

PRODUCT INFORMATION

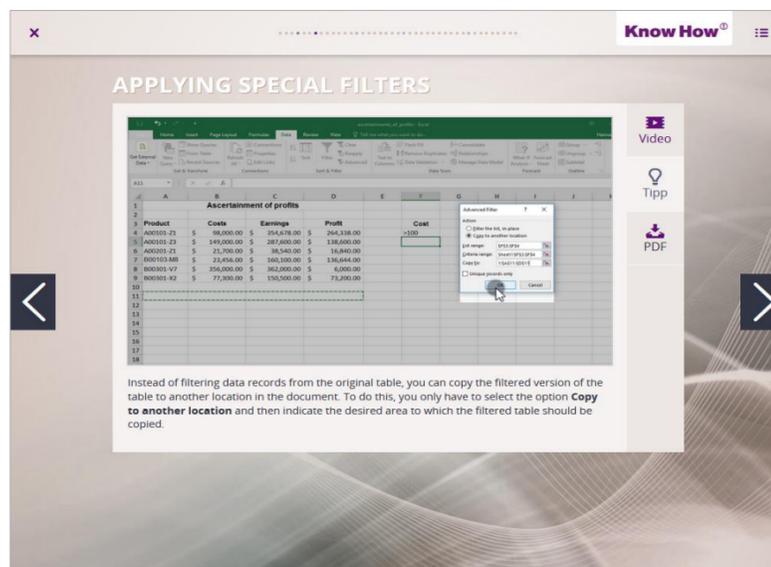
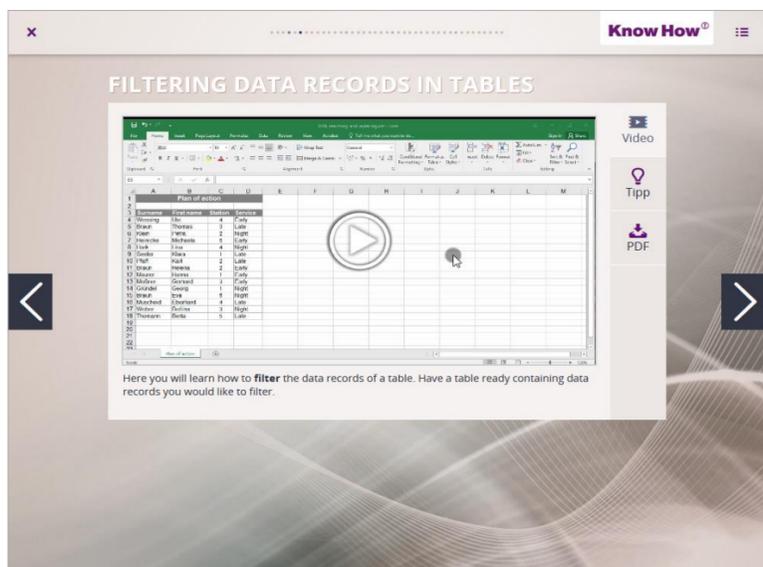
# DOCUMENT MANAGEMENT - USE CASE E-LEARNING

## WHAT DOES THIS COURSE OFFER YOU?

This E-Learning course is based on use-case scenarios dedicated to the topic of "Document Management" using Microsoft applications. The practical scenarios and valuable background information provided throughout the course help create an understanding of the use cases. Short video tutorials are given to illustrate how to use certain Microsoft applications for given use cases. Learners are provided with demonstrations and are asked to perform interactions for an engaging learning experience.

**Learning time:** 1,40 h

**Languages:** German, English



## Summary

Chapter	Section	Nuggets
Working with large documents in Word	Structuring documents	Formatting headings with styles
		Showing the navigation pane
		Searching for text in documents
		Navigating to pages with the navigation pane
	Creating a table of contents and cover sheet	Creating a table of contents
		Adding text to the table of contents
		Updating the table of contents
		Inserting a cover page
	Optimally using headers and footers	Adding a header
		Defining header of the first page differently
		Unlinking Headers and Footers
		Inserting headings with StyleRef in the header
		Displaying a heading in the header
		Inserting page numbers in the footer
	Jointly editing a Word document	Displaying the file name in the footer
Sharing a document from the desktop application		
Locally co-editing a document		
Locking a paragraph for editing		
Freigabe des Dokuments aufheben		
Working with large tables in Excel	Format as Table	Applying a table style
		Filtering data records in tables
		Applying special filters
		Filtering by colour
		Using a result row in a table
		Inserting slicers for filtering
		Filtering tables using slicers
	Using Power BI	Importing data from an Excel file into Power BI
		Creating a dashboard
		Creating a data set
		Creating a report
	Using a PivotTable	Analysing a report from Power BI in Excel
		Creating a pivot table
		Evaluating data with the help of PivotFields
		Adding a global filter
Adding a filter to a column heading		
Rearranging fields		
Defining the calculation function		

		Displaying report filter pages
		Creating a PivotChart
	Using Sparklines	Adding Sparklines
		Formatting sparklines
		Sparklines: Showing the high point and low point
		Sparklines: Showing the axes
		Using the Win/Loss sparkline type
		Deleting a Sparkline
Managing and controlling documents in SharePoint	Using categories for documents	Adding a new metadata column to the library
		Categorizing a document with metadata
		Changing a category
	Template management	Customising a template
		Allow site content type
		Create a site content type
		Assigning a document to a site content type
		Assigning a site content type to a library
		Customising a template
	Using a document set	Preparing a document folder
		Creating a document set
		Filling a document set with documents
		Deleting a file from the document set
	Using workflows efficiently	Creating a permission workflow
		Starting an approval workflow
		Approval workflow: Approving a request
		Preparing a list for a three-state workflow
		Creating a Three-State Workflow
		Three-state workflow: Creating a new task
		Three-state workflow: Updating task status
	Blocking or deleting a workflow	
	Settings for libraries	Configuring a version history
		Requiring the checking out of a document
Displaying the checked-out documents of all users		
Navigation elements: Changing the name and order		
<b>3 Chapters</b>	<b>13 Sections</b>	<b>70 Nuggets</b>