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### **Guide Description**

The purpose of this guide is to lay out the steps for configuring Azure Information Protection and DLP Policies. This guide is assuming you have the **M365 Business** License but can be applied to the following licenses:

- Azure Information Protection Plan 1
- EMS +E3, E5
- Office 365 E3 and greater
- Office 365 G3 and G5
- Office 365 A1, A3, and A5

#### \*\*Disclaimer\*\*

This guide is meant to provide best practices for policy creation and implementation of labels. It is meant to be used as a template, but the policies defined will not be the same in all use cases. You must access to policies and configuration you will need for your customers environment and make changes as needed. TMINUS is not liable for any policies you create that do not meet the customers standards. As a best practice, test all configurations with a pilot group before moving to broad deployment across an entire organization



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# Licensing Users

1. Ensure All appropriate Users are Licensed

•

a. Login to 365 Admin Center> Go to Active User

|    | Microsoft 365 admin cente | er     |   |
|----|---------------------------|--------|---|
| ≡  |                           | 1      | wraj records!   |
| ŵ  | Home                      |        | Ferentiale  |
| 8  | Users /                   | $\sim$ | Losentuals  |
|    | Active users              |        | User management   |
|    | Contacts                  |        |   |
|    | Guest users               |        | User management   |
|    | Deleted users             |        |   |
| æ  | Devices \                 | /      | Add, edit, and remove user accounts, and reset passwords. |
| RR | Groups                    | /      |   |
| 侵  | Resources N               | /      | Add user Edit user $\vee$                                 |
|    | Billing                   | /      |   |
|    |                           |        | Azura Activa Diractory                                    |

b. Select a User>Click Licenses and Apps>Ensure an M365 License is Assigned (or license defined on page 1)

|   | Display name ↑      | Username  | Licenses                             |                          | Blake Closner  |
|---|---------------------|---|--------------------------------------|--------------------------|--|
|   | Adams Aliasing Test | alongmire1@wrajrecords.com  | Unlicensed                           | BC                       | 9 0 A  |
|   | admin               | $admin\_marcusfor the win and stuff.on microsoft.com \# {\sf EXT}_{n}.$ | Unlicensed                           | Change photo             | Sign in allowed  |
|   | Administrator       | administrator@wrajrecords.com   | Unlicensed                           |                          |  |
|   | Andy Green          | agreen@wrajrecords.com  | Unlicensed                           | Account D                | evices Licenses and Apps Mail OneDrive   |
|   | Anthony Tonetti     | atonetti@wrajrecords.com  | Microsoft Flow Free, Power BI (free) | 6 L - 0 - 0              |  |
|   | Anthony Tonetti     | anthonytonetti@wrajrecords.com  | Unlicensed                           | United Stat              | es V   |
|   | Austin Lieber       | alieber@wrajrecords.com   | Unlicensed                           |                          |  |
|   | Axel Morlotte       | amorlotte@wrajrecords.com   | Unlicensed                           | Licenses (17)            |  |
|   | Betty Joe           | bettyjoe@wrajrecords.onmicrosoft.com                                    | Unlicensed                           | You don't<br>your parts  | nferencing<br>have any licenses available. To purchase additional licenses, please contac<br>her(s).                                   |
|   | Billy Prejean       | bprejean@wrajrecords.com  | Unlicensed                           | Azure Inf<br>1 of 1 lice | ormation Protection Plan 1<br>nses available   |
| 0 | Blake Closner       | bclosner@wrajrecords.com  | Microsoft 365 Business               | Domestic<br>1 of 2 lice  | : Calling Plan<br>nses available   |
|   | Brandon Smith       | bsmith@wrajrecords.com  | Unlicensed                           | Dynamic<br>9999 of 1     | s 365 P1 Trial for Information Workers   |
|   | Bruce Wayne         | bwayne@wrajrecords.com  | Unlicensed                           | Enterpris<br>1 of 2 lice | e Mobility + Security E3<br>nses available   |
|   | Carla Diffee        | cdiffee@wrajrecords.com   | Unlicensed                           | Exchange<br>You don't    | Online (Plan 1)<br>have any licenses available. To purchase additional licenses, please contact<br>additional licenses, please contact |
|   | cdeacon             | cdeacon_gflclan.com#EXT#@wrajrecords.onmicrosoft.c                      | Unlicensed                           | your pare                | t 265 Buringer   |



# **Azure Information Protection**

Azure information protection can be used to classify, label, and protect your companies' documents and email. AIP provides the following benefits:

- Secure your files and emails
  - Encryption, identity, authorization policies
- Platform independent
  - Phones, tablets, PCs (iOS/Android)
- Automatically apply policies, classify data, and apply encryption based of keywords or sensitive information (PII, SSN, etc.)

