MERCURY

Electronic Content & Records Management Best Practices in SharePoint Online (SPO)

15 – 19 March 2027
London (UK)



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Introduction:

The digital transformation of organizations requires a shift from traditional content storage to intelligent electronic records management systems. SharePoint Online SPO provides a powerful platform for secure, centralized document management. This Electronic Content and Records Management Best Practices in SharePoint Online SPO course helps professionals lead electronic records initiatives by applying best practices aligned with compliance and regulatory standards.

Participants will learn how to efficiently create, manage, classify, retain, and dispose of records within SharePoint Online. The Electronic Content and Records Management Best Practices in SharePoint Online SPO program ensures that learners develop the skills to build and implement governance frameworks that support enterprise content strategies.

This Electronic Content and Records Management Best Practices in SharePoint Online SPO training course provides hands-on experience in automating content lifecycles and applying retention labels using Microsoft Purview. Learners will be able to confidently manage content while maintaining compliance and audit readiness.

Targeted Groups:

This Electronic Content and Records Management Best Practices in SharePoint Online SPO training targets professionals seeking specialized knowledge and skills:

- Records managers working in digital document environments.
- Information governance officers oversee compliance initiatives.
- SharePoint administrators manage enterprise content.
- Document control specialists need structured systems.
- IT professionals implement document lifecycle policies.
- Archivists are responsible for preserving digital records.
- Compliance officers handle regulatory requirements.
- Project managers integrate ECM into workflows.
- Business analysts optimize content efficiency.
- Data managers support long-term retention strategies.

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Course Objectives:

Participants will achieve the following objectives by completing the Electronic Content and Records Management Best Practices in SharePoint Online SPO course:

- Understand key compliance requirements for electronic records.
- Identify the roles and responsibilities of electronic records leads.
- Evaluate SharePoint Online's capabilities for content governance.
- Develop design metadata strategies for enhanced search and classification.
- Apply retention and disposition policies effectively.
- Configure document libraries using content types and labels.
- Build automated workflows to streamline recordkeeping.
- Ensure records are secure, discoverable, and compliant.
- Conduct audits and track lifecycle activities using SPO tools to ensure seamless operations.
- Translate organizational policies into actionable SharePoint solutions.
- Integrate Microsoft Purview compliance center features.
- Implement permission management and version controls.
- Customize content organizer rules for smart routing.
- Analyze risks and compliance gaps in the content lifecycle.
- Collaborate across departments to maintain governance.
- Ensure legal hold and defensible disposition capabilities.

Targeted Competencies:

Participants will gain the following competencies during the Electronic Content and Records Management Best Practices in SharePoint Online SPO program:

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- Ability to implement compliant records management systems.
- Skill in configuring SharePoint for secure document handling.
- Proficiency in automating metadata and classification processes.
- Confidence in applying governance rules and labels.
- Understanding of audit logs and retention scheduling.
- Mastery of SharePoint features for content oversight.
- Knowledge of legal and regulatory retention requirements.
- Capacity to assess and close compliance gaps.

Course Content:

Unit 1: Foundations of Electronic Content & Records Management:

- Define electronic content and records in the context of digital environments.
- Explore legal, regulatory, and organizational requirements.
- Understand the roles of records managers and electronic content leads.
- Discuss standards such as ISO 15489 and DoD 5015.2.
- Review the lifecycle of digital records in modern organizations.
- Identify the principles of defensible disposition and audit-readiness.
- Assess the impact of poor content management on compliance.
- Examine common challenges in the digital transformation of records.
- Introduce SharePoint Online as a content governance platform.

Unit 2: SharePoint Online Architecture for Records Management:

- Navigate the SharePoint Online interface and libraries.
- Define content types, metadata fields, and managed properties.
- Set up document libraries for specific record categories.
- Understand site collections, hubs, and permissions hierarchy.
- Configure document sets for structured records.
- Enable versioning and check-in/check-out protocols.
- Use content organizer rules for document routing.
- Set up custom views and filters using metadata.
- Integrate SharePoint lists for metadata-driven classification.

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Unit 3: Compliance and Retention Strategies in SharePoint Online:

- Apply retention labels and policies using Microsoft Purview.
- Define record declarations and regulatory categories.
- Manage file plans and retention schedules.
- Implement disposition review processes.
- Ensure secure record finalization and immutability.
- Use retention event triggers to automate timelines.
- Audit document history and label application.
- Understand preservation hold, libraries, and legal hold.
- Monitor compliance scores and data lifecycle dashboards.

Unit 4: Automation and Lifecycle Governance:

- Create Power Automate flows for document lifecycle events.
- Automate record routing, approvals, and notifications.
- Use workflows to support content creation and retention.
- Build lifecycle dashboards using Power BI for insights.
- Link SharePoint with Teams and Outlook for seamless integration.
- Schedule content reviews and archival triggers.
- Customize expiration alerts for at-risk documents.
- Enable AI-based content classification using Microsoft Syntex.
- Secure sensitive records using Data Loss Prevention DLP.

Unit 5: Governance, Monitoring, and Best Practices:

- Establish content governance policies across departments.
- Set up a records management governance committee.
- Consistently monitor access, usage, and permissions to ensure optimal security and control.
- Review audit logs and activity reports.
- Align SharePoint with organizational compliance strategies.
- Maintain a taxonomy for enterprise-wide searchability.
- Periodically review retention and labeling policies.
- Train users on record creation, classification, and protection.
- Conduct internal audits and report findings regularly.

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Final Insights & Key Takeaways:

Effective electronic records management in SharePoint Online supports regulatory compliance and information integrity. Mastering SPO tools and governance frameworks ensures organizational content remains secure, searchable, and auditable. This Electronic Content and Records Management Best Practices in SharePoint Online SPO course empowers professionals to become records leaders with both technical and strategic capabilities. Adoption of best practices ensures scalability, accountability, and operational excellence.