

Managing Files & Information in Microsoft 365

OVERVIEW

The **Managing Files & Information in Microsoft 365** course helps individuals and teams organise, store, and manage documents effectively across Microsoft 365.

Participants will learn how to work with files across OneDrive, SharePoint and Microsoft Teams, ensuring information is easy to find, share and maintain. The course addresses common challenges such as duplicate files, unclear storage locations, inconsistent naming, and inappropriate sharing practices.

Emphasis is placed on practical approaches to structuring files, improving accessibility, and supporting consistent ways of working. By applying these concepts, participants can reduce confusion, improve collaboration, and manage information more effectively.

LEARNING OUTCOMES

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

- Understand file storage options within Microsoft 365 and how they work together
- Distinguish between OneDrive, SharePoint, and Teams file storage
- Store and organise files in a logical and consistent way
- Apply effective naming conventions and folder structures
- Share files appropriately within and outside the organisation
- Avoid duplication and manage single sources of truth
- Access files across different Microsoft 365 applications
- Understand version history and manage file changes
- Apply best practices for managing and maintaining information

These outcomes support improved accessibility of information, reduced duplication, and more efficient collaboration across teams.

DURATION & DELIVERY

The duration of this course is typically **3–4 hours or 1 day**, depending on the level of depth and practical exercises included.

This course can be delivered in a range of formats to suit your team:

- **Onsite training** - delivered at your workplace
- **Live online training** - delivered virtually in real time
- **Hybrid delivery** - a combination of onsite and online participants for teams working across multiple locations

All training is delivered by experienced Microsoft 365 specialists with a focus on practical, real-world application.

PREREQUISITES

Participants should have a basic understanding of Microsoft 365 applications and general experience working with files and folders in a business environment.

COURSEWARE

Learning materials are available for purchase at the time of booking. These may include training materials, reference guides or supporting resources, depending on the course.

While Microsoft 365 platforms continue to evolve, the principles of effective file and information management remain consistent. Trainers will incorporate current features and organisational practices to ensure the training is relevant, practical, and aligned with how your team works.

MICROSOFT 365: MODERN WORKPLACE TRAINING PATHWAY

Our Microsoft 365 Modern Workplace training is designed to help individuals and teams work more efficiently, collaborate effectively, and get better value from the tools they use every day.

All courses can be delivered as outlined below, or we can customise a training program to ensure your team completes the exact topics they need in the timeframe that best suits your organisation.

MODERN WORKPLACE COURSES

- **Getting Started in Microsoft 365** – Build confidence using the core Microsoft 365 applications, including Outlook, OneDrive, Word, Excel, OneNote, and Teams. Ideal for new users or those requiring a strong foundation.
- **Working Smarter with Microsoft 365** – Improve personal productivity by managing email, organising work, structuring files, and building efficient daily workflows across Microsoft 365 applications.
- **Collaborating Effectively in Microsoft 365** – Transform how teams work together using Microsoft Teams, shared files, and real-time collaboration tools, with a focus on reducing reliance on email.
- **Managing Files & Information in Microsoft 365** – Learn how to organise, store, and manage documents across OneDrive and SharePoint to reduce duplication and improve accessibility.
- **Modern Work Habits with Microsoft 365** – Develop better ways of working by improving communication practices, managing meetings effectively, and using the right tools for the right tasks.
- **Managing Tasks & Work in Microsoft 365** – Use Microsoft Planner as a central tool to assign, track, and manage work across teams, improving accountability and visibility.
- **Using Copilot in Microsoft 365** – Leverage AI capabilities to enhance productivity across Microsoft 365 applications, including drafting content, summarising information, and analysing data.

COURSE DETAIL

Understanding File Management in Microsoft 365

- Overview of file storage in Microsoft 365
- Understanding how OneDrive, SharePoint, and Teams are connected
- Common challenges in managing files and information
- Moving from local storage to cloud-based environments

OneDrive vs SharePoint vs Teams

- Understanding personal vs shared storage
- When to use OneDrive
- When to use SharePoint
- How Teams uses SharePoint for file storage
- Choosing the right location for files

Organising Files Effectively

- Designing logical folder structures
- Applying consistent naming conventions
- Keeping file structures simple and scalable
- Organising information for easy retrieval

Working with Files Across Microsoft 365

- Accessing files through Teams, OneDrive, and SharePoint
- Opening and editing files in Word and Excel
- Understanding file locations and visibility
- Working across apps without losing track of files

Sharing Files Safely and Effectively

- Sharing files using links rather than attachments
- Understanding internal vs external sharing
- Managing access and permissions
- Avoiding over-sharing and maintaining control

Managing Versions and Avoiding Duplication

- Understanding version history
- Managing changes to documents
- Avoiding duplicate files
- Maintaining a single source of truth

Maintaining File Structures Over Time

- Keeping files organised as work evolves
- Managing outdated or unused files
- Supporting consistent team practices
- Improving long-term information management