



Webinar FAQ: Deep Dive Adaptive Scopes

Prepared by:

Microsoft 365 Security & Compliance Team, September 21, 2021

- **View** the Microsoft Information Governance documentation for additional information: [Microsoft Information Governance in Microsoft 365 - Microsoft 365 Compliance | Microsoft Docs](#)
- **Sign up** for the MIP Preview Program: <https://aka.ms/MIP-Preview>
- **Follow** us on twitter: twitter.com/MIPnews
- **Watch** previous webinars: <http://aka.ms/MIPC/webinars>

Features & Capabilities

Q: How does this work with retention policies and exemptions where they possibly would be greater than 1000 users for exemption to policies?

A: Yes! Adaptive scopes can help resolve scenarios where greater than 1000 users must be included or excluded from a retention policy.

Q: Is there any guidance available on managing static scopes with scripting? We may need this before we migrate to adaptive scopes.

A: The Security and Compliance PowerShell Module currently supports several cmdlets that can be used in scripting such as `New/Get/Set-RetentionCompliancePolicy` and `New/Get/Set-RetentionComplianceRule`.

Q: What if a user needs to work between two continents and must be compliant?

A: A user can be a part of several different scopes, which can help in these situations! Keep in mind the [Principles of Retention](#) will be honored when multiple policies apply to a single user.

Q: Will Adaptive policy scopes be included in file plan or will it have its own UI for ease of reviewing?

A: Adaptive scopes will be available for use in Retention Label policies, which can include Retention labels from your file plan.

Q: Will this be available in GCC in the same timeframe as commercial or delayed?

A: *We are currently planning for it to be released with similar timing as the WW release.*

Q: For user attributes, is this pulled from dynamic Azure AD?

A: *Yes, that is correct!*

Q: Is there a list of attributes that can be used to configure the scopes?

A: *Yes, it is included in the slide deck used for this webinar. You can find the deck at aka.ms/mipc/webinars.*

Q: Can I Target SharePoint sites, OneDrive, etc. using Security/M365 Groups?

A: *Adaptive scopes can apply to various attributes stored in AAD; however not group membership specifically. This provides a more dynamic and flexible mechanism without needing to maintain a security group.*

Q: Can a target policy also be defined by AAD group membership?

A: *For static scopes you can still use them to add everyone in a group but this won't maintain them automatically. For dynamic scopes you can define the attributes which would put someone in the group.*

Q: Is the KQL language the same as advanced hunting?

A: *KQL will be the same as what is used for searching in [SharePoint search](#).*

Q: Can adaptive policy scopes use the same attribute that is set for the Preferred Data Location on Multi-Geo?

A: *No, that isn't currently an available attribute. A slide on the available attributes is included in the slide deck. You can find the deck at aka.ms/mipc/webinars. You could, however, use `customAttributes` to filter on this with some scripting.*

Q: For the policy lookup, can you plan to implement a new retention policy and see what data is in scope?

A: *Policy lookup will show what policies apply to a user, site, or group – however not the data itself. We appreciate the feedback on future improvements.*

Q: Is there a roadmap for AAD groups to be included?

A: *Not at this time.*

Q: When we say "automatically", this relies on a separate provisioning/deprovisioning process responsible for attribute management, correct?

A: Depending on your environment, and the attributes or properties you choose to use – yes. For most organizations these attributes are already there for other purposes.

Q: How long does it take to propagate across the tenant, be it scope changes or user association with a particular policy? Generally speaking, it runs a job to apply some of these features?

A: Scope changes should update within a day typically, and it may take up to 7 days for policies to apply to locations.

Q: If a retention policy is applied to a user mailbox and then the user is deleted, will the policy settings still apply to the inactive mailbox, or will the user fall out of the policy scope?

A: Nothing changes from how retention currently works with inactive mailboxes. As long as the policy is applied before the user is removed/license removed, inactive mailboxes will be included, however new policies/scopes will not include inactive mailboxes (user was deleted before the scope was enabled).

Q: Will adaptive scope support preservation lock?

A: Not with the current release, however this is on our roadmap.

Q: What are the licensing requirements for adaptive policies?

A: It will be an E5-level feature.

Q: By E5, you mean "E5 Information Protection & Governance"?

