



How to Migrate In-Place Records to Purview Retention Labels

With AvePoint Opus

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Changes to In-Place records management

Microsoft is making some changes to SharePoint Online to simplify how organizations manage and protect their data. Starting in April 2026, several older features—like Information Management Policies, In-Place Records Management, and certain site and document deletion options—will be retired. Instead, Microsoft recommends using modern solutions like Purview Data Lifecycle Management and Purview Records Management, which offer more flexible and up-to-date tools for keeping your data safe and compliant.

If your organization currently uses any of these legacy features, AvePoint have implemented a solution in Opus to identify and update your In-Place Records to a Purview retention label configured to mark a file as a record, which aligns closely with the immutable nature of In-Place records.

Required licensing to take action

In order to upgrade your records you will need the following licenses:

- One single Microsoft license to set up a retention label in Microsoft Purview which can be any of the following:
 - Microsoft 365/Office 365
 - E5
 - A5
 - G5
 - Add-on licenses for E3/A3/G3
 - Microsoft 365 E5 Compliance
 - Microsoft 365 E5 Information Protection & Governance
 - Frontline licenses for F1/F3
 - Microsoft 365 E5 Compliance
 - Microsoft 365 E5 Information Protection & Governance
- AvePoint Opus (either):
 - Action & Store
 - Information Lifecycle

Getting started

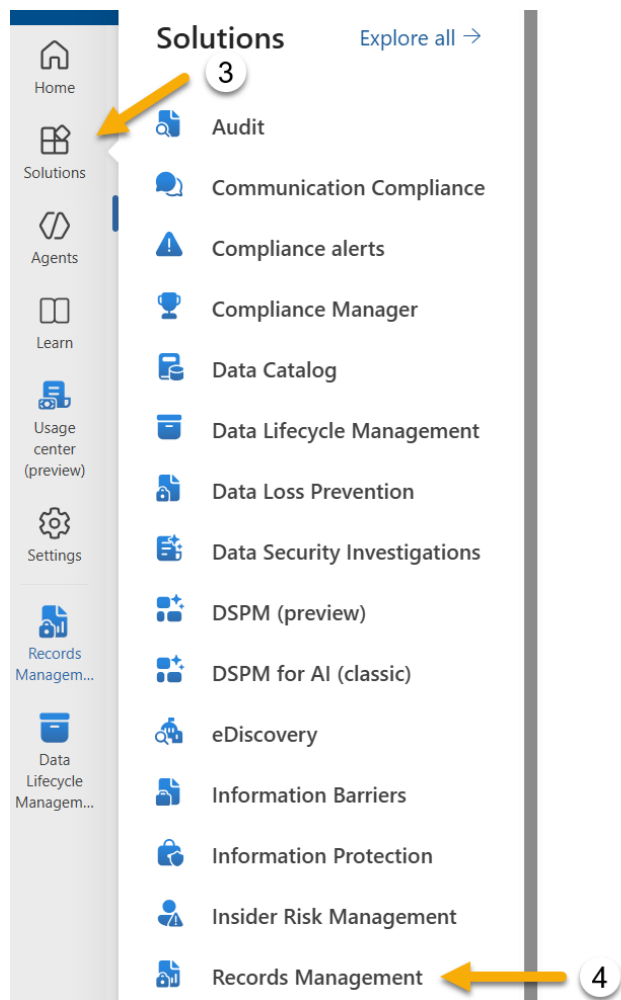
To migrate your In-Place records over to a new retention label, you will need to have a retention label configured with mark file as record set up in Microsoft Purview to get started. If you are yet to set up any retention labels that mark files as records, you can follow these steps to set one up. Please note that the individual setting up the retention label will need an E5 license to proceed.

If you already have a retention label you plan to use, please document the name of the label and proceed to **page 11**.

