



M365 Retention for IT Helpdesks

What is it?

Systematic assignment of retention groups for all state employee emails and Teams chats, applied using retention policies available within M365 Purview.

Who is responsible?

Statewide coordination: Secretary of State Archives Division, DAS EIS M365 team

Agency-level coordination: Agency Records Officers

Creation and maintenance of retention policies in Purview: SOS Archives, DAS EIS

Application of retention triggers in AD profiles: Agency-level IT helpdesk

What is IT being asked to do?

Based on information provided by the agency records officer or other designee, apply a metadata value to “CustomAttribute14” (aka extensionAttribute14) that will correspond to one of a few retention policies within Purview. At this juncture, those metadata values are as follows:

3, 5, 7, 10, 26, P

Each of these values equates to “retain for X years, destroy”, with “P” representing “permanent”

Who makes decisions about what values to apply?

Identification of appropriate retention groups is the responsibility of agency records officers, with consultation and assistance from the SOS Archives team. IT is only responsible for application of the values as provided to them.

What happens when we apply the metadata values?

Once the local AD syncs up with the enterprise AD, M365 retention policies will be applied within 24 hours on average, after which the assigned retention policy will take effect, and will apply retroactively. It can take up to 30 days for the system to process all records past retention.

How often will we need to do this?

After initial application, whenever a new employee starts at an agency or changes position which requires movement to a longer retention group.

Any exceptions to this?

Litigation holds applied within Purview will override any existing retention policies until the hold is released. Also, since retentions are applied retroactively, agency personnel are being instructed NOT to lower an employee’s retention group when they change positions. This is not a decision IT is required to make, however, and IT can direct agency personnel to SOS Archives for assistance.