training code: SC-5007 / ENG DL 1d / EN

Implement retention, eDiscovery, and Communication compliance in Microsoft Purview

The training focuses on the practical implementation of compliance features in Microsoft Purview: retention and records management, eDiscovery (including eDiscovery (Premium)), Communication Compliance, and Content Search. Participants learn how to design and configure retention policies and labels, manage eDiscovery cases from creation through analysis and data export, and identify and address communication risks in Microsoft 365 channels to support regulatory, legal, and internal policy requirements.

Training recipients

- Microsoft 365 administrators and compliance and information protection specialists,
- Auditors and those responsible for data governance, retention, and records management,
- Legal and HR teams, as well as investigators who use eDiscovery,
- Security professionals and process owners who want to implement and maintain Communication Compliance in Microsoft Purview.

Benefits

1. Configuring retention policies and labels in Microsoft Purview – understanding the differences between retention policies and retention labels, as well as scenarios for their use.
2. Records management and disposition – declaring records and conducting reviews before permanently deleting content.

3. Creating and managing eDiscovery cases (including eDiscovery (Premium)) – creating cases, adding data sources, and applying holds.
4. Searching, analyzing, and preparing evidence – exercises on using content search, review sets, filtering, and exporting data.
5. Implementing Communication Compliance – configuring policies, monitoring alerts, and conducting investigations to mitigate communication risks.

Training program

1.Implementing and managing retention in Microsoft Purview.
- Overview of retention in Microsoft Purview.
- Creating and configuring retention policies – static and adaptive scopes.
- Creating and publishing retention labels and applying them in Microsoft 365 services.
- Event-based retention.

2.Managing records and disposition with Microsoft Purview.
- Planning retention and disposition using retention labels.
- Automatic application of labels (e.g., trainable classifiers) and policy and label precedence rules.
- Declaring items as records and disposition reviews.

3.Microsoft Purview eDiscovery.
- Introduction to eDiscovery and differences between eDiscovery (Standard) and eDiscovery (Premium).
- Creating and managing eDiscovery cases.
- Managing data sources and holds (custodians, non-custodial data sources, holds).
- Searching for content and working with review sets: filtering, analysis, preparation, and export.

4.Microsoft Purview Communication Compliance.
- Planning and implementing Communication Compliance policies (policy templates, conditions, escalations).
- Monitoring, investigation, and corrective actions: alerts, content review, remediation.

Expected preparation of the participant

- Basic understanding of concepts related to data governance and compliance.
- General familiarity with Microsoft 365 services and administrative portals.
- Basic knowledge of data lifecycle management (retention, deletion, archiving) and eDiscovery requirements.
- Familiarity with communication compliance requirements (e.g., code of conduct policies) is helpful.

To increase the comfort of work and training’s effectiveness we suggest using an additional monitor. The

lack of additional monitor does not exclude participation in the training, however, it significantly influences the comfort of work during classes.
You can find information and requirements of participation in Distance Learning trainings at: https://www.altkomakademia.pl/en/how-it-works/about-courses/

Training Includes

- manual in electronic form available on the platform: https://learn.microsoft.com/pl-pl/training/
- access to Altkom Akademia's student portal

Duration

1 days / 7 hours

Language

- Training: English
- Materials: English