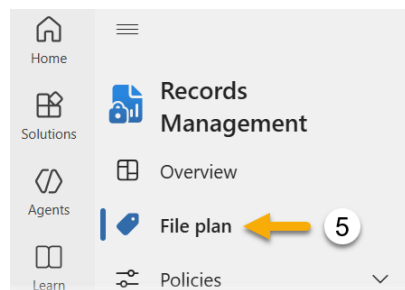
1 - Configure a retention label in Purview

Step by step

1. Navigate to Microsoft Purview using this link: <https://purview.microsoft.com/>
2. Sign in as an account that:
 - a. Has one of the associated licenses or add-on licenses shown above
 - b. Has sufficient rights to create label in Purview
3. In Microsoft Purview, in the left navigation select **Solutions**
4. From the *Solutions* menu select **Records Management**



5. From the *Records Management* menu select **File Plan**



6. In the ribbon menu, select + **Create a label** or + in a collapsed menu

File plan

Take advantage of a more flexible and comprehensive way to manage your business data. Our file plan lets you apply item-level retention settings to your content management plan, define whatever label settings you need, and view detailed label analytics, and more. [Learn about using a file plan](#)

+ Create a label 6 Publish labels ↑ Import ↓ Export ↻ Refresh

<input type="checkbox"/>	Name ▾	Status ▾	Based on ▾
<input type="checkbox"/>	Standard 7 year policy	Inactive	Label applied
<input type="checkbox"/>	25 year long term	Inactive	Last modified

File plan

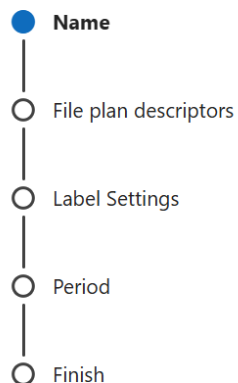
Take advantage of a more flexible and comprehensive way to manage your business data. Our file plan lets you apply item-level retention settings to your content management plan, define whatever label settings you need, and view detailed label analytics, and more. [Learn about using a file plan](#)

+ 6 ↑ ↓ ↻ 2 items 🔍

<input type="checkbox"/>	Name ▾	Status ▾
<input type="checkbox"/>	Standard 7 year policy	Inactive
<input type="checkbox"/>	25 year long term	Inactive

- You will enter a wizard for creating a retention label that consists of 5 sections, starting with your name and descriptions, consider a name for the retention label and descriptions for end users and for administrators

Create retention label



Name your retention label

This is the name of the label your users will see in the apps where it's published (like Outlook, SharePoint, and OneDrive). So be sure to come up with a name that helps them understand what it's used for.

Name *

Immutable Record

Description for users

Content classified with this retention label is immutable and cannot be edited or deleted.