# Download the Plugin

a. You can install a plugin for outlook/office apps that gives users an Azure Information Protection button in their local outlook client and on top of their office suite toolbar. You can create custom labels to apply encryption to messages or documents. Here is <u>the link for the download</u>:

| Privacy Statement Version 1.48.204.0      Protection      Protection | Kicrosoft A    | zure Information Protec             | tion            |  |                          |               |          |            | ×       |
|--|----------------|-------------------------------------|-----------------|--|--------------------------|---------------|----------|------------|---------|
| Install the Azure Information Protection client         By clicking "I agree", you agree to the Azure Information Protection license terms and conditions.         License terms and conditions.         Install a demo policy         Experience Azure Information Protection by using a local policy until the client connects to Azure Information Protection by sending usage statistics to Microsoft         Privacy Statement         Version 1.48.204.0         Image: State Book - State   | A Mic          | rosoft Azure<br>mation Protection   |                 |  |                          |               |          |            |         |
| Install the Azure Information Protection client By clicking "I agree", you agree to the Azure Information Protection license terms and conditions. License terms and conditions. install a demo policy Experience Azure Information Protection by using a local policy until the client connects to Azure Information Protection service. Wersion 1.48.204.0   | MIL            |                                     |                 |  |                          |               |          |            |         |
| By clicking "I agree", you agree to the Azure Information Protection license terms and conditions.<br>License terms and conditions.<br>Install a demo policy<br>Experience Azure Information Protection by using a local policy until the client connects to Azure Information<br>Protection service.<br>Help improve Azure Information Protection by sending usage statistics to Microsoft<br>Privacy Statement<br>Version 1.48.204.0<br>To<br>Cc<br>Bcc  | Install the    | Azure Informati                     | n Protect       | tion client                                |                          |               |          |            |         |
| License terms and conditions.<br>Install a demo policy<br>Experience Azure Information Protection by using a local policy until the client connects to Azure Information<br>Protection service.<br>Help improve Azure Information Protection by sending usage statistics to Microsoft<br>Privacy Statement<br>Version 1.48.204.0<br>Insert Options FormatText Review Help Orell me what you want to do<br>Cateor (Bod - 11 - A^ A^ E = + = - A A A B = = = = = = = = = = = = = = = =   | By clicking "I | agree", you agree to t              | the Azure Info  | rmation Protecti                           | on license te            | rms and con   | ditions. |            |         |
| <ul> <li>☐ Install a demo policy</li> <li>Experience Azure Information Protection by using a local policy until the client connects to Azure Information Protection service.</li> <li>☑ Help improve Azure Information Protection by sending usage statistics to Microsoft</li> <li>Privacy Statement</li> <li>Version 1.48.204.0</li> <li>I agree</li> <li>Close</li> </ul>   | License terms  | and conditions.                     |                 |  |                          |               |          |            |         |
| L Install a demo policy<br>Experience Azure Information Protection by using a local policy until the client connects to Azure Information<br>Protection service.<br>→ Help improve Azure Information Protection by sending usage statistics to Microsoft<br>Privacy Statement<br>Version 1.48.204.0  |                |                                     |                 |  |                          |               |          |            |         |
| Protection service.<br>Help improve Azure Information Protection by sending usage statistics to Microsoft<br>Privacy Statement<br>Version 1.48.204.0   | Experience A:  | mo policy<br>zure Information Prote | ection by using | g a local policy u                         | ntil the client          | connects to   | Azure I  | nformat    | ion     |
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| Address Check     Address Check     Address Check     Attach Attach Signature<br>Fale - Herm - Signature     Protection     Protection     Dictate<br>Toga     Dictate<br>View     View     Customer<br>Manager       To     Cc       Bcc  | Privacy State  | ment                                |                 |  |                          |               |          |            |         |
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| Cc Bcc   | То             |                                     |                 |  |                          |               |          |            |         |
| Bec  | Cc             |                                     |                 |  |                          |               |          |            |         |
|  | Bcc            |                                     |                 |  |                          |               |          |            |         |



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|  |  |                     |                        |   |   |
|  |  |                     |                        |   |   |

#### Modifying and Creating Labels

By default, there is a global policy in place with default labels that we can already apply to documents and emails. In this section we are going to look at modifying existing labels and creating a new label of our own:

a. Navigate to portal.azure.com and sign in with your tenants global admin credentials:



b. Click on "All Services" and search for Azure Information Protection





| ces | Azure Information  | ×                                      |   |              |
|-----|--|--|---|--------------|
|     | <b>^</b>   | Azure Information                      | n Protection  | <b>2</b>     |
| g   |  | Resource groups<br>Keywords: CloudForm | ation   | *            |
|     | <ul> <li>Storage accounts</li> <li>Virtual networks</li> <li>Azure Active Directory</li> </ul> | 101                                    | Microsoft Learn<br>Learn Azure with free<br>online training from<br>Microsoft |              |
|     | <ul> <li>Monitor</li> <li>Advisor</li> <li>Security Center</li> </ul>                          | \$                                     | Cost Management<br>Analyze and optimize your<br>cloud spend for free          |              |
|     | <ul> <li>Cost Management + B</li> <li>Help + support</li> </ul>                                | II                                     |   |              |
|     | Azure Information Pro  | e Recei                                | nt resources See all your red   | cent resourc |
|     | https://portal.azure.com/#blade  | /Microsoft Azure CostMa                | nagement/Menu   |              |

