RIMtech Online Training

RIMtech
www.rimtechconsulting.com

Advanced Purview Compliance Training

Microsoft Purview Masterclass: Deploying for Defensible Compliance

Records Management, Information Protection & eDiscovery for IT Professionals

Duration
24 hours (3 days)

Most Microsoft Purview training teaches features. This program teaches outcomes. Organizations invest heavily in Microsoft Purview to improve compliance, protect sensitive information, manage records, and respond to legal and regulatory demands. Yet many deployments fail to achieve their intended objectives because IT teams learn what the product can do without learning how to deploy it in a way that delivers measurable, defensible compliance.

This intensive three-day masterclass brings together RIMtech's three flagship Purview courses—Defensible Compliance Deployment, Information Protection, and eDiscovery—into a single comprehensive learning experience designed primarily for IT professionals responsible for implementing, managing, and supporting Microsoft Purview.

Participants will learn how to transform Purview from a collection of features into an integrated compliance platform. The course focuses on the critical architectural, governance, operational, and deployment decisions that determine whether a Purview implementation will withstand audits, investigations, litigation, privacy reviews, and regulatory scrutiny.

Unlike vendor demonstrations, YouTube tutorials, and generic feature-based training, this program is grounded in real-world compliance requirements and decades of practical implementation experience. Participants will learn how to design defensible retention architectures, automate records classification, protect sensitive information, control data leakage, govern AI access, apply legally defensible holds, manage investigations, preserve chain of custody, and efficiently locate and produce evidence.

By the end of the program, participants will understand not only how Microsoft Purview works, but how to deploy, configure, and operate it as a complete compliance ecosystem. They will leave with a practical implementation roadmap, proven deployment strategies, and the confidence to build a Purview environment that delivers genuine compliance rather than the illusion of compliance. You will learn how to:

- Design and deploy Microsoft Purview to achieve measurable, defensible compliance
- Establish the correct compliance and governance posture for enterprise Purview deployments
- Restructure retention schedules and file plans for effective use within Purview
- Create and manage retention labels, policies, and content rules at scale
- Implement automated classification and records declaration using advanced Purview capabilities
- Address the challenges of event-driven retention and case records management
- Understand the Microsoft 365 Substrate, Search Schema, KQL, and other critical Purview internals
- Identify, classify, and govern sensitive information across the Microsoft 365 ecosystem
- Design and deploy sensitivity labels, encryption, and usage rights controls
- Implement Data Loss Prevention (DLP) strategies to reduce accidental and intentional data leakage
- Secure Teams, SharePoint, Microsoft 365 Groups, and other collaboration environments
- Control external sharing while maintaining compliance and business productivity
- Govern Microsoft Copilot and AI-powered access to sensitive information
- Use analytics and reporting tools to measure classification effectiveness and compliance performance
- Configure and manage legally defensible eDiscovery cases, custodians, and legal holds
- Perform advanced searches across SharePoint, Teams, OneDrive, Exchange, and other Microsoft workloads
- Build and maintain a robust chain of custody for investigations, audits, and litigation
- Use OCR, conversation reconstruction, review sets, and predictive coding to locate critical evidence faster
- Safely redact, export, and transfer information for external legal review
- Develop a comprehensive Purview implementation roadmap that integrates records management, information protection, and eDiscovery into a unified compliance platform

RIMtech

CATALYST
Information Governance Tools

Learning Objectives

Upon completion of this MasterClass, participants will be able to:

- **Design and deploy Microsoft Purview to achieve measurable, legally defensible compliance** that can withstand audits, investigations, litigation, and regulatory scrutiny.
- **Develop an enterprise Purview governance architecture** that integrates records management, information protection, and eDiscovery into a unified compliance strategy.
- **Configure retention schedules, retention labels, policies, and automated content classification rules** to support large-scale compliance objectives.
- **Implement information protection controls** including sensitivity labels, encryption, usage rights, data loss prevention (DLP), and secure collaboration environments.
- **Identify, classify, protect, and govern sensitive information** across Microsoft 365 workloads using automated and scalable protection mechanisms.
- **Govern AI-powered information access** by implementing appropriate controls for Microsoft Copilot and other emerging technologies.
- **Apply advanced Purview eDiscovery techniques** including legal holds, custodian management, collections, review sets, conversation reconstruction, OCR, and predictive coding.
- **Establish and maintain a defensible chain of custody** while preserving, reviewing, redacting, and exporting evidence for legal, regulatory, and investigative purposes.
- **Understand and leverage critical Purview architecture components** including the Microsoft 365 Substrate, Search Schema, KQL, auto-apply policies, and other foundational technologies.
- **Develop a practical implementation roadmap** for deploying and operating Microsoft Purview as an enterprise-wide compliance platform that reduces risk, protects information, and improves organizational defensibility.