A: There are several flavors of E5 license SKUs you can purchase. Microsoft 365 E5 Information Protection and Governance is one option, and there are several others. For more information refer to aka.ms/compliancesd

Q: And covered under E5 Advanced Compliance SKU?

A: Yes, We don't sell that SKU anymore, but if you already own it, it will include adaptive policy scopes.

Q: So adaptive scopes help to apply retention labels, don't they? I mean it is not possible to retain/delete Teams chats with them

A: Retention labels AND retention policies 😊. So yes, they can be used for Teams content.

Q: Adaptive scopes in the GCC?

A: Yes, it will be available for GCC.

Q: Does Adaptive Policy Scopes work with Regulatory Records?

A: Yes you can use adaptive policy scopes to publish regulatory record labels, however we won't support preservation lock on them yet.

Q: Can adaptive scope be used to filter by Mailbox type (We want to include only User Mailboxes within a country) and license? (We want to filter for users assigned with Enterprise License)

A: We should be able to filter based on all attributes available in <https://docs.microsoft.com/en-us/powershell/exchange/filter-properties>

Q: User is mailbox? Or any content the user authors?

A: User scopes refer to locations tied to AAD user objects - Exchange mailbox, OneDrive site, Teams Chat & Yammer messages, etc. Content stored in SharePoint (other than OneDrive) would be covered by a Site scope.

Q: What happens with documents that have retention policy of Belgium, and that user moves to US?

A: If a different scope and a different policy apply, then the user's content will be included in the new scope/policy. If you want to ensure the policy which applied at the time is the one that is preserved forever, you can use an auto-labeling policy and apply a retention label to the content (Belgium) and then auto-label with the new value after the scope changes (US).

Q: Is E5 required for every user coming within an adaptive scope?

A: Yes.

Q: What options are available to search for in scope SharePoint sites when setting the scope?

A: The deck had the reference to all supported attributes, you can access it at <aka.ms/mipc/webinars>

In short for SPO we support RefinableString00-99 and a few other attributes like URL, Name, etc.

Q: Does Adaptive Policy Scopes work with Disposition?

A: You can use adaptive policy scopes to identify users, sites or groups to publish a label that triggers disposition review, yes. However, adaptive scopes cannot be used within the disposition reviewers configuration of a label.

Q: Will it be possible to filter for content? In other words, filter out which content to retain and which to delete? Especially Teams chats?

A: Adaptive policy scopes are used to filter for users, sites or groups in which apply policies, not specific messages or content, for that you can use retention labels and auto-labeling policies however these are not yet available in Teams.

Q: How does static --> adaptive retention migration look like to make sure users don't go out of compliance when we migrate from/delete static retention policies?

A: Just like adding other retention policies that may affect similar users, it would be recommended to create the new policy first, and give it time to apply, before removing the old policy.

Q: Can you use more than one adaptive scope?

A: *Of course!*

Q: Why so many options: Compliance Boundaries, Adaptive Scopes, Info barriers, etc.... all seem to be addressing the same sort of request for different features.

A: *All of these have different purposes:*

- *Compliance boundaries are used for eDiscovery, to prevent admins from searching across logical boundaries within an organization – such as subsidiaries. These are basically a search filter.*
- *Information barriers are used to prevent user communication between logical barriers – such as preventing anyone from a stock trading group from communicating with marketing or sales. They act as walls within an organization.*
- *Adaptive policy scopes allow you to scope users, sites or groups in which a retention policy should apply. There is no prevention of access or communication with adaptive policy scopes. It is simply used to manage the scope of policies.*

Q: More than one at a time?

A: *Yes, you can add multiple scopes to a policy.*

Q: How do we handle the legacy application of retention policies on people whose scope has changed? For example, a person is in a group where we want 2 years of retention. They change roles and are out of scope. I don't want to retain their new content, but I still want to retain their data when they were in the role that had the 2 year retention. Will the service preserve the prior membership data for the length of the legacy retention period?

A: *For that scenario, use retention labels to label the individual pieces of content, rather than retention policies, which apply retention to the container. You can use an auto-labeling policy to ensure this labeling is done automatically.*

Q: Would it be the same for A licenses? In A5 or in A5 Security & Compliance?

