

Microsoft SharePoint Document Management



Course Details

Course Name Microsoft SharePoint Document Management

Duration 2 Days

Course Code AFBSPDM

Assumed Knowledge Basic understanding of SharePoint and Microsoft 365

Course Aims

The two-day SharePoint Document Management Course is crafted to instruct delegates in building adaptable document libraries that suit various organizational needs. The course emphasizes hands-on learning, providing essential skills for organizing, governing, and optimizing document repositories within SharePoint. Delegates will gain proficiency in utilizing and managing SharePoint Document Management features, enabling them to implement effective and tailored document management solutions across diverse organizational functions.

What You Will Learn

Delegates will gain insights into governing document repositories, understanding permissions, and ensuring compliance with organizational policies. Additionally, the course includes hands-on experience utilizing SharePoint Document Management features such as check-in/check-out, co-authoring, and workflow integration. By the end of the course, users will be proficient in building, customizing, and effectively managing document libraries.

Skills

- You will understand the key architectural decisions in making a Microsoft SharePoint Document Management Solution.
- The course will go into depth explaining how to set up, manage and govern Document Libraries and showcase all the key tools and features.
- You will also be made aware of best practices and use cases to take advantage of SharePoint Document Libraries fully.

Target Audience

The target audience includes individuals responsible for document governance, setup, and utilization of libraries in SharePoint. This course is ideal for document managers, administrators, information officers, and anyone involved in establishing effective document management strategies. However, this course can be used for beginners and end users wanting to learn more about what the technology can do which can improve adoption, migrations and building core understanding of the technology.

Course Content

Module 1 - What is SharePoint

- Topic A What is Microsoft 365
- Topic B What is SharePoint
- Topic C OneDrive vs. SharePoint
- Topic D Accessing SharePoint Online
- Topic E Core Elements of a SharePoint Site
- Topic F Roles and Responsibilities in SharePoint
- Topic H Governance & Strategy Overview

Module 2 - Document Management for End Users

- Topic A What is Document Libraries
- Topic B Creating Document Libraries
- Topic C Uploading Files
- Topic D Viewing Files
- Topic E Editing Files
- Topic F Creating Files
- Topic G Edit Properties
- Topic H Co-Authoring Files
- Topic I Deleting and Restore Files
- Topic J Searching for Files

Module 3 - Primary Document Management Features

- Topic A Check in and Check Out
- Topic B Versioning
- Topic C Columns and Metadata
- Topic D Content Approval
- Topic E Sync
- Topic F Pinning Documents
- Topic G Move
- Topic H Copy

Module 4 – Content Types, Folders and Templates

- Topic A Document Templates
- Topic B Content Types
- Topic C Folders
- Topic D Document Sets

Module 5 – Taxonomy & Metadata

- Topic A What is Taxonomy and Metadata
- Topic B Managing the SharePoint Term Store
- Topic C Apply and using Managed Metadata

Module 6 - Managing and using views in a Document Library

- Topic A Using Views
- Topic B Sorting, Filtering and Grouping
- Topic C Editing Views
- Topic D Creating Views
- Topic E Formatting of Views & Columns
- Topic F Deleting Views

Module 7 – Permissions

- Topic A Overview of SharePoint Permissions
- Topic B Managing Security Groups
- Topic C Managing SharePoint Permission Levels
- Topic D Permissions Inheritance
- Topic E Creating Unique Permissions
- Topic F Collaboration and Sharing Files

Module 8 - Applying Automation to Document Libraries

- Topic A Introduction to Power Automate
- Topic B Document Management Triggers and Actions
- Topic C Building a Document Management Workflow
- Topic D Using the Library Alerts

