

Data Retention Policy in Box – Important Notes

Retention Basics

- Retention ensures content does not get deleted accidentally or intentionally, until the content is out of the retention period.
- The retention policy starts when files are added or uploaded to a Box folder with a retention policy applied.
- If you remove the custom metadata that is carrying a retention policy from a folder or file, the file is still governed by the initial retention policy.

Time Period Precedence

- If you update the custom metadata on a file to a new metadata value with a different retention length, the longer Time Period value takes precedence over the shorter one.
 - If you change the Time Period from one finite value to another finite value (e.g. 3 years to 5 years), the file will be retained based on the upload date of the file to Box.
 - If you change the Time Period from indefinite to a finite value, the file will be retained based on the date the Time Period was updated.

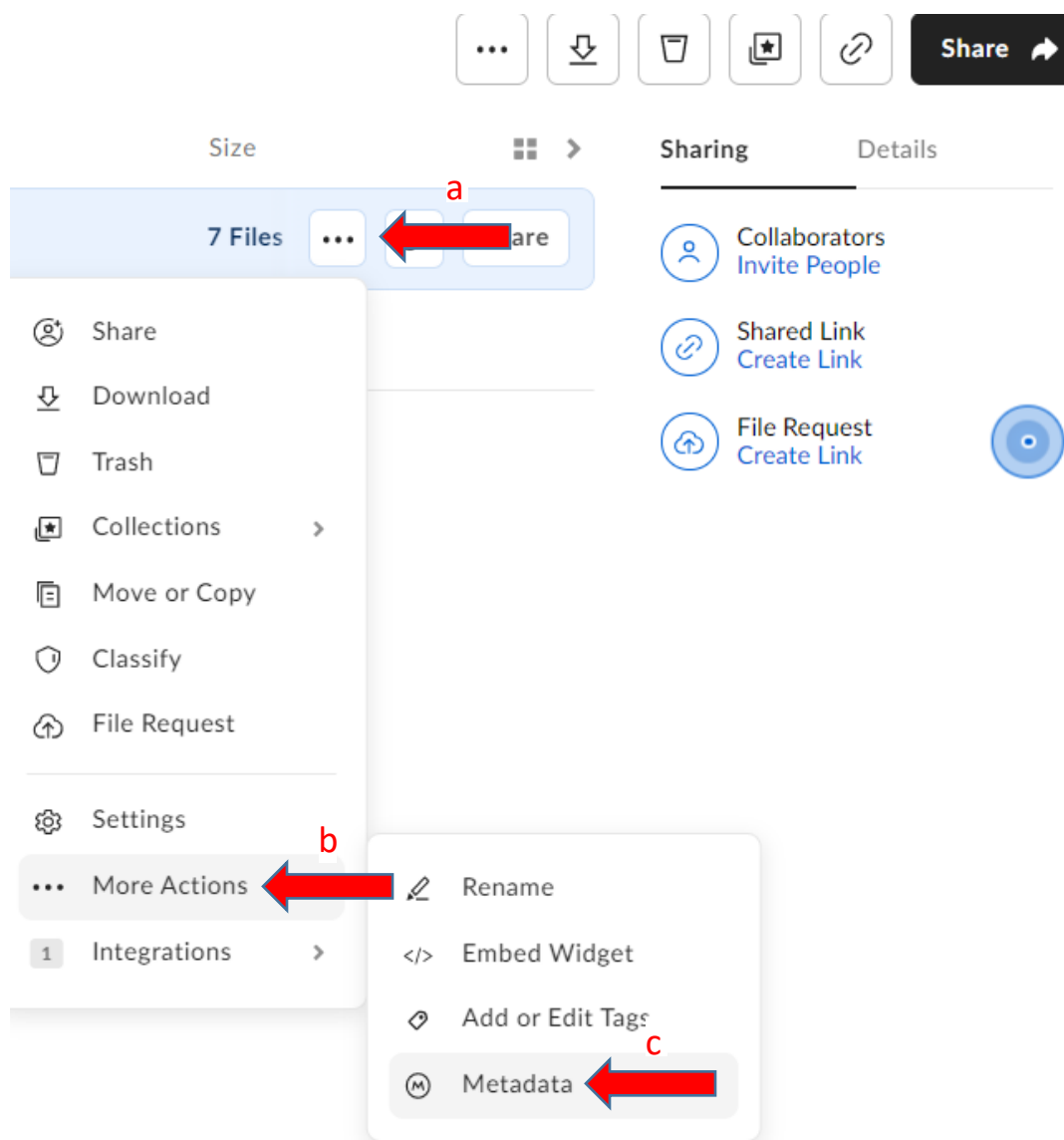
Moving and Deleting

- You cannot transfer a file or folder with a retention policy outside of the enterprise. You also cannot change the folder owner to an external party or move an individual file to a folder owned by an external user.
- Files that are under retention cannot be removed from your Box environment, however, they can be moved to other folders and to the Trash. If a file under an active retention policy is sent to the trash, it remains in the trash until its retention period is met, then abides by the Trash Auto-Delete settings (90 days).