c. Note: You can Star this to Add to your favorite's menu:

d. First, we will look at the default Global Policy by clicking on "Policies" and selecting the "Global Policy"
Home > Anne Information Protection - Policies

| Home > Azure Information Protection - Pe | blicies                           |  |
|--|-----------------------------------|--|
| Azure Information Protection             | - Policies                        |  |
| "  |                                   |  |
| , Search (Ctrl+/)                        |                                   |  |
| General                                  | Configure administrative name and | lescription for each policy                |
| Quick start                              | POLICY                            | DESCRIPTION                                |
| Analytics                                | Global                            | Default policy for all users in the tenant |
| III Usage report (Preview)               | + Add a new policy 🛛 🕥            |  |
| & Activity logs (Preview)                |                                   |  |
| Data discovery (Preview)                 |                                   |  |
| Ecommendations (Preview)                 |                                   |  |
| Classifications                          |                                   |  |
| Labels                                   |                                   |  |
| Policies                                 |                                   |  |
| Scanner                                  | 2                                 |  |



e. By default, there are no labels assigned to the policy so you will need to do that:

| nome / Azure mormation Frotection - Folicies / Folicy, Global              |         |         |            |   |          |
|--|---------|---------|------------|---|----------|
| Policy: Global<br>T-Minus 365 - Azure Information Protection               |         |         |            |   | $\times$ |
| 📰 Columns 🛛 R Save 🗶 Discard 👼 Delete 🞍 Export                             |         |         |            |   |          |
| Configure administrative name, description and scope for this policy       |         |         |            |   |          |
| * Policy name  |         |         |            |   |          |
| Global   |         |         |            |   |          |
| Policy description   |         |         |            |   |          |
| Default policy for all users in the topant                                 |         |         |            |   |          |
| belaux policy for all users in the tenant                                  |         |         |            |   |          |
| Select which users or groups get this policy. Groups must be email-enabled | d. 🕜    |         |            | > | ł        |
| LABEL DISPLAY NAME   | POLICY  | MARKING | PROTECTION |   |          |
| No labels  |         |         |            |   |          |
| Add or remove labels   |         |         |            |   |          |
| Configure settings to display and apply on Information Protection en       | d users |         |            |   |          |
| * Title  |         |         |            |   |          |
|  |         |         |            |   |          |

f. This is the default policy applied to all users. We can see different settings that we can configure. If you wanted to scope policies to certain groups of users, then you can create a new policy. For example, maybe I want to require all of my users in the Finance department to be required to apply a label when saving a document. I can create a new policy specifically for that.

| Policy: Global<br>T-Minus 365 - Azure Information Protection   |
|--|
| 📰 Columns 🛛 R Save 🗙 Discard 🟛 Delete 🚽 Export   |
| Select the default label   |
| None   |
| Send audit data to Azure Information Protection analytics ()<br>Off (Not configured)   |
| All documents and emails must have a label (applied automatically or by users)   |
| Users must provide justification to set a lower classification label, remove a label, or remove protection                                   |
| For email messages with attachments, apply a label that matches the highest classification of those attachments<br>Off Automatic Recommended |
| Display the Information Protection bar in Office apps  |
| Add the Do Not Forward button to the Outlook ribbon  |
| Off On   |
| Make the custom permissions option available for users   |



g. Now we can click "Labels" and take note of the different labels that can already be applied. If you have a newer office 365 tenant, then you many need to click on the "Generate Default labels" to see more:

| Home > Azure Information Protection | - Labels                                 |
|-------------------------------------|--|
| Azure Information Protection        | on - Labels                              |
|                                     |  |
| General                             | LABEL DISPLAY NAME                       |
| Quick start                         | <ul> <li>Protection templates</li> </ul> |
| Analytics                           | Confidential \ All Employees             |
| LL Usage report (Preview)           | Highly Confidential \ All Employees      |
| Activity logs (Preview)             | + Add a new label                        |
| 😨 Data discovery (Preview)          |  |
| Ecommendations (Preview)            |  |
| Classifications                     | $\searrow$                               |
| Labels                              |  |
| Policies                            |  |

#### **Azure Information Protection - Labels**





h. If you click into any label, you will be able to see its settings:

| Home > Azure Information Protection - Labels > Label: Highly Confidential  |   |   |
|--|---|---|
| Label: Highly Confidential<br>T-Minus 365 - Azure Information Protection   |   | × |
| 🕞 Save 🗙 Discard 🗴 🛱 Delete this label   |   |   |
| Specify how this label is displayed in the Information Protection client on user<br>devices<br>Enabled<br>Off On   |   | • |
| * Label display name<br>Highly Confidential<br>* Description   |   |   |
| Very sensitive business data that would cause damage to the business if it was shared with<br>unauthorized people. Examples influde employee and customer information, passwords,<br>source code, and pre-announced financial reports. |   |   |
| Color<br>Select from list Custom   |   |   |
| Red  | ~ |   |
| Set permissions for documents and emails containing this label   |   |   |
| Not configured Protect Remove Protection   |   | • |

i. Let's create a label to Encrypt messages/documents outside our organization. From the labels page, click "Add new Label"



