

SharePoint - Advanced

“Going beyond basic permissions to organise, preserve and secure documents in SharePoint”

Our Advanced level SharePoint course will take you through the basics of key governance and management features as an Introduction to Governance and information protection

In this course, you will learn to:

- Create and use managed metadata to classify your documents
- Create a content type to distribute corporate templates
- Create and Apply document retention labels to manage how long documents are retained
- Use Sensitivity labels and policy to restrict sharing and external access
- Explore SharePoint Site security

Detailed Content

Taxonomy

Overview
Planning
Create a Taxonomy manually
Import from Excel via CSV
Apply to a library and documents
Create views to filter and Group files based on metadata

Content Types

Overview
Create a document-based Content Type
Upload a document template
Add extra metadata columns (incl create Site Column and using Taxonomy)
Add Information Management Policy settings
Publish a Content Type
Add to a library

Library and Site level Settings

Overview
Record Declaration/In Place record management
Document ID

Retention Labels and Policy

Overview
Create Retention Label
Publish Retention Label
Applying a Retention Label to a document
Applying a Retention label to a library

Sensitivity Labels/Information Protection

Overview
Create and Apply Sensitivity labels
Create policy to restrict sharing and external access
Document Information Protection Policy

Security

Overview
Differences in Security between types of sites
Using and breaking Inheritance
Groups
Custom permission levels

Overview of other Document management and security features

Data Loss prevention
E-discovery