MERCURY

Content Search & Retrieval Optimization in SharePoint Online (SPO)

15 – 19 March 2027
Paris (France)



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Ref: 16147_1085469 **Date:** 15 – 19 March 2027 **Location:** Paris (France) **Fees:** 6900 Euro

Introduction:

In today's digital workplace, rapid and accurate access to information is critical for productivity and informed decision-making. SharePoint Online SPO, as a core component of Microsoft 365, offers robust tools for content management and search optimization. However, to truly leverage these capabilities, organizations must implement strategic taxonomy and metadata structures aligned with Enterprise Content Management ECM standards.

This Content Search and Retrieval Optimization in SharePoint Online SPO course focuses on optimizing content search and retrieval processes in SPO by leveraging taxonomy managers and best practices for metadata management. It guides professionals on how to improve user experience, reduce time-to-information, and streamline digital knowledge discovery. Learners will create sustainable information architectures tailored to business needs. Participants will confidently structure content in SPO for maximum search efficiency and usability.

Targeted Groups:

This Content Search and Retrieval Optimization in SharePoint Online SPO training targets professionals seeking specialized knowledge and skills:

- SharePoint administrators aim to improve platform usability.
- ECM managers are responsible for information governance.
- IT professionals handling Microsoft 365 content systems.
- Document controllers require better file retrieval frameworks.
- Records management professionals seeking content classification insights.
- Knowledge managers are developing content discovery strategies.
- Information architects build scalable metadata taxonomies.
- Compliance officers ensure regulatory document access.
- Project managers work with large document repositories.
- Team leaders streamlining digital collaboration tools.

Targeted Competencies:

Participants will gain the following competencies during the Content Search & Retrieval Optimization in SharePoint Online SPO program:

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- Design efficient metadata structures for SharePoint libraries to optimize data management.
- Implement taxonomies aligned with ECM frameworks.
- Improve search performance through schema customization.
- Apply practical knowledge in configuring SharePoint term stores.
- Develop scalable and sustainable content organization systems.
- Enhance collaboration through better information retrieval.
- Conduct regular audits to ensure metadata completeness and accuracy.
- Translate business needs into effective search configurations.
- Manage content lifecycle through retention policies and metadata.
- Facilitate enterprise-wide knowledge sharing.

Course Objectives:

Participants will achieve the following objectives by completing the Content Search and Retrieval Optimization in SharePoint Online SPO course:

- Understand the core principles of ECM within SharePoint Online.
- Identify the role of taxonomy in improving enterprise search.
- Learn to define and apply content types and metadata columns.
- Build structured metadata models that align with organizational needs.
- Configure term stores and manage term sets for classification accuracy.
- Evaluate and enhance SharePoint search schema performance to improve the overall search experience.
- Analyze content findability issues and apply corrective measures.
- Design a user-centric information architecture for intuitive navigation.
- Apply best practices for content tagging, versioning, and lifecycle control.
- Use SharePoint tools to monitor and refine search effectiveness.
- Promote metadata adoption across teams through effective governance and management.
- Facilitate compliance with data retention and classification policies.
- Optimize content retrieval for both internal users and external stakeholders.
- Enhance operational efficiency by reducing the time spent searching.
- Support business continuity by ensuring consistent accessibility of content.

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Course Content:

Unit 1: Foundations of SharePoint Online and ECM Integration:

- Introduction to SharePoint Online as a content management platform.
- Overview of Enterprise Content Management ECM in Microsoft 365.
- Benefits of Integrating ECM with SPO for Knowledge Management.
- Identifying common challenges in SharePoint search functionality.
- Key differences between metadata and taxonomy in SPO.
- Introduction to Microsoft 365 compliance and governance tools.
- ECM lifecycle stages and their relation to SPO architecture.
- The role of content types and libraries in ECM alignment.
- Planning for scalable document management within SPO.

Unit 2: Metadata Strategy and Structuring for Enhanced Search:

- Importance of metadata in content discoverability.
- Types of metadata: managed, enterprise, and user-defined.
- Creating and managing custom metadata columns in SharePoint Online SPO.
- Mapping metadata to business processes and departments.
- Best practices for naming conventions and column standardization.
- Metadata inheritance and automation strategies.
- Using default values and calculated fields to streamline tagging.
- Handling metadata in document libraries versus lists.
- Common metadata issues and how to resolve them.

Unit 3: Taxonomy Design and Term Store Management:

- Understanding taxonomies, folksonomies, and ontologies.
- Planning and designing hierarchical term sets.
- Using the SharePoint Term Store Management Tool effectively.
- Assigning terms to metadata fields for structured classification.
- Governance of term sets and taxonomy updates.
- Synonyms, pinning, and term reuse in SPO environments.
- Local vs. Global Term Sets: Use Cases and Best Practices.
- Collaboration between business users and taxonomy managers.
- Aligning taxonomy with enterprise data governance standards.

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Unit 4: Search Optimization and SharePoint Search Schema Configuration:

- Overview of SharePoint's modern search experience.
- Differences between Classic and Modern Search in SPO.
- Search schema components: crawled properties, managed properties.
- Mapping metadata to managed properties for better results.
- Configuring search verticals and result sources.
- Building search refiners and filters using metadata.
- Techniques to boost result relevance and ranking.
- Search Query Tool usage for testing and refining configurations.
- Monitoring search usage reports and user behavior analytics.

Unit 5: Enhancing User Experience and Governance:

- Structuring content libraries for intuitive navigation.
- Organizing hubs and communication sites for role-based access.
- Ensuring consistent metadata usage across teams.
- Promoting adoption of search best practices through training.
- Establishing governance policies for taxonomy and metadata.
- Handling legacy content migration and metadata normalization.
- Supporting multilingual content search in international organizations.
- Designing user feedback loops for continuous search improvement.
- Long-term maintenance plans for metadata and term stores.

Final Insights & Key Takeaways:

This Content Search and Retrieval Optimization in SharePoint Online SPO course equips professionals with essential strategies for optimizing content retrieval in SharePoint Online. By applying structured metadata and taxonomy models, participants can transform disorganized content into a searchable, accessible knowledge base. A well-optimized SharePoint environment directly contributes to faster decision-making and improved user satisfaction. Ongoing taxonomy governance and user training ensure long-term success and adaptability.