

KOENIG SOLUTIONS • COURSE OUTLINE

Implementation of Modern Record Management Through SharePoint and Office 365

Learn to implement records management using SharePoint and Office 365, from capture and retention to migration, governance and compliance.

5 Days

DURATION

5

MODULES

26

TOPICS

COURSE OVERVIEW

This course covers records management as a business enabler, including the record life cycle, capture of digital and paper records, retention and disposition, and records management in the cloud. It then addresses records and document management within SharePoint and Office 365, covering SharePoint Online architecture, configuration, site administration and search settings, followed by Office 365 topics such as client device support, OneDrive for Business architecture, change management and data protection. Content migration to SharePoint is examined through its phases, from discovery and design to testing and go live, alongside common migration scenarios. The course concludes with governance, security and compliance in SharePoint, including service assurance, permissions, user experience design, information protection tools, eDiscovery requests and GDPR-related audit tools.

WHO THIS COURSE IS FOR

Records Managers

SharePoint Administrators

Office 365 Administrators

Compliance Officers

IT Governance Specialists

Content Migration Specialists

LEARNING OBJECTIVES

- Explain the record life cycle and its role as a business enabler
- Describe methods for capturing digital and paper records
- Apply record retention and disposition practices
- Identify considerations for records management in the cloud
- Configure SharePoint Online architecture, sites and search settings
- Describe Office 365 supportability, OneDrive architecture and protection
- Plan content migration phases from discovery through to go live
- Apply governance, security and compliance controls in SharePoint

5 Modules, 26 Topics

DAY 1

01

Records Management as a Business Enabler

TOPICS

- Enterprise Content Management through the Record Life Cycle

RECORD CAPTURE

- Digital Records
- Paper Records
- Record Retention and Disposition
- Records Management and the Cloud

DAY 2

02

Records and Document Management in SharePoint and Office 365

TOPICS

SharePoint Online Architecture · Configuring SharePoint · Site Administration · Search Settings in SharePoint

DAY 3

03

Office 365

TOPICS

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

DAY 4

04

Content Migration to SharePoint

MIGRATION PHASES

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

05

Managing Governance, Security, and Compliance with SharePoint

TOPICS

- 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

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

FLEXIBLE DELIVERY

Learn the Way That Suits You

Classroom Training

Live Online Classes (ILO)

Fly-Me-A-Trainer (FMAT)

Flexi (Self-Paced)

1-on-1 Training

Ready to Get Started?

Talk to a learning advisor about schedules, group training and customised delivery.

[Visit koenig-solutions.com](https://www.koenig-solutions.com)[✉ info@koenig-solutions.com](mailto:info@koenig-solutions.com)