Microsoft Office and Office 365 Training Course Outlines

theofficebox.com.au

The courses lists are all 1 or 2 hour sessions designed to be delivered by an instructor to small groups. Each course is designed to improve efficiency and productivity by focussing on a scenario based example – there's a targeted outcome that is based around a typical work process.

Power BI 1 – Create your first dashboard

GOAL
This introductory course is targeted at business users who want to take their data visualisation skills to the next level using the Power BI service. If you're currently using Excel to produce reports and visualise data then this 1 hour course will walk you through the basics of creating online, interactive dashboards and reports.

OUTCOME
By the end of the course you will have connected an Excel data source to the Power BI service, created report visualisations, and set up and shared a dashboard on powerbi.com.

DURATION
1 hour.

TOPICS

POWER BI SERVICE OVERVIEW
- What is Microsoft Power BI?
- How much does it cost?
- How does the service improve on current reporting techniques

CONNECTING TO THE POWER BI SERVICE
- Logging on to powerbi.com
- Connecting an Excel data source to Power BI
- Understanding data sources and refresh

UNDERSTANDING THE POWER BI INTERFACE
- The differences between data, reports and dashboards
- A tour of the key elements of powerbi.com

CREATING REPORT VISUALISATIONS
- Editing report options
- Building a report using a number of available built in visualisations
- Formatting visualisations
- Cross-filtering visualisations
- Saving a report
- Adding report pages
- Adding headings and logos to report pages

CREATING A DASHBOARD
- Pinning report visualisations into a dashboard
- Navigating the dashboard layer
- Using quick insights
- Adding tiles
- Using Q and A
- Sharing a dashboard
- Conclusion and
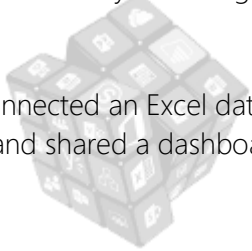
Power BI 2 – Getting started with the Power BI Desktop

GOAL

The purpose of the second course in the Power BI series is to understand the Power BI Desktop application and how it is used to create Power BI dashboards from multiple, and more complex data sources.

OUTCOME

By the end of the course you will understand the difference between the types of data sources that work in powerbi.com and when your data analysis requirements mean you need to use The Power BI Desktop. You will create a dashboard in this session where you build visualisations that are created by combining data from multiple sources. Once your report is complete you will upload the report and build a dashboard on pwerbi.com.

DURATION

1 hour.

TOPICS

POWER BI DESKTOP OVERVIEW

- What's the difference between PowerBI.com and The Power BI Desktop
- Downloading the Power BI Desktop
- How to download
- Frequency of updates
- How to update

CREATING A POWER BI DESKTOP REPORT

- Viewing the example source data
- Opening the Power BI Desktop and touring the interface
- Connecting to the data source
- Building visualisations
- Four visualisations and a slicer
- Add titles and logos
- Saving the Power BI Desktop pbix file

ADDING A SECOND DATA SOURCE

- Understanding how data sources can be "joined"
- Importing a second data source
- Creating the relationship

FORMULAS USING DAX

- Introduction to formulas
- Creating a calculated column
- Creating a measure

PUBLISHING AND SHARING THE CONTENT

- Publishing the file to the powerbi.com
- Emailing the pbix file
- Embedding the content into any web page

POWER BI PUBLISHER FOR EXCEL

Power BI 3 – Working with Date Tables, Power Query and DAX

GOAL

The purpose of the third course in the Power BI series is to get a better understanding of how Power BI works with dates, and to start using the query editor to clean and transform data ready to use in report visualisations. The session will also include using DAX to create some commonly used data aggregations.

OUTCOME

By the end of the course you will understand how to work with the query editor so that difficult data can be modelled and visualised. You will also use Power BI's built in DAX formulas and see how to create your own DAX to define custom calculations on your data. Additionally you will be able to create visualisations that present data using your date grouping that is relevant to your organisation.

DURATION

1 hour.

