

## Enterprise Content and Records Management in SharePoint 2013

Duration: 1 day

### Overview:

This one-day course examines how to plan, configure, and manage Enterprise Content Management (ECM) and Records Management in a Microsoft SharePoint Server 2013 or SharePoint Online environment. It also introduces Governance in SharePoint 2013, and how to plan and create appropriate policies for SharePoint sites.

### Target Audience:

This course is targeted at experienced Content Managers, Records Managers, Business Analysts, System Analysts and IT Professionals interested in using SharePoint for ECM and Records Management, in either the data centre or cloud. The training is also helpful for existing SharePoint 2010 customers who need to understand some major improvements in these areas from SharePoint 2010 to SharePoint 2013.

### Pre-requisites:

Before attending this course, students must have completed SharePoint 2013 End-User Training: Site Owner, or have equivalent knowledge.

### Module 1: Planning and Configuring Enterprise Search

#### Lessons

- Configuring Search for an Enterprise Environment
- Configuring the Search Experience
- Optimising Search

#### Lab : Planning an Enterprise Search Deployment

- Planning a Search Solution

#### Lab : Managing Search Relevance in SharePoint Server 2013

- Configuring a Thesaurus
- Configuring Entity Extractors and Refiners
- Configuring Query Spelling Correction
- Configuring Company Name Extraction

### Module 2: Planning and Configuring Enterprise Content Management

#### Lessons

- Planning Content Management
- Planning and Configuring eDiscovery
- Planning Records Management

#### Lab : Configuring eDiscovery in SharePoint Server 2013

- Creating and Configuring an eDiscovery Center
- Discovering and Preserving Content
- Querying and Exporting Content

#### Lab : Configuring Records Management in SharePoint Server 2013

- Configuring In-Place Records Management

### Module 3: Developing a Governance Plan

#### Lessons

- Introduction to Governance Planning
- Key Elements of a Governance Plan
- Planning for Governance in SharePoint Server 2013
- Implementing Governance in SharePoint 2013

#### Lab : Developing a Plan for Governance

- Creating a Governance Plan

#### Lab : Managing Site Creation and Deletion

- Creating and Publishing Site Policies
- Enabling and Managing Self-Service Site Creation