Azure Information Protection - Labels



j. Enter your name, description, color:

| Label: I             | Encrypt<br>- Azure Informatio | n Protection                                    |            |
|----------------------|-------------------------------|---|------------|
| R Save               | × Discard                     | Delete this label                               |            |
| Specify h<br>devices | ow this label i               | s displayed in the Information Protection clier | nt on user |
| Enabled              |                               | N   |            |
| Off                  | On                            | μγ  |            |
| * Label di           | splay name                    |   |            |
| * Descript           | ion                           |   |            |
| encrypt e            | mail and Docs                 |   | ~          |
| 2                    |                               |   |            |
| Color                |                               | _   |            |
| Select fro           | om list Custo                 | n )   |            |
|                      |                               |   |            |

k. Click on **Protect.** Here we will be able to granularly define our settings. Leave Set Permissions and click **+Add Permissions** to define your scope of users this will apply to:

| Home > Azure Information Protection -  | Labels > Label > Protection |
|--|-----------------------------|
| .abel<br>Minus 365 - Azure Information Protection                                    |                             |
| 🖥 Save 🗙 Discard 🛅 Delete this la  | abel                        |
|  |                             |
| et permissions for documents and emain<br>Not configured <b>Protect</b> Remove Prot  | ails containing this label  |
|  |                             |
| Protection<br>Azure (cloud key)  | 0                           |
|  |                             |
| Protection<br>T-Minus 365 - Azure Information Protection                             |                             |
| Protection settings 🕕  |                             |
| Azure (cloud key) HYOK (AD RMS)  |                             |
| Select the protection action type 🚯  |                             |
| <ul> <li>Set permissions</li> <li>Set user-defined permissions (Previous)</li> </ul> | view)                       |
|  | PERMISSIONS                 |
| USEKS  | PERMISSIONS                 |
| No permissions are specified   |                             |
| + Add permissions  |                             |
|  |                             |
|  | 25                          |
| ( Never By date By days )  | - 2                         |



I. Here I can define my scope of users that I want this label to apply to. I am going to select the entire org but I could narrowly define different users/groups/departments if I wanted to and give them certain permissions to the documents. Click ok when complete

Ex. I want to give my HR department Co-Owner rights but everyone else in the org should have viewer rights.

|  | d groups   |                      |             |  |
|--|--|----------------------|-------------|--|
| Select from the  | e list Ent   | ter details          |             |  |
| + Add T-Minus  | 365 - All me   | mbers 🚯              |             |  |
| + Add any auth   | enticated us   | ers                  |             |  |
| + Browse direct  | ory  |                      |             |  |
| USERS  |  |                      |             |  |
| No users or arou   | up specified   |                      |             |  |
| 65 - Azure Information   | n Protection   | set custom           | 0           |  |
| e permissions fro  | m Protection<br>m preset or<br>Reviewer                          | set custom<br>Viewer | •<br>Custom |  |
| e permissions fro<br>vner Co-Author<br>ERMISSIONS  | m Protection   | set custom<br>Viewer | Custom      |  |
| e permissions fro<br>wner Co-Author<br>ERMISSIONS  | m Protection m preset or Reviewer                                | set custom<br>Viewer | Custom      |  |
| e permissions fro<br>wner Co-Author<br>ERMISSIONS<br>fiew, Open, Read  | n Protection<br>m preset or<br>Reviewer<br>(VIEW)<br>RIGHTSDATA  | set custom<br>Viewer | Custom      |  |
| e permissions fro<br>wner Co-Author<br>ERMISSIONS<br>Yiew, Open, Read<br>Yiew Rights (VIEW<br>dit Content, Edit (  | NProtection  Protection  Reviewer  (VIEW)  RIGHTSDATA  (DOCEDIT) | viewer               | Custom      |  |
| e permissions fro<br>wner Co-Author<br>ERMISSIONS<br>l'iew, Open, Read<br>l'iew Rights (VIEW<br>dit Content, Edit (<br>ave (EDIT)                                  | NProtection  Protection  Reviewer  (VIEW)  RIGHTSDATA  (DOCEDIT) | viewer               | Custom      |  |
| e permissions fro<br>wner Co-Author<br>ERMISSIONS<br>'iew, Open, Read<br>'iew Rights (VIEW<br>dit Content, Edit (<br>ave (EDIT)<br>'rint (PRINT)                   | Reviewer (VIEW) (DOCEDIT)  | set custom<br>Viewer | Custom      |  |
| e permissions fro<br>wner Co-Author<br>ERMISSIONS<br>'iew, Open, Read<br>'iew Rights (VIEW<br>dit Content, Edit (<br>ave (EDIT)<br>'rint (PRINT)<br>Copy (EXTRACT) | NProtection  | set custom<br>Viewer | Custom      |  |



m. I can also define if I want the document only to be viewed for a limited period of time and if I want to allow offline access. An example would be monthly reports sent out to the finance department that you want to expire after a specified time frame. I will leave these defaulted in this example.

