

SharePoint and Microsoft 365 Records Governance Training Course

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Course Overview

SharePoint and Microsoft 365 Records Governance Training Course is a one-week course for records and administrative teams who leave with a Records Governance Configuration Workbook. Participants connect governance roles, record inventories, information architecture, classification, metadata, document libraries, permissions, version controls, search, retention policies and labels, disposition review, audit evidence, and migration readiness. The course focuses on operational governance decisions rather than tenant deployment. SharePoint and Microsoft 365 records governance is taught by Agile Leaders Training Center.

Who Should Attend

- Records management functions responsible for classification, retention, disposition, and evidence
- Document control functions responsible for libraries, metadata, versions, and access
- Administrative management functions responsible for record ownership and operating procedures
- Information governance functions responsible for policy translation and control design
- SharePoint site ownership functions responsible for business records and local governance

The course assumes participants already manage business documents or records and leaves out tenant deployment, coding, cybersecurity engineering, and general platform administration.

Departments and Industries

The course supports records governance across corporate administration, professional services, healthcare administration, education, public services, and regulated operations.

- Corporate administration and shared services
- Legal, compliance, and professional services
- Healthcare and education administration
- Public-service and nonprofit organizations
- Engineering, construction, and operational document control

Learning Objectives

By the end of this course, participants will be able to:

- Analyze record requirements, ownership, and governance roles
- Build SharePoint classification, metadata, and library controls
- Apply permissions, version control, and search configurations
- Compare retention policies, labels, and record declarations
- Evaluate disposition, audit evidence, and migration readiness
- Build a Records Governance Configuration Workbook

Course Agenda

Day 1: Records Governance Foundation

- Business Records Scope Map
- Records Governance Responsibility Matrix
- Record Requirement Inventory
- Microsoft 365 Records Control Boundary
- Governance Decision Register

Day 2: Classification and Metadata

- SharePoint Information Architecture Map
- Record Classification Scheme
- Metadata Field Definition Sheet
- Content Type Assignment Matrix
- File Plan Mapping Worksheet

Day 3: Library and Access Controls

- Document Library Design Checklist
- Permission Inheritance Decision Guide
- Version History Control Standard
- Record Search and Retrieval Test
- Library Ownership Review Log

Day 4: Retention and Disposition

- Retention Policy and Label Decision Matrix
- Microsoft Purview Record Declaration Plan
- Disposition Review Workflow Map
- Audit Evidence Requirements Register
- Records Migration Readiness Checklist

Day 5: Records Governance Practice

- Governance Role Assignment Exercise
- Classification and Metadata Design Exercise
- Library Permission and Version Control Simulation
- Retention and Disposition Review Exercise
- Capstone Records Governance Configuration Workbook

Practical Exercises

The course uses suggested activities drawn from corporate, professional-service, healthcare, education, and operational record environments.

- Suggested activity: define record ownership and governance decisions for a shared service
- Suggested activity: classify sample records and specify metadata, content types, and library locations
- Suggested activity: test permissions, version history, retrieval, retention, and disposition decisions
- Suggested activity: assess migration evidence and complete a records governance configuration workbook

FAQs

Who does the SharePoint and Microsoft 365 Records Governance Training Course suit and what does it assume?

The course suits records officers, document controllers, administrative managers, information governance coordinators, compliance support teams, and SharePoint site owners who already manage business documents or records.

How does SharePoint and Microsoft 365 records governance differ from general SharePoint administration?

Records governance defines classification, metadata, ownership, retention, disposition, and evidence controls; general SharePoint administration manages broader site, service, and technical settings.

When should Microsoft 365 records governance use a retention policy or retention label?

A retention policy applies common settings broadly to supported locations, while a retention label applies item-level settings and can declare content as a record or trigger disposition review.

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What belongs in a Records Governance Configuration Workbook?

A Records Governance Configuration Workbook contains governance roles, record scope, classification, metadata, content types, libraries, permissions, version controls, retention decisions, disposition workflow, audit evidence, and migration checks.

How should SharePoint records migration readiness be evaluated?

Migration readiness is evaluated by confirming record ownership, source inventories, classification mappings, metadata quality, retention requirements, permissions, version needs, destination libraries, exception handling, and validation evidence.

Conclusion

Participants take back a Records Governance Configuration Workbook linking governance roles, classification, metadata, libraries, access, versions, search, retention, disposition, evidence, and migration readiness. It makes configuration decisions and control ownership visible before records are moved or governed. The workbook supports consistent operational choices without replacing technical deployment or legal interpretation.

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