



23 SEPTEMBER 2026 • TNMOC, BLETCHLEY PARK

GET CONTROL OF YOUR DATA BEFORE MICROSOFT 365 COPILOT DOES

JEROEN BIJDEVIER • PIETER KOPS

AVK Training & Coaching • Crowe IT-Solutions

Archive what you need, remove what you don't, govern what remains

#collabdays

26



COLLABDAYS

What we'll cover

- 01 Why Copilot changes the oversharing conversation
- 02 ROT: usefulness and necessity of what you already have
- 03 SharePoint Advanced Management: inventory, urgency, action
- 04 Records Management in Microsoft Purview
- 05 Bringing it together with File level Archiving

Copilot doesn't change your permissions — it changes what's findable

Same access, new reach — Copilot searches across everything a user already has access to; it doesn't grant new access.

The real problem — Years of oversharing, stale content and unclear ownership become visible the moment something can search across all of it.

Where the fix lives — Not in blocking Copilot — in getting the underlying data estate in order.

COPILOT IS A MIRROR

It surfaces governance debt
that already existed.

Three-part approach for today

01

Clean up what shouldn't be there — ROT

02

Know, and fix, who can see what's left — SharePoint Advanced Management

03

Decide how long things should stay or be visible — Records Management in Purview



ROT

Usefulness and necessity of what you already have.

01



What is ROT?

Redundant — multiple copies of the same content, no single source of truth.

Obsolete — superseded by a newer version, or no longer applicable.

Trivial — no business, legal or historical value — personal files, duplicate downloads, scratch notes.

DIGITAL POLLUTION

It accumulates silently, grows every day, and enlarges the surface Copilot can retrieve from.

Turning ROT into action

Redundant — consolidate to one authoritative location; retire the duplicates.

Obsolete — move to an archive location or apply a retention label; stop it being actively indexed.

Trivial — give people simple personal-storage guidance — a behavioral fix, not an IT project.

NOTHING DELETED BLIND

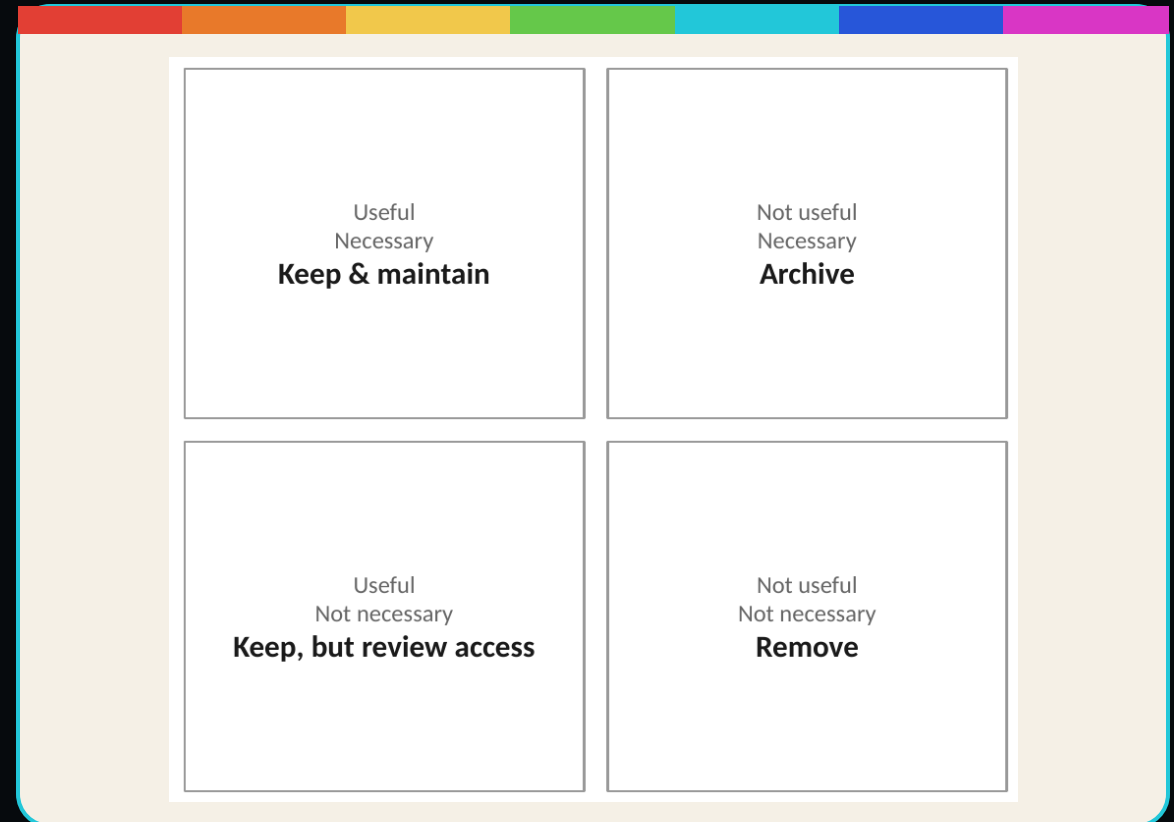
None of this requires deleting
anything you're unsure about.
That's deliberate.

For every piece of content, ask two questions

USEFULNESS AND NECESSITY

1. **Usefulness** — — is it actually still used by anyone?
2. **Necessity** — — must it be kept for a legal, regulatory, contractual or business reason?

If the answer to both is no, it's a candidate for archiving or removal. And every item needs an accountable owner — without one, nobody ever answers these questions.





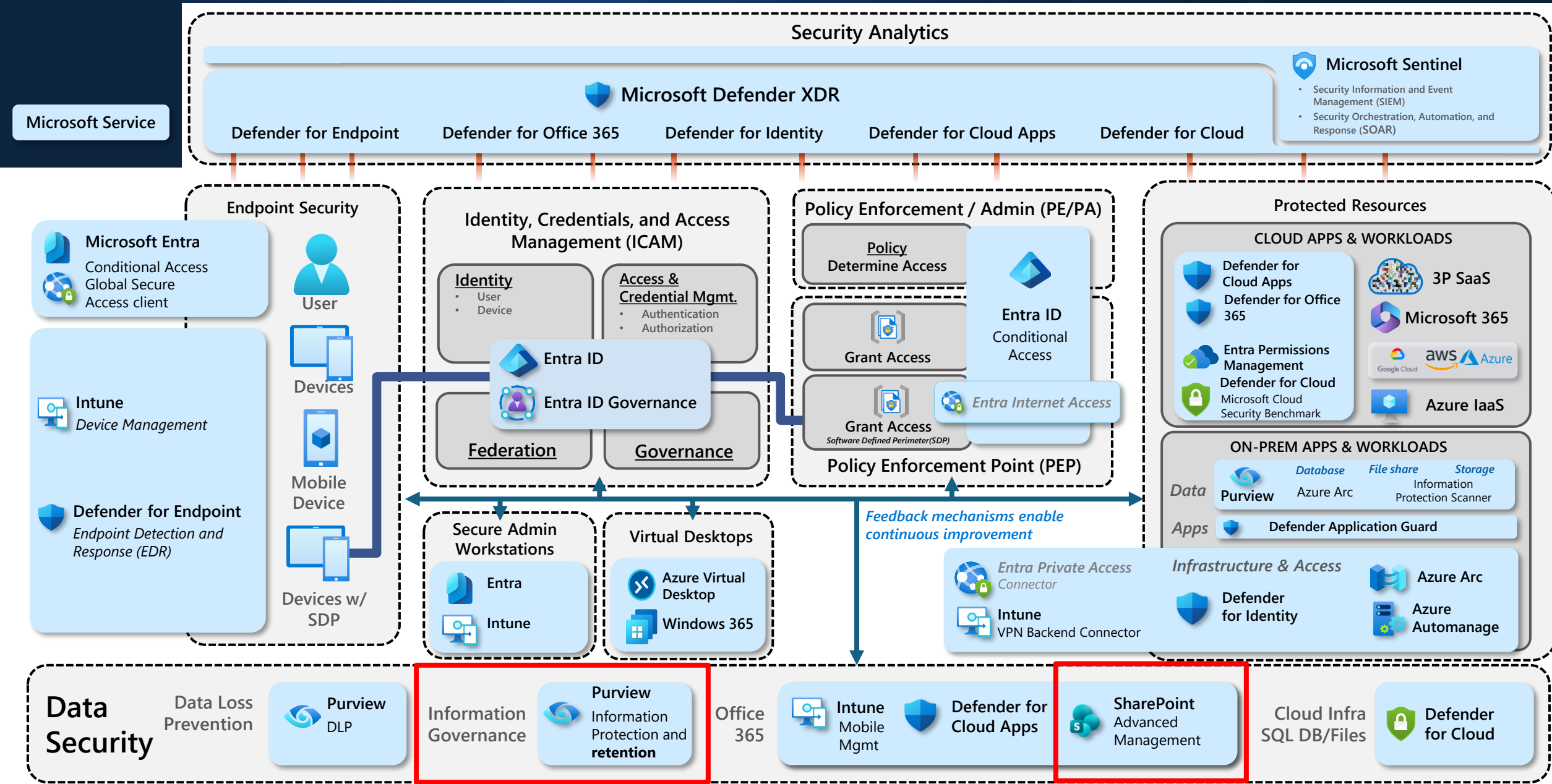
“

AI DEPENDS ON GOOD DATA.

