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# SharePoint Knowledge Management and Collaboration Course

6 – 10 September 2027
Barcelona

# SharePoint Knowledge Management and Collaboration Course

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SharePoint Knowledge Management and Collaboration is a 1-week training course for administrators, secretaries and team coordinators who look after shared files and team spaces, and it produces a Team Site Information Architecture Blueprint for one department. Hybrid working, rising document volumes and audit requests mean that files saved in personal folders and email threads now slow every team down. Jupiter Prime Training runs this course for the people who keep departmental knowledge findable.

## Why SharePoint Knowledge Management and Collaboration Matters Now

Three shifts make the department's shared workspace a daily concern. Teams now work across office, home and travel, so a single trusted place for current documents replaces the shared drive and the inbox. Files multiply quickly, and without metadata, versioning and sensible permissions colleagues reopen outdated drafts or overshare sensitive material. Leaders also expect quick answers during audits and handovers. A department with a tidy site structure saves hours of searching and avoids errors; one without it duplicates effort. ISO 30401 Knowledge Management Systems Requirements frames the site as part of a managed knowledge system rather than a file dump.

## Who Gains Most from SharePoint Knowledge Management and Collaboration

- Coordinators who set up and maintain departmental team sites and pages
- Administrators responsible for document libraries, folders and naming conventions
- Secretaries who manage meeting papers, approvals and executive correspondence files
- Staff who grant and review access to shared content for colleagues and guests
- Coordinators who run trackers, request lists and simple approval flows

A department that sends its secretaries and coordinators together gains most, because they can agree one library structure and one set of metadata columns for everyone.

## SharePoint Knowledge Management and Collaboration Capabilities

Participants leave able to turn a cluttered shared drive into a site where colleagues find the right version on the first search.

- Design a team site and page layout that matches how the department works — department heads
- Build document libraries with content types, metadata columns and views — everyday file users
- Specify permission groups and sharing rules that protect sensitive files — information security contacts
- Apply version history, check-out and retention labels to controlled documents — auditors and approvers
- Build lists and simple approval flows for requests and trackers — coordinators and managers
- Communicate search tips and Teams channel links so colleagues reuse content — the wider department

## Key SharePoint Knowledge Management and Collaboration Terms

- Team site — A shared workspace for a group, holding pages, libraries and lists, usually linked to a Teams team.
- Document library — A container for files with columns, views, version history and its own permissions.
- Metadata column — A field such as client, document type or status that describes a file and powers filtering and search.
- Content type — A reusable definition of a document kind, bundling its template and required metadata.
- Permission inheritance — The default whereby libraries and folders take access rights from their parent site unless broken deliberately.
- Version history — The record of each saved change to a file, allowing comparison and restoring earlier versions.

## SharePoint Knowledge Management and Collaboration Day by Day

## Day 1: From Shared Drives to Team Sites

- Shared Drive and Inbox Clutter Audit — Where Departmental Files Hide Today
- Hybrid Working File Patterns — Office, Home and Mobile Access Needs
- ISO 30401 View of a Site — Knowledge System Versus File Store
- Team Site Versus Communication Site Choice — Matching Audience and Purpose
- Hub and Navigation Sketch — Linking Departmental Sites Logically

## Day 2: Libraries, Metadata and Content Types

- Library Versus Folder Decision Rules — Avoiding Deep Folder Trees
- Metadata Column Design — Choice, Date and Managed Term Fields
- Content Types for Recurring Documents — Contracts, Minutes and Reports
- Views, Filters and Grouping — Showing Each Role What It Needs
- File Naming and Upload Conventions — Consistent Titles Across Teams

## Day 3: Access, Versions and Retention

- Permission Group Model — Owners, Members and Visitors
- External Sharing and Guest Access Rules — Limiting Oversharing Risk
- Version History and Check-Out — Controlling Edits on Key Documents
- Retention Labels and Records Basics — Keeping or Disposing of Files
- Access Review Routine — Spotting Broken Inheritance and Stale Members

## Day 4: Lists, Flows, Search and Teams

- Lists for Requests and Trackers — Replacing Spreadsheets Emailed Around
- Simple Approval Flows — Leave, Purchase and Document Sign-Off Examples
- Search Tuning With Metadata — Refiners and Promoted Results
- Teams Channel and Site Linking — One Home for Chat and Files
- Page Web Parts for News and Quick Links — Surfacing Key Content

## Day 5: Practising the Site Blueprint

- Applied Library and Metadata Model — One Department From Scratch
- Applied Permission Matrix — Checking Who Sees Which Library
- Applied Migration Plan From Shared Drive — Sequencing the Move
- Site Owner Handbook and Training Notes — Keeping Colleagues Consistent
- Team Site Information Architecture Blueprint — Final Version

## Applying SharePoint Knowledge Management and Collaboration After the Course

- Rebuild one cluttered shared folder as a library with three metadata columns and a default view.
- Run an access review on the department site and correct broken inheritance and stale guest accounts.

## SharePoint Knowledge Management and Collaboration Questions FAQ

### What is SharePoint knowledge management and collaboration and why does it matter now?

It is the use of SharePoint sites, libraries, metadata and permissions to keep shared documents organised and findable. It matters now because hybrid teams rely on one trusted workspace, and growing file volumes make disorder costly.

### Which roles gain most from SharePoint knowledge management and collaboration?

Administrators, secretaries and team coordinators gain most. You benefit if you set up team sites, look after document libraries, manage meeting papers, grant access or run trackers and approvals for your department.

## How does SharePoint knowledge management and collaboration differ from a technical SharePoint administration course?

It focuses on organising content for people rather than configuring servers or tenants. The emphasis is on site structure, metadata, permissions and search from the viewpoint of the department that uses them daily.

## What do you bring back from SharePoint knowledge management and collaboration training?

You bring back a blueprint for one department's site. It sets out libraries, metadata, permission groups, lists and a plan for moving files from the old shared drive.

## SharePoint Knowledge Management and Collaboration: The Way Forward

The Team Site Information Architecture Blueprint first informs which shared drive folders move first and into which libraries. Site owners, coordinators and department heads use it to keep structure consistent as content grows. After the first migration, revisit which metadata columns colleagues actually filter by and trim any that nobody uses.