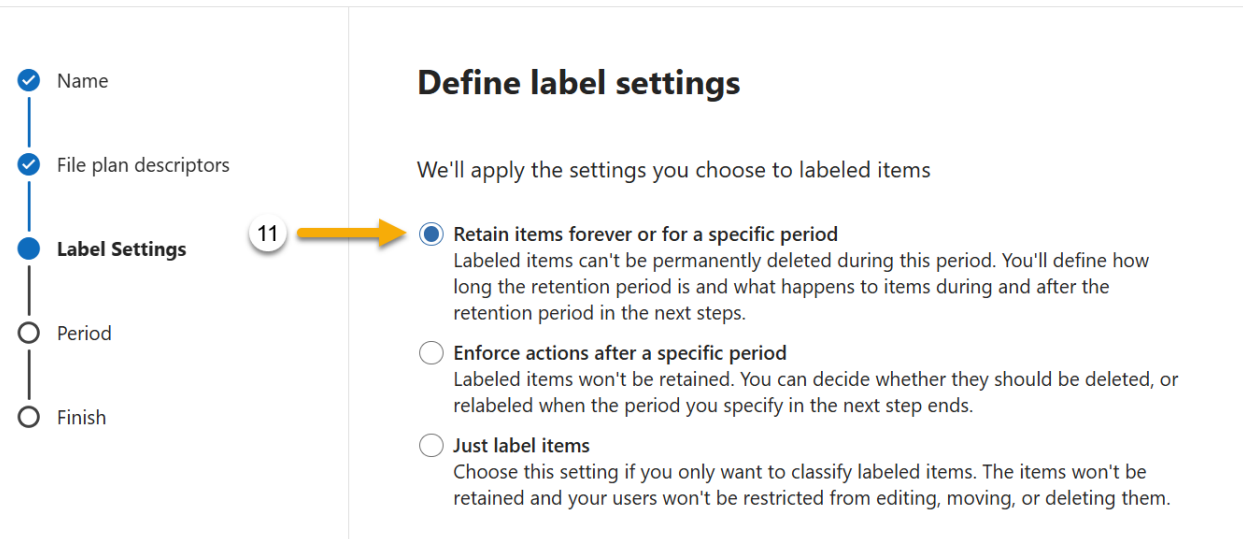
Description for admins

This label is used for the automated declaration of immutable records and file stubs through AvePoint Opus.

- Click **Next**
- For your *File plan descriptors*, you can choose to add additional values to organize the label in your file plan (note that you can proceed without adding any values)
- Click **Next**

11. For your label settings choose **Retain items forever or for a specific period**

Create retention label



Define label settings

We'll apply the settings you choose to labeled items

- Retain items forever or for a specific period**
Labeled items can't be permanently deleted during this period. You'll define how long the retention period is and what happens to items during and after the retention period in the next steps.
- Enforce actions after a specific period**
Labeled items won't be retained. You can decide whether they should be deleted, or relabeled when the period you specify in the next step ends.
- Just label items**
Choose this setting if you only want to classify labeled items. The items won't be retained and your users won't be restricted from editing, moving, or deleting them.

12. Click **Next**

13. Set the *Retain items for* value to **Forever**

Define the retention period

Specify how long the retention period should be.

Retain items for

Forever   

14. Click **Next**

15. For *During the retention period* select **Mark items as record**

16. Ensure that *Unlock this record by default* is not selected

During the retention period

- Retain items even if users delete
Users will be able to edit items and change or remove the label. If they delete items, we'll keep copies in a secure location. [Learn more](#)
- Mark items as a record** ← 15
Users won't be able to edit or delete items, and only admins will be able to change or remove the label. For SharePoint or OneDrive files, actions are blocked or allowed based on whether the item's record status is locked or unlocked. [Learn more about records](#)
- Unlock this record by default** ← 16
Choose this option if you want to allow users to edit items before locking the record. Users won't be able to move items across OneDrive accounts or SharePoint document libraries while the record is unlocked.

MISSING OPTIONS?



*If you cannot see the option **Mark item as a record** you will need administrative support.*

This feature requires the execution of a PowerShell command for it to become visible in Purview. Please coordinate with an administrator who has appropriate access to run PowerShell against Exchange Online. The following Microsoft article outlines the necessary steps:

<https://learn.microsoft.com/en-us/purview/declare-records>

17. Click **Next**

18. Lastly click **Create label**

19. Click **Done**, by default *Publish this label to Microsoft 365 locations* is selected, this will allow you to make the retention label available in your chosen workspaces

20. On the publication wizard, you can choose to:

- Click **Next** if you only have a single label to publish
- If you have multiple labels, select your retention label first and click **Next**

21. Optionally add Admin units, noting that this may affect your scope, click **Next** to continue
22. When configuring scopes, you can choose to set up an adaptive policy that will use site attributes to maintain a dynamic list of workspaces for example, new sites can be added to the policy automatically, or you can choose as static policy, which will require you to manually select sites and maintain the list if sites change over time



Make a selection of either **Adaptive** or **Static** based on your organizations preference and click Next to continue to configure the scopes further

Choose the type of retention policy to create

Locations can be specified dynamically with an adaptive scope using attributes or properties, or if you know the specific target locations, you can select them individually from a list. An advantage of using an adaptive scope to determine target locations is that it will automatically update where it's applied based on the attributes or properties you define.