| File Content Expiration   |
|---|
| Never By date By days   |
| Allow offline access  |
| Balance security requirements (includes access after revocation) with the flexibility to open protected content without an Internet connection. More information and recommended settings |
| Always Never By days  |
| Number of days the content is available without an Internet connection  |
| 7   |
| Protection template ID - template id is automatically generated after template is saved   |
| ОК  |
|   |
|   |

N. You can configure additional settings here such as header/footer messages and adding watermarks. To configure conditions for auto-applying a label, you need at least Azure Information Plan 2 subscription

| Documents with this label have  | a header                        |
|---------------------------------|---------------------------------|
| Cocuments with this label have  | a footer                        |
| Off On                          |                                 |
| Oocuments with this label have  | a watermark                     |
| Configure conditions for auto   | matically applying this label 🕦 |
| f any of these conditions are m | et, this label is applied       |
| CONDITION NAME                  | OCCURRENCES                     |
|                                 |                                 |
| no condition set                |                                 |



o. You have the ability to choose from pre-defined sensitive information types or you can click custom to type in your own keywords to detect. Here I will search for SSN:

| Condition<br>T-Minus 365 - Azure Information Protection    | $\Box$ × |
|--|----------|
| 🕞 Save 🗙 Discard 🗴 Delete                                  |          |
| Choose the type of condition  Choose the types Custom      |          |
| Choose an industry   |          |
| All Financial Medical and Health Privacy                   |          |
| Select information types                                   |          |
| NAME   |          |
| USA Social Security Number (SSN)                           |          |
| * Minimum number of occurrences                            |          |
| 1  |          |
| Choose the type of condition 👔<br>Information Types Custom |          |
| * Name   |          |
|  |          |
| Match exact phrase or pattern 🕤                            |          |
| Match as a regular expression                              |          |
| Match with case sensitivity                                |          |
| <sup>r</sup> Minimum number of occurrences<br>1            |          |
| Count occurrences with unique values only                  |          |



p. After you click save, you will see a new button that ask you how you would like to apply the label. If you choose recommended you will be able to write a custom message to the user. If you choose Automatic it will auto-apply

|  | OCCURRENCES                 |
|--|-----------------------------|
| USA Social Security Number (SSN)                                     | 1                           |
| + Add a new condition  |                             |
| Select how this label is applied: automatic<br>Automatic Recommended | ally or recommended to user |
| It is recommended to label this file as Encry                        | pt SSN                      |
|  |                             |
| Add notes for administrator use                                      | Ν                           |
| Add notes for administrator use                                      |                             |
| Add notes for administrator use                                      |                             |

q. After you click save you will now see your new label:



r. From here you can select the label to apply to documents and email messages





| ł | IN      | ; <u> </u>             | _ / .  |          | Ph                          | Ph  |            | <u>^</u>               | . 88.    | Law Carava          | C        |                   |                 |
|---|---------|------------------------|--------|----------|-----------------------------|---|------------|------------------------|----------|---------------------|----------|-------------------|-----------------|
| 1 |         |                        |        |          |                             | Untitled - Messa                                    | ge (HTML)  |                        |          |                     | T        |                   | $\angle \times$ |
| s | File    | Message                | Insert | Options  | Format Text Re              | eview Help  | Q Tell me  | e what you want        | to do    |                     |          |                   |                 |
| s | Paste   |                        |        |          | Address Check<br>Book Names | 0 Attach File →<br>2 Attach Item →<br>2 Signature → | Protect    | Assign ↓<br>Policy ▼ ↓ | Dictate  | Customer<br>Manager | Insights | View<br>Templates | Rc              |
| 5 | Clipboa | rd 🗔                   | Basic  | Text     | Names                       | Include   | Protection | Tags 🗔                 | Voice    |                     |          | My Templates      | ^               |
|   | 2       | Sensitivity: <b>No</b> | t set  | Personal | Public                      | General   |            | Confidential           | Highly ( | Confidential        | Enc      | rypt              | × ad            |
|   | Send    | To     Cc     Subject  |        |          |                             |   |            |                        |          |                     |          |                   |                 |
| 8 |         |                        |        |          |                             |   |            |                        |          |                     |          |                   |                 |

# Data Loss Prevention Policies

Within the Compliance center of a tenant, we can configure custom DLP polices that can auto-apply to content across Exchange, OneDrive, SharePoint, and Teams. There are pre-defined templates that relate to certain compliance regulations like HIPAA and FINRA. In this tutorial, we will be configuring a policy for HIPAA.