Governing your data well



Microsoft Tools Mapping



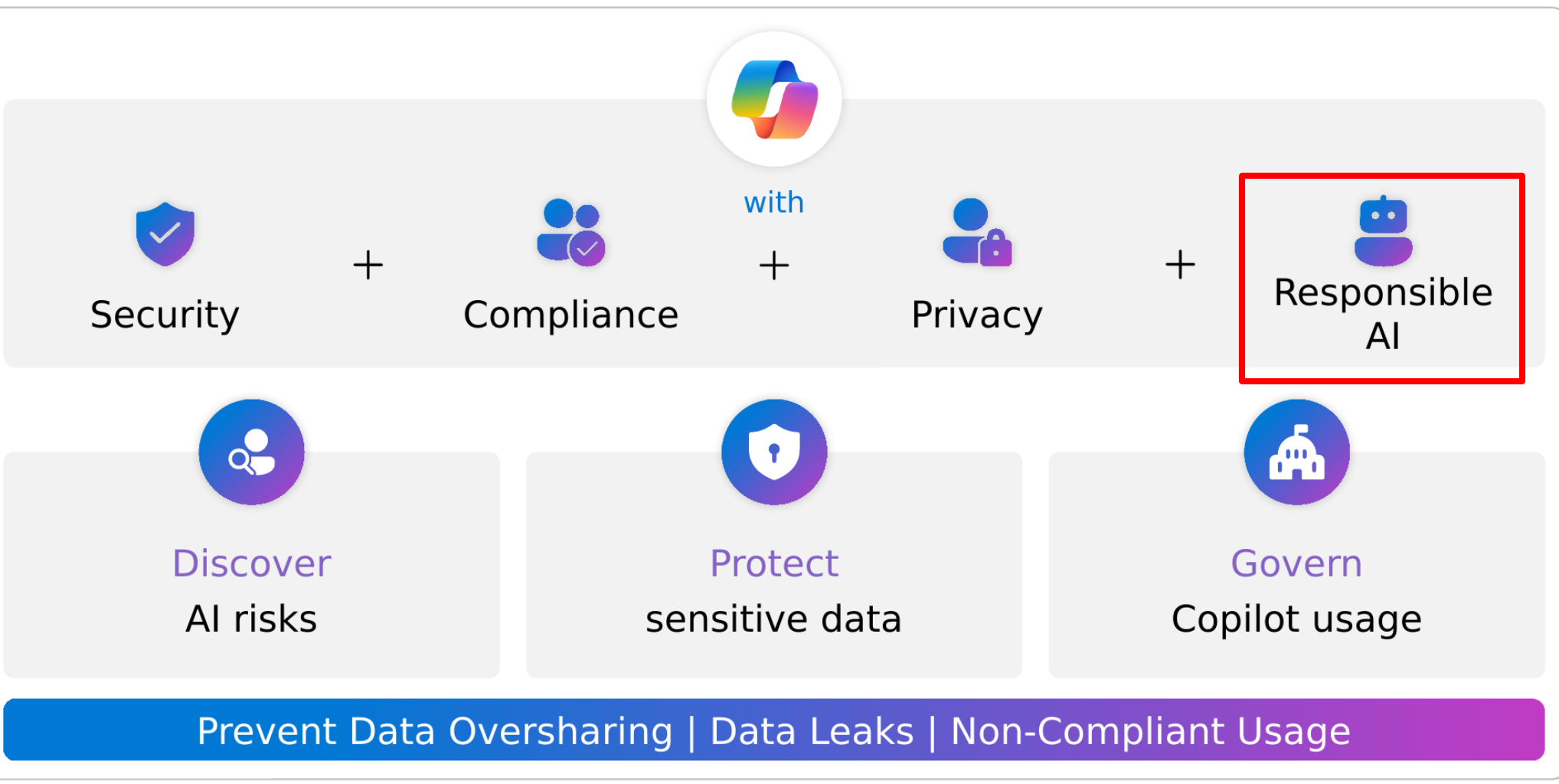


COPILOT CONTROL SYSTEM

The framework Microsoft gives you to govern Copilot.

02





1

Over-permissioning

too much internal access

Bias towards overly broad access for permissions and links

Implications

Risk of exposure in search and AI tools

2

Under-enforcement

too few internal controls

Content looks the same without labeling and content-aware policies to follow its use

Hard to get started with AI and solve without the right tools

Links to CCS resources

aka.ms/copilot/oversharing
aka.ms/copilotcontrolssystemddd
aka.ms/copilotcontrolssystemddd/s3
aka.ms/oversharingMechanics
aka.ms/m365copilotwithpurview

aka.ms/copilotacedemie
aka.ms/DSPMforAI/deploy
aka.ms/DSPMforAI/oversharing
aka.ms/PurviewDeploymentModels



“

CONTENT NEEDS TO BE MANAGED.

Knowing what exists and who can reach it. Plan, do, check, act.





SharePoint Advanced Management

Provides SharePoint site management and content governance capabilities



Microsoft Purview

Provides security, compliance, and governance across data and files



Roles

- **AI Administrator**
- **SharePoint Advanced Management Administrator**
- **Compliance Administrator**
- **Disposition Management**

- **Optional: Content view and list**

Licenses



Microsoft 365 Copilot

You own at least 1 subscription for this product. [Manage subscription details](#)



Microsoft 365 E5 EEA (no Teams)

You own at least 1 subscription for this product. [Manage subscription details](#)

Business Premium + Purview suite



Permission required



You must be a member of the following role groups to use content explorer:

- Content Explorer List Viewer. This role group allows you to view the list of locations and list of items in those locations.
- Content Explorer Content Viewer. This role group allows you to view the source content for each item.

These permissions are assigned in the Microsoft Purview portal. Contact your global admin for assistance.

[Learn more](#)[Close](#)



Reduce content sprawl

Identify patterns and potential issues with reporting and receive actionable recommendations

Run automated, rule-based policies to manage and retire inactive sites and their content

Create and leverage AI-powered policies and reports to govern content at scale



Control content oversharing

View reports that identify sites that contain potentially overshared or sensitive content

Enforce stringent access conditions when users access SharePoint sites with access policies

Prevent sites and content from being discovered with restricted content discovery control



Manage site lifecycle

Review and monitor changes you've made to a SharePoint site's properties

Use broad reports to review changes to SharePoint site properties

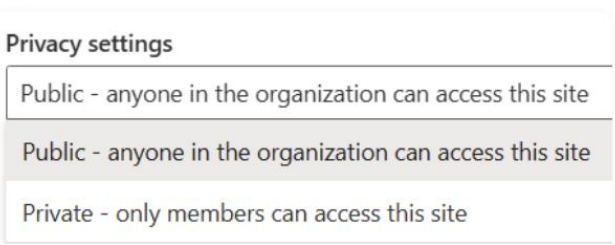
Leverage policies to ensure proper content ownership and manage unused content across the organization



Restrict content from Microsoft 365 Copilot the kill switch







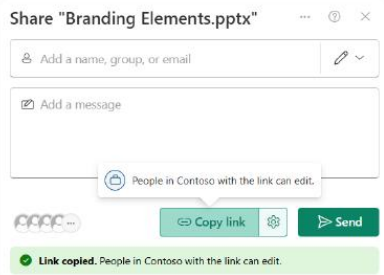
Privacy settings

Public - anyone in the organization can access this site

Public - anyone in the organization can access this site

Private - only members can access this site

Site privacy set to public



Share "Branding Elements.pptx"

Add a name, group, or email

Add a message

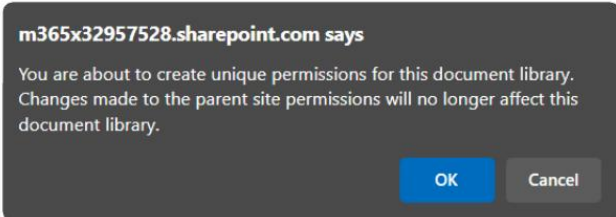
People in Contoso with the link can edit.

