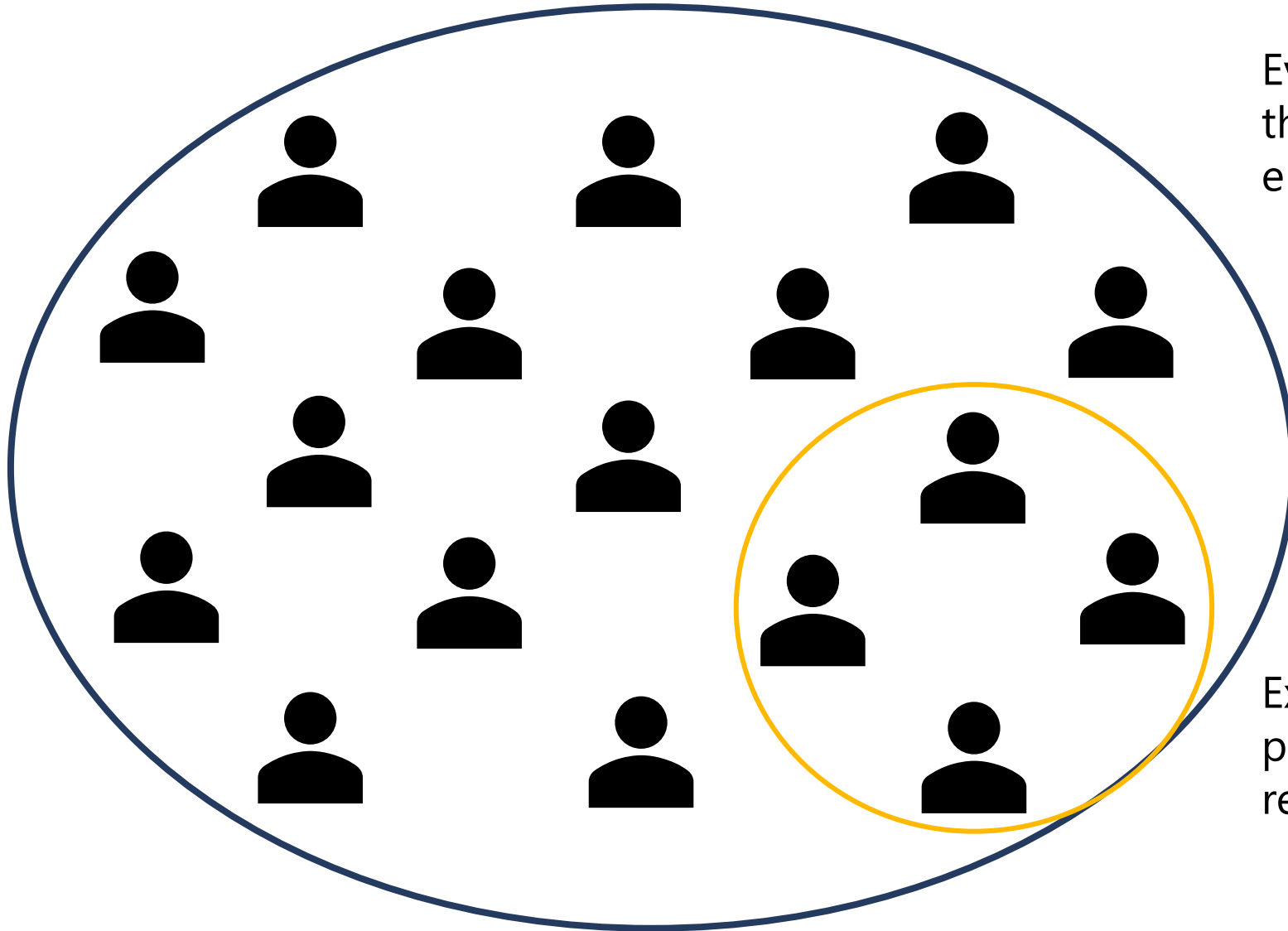


2

Target to a geography or department

Some countries have different retention laws and regulations. Some departments are subject to different laws and regulations.

1 Target to individuals



Everyone in the company has a three-year retention policy for emails and OneDrive documents.

Except for people in leadership positions who have a seven-year retention policy.

1

Target to individuals

These are the steps to create a three-year retention policy for everyone, except leadership, who get a seven-year retention policy.

Because of the [principles of retention](#), the seven-year policy will “win” for leadership.

A

Create a three-year retention policy

Use the static scope option.

Choose the location all Exchange mailboxes and all One Drive accounts.

Configure the settings to retain content for three years.

B

Create an adaptive policy scope

Select the Users scope.

Select attributes, such as Job title, Department, or a custom attribute.

C

Create a seven-year retention policy

Use the adaptive scope option.

