SharePoint: Document Management
Beginner level

Duration: 3 hours

Prerequisites:
- Web browser
- Microsoft 365 account

Teaching methods:
- Remote training
- Demonstration
- Training materials included

Certificate upon completion: yes

Target audience: Professionals, users and contributors who want to manage, share and sync documents in SharePoint, OneDrive and Teams.

Skills acquired upon completion:
- Choosing the right space: OneDrive, SharePoint or Teams
- Navigate a SharePoint site and library
- Create, organize and find documents
- Share files and collaborate securely

DESCRIPTION

In this hands-on course, learn to master secure sharing, co-authoring and access management so you can collaborate effectively without losing control of your files. Make the most of version history, recover deleted documents and sync your libraries to keep working even offline. By the end of the course, you will have simple, practical habits to save time and secure your day-to-day document management.

COURSE OUTLINE

Part One

1. Choosing the Right Workspace
- Understanding the role of OneDrive for personal work
- Understanding the role of SharePoint for shared content
- Using Teams to collaborate on documents

2. Navigating SharePoint
- Accessing the SharePoint start page and sites
- Finding and managing your favorite sites
- Using the search bar
- Using the site navigation menu
- Viewing site contents
- Accessing document libraries

3. Managing Documents in a Library
- Creating or uploading a document
- Creating folders and organizing files
- Renaming, moving and copying documents
- Sorting and filtering content
- Co-authoring a document with several people
- Sharing folders and documents securely
- Understanding link types and sharing options
- Managing who has access to content
- Viewing version history
- Restoring a previous version
- Recovering a deleted document from the recycle bin

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Part Two

1. Sharing and Collaborating Securely
- Distinguishing internal from external sharing
- Changing or removing access to a document
- Collaborating simultaneously in a document

2. Versions and Recovery
- Viewing the available versions of a document
- Restoring a previous version while keeping an audit trail
- Recovering a document from the SharePoint recycle bin

3. Syncing and Working Offline
- Syncing a SharePoint library
- Accessing files in File Explorer
- Understanding sync statuses and icons
- Working offline and telling syncing apart from OneDrive shortcuts

4. Hands-On Practice
- Choosing the appropriate space for different document scenarios
- Sharing, syncing and recovering a document

5. General Conclusion
- Recap of everyday habits to keep
- Discussion of the team's specific cases

QUESTIONS AND ANSWERS