



### This course is ideal for...

IT, records managers, business unit managers, and other professionals who need to ensure that your organization's information and records are managed effectively in SharePoint and Office 365.

You'll acquire the necessary skills to:

- Identify appropriate and inappropriate scenarios for SharePoint
- Design content import strategies
- Configure search to improve findability
- Select SharePoint components to create an effective user experience
- Select and configure information protection tools

# Implementing Information Management on SharePoint and Office 365

Learn to leverage SharePoint and Office 365 to manage information better in support of business objectives

## Course Benefits and Objectives

Delivering information management solutions on SharePoint can be challenging. There are so many options in SharePoint. In this course, you'll learn how to take your information management knowledge and apply it to SharePoint in ways that make it easy to use today and adaptable to the needs of tomorrow. The course is ideal for anyone who needs to build information management solutions on SharePoint.

Developed by 15-time Microsoft MVP Rob Bogue, this highly interactive course is applicable across all industries. Whether you're an ECM expert from another platform or new to information management, you'll find out how to make it real in this practical, four-day course.

Practical labs have you building the same kinds of term sets, hierarchies, workflows, records retention rules, and other components that you will need to deliver back in your organization. Instruction interspersed with labs allow you to connect what you know to what you'll need to do to be successful.

## Your Learning Options

The Implementing Information Management on SharePoint and Office 365 course is comprised of multiple topics, video demonstrations, and hands-on labs leading to the AIIM Master designation. The course presentations, supporting materials, and exams are accessible online and on-demand from AIIM's training portal for six months.

The **Implementing Information Management on SharePoint and Office 365** course is available as an online, self-paced course, or in a four-day, live, instructor-led format in physical classrooms in select cities around the world. Our enrollment page at [www.aiim.org/training](http://www.aiim.org/training) will indicate when and if such classes have been scheduled.

We can also deliver these as private courses for individual organizations, and even customize course content to focus on particular areas. Contact us at [academy@avaali.com](mailto:academy@avaali.com) for more information on private and custom training.

### Feedback:

*“Really useful content with real world examples.”*

*“I’ve been pleasantly surprised by the AIIM SharePoint training and certification, especially because it is complementary to Microsoft certification. While Microsoft certification focuses on how to do something, AIIM certification focuses on why certain tasks need to be done in the first place, and best practices regarding SharePoint*

*for compliance. The two certifications are stronger taken together. I’m grateful that I have pursued both.”*



## Course Topics

### Implementing Information Management on SharePoint and Office 365

- **Introduction to Information Management in SharePoint and Office 365**  
Identify appropriate and inappropriate scenarios for SharePoint; classify needs for solutions by SharePoint on-premises, online, or hybrid
- **Effective Information Architecture: Columns and Content Types**  
Select appropriate column types; identify the advantages of managed metadata term sets; identify the reusability benefits of content types
- **Effective Information Architecture: Storage, Integration, and Taxonomies**  
Select and create appropriate SharePoint containers; create choice lists and term sets
- **Capturing Content**  
Select appropriate options for uploading content; design content import strategies; select the appropriate electronic forms solution
- **Designing User Experience**  
Select SharePoint components to create an effective user experience; design navigation
- **Improving Search Relevance**  
Design content information listings for maximum understandability
- **Developing Search User Experiences**  
Identify factors impacting search findability; configure search to improve findability; customize search results formatting
- **Security**  
Select and configure information protection tools; set appropriate access controls and permissions
- **Collaboration: Structured and Unstructured**  
Determine the appropriate collaboration approach; use standard SharePoint workflows; use built-in SharePoint capabilities to improve collaborative processes
- **Records, Retention, and Discovery**  
Implement records management; respond to eDiscovery requests; establish records retention rules

### Register for self-paced online or in-person training today.

Details and enrollment are a click away. Visit [Avaali.com/academy](http://Avaali.com/academy)

### Our education counselors are standing by:

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