

Document Management with Microsoft 365

Transform Information into a Strategic Business Asset

Many organisations struggle with disconnected file storage, inconsistent document management practices, duplicate content, and the growing challenge of finding and managing information across the business. Without effective governance, information becomes difficult to locate, compliance risks increase, and valuable organisational knowledge can be lost.

Document Management with Microsoft 365 is a practical, business-focused workshop designed to help organisations implement modern approaches to document management, information governance, records management, and knowledge sharing using Microsoft SharePoint Online.

Participants will gain a clear understanding of how to organise, manage, govern, and secure business information while improving collaboration, compliance, and information discovery across the organisation.

Target Audience

This course is ideal for:

- Business users
- Team leaders and managers
- SharePoint site owners
- Project coordinators
- Administrative professionals
- Records and information coordinators
- Compliance and governance teams
- Anyone responsible for managing business documents and information

Skill Level: Beginner to Intermediate

Business Outcomes

By the end of this course, participants will be able to:

- Understand the principles of modern document management
- Navigate and utilise SharePoint Online document libraries effectively
- Apply file governance and information management best practices
- Improve document discoverability through metadata and classification
- Understand records management concepts and retention requirements
- Create organised, compliant, and scalable information structures

- Support knowledge sharing and organisational learning
 - Contribute to stronger information governance across the organisation
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Program Content

Modern Document Management Fundamentals

Explore the principles of effective information management and the role document management plays in today's digital workplace.

Key Topics

- The business value of information
- Common document management challenges
- Moving beyond traditional file shares
- Understanding documents, records, and knowledge assets
- Information lifecycle management
- Introduction to governance and compliance

Business Outcome

Creates a foundation for consistent document management practices that improve efficiency, reduce risk, and support business growth.

SharePoint Online for Document Management

Learn how SharePoint Online provides a secure and collaborative platform for storing, managing, and sharing business information.

Key Topics

- Understanding SharePoint sites and document libraries
- Uploading, organising, and managing documents
- Document collaboration and co-authoring
- Version control and document history
- Permissions and access management
- Search and information discovery

Business Outcome

Improves collaboration while ensuring business information remains secure, accessible, and centrally managed.

File Governance and Information Architecture

Develop practical strategies for organising business content to improve consistency, usability, and compliance.

Key Topics

- Information architecture fundamentals
- Folder structures versus metadata
- Naming conventions and standards
- Managing duplicate content
- Ownership and accountability
- Security and access considerations
- Governance best practices

Business Outcome

Reduces information clutter, improves searchability, and creates a structured environment that supports business processes and compliance objectives.

Records Management and Compliance

Gain an understanding of records management principles and how they contribute to organisational compliance and risk management.

Key Topics

- Documents versus records
- Records lifecycle management
- Retention and disposal concepts
- Compliance considerations
- Managing business records in Microsoft 365
- Introduction to retention labels and policies
- Supporting audit and legal requirements

Business Outcome

Reduces compliance risk and helps organisations manage information according to regulatory and business requirements.

Knowledge Management and Information Discovery

Learn how organisations can capture, maintain, and share valuable knowledge to improve productivity and organisational capability.

Key Topics

- Building knowledge repositories
- Documenting business processes and procedures
- Improving information discoverability
- Leveraging metadata and search
- Sharing organisational knowledge
- Supporting onboarding and continuous learning
- Maintaining content quality and relevance

Business Outcome

Preserves organisational knowledge, improves employee productivity, and reduces reliance on individual knowledge holders.

Building a Governance Strategy for Success

Understand the people, process, and technology considerations required for sustainable document management.

Key Topics

- Establishing governance responsibilities
- User adoption strategies
- Maintaining quality information
- Managing ongoing compliance requirements
- Continuous improvement opportunities
- Creating a document management roadmap

Business Outcome

Provides organisations with a practical framework for maintaining effective document management practices over the long term.

Learning Approach

This highly practical workshop combines expert facilitation, live Microsoft 365 demonstrations, guided activities, group discussion, and workplace-based exercises. Participants apply document management techniques to realistic scenarios, review their current information practices, and develop approaches that can be implemented immediately in their day-to-day work.

- Practical demonstrations using SharePoint Online and Microsoft 365 document management tools
- Guided, hands-on activities that reinforce key information management techniques
- Real-world examples relevant to modern document, records, and knowledge management challenges
- Opportunities to review current document management practices and identify improvements
- A personalised action plan to support sustained improvements after the course

Included with the Program

Participants receive practical resources designed to reinforce learning and support ongoing application in the workplace:

- Comprehensive participant workbook and course notes
- Practical document management checklists and quick-reference guides
- Step-by-step SharePoint Online and Microsoft 365 document management tips
- Templates for naming conventions, metadata planning, governance responsibilities, retention considerations, and knowledge sharing
- A personalised 30-day document management improvement plan
- Certificate of attendance

Delivery Options

Course: Document Management with Microsoft 365

Duration: 4 Hours

Cost: \$450+GST per person

Delivery: Classroom or Virtual Instructor-Led Training

Level: Beginner to Intermediate

Audience: Business Professionals, Managers, Team Leaders, SharePoint Site Owners, Project Coordinators, Administrative Professionals, Records and Information Coordinators, and Compliance and Governance Teams

Business Benefits

Organisations that establish strong document management practices can achieve:

- Improved information governance
- Better document discovery and retrieval
- Increased productivity and collaboration
- Reduced information duplication
- Stronger compliance and risk management
- Better protection of organisational knowledge
- Improved records management practices
- Greater return on investment from Microsoft 365 and SharePoint Online

Software Solutions

Maximise the Value of Your Organisational Knowledge

Effective document management is about more than storing files. It is about ensuring employees can access trusted information, collaborate efficiently, meet compliance obligations, and preserve valuable organisational knowledge.

Document Management with Microsoft 365 provides the practical skills and governance knowledge needed to create a more organised, compliant, and productive digital workplace.