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**Sample Custom Classes**  
for  
**Private Group Training**

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## Excel

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### Excel Fundamentals

#### Delivery

3-hour session  
Hands-on, instructor-led training

#### Overview

Master essential Excel skills to efficiently create, format, and navigate spreadsheets.

#### Course Outline

##### *Getting