TOPICS

CREATING A DATE TABLE
- Why do you need a date table?
- Setting up a date table from scratch
- Relating the date table to your fact table
- Creating date related visualisations
- Creating a date hierarchy

POWER QUERY OVERVIEW
- Why do you need a query engine?
- How the query editor works
- Navigating the query editor interface

SIMPLE QUERY EXAMPLE TO REORGANISE A DATA SOURCE
- Viewing the example source data
- Using the following data transforms
    o Remove unwanted rows and columns
    o Remove errors
    o Replace incorrect values
    o Rename columns
    o Filter unwanted records

EDITING AND REUSING QUERIES
- View the query code
- Copy query code between queries

DAX EXAMPLES
- Creating a calculated column to calculate % of total
- Use the basic SUM, COUNT, MIN and MAX expressions
- Use CALCULATE, COUNTROWS and FILTER to aggregate sub categories of your dataset
- Use TOTALMTD, TOTALQTD and TOTALYTD to calculate totals over time

Office 365 – OneDrive for Business – Store and share files

GOAL

The goal of this session is to introduce OneDrive for Business to business users who are moving to Office 365 and are going to use OneDrive for Business as a replacement for their existing "My Documents" type environment. Participants will see how OneDrive for Business improves file storage by using the Microsoft cloud to store, create, edit, co-author, access and share content from their OneDrive for Business library.

OUTCOME

By the end of the course participants will be able to use their OneDrive for Business libraries to create and store files in the cloud. The session will focus on ensuring attendees can mechanically use OneDrive for Business to perform file related actions as well as well as identifying common business scenarios where OneDrive for Business can improve current practices by enabling access from anywhere, sharing content and co-authoring.

DURATION

1 hour.

TOPICS

- What is OneDrive for Business?
- How the cloud improves business process by enabling sharing, co-authoring and access from anywhere
- Options for accessing OneDrive for Business – online and offline sync
- Tour of the interface
- Getting existing content into OneDrive
- Creating new files – using Office Online
- Editing and managing files
- Sharing files (and revoking access)
- Co-authoring files
- Working with file versions
- Accessing content shared with you by colleagues
- Accessing OneDrive for Business content from any device

Excel – Create or edit your first workbook

GOAL

This session assumes no prior knowledge of Excel and is ideal for those wishing to understand the basics concepts of creating or editing a simple Excel workbook.

OUTCOME

By the end of this session attendees will be able to open and edit a simple workbook. Attendees will understand the Excel's worksheet and workbook structure and create, update and delete content.

DURATION

1 hour.

TOPICS

- Navigate the Excel environment
- Create and save a workbook
- Enter, edit and delete text/numbers and dates
- Modify data alignment, row and column widths
- Insert, delete and move rows and columns
- Select and apply formats to cell content
- Cut, copy and paste content
- Add, delete and rename sheets
- Basic printing settings and options

Excel – Functions 1 – Basics

GOAL

If you have never used Excel's function and formula capabilities to perform calculations then this is the session for you.

OUTCOME

By the end of this session attendees will be able to create simple calculations using Excel's built in functions. Participants will then progress to create their own custom formulas to generate custom calculations. From the ground up there will be a focus on generating bulletproof formulas that are accurate and easy to maintain.

DURATION

1 hour.

TOPICS

At the end of this session you will be able to:

- Use the SUM, AVERAGE, COUNT, MIN and MAX functions
- Create a custom formula
- Understand Excel's order of operations
- Set relative and absolute references
- Function and formula shortcuts

Excel – Functions 2 – Conditional functions and lookups

GOAL

Following on the basic functions course, this session adds to your knowledge by extending capabilities to stipulate conditions around what to calculate – removing the need to manually process data. Another common task in Excel is the process of looking up specific values within a data set. This session looks at Excel's most frequently utilised lookup functions.

OUTCOME

By the end of this session attendees will be able to create functions that enable Excel to automate calculation where the result is conditional on stipulated cell values.

DURATION

1 hour.

TOPICS

- Use the IF function
- Stop using SUM and start using SUBTOTAL or AGGREGATE
- Use SUMIF, COUNTIF, SUMIFS, COUNTIFS and AVERAGEIFS
- Use VLOOKUP
- Use INDEX and MATCH
- Understand OFFSET
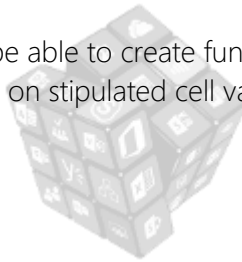
Excel – Functions 3 – Nesting functions, miscellaneous functions and error trapping

GOAL

To extend the capabilities of an Excel function to get the results you want you often need to "nest" one function inside another.