- Adaptive**
After selecting adaptive policy scopes, which consist of attributes or properties (e.g. 'Department' or 'Site URL') that define the users, groups, or sites in your org, you'll choose supported locations containing the content you want to retain. The policy will automatically update to match the criteria defined in the scopes.
- Static**
You'll choose locations containing the content you want to retain. If locations change after this policy is created (for example if a SharePoint site is added or removed), you'll need to manually update the policy.

23. Ensure your scope includes all sites and workspaces containing In-Place records – Opus will be unable to migrate In-Place Records to a retention label if that site or workspace is not included in this policy

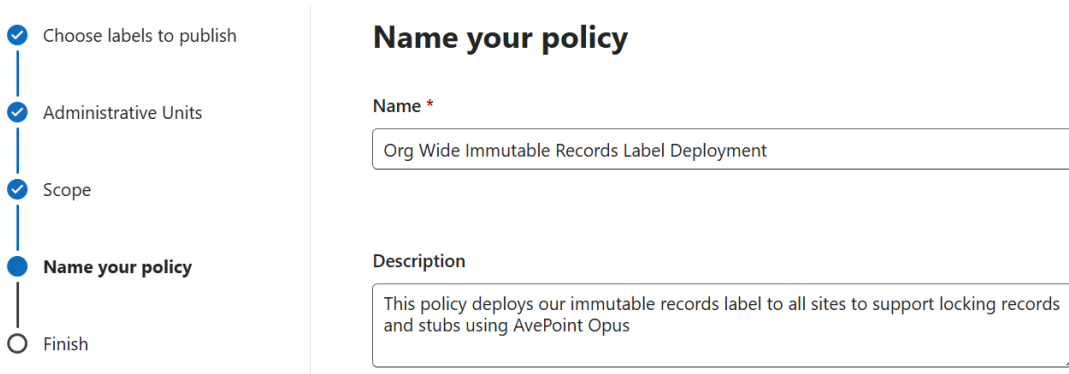
Status	Location	Included	Excluded
<input type="checkbox"/> Off	 Exchange mailboxes		
<input checked="" type="checkbox"/> On	 SharePoint classic and communication sites	All sites Edit	None Edit

TIP: You may choose to manage both *SharePoint classic and communication sites* and *Microsoft 365 Group*

mailboxes & sites in the same policy

24. Click **Next**

25. Name your policy, optionally add a description and click **Next**



Choose labels to publish

Administrative Units

Scope

Name your policy

Finish

Name your policy

Name *

Org Wide Immutable Records Label Deployment

Description

This policy deploys our immutable records label to all sites to support locking records and stubs using AvePoint Opus

26. Select **Submit** noting that you may need to wait up to a week for Microsoft Purview to deploy the label

Finish

△ Most labels will become available to your users within a week. Labels will appear in Outlook and Outlook on the web only for mailboxes that have at least 10 MB of data.

27. Click **Done**

28. You will be returned to the *File plan* page in *Records Management*

29. Lastly, make a note of the name of the retention label you created, which should appear in the file plan list

File plan

Take advantage of a more flexible and comprehensive way to manage your business-critical data. Our file plan lets you apply item-level retention settings, import or export templates of your content management plan, define whatever label settings meet your needs, review detailed label analytics, and more. [Learn about using a file plan](#)

<input type="checkbox"/>	Name	Status	Based on	Is re...
<input type="checkbox"/>	Standard 7 year policy	Inactive	Label applied	Yes
<input type="checkbox"/>	25 year long term	Inactive	Last modified	No
<input type="checkbox"/>	Immutable Record	Active	When created	Yes

TIP: To review the status of the policy publication, within Purview you can select **Records Management > Label policies** and look for the **Status** column. If the status is listed as *Enabled* you can proceed to the next steps in AvePoint Opus.

