

Implementation of Modern Records Management through SharePoint and Office 365

"Managing Records In Support of Business Requirements"

First Session: 7th – 9th May 2025

Second Session: 23rd – 25th July 2025

Virtual: On Microsoft Teams


Venue: Protea by Marriott Hotel Johannesburg Wanderers


Workshop Overview

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 must get the new names of data lakes and even the data oceans

Companies use the Microsoft Office programs and therefore the logical solution for the document management will be to continue with the use of SharePoint. Delivering information management solutions on SharePoint can be challenging, as the Microsoft product offers very large number of options. In this course, delegates will embrace how to combine the information management knowledge and applying it to SharePoint in ways that make it easy to use today and adaptable to the needs of the future.

This course is ideally suited for any company that needs to build information management solutions on SharePoint or use the product family related to SharePoint. It 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.

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Our experienced facilitator



Marina Hiscock

Marina Hiscock is highly creative and innovative thinker with advanced business education, holding two degrees – an MPhil in knowledge Management and Information Philosophy, and a BA in communication and industrial psychology.

With over 25years of experience in knowledge management, records management and change management, She worked in various organizations such as petrochemical, broadcasting, logistics and supply chain management, engineering, and government(Department of Health, Department of Labor, Department of Land Reform and Rural Development), as well as universities and business schools.

She has a solid background in implementing best practices and compliance standards, bringing a wealth of experience in developing and maintaining effective recordkeeping systems. In a rapidly evolving digital landscape, she stay abreast of the latest trends and technologies in records management to bring innovative and adaptive solutions to the table. Her ability to communicate complex concepts clearly and concisely facilitates seamless collaboration with stakeholders at all levels.

As a records management professional, her mission is to empower organizations to effectively manage their information assets, fostering compliance, efficiency, and strategic decision-making.

Course Objectives:

- ❖ 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

Organizational 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 will be accomplished through training of the workforce to adopt effective and concise method for retaining information.



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- ❖ Adopt information management using 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.

- ❖ 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?

All individuals who are dealing with document and record creation and management:

- ❖ Document managers
- ❖ Senior Registry Officer
- ❖ Records Managers
- ❖ Departmental Managers responsible for records management
- ❖ Departmental/ Unit records coordinators
- ❖ Document Controller
- ❖ Archive Managers
- ❖ Information Technology Staff/ Quality Control Specialists
- ❖ Company secretaries / Compliance Officers/ Auditors
- ❖ Information Governance Professionals/ Government Officials
- ❖ Representatives from Watchdogs Organization responsible for industry governance

Course Content/ Outline

Introduction to Digital Records Management

- ❖ Understanding the importance of digital records management
- ❖ Key concepts and definitions
- ❖ Records Lifecycle: Creation to disposal
- ❖ Legal and compliance considerations for digital records.
- ❖ Records Management and the cloud



SharePoint as a Records Management Tool

- ❖ Overview of SharePoint Architecture and features
- ❖ Structuring document libraries of records management
- ❖ Using metadata and content types for organization
- ❖ Document collaboration and version control in SharePoint

Office 365 Integration

- ❖ Connecting SharePoint with Office 365 Tools (OneDrive, Teams, Outlook)
- ❖ Automating Records workflows across Office 365
- ❖ Synchronizing and accessing documents on multiple devices
- ❖ Ensuring seamless user adoption across platforms

Classification and Metadata Management

- ❖ Implementing Taxonomies and metadata in SharePoint
- ❖ Organizing records for efficient search and retrieval
- ❖ Using metadata for automated workflows
- ❖ Case study: Building an effective metadata system

Implementing Records Retention Policies

- ❖ Understanding retention policies in SharePoint and Office 365
- ❖ Creating custom retention policies for different records types.
- ❖ Automating retention and disposition workflows
- ❖ Monitoring and auditing retention policies for compliance

Security and Compliance in Records Management

- ❖ Managing permissions and access control in SharePoint
- ❖ Ensuring compliance with GDPR and other regulations
- ❖ Securing confidential and sensitive records
- ❖ Implementing data loss prevention(DLP) and auditing

Automating Records Management Workflows

- ❖ Introduction to power automate for office 365
- ❖ Creating automated document approval workflows
- ❖ Setting up alerts and notifications for key records
- ❖ Streamlining document routing and task assignments

Auditing and Monitoring Your Records Management System

- ❖ Configuring Audit logs in SharePoint and Office 365
- ❖ Tracking document activity and user access
- ❖ Identifying gaps and bottlenecks in your system
- ❖ Reporting and analysing key metrics for continuous improvement.



Governance and Sustainability

- ❖ Developing a governance framework for records management
- ❖ Maintaining consistency with policies and procedures
- ❖ Ensuring user compliance with governance guidelines
- ❖ Future-proofing your digital records management strategy

Delegate Short Note:

Dear delegate this workshop provides an in-depth exploration of digital records management, focusing on the integration and optimization of SharePoint and Office 365 within your organization. From structuring your digital files and automating records retention to ensuring compliance with legal and industry standards, this course takes a holistic approach to managing digital documents.

You will learn how to create a centralized records management system that is intuitive, scalable, and secure, while leveraging the full capabilities of SharePoint and Office 365 to streamline operations. On completion of this course, you'll not only understand how to implement these tools effectively but also how to build a governance framework that ensures ongoing success in your digital records management strategy.

Training Methodology:

Our workshop combines theoretical knowledge with practical, hands-on exercises to ensure mastery of digital records management implementation. Participants will experience:

- ❖ **Facilitation:** Engage with an expert-led facilitator
- ❖ **Case Studies:** Apply concepts through real-world scenarios and case studies
- ❖ **Practical Exercises:** Participate in hands-on exercises to reinforce learning
- ❖ **Group Discussions:** Share experiences and insights with fellow participants
- ❖ **Assessments:** Evaluate your understanding through quizzes and assessments
- ❖ The entire training course will be recorded for 3days and shared with delegates after the course for revision purpose.
- ❖ A delegate copy of passport or ID book, or Smart ID should be emailed to us after registration, however it should not be certified.
- ❖ Bring your computer for case studies however it shouldn't be mandatory
- ❖ Kindly complete the registration form below to reserve your seat today however confirmation of your seat is through payment within 5days of booking for this course.
- ❖ Alliance Training and Conferencing has three experts in this subject who are Professor Claudia, Professor Khandai and Marina Hiscock.





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Registration Form

Please write in BLOCK CAPITALS

Company & Delegates Details

Company name: _____

Business Address: _____

Vat: _____

City: _____ Postal Code: _____

Fax: _____

Att: Lethu

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Delegate Details:

1. First Names: _____

Position: _____

Email: _____

2. First Names: _____

Position: _____

Email: _____

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Virtual Price: R6 999.99 (USD385)

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Authorization

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First Name: _____

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