Copy link

Send

Link copied. People in Contoso with the link can edit.

Default sharing option is everyone

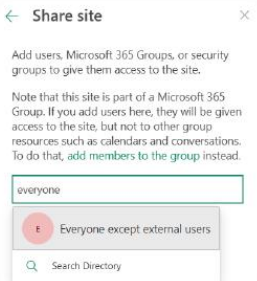


m365x32957528.sharepoint.com says

You are about to create unique permissions for this document library. Changes made to the parent site permissions will no longer affect this document library.

OK Cancel

Broken permission inheritance



Share site

Add users, Microsoft 365 Groups, or security groups to give them access to the site.

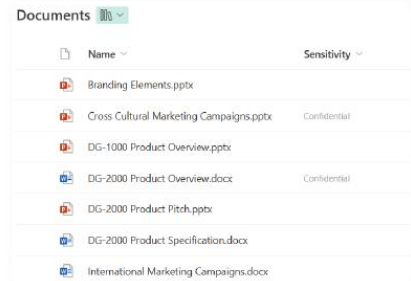
Note that this site is part of a Microsoft 365 Group. If you add users here, they will be given access to the site, but not to other group resources such as calendars and conversations. To do that, add members to the group instead.

everyone

Everyone except external users

Search Directory

Use of "everyone except external users" domain group

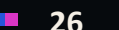


Documents

Name	Sensitivity
Branding Elements.pptx	
Cross Cultural Marketing Campaigns.pptx	Confidential
DG-1000 Product Overview.pptx	
DG-2000 Product Overview.docx	Confidential
DG-2000 Product Pitch.pptx	
DG-2000 Product Specification.docx	
International Marketing Campaigns.docx	

Sites and files without sensitivity labels

Common causes of oversharing





Home > Advanced management

Dark mode Subscription status: Active

Advanced management

Easily manage your content with policies, reports, and settings that simplify your workflow, strengthen security, and help your organization work better together.

[Learn more about SharePoint Advanced Management](#)

Overview All features

Prepare for Copilot with SharePoint Advanced Management

Advanced management tools help reduce oversharing and content sprawl, enhance response quality, and control Copilot content access.

[Start assessment](#)

Improve Copilot results across your Microsoft 365 apps

SharePoint	OneDrive	Viva Engage
Microsoft Teams	Power BI	





SharePoint Advanced Management and Purview DSPM Demo

Tool to help reduce oversharing and content sprawl and control Copilot content access.

04





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Active sites

Archived sites

Deleted sites

SharePoint Embedded

Backup

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Migration

Reports

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App insights

Catalog management

Change history

Content services

Data access governance

OneDrive accounts

Site policy comparison

Advanced

More features

Advanced management

Customize navigation

Show all

Advanced management

Easily manage your content with policies, reports, and settings that simplify your workflow, strengthen security, and help your organization work better together.

Learn more about SharePoint Advanced Management

Overview All features

Prepare for Copilot with SharePoint Advanced Management

Advanced management tools help reduce oversharing and content sprawl, enhance Copilot content access.

Restart assessment

Improve Copilot results across your Microsoft 365 apps

SharePoint

Microsoft Teams

OneDrive

Power BI

Viva Engage

Content management assessment

Your results are ready. Explore the findings and take action today.

Site lifecycle

9 sites require attention

Last updated on August 21, 2026

11% of sites

Issue type	Number of issues	Recommendations
Site inactivity	9	View recommendations
Missing site ownership	0	View recommendations

Oversharing

9 sites require attention

Last updated on August 12, 2026

11% of sites

Issue type	Number of issues	Recommendations
Broken permission inheritance	7	View recommendations
Org-wide site permissions	2	View recommendations
Organization and anyone sharing links	0	View recommendations



Content management assessment

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Org-wide site permissions	2	View recommendations
Organization and anyone sharing links	0	View recommendations





Site inactivity
Inactive site policy

This report detects sites that haven't been used for a specified period.
[Learn more about managing inactive sites](#)

Issues found
9

Recommendations

- [Download a report](#) containing a list of inactive sites and sites that don't have owners.
- Go to the [Inactive site policy page](#) to create an inactive site policy and notify owners or take action.

Why do these sites require attention?

Inactive sites can become security risks if they're not regularly monitored or maintained.

How we got this number

The number of inactive sites includes classic sites, communication sites, Microsoft 365 group-connected sites, Teams-connected sites, and non group-connected team sites that have been inactive for at least three months.

Inactive site policy features

- Identify inactive sites.
- Send notifications to site owners or site admins.
- Automatically archive or mark sites as read-only.

Content management assessment

✔ Your results are ready. Explore the findings and take action today.

Site lifecycle

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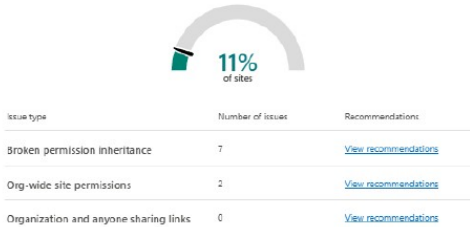
Last updated on August 21, 2024



Oversharing

9 sites require attention

Last updated on August 12, 2024



Broken permission inheritance

Site permissions across your tenant

This report identifies sites with a high number of users across all permission scopes (inherited and broken).

[Learn more about data access governance reports](#)

Issues found
17

Recommendations

- [Download a report](#) containing a list of sites that have items with unique permissions, are shared org-wide, or have *people in your organization or anyone* sharing links.
- Go to the [Site permissions across your tenant](#) page to take action:
 - Initiate site access reviews.
 - Restrict site access to specific groups or users.
- Learn about [restricting content from being found by search and Copilot](#).

Why do these sites require attention?

When a user modifies the permissions of a file stored on a site, it breaks the file's inheritance from the site's permissions. As a result, any future changes to site permissions will no longer propagate to that file, leading to discrepancies between site-level and file-level access. This can lead to oversharing.

How we got this number

Count of all items where inheritance was broken and unique permissions were assigned.

Site permissions across your tenant report features

- Lists sites that contain broken inheritance.
- Lists files that contain broken inheritance visible only to site owners.





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Reports All review requests

Deep dive sites

Get started
We recommend starting with a snapshot report to get a quick overview of permissions for all sites in your organization.

Snapshot reports ⓘ

Site permissions across your organization RECOMMENDED

Check for broad permissions such as Everyone except external users, guest access, sharing links, and unique permissions across all sites in your organization, as of the report generation date.

View reports

Sites and files shared via special SharePoint groups NEW

Identify all sites, folders and files, across SharePoint and OneDrive, which are effectively public due to special SharePoint groups such as Everyone and/or Everyone except external users, as of the report generation date.

View reports

Activity reports ⓘ

Sharing links

Report available for generation

Identify potential oversharing by monitoring sites where users created new sharing links in SharePoint sites in the last 28 days.

View reports

Site permissions for users

Identify all sites a user can access and determine whether they can access the entire site or specific sections, granted directly to the user or indirectly through groups as of the report date.

View reports

Sensitivity labels applied to files

Monitor sensitive content by reviewing the sites where sensitive files are stored and the policies applied to these sites, as of the report generation date.

View reports

Shared with 'Everyone except external users'

Report available for generation

Make sure files, folders, and lists aren't being overshared by reviewing sites that have the most items shared with "Everyone except external users" in the last 28 days.

View reports



Data access governance > Site permissions across your organization > SharePoint report

SharePoint report

This page lists the top 100 sites with the highest number of unique users who have access to the sites and their content. You can download a .csv report for up to 1 million sites.