OUTCOME

By the end of this session attendees will be able to extract results based on more complex logical scenarios

DURATION

1 hour.

TOPICS

- Understand why and when you need to nest functions
- Nest multiple IF functions
- Use AND and OR functions
- Nest other functions within ERRORIF to prevent worksheet errors
- Nest the SUM function within the ROUND function
- Use a number of text functions

Excel – Visualise content with charts, sparklines and conditional formats

GOAL

Converting numbers into visually appealing and efficiently readable visualisations makes complex data more accessible and easier to consume.

OUTCOME

By the end of this session attendees will be able to visually represent data in a variety of meaningful and easy to understand visualisations

DURATION

1 hour.

TOPICS

- Create a chart
- Add and remove data from charts
- Apply chart formats
- Modify chart elements
- Insert Excel charts into other files
- Plot trends using sparklines
- Modify sparkline display options
- Apply conditional formats to data to easily identify characteristics within datasets
- Modify built in conditional formats
- Create custom conditional formats
- Locate and copy conditional formats

Excel – Analyse data with pivot tables

GOAL

Pivot tables are Excel's most powerful data analysis and data summary tools for two major reasons: they are easy to create and produce results quickly.

OUTCOME

By the end of this session attendees will be able to quickly create and summarise data in both tabular and visual form.

DURATION

1 or 2 hours.

TOPICS

- Identify an Excel list (and understand Excel tables)
- Create a pivot table
- Add pivot table elements to build a summary table
- Edit and rearrange pivot table items
- Set pivot table viewing options
- Group dates within a pivot table
- Create comparison data within a pivot table
- Combine multiple data sources in a single pivot table
- Use the GETPIVOTDATA function
- Create pivot charts
- Use filters and slicers

Excel – Organise worksheets using sort, filter, advanced filter and subtotal

GOAL

Excel is an amazing tool for analysing data. Sort and Filter are some of the most commonly used features to re-organise information.

OUTCOME

By the end of this session attendees will be able to reorder and isolate specific data matching their specified criteria.

DURATION

1 hour.

TOPICS

- Perform a basic sort
- Apply multiple sort criteria
- Create a custom sort
- Turn on and use the Auto Filter
- Sort and filter by colour
- Apply custom filters
- Set filter criteria and use Advanced Filter
- Apply subtotals to sorted lists

Excel – Power shortcuts

GOAL

For Excel novices and power users alike, this will be the best one hour session for those wanting to work faster and perform frequently used tasks more effectively. You might think you already know them all, but you don't!

OUTCOME

By the end of this session attendees will be able to perform a wide variety of everyday processing tasks using the "best, fastest technique" instead of "the way they've always done it".

DURATION

1 hour.

TOPICS

- Navigate workbooks and worksheets quickly
- Excel's top 5 shortcuts
- Understand Excel's double-click shortcuts
- Formula shortcuts
- Data entry shortcuts
- Quick Access Toolbar shortcuts
- Create charts
- Move content
- Edit content
- Use shortcuts to any command
- Work with Ctrl and Shift key shortcuts

Excel – Getting started with macros

GOAL

Creating macros gives you the opportunity to automate time consuming and repetitive tasks – you just need to start the macro and the instructed tasks are performed. There are virtually no limits to what macros can do. This one hour session introduces macros and outines what you can achieve to automate and speed up the processing of business as usual Excel tasks.

OUTCOME

By the end of this session attendees will be able to record a macro to automate a task or process and understand how to access and edit the code that is generated by the macro recorder.

DURATION

2 hours.

TOPICS

- Understand the potential of using macros and how they work
- Record a simple Excel macro
- View and understand the macro code
- See how different ways of recording macros produce slightly different results
- Get help to improve and generate better, more useful macros
- Know some of the pitfalls to avoid

Excel – Optimising workbook performance

GOAL

This session looks at some of the more common Excel workbook performance problems and how to solve them. The typical scenario is that Excel files are slow to open, slow to save, are too big to email or error when you try to perform normal activities such as inserting columns, accessing the file menu etc.

