

## SC-5007 Implement retention, Discovery, and Communication compliance in Microsoft Purview

### Overview

**Course Duration:** 1 Days

#### *About This Course*

Manage data lifecycle, records management, eDiscovery, and communication compliance with Microsoft Purview. This course teaches you how to handle records, implement retention policies, and use eDiscovery to identify and manage information for compliance and regulatory needs.

#### *Audience Profile*

IT and compliance professionals.

#### *Course Outline*

##### **Module 1: Implement and manage retention with Microsoft Purview**

This module covers retention policies, labels, event-based retention, and disposition reviews.

##### **Lesson**

- Understand the differences between retention policies and retention labels
- Configure retention policies.
- Create, publish, and automate retention labels.
- Implement event-based retention.

##### **Module 2: Manage records and disposition with Microsoft Purview**

Learn how to preserve, collect, analyze, review, and export content for internal and external investigations.

##### **Lesson**

- Plan retention and disposition strategies using labels
- Organize and manage labels with the file plan.
- Automate label application using policy conditions.
- Declare content as records or regulatory records
- Configure and manage disposition reviews

##### **Module 3: Understand Microsoft Purview eDiscovery**

Discover how Microsoft Purview supports a defensible eDiscovery process across Microsoft 365 services. Review how organizations can manage investigations by preserving content, running searches, analyzing results, and controlling access through role-based permissions..

##### **Lesson**

- Describe the purpose and stages of the eDiscovery process.
- Compare the classic and new eDiscovery experiences in Microsoft Purview.
- Explain how Microsoft 365 licensing affects feature availability in eDiscovery.
- Identify how permissions are used to control access to sensitive case data.

##### **Module 4: Create and manage eDiscovery cases**

Microsoft Purview eDiscovery provides a case-based structure for managing legal, compliance, and security investigations. Each case acts as a secure workspace for collecting, reviewing, and exporting relevant content. With configurable options for permissions, access, data sources, and analytics, cases help teams enforce control, maintain accountability, and tailor investigations to their organizational needs.

#### Lesson

- Configure prerequisites for using Microsoft Purview eDiscovery.
- Create and manage eDiscovery cases for investigations.
- Assign users and guest reviewers to cases with appropriate permissions.
- Configure case-level settings for search, analytics, and review sets.

#### Module 5: Manage data sources and holds in Microsoft Purview eDiscovery

Managing data sources and applying holds in Microsoft Purview eDiscovery helps ensure that investigations are scoped correctly and that relevant content is preserved. Defining where to search, applying hold policies, and using PowerShell to confirm preservation are key steps in supporting legal and regulatory requirements.

#### Lesson

- Identify and configure the content sources used in eDiscovery searches and holds.
- Apply tenant-wide or scoped holds based on the needs of an investigation.
- Review and adjust existing hold policies as cases progress.
- Use PowerShell to verify hold settings and data preservation.

#### Module 6: Search for content with Microsoft Purview eDiscovery

Use Microsoft Purview eDiscovery to search for content across Microsoft 365. This module covers how to configure cases, define search criteria, and locate messages, files, and other organizational data.

#### Lesson

- Assign the roles and permissions to access Microsoft Purview eDiscovery.
- Create and manage cases used to run eDiscovery searches.
- Define search scope and build queries using conditions, keywords, and Copilot-generated prompts
- Run searches and validate results using statistics or random samples.

#### Module 7: Analyze and prepare content in eDiscovery review sets

Microsoft Purview eDiscovery includes review sets to help legal and compliance teams manage, analyze, and prepare content during an investigation. Review sets provide a structured workspace where teams can filter, tag, summarize, and export case data in a repeatable, defensible way.

#### Lesson

- Create and populate review sets with case content
- Filter, group, and tag items for legal and compliance review.
- Run analytics to reduce data volume and identify key documents.
- Export reviewed items or reuse them in other review sets.
- Generate query reports to compare keyword and KeyQL query results.

#### Module 8: Detect and address communication risks with Microsoft Purview Communication Compliance

Microsoft Purview Communication Compliance is a solution that helps organizations address code-of-conduct policy violations in company communications, while also assisting organizations in regulated industries meet specific supervisory compliance requirements. Communication Compliance uses machine learning to intelligently detect violations across different communication channels such as Microsoft Teams, Exchange Online, or Yammer messages.

### Lesson

- List the enhancements in communication compliance over Office 365 Supervision policies, which it be replaced.
- Explain how to identify and remediate code-of-conduct policy violations.
- List the prerequisites that need to be met before creating communication compliance policies.
- Describe the types of built-in, pre-defined policy templates.

### **Module 9: Implement retention, eDiscovery, and Communication compliance in Microsoft Purview**

This module guides you through implementing data compliance and governance using Microsoft Purview, ensuring your organization meets regulatory requirements and manages data effectively.

### Lesson

- Create retention policies.
- Implement retention labels.
- Conduct an eDiscovery (Premium) investigation.
- Create a communication compliance policy

### *Prerequisites*

Before attending this course, students should have understood:

- Basic understanding of data governance and compliance concepts.
- Familiarity with Microsoft Purview and its interface.
- Knowledge of data lifecycle management principles.
- Experience with eDiscovery processes.
- Awareness of communication compliance requirements