Download detailed report

+ Initiate site access review

View all reviews

Restrict site access

Showing 18 of 18

Search sites

Filters: Site sensitivity: All External sharing: All Privacy: All

☐	Name	URL	Site access review status	Files	Items with unique pe...	Total permissione...	Guest user permissio...	External participants	Entra groups	Count of 'People in y...	Count of 'Anyone' il...	EEUU permission cou...	Everyone permission...	Primary ad
☐	HR	.../sites/COL_HR	-	43	4	3	0	0	0	1	0	0	0	Pieter Kops
☐	Marketing	.../sites/col_Marketing	-	36	0	2	0	0	0	0	0	0	0	Pieter Kops
☐	Marketing	.../sites/Marketing2	-	9	3	2	0	0	3	1	0	0	0	Marketing
☐	Purview-Retention	.../sites/Purview-Retention	-	10	0	2	0	0	0	0	0	0	0	Jeroen Bijd
☐	Get control of your ...	.../sites/Getcontrolofyou...	-	4	0	2	0	0	3	0	0	0	0	Get contro

Data access governance > Site permissions across your organization > SharePoint report

Microsoft 365

SharePoint report

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Download detailed report

+ Initiate site access review View all reviews Restrict site access

☐	Name	URL	Site access review status	Files	Items with unic
☒	Purview-Retention	.../sites/Purview-Retention	-	10	0
☐	Get control of yo			4	0
☐	App Builder - Qu			2	1

Send emails to site owners

Your SharePoint administrator has asked you to review permissions for your site

Review the users or groups that have access to your site, and remove any users or groups that are no longer needed

SharePoint admin comments:

"Please check"

Site Name	Authorized users	Links for everyone	For People in Organizations links
 Purview-Retention Connected to Teams	2	0	0

View all delegated content

This email is generated from an unmonitored alias. Don't answer.

Microsoft

[Privacy Statement](#)

This email is generated by ON6PH's use of Microsoft 365 and may contain content controlled by ON6PH.

SharePoint Advanced Management

Microsoft 365

Your SharePoint administrator has asked you to review permissions for your site

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SharePoint admin comments:

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Site Name	Authorized users	Links for everyone	For People in Organizations links
 Purview-Retention Connected to Teams	2	0	0

[View all delegated content](#)

This email is generated from an unmonitored alias. Don't answer.

Microsoft

[Privacy Statement](#)

This email is generated by ON6PH's use of Microsoft 365 and may contain content com

**Purview-Retention**[Home](#)[Documents](#)[Pages](#)[Site contents](#)[Edit navigation](#)[★ Added to favorites](#)[🔗 Site access](#)[Site Reviews](#) > **Permissions to many users**

The list below details scopes which have the highest number of permissioned users. It also highlights possible sources such as count of sharing links and presence of groups such as Everyone and Everyone Except External Users (EEEU). Remove permissions where they are no longer required to prevent oversharing.

	Name	Scope	Number of Permissioned users	Number of groups	Number of 'Anyone' links	Number of 'People in your org' links	Has EEEU	Has Everyone	Action
	Document	File	2	3	-	-	Yes	-	 Manage access
	Purview-Retention	SharePoint site	2	3	-	-	-	-	 Manage access

Broken permission inheritance



The image shows a comparison between a SharePoint report and its configuration settings. On the left is a 'SharePoint report' showing a table of sites. On the right is the 'Restricted site access' configuration page. A red box highlights the 'Restrict SharePoint site access to only users in specified groups' checkbox in both views. A blue box labeled 'Kill switch' has an arrow pointing to this checkbox. Another arrow points from the checkbox in the report view to the checkbox in the configuration view.

SharePoint report

This page lists the top 100 sites with the highest number of unique users who have access to the sites and their content. You can download a .csv report for up to 1 million sites.

[Download detailed report](#)

[+ Initiate site access review](#) [View all reviews](#) [Restrict site access](#)

☐	Name	URL	Site access review status	Files	Items with unique pe...	Total permissione... ↓	Guest user permisso...	Ext...
☐	Marketing	../sites/col_Marketing	-	36	0	2	0	0
☐	Marketing	../sites/Marketing2	-	9	3	2	0	0
☒	Purview-Retention	../sites/Purview-Retention	Generating	10	0	2	0	0

Restricted site access

Use this setting to allow only users in specific groups to access this SharePoint site. You can add up to 10 security groups or Microsoft 365 groups. Users not in these groups will lose access to this SharePoint site.

[Learn more about Restricted Access Control for SharePoint sites](#)

☐ Restrict SharePoint site access to only users in specified groups

Restricted site access

Use this setting to allow only users in specific groups to access this SharePoint site. You can add up to 10 security groups or Microsoft 365 groups. Users not in these groups will lose access to this SharePoint site.

[Learn more about Restricted Access Control for SharePoint sites](#)

☒ Restrict SharePoint site access to only users in specified groups

Add group

Search groups

Name (1) ↑

- Get control of your data
Getcontrolofyourdata@on6ph.be





EXCLUDE COPILOT — RESTRICTED ACCESS

SharePoint admin center

Copilot

?

Jeroen Bijdevier

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and accidental deleti

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Oversha

Create

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Site name

Purview-Records

Purview-Retention

P

Purview-Records

Communication site

View site

Delete

General

Activity

Membership

Settings

External file sharing

Only people in your organization

More sharing settings

Sensitivity label

None

Restrict content discovery

On

Off

Custom scripts

Blocked

Edit

Restricted site access

Not set

Edit

Version history limit

Same as organization-level (Automatic)

Exclude copilot

Only people in this group have access





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Site lifecycle management

Use this page to create and manage policies that automate tasks across the lifecycle of your sites.
[Learn more about managing the lifecycle of your sites](#)

Inactive site policies
Number of policies: 1

Create and configure policies to:

- Identify inactive sites
- Send notifications to site owners or admins
- Automatically archive or mark sites in read-only

Open

Site ownership policies
Number of policies: 1

Create and configure policies to:

- Identify sites that don't meet organization's ownership criteria
- Send notifications to find new site owners or admins
- Automatically mark sites in read-only

Open

Site attestation policies
Number of policies: 0

Create and configure policies to:

- Identify sites due for attestation of their information
- Send notifications to site owners or admins seeking attestation
- Automatically archive or mark sites in read-only

Open

COLLABDAYS

26

42

#collabdays



Microsoft Purview

Search for solutions, users, articles, and more

Copilot

Jeroen Bijdevier

Home

Solutions

Agents

Learn

Usage center

Settings

Records Management

DSPM

Data Lifecycle Management

DSPM

Posture

Objectives

AI observability

Discover

Apps and agents

Activity explorer

Asset explorer

Data risk assessments

Tasks and actions

Reports

Data risk assessments > Jeroens Assessment 1 - duplicate

Jeroens Assessment 1 - duplicate

Assessment details

Status: Completed

Frequency: Weekly

Completed on: Sep 7, 2026

Total items

1,935 Scanned for sensitive info types

1935

Scanned For Sensitive Info Types

Not Scanned

Sensitivity labels on data

Labeled: 0

Not labeled

No Sensitive Information Types Detected

Sensitive Information

Data Not Scanned

Sharing links accessed by anonymous or external users (last 30 days)

No data available

Activity

Amount

Sensitivity

Shared with

Data risk assessment results

Review results to identify potential oversharing risks in your organization and apply fixes, such as limiting access to sensitive data and evaluating access to SharePoint sites.

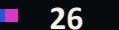
Export

22 items

Group

Customize columns

Site name	Source type	Sensitivity label	Total items	Total items accessed	Times users accessed items	Unique users accessing items	Total sensitive items	Unique sensitive information types	Total scanned items	Total unscanned data	Items shared with
AeroWeave	SharePoint	None	56	15	69	1	0	0	56	0	People in your organization
Project-Phoenix	SharePoint	None	1,592	16	38	1	1,201	5	1,592	0	Anyone
Drone workshop	SharePoint	None	26	10	24	1	1	3	26	0	Anyone, specific people
HR	SharePoint	None	49	9	14	1	21	11	49	0	Anyone, specific people
Marketing	SharePoint / Standard	None	13	1	7	1	4	4	13	0	Anyone, specific people
Sales	SharePoint	None	1	1	6	1	0	0	1	0	None
Communicatie	SharePoint	None	20	3	6	1	0	0	20	0	Specific people
Purview-Retention	SharePoint	None	16	1	4	1	0	0	16	0	People in your organization, specific pe...