OUTCOME

By the end of this session attendees will be able to record a macro to automate a task or process and understand how to access and edit the code that is generated by the macro recorder.

DURATION

1 hour.

TOPICS

- Improve the performance of formulas in workbooks
- Understand how named ranges can help, hinder and be removed
- Deal with unwanted formats and conditional formats
- Remove unused ranges within a workbook
- Locate and remove unwanted links
- Change file formats to optimise size and performance

Excel – Ask us anything

This session is set up by request and is suited to individuals or teams with specific Microsoft Excel related training requirements or problems. Contact us for by phone on 0408 331 464 or via email at mark@theofficebox.com.au for more information.

Word – Power shortcuts

GOAL

You think you know Word – come and see the shortcuts you don't know and speed up document production and remove some of the daily frustrations experienced by any Word user.

OUTCOME

By the end of this session attendees will be able to perform frequently used actions in a faster more efficient manner.

DURATION

1 hour.

TOPICS

- Complete almost all everyday Word tasks more efficiently
- Select content efficiently
- Add and remove formats
- Use keyboard shortcuts
- Customise the Quick Access toolbar
- Email a document as a PDF with one click
- Drag table columns and bullet points to exactly where you want them
- Rearrange content quickly and easily
- Much, much, more…

Word – Create a mail merge

GOAL

Learn how to associate a data source with a Word document to generate mass mailouts and other document types. For example, if you have a list of clients and need to send them a personalised letter or email then this one hour session will guide you through the process.

OUTCOME

By the end of this session attendees will be able to create a single letter (email, envelope or label) to generate multiple, personalised letters and emails to addressees contained in a database or list..

DURATION

1 hour.

TOPICS

- Create and connect to a data list
- Use the mail merge wizard to create a merge
- Apply conditional merge options
- Understand merge output options – letter/envelope/labels
- Merge to email
- Limitations of the built in mail merge

Word – Use styles to simplify document management

GOAL

Word is a styles driven programme – everything is simple when you create styled documents. If your "Word life" is complicated then spend an hour to learn how to produce high quality documents that are easy to edit and easy to manage.

OUTCOME

By the end of this session attendees will be able to create, maintain and apply styles to new and existing documents.

DURATION

1 hour.

TOPICS

- Understand the benefits of Word styles
- Apply, modify and create styles
- Copy styles from one document to another
- Set style viewing/management settings
- Create a multi-level numbering style (that never breaks)
- Create a table of contents
- Create a cross reference

Word – Working with tables and tabs

GOAL

If you work with Word (and/or use documents that are created by others) then you will have battled with tables and tabs at some stage. This session guides you through everything you need to know to work with and manage tables and tabs.

OUTCOME

By the end of this session attendees will be able to edit and format tabular content using either tables or tabs. While working with tables is largely self-explanatory, knowing how to identify and work with tabs correctly will provide immediate improvements to the time required to edit documents using tabs.

DURATION

1 hour.

TOPICS

- Understand the difference between tables and tabs
- Insert a table into a document
- Add content to a table
- Format table content
- Using table styles
- Rearrange content
- Convert existing text into a table
- Sort table content
- Set table properties
- Add, rearrange and remove tabs using the ruler
- Add leader tabs

Word – Tracked changes, comparing documents and document protection

GOAL

Learn how to set up tracked changes within a document so that changes made by you (and others) are clearly visible and can be selectively accepted and rejected. The session also walks you through document protection options to prevent others making changes to document content.

OUTCOME

By the end of this session attendees will be able to review documents and work with tracked changes as well as take document versions and either compare one document with another or combine two documents into a single file.

DURATION

1 hour.

TOPICS

- Know how Word's review options work
- Turn tracked changes on and off
- Understand the various tracked changes display options
- Accept and reject changes
- Add and remove comments
- Navigate between comments and other review items
- Compare the contents of two documents
- Combine two documents into a single document
- Mark a document as final

Word - Create Templates in Word and PowerPoint

GOAL

This session outlines the process required to create templates in both Microsoft Word and PowerPoint so that templates are easy to use and work within organisational branding. The session is designed for template creators and administrators. A sound working knowledge of Word styles is assumed.

OUTCOME

By the end of this session attendees will be able to create reusable templates in both Word and PowerPoint.

