MICROSOFT SHAREPOINT: ORGANIZING AND MANAGING DOCUMENTS EFFECTIVELY

LEVEL	DURATION	DELIVERY
beginner intermediate	2 hours	virtual

In this SharePoint Document Management and Organization training, we begin by exploring the fundamentals of document libraries and how to structure SharePoint for success. Participants will gain hands-on experience in creating folders and understanding the principles behind effective document naming. We'll also delve into version control, search functionalities, and custom views, so attendees can quickly locate and manage files. Throughout the training, we emphasize best practices and real-world scenarios, equipping participants with the skills to not only maintain a well-organized SharePoint library but also support seamless collaboration across teams.

COURSE OVERVIEW

COURSE OUTCOMES

- Understand the fundamentals of SharePoint document libraries and how they support document organization
- Learn best practices for organizing, categorizing, and managing documents in SharePoint.
- Explore features to enhance document searchability, version control, and collaboration.
- Create and apply custom metadata tags to improve document searchability and organization.
- Set up notifications for document updates and maintain document accuracy.
- Utilize SharePoint's search and filter tools to locate documents quickly.
- Manage sharing settings and permissions to ensure secure document access.
- Maintain an organized library by regularly reviewing, archiving, and updating documents.
- Apply strategies to avoid common document management pitfalls, ensuring long-term efficiency.

BUSINESS NEED

Did you know that office workers can spend up to 25% of their day searching for documents, data, or records? Effective use of SharePoint is essential for reducing wasted time and improving productivity.

COURSE DETAILS

Delivery Methods

Virtual: 30 participants

FIELD OF STUDY:
Productivity and Efficiency

COURSE LEVEL:
beginner intermediate

LEARNING METHODS:
exercises activities
interactive discussion

EQUIPMENT:
CI's virtual platform

SUGGESTED PREREQUISITES:
None

RECOMMENDED FOLLOW-UP:
Productivity and Efficiency Basic