Testimonials

"I loved the performance measure aspect, and 20 suggested decisions. This was worth the cost of the course alone."

"I really liked the presenter. He engaged the attendees and asked thought-provoking questions that generated some lively conversations."

"This was one of the most engaging and informative seminars I can remember attending. I got a lot of great takeaways and can enthusiastically tell my employer that this was a productive use of my time and training dollars."

"Thank you! This course hit the nail on the head – it touched on many of the issues that I see in the workplace and provided me with the guidance and affirmation that will help me to manage these issues. Awesome seminar!"

Who Will Benefit

IT Professionals responsible for eDiscovery deployment, Legal Counsel, Privacy Officers, Records and Information Professionals.

Takeaway Tools

Participants are supplied with all course materials, including diagrams and summaries of Purview capabilities.

Certification Credits

IGP Information Governance Professional — 21 CEUs

ICRM Institute of Certified Records Managers — 21 CEUs

CERTIFIED Information Professional — 21 CEUs

Instructor

Bruce Miller, MBA, IGP is a world leading expert on electronic recordkeeping. He is an independent consultant, an author, and an educator. Widely regarded as the inventor of modern electronic recordkeeping software, he pioneered the world's first commercial electronic recordkeeping software in 1989. In 1997 he achieved the world's first e-Records software certification against the US DoD 5015.2-STD standard, and has since presided over several successful software certifications. In 1999 he developed the world's first e-Records software ***engine*** for business software. That year he received ARMA Canada's National Capital Region's **Ted Ferrier Award of Excellence** for his contribution to the field of records management. Bruce's software was the first technology in the world to be certified against the revised 5015.2 June 2002 standard. In 2002 his company was acquired by IBM, where he served for three years as IBM's global e-Records Strategy and Business Development Executive. At IBM he was honored as a *Technical Leader*, one of only 439 out of 360,000 IBM employees. Mr. Miller is the recipient of the prestigious **Emmett Leahy Award**, considered the highest international recognition given to professionals in the field of information and records management. His book "*Managing Records in Microsoft SharePoint 2010*" was an ARMA best seller, and the second edition was released in October 2015. Bruce holds a Diploma in Electronics Engineering Technology, a Masters in Business Administration from Queen's University, and is a certified Information Governance Professional. Throughout his career, he has founded 4 companies:

Provenance Systems	World's first electronic records software
Tarian Software	World's first reusable electronic recordkeeping engine
RIMtech	Electronic records education and consulting
Catalyst IG Tools	Specialty EDRMS deployment tools for Microsoft SharePoint

Course Topics

Topic	Duration	Description
Microsoft Purview: Deploying for Defensible Compliance	1 Day	This course focuses on the strategic architecture required to achieve measurable, legally defensible compliance with Microsoft Purview. Participants learn how to establish the correct compliance posture, redesign retention schedules and file plans for Purview, understand the differences among Purview policies, and deploy retention labels at scale using content rules and auto-apply techniques. The course explores event-driven retention, the Microsoft 365 Substrate, automation strategies, record versioning, preservation copies, trainable classifiers, disposition review, and deployment planning. Emphasis is placed on overcoming Purview's architectural limitations, avoiding common deployment mistakes, and implementing governance structures that can withstand audits, investigations, litigation, and regulatory scrutiny.
Microsoft Purview Information Protection	1 Day	This course teaches how to deploy Microsoft Purview Information Protection to reduce risk, protect sensitive information, and support compliance objectives. Topics include Sensitive Information Types (SITs), data profiling, sensitivity labels, encryption, usage rights, email protection, and container labelling for Teams, Groups, and SharePoint. Participants learn how to implement auto-labelling policies, Data Loss Prevention (DLP), content marking, classification analytics, user overrides and justification controls, and secure external sharing. The course also examines how to govern Microsoft Copilot and AI-powered access to information while maintaining protection, privacy, and compliance. The emphasis is on practical deployment strategies that deliver defensible protection rather than simple feature configuration.
Microsoft Purview eDiscovery	1 Day	This course provides a comprehensive understanding of defensible eDiscovery using Microsoft Purview. Participants learn eDiscovery principles based on the EDRM model, case management, permissions, data sources, advanced search techniques, legal holds, custodian management, notifications, and data collection. The course covers review sets, predictive coding, conversation reconstruction, OCR processing, redaction, exporting, and chain of custody management. It also explores the use of AI to identify relevant evidence and sensitive Copilot prompts. Emphasis is placed on reducing review costs, preserving evidence integrity, protecting privileged information, and configuring Purview eDiscovery to support investigations, litigation, audits, and regulatory requests in a legally defensible manner.