DURATION

1 hour.

TOPICS

- Create a custom theme colour and theme fonts
- Create a Theme
- Assign themes to templates
- Use building blocks to improve document reusability
- Create and build a Word template
- Understand how to use PowerPoint's slide master
- Create and build a PowerPoint template

Word - Quick Parts: Building Blocks, Document Properties and Fields

GOAL

In this session you will learn how to create, use, edit and distribute "quick parts" – building blocks let you improve content re-usability, fields and document properties provide automatic document updates for items such as title, date as well as your own custom fields.

OUTCOME

By the end of this session attendees will be able to create reusable blocks of content to simplify the process of adding repeating content inside documents.

DURATION

1 hour.

TOPICS

At the end of this session you will be able to:

- Differentiate between the options in Word's Quick Parts menu and know when to best use each option
- Add items to the building blocks gallery
- Modify, move and delete building blocks
- Using Word fields
- Using AutoText
- Using AutoCorrect
- Editing and creating document properties
- Inserting document properties
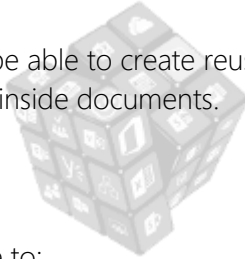
PowerPoint – Create your first presentation

GOAL

This session is designed for people with zero PowerPoint knowledge who want to be able to create simple presentations containing text and images.

OUTCOME

By the end of this session attendees will be able to create a simple, professional PowerPoint presentation including a variety of media.

DURATION

1 hour.

TOPICS

- Navigate the PowerPoint Environment
- Create and Save a PowerPoint Presentation
- Setup page and slide orientation
- Add new slides and set slide layout
- Rearrange slides
- Add text and apply formats
- Insert images onto slides
- View your presentation as a slide show
- Select presentation output options
- Print your presentation

PowerPoint – Inserting shapes, tables, charts, video and SmartArt

GOAL

Progressing knowledge from the "Create your first presentation" course, learn how to insert other graphical elements into your presentations.

OUTCOME

By the end of this session attendees will be able to improve the visual elements of the presentation using a wide variety of visual elements.

DURATION

1 hour.

TOPICS

- Insert then move, group and rearrange shapes
- Simplify the alignment of shapes and other objects
- Create a table inside your presentation
- Add a chart to your presentation
- Insert, edit and display video content
- Create powerful visualisations using SmartArt graphics
- Insert screenshots easily

PowerPoint – Transitions, animations and presentation options

GOAL

Transitions and animation add movement to your slides and can help make a PowerPoint presentation more dynamic, and help make information more memorable.
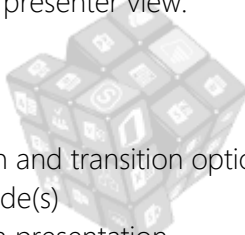
OUTCOME

By the end of this session attendees will be able to add motion elements to a PowerPoint presentation and work with PowerPoint's presenter view.

DURATION

1 hour.

TOPICS

- Understand the various animation and transition options
- Create and apply transitions to slide(s)
- Add three types of animation to a presentation
- Use timings on slide elements
- Adjust presentation options
- Set advanced presentation options
- Broadcast a slideshow over the Internet

Outlook – Productivity features

GOAL

This one hour session focusses specifically on Outlook features that specifically target productivity improvements.

OUTCOME

By the end of this session attendees will be able to perform frequently used Outlook actions both faster and in conjunction with Outlook's productivity enhancing automation features.

DURATION

1 hour.

TOPICS

- Ignore and cleanup options to automate the removal of unwanted email
- Turn on conversation view
- Create meetings fast
- Use quick steps to speed up processing and management of Outlook items
- Understand Categories
- Search quickly and easily
- Use virtual search folders
- Optimise the Outlook interface
- Insert screenshots into emails
- Overlay calendars
- Create calendar groups
- Use Outlook's best keyboard shortcuts

Outlook – Using the calendar, contacts, tasks and notes

GOAL

There's more to Outlook than just mail. Learn how to set up meetings, manage tasks, create contacts and save notes.

OUTCOME

By the end of this session attendees will be able to work effectively with Outlook's time and task management tools.
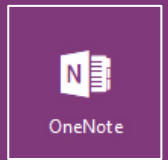
DURATION

1 hour.

