Business Intelligence & Data · BI29

Implementation of Modern Record Management through SharePoint and Office 365

Geneva · 14 - 18 Dec 2026

Date	Venue	Duration
14 - 18 Dec 2026	**Geneva**	**1 Week**
Fee	Ref	Language
£5,250 GBP	**BI29**	**English**

Introduction

Managing information and records, which are now one of the company's most valuable assets, represents a challenge in the modern world of digitalisation, where companies are becoming digital enterprises and the data managed has to be renamed data lakes and even data oceans.

Because most businesses use Microsoft Office programs, the logical solution for document management will be to continue using SharePoint. People in businesses should be well prepared for the challenges that this will bring.

Delivering information management solutions on SharePoint can be difficult due to the Microsoft product's extensive feature set. Delegates will learn how to combine information management knowledge and apply it to SharePoint in ways that make it easy to use today and adaptable to future needs in this training course. This training course is ideal for any company that needs to build information management solutions on SharePoint or use the SharePoint product family.

This training course will highlight the elements, principles, and implementation paths for modern information management challenges that necessitate the adaptability of solutions to the realm of Big Data and the changing regulatory specter.

This training course will highlight:

- Enterprise Content Management (ECM) strategy in the modern world
- Records management as a business enabler for the enterprise
- Automation of common records management tasks and records capture
- Efficient management of records through the whole records lifecycle
- Enable and use eDiscovery
- Appropriate and inappropriate scenarios for SharePoint use
- Use SharePoint to design content import strategies

- Use of SharePoint components to create an effective user experience
- The proper way to select and configure SharePoint information protection tools

Course Objectives of Implementation of Modern Record Management through SharePoint and Office 365

The delegates will be able to:

- Create information and documentation procedures and requirements in SharePoint
- Understand Information Management in SharePoint and Office 365
- Recognise Effective Information Architecture for SharePoint and Office 365
- Acquire the knowledge on how to manage email
- Understand the relationship between records management and the cloud
- Apply Privacy and data protection rules in SharePoint
- Recognise the way to implement decommissioning of legacy systems and user information
- Prepare Business and functional requirements for a digital record-keeping solution

Course Methodology of Implementation of Modern Record Management through SharePoint and Office 365

- Hands-on training rather than theoretic learning (examples based on real-life cases)
- Interactive training, using the video materials, and examples of ECM success stories
- The delegates will also go through the lab exercises with SharePoint and Office 365
- The delegates will be presented with real-life cases and implementation issues, as well as the best-case scenarios implemented in different industries

Organisational Impact of Implementation of Modern Record Management through SharePoint and Office 365

The organisation will acquire structured and effective methods to implement ECM solutions, satisfy stakeholders and legal requirements, as well as manage to cut costs and improve their organisation workflow through the proper application of ECM solutions, which enable them to comply with the requirements of the modern days and implement these solutions through SharePoint and Office 365.

This is achieved through:

- Training of the workforce to adopt an effective and concise method for retaining information
- Adopt information management through the use of SharePoint and Office 365
- Reveal the benefits of adopting a modern approach to records management
- Understand Metadata, its uses, and sources
- How to efficiently collect and apply metadata to digital records through SharePoint and Office 365
- Use SharePoint to ensure the authenticity of digital records for eDiscovery

Personal Impact of Implementation of Modern Record Management through SharePoint and Office 365

The personal impacts for all participants are to gain a deep and solid understanding and practical experience in the application and operation of ECM

systems trough:

- Learn how to organise the documents and information management in their company
- Develop a clear metadata creation process in SharePoint and Office 365
- Learn the steps of capturing content in SharePoint
- Learn how to protect the data, implement eDiscovery and ensure security
- Learn how to eliminate the personal data and comply with GDPR, with the SharePoint auditing tool
- Use modern solutions like built-in SharePoint capabilities to improve collaborative processes

Target Audience of Implementation of Modern Record Management through SharePoint and Office 365

This is a training course for all involved in data analysis, presentation, and graphic design, but will be especially beneficial for:

- Document Controllers
- Secretaries
- Administrators
- People Supporting Management and/or Working in Project Teams
- Marketing Specialist
- Project Managers
- Public Relations Specialists
- Marketing Managers
- Campaign Managers
- Business Development Managers

Course Outlines of Implementation of Modern Record Management through SharePoint and Office 365

DAY 1

Records Management as a Business Enabler

- Enterprise Content Management through the Record Life Cycle
- Record Capture
  - Digital Records
  - Paper Records
- Record Retention and Disposition
- Records Management and the Cloud

DAY 2

Records and Document Management in SharePoint and Office 365

- SharePoint Online Architecture
- Configuring SharePoint
- Site Administration
- Search Settings in SharePoint

DAY 3

Office 365

- Office 365 and the Client Device
- Office 365 Supportability
- The architecture of OneDrive for Business
- Change Management in Office 365
- Data Protection in Office 365

DAY 4

Content Migration to SharePoint

- Migration Phases
  - Requirements (Discovery)
  - Preliminary Design (Content Inventory)
  - Final Design
  - Test Phase
  - Go Live Phase
- Migration Scenarios

DAY 5

Managing Governance, Security, and Compliance with SharePoint

- Service Assurance with SharePoint
- Managing Permissions in SharePoint
- Designing User Experience with SharePoint
- Select and Configure Information Protection Tools with SharePoint
- E-Discovery Requests Compliance in SharePoint
- GDPR and other Audit Tools for SharePoint

Register or ask about this course online

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