Advantages of RIMtech Training

- ✓ **NOT** a feature tour. Practical, real-life deployment training based on actual projects.
- ✓ 100% vendor neutral content. We do not sell Microsoft products or services. We are not tied to Microsoft in any way.
- ✓ Instruction by **Bruce Miller**. Learn from, and interact with, the top expert in electronic recordkeeping.
- ✓ We understand IT AND records management. We speak your language.
- ✓ We simplify complex technology so you can understand it.
- ✓ We have developed Catalyst IG Tools –the world's only specialized tools for EDRMS deployment.
- ✓ Real-world examples and experience from actual projects.
- ✓ The very latest in technology, techniques, and methods.
- ✓ Best practices, developed by RIMtech.
- ✓ Engaging, dynamic, interactive instruction. Exercises to facilitate learning.
- ✓ You get to keep materials and tools following completion.
- ✓ Access to full session recording
- ✓ CRM/IGP/CIP credits for all courses.
- ✓ Official Completion Certificate.

Registration Form (1 form per participant)				Class	PurPKG1U
Mr/Ms/Mrs.	Name			Title	
Organization			Dept.		
Address					
City	State/Prov	Zip/PostCode	Country		
Telephone	Email				
Payment Method					
Please Bill Credit Card	☐ Visa	☐ Mastercard	☐ Amex		
Name on Card					
Card Number		Expiry Date (YY/MM/DD)		CCV	
Signature					
☐ Cheque, Payable to RIMtech Inc.	☐ Invoice, P.O. # (Attach P.O.)				

Five Ways to Register & Pay	
Online	Go to the appropriate class page under Training & Education. Select the class, then pay via PayPal or credit card
Telephone	Call Natalie Arruda at 343-572-8533 to give your credit card details over the phone.
Email	Complete this form and scan it to PDF, then email it to us at natalie@rimtechconsulting.com
Cheque	Complete this form and enclose a cheque. Mail to RIMtech Inc., 50 Argue Drive, Ottawa, On Canada K2E 6S1
Purchase Order	Complete this form, include Purchase Order, scan to PDF, then email to us at natalie@rimtechconsulting.com

Microsoft Purview MasterClass	**Price**	
	Regular	**ARMA/AIIM Member**
	US $800	US $700
Applicable Taxes	Outside Canada	none
	AB, SK, BC, MB, NT, QC, NU, YT	5%
	ON	13%
	NB, NL, NS, PE	15%

Technology Requirements

1. Reliable, stable high-speed Internet connection
2. Zoom App available at https://**zoom**.us/**download** (downloads automatically upon first meeting sign-in)
3. Camera optional but recommended

Terms and Conditions

This is a summary only. See https://www.rimtechconsulting.com/terms-conditions for our detailed Terms and Conditions.

1. **Equipment Requirements**. Each participant is responsible for the technology requirements above in order to participate successfully in any RIMtech online class or event.
2. **No Recordings**. Sessions are not recorded, to protect the privacy of participants.
3. **Class Materials**. Participants will receive all class materials in electronic form. Materials will be posted to a restricted page of RIMtech's website for that particular class.
4. **No-Shows.** If a participant fails to attend a class without a notification of cancellation, no refund will be issued. RIMtech will make the class materials available for that participant.
5. **Payment.** Payment, or a Purchase Order, must be received by the class date. All invoices are due within 30 days.
6. **Participant Contact**. We require the name, email addresses, and telephone number of each participant prior to the start of each class.
7. **Participant Substitution**. A participant may be substituted at any time, by contacting natalie@rimtechconsulting.com.
8. **Participant Cancellation**. To cancel, you must notify us 5 days prior to the class date. The class fee will be refunded less a 10% administrative fee. If cancellation is received later than 5 days prior to class start date, participant may nominate a substitution, or RIMtech will issue a credit voucher for the full amount of the class, redeemable for 1 year against any class of equal or lesser value.
9. **RIMtech Cancellation**. RIMtech reserves the right to cancel any class for any reason, such as a failure to reach the minimum class registration size, instructor illness, etc. In such an event, RIMtech shall refund the full registration fee paid. RIMtech will make every effort to notify registrants as soon as possible of any such cancellation.
10. **RIMtech Postponement**. RIMtech reserves the right to postpone/reschedule any class for any reason and will, in such an event, work with registrants to find a mutually acceptable reschedule date. If such a date is not acceptable to any registrant, a full refund will be issued. RIMtech will make every effort to notify registrants as soon as possible of any such cancellation.
11. **Liability**. RIMtech assumes no liability for changes in course dates or content.
12. **Currency**. All fees are in US dollars.

Natalie Arruda natalie@rimtechconsulting.com 343-572-8533
Bruce Miller bmiller@rimtechconsulting.com 613-795-3072