

Introduction:

As organizations generate ever-increasing volumes of digital information, they must adopt rigorous policies to govern content and records. Microsoft SharePoint Online, within the Microsoft 365 suite, offers a centralized platform for enforcing retention, classification, and disposal rules. This course teaches information governance leaders and electronic records managers how to develop and apply comprehensive content and records policies in SharePoint Online. Participants will learn to automate lifecycle actions, maintain compliance, and ensure consistent governance throughout their cloud collaboration environment.

Intended Audience:

This training is ideal for professionals charged with policy design, enforcement, and oversight in SharePoint Online, including:

- Records managers responsible for retention and disposition rules
 - Information governance officers setting enterprise-wide policies
 - SharePoint administrators configuring site-level controls
 - Information technology staff supporting Microsoft 365 compliance settings
 - Document control specialists establishing classification systems
 - Compliance officers auditing data integrity and access
 - Data privacy officers aligning policies with legal requirements
 - Internal auditors validating policy application
 - Digital transformation managers integrating governance into business processes
 - Knowledge managers overseeing corporate content strategies
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Learning Objectives:

By the end of this program, participants will be able to:

- Explain the SharePoint Online content architecture, including site collections and document libraries
- Assess organizational needs to define content types and metadata models
- Create and apply retention labels and auto-labeling policies using the Microsoft Purview compliance portal
- Set up boundary controls and permissions for sites and hubs to enforce policy scope
- Distinguish between SharePoint Online governance tools and those in the broader Microsoft 365

compliance center

- Automate document lifecycle events—such as retention and deletion—through built-in settings and workflows
- Monitor policy adherence via audit logs, compliance scores, and usage insights
- Validate policy effectiveness through test cases and live environment trials
- Maintain consistent classification by configuring content types and library templates
- Optimize the user experience while preserving security and compliance
- Map policies to legal and regulatory obligations and evaluate risk exposure
- Collaborate with business units to roll out governance measures and training materials
- Develop dashboards and reports to communicate compliance metrics to stakeholders
- Adapt governance frameworks to evolving business or regulatory requirements

Key Competencies Developed:

Participants will gain expertise in:

- Architecting SharePoint Online sites and taxonomies for governance
- Configuring Microsoft Purview tools for retention and sensitivity labeling
- Designing sustainable retention schedules and disposal workflows
- Identifying and closing governance gaps in content structures
- Implementing lifecycle automation with metadata tagging and Power Automate
- Aligning policy deployment with organizational objectives
- Training and guiding teams on policy compliance best practices
- Auditing and refining governance models based on performance data
- Documenting governance procedures and standard operating practices

Course Modules:

Module 1: SharePoint Online Foundations for Governance

- Overview of SharePoint Online within the Microsoft 365 ecosystem
- Understanding site collections, hubs, and document libraries
- Role of content types, site columns, and metadata in policy enforcement
- Navigating the SharePoint administration center

- Differences between classic and modern SharePoint experiences
- Introduction to the Microsoft Purview compliance portal
- Limits and capacities relevant to governance

Module 2: Designing Content Types and Metadata Taxonomies

- Creating custom content types linked to site columns
- Building reusable metadata taxonomies and term sets
- Aligning business requirements with metadata models
- Applying default metadata templates in libraries
- Best practices for naming conventions and metadata consistency
- Mapping metadata to retention labels and compliance rules
- Leveraging Microsoft Search for metadata-driven discovery

Module 3: Implementing Records Management Policies

- Differentiating records from non-records in a digital context
- Creating retention and sensitivity labels in the compliance portal
- Applying labels automatically across sites and libraries
- Configuring manual versus automatic record declaration
- Designing disposition review workflows for record deletion
- Integrating retention labels with content types for consistent governance
- Using compliance insights to audit policy enforcement
- Examining case studies of successful policy deployments

Module 4: Monitoring Compliance and Managing Risk

- Establishing policies across SharePoint Online and OneDrive for Business
- Implementing data loss prevention rules for sensitive content
- Reviewing audit logs and setting up alert policies
- Reporting on policy compliance and identifying gaps
- Using activity explorer and compliance score for risk assessment
- Coordinating legal holds and electronic discovery requirements
- Mapping organizational compliance frameworks to SharePoint capabilities

Module 5: Best Practices for Policy Lifecycle Management

- Designing centralized versus federated governance models

- Forming a content governance committee and defining roles
 - Aligning governance policies with business strategies and processes
 - Communicating policies and training end users on compliance
 - Scheduling policy reviews and change-control procedures
 - Developing standard operating procedures and governance documentation
 - Automating governance tasks with Power Automate flows
 - Evaluating policy impact through business metrics and continual improvement
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Final Insights & Key Takeaways:

Establishing and enforcing content and records policies in SharePoint Online requires a clear governance framework, strategic use of built-in compliance tools, and ongoing monitoring. This course provides the methodology and hands-on experience to implement sustainable, organization-wide governance that safeguards information, reduces risk, and supports digital transformation. Participants will leave equipped to lead policy initiatives that deliver security, accountability, and operational excellence.