RECORDS MANAGEMENT IN PURVIEW

Access is under control. Now: how long should any of this live?

03



Data Lifecycle Management vs. Records Management

Data Lifecycle Management — broad, largely automated retention and deletion across mailboxes, sites and Teams.

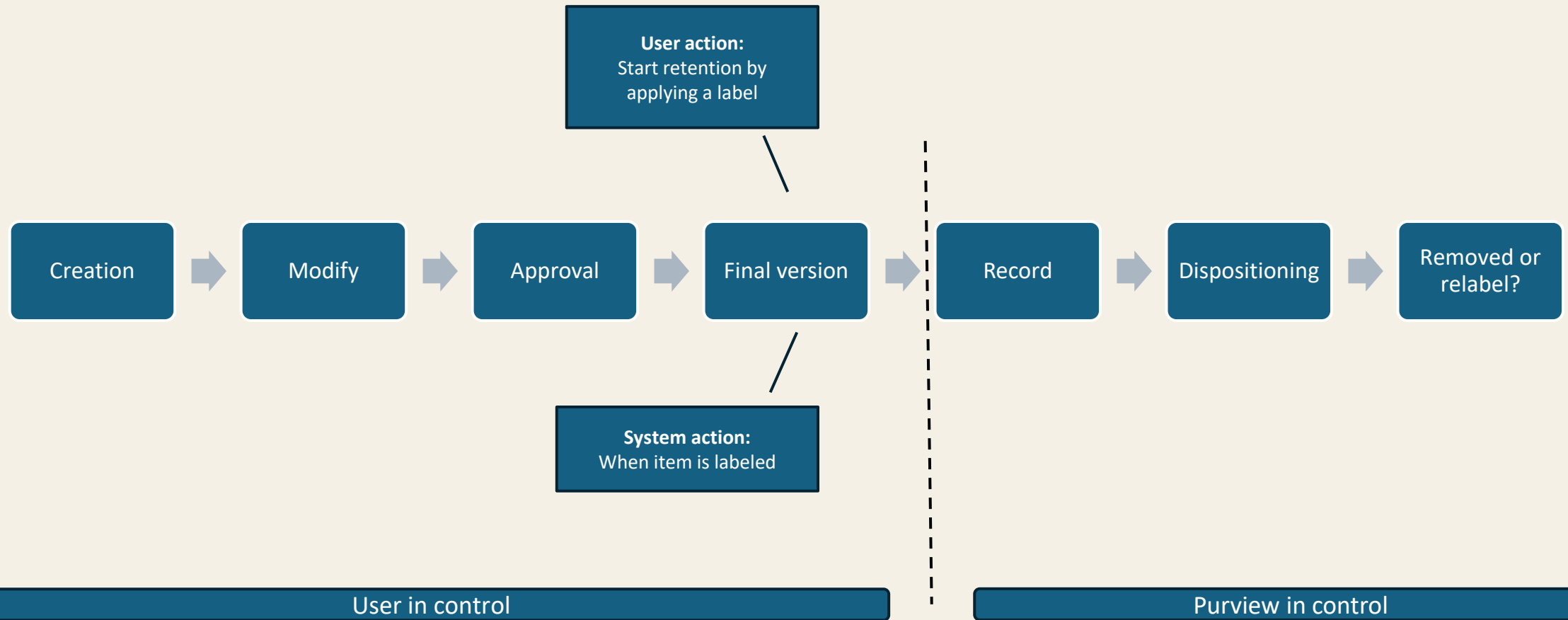
Records Management — adds formal recordkeeping: a file plan, regulatory records, manual disposition review with an audit trail.

Real overlap — the two are not mutually exclusive, and most organizations run both.

WHEN IT MUST BE PROVABLE

Use Records Management where there's a legal, regulatory or business reason to prove how something was disposed of.

Document life cycle





RECORDS MANAGER BASED ON SHAREPOINT METADATA

PR

Purview-Records

Home Documents Pages Site contents Edit navigation

★ Following

👤 Site access

Documents

Copilot

to OneDrive

Forms

Classify and extract

Edit in grid view

Create or upload

Details

All Documents

Add view

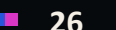
Name	Retention-Time	Retention label	Retention label Applied	Label applied by
AeroLedger Consulting - Airline Cost Reduction Assessment.docx	1 day record	Record 1 day	8/18/2026 7:49 PM	System Account
AeroNova Leasing - Fleet Renewal Proposal 2026.docx	1 day record	Record 1 day	8/18/2026 7:49 PM	System Account
AeroVantage Sales - Aircraft Remarketing Teaser.docx	1 day record	Record 1 day	8/18/2026 7:49 PM	System Account
Altair Regional Airlines - Board Briefing Network Expansion.docx	1 day record	Record 1 day	8/18/2026 7:49 PM	System Account
Asteria Aerospace - Supplier Performance Review.docx	1 day record	Record 1 day	8/18/2026 7:49 PM	System Account
AtlasAirTech - Avionics Upgrade Project Charter.docx	1 year record	Record 1 year	8/18/2026 7:49 PM	System Account
AviaPulse Analytics - Passenger Demand Forecast.docx	1 year record	Record 1 year	8/18/2026 7:49 PM	System Account
BlueWing Aerotech - Engine Parts Procurement Plan.docx	1 year record	Record 1 year	8/18/2026 7:49 PM	System Account
CloudNine Catering - Inflight Retail Performance Report.docx	1 year record	Record 1 year	8/18/2026 7:49 PM	System Account
Cobalt Airways - Fuel Hedging Committee Note.docx	1 year record	Record 1 year	8/18/2026 7:49 PM	System Account

