MERCURY

Integrating Physical Records with SharePoint Online SPO

31 May – 4 June 2027
Nairobi (Kenya)



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Integrating Physical Records with SharePoint Online SPO

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Introduction:

In today's hybrid information landscape, organizations must efficiently manage both physical and digital records. The Integrating Physical Records with SharePoint Online SPO course provides professionals with the tools and techniques to bridge the gap between paper-based archives and SharePoint Online.

By focusing on practical integration strategies, the Integrating Physical Records with SharePoint Online SPO program empowers records managers to implement scalable and sustainable hybrid systems. Participants will learn to classify, index, and manage physical files within the digital environment of SPO while ensuring compliance and traceability. They will explore how metadata and retention policies apply to physical assets.

With a strong focus on governance and lifecycle management, learners will build seamless workflows that link physical and digital records. The Integrating Physical Records with SharePoint Online SPO training ensures information is secure, accessible, and effectively managed throughout its lifecycle.

Targeted Groups:

The Integrating Physical Records with SharePoint Online SPO training targets professionals seeking specialized knowledge and skills:

- Records Managers handle physical and digital documentation.
- SharePoint Administrators are responsible for records architecture.
- Document Controllers manage physical archives in enterprise systems.
- Information Governance Officers ensure regulatory compliance.
- Digital Transformation Officers are modernizing records strategies.
- Archivists are involved in hybrid document management systems.
- IT Support Teams manage SharePoint Online metadata and access.
- Compliance Officers monitor records retention and audit trails.
- Business Analysts are improving operational efficiency in data management.
- Department Heads are seeking integration between legacy and modern systems.

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Course Objectives:

Participants will achieve the following objectives by Integrating Physical Records with SPO completion:

- Understand the lifecycle of physical records in hybrid systems.
- Identify best practices for indexing and storing physical records in SPO.
- Analyze and map metadata uniformly across physical and digital records.
- Design a file classification structure for hybrid recordkeeping.
- Apply retention policies that govern both physical and digital records.
- Implement workflows that streamline hybrid records processes.
- Evaluate integration tools and connectors suitable for SharePoint Online SPO.
- Monitor compliance and access control for physical records in SPO.
- Compare traditional versus digital asset lifecycle management.
- Configure SharePoint to support physical records repositories.
- Solve real-world problems using SPO record management functions.
- Assess security protocols to protect sensitive physical records and documents.
- Collaborate across departments for centralized records governance.
- Create seamless audit trails for hybrid records compliance.
- Optimize retrieval and search functionality for physical documents in SharePoint Online SPO.

Targeted Competencies:

Participants will gain the following competencies during the Integrating Physical Records with SharePoint Online SPO program:

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- Master the fundamentals of physical record management.
- Develop integration skills for hybrid SharePoint systems.
- Apply metadata principles to physical files in SharePoint Online SPO.
- Implement retention and disposal strategies.
- Navigate compliance standards for hybrid records.
- Automate classification and indexing workflows.
- Use SharePoint tools to manage the physical records lifecycle.
- Optimize records access and retrieval functions.
- Apply governance rules for hybrid records control.
- Strengthen audit and traceability capabilities.

Course Content:

Unit 1: Fundamentals of Physical Records in a Digital Era:

- Define physical records and their relevance in digital ecosystems.
- Explore the legal, operational, and historical value of physical documents.
- Compare digital transformation vs. physical archiving strategies.
- Identify common issues with manual records management.
- Understand metadata mapping for non-digital records.
- Learn about physical records cataloging methods.
- Discuss role-based access for paper-based content.
- Introduce the concept of a hybrid records management system.
- Examine integration challenges in modern organizations.

Unit 2: SharePoint Online SPO Capabilities for Records Integration:

- Overview of SharePoint Online as a document management platform.
- Discover SPO features for integrating physical records.
- Configure custom content types for physical files.
- Design libraries that mimic physical record repositories.
- Use metadata columns to simulate indexing cards.
- Automate physical document check-in and check-out procedures.
- Manage permission levels for physical asset access.
- Leverage SharePoint lists to track physical asset locations.
- Establish version control policies for associated files.

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Unit 3: Building Hybrid Record Systems with SharePoint Online:

- Identify hybrid record system structures and configurations.
- Develop taxonomies suitable for both digital and physical files.
- Map retention schedules across formats.
- Track physical file movements using SPO dashboards.
- Design workflows that include manual record handling steps.
- Use Power Automate to trigger alerts for physical records actions.
- Integrate barcode systems for SPO record indexing.
- Build search functionality for hybrid file retrieval.
- Implement SharePoint-integrated inventory management for records.

Unit 4: Compliance, Governance, and Risk Management:

- Understand regulatory frameworks affecting physical records.
- Align hybrid recordkeeping practices with ISO 15489 and GDPR.
- Apply SharePoint's compliance center to track physical assets.
- Establish audit logs for physical records within SPO.
- Monitor lifecycle events e.g., check-out, destruction digitally.
- Manage risk through access logs and security tagging.
- Explore third-party compliance tools compatible with SPO.
- Implement consistent classification across business units.
- Develop escalation workflows for missing physical records.

Unit 5: Best Practices for Implementing and Sustaining Hybrid Records Systems:

- Conduct readiness assessments before implementation.
- Develop a roadmap for records integration with SharePoint Online.
- Train end-users in handling physical records within digital platforms.
- Create cross-functional teams to oversee records governance.
- Establish physical-to-digital transition policies.
- Monitor performance using records lifecycle metrics.
- Update integration models based on changing organizational needs.
- Encourage feedback loops for continuous improvement.
- Document integration strategies for audit and succession purposes.

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Final Insights & Key Takeaways:

The Integrating Physical Records with SharePoint Online SPO course enables professionals to merge physical and digital records into a unified governance framework. Participants walk away with the tools, strategies, and practical skills to manage physical records efficiently using SharePoint Online.

The Integrating Physical Records with SharePoint Online SPO training promotes enhanced compliance, faster access, and more structured workflows for all records. Mastering hybrid record systems is essential for any organization navigating the demands of digital transformation.