MERCURY

Managing Content & Records Management Policies in SharePoint Online (SPO)

12 – 16 July 2027
Washington DC (USA)



Dubai - UAE: +971 4 450 5697
Istanbul - Türkiye: +90 539 599 1206
Amman - Jordan: +962 79 712 3347

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Ref: 16153_1008551 **Date:** 12 – 16 July 2027 **Location:** Washington DC (USA) **Fees:** 8300 Euro

Introduction to Managing Content & Records Management in SharePoint Online SPO:

Effective content and records management are cornerstones of modern digital governance. With the rapid growth of data in cloud-based environments, organizations face increasing pressure to maintain regulatory compliance, minimize risks, and optimize operational efficiency. This Managing Content and Records Management Policies in SharePoint Online SPO course equips electronic records leads and information governance professionals with the knowledge to establish and manage robust content and records policies using Microsoft 365 and SharePoint Online SPO.

Participants will explore advanced strategies for automated retention labeling, content lifecycle management, compliance controls, and governance across collaborative environments. This Managing Content and Records Management Policies in SharePoint Online SPO program will emphasize the consistent application of policy, transparency, and the secure handling of digital records. It addresses challenges in decentralized content creation and the integration of information architecture. Participants will be able to enforce organization-wide content and records governance in SPO with confidence and precision.

Targeted Groups:

This Managing Content and Records Management Policies in SharePoint Online SPO training targets professionals seeking specialized knowledge and skills:

- Records Managers oversee compliance in cloud systems.
- Information Governance Officers are responsible for policy enforcement.
- SharePoint Administrators manage content lifecycle workflows.
- IT Professionals supporting Microsoft 365 retention settings.
- Document Controllers are optimizing records classification and access.
- Compliance Officers ensure data integrity and audit readiness.
- Data Privacy Officers are integrating content policies with compliance laws.
- Internal Auditors validating content lifecycle and retention accuracy.
- Digital Transformation Managers aligning governance with business needs.
- Knowledge Managers handle corporate documentation strategy.

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Course Objectives:

Participants will achieve the following objectives by completing the Managing Content and Records Management Policies in SharePoint Online SPO course:

- Understand the structure of SharePoint Online's content architecture.
- Analyze organizational needs for records classification and retention.
- Design metadata-driven content types and site columns.
- Apply retention labels using Microsoft Purview and auto-labeling policies.
- Configure compliance boundaries across SharePoint Online sites.
- Differentiate between SharePoint and Microsoft 365 compliance center capabilities.
- Implement lifecycle automation using retention and deletion settings to manage data effectively.
- Monitor records policies through audit logs and insights.
- Validate policy impact using test scenarios and live environments to ensure effective implementation.
- Enforce consistent classification through content types and document libraries.
- Optimize user experience while maintaining content security.
- Align policy implementation with legal and regulatory standards.
- Assess the risk posture based on policy enforcement gaps.
- Evaluate the effectiveness of current governance models.
- Collaborate across departments to ensure adherence to policies.
- Create documentation and training materials to ensure end-user compliance.
- Adapt strategies for evolving business or legal requirements.
- Utilize dashboards to report compliance metrics to stakeholders.

Targeted Competencies:

Participants will gain the following competencies during the Managing Content and Records Management Policies in SharePoint Online SPO program:

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- Mastery of SharePoint Online content architecture and taxonomy.
- Proficiency in configuring Microsoft 365 Compliance Center tools.
- Ability to design retention schedules and governance workflows.
- Competence in identifying risks in unmanaged content structures.
- Knowledge of lifecycle automation and metadata tagging.
- Skills in aligning content governance with organizational goals.
- Capability to train teams on policy compliance best practices.
- Experience in auditing and evaluating policy effectiveness.
- Confidence in developing sustainable content governance models.

Course Content:

Unit 1: Foundations of SharePoint Online for Content Management:

- Introduction to SharePoint Online and the Microsoft 365 ecosystem.
- Key elements include site collections, hubs, and document libraries.
- Understanding site structures and content architecture.
- Role of content types, site columns, and metadata.
- Differentiating modern vs classic SharePoint experiences.
- Navigating SharePoint Admin Center for site governance.
- Introduction to document management best practices.
- Overview of SharePoint Online limits and capacities.
- Introduction to Microsoft Purview Compliance Portal.

Unit 2: Designing Content Types and Metadata for Governance:

- Creating and managing custom content types.
- Linking site columns to content classification.
- Establishing reusable metadata taxonomies.
- Aligning business requirements with metadata models.
- Implementing default metadata templates in libraries.
- Using managed metadata service and term sets.
- Best practices for naming conventions and metadata usage.
- Mapping metadata to retention and compliance labels.
- Integrating metadata with Microsoft Search functionality.

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Unit 3: Implementing Records Management Policies in SharePoint Online:

- Defining records vs non-records in a digital context.
- Overview of Microsoft Purview Retention and Sensitivity Labels.
- Creating retention labels and label policies.
- Applying auto-labeling policies across SharePoint sites.
- Configuring Record Declaration: Manual vs. Automatic Declaration.
- Understanding disposition review and content deletion workflows.
- Combining retention labels with content types.
- Auditing policy enforcement with compliance insights.
- Case studies on real-world content policy deployments.

Unit 4: Managing Compliance, Risk, and Policy Monitoring:

- Role of the Compliance Center in Microsoft 365 governance.
- Establishing policies for SharePoint and OneDrive together.
- Creating DLP Data Loss Prevention policies for SPO content.
- Managing audit logs and alert policies for sensitive data.
- Reporting on retention policy enforcement and gaps.
- Using activity explorer and compliance score.
- Mapping compliance obligations to document storage.
- Coordinating with legal holds and eDiscovery requirements.
- Evaluating SPO against industry and internal compliance frameworks.

Unit 5: Best Practices for Content Governance and Policy Lifecycle:

- Defining governance models: centralized vs federated.
- Creating a content governance committee structure.
- Aligning SPO records policies with business strategy.
- Enabling communication and training for end users.
- Designing content review schedules and governance cycles.
- Managing change control in policy deployment.
- Developing governance documentation and SOPs.
- Integrating Power Automate to support governance workflows.
- Evaluating policy effectiveness with business impact assessments.

Final Insights & Key Takeaways:

Implementing records and content management in SharePoint Online requires a structured approach, effective governance, and expertise. This Managing Content and Records Management Policies in SharePoint Online SPO course provides a framework for designing and enforcing compliant policies across the Microsoft 365 environment. Through real-world applications, professionals will learn to streamline content lifecycle processes. Empowered with strategic insights, they will ensure secure and sustainable digital records governance.