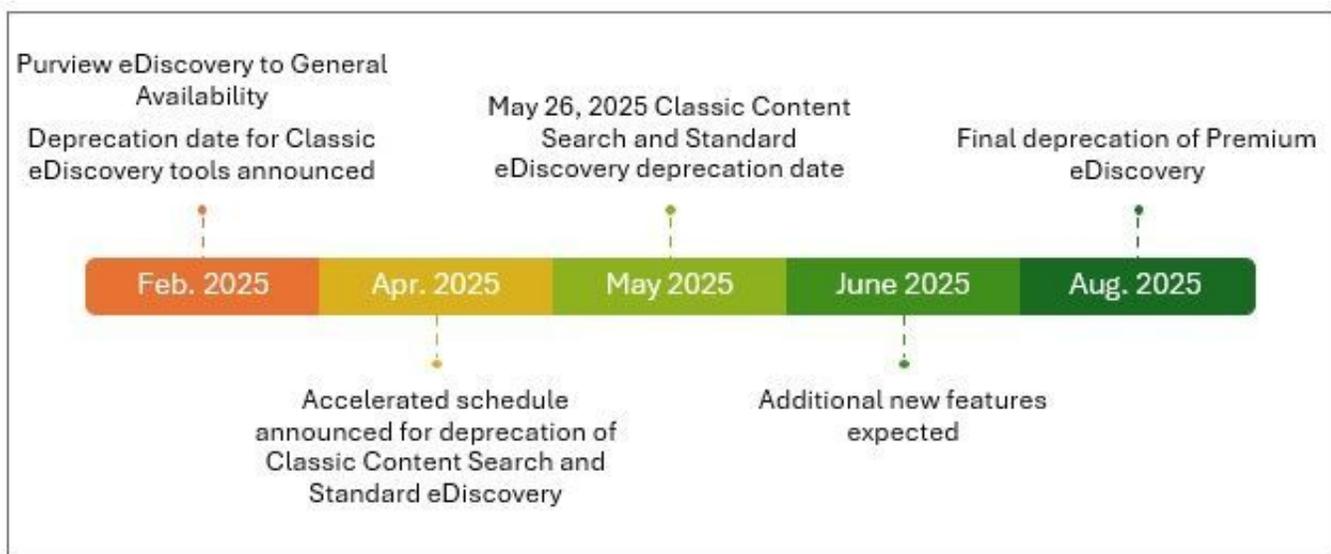# Microsoft 365 eDiscovery Updates

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eMerge recently hosted a webinar exploring the latest changes to Microsoft 365 Purview's eDiscovery solution. Our panel of attorneys and technologists examined the nature of these updates and discussed the preparatory steps organizations using Microsoft 365 should consider implementing now. View the webinar recording.

Timeline of Changes

In February 2025, Microsoft released its new unified eDiscovery experience (Purview eDiscovery) within the Purview portal. Microsoft describes Purview eDiscovery as "a modernized user interface for key eDiscovery workflows, with simplified creation for cases, searches, and holds." With a single, centralized platform, Purview eDiscovery sets the stage for long-anticipated features like the eDiscovery Hold Report and the Review Set Query Report and allows for increased insight into eDiscovery task metrics for long-running processes. Instead of locking into a single set of features within Standard (E3) or Premium (E5) eDiscovery, organization administrators can now choose the eDiscovery options that best meet the needs of their individual case.

Purview eDiscovery is a centralized, unified eDiscovery experience, allowing organizations to take advantage of basic and premium features from the same "Case."

In tandem with the rollout of Purview eDiscovery, Microsoft initially announced that its longstanding eDiscovery tools (Content Search, Standard eDiscovery, and Premium eDiscovery) would all be deprecated in August 2025.

Then, on April 14, Microsoft revised the retirement date of classic Content Search and Standard eDiscovery to May 26, 2025. *See Microsoft Purview | Retiring Classic Content Search, Classic eDiscovery (Standard) Cases, Export PowerShell Parameters* (MC1055528). If you do not have access to your organization's Microsoft 365 Message center, consider engaging with your IT team to receive updates or following one or both of these aggregator sites:

- Microsoft 365 Message Center Archive
- Unofficial Microsoft Changelog

Microsoft provided more detail in its Upcoming changes to Microsoft Purview eDiscovery Security Community Blog post dated April 16, 2025. According to this post, several PowerShell cmdlet parameters related to Export automation in Standard eDiscovery were also deprecated in May 2025.

As of this writing, the deprecation date for Premium eDiscovery remains August 2025.

Key Changes

As Purview eDiscovery is a fully rearchitected product, eDiscovery administrators should expect significant feature and functionality changes, especially in these key areas:

- **Holds**, including new processes to add custodial and non-custodial data sources

- **Search**, including screen layout changes and additional search conditions

- **Export**, including major changes to export settings and formatting options

Through the updated **Hold Policy** screen, eDiscovery Managers and Administrators can create preservation holds. Custodial data sources, including Exchange mailboxes and OneDrive locations, are auto detected by searching for or selecting the custodian's name. Related custodians or locations can be quickly added. Collaborative locations like SharePoint and Teams can also be added to preservation hold policies.

Each hold policy can include all identified data sources or can be filtered using keywords and other criteria.

The **Search** interface is fully redesigned with expanded search condition options including natural language searching if properly licensed. Committing content to a Review Set includes additional options related to versioning and hyperlink file management.

Purview eDiscovery unifies the **Export** experience whether the export is initiated from a Review Set or Search results. The Export options panel includes many new options that should be tested to ensure the resulting output meets the needs of your matter, including:

- Organizing contextual chat messages into an HTML transcript (with or without committing data to a Review Set)
- Customizable options for SharePoint/OneDrive version inclusion
- Simpler export formatting options

Messages and related items from mailboxes and Exchange online

☐ Include Teams and Viva Engage conversations

Collect up to 12 hours of related conversations when a message matches a search

☑ Organize conversations into HTML transcript

Contextual chat messages will be threaded into HTML transcript for ease of review and handling

☑ Access links (cloud attachments) in messages

Collect items from links to SharePoint or OneDrive

ⓘ Including cloud attachments will increase the size and quantity of your exported results.

ⓘ If you have version as shared feature enabled, this will retrieve the version of the document when it was shared. Learn more about version as shared

Latest version only ⌄

Export type

Select what you'd like to export. Learn more about export types

◯ Export items report only

◉ Export items with items report

Export format

Select how you'd like to format your export. Learn more about export formats

◉ Create PSTs for messages

◯ Create .msg files for messages

The following settings control whether the output package contains split based on location of the item, whether to include folder structure and naming convention to follow.

☑ Organize data from different locations into separate folders or PSTs

☑ Include folder and path of the source

☑ Condense paths to fit within 259 characters

Truncate subfolder or file name to ensure path length fits under the threshold

☑ Give each item a friendly name

Use Email subject and SharePoint file name as item name in export