A: *Yes, A5 should include adaptive policy scopes.*

Q: Can SharePoint adaptive scopes work on group-connected SharePoint sites?

A: *Yes.*

Q: Is there a way to get more granular with using AAD extension attributes vs native custom attributes? (e.g. we sync additional attributes to define a user's line of business in addition to the 'Department' attribute in AAD)

A: *You can use the default custom attributes available for users – CustomAttributes1-15 and ExtensionCustomAttributes1-5.*

Q: Does it allow Disposition Review?

A: You can use adaptive policy scopes to identify users, sites or groups to publish or auto-apply a label that triggers disposition review, yes. However, adaptive policy scopes cannot be used within the disposition reviewers configuration of a label.

Q: Can we mix a distribution list, and location for exemptions?

A: No, distribution lists don't work with any type of retention settings, static or adaptive scope. The only thing it can do is initially populate the list of inclusions/exclusions, but it isn't updated on an ongoing basis.

Q: Has an adaptive policy had a higher priority than a static Container label? (Explicit higher than implicit)

A: No, the principles of retention always apply, an adaptive scope has the same explicitness level as a static policy which uses a static scope to include/exclude locations:

<https://docs.microsoft.com/en-us/microsoft-365/compliance/retention?view=o365-worldwide#the-principles-of-retention-or-what-takes-precedence>

Q: What if we want to have exceptions to the policy applied based on the AD Attribute?

A: You can exclude by configuring the scope to exclude objects based on attributes or properties.

Q: Any news/information if/when KQL will be possible on Teams retention rules (chats/channel messages)?

A: It's something we are considering (the ability to label a Teams message) but isn't something we have an ETA on.

Q: With the introduction of this, is there any plans to increase the frequency of the disposal timer job? At present this only runs once per week in M365.

A: Adaptive scopes does not change the frequency of the retention service. The service doesn't run once per week at this time, it runs much more frequently, however we set the expectation it may take up to 7 days for it to process as a conservative upper bound.

Q: Does Adaptive Scopes allow me to create a retention policy to preserve data if for example, custom attribute1 contains the word "Termed" (termed - 09-21-21)? I am looking for an automated way to preserve terminated employee data based on the word "termed" in Custom Attribute 1.

A: Yes! for both user and M365 group scopes. It won't allow you to base the retention period on the date however. For that, look at event-based retention and triggering an event per terminated employee.

Q: What is the recommendation for including SharePoint sites that all relate to specific departments and such if it is not in the location option?

A: You can map a custom property in the property bag to a RefinableString, then scope based on that. For example, you could create a property named 'Department', then map the corresponding crawled property to RefinableString00. At that point, whatever department value was specified in Department (once indexed) can be scoped.

Q: What if we just want exceptions who have the same AD attributes as the rest but for some reason need to be excepted from the policy?

A: You can build into your scope query exceptions based on other attributes or values like the user alias.

Q: Adaptive scopes doesn't show up on the roadmap yet for GCC High or DoD, only for GCC and commercial.

A: Correct. We will announce the release date for other government clouds as soon as we have a general availability date for commercial as we don't typically roll out preview features to GCC-H or DoD.

Q: Will other logical operators be added than equals and starts with?

A: You should be able to use [OPATH operators](#) for User/M365 Group and [KQL operators](#) for site using advanced queries. We definitely want to look into more operators in the future.

Q: Can policies with static and adaptive scope overlap and how are conflicts being handled if any?

A: They absolutely can and they will be resolved like all others through the principles of retention for this: <https://docs.microsoft.com/en-us/microsoft-365/compliance/retention?view=o365-worldwide#the-principles-of-retention-or-what-takes-precedence>

Q: Are wildcards supported for SharePoint site URLs?

A: You can use "starts with" for this purpose or any KQL query that would be supported.

Q: What if all your site does not currently have those custom properties?

A: We will be publishing guidance on how to implement new properties and add those properties to existing sites.

Q: Can we target site using Site Owners name in a specific country?

A: Yes, you would need to create your own customization to set the property bag properties of the SPO site based on the site owners and then use that for adaptive scopes.

Q: Updating the property bag values currently requires enabling custom scripting. Will this change in the future? Would the enablement of custom scripting be required?