<input type="checkbox"/>	Name	Status	Type
<input type="checkbox"/>	Org Wide Immutable Records Label Dep...	Enabled	Publish

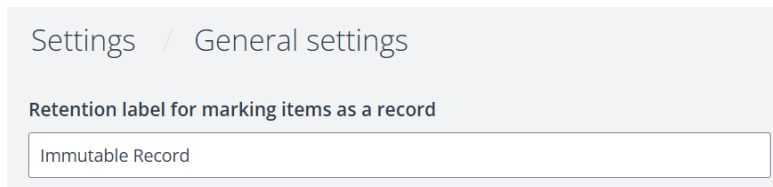
2 - Set up a migration job in Opus

Step by Step

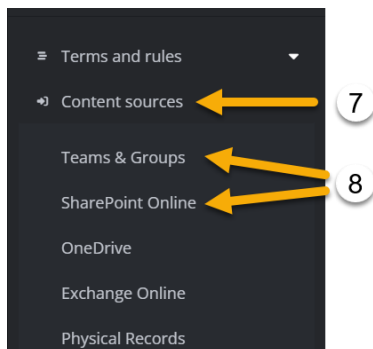
1. Navigate to: [AvePoint Online Services](#)
2. On the *My services* page select **All services** then select **Opus**

3. In the left navigation, select **Settings**

4. Select **General Settings**
5. For the setting *Retention label for marking items as a record* enter the name of the retention label you want to use to mark items as records



6. Click **Save**
7. In the left navigation, expand **Content sources**, next you'll need to consider where your current in-place records are
8. If your target location are SharePoint sites, choose **SharePoint Online** otherwise select **Terms & Groups**



TIP: You can always re-run a separate job for another location if you have a mix of in-place records across workspaces

9. The migration job can only be performed against a container (the highest level in the content source tree), select a container from your registered sites/objects

Content source tree

Information lifecycle Storage optimization

Search by container name or site collection URL

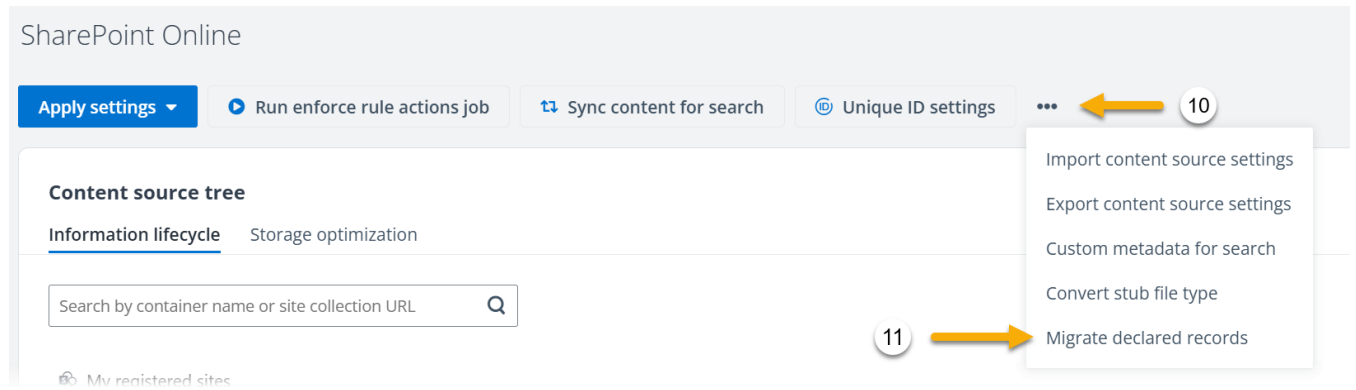


My registered sites

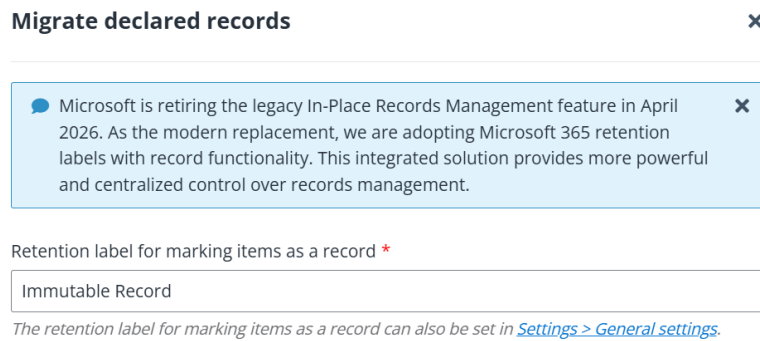
-  [Functional SharePoint Sites](#)
-  [https://\[redacted\]sharepoint.com](#)
-  [https://\[redacted\]sharepoint.com/sites/Health](#)
-  [https://\[redacted\]sharepoint.com/sites/HealthPages](#)
-  [https://\[redacted\]sharepoint.com/sites/Health/cont](#)

