

### State of the Art Electronic Recordkeeping Techniques & Technology

#### Deploying Microsoft Purview for Defensible Compliance

**Duration**  
8 hours (1 day)

*Instruction by Bruce Miller IGP, MBA*

PurRM1U

*RIMtech Public Online Courses are scheduled periodically and open to anyone. Attendance is limited to optimize the learning experience. We assume your content management platform will be Microsoft SharePoint. All courses are fully and equally applicable to any of the (5) popular records management software products available for SharePoint, with the exception of courses where we teach specific records software products.*

Tired of all the Purview training videos? So are we! Typically just a stream of what Purview can do. Not very helpful. Microsoft Purview is one of the most powerful — and misunderstood — platforms ever introduced into the Microsoft ecosystem. For Records Managers, Purview can feel overwhelmingly technical, filled with unfamiliar terminology, hidden dependencies, and complex automation concepts that seem disconnected from traditional records management principles. For IT professionals, the challenge is equally serious: they may understand Microsoft 365 infrastructure, but often lack the records management expertise necessary to deploy Purview in a way that achieves genuine compliance, defensible disposition, and long-term governance success.

This course bridges that gap.

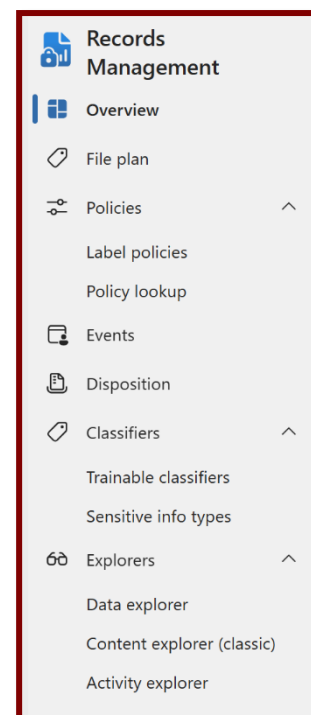
This course is not a hands-on product training experience. Nor is it a Webinar-like stream of “What Purview can do”. Unlike most Purview training, this is not a feature tour, product demonstration, or marketing presentation. You will not spend the day watching someone click through menus explaining what buttons do. Instead, this course teaches what actually matters:

- How Purview really works beneath the surface,
- Where its compliance strengths and weaknesses truly exist,
- How to safely deploy it in real-world environments,
- And how to achieve demonstrable, defensible records management compliance.

This course translates Purview’s highly technical architecture into practical records management concepts that both Records and IT professionals can understand and apply immediately. You will learn how Purview’s retention engine, auto-apply architecture, event-driven retention, disposition processing, preservation copies, record versioning, and compliance controls actually behave in production environments — not merely how Microsoft markets them. The course also addresses one of the biggest hidden risks in Purview deployments: assuming that Purview implementation automatically equals records management compliance. It does not. Special emphasis is placed on the intersection between Records Management and IT — helping each side understand the priorities, language, constraints, and responsibilities of the other. This dramatically improves project communication, deployment quality, and long-term adoption success. This course is especially valuable for:

- Records and Information Management professionals struggling to understand Purview’s technical complexity,
- IT professionals tasked with deploying Purview without formal records management expertise,
- compliance officers and governance leaders,
- Microsoft 365 project teams,
- and organizations seeking to implement a truly compliant Microsoft-based EDRMS.

The guidance provided is candid, practical, and based entirely on what works in real-world compliance environments. If your organization is planning, deploying, repairing, or governing Microsoft Purview for records management, this course will help you avoid costly mistakes and build a far more effective, compliant, and sustainable solution.



## Learning Objectives

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

- Reposition Purview's default posture to fully support measurable compliance
- Restructure your retention schedule for use in Purview
- Understand the different types of Purview Policies
- Create, deploy, and manage retention labels appropriately
- Write effective content rules (Auto-Apply Policies) to deploy retention labels at scale
- Understand event-driven records (case records), Purview's challenges in handling them, and an alternative approach to achieve compliance
- Explore the inner workings of Purview, such as the M365 Substrate, Search Schema, and KQL Query Language in order to fully utilize Purview appropriately
- Learn how to prevent Purview's disposition process from undermining compliance
- Explore an overall strategy/plan for full Purview deployment

## Who Will Benefit

All project stakeholders will benefit from this course, including Records/Information Management professionals, IT managers and specialists, project managers, compliance officials, and senior management.

