MERCURY

E-Discovery & Information Retrieval Techniques in SharePoint Online (SPO)

31 October – 4 November 2027
Muscat (Oman)



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Introduction:

Modern organizations increasingly rely on digital platforms for storing documents, facilitating collaboration, and exchanging data. SharePoint Online SPO, as part of Microsoft 365, is one of the most widely adopted cloud-based collaboration environments. This E-Discovery and Information Retrieval Techniques in SharePoint Online SPO course is for professionals responsible for managing electronic records and ensuring compliance during legal and audit procedures.

The E-Discovery and Information Retrieval Techniques in SharePoint Online SPO training course explores how to utilize SPO's advanced search capabilities and e-discovery tools to efficiently locate, preserve, and manage digital content. It also covers the integration of information governance policies within SPO to reduce risk exposure.

Participants will learn how to optimize their search queries, set up e-discovery cases, and accurately manage compliance requests. Ultimately, this E-Discovery and Information Retrieval Techniques in SharePoint Online SPO program ensures that legal discovery and auditing processes are conducted securely and systematically in a cloud-first environment.

Targeted Groups:

This E-Discovery and Information Retrieval Techniques in SharePoint Online SPO training targets professionals seeking specialized knowledge and skills:

- Electronic Records Managers in Digital Transformation Environments.
- Compliance Officers handle regulatory and audit inquiries.
- Legal IT Support Teams supporting e-discovery initiatives.
- SharePoint Administrators are responsible for securing data retrieval.
- Information Governance Officers manage corporate content.
- Legal Counsel and In-House Legal Teams.
- Document Control Specialists in regulated industries.
- Risk and Internal Audit Professionals working in cloud platforms.
- Data Protection Officers DPOs focused on cloud-based records.
- Public Sector professionals involved in FOIA or compliance audits.

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Course Objectives:

Participants will achieve the following objectives by completing the E-Discovery and Information Retrieval Techniques in SharePoint Online SPO course:

- Understand core concepts of e-discovery within Microsoft 365 and SharePoint Online.
- Apply advanced search syntax and query tools to retrieve specific content.
- Configure and manage e-discovery cases for legal holds and compliance.
- Evaluate metadata properties to enhance filtering and document relevance.
- Design policies that align e-discovery practices with compliance frameworks.
- Interpret audit logs and efficiently trace content access activity.
- Demonstrate how to preserve content using Legal Hold and Compliance Center.
- Classify sensitive information and manage retention labels properly.
- Implement workflows that support internal investigations and audits to ensure compliance and transparency.
- Generate export packages for legal teams using SharePoint's export options.
- Measure the effectiveness of retrieval processes using available metrics.
- Collaborate securely across departments while maintaining data integrity and confidentiality.
- Troubleshoot permission and visibility issues during search and case setup.

Targeted Competencies:

Participants will gain the following competencies during the E-Discovery and Information Retrieval Techniques in SharePoint Online SPO program:

- Mastery of SharePoint Online search and query techniques.
- Proficiency in configuring and managing e-discovery cases.
- Skill in identifying and preserving legally relevant content.
- Capability to set up compliance and retention policies.
- Knowledge of metadata-driven content classification.
- Competence in audit tracking and data access analysis.
- Ability to collaborate with legal and compliance departments effectively.
- Understanding of role-based access control during investigations.

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Course Content:

Unit 1: Fundamentals of E-Discovery in SharePoint Online:

- Define the role of e-discovery in a modern enterprise content environment.
- Understand the Microsoft Purview Compliance Portal structure.
- Explore the compliance ecosystem of Microsoft 365 and SharePoint Online.
- Learn the types of data sources supported in SPO e-discovery.
- Identify key legal and audit use cases relevant to SharePoint.
- Introduce content search vs e-discovery case scenarios.
- Understand the Legal Hold mechanism and its implications.
- Review how cloud architecture impacts record preservation.
- Learn how SPO integrates with Compliance Center features.

Unit 2: Advanced Search Techniques for Information Retrieval:

- Use keyword queries and Boolean logic for precise content search.
- Apply KQL Keyword Query Language to filter documents by metadata.
- Utilize date filters, user filters, and document types effectively to enhance your workflow.
- Understand result source configurations and refiners.
- Build reusable query templates for recurring searches.
- Explore eDiscovery search statistics and search logs.
- Troubleshoot common search limitations and inaccuracies.
- Customize property-based searches for enterprise use.
- Identify data sprawl and manage distributed content locations.

Unit 3: Managing E-Discovery Cases in SharePoint Online:

- Create and configure e-discovery cases in the Microsoft Purview portal.
- Add custodians and content locations to discovery sets.
- Apply and manage legal holds to protect content from deletion.
- Perform preview and export operations on discovered content.
- Define and enforce security permissions for case handling to ensure secure access and control.
- Document and track e-discovery procedures for audit readiness.
- Learn to export search results in a legally defensible format.
- Manage multi-user collaboration within e-discovery teams.
- Understand limitations and licensing implications for advanced features.

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Unit 4: Legal Compliance, Retention, and Information Governance:

- Establish retention policies using Microsoft Purview Compliance Center.
- Define and manage sensitivity labels to classify information.
- Configure content types and site policies for compliance alignment.
- Audit access logs and activity records for legal reporting.
- Review policies on the Freedom of Information Act FOIA and GDPR alignment.
- Monitor and control content lifecycle through retention schedules.
- Align organizational content governance policies with Microsoft 365 capabilities to ensure seamless integration.
- Integrate audit trails into compliance dashboards and reports to enhance visibility and accountability.
- Mitigate risks through the timely detection of non-compliant activities.

Unit 5: Real-World Scenarios and Best Practices:

- Simulate internal investigations using realistic e-discovery scenarios.
- Perform role-based assessments for access and search configuration.
- Analyze high-risk content exposure using advanced search patterns to identify potential issues.
- Respond to legal requests with full export documentation.
- Evaluate the cost and time efficiency of SPO search tools.
- Compare manual vs automated content classification strategies.
- Identify gaps in current governance frameworks and remedy them.
- Create playbooks for effective collaboration between legal and compliance teams.
- Conduct mock audits to validate preparedness and system readiness.

Final Insights & Key Takeaways:

This E-Discovery and Information Retrieval Techniques in SharePoint Online SPO course equips participants with the technical and legal knowledge to confidently manage discovery processes in SharePoint Online. Learners will be able to support legal, compliance, and audit departments with effective tools and frameworks that enhance their operations. Through hands-on learning and advanced search capabilities, participants will streamline the discovery lifecycle. Ultimately, professionals will gain confidence in managing digital evidence in a legally defensible, compliant, and secure manner.