10. Click on the **More (...)** button

11. Select **Migrate declared records**



12. The *Migrate declared records* pane will open, check that the label is correct



13. Click **Migrate**

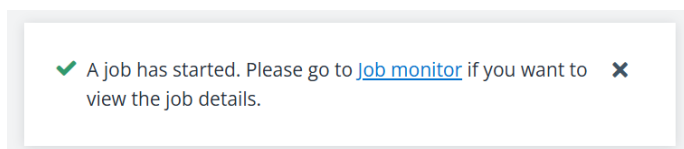
14. On the *Confirm* dialog please read the notice before clicking **OK** to proceed or **Cancel** to return to the *Migrate declared records* pane

Confirm

You are about to migrate the existing declared records within the selected scope. This action will remove the legacy "in-place record" status and then apply the configured retention label with record functionality to maintain documents/items' official record status. Note that this action is irreversible. Please verify your scope and retention label configuration before proceeding.



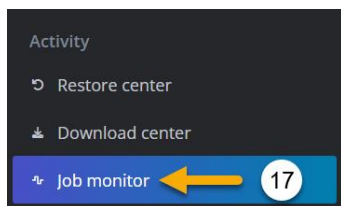
15. When *OK* is selected a job will be started



16. You can leave the job running, or optionally you can proceed to step 17 to monitor the job

OPTIONAL – Monitoring the migrate declared records job

17. You can monitor the job by selecting **Job monitor** in the left navigation



18. The *Migrate declared records* job will show its progress, once complete it will show a *Status* of Finished, you can click on the **Job ID** number to see more details about the migration

Job monitor Job queue

Input keyword

Download settings Refresh

<input type="checkbox"/>	Job ID	Job type	Progress	Status
<input type="checkbox"/>	DRM20260330115811315175	Migrate declared records	<div style="width: 30%;"></div> 3/100	In progress
<input type="checkbox"/>	UF20260330063643313567	Unique ID settings full job	<div style="width: 100%;"></div> 100/100	Finished

19. The job duration will vary depending on the number of sites/objects in the container

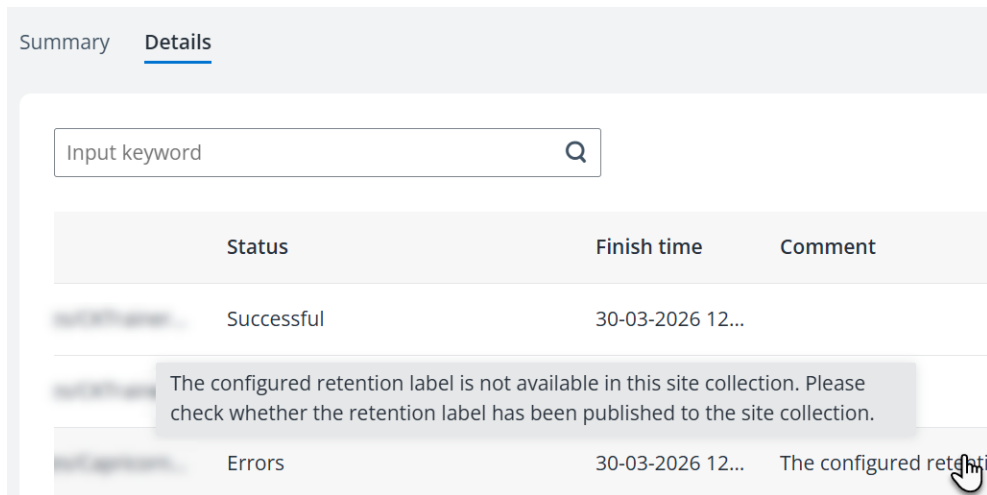
20. If the job finishes with exceptions as referred to in step 18 you can use the **Job ID** to review the job details