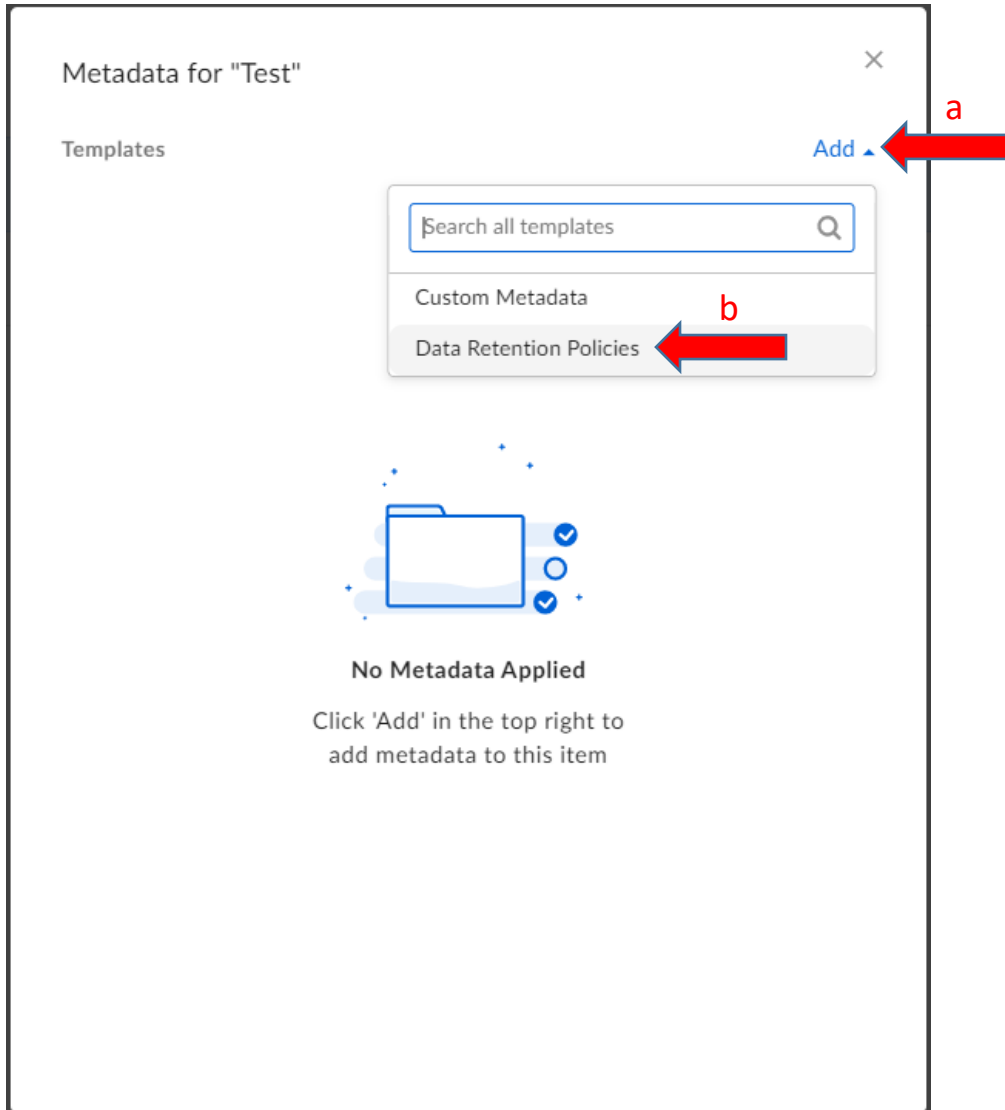
[Box Data Retention Information](#) – Box's in-depth information about Data Retention.

Data Retention Policy – How to add retention policy to Box folder

1. Login to box.uada.edu to add a Data Retention Policy.
2. Locate the folder that needs the Data Retention Policy
 - a. Click the Elipses (...) for the folder
 - b. Hover over “More Actions”
 - c. Click “Metadata”



3. In the pop-up window
 - a. Click "Add"
 - b. Click "Data Retention Policies"



4. In the pop-up window
 - a. Click “Edit Metadata” (pencil icon)
 - b. Recommended/Optional: Toggle on “Enable Cascade Policy”
 - c. Optional: Select to Skip or Overwrite existing template values.
 - d. Select the Data Retention Policy from the drop-down menu. 3 year, 5 year, 7 year or Indefinite.
 - e. Click “Save”

The screenshot shows a pop-up window titled "Metadata for 'Test'" with a close button (X) in the top right corner. Below the title is a "Templates" section with an "Add" button. A template named "Data Retention Policies" is selected. To the right of the template name is a pencil icon labeled 'a'. Below this is a section for "Enable Cascade Policy" with a toggle switch labeled 'b'. The text below the toggle says "Apply template and its values to all new and existing items in this folder and its subfolders. [Learn more](#)". Below this is a section for conflict resolution with a warning icon and the text "This operation is not immediate and may take some time." It contains two radio button options: "Skip and keep all existing template values" labeled 'c' and "Overwrite all existing template values". Below the radio buttons is a "Data Retention Policy" section with a dropdown menu labeled 'd' showing "Select Value". At the bottom are three buttons: "Remove", "Cancel", and "Save" labeled 'e'.

5. Optional: Verify, Modify, or Remove Data Retention Policies
 - a. Repeat steps 2a, 2b, and 2c to open the Metadata pop-up to verify, modify, or remove the Data Retention Policy.

