

Introduction:

As organizations embrace digital transformation, they require intelligent systems to handle their electronic records. Microsoft SharePoint Online offers a robust solution for centralizing, securing, and governing documents. This training program teaches professionals how to lead electronic records initiatives by applying proven practices for classification, retention, and compliant disposal of content stored in SharePoint Online. Through hands-on exercises, participants will learn to automate content lifecycles, set up retention policies with Microsoft Purview, and build governance frameworks that align with corporate and regulatory requirements.

Targeted Participants:

This program is designed for individuals tasked with managing digital content and ensuring compliance, including:

- Records managers responsible for electronic filing systems
 - Information governance officers overseeing policy enforcement
 - SharePoint administrators configuring enterprise sites
 - Document control specialists establishing structured libraries
 - Information technology staff implementing lifecycle rules
 - Archivists preserving digital archives
 - Compliance officers managing regulatory obligations
 - Project managers integrating records management into workflows
 - Business analysts optimizing content processes
 - Data managers supporting long-term preservation strategies
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Course Objectives:

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

- Interpret key legal and regulatory requirements for electronic records
- Define roles and responsibilities for records management in SharePoint
- Evaluate SharePoint Online's features for content governance
- Design metadata strategies that improve search and classification
- Apply retention labels and disposal policies effectively

- Configure document libraries with appropriate content types and labels
- Build automated workflows to streamline recordkeeping tasks
- Ensure documents remain secure, discoverable, and audit-ready
- Use audit logs and lifecycle reports to monitor compliance
- Translate organizational policies into actionable SharePoint configurations
- Integrate Microsoft Purview to manage retention and legal holds
- Manage permissions and versioning for strict access control
- Create content organizer rules for intelligent document routing
- Identify and remediate risks and compliance gaps in content processes
- Collaborate across departments to maintain governance and defensible disposition

Key Competencies Developed:

Participants will gain proficiency in:

- Implementing compliant electronic records management systems
- Configuring SharePoint for secure content handling
- Automating metadata assignment and classification
- Enforcing governance rules and retention labeling
- Interpreting audit logs and scheduling retention events
- Leveraging SharePoint features to oversee content lifecycles
- Understanding legal requirements for record retention and disposal
- Assessing and closing compliance gaps in document management

Course Content:

Unit 1: Foundations of Electronic Records Management

- Defining electronic content and records
- Reviewing legal, regulatory, and organizational mandates
- Exploring professional roles in records management
- Examining standards such as International Organization for Standardization 15489 and Department of Defense 5015.2
- Mapping the digital records lifecycle

- Understanding defensible disposition and audit readiness
- Identifying risks from poor content management
- Introducing SharePoint Online as an enterprise governance platform

Unit 2: SharePoint Online Architecture for Records Management

- Navigating SharePoint Online interfaces and site collections
- Defining content types, metadata fields, and managed properties
- Configuring document libraries by record category
- Establishing permission hierarchies across sites and hubs
- Implementing document sets, version control, and check-in/check-out
- Automating document routing with content organizer rules
- Creating custom views and filters using metadata
- Integrating lists for enhanced classification

Unit 3: Compliance and Retention Strategies

- Applying retention labels and policies via Microsoft Purview
- Declaring records and categorizing by regulatory requirements
- Designing file plans and retention schedules
- Implementing disposition review workflows
- Ensuring final record immutability and security
- Automating retention events and triggers
- Reviewing document histories and label applications
- Managing preservation holds and legal holds
- Monitoring compliance metrics on data lifecycle dashboards

Unit 4: Automation and Lifecycle Governance

- Creating Power Automate flows for lifecycle events
- Automating approvals, notifications, and record routing
- Integrating SharePoint with Teams and Outlook for seamless collaboration
- Building lifecycle dashboards with Power BI
- Scheduling content reviews and archival tasks
- Setting up expiration alerts for documents
- Leveraging Microsoft Syntex for AI-driven classification
- Applying data loss prevention policies to protect sensitive content

Unit 5: Governance, Monitoring, and Best Practices

- Establishing enterprise-wide governance policies
 - Forming a records management oversight committee
 - Monitoring site usage, access, and permissions
 - Reviewing audit logs and activity reports regularly
 - Maintaining a taxonomy for consistent searchability
 - Periodically updating retention and labeling rules
 - Training end users on record creation, classification, and protection
 - Conducting internal audits and reporting compliance findings
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Final Insights:

Effective electronic records management in SharePoint Online ensures that organizational content remains secure, easily discoverable, and defensible in audits. This course empowers professionals with the technical and strategic skills to implement best practices, drive compliance, and support an enterprise content strategy that delivers scalability, accountability, and operational excellence.