a. In the admin center for the 365 tenant, click "Compliance" Under admin centers:





b. Here we can see the labels we were just looking at as well as the ability to create new policies. Click Policies, then Data loss prevention:

| Microsoft 365 col   | inplance i   |         |
|---|--|---------|
| =   |  |         |
| ☆ Home  | Policies   |         |
| ▲ Alerts  | Set up policies to govern data, manage devices, and receive alerts about various activities in your org. Learn mo<br>policies  |         |
| └── Monitoring & reports  | s  |         |
| Classification  |  |         |
| Labels  | V Policy type  |         |
| Label policies  | Office 365 alert   |         |
| Label analytics   | Cloud App Security   |         |
| 🛬 Policies  | $\sim$ Data (2)  |         |
|   | Data loss prevention   |         |
| Solutions   | Retention  |         |
| Microsoft 365 compli  | liance   |         |
| Microsoft 365 compli  | iance Policies   |         |
| Microsoft 365 compli<br>Home  | liance Policies Set up policies to govern data, manage devices, and receive alerts about various activities in your org  | . Learr |
| Microsoft 365 compli<br>iome<br>Verts<br>Aonitoring & reports   | liance Policies Set up policies to govern data, manage devices, and receive alerts about various activities in your org policies   | . Learr |
| Microsoft 365 compli<br>Home<br>Nerts<br>Aonitoring & reports   | iance Policies Set up policies to govern data, manage devices, and receive alerts about various activities in your org   | . Learr |
| Microsoft 365 compli<br>tome<br>Verts<br>Vonitoring & reports<br>Jassification<br>abels   | Policies         Set up policies to govern data, manage devices, and receive alerts about various activities in your orgolicies         Policy type  | . Learr |
| Microsoft 365 compli<br>tome<br>Alerts<br>Vonitoring & reports<br>Jassification<br>.abels<br>.abel policies   | Policies Set up policies to govern data, manage devices, and receive alerts about various activities in your org policies Policy type Policy type  | . Learr |
| Microsoft 365 compli<br>tome<br>Alerts<br>Monitoring & reports<br>Lassification<br>Labels<br>Label policies<br>Sensitive info types   | Iiance         Policies         Set up policies to govern data, manage devices, and receive alerts about various activities in your orgolicies         Policy type         Office 365 alert  | . Learr |
| Microsoft 365 compli<br>Home<br>Alerts<br>Aonitoring & reports<br>Hassification<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habe | Folicies         Set up policies to govern data, manage devices, and receive alerts about various activities in your orgolicies         Policy type         Office 365 alert         Cloud App Security                            | . Learr |
| Microsoft 365 compli<br>Home<br>Alerts<br>Monitoring & reports<br>Lassification<br>Labels<br>Labels<br>Label policies<br>Sensitive info types<br>Label analytics<br>Volicies  | Folicies         Set up policies to govern data, manage devices, and receive alerts about various activities in your orgolicies         Policy type         Office 365 alert         Cloud App Security         V         Data (2) | . Learr |
| Microsoft 365 compli<br>Home<br>Alerts<br>Monitoring & reports<br>Hassification<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habels<br>Habe | Folicies Set up policies to govern data, manage devices, and receive alerts about various activities in your orgolicies Policy type Policy type Policy type Office 365 alert Cloud App Security Data (2) Data loss prevention      | . Learr |

c. You will be redirected to the Security and Compliance center. Here we can see reports and create new policies. We will click "+ Create a policy"

| Office 365 Security & Compliance |  |
|----------------------------------|--|
| <                                | Home > Data loss prevention<br>Use data loss prevention (DLP) policies to help identify and protect your organization's sensitive info. For even |
| ය Home                           | make sure information in email and docs isn't shared with the wrong people. Learn more about DLP   |
| $\Lambda$ Alerts $\checkmark$    | └── DLP policy matches ···· └── DLP false positives and ov ···   |
| A <sup>R</sup> Permissions       | 0  |
|                                  |  |
| Data loss prevention             | 05/20 05/22 05/24 05/20 05/22 05/24  |
|                                  | + Create a policy O Refresh Search   |
|                                  | ✓ Name Order ^ Modified date Statu   |



d. We are going to choose "medical" and select "US Health Insurance Act (HIPAA)"

| New DLP policy                    | Start with a template o  | or create a custom policy  |
|-----------------------------------|--|--|
| Choose the information to protect | Choose an industry regulation to see the<br>If you need to protect labeled content, yo | DLP policy templates you can use to protect that info or create a custom pol<br>u'll be able to choose labels later. |
| Name your policy                  | Learn more about DLP policy templates<br>Search  | Show options for All countries or regions  |
| Choose locations                  | Financial  | Australia Health Records Act   |
| Policy settings                   | See Medical and health   | Canada Health Information Act  |
| Review your settings              | Privacy  | (AIH)  |
|                                   | Custom   | Canada Personal Health<br>Information Act (PHIA) -<br>Manitoba   |
|                                   |  |  |