Download settings Refresh 0 of 65 selected

<input type="checkbox"/>	Job ID	Job type	Progress	Status
<input type="checkbox"/>	DRM20260330115811315175	Migrate declared records	<div style="width: 100%;"></div> 100/100	Finished with exception

21. Select the **Details** tab

22. Position your mouse over the error message to view the details



23. In the scenario above, our retention (records) label was not published to one of our site collections due to the scope of the policy, this can be resolved in Purview if the site is outside of your scope OR you may need to allow more time for Purview to publish your policy to all sites in scope

24. In the event of an exception, once resolved simply run through steps 7 to 20 to rerun the job

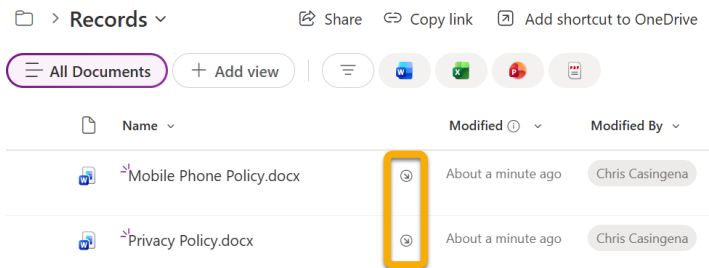
25. Lastly proceed to run the Migrate declared records job against other containers within your content sources

For additional assistance, please refer to the summary of this document for details on how to contact AvePoint support.

3 - Reviewing the migration

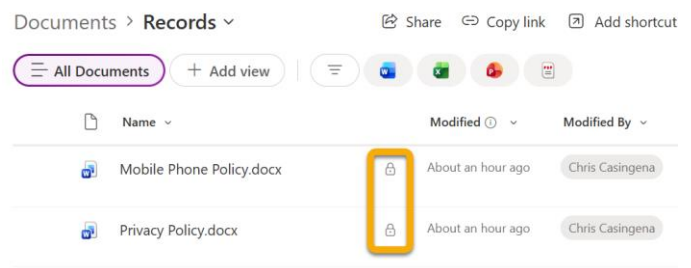
To review the results, please navigate to a workspace containing in-place records. In the image below you will see the before and after, for two files that were formerly in-place records.

Before declared migration job – files are in-place records



Files that are declared as in-place records appear as checked out, if you position your mouse cursor over the checked out icon, you will be advised the file is checked out to the system administrator.

After declared migration job – files are managed by a retention label



Files that are marked as a record using a retention label will display a padlock icon, replacing the checked out icon for in-place records.

You can ensure the in-place records status has been removed by reviewing a documents compliance details by **right-clicking** on a file, select **More** then **Compliance details**. Reviewing the compliance details of the files we will see that before the migration, the file is managed as an in-place record.

Compliance details



Use this dialog to determine what retention stage an item is in. You can also take action to keep this item in compliance with organizational policy.

Retention Stages			
Event	Action	Recurrence	Scheduled occurrence date
This item is not subject to a retention policy			
Name	Privacy Policy.docx		
Content Type	Document		
Folder Path	Shared Documents/Records		
Exemption Status	Not Exempt You cannot exempt/unexempt item from policy.		
Hold Status	Not on hold You cannot add/remove item from hold.		
In Place Records Management Status	<div style="border: 2px solid orange; padding: 2px;"> Declared an in place record on 3/29/2026 Undeclare in place record </div>		
Label Status	None		

Close

After the migration the documents are not listed as in-place records, and are no longer managed by the feature deprecated by Microsoft.