## Takeaway Tools

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

## Certification Credits

<b>IGP</b>	<b>14</b> (ARMAIGP2020_00077)	<b>CRM</b>	<b>7</b> (2020111626794)
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## 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**  
**Tarian Software**  
**RIMtech**  
**Catalyst IG Tools**

World's first electronic records software  
World's first reusable electronic recordkeeping engine  
Electronic records education and consulting  
Specialty EDRMS deployment tools for Microsoft SharePoint

## 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!"*



## Course Topics

Topic	Description
<b>Purview Records Management Topics</b>	
<b>Compliance Posture</b>	Purview establishes a certain "posture" out of the box. This default posture is unlikely to achieve true, measurable compliance. You'll need to change this default posture to deliver strong compliance that can be measured and proven.
<b>Retention Schedule</b>	No, you absolutely cannot use your existing retention schedule. It will have to change. You'll need to restructure it for use in Purview.
<b>The File Plan</b>	This is your retention schedule, consisting of the various retention rules. But it doesn't work the same way as a traditional retention schedule. Learn its differences, and how the rules are used in automated declaration and classification processes.
<b>Purview Policies</b>	Purview has retention policies, label policies, sensitivity policies, and more. They are very different, and you'll need to understand their characteristics, and use cases, to deploy them appropriately for compliance.
<b>Retention Policies</b>	Retention Policies are not records-compliant. Explore use cases for them and learn how to avoid downstream compliance headaches such as competing retention rules.
<b>Retention Labels</b>	Retention labels are the retention rules from your retention schedule. Labels are highly configurable, and there are many different ways to apply them to SharePoint content. What you put into the label is critical to ensure compliance once the labels are applied. What should you put into the label, and what must be avoided? What are the best ways to apply the labels? How do you manage the labels once applied to thousands or millions of records? What you put into a label, and how you applied it, determines what you can and cannot do with it once applied.
<b>Content Rules</b>	Content rules, known as <b>Auto-Apply Policies</b> in Purview, are what makes Purview tick. They are the beating heart of Purview that delivers compliance. They determine what retention rules are applied to SharePoint content. Compliance is impossible without them. A deep understanding of Purview internal workings is required to write them, including the KQL Query Language, M365 Substrate, and scarce M365 data resources. Learn how to write, test, and deploy content rules, how to form a strategy to scale to your project, and how to overcome resource limitations at scale.
<b>Event-Driven Retention</b>	60%+ of your records will have event-driven retention. Known as case records, this is the single biggest challenge to achieving compliance with Purview. It is complex and has serious limitations. Learn the default Purview approach, and an alternative method to manage case records that will be easier to implement and manage over time.
<b>The M365 Substrate</b>	Yes – you really do need to understand the M365 substrate. Compliance is impossible without it. Learn where to find it, how it works, why you need to use it, and its notorious limitations.
<b>Automation</b>	Discover why "Auto-Apply" is the <b>ONLY</b> safe way to achieve recordkeeping compliance with Purview. Understand the various auto-apply methods and learn which methods will support compliance, and which will reduce compliance.
<b>Record Versioning</b>	This is an unusual feature that allows users to edit/delete immutable records. This feature greatly increases overall system complexity. Understand all the downstream consequences of this feature, and how to avoid complexity.
<b>Preservation Copies</b>	Under certain circumstances, Purview automatically creates a secret copy of a record. You'll need to understand when they are created, where they are stored, and how to manage them. For true compliance, all copies of all records must be accounted for.
<b>Trainable Classifiers</b>	This is how you can use lightweight AI to classify records. They're great, but can you depend on them to achieve compliance? Learn how and when to use trainable classifiers, and when to avoid them.
<b>Disposition Review</b>	Purview's disposition review process is critically important, but it undermines compliance in several ways. We'll show you how to implement it to preserve compliance while streamlining the review process.
<b>Deployment Strategy</b>	Learn an overall high-level plan/strategy to deploy your Purview-based EDRMS.

## 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 IGP 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 credits for all courses.
- ✓ Official Completion Certificate.

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

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

Deploying Microsoft Purview for Defensible Compliance	Price	
	Regular	ARMA 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](mailto: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.



[www.rimtechconsulting.com](http://www.rimtechconsulting.com)

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