

# Modern Record Management Implementation with Office 365 and SharePoint

Keeping Records Up to Date to Support Business Needs

## Introduction

Today's digitalized world creates challenges for managing information and records, which are among the most precious assets of a firm. As businesses transform into digital organizations, the data they manage must take on new titles such as data lakes and even data seas.

Given that the majority of businesses utilize Microsoft Office, using SharePoint will continue to be the natural answer for document management. The employees of the firms must to be well equipped to meet the challenges that come with this.

It might be difficult to deliver information management solutions on SharePoint because of the vast array of possibilities available in this Microsoft product. During this training session, participants will learn how to integrate their understanding of information management with SharePoint in a way that makes it both user-friendly and future-proof. Any business that uses the SharePoint product family or wants to develop information management solutions on SharePoint will benefit greatly from taking this training course.

This Course N Carry training course will cover the fundamentals, guidelines, and strategies for addressing contemporary information management issues that call for flexible solutions to the Big Data environment and shifting legal landscape.

### **This instruction session will emphasize:**

- In the current era, enterprise content management (ECM) strategy
- Records management as an enterprise business enabler
- Automation of routine operations related to records management and record capturing
- Effective record-keeping across the whole record-lifecycle
- Turn on and use eDiscovery
- Situations that are acceptable and undesirable for using SharePoint
- Create content import strategies using SharePoint.
- Utilizing SharePoint elements to design a successful user experience
- How to choose and set up SharePoint information security tools correctly

## Objectives

## The delegates are going to:

- In SharePoint, create information, documents, guidelines, and requirements.
- Recognize how to manage information in Office 365 and SharePoint.
- Identify Efficient Information Architecture for Office 365 and SharePoint
- Learn how to properly handle emails.
- Recognize the connection between cloud computing and records management.
- Follow SharePoint's privacy and data protection guidelines.
- Understand the best practices for decommissioning old systems and user data.
- Establish the functional and business requirements for a digital record-keeping system.

## Training Methodology

- Practical instruction as opposed to theoretical learning (with examples drawn from actual situations)
- Interactive instruction utilizing the video resources and real-world ECM success stories
- Additionally, the delegates will complete the Office 365 and SharePoint lab tasks.
- The best case scenarios used in various sectors, together with real-life situations and implementation challenges, will be presented to the delegates.

## Organizational impacts

Through the proper application of ECM solutions, which enable them to comply with modern requirements and implement these solutions through SharePoint and Office 365, the organization will acquire a 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.

## This is accomplished by:

- Educating the staff to use a clear and efficient approach of knowledge retention
- Adopt information management with the usage of SharePoint and Office 365
- Highlight the advantages of implementing a contemporary records management strategy.
- Recognize metadata and its sources.
- How to effectively use Office 365 and SharePoint to gather and apply metadata to digital records
- SharePoint may be used to verify the legitimacy of digital records

## Personal Impact

**Each participant will personally benefit from gaining a thorough understanding and hands-on experience in the implementation and operation of ECM systems through:**

- Discover how to handle the information and papers in their organization.
- Provide a transparent procedure for creating metadata in Office 365 and SharePoint.

- Discover how to take screenshots in SharePoint.
- Discover how to deploy eDiscovery, preserve data, and maintain security.
- Learn how you use the SharePoint auditing tool to remove personal data and adhere to GDPR.
- Utilize contemporary tools, such as SharePoint's built-in features, to enhance teamwork.

## Who should attend?

**This is a Course N Carry training course that will be very helpful for those who work in data analysis, graphic design, and presentation.**

- Document Managers
- Secretaries
- Supervisors
- Individuals Assisting Management and/or Participating in Project Teams
- Marketing Expert
- Supervisors of Projects
- Public Relations Officers
- Managers of Marketing
- Managers of campaigns
- Managers of Business Development

## Course Outline

### Day 1

#### Enterprise Content Management via the Record Life Cycle

- Records Management as a Business Enabler Record Capture
- Digital Documents
- Documents on Paper
- Maintaining and Eliminating Records
- Cloud-Based Records Management

### Day 2

#### SharePoint and Office 365

- Document and Record Management
- Architecture of SharePoint Online
- Setting Up SharePoint
- Site Management

## Day 3

### Office 365

- The Client Device and Office 365
- Supportability of Office 365
- OneDrive for Business's architecture
- Office 365's Change Management
- Office 365 Data Protection

## Day 4

### Phases of Content Migration to SharePoint: Requirements (Discovery)

- Initial Design (Information Inventory)
- Completed Design
- Phase of Testing
- Launch Phase
- Scenarios of Migration

## Day 5

### Using SharePoint Service to Manage Security, Compliance, and Governance Assurance

- Using SharePoint Permission Management in SharePoint
- Using SharePoint to Design User Experience
- Using SharePoint, Choose and Set Up Information Protection Tools
- Compliance with eDiscovery Requests in SharePoint
- GDPR and Additional SharePoint Auditing Tools