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# Implementation of Modern Record Management through SharePoint and Office 365

## INTRODUCTION

- Managing information and records, which are now one of the most valuable assets of the company represents a challenge in the modern world of digitalization where the companies are becoming digital enterprises and the data managed has to get the new names of data lakes and even the data oceans.
- As most of the companies use the Microsoft Office programs and therefore the logical solution for the Document Management will be to continue with the use of SharePoint. The people within the companies should be well prepared for the challenges that this is bringing.
- Delivering information management solutions on SharePoint can be challenging, as the Microsoft product offers very large number of options. In this training course, delegates will apprehend how to combine the information management knowledge and apply it to SharePoint in ways that make it easy to use today and adaptable to the needs of the future. This training course is ideally suited for any company that needs to build information management solutions on SharePoint, or use the product family related to SharePoint.
- This training course will highlight the elements, principles and implementation paths for modern information management challenges which require adaptability of the solutions to the realm of Big Data environment and changing specter of regulations.

This training course will highlight:

- Enterprise Content Management (ECM) strategy in modern world
- Records management as a business enabler for the enterprise
- Automation of common records management tasks and records capture
- Efficient management of records through the whole records lifecycle
- Enable and use eDiscovery
- Appropriate and inappropriate scenarios for SharePoint use
- Use SharePoint to design content import strategies
- Use of SharePoint components to create an effective user experience
- Proper way to select and configure SharePoint information protection tools



## OBJECTIVES

The delegates will:

- Create information and documentation procedures and requirements in SharePoint
- Understand Information Management in SharePoint and Office 365
- Recognize Effective Information Architecture for SharePoint and Office 365
- Acquire the knowledge on how to manage email
- Understand the relation between records management and the cloud
- Apply Privacy and data protection rules in SharePoint
- Recognize the way to implement decommissioning of legacy systems and user information
- Prepare Business and functional requirements for a digital record-keeping solution

## TRAINING METHODOLOGY

- Hands-on training rather than theoretic learning (examples based on real life cases)
- Interactive training, using the video materials, and examples of ECM success stories
- The delegates will also go through the lab exercises with SharePoint and Office 365
- The delegates will be presented with real-life cases and implementation issues, as well as the best case scenarios implemented in different industries

## ORGANISATIONAL IMPACT

- The organization will acquire structured and effective method to implement ECM solutions, satisfy stakeholders and legal requirements, as well as manage to cut costs and improve their organization workflow through the proper application of ECM solutions which enable them to comply with the requirements of the modern days and implement these solutions through SharePoint and Office 365.

This is achieved through:

- Training of the workforce to adopt effective and concise method for retaining information
- Adopt information management through the use of SharePoint and Office 365
- Reveal the benefits of adopting a modern approach to records management
- Understand Metadata, its uses and sources
- How to efficiently collect and apply metadata to digital records through SharePoint and Office 365
- Use SharePoint to ensure the authenticity of digital records for eDiscovery



## PERSONAL IMPACT

The personal impacts for all participants is to gain a deep and solid understanding and practical experience in application and operation of ECM systems through:

- Learn how to organize the documents and information management in their company
- Develop a clear metadata creation process in SharePoint and Office 365
- Learn the steps of capturing content in SharePoint
- Learn how to protect the data, implement eDiscovery and ensure security
- Learn how to eliminate the personal data and comply with GDPR, with the SharePoint auditing tool
- Use the modern solutions like built-in SharePoint capabilities to improve collaborative processes

## WHO SHOULD ATTEND?

This is a training course for all involved in data analysis, presentation and graphic design, but will be especially beneficial for:

- Document Controllers
- Secretaries
- Administrators
- People Supporting Management and/or Working in Project Teams
- Marketing Specialist
- Project Managers
- Public Relations Specialists
- Marketing Managers
- Campaign Managers
- Business Development Managers

## Course Outline

### Records Management as a Business Enabler

- Enterprise Content Management through the Record Life Cycle
- Record Capture
- Digital Records
- Paper Records
- Record Retention and Disposition
- Records Management and the Cloud



## Records and Document Management in SharePoint and Office 365

- SharePoint Architecture
- Configuring SharePoint
- Site Administration
- Search Settings in SharePoint

## Office 365

- Office 365 and the Client Device
- Office 365 Supportability
- Architecture of OneDrive for Business
- Change Management in Office 365
- Data Protection in Office 365

## Content Migration to SharePoint

- Migration Phases
- Requirements (Discovery)
- Preliminary Design (Content Inventory)
- Final Design
- Test Phase
- Go Live Phase
- Migration Scenarios

## Managing Governance, Security, and Compliance with SharePoint

- Service Assurance with SharePoint
- Managing Permissions in SharePoint
- Designing User Experience with SharePoint
- Select and Configure Information Protection Tools with SharePoint
- eDiscovery Requests Compliance in SharePoint
- GDPR and other Audit Tools for SharePoint



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