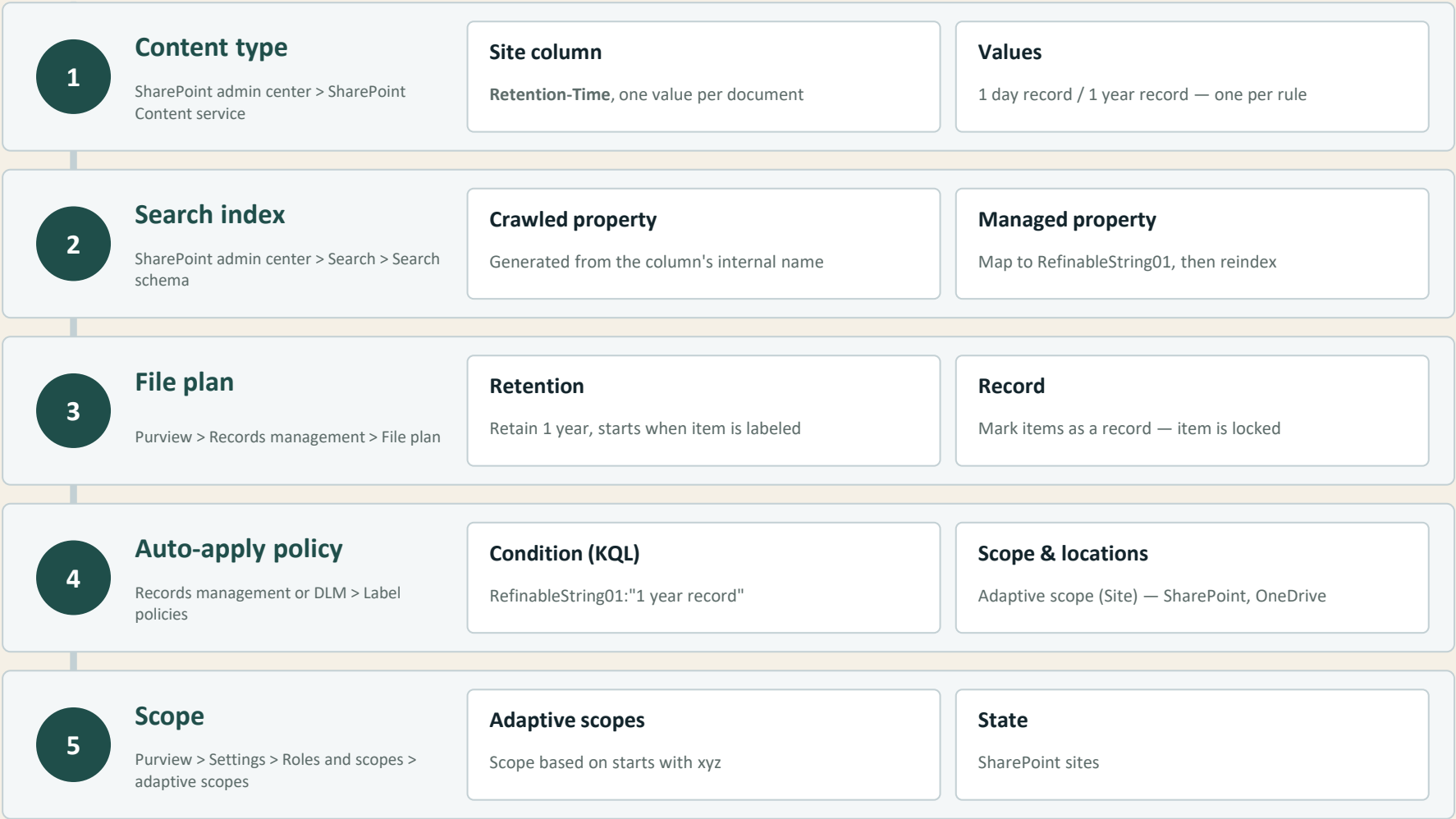
Item is a record

Metadata

Record label

Auto labeling







RECORDS MANAGER DEMO

Records management driven by SharePoint metadata.

04





SharePoint admin center

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Dark mode

Home

Sites

Active sites

Archived sites

Deleted sites

SharePoint Embedded

Backup

Policies

Settings

Content services

Term store

Content type gallery

Migration

Reports

Advanced

More features

Content type gallery

Associate a set of columns with specific types of content.
[Learn more about content types](#)

+ Create content type

pur

All Items

Site content type	Parent	Category	Last published
Retention-Document	Document	Purview	Jul 25 2026 2:02:18 PM





SharePoint admin center

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Home

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Advanced

More features

Advanced management PRO

Customize navigation

Show all

Content type gallery > Retention-Document

Edit Publish Settings Delete content type

Retention-Document

Category

Purview

Parent

Document

Content Type ID

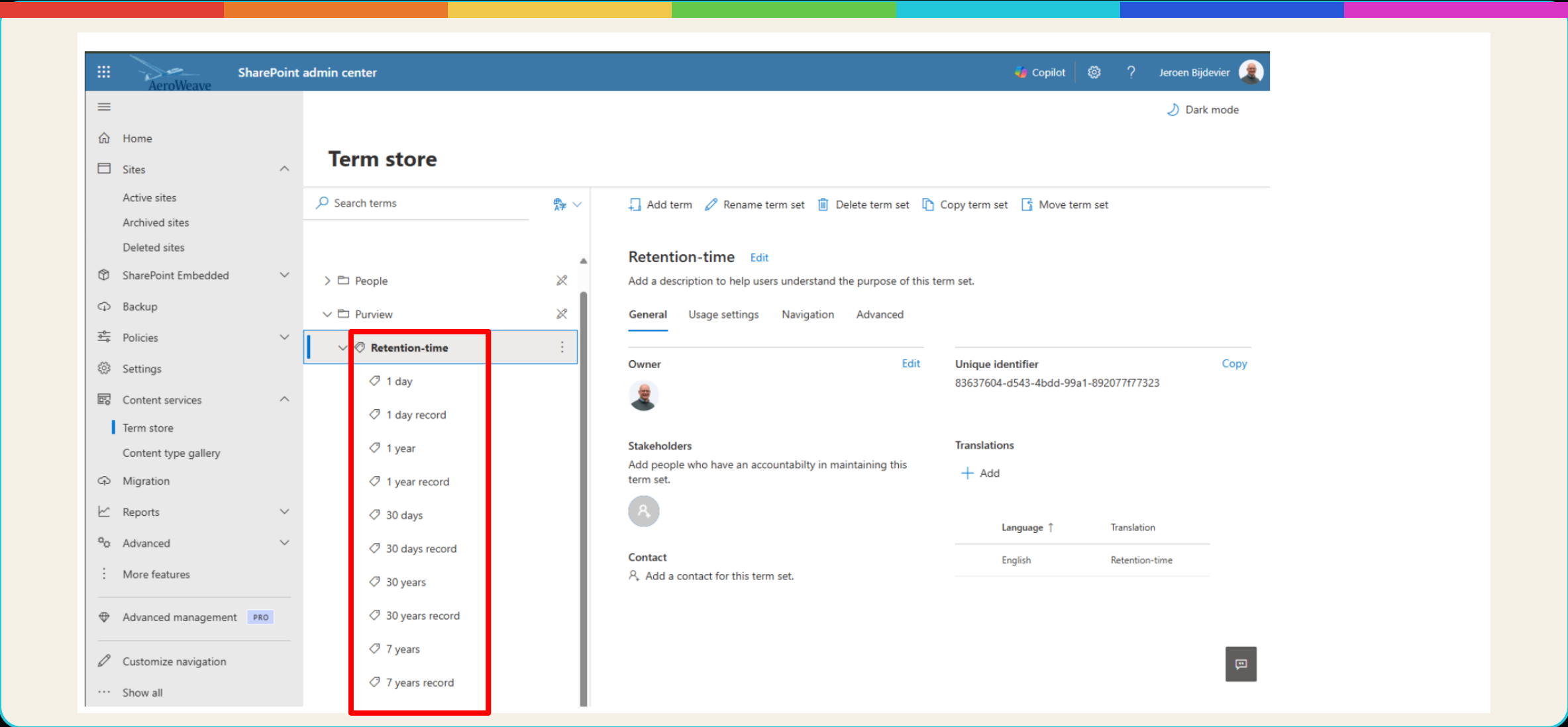
0x0101002D0478C0797D6F40B4E29EE8B6EF7E2E

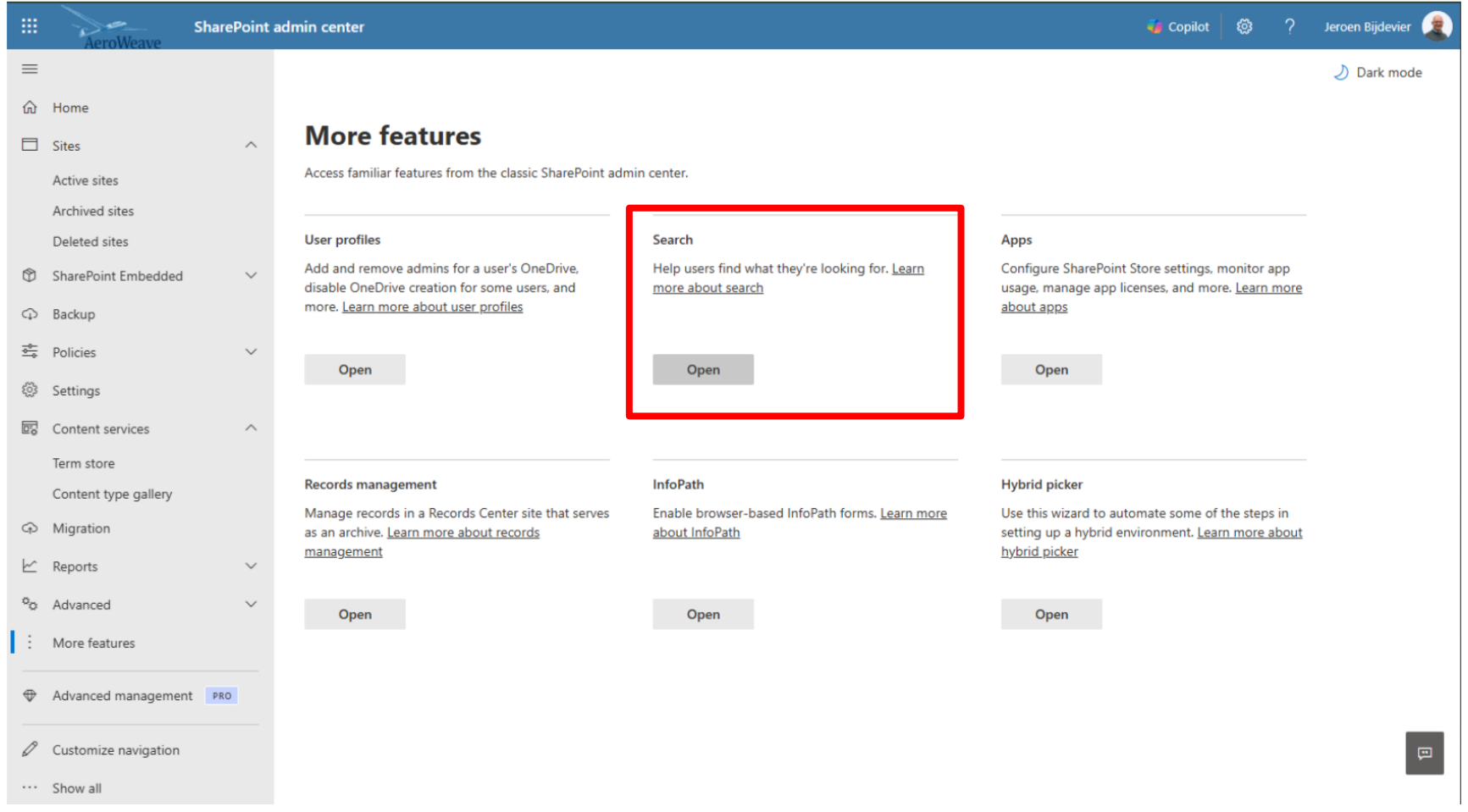
Site columns

Add and manage the site columns that are a part of this content type.