Start with a template or create a custom policy

| Custom | Manitoba  |
|--------|---|
|        | Canada Personal Health Act<br>(PHIPA) - Ontario |
|        | U.K. Access to Medical Reports<br>Act           |
|        | U.S. Health Insurance Act (HIPAA)               |
|        | -fm   |
|        |   |

e. After we click next, we can add a name and description:

1)

| ::: Office 365 Security & Compliance |                                   |
|--------------------------------------|-----------------------------------|
| New DLP policy                       | Name your policy                  |
|                                      | Name *                            |
| Choose the information to protect    | U.S. Health Insurance Act (HIPAA) |
| Name your policy                     | Description                       |
| Choose locations                     | Protect <u>HIPAA</u> data<br>I    |
| Policy settings                      |                                   |
| Review your settings                 | Back Next Cancel                  |



f. You can choose specific locations choosing only exchange for example or selecting all. I will be leaving this defaulted.

| ::: Office 365 Security & Compliance |  |
|--------------------------------------|--|
| New DLP policy                       | Choose locations   |
| Ochoose the information to protect   | We'll protect content that's stored in the locations you choose. * |
| Name your policy                     | O Let me choose specific locations.                                |
| Choose locations                     | Back Next Cancel   |
| Policy settings                      |  |

g. Next you can customize the items you want to protect, I am going to leave these settings defaulted.





 Here you can modify the conditions of which action is taken when sensitive content is found. NOTE If you choose the encrypt method, this can only apply to exchange. You may want to create 2 separate policies if you want this encryption but also want to apply polices to SharePoint, OneDrive, and Teams



i. Next, we can get even more granular with our settings, blocking outside users from accessing content that contains PII or allowing users to override our policy

| New DLP policy                     | Customize access and override permissions   |
|------------------------------------|---|
| Ochoose the information to protect | By default, users are blocked from sending email and Teams chats and channel messages that con<br>But you can choose who has access to shared SharePoint and OneDrive files. You can also decide i<br>restrictions. |
| S Name your policy                 | Block these people from accessing SharePoint, OneDrive, and Teams content   |
| Ochoose locations                  | <ul> <li>Everyone ()</li> <li>Only people outside your organization ()</li> </ul>   |
| Policy settings                    | Let people $w_{1}ho$ see the tip override the policy  |
| Review your settings               | <ul> <li>Require a business justification to override</li> <li>Override the rule automatically if they report it as a false positive</li> </ul>   |
|                                    | Back Next Cancel  |



# j. Lastly, you can decide if you want to test the policy out first before making it GA to the entire tenant

| New DLP policy                    | Do you want to turn on the policy or test things out first?   |  |  |
|-----------------------------------|---|--|--|
| Choose the information to protect | Do you want to turn on the policy right away or test things out first?<br>Keep in mind that after you turn it on, it'll take up to an hour for the policy to take effect. |  |  |
| Name your policy                  | Yes, turn it on right away  |  |  |
| Choose locations                  | <ul> <li>Show policy tips while in test mode</li> <li>No, keep it off. I'll turn it on later.</li> </ul>  |  |  |
| Policy settings                   | Back Next Cancel  |  |  |
| Review your settings              |   |  |  |

# k. If our settings look ok, we can click create

| Office 365 Security & Compliance  |   |      |
|-----------------------------------|---|------|
| New DLP policy                    | Review your settings                                      |      |
| Choose the information to protect | <b>Template name</b><br>U.S. Health Insurance Act (HIPAA) | Edit |
| Choose locations                  | <b>Policy name</b><br>U.S. Health Insurance Act (HIPAA)   | Edit |
| Policy settings                   | Description   | Edit |
| Review your settings              | Applies to content in these locations                     | Edit |
|                                   | Exchange email<br>SharePoint sites<br>OneDrive accounts   |      |
|                                   |   |      |



I. If a message is detected with the settings you define, the user will get a message rejection and policy tip. NOTE: if you are testing, only legitimate pieces of sensitive info will trigger the policy

| Notifi | cation:                              | SSN  |  |   |
|--------|--------------------------------------|--|--|---|
| МО     | Microso<br>Today, 8:23<br>Nick Ross; | o <mark>ft Outlook</mark><br>AM<br>Nick Ross ¥           |  |   |
|        | $\geq$                               | SSN<br>8 KB  | ~  |   |
|        | Download                             | Save to OneDrive - wraj recor                            | ds!  |   |
|        | Your em                              | ail message conflicts with                               | a policy in your organiz                             | zation. Issues:                             |
|        | • Me                                 | essage is sent to people o<br>essage contains the follow | utside your organizatio<br>ving sensitive informatio | n.<br>on: U.S. Social Security Number (SSN) |
|        | Message                              | e is attached.   | 2  |   |
|        | Thank yo                             | ou for your prompt response.                             | Thank you for your email.                            | Thank you for your request.                 |
|        | Report inap                          | propriate text   |  |   |

# **Retention Policies**

We can create custom retention policies for certain content in certain locations. By default content is retained for 30 days after deletion. You may want to create custom retention polices for certain content. In this tutorial we are going to be creating custom retention policy for a Teams channel.