Compliance details



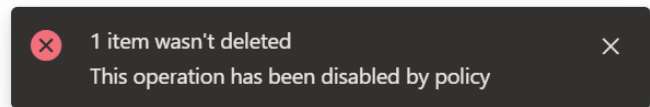
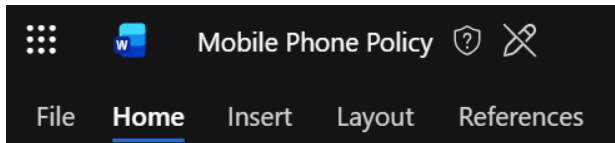
Use this dialog to determine what retention stage an item is in. You can also take action to keep this item in compliance with organizational policy.

Retention Stages			
Event	Action	Recurrence	Scheduled occurrence date
This item is not subject to a retention policy			
Name	Mobile Phone Policy.docx		
Content Type	Document		
Folder Path	Shared Documents/Records		
Exemption Status	Not Exempt You cannot exempt/unexempt item from policy.		
Hold Status	Not on hold You cannot add/remove item from hold.		
In Place Records Management Status	<div style="border: 2px solid orange; padding: 2px;"> Not an in place record Declare as an in place record </div>		
Label Status	Immutable Record		

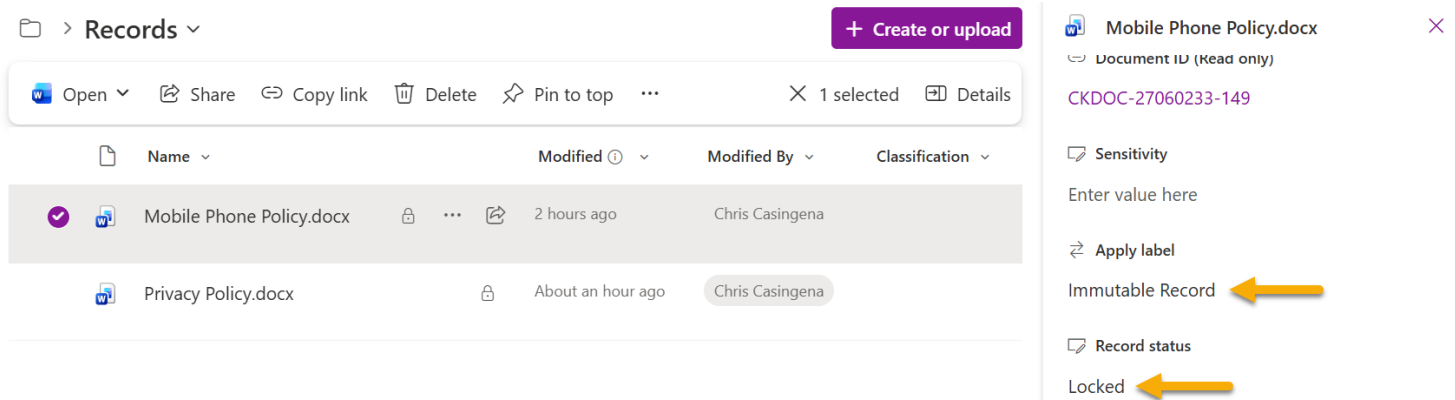
Close

When managing document marked as a record by a retention label, you will notice that actions like editing and deletion are restricted in a similar way to the classic in-place records feature.

File is locked in a view only state with no edit options File is unable to be deleted



To review the label or record status applied to a file, in SharePoint or Teams simply **right-click** on a file and select **Details** to see the documents metadata, and review the *Apply label* and *Record status* fields to see the retention label applied.



Summary

We hope this guide has helped clarify the migration process from in-place records to retention label management supported through AvePoint Opus. By following these steps, you can ensure your organization's documents remain secure and compliant with the latest Microsoft standards. Remember, Opus has been updated to allow you to use your retention label for managing records as part of your rules to manage files and stubs moving forward. Thank you for taking the time to learn about these updates.

For additional assistance or questions regarding this migration process, please contact: web_support_ticket@avepoint.com.