

# Microsoft Teams Retention Policy Configuration in Microsoft Purview


## Overview

This configuration implements a Microsoft Teams retention policy using Microsoft Purview Data Lifecycle Management to automatically retain and delete Teams chat and channel messages after a defined retention period.

The policy helps organisations:

- Align with data governance and retention requirements
- Reduce unnecessary long-term data storage
- Support GDPR data minimisation principles

This implementation applies retention to:

- Teams 1:1 chats
- Teams group chats
- Teams meeting chats
- Teams channel messages

Once the retention period expires, messages are automatically deleted and are no longer recoverable through standard user access or Data Subject Access Requests (DSARs).

## Prerequisites

**Required licensing:**

- Microsoft 365 A3/A5 or E3/E5 equivalent licensing
- Microsoft Purview Data Lifecycle Management access

### **Required roles and permissions:**

- Compliance Administrator
- or
- Purview Data Lifecycle Management Administrator

### **Dependencies:**

- Microsoft Teams enabled in tenant
- Microsoft Exchange Online enabled
- Microsoft Purview portal access

### **Preparation tasks:**

- Review existing retention and eDiscovery policies
- Confirm no conflicting legal hold requirements exist
- Prepare user communications prior to go-live

## **Step 1: Access Microsoft Purview**

1. Open the Microsoft Purview portal:

<https://purview.microsoft.com>

2. Sign in using an administrative account with appropriate permissions.
3. From the left-hand navigation pane, select:

Solutions > Data lifecycle management > Retention policies

4. Select:
  - New retention policy

## **Step 2: Configure Policy Scope**

1. Enter a policy name.

Recommended naming convention:

Teams Chat Retention – 2 Years *(enter the number of years that Teams messages will be retained before deletion.)*

2. Optionally provide a description including:

- Business justification
- Approval reference
- RFC number
- Implementation date

Example:

Retains Teams chat and channel messages for 2 years in alignment with institutional data retention policy.

3. Select:

Static

4. Continue to location configuration.

### **Step 3: Target Resources / Components**

Select the following Microsoft 365 locations:

- Teams chats
- Teams channel messages

#### **Recommended scope:**

- All users (enterprise-wide deployment)

#### **Optional phased rollout:**

- Select specific pilot users or groups during testing phase

#### **Important:**

This configuration targets:

- Teams 1:1 chats
- Group chats
- Meeting chats
- Channel conversations

#### **This policy does NOT apply to:**

- Teams meeting recordings
- SharePoint files
- OneDrive files
- Email retention

These workloads require separate retention policies.

## Step 4: Configure Retention Settings

1. Choose:

Retain items for a specific period

2. Configure retention duration:

2 Years

3. Start retention based on:

When items were created

### Recommended rationale:

Using creation date ensures predictable and consistent lifecycle management and prevents indefinite retention caused by message edits.

4. After the retention period:

Delete items automatically

5. Review the policy summary carefully before proceeding.

### Recommended configuration:

- Retain content for 2 years
- Automatically delete after expiry

## Step 5: Access Control / Enforcement

Policy enforcement is handled automatically by Microsoft Purview once deployed.

Important operational notes:

- Users cannot bypass centrally managed retention settings
- Messages deleted after expiry are permanently removed from standard access
- eDiscovery or Litigation Hold policies override deletion where applicable

Why this matters:

This ensures:

- Consistent organisational retention enforcement
- Reduced data sprawl

- Improved compliance posture
- Controlled information lifecycle management

## **Step 6: Testing / Report Mode**

Recommended safe rollout approach:

### **Phase 1: Pilot Deployment**

1. Deploy policy to:

- IT administrators
- Small pilot group
- Test accounts

2. Validate:

- Messages remain accessible during retention period
- Older content is identified correctly
- No unexpected user impact occurs

3. Perform test exports using Microsoft Purview eDiscovery.

### **Validate:**

- Teams chats can be searched
- Export formats are usable
- Retention scope behaves as expected

Suggested test scenarios:

- 1:1 chat retention
- Group chat retention
- Meeting chat retention
- eDiscovery export validation

Important:

Retention processing may take several days to fully apply due to Microsoft background processing.

## **Step 7: Monitoring & Validation**

Monitoring locations:

Microsoft Purview Portal:

**Solutions > Data lifecycle management > Retention policies**

#### Validation checks:

- Policy status shows enabled
- Locations are correctly assigned
- No policy errors present

#### Additional monitoring:

- Review Purview audit logs
- Validate Teams message lifecycle behaviour
- Confirm retention processing completion

#### Expected behaviour:

- Messages older than retention threshold become unavailable
- Users lose access to expired messages
- Content becomes unavailable through standard retrieval methods

#### Troubleshooting indicators:

- Policy not applying after several days
- Users outside expected scope
- Retention conflicts with existing compliance policies

## **Step 8: Enforcement / Go-Live**

1. Expand policy scope to all required users.
2. Confirm organisational communications have been issued.

## **Important Considerations**

- Teams chat retention does not automatically apply to Teams meeting recordings
- Recordings stored in OneDrive or SharePoint require separate retention configuration
- Deleted messages cannot be recovered once permanently removed
- Data Subject Access Requests cannot retrieve deleted content after retention expiry
- Litigation Hold or eDiscovery Hold overrides retention deletion
- Retention processing is not immediate and may take several days

#### **Potential operational impact:**

- Users may lose access to historical conversations
- Teams should not be used as a long-term records repository

#### **Operational recommendations:**

- Store important records in SharePoint or approved document systems
- Avoid relying on Teams chat for permanent record keeping
- Validate eDiscovery export functionality periodically

## Summary

This implementation deploys a Microsoft Teams retention policy through Microsoft Purview to retain Teams chat and channel messages for a defined period before automatic deletion.

### **The policy supports:**

- Data minimisation
- Compliance requirements
- Reduced long-term data exposure
- Consistent lifecycle management across collaboration platforms

Once enforced, Teams chat content exceeding the retention period is automatically and permanently deleted in accordance with organisational policy.

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