TOPICS

- Create and manage your contact list
- Set up meetings, Skype for Business meetings and appointments
- Use flags and the task list
- Create post-it notes in Outlook

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OneNote – Create your first notebook

GOAL

OneNote is one of Microsoft Office's best kept secrets. This one hour session will walk you through how you can start using OneNote for note taking and throw away your pen and paper.

OUTCOME

By the end of this session attendees will be able to understand OneNote's interface and understand how OneNote is used to take and create a wide variety of digital notes.

DURATION

1 hour.

TOPICS

- Explore the OneNote Interface
- Create and save a notebook
- structure notebooks correctly
- Create sections and pages
- Enter and format notes
- Insert content – tables/images/recordings/screenshots
- Copy content into OneNote from other applications
- Reorganise content within or across notebooks
- Protect notebook content
- Search
- Copy text from an embedded image

OneNote – Managing meetings and collaboration

GOAL

One of OneNote's best features is its integration with other programs. This session shows you how to collaborate using OneNote and focusses on the example of how you can use OneNote and Outlook together to improve meeting effectiveness.

OUTCOME

By the end of this session attendees will be able to expand your knowledge to take advantage of the links between OneNote and Outlook so that you are able to create and collaborate on team notebooks in a work meeting scenario.

DURATION

1 hour.

TOPICS

- Understand the links between OneNote and Outlook
- Create an Outlook meeting including a link to a OneNote notebook
- Create a meeting page template
- Tag content (and create custom tags)
- Assign Outlook tasks based on OneNote content
- Distribute and export OneNote content

Skype for Business – Basic concepts – Presence, IM, voice calls and beyond

GOAL

This session is designed for users who have never used the Skype for Business environment and want to start experiencing the power of Microsoft's unified communications tool.
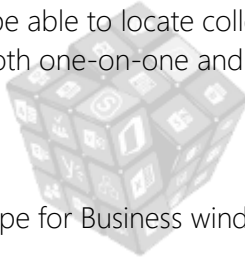
OUTCOME

By the end of this session attendees will be able to locate colleagues (and check their availability) then use IM, voice and video to create both one-on-one and group communication.

DURATION

1 hour.

TOPICS

- Understand and navigate the Skype for Business window
- Use presence
- Understand the integration between Skype for Business and other programs
- Find colleagues and add your own contacts and groups
- Start an instant message chat
- Start (or extend an IM chat) to a voice call
- Add and remove people into/from a call – conferencing
- Find previous conversations
- Extend the voice call to video
- Share your desktop
- Apply important Skype for Business settings

Skype for Business – Managing meetings, collaboration and sharing

GOAL

This session is designed for meeting organisers and extends on from the Skype for Business basic concepts session.
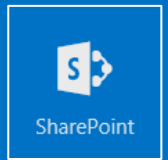
OUTCOME

By the end of this session attendees will be able to create ad hoc and scheduled meetings, work with Skype's presentation tools and record content.

DURATION

1 hour.

TOPICS

- Create a Skype for Business meeting
- Set up Skype for Business meeting options (and why they're important)
- Share your desktop or specific content
- Assign control of screen and navigate between shared content
- Use whiteboards and polls
- Record and distribute meeting content
- Get tips for successful Skype for Business meetings
- Use Skype for Business apps

SharePoint – Business User Basics

GOAL
Get an overview of what SharePoint is and how it can be used to improve business process and collaboration. This is a session that assumes no prior SharePoint knowledge.

OUTCOME
By the end of this session attendees will be able to navigate the SharePoint interface, work efficiently with document libraries and edit SharePoint web pages..

DURATION
2 hours.

TOPICS
- Articulate what SharePoint is and can be used for
- Navigate the SharePoint interface
- Co-author documents in a document library
- Create and add columns to lists and libraries
- Turn on versioning
- Understand how versioning works and how to publish versions
- Check-in/check-out files
- Share SharePoint content
- Use metadata search and filter
- Search
- Work with Views (and not folders)
- Add an alert to a document (and remove it!)
- Delete content
- Locate and use the recycle bin
- Create and locate web pages
- Edit web pages
- Insert and use web parts
- Add images and media to pages