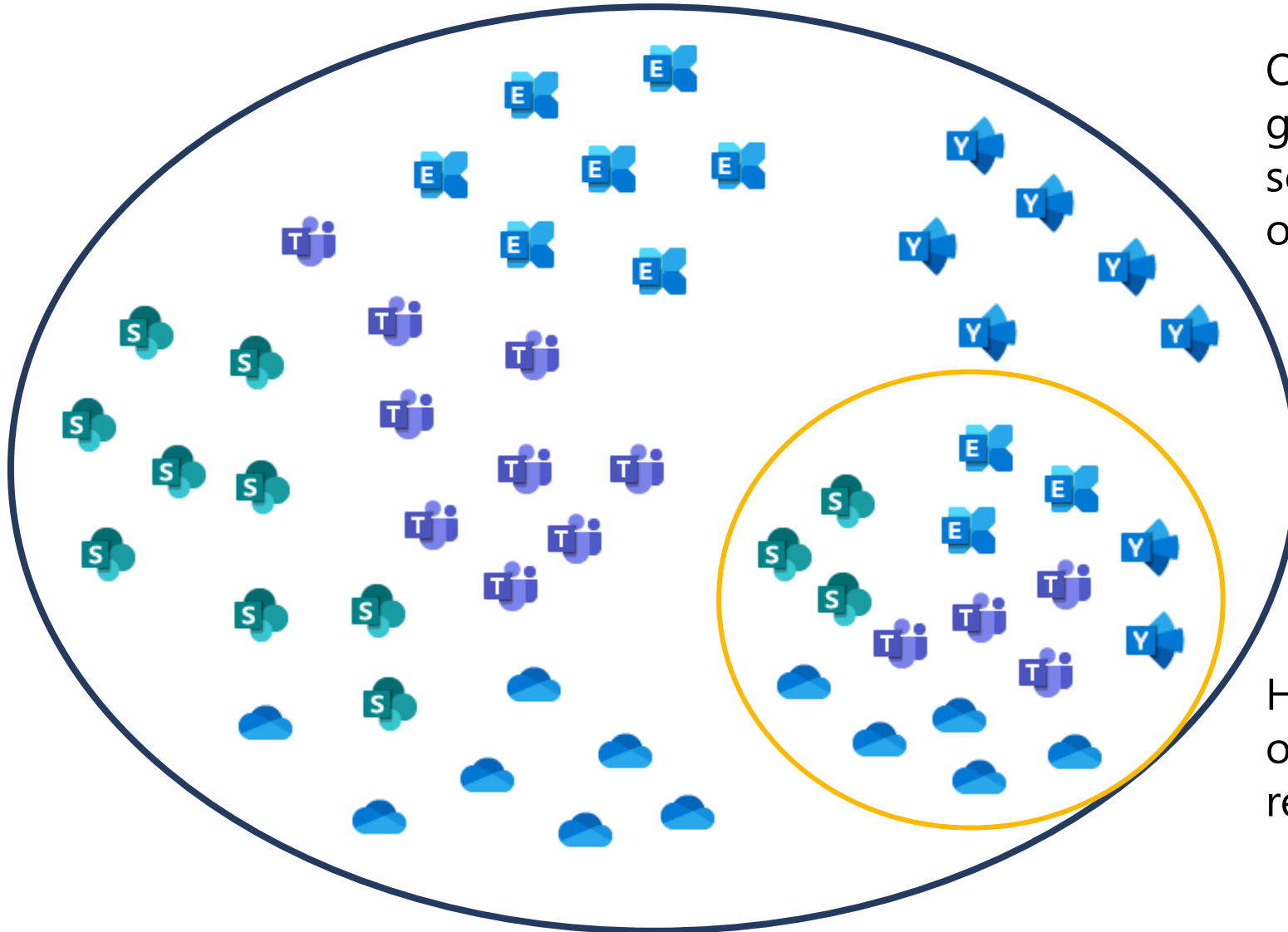
Use the adaptive scope you just created.

Choose the location all Exchange mailboxes and all One Drive accounts.

Configure the settings to retain content for seven years.

Demo: Target a policy to an individual

2 Target to geographies



Our example organization can generally use the same retention schedule for its world-wide operations.

However, their content for German operations must follow a different retention schedule.

2

Target to geographies

These are the steps to target retention policies only to German content.

For this example, we will use a seven-year policy for Germany.

A

Create three adaptive policy scopes

Create three scopes, one for each location:

- Users
- Microsoft 365 Groups
- Sites

B

Create 1 to 2 seven-year retention policies

Use the adaptive scope option.

Use the adaptive scopes you just created.

If you want to manage all locations:

- Create one policy for all Teams and Yammer locations
- Create a 2nd policy for Exchange, SharePoint, OneDrive, and Microsoft 365 Groups

Configure the settings to retain content for seven years.

Demo: Target a policy to a country

A note on managing Microsoft Teams (and Yammer)

Use the Microsoft 365 Group location to manage both Channel conversations and SharePoint files.

User interface

Channel
conversations



Location for compliance purposes

Channel files



Channel
conversations



1

Add a property to one of the Microsoft 365 Group custom attributes to use in the adaptive scope.

2

Create **one** adaptive policy scope for Microsoft 365 Groups. Use the custom attribute from step #1.

3

Create **two** retention policies for Microsoft 365 Groups and Teams channel messages using the adaptive policy scope from step #2.

Real-life customer examples

Teams channel messages

- Delete Teams channel messages based on regions
- Use a Microsoft 365 Group custom attribute to target the policy

Former employees

- Retain user mailbox and OneDrive for former employees
- Use a custom attribute to track who has left

Multi-national organization

- Each country operates independently for records management purposes
- Need to create boundaries across retention and content

Target labels to end users

- Want to target specific labels to users by region or department
- Users only see the labels applicable to them

When can I get this?

October 18, 2021

Resources

Deployment Guide

<https://aka.ms/MIG/Deployment>

Webinars

<https://aka.ms/MIG/Webinars>

Blog

<https://aka.ms/MIG/Blog>

Documentation

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