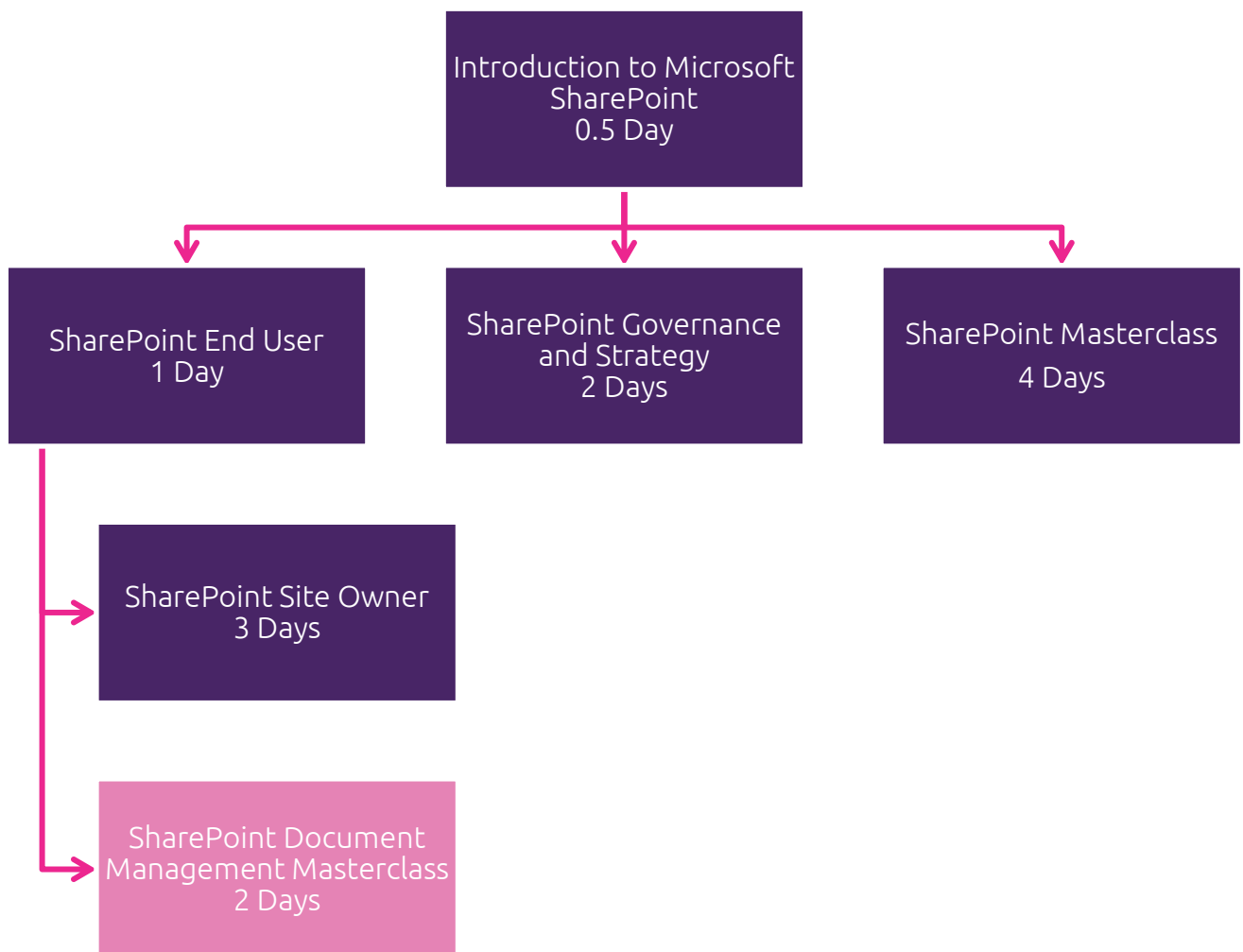
Module 9 - Security and Compliance

- Topic A What is Security and Compliance
- Topic B Document Retention Policies
- Topic C Document Sensitivity Labels

Course Progression

At Appetite, we understand the significance of Microsoft SharePoint in modern workplace collaboration. That's why we are excited to introduce our Microsoft SharePoint Document Management training course, designed to empower employees with the essential knowledge and skills needed to use, manage and govern Document Management in SharePoint. We believe in continuous growth and learning, which is why we're committed to offering ongoing training opportunities.

After this course, you will understand the power of Microsoft SharePoint and can embark with us on a journey of continuous development, ensuring that you stay at the forefront of workplace innovation. Join us to unlock the full potential of Microsoft SharePoint and advance your career in the digital era by taking one of the following courses.



About Appetite

Audacious, Human, Purposeful, Rigorous, Kind

Our company values underpin everything we do and are at the heart of our business.

Established in 2016, Appetite is passionate about helping people and organisations use technology as a force for good with values and culture being a guiding force for how we achieve this.







We will help you engage with your colleagues and customers through technology and our people – our difference makers – will be pivotal in helping you to achieve this.

We help companies to simplify technology and get the most out of Microsoft Cloud technologies to grow. We provide easier to access data analytics, faster business processes, better workflows and productivity, and a better understanding of how your business is performing.

Appetite for Business is a proud **Microsoft Gold Partner** and **Learning and Performance Institute Gold Partner**.

Accreditation

We adhere to several elite standards giving you the confidence that you are working with a partner who strives to be the very best, by continuously improving our management system and processes we work to the highest possible standard.

Security	Accreditations	Pledges
   	Microsoft Partner Gold Cloud Productivity  Certified  Corporation 