A: We will provide guidance soon once we release the documentation. You do require to disable NoScript but can disable and re-enable immediately after setting the property value.

Q: If a person changes groups will their email retroactively update, or does it follow the previous scope used at the time it was created?

A: *If a user changes scope, then whatever policy applies to their mailbox will apply. For retention policies, this would include the entire mailbox - subject to the principles of retention (<https://docs.microsoft.com/en-us/microsoft-365/compliance/retention?view=o365-worldwide#the-principles-of-retention-or-what-takes-precedence>), of course. If you want to ensure only the new content follows the new scope, you can use auto-labeling policies.*

Q: For the example shown, what if you need to keep an email longer than the 3 year (static policy)?

A: *You could supply labels to users to increase retention time as needed on individual objects.*

Q: If you wanted to target SharePoint sites based on their hub-site association would you need to utilize RefinableStrings?

A: *Yes, we don't support Hub association yet.*

Q: How can we tell what policies apply to a specific person/group/site?

A: *Using the new policy lookup tool.*

Q: Is there a limit on number of attributes when defining a scope?

A: *Yes, there are limits to the complexity of a query, specifically:*

- *Total query size must not exceed 10,000 characters*
- *Total attributes must not exceed 200*
- *Total nested conditions must not exceed 3 levels*

Q: How can we tell when the policy has been applied to an entire tenant? Is there a Process Completed display somewhere?

A: *You can confirm what is covered by a scope through the "Scope details" screen shown and the "Policy Details" as well. We don't have a "process completed" display as new locations may be added all the time.*

Q: How long will it take for the scope to apply?

A: *It typically will take a day for a scope to include objects new objects. After that, the time it takes for a policy to apply doesn't change, still up to 7 days.*

Q: Can adaptive scopes apply labels to individual items, or are just policies at the container level??

A: *Yes, adaptive scopes can be used for label policies and auto-labeling policies*

Q: So, labels that were applied under one scope will persist if the scope changes?

A: If you use labels, yes. Once something is labeled, we do not automatically overwrite it using any method.

Q: Any plans to provide adaptive scopes to info protection (DLP/Sensitivity Labels)?

A: Not that we can share.

Q: Scenario: Our DP team want to implement a retention policy to retain and delete SharePoint data say after 5 years. But before the policy is implemented, they want to have a preview of 'what' and 'how much' data is in scope. Is this possible?

A: Currently there is not a simulation mode for policies, we're working on that. The easiest way would be to run an eDiscovery search to determine how much content and where matches the dates for a retention policy or to label all items with a "do nothing" label in the case of auto-labeling.

Q: Will policy lookup only work for adaptive scopes?

A: No, it shows all retention policies or label policies applied to a user/site/group.

Q: Which policy takes precedence, retention label policy or retention policy?

A: Please refer to the principles of retention for more information: <https://docs.microsoft.com/en-us/microsoft-365/compliance/retention?view=o365-worldwide#the-principles-of-retention-or-what-takes-precedence>

Q: Auto-apply policies run once a week, do adaptive scopes service run immediately or periodically?

A: The scope is evaluated daily, and the service job to enforce the retention is the same one as static scopes which can take up to 7 days.

Q: Will this include the Sites for the Groups?

A: Yes, by default all M365 Groups policies include both the mailbox and SPO site, you can change that behavior in the policy via PowerShell as well using the `-Applications` parameter.

Q: It would be good if we could see the last time a timer job ran

A: Thank you for your feedback, we do have plans to make what the service is doing more visible down the road.

Q: Would it be possible to add "Rule syntax" like dynamic membership rules in dynamic groups?

A: This is something we are considering adding within the advanced query configuration UI. Initially our documentation will provide great guidance to get started.

Q: Is there a recommendation to use adaptive policy scopes to apply retention labels over auto-apply policies?

A: You can use them together. Adaptive policy scopes just scope the locations where the label will be published or auto-applied.

Q: So when you specify SharePoint sites in the type of scope this would only account for non-M365 group SharePoint sites, correct?

A: It would apply to all sites that match the query, both group-connected and not. You can use the query and properties in the property bag to exclude them if you wish to do so.

Q: Can we use the existing KQL to build scopes?