Add site column

Name	Type	Required	Source
Name	File	Yes	Document
Title	Single line of text	No	Item
Retention-Time	Managed Metadata	No	Retention-Document







Search

Managed Properties | Crawled Properties | Categories

Use this page to view, create, or modify the settings of this managed property. Note that the settings that you can adjust depend on your current authorization level.

Name and description

Name and optional description for this property.

Property name:

RefinableString01

Description:

Type

Type of information that is stored in this property.

The type of information in this property:

- ☒ Text
- ☐ Integer
- ☐ Decimal
- ☐ Date and Time
- ☐ Yes/No
- ☐ Double precision float
- ☐ Binary

Mappings to crawled properties

The list shows all the crawled properties that are mapped to this managed property. A managed property can get its content from one or more crawled properties.

☒ Include content from all crawled properties

☐ Include content from the first crawled property that is not empty, based on the specified order

ows_Retention-Time

Move Up

Move Down

Add a Mapping

Remove Mapping

OK



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Home

Solutions

Agents

Learn

Usage center

Settings

Records Management

DSPM

Data Lifecycle Management

Records Management

Overview

File plan

Policies

Events

Disposition

Classifiers

Explorers

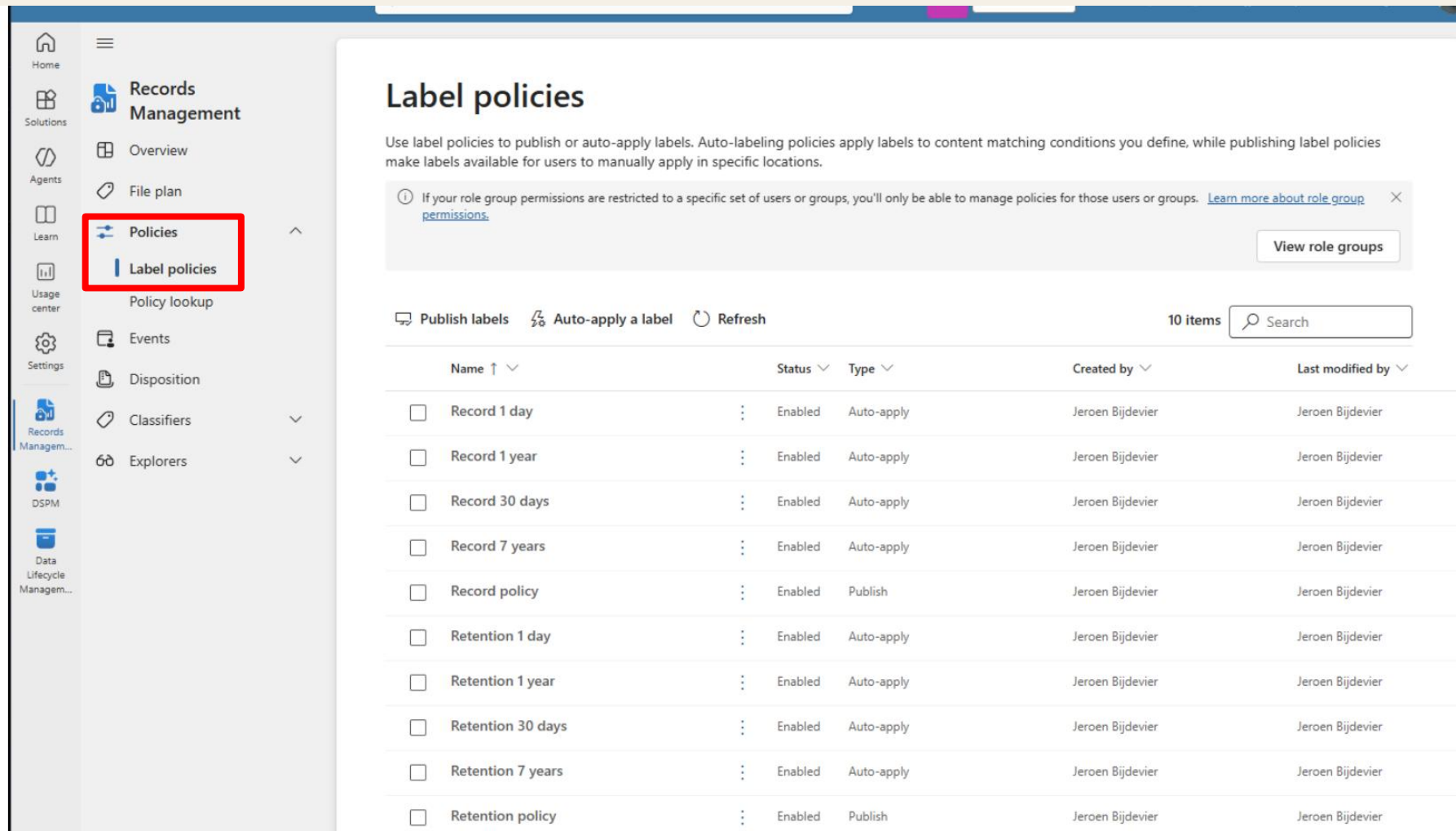
File plan

Take advantage of a more flexible and comprehensive way to manage your business-critical data. Our file plan lets you apply item-level retention settings, import or export templates of your content management plan, define whatever label settings meet your needs, review detailed label analytics, and more. [Learn about using a file plan](#)

5 of 9 selected

Search

☐	Name ↑ ▼	Status ▼	Based on ▼	Is re... ▼	Is re... ▼	Is un... ▼	Rela... ▼	Retention duration ▼	Disposition ty...
☒	Record 1 day	Active	Label applied	Yes	No	No		Retain labeled item for 1 day	Review required
☒	Record 1 year	Active	Label applied	Yes	No	No		Retain labeled item for 1 ye...	Review required
☒	Record 14 days and mov...	Inactive	Label applied	No	No	No		Retain labeled item for 14 ...	Review required
☒	Record 30 days	Active	Label applied	Yes	No	No		Retain labeled item for 29 ...	Review required
☒	Record 7 years	Active	Label applied	Yes	No	No		Retain labeled item for 7 ye...	Review required
☐	Retention 1 day	Active	Label applied	No	No	No		Retain labeled item for 1 day	Review required
☐	Retention 1 year	Active	Label applied	No	No	No		Retain labeled item for 1 ye...	Review required
☐	Retention 30 days	Active	Label applied	No	No	No		Retain labeled item for 29 ...	Review required
☐	Retention 7 years	Active	Label applied	No	No	No		Retain labeled item for 7 ye...	Review required



Label policies

Use label policies to publish or auto-apply labels. Auto-labeling policies apply labels to content matching conditions you define, while publishing label policies make labels available for users to manually apply in specific locations.

