
Microsoft 365 Recordkeeping: Purview Retention Labels and File Plans Course

7 – 11 March 2027
Zoom





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Programme Summary

Microsoft 365 recordkeeping with Purview retention labels and file plans is the subject of this five-day training course for records and information managers at advanced level, culminating in a configured records implementation blueprint. Many organisations have moved documents into SharePoint and Teams without moving their retention schedule, leaving records unclassified. The approach moves from recordkeeping principles to file plan design, labelling, site architecture, disposition and migration. Mars Training Centre UK delivers this programme in Microsoft 365 recordkeeping.

The Business Case

When retention rules live in a policy document rather than in the platform, staff keep everything or delete at will, and no one can show which version of a record is authoritative. Configuring the schedule in Microsoft Purview makes classification routine and gives legal and audit teams defensible evidence of disposal.

- Records Retrieval Time: Shortens as content is filed in designed sites and libraries with consistent metadata.
- Legal and Audit Exposure: Falls as holds, record declarations and proof of disposition are applied and logged in one place.
- Storage and Redundant Content: Reduces as disposition review removes content that has passed its retention period.

Principles and Evidence Base

- ISO 15489: Its principles for authentic, reliable and usable records anchor the design decisions in Session 1.
- Microsoft Purview Records Management: Its file plan, retention labels, record declaration and disposition review features are configured in Session 2 to Session 4.
- Microsoft Purview eDiscovery: Its holds keep litigation needs in step with retention in Session 4.
- Information Architecture: Content types, metadata and hub-based site design for SharePoint Online shape Session 3.

Intended Participants

- Professionals who own the organisation's retention schedule and must enforce it in Microsoft 365.
- Leads who design SharePoint sites, libraries and metadata for controlled content.
- Managers who coordinate holds and disposal with legal and audit.
- Specialists planning the move of legacy file shares and paper indexes into Microsoft 365.



The programme serves records management, document control, legal and IT functions in government entities, energy, banking and healthcare.

Learning Outcomes

1. Participants will be able to translate a retention schedule into a Purview file plan.
2. Participants will be able to configure retention labels and auto-apply rules for record classes.
3. Participants will be able to design SharePoint sites and libraries for records capture.
4. Participants will be able to run multi-stage disposition review and retain proof of disposition.
5. Participants will be able to reconcile eDiscovery holds with retention settings.
6. Participants will be able to plan the migration of legacy file shares into labelled locations.

Programme Structure

Day 1: Recordkeeping Principles for Microsoft 365

What must a records system in Microsoft 365 guarantee, and where do records live?

- ISO 15489 Characteristics of Authoritative Records
- Records Locations: SharePoint Online, OneDrive, Teams and Exchange
- Retention Policies Versus Retention Labels
- Appraisal of Record Classes and Business Functions
- Gap Analysis of the Current Retention Schedule

Day 2: File Plan and Retention Label Design

How is a retention schedule expressed as a working Purview file plan?

- File Plan Descriptors: Reference ID, Function, Category and Authority
- Retention Periods, Triggers and Event-Based Retention
- Record and Regulatory Record Declaration Options
- Record Versioning and Locked Content Behaviour
- File Plan Import, Export and Change Control

Day 3: SharePoint Records Architecture and Auto-Labelling

How are sites and libraries built so records are classified with little user effort?

- Hub, Site and Library Design for Records Capture
- Content Types and Managed Metadata for Record Classes
- Default Library Labels and Folder Inheritance
- Auto-Apply Labels Using Keywords, Sensitive Information Types and Trainable Classifiers
- User Adoption Guidance and Labelling Error Monitoring



Day 4: Disposition, Holds and Legacy Migration

How is content disposed of defensibly, preserved when required and brought in from old stores?

- Multi-Stage Disposition Review and Proof of Disposition
- eDiscovery Holds and Their Interaction With Retention
- Activity Explorer and Audit Log Evidence
- Legacy File Share Assessment and Redundant Content Clean-Up
- Migration Mapping From Folders to Labelled Libraries

Day 5: Applying the Microsoft 365 Recordkeeping Blueprint

Is the recordkeeping design complete, tested and ready for rollout?

- Validating the Day 2 File Plan Against Business Functions
- Testing Day 3 Auto-Labeling Rules on Sample Content
- Sequencing Day 4 Migration Waves and Disposition Cycles
- Roles, Training and Records Champion Network
- Completing the Records Implementation Blueprint

Methodology

The programme uses structured exercises in a demonstration Microsoft 365 tenant alongside case analysis. Participants build a file plan, configure labels, design a records site and walk through a disposition review. Cases come from a ministry registry, an engineering contractor and a bank.

- Suggested activity: Converting ten lines of a paper retention schedule into file plan entries.
- Suggested activity: Designing a records library with content types and a default label.
- Suggested activity: Resolving a conflict between an eDiscovery hold and a disposition date.

Capstone Output

Each participant completes a records implementation blueprint. It contains a file plan, a label and policy design, a SharePoint records architecture, auto-labelling rules, a disposition and hold procedure and a migration plan. It is the basis for rollout approval.

Frequently Asked Questions

Is Microsoft 365 recordkeeping training suitable for experienced records managers?

Yes. It is set at advanced level for professionals who already manage a retention schedule and assumes working familiarity with SharePoint Online.



Which standards does Microsoft 365 recordkeeping training rest on?

It rests on ISO 15489 for records principles and on Microsoft Purview Records Management and eDiscovery for platform configuration.

How is the Microsoft 365 recordkeeping blueprint used at work?

You can hand it to records and IT teams as the build specification and use it to sequence migration waves.

How does Microsoft 365 recordkeeping differ from an executive information governance programme?

It configures retention, labelling and disposition inside the platform, whereas an executive governance programme sets policy and accountability.