A: For SPO sites, yes. It uses mostly the same KQL syntax that you would use for SharePoint Search.

Q: Does it make sense to leave any static retention policies we have for the global firm and apply adaptive scopes for other geos that might be interested in longer retention?

A: Sure, if that is how you'd like to deploy! Just make sure you review the principles of retention documentation to know what behaviors to expect.

Q: Why I am not seeing Disposition Review during the Policy creation?

A: Disposition review is only available for retention labels, not policies.

Q: In an auto-apply policy to apply a label in a SharePoint site we can use criteria found in RefineableString01 for example, in an adaptive scope policy it appears we can be also use RefinableString01 to apply labels to items in a SharePoint site? Is that correct?

A: Almost correct. You could use RefinableString01 to create a scope for the policy, if the exact same property is in the site property bag. You'd then need to also use auto-apply together with the adaptive scopes. Scopes for SPO filter for only sites so no content containing the indexed property will be mapped, only sites.

Q: Can I include private channel SharePoint sites using adaptive scopes?

A: Yes, use the user scope for Teams messages or SPO scope for the site.

Q: Will you be providing any adaptive scope templates as examples for complex scenarios

A: Yes, we plan to provide additional examples and scenarios soon.

Q: Will there be adaptive label scopes in the future (content specific, vs user specific)?

A: You will be able to use adaptive scopes to deploy labels via label policies right away on Oct 18th.

Q: Can we use it as soon as we get it or will we have to wait until Oct 18?

A: You will be able to use soon after you see this feature on your tenant.

Q: Did I miss the timeline availability for public preview/GA?

A: Public preview on October 18th!

Q: So adaptive scopes don't auto-apply retention labels, but they help narrow down what labels are available to apply? Is that correct?

A: *Adaptive scopes can be used with auto-apply labels, they help narrow the scope of where the auto-application will happen.*

Q: Will it be part of the Information Protection and Governance license?

A: Yes.

Q: Does a Compliance Center retention policy on OneDrive sites override the SharePoint Admin center OneDrive Retention policy?

A: *Yes, Compliance policies will override generic lifecycle policies.*

Q: Reg- limitation. Does it mean I can't create a retention policy to retain a SharePoint site forever and include all SharePoint sites? Assuming we have 1000 SharePoint sites? Do we have to create 10 policies? I can't create one user policy to cover all sites?

A: *With static scopes, you can create one policy that will cover all SharePoint sites. But, if you start getting more specific, for example, only apply this policy to 800 sites and not the other 10,000 in my organization, that's when the limits apply.*

Q: If there are 2 conflicting policies, e.g. 1 static policy covers retention for all Teams, then 1 adaptive scope policy that covers Sales Teams. Which policy would take precedence?

A: *We use the <https://docs.microsoft.com/en-us/microsoft-365/compliance/retention?view=o365-worldwide#the-principles-of-retention-or-what-takes-precedence> to decide what policy will apply. Both adaptive and static scopes are the same level of "explicitness".*

Q: Where can we configure "Custom Attributes"? On Azure AD?

A: *You can set these within Exchange Online PowerShell or sync them from On prem using AAD Connect.*

Q: For any policy admin activities will there be audit logs maintained? If yes, will the audit logs retention even if the admin account is disabled.

A: *Yes all policy admin activities are audited. The audit logs are stored at the organization/M365 tenant level and have nothing to do with a user or admin account, so they are safe. You can find them at <https://compliance.microsoft.com>, but your M365 admin needs to grant you access to the audit log.*

Q: Could you use a sites sensitivity classification as scope filter?

A: *Not yet....but we might ;) have an announcement coming at Ignite in November regarding document level sensitivity labels....stay tuned.*

Q: We plan to create static policy to target SPO sites by business groups (e.g. Legal, HR, IT), can that be migrated to adaptive scopes?

A: *Yes, you could possibly use the site name, url or custom refinableStrings to determine department. We recommend starting with adaptive scopes as soon as they are available in your tenant in the next few weeks.*

Q: If an organization has not moved to Yammer native mode and they have a retention for Yammer, I assume that the retention policy would only apply to those in the new Yammer?

A: *Until you change your Yammer network to be in Native mode, no Yammer policy will actually be enforced or apply.*