Info: If your role group permissions are restricted to a specific set of users or groups, you'll only be able to manage policies for those users or groups. [Learn more about role group permissions.](#) [View role groups](#)

Actions: [Publish labels](#) [Auto-apply a label](#) [Refresh](#) 10 items

	Name ↑ ↓	Status ↓	Type ↓	Created by ↓	Last modified by ↓
☐	Record 1 day	Enabled	Auto-apply	Jeroen Bijdevier	Jeroen Bijdevier
☐	Record 1 year	Enabled	Auto-apply	Jeroen Bijdevier	Jeroen Bijdevier
☐	Record 30 days	Enabled	Auto-apply	Jeroen Bijdevier	Jeroen Bijdevier
☐	Record 7 years	Enabled	Auto-apply	Jeroen Bijdevier	Jeroen Bijdevier
☐	Record policy	Enabled	Publish	Jeroen Bijdevier	Jeroen Bijdevier
☐	Retention 1 day	Enabled	Auto-apply	Jeroen Bijdevier	Jeroen Bijdevier
☐	Retention 1 year	Enabled	Auto-apply	Jeroen Bijdevier	Jeroen Bijdevier
☐	Retention 30 days	Enabled	Auto-apply	Jeroen Bijdevier	Jeroen Bijdevier
☐	Retention 7 years	Enabled	Auto-apply	Jeroen Bijdevier	Jeroen Bijdevier
☐	Retention policy	Enabled	Publish	Jeroen Bijdevier	Jeroen Bijdevier



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Copilot

1

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Auto-labeling > Create auto-labeling policy

Name

Info to label

Administrative Units

Scope

Adaptive scope

Label

Mode

Finish

Choose adaptive policy scopes and locations

After adding one or more adaptive policy scopes, we'll show you the Microsoft 365 locations that are supported by the policy. You can then decide which of those locations to apply the policy to.

You can set up data connectors to import content from non-Microsoft apps like Slack, WhatsApp and many more, for use with this solution.

Action required to create AI-related policies. To create policies that include certain generative AI apps, your org needs either pay-as-you-go or an Agent 365 subscription (requirements vary). This doesn't apply to retaining interactions in Microsoft 365 Copilot and Microsoft Copilot.

+ Add scopes

Add scopes to see them here

Choose locations to apply the policy

Based on the scopes you added, this policy can be applied to content in these locations.

Status	Location	Applicable Content
☐ Off	Exchange mailboxes	Items in matching user, shared, and resource mailboxes with an end date, notes, and tasks with a matching user. More details
☐ Off	SharePoint sites	All matching SharePoint sites, Team sites, and OneDrive sites. More details
☐ Off	OneDrive accounts	All files in matching users' OneDrive accounts.
☐ Off	Microsoft 365 Group mailboxes & sites	Items in the Microsoft 365 Group mailbox, group-connected SharePoint team site, classic or communication sites or SharePoint sites.

Back

Next

Choose adaptive policy scopes

Each scope shows how many users, groups, and sites currently match the attributes defined in that scope.

Search for scope

1 selected

☒	Name	Scope type
☒	Purview Records	Site

Add

Cancel

COLLABDAYS 26

58

#collabdays



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Edit adaptive scope

✓ Name

✓ Admin unit

● Scope type

● Site query

○ Review

Create the query to define SharePoint sites

The query consists of one or more SharePoint property/value combinations used to define the sites you want this scope to apply to. You can refine the query by grouping attributes and connecting them using AND and OR operators. [Learn more](#)

+ Add property

< Group selected attributes

Advanced query builder

^ Site properties

☐

Site URL

*

starts with

repoint.com/sites/Purview

Query summary

SPSiteURL starts with https://on6ph.sharepoint.com/sites/Purview;

Verifying it actually works

When in pending state

Distribution takes time — policy distribution can take several days and isn't always visible in the interface.

Check with PowerShell — verify distribution rather than assuming the portal is up to date.

```
Connect-IPPSSession
```

```
Get-RetentionCompliancePolicy -Identity "<PolicyName>" `
    -DistributionDetail | FL
```

```
Set-RetentionCompliancePolicy -Identity "<PolicyName>" `
    -RetryDistribution
```

```
PS C:\> Set-RetentionCompliancePolicy -Identity "Retention 1 day" -RetryDistribution
WARNING: The content source has not reported a distribution error on policy 'Retention 1 day'. Because there's no error
on which to retry distribution, the RetryDistribution request has been ignored. If it's been longer than 2 hours since
the distribution timeout error, please contact Microsoft support to fix the deployment issue.
```

Disposition review

Triggered at end of retention — when a label configured for review reaches the end of its period.

Reviewers can act — approve disposal, relabel, extend, add another reviewer, or export the queue.

Up to five stages — each with its own reviewers; optional auto-approval timeout — use with caution.

Check before action

A documented, auditable decision trail instead of silent deletion.



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Edit retention label

✓ Name

✓ Label Settings

● **Period**

○ Finish

Define the retention period

Specify how long the retention period should be.

A new archive option is available for SharePoint. You can move items to a low-cost, compliant Microsoft 365 archive while your existing retention and deletion policies stay in place. Archived files can be reactivated at any time. This is a pay-as-you-go capability, you will be charged based on the amount you archive. [Learn more about pay-as-you-go billing](#)

Retain items for

Custom

of 0 years 0 months 14 days

Start the retention period based on

When items were labeled

☒ Archive retained items in secure and compliant Microsoft 365 Archive to reduce cost Pay-as-you-go

Archive after

of 0 years 0 months 14 days

Custom

Start the archive period based on

[+ Create new event type](#)

Back

Next

Cancel

What file level archiving actually does

- 01 Archiving is a state change on the file — the file itself is never moved out of its library.
- 02 The content is tiered to colder storage, while the item stays exactly where users expect it.
- 03 All metadata is preserved: name, path, version history, permissions and custom columns.
- 04 Archived content is no longer used for grounding by Microsoft 365 Copilot.
- 05 You need edit permissions to archive a file — but read permissions are enough to reactivate it.

11_Old_Deliverables

ShareCopy linkCopilot...+ Create or upload

Active DocumentsAll DocumentsAdd viewWXMPPDetails

Active Documents

Name	Modified	Modified By	Category	Status	+ Add col
Phoenix_Acceptance_Signoff_Sum... 	2 days ago	Pieter Kops	Project Management	Superseded	
Phoenix_Archive_Index.docx 	2 days ago	Pieter Kops	Project Management	Superseded	
Phoenix_Archive_Inventory.xlsx 	2 days ago	Pieter Kops	Project Management	Superseded	
Phoenix_Closeout_Team_Meeting_M... 	2 days ago	Pieter Kops	Project Management	Superseded	
Phoenix_Closure_Report.docx 	2 days ago	Pieter Kops	Project Management	Superseded	



ARCHIVE A FILE FROM THE DOCUMENT LIBRARY

Project-Phoenix

>

11_Old_Deliverables

>

Open

Share

Copy link

Name	
Phoenix_Acceptance_Signoff_Su	
Phoenix_Archive_Index.d...	
Phoenix_Archive_Inventory.xlsx	
Phoenix_Closeout_Team_Meeting	
Phoenix_Closure_Report.docx	
Phoenix_Configuration_Baseline	
Phoenix_Deliverables_Register	

Open

Preview

Share

Copy link

Copilot

Manage access

Delete

Add to favorites

Add shortcut

Download

Print

Rename

Pin to top

Move to

Copy to

Duplicate

Archive

Autofill columns

Pin to top

Modified By

Pieter Kops

Pieter Kops

Pieter Kops

Pieter Kops

Pieter Kops

Pieter Kops

Pieter Kops

Archiving also cuts your storage bill

- 01 Once a tenant goes over its SharePoint storage quota, every extra gigabyte is billed on top.
- 02 Archived content is charged at roughly 75% less than active storage for the same data.
- 03 Nothing is deleted to get there — the files stay in place, only their state changes.
- 04 So archiving pays twice: a cleaner Copilot grounding surface and a materially lower bill.

In short

01 Same place, different state: files stay in the library, only their content moves to cold storage.

02 Edit rights to archive, read rights to reactivate — low friction for the end user.

03 Metadata survives, Copilot grounding stops — less noise, lower cost, nothing lost.

04 Over quota? Archived data costs about 75% less than active storage.

Key takeaways

01 Copilot is a mirror, not a cause — it surfaces governance debt that already existed

02 Start with visibility before touching permissions or retention

03 Automate where you can, review where it matters

04 This is a continuous cycle, not a one-off project

One data estate, three layers of control

01

ROT triage — tells you what shouldn't be there

02

SharePoint Advanced Management — who can see what's left, and how to act on it

03

Records Management — how long it should stay, and proof you handled it responsibly



THANK YOU

Questions?

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