a. In the admin center for the 365 tenant, click "Compliance" Under admin centers:





b. Click Policies and Retention



c. You will be redirected to the security and compliance center. Here we can click "+Create"

| ::: Office 365 Security & Co | ompliance     |   |  |            |  |
|------------------------------|---------------|---|--|------------|--|
| Data loss prevention         | Home > Reto   | Home > Retention<br>Email, documents, Skype and Teams conversations. Your users generate a lot of content every day. Take control |  |            |  |
| Records management           | keep what you | keep what you want and get rid of what you don't. Learn more about retention  |  |            |  |
| 🔒 Data governance            | ∧ Labels      |   | Label policies   |            |  |
| Dashboard                    |               | Croate labels to lat users  | Create label policies to                               |            |  |
| Import                       |               | manually classify and   | publish or automatically<br>apply evisting labels to   |            |  |
| Archive                      | •             | (email, docs, folders, and<br>more). You can also auto-   | your users apps (Outlook,<br>SharePoint, OneDrive, and |            |  |
| Retention                    |               | apply labels to specific<br>content.  | more).   |            |  |
| Supervision                  | + Creat       | te O Refresh Searc  | h ,  |            |  |
| 🔬 Threat management          | ~             | D.  |  |            |  |
| Mail flow                    | V Name        | 2   | Created by   | Last modif |  |

d. First, we can name our policy and click next

| a<br>o   | Create a policy to retain what you<br>want and get rid of what you<br>don't. | Name your policy                             |
|----------|--|--|
| а        | Name your policy   | Name * ()<br>Teams Retention                 |
| h        | Settings   | Description                                  |
| ic<br>hi | Choose locations   | Enter a friendly description for your policy |
| ei<br>ie | Review your settings   | Next Cancel                                  |



# e. Here you can define your settings:

| Create a policy to retain what you<br>want and get rid of what you<br>don't. | Decide if you want to retain content, delete it, or both                        |
|--|---|
| 🤣 Name your policy   | Do you want to retain content? ① <ul> <li>Yes, I want to retain it ①</li> </ul> |
| Settings   | For this long  7 years  |
| Choose locations   | For this longased on when it was created •                                      |
| Review your settings   | Yes      No     No, just delete content that's older than ()                    |
|  |   |

f. Now I will add the Team channel toggle and choose the team I want it to apply to:

| ta Create a policy to retain what you<br>want and get rid of what you<br>don't. | Choose la | ocations  |                     |                       |
|---|-----------|---|---------------------|-----------------------|
| ta 📀 Name your policy   |           | Skype for pushiless                                 |                     |                       |
| sh 🧭 Settings   |           | E 🛛 Exchange public folders                         |                     |                       |
| Choose locations  |           |   |                     |                       |
| tel  Review your settings   |           | Teams channel messages                              | All<br>Choose teams | None<br>Exclude team: |
| re.   |           | $\mathbf{T}_{\mathcal{D}}^{\mathbb{N}}$ Teams chats |                     |                       |
|   |           | ¬   | 7                   |                       |



| Edit locations   |  |
|--|--|
| TB   |  |
| Teams channel messages   |  |
| Search   |  |
| <ul> <li>Migrations Migrations@tminus365.com</li> <li>Compliance Compliance@tminus365.com</li> <li>Stocks Stocks@tminus365.com</li> <li>Security Security@tminus365.com</li> <li>Intune Pilot 7c0947591@tminus365.com</li> </ul> | 2  |
|  | Teams channel messages   Choose which teams to choose from the list below.   Search   Migrations Migrations@tminus365.com   Compliance Compliance@tminus365.com   Stocks Stocks@tminus365.com   Stocks Stocks@tminus365.com   Security Security@tminus365.com   Intune Pilot 7c0947591@tminus365.com   M365 M365@tminus365.com |

g. After I am done reviewing my settings I can select create:

| fice 365 Security & Compliance   |  |      |  |  |
|--|--|------|--|--|
| <ul> <li>Create a policy to retain what you</li> <li>want and get rid of what you</li> <li>don't.</li> </ul> | Review your settings   |      |  |  |
|  | riangle It will take up to 1 day to apply the retention policy to the locations you chose. |      |  |  |
|  | Policy name  | Edit |  |  |
| h 🥝 Settings   | Teams Retention  |      |  |  |
| c Ochoose locations  | Description  | Edit |  |  |
| Review your settings   | Applies to content in these locations  | Edit |  |  |
| Neview your settings   | Teams channel messages   |      |  |  |
| e  | $\searrow$   |      |  |  |
| 24   | Settings   | Edit |  |  |
|  | Retention period   |      |  |  |
|  | Keep content for 7 years   |      |  |  |
|  |  |      |  |  |



## Conclusion

I hope this article provided you some targeted guidance on DLP polices. Any feedback to improve your experience would be greatly appreciated. I would also like to hear if there is more content that you would like to see in this guide. Any feedback can be sent to my email below:

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