# Microsoft SharePoint Online
## Document Management
### $350+GST per person | Maximum 4 in the class

This course is essential for anyone who works with documents in SharePoint Online. This course teaches learners how to effectively manage documents using SharePoint including version control, document alerts, creating view, flows, uploading, downloading, checking in and checking out documents, restoring earlier versions, sharing, and managing who can access documents and more.

## Course Content

- **MAGNIFICATION & VIEWS**
- **REFRESH & NAVIGATION**
- **THE NAVIGATION PANE**
- **SCREEN ELEMENTS**
  - Select A Folder, File or All
  - Views, Filtering, Document Details & Full Screen
  - Document Details
  - Add Columns For File Metadata
- **SHARE A FILE OR FOLDER**
  - Share An Item
  - Remove Access to a Shared Item
  - View All Items Shared With External Users
  - Share A Link To A File Or Folder
- **SHOW ACTIONS**
- **OPENING THE FILE IN BROWER, APP OR IMMERSIVE READER**
  - Set The Web Or Desktop App As Default
  - Choose The Web Or Desktop App
- **PIN A FILE OR FOLDER TO THE TOP**
- **COLLABORATE IN REAL TIME IN OFFICE DOCUMENTS**
- **DOWNLOAD A DOCUMENT**
  - Protected View
  - Comments
  - Word Comments
  - Excel Comments
  - PowerPoint Comments
  - Add A Comment To Non-Microsoft Files
- **EDITING DOCUMENTS IN SHAREPOINT**
- **CHECKOUT A DOCUMENT FOR OFFLINE WORK**
- **COPY FILE**
- **DRAG AND DROP TO MOVE**
- **UPLOAD FILES TO A DOCUMENT LIBRARY**
- **DRAG AND DROP TO UPLOAD**
  - Document Version History
  - Enable Version History in a Document Library
  - Restore A File Version
- **VERSION CONTROL**
  - What Is Version Control?
  - Why Is Version Control Important?
  - Aim
  - Version Control Options
  - File Naming Conventions
  - Version Numbers
  - Minor Revisions
  - Major Revisions
  - Version Control and Document Control Tables
  - Example Table Format
  - Where To Keep Your Version Control /Document Control Tables

- o   Best Practice Considerations
- o   Document Owner
- o   Keeping Draft Versions
- **ALERTS: GET NOTIFIED WHEN SOMEONE MAKES A CHANGE**
- **RECYCLE BIN AND SECOND STAGE RECYCLE BIN**
- **SYNC FILES WITH WINDOWS ONEDRIVE APP**
- **OPEN A SYNCED FILE IN THE WEB APP**
- **DOCUMENT LIBRARY SETTINGS MENU**
  - o   Site Contents
  - o   Site Usage
- **ENABLE DARK THEME IN SHAREPOINT**
- **CREATE A FOLDER OR FLAT VIEW**
- **DOCUMENT LIBRARY TEMPLATE MENU**
- **RUN A FLOW FOR A SELECTED FILE**

## The Importance of SharePoint Training

SharePoint is not simple file sharing and synchronizing of devices or a simple network drive. SharePoint was designed to be a completely independent ecosystem of components (web parts) to support business needs and enhance collaboration. It is a system that stands on its own but also interfaces with many other business applications.

SharePoint is not easy, for most users, it is a complicated piece of technology that completely changes what users know about content sharing and collaboration.

Users need to understand how to navigate around the site and what all the buttons on the ribbon do. They also need to be aware of the consequences of their actions in SharePoint, if they are given access to SharePoint we need to educate and raise their awareness of document security and integrity.

SharePoint gives power to users; they can do so much more than copy and paste documents. They can download a document, upload a document, check it out and check it back in, revert to the previous version control, promote the document for approval, share the document externally, and set alerts when a document or folder undergoes changes, and the list goes on.

SharePoint can do a great job enforcing a new or existing business process. That means process change for the users. If you enable the SharePoint document approval feature, your users will need to learn this process. Training is always a great time to reinforce why change is important and how SharePoint will help solve problems. New features require new training. Don't expect people to know about the "alerts" feature, just because the button appears right up there in the ribbon.

You won't let someone behind the wheel of the car who was not properly trained in driving, would you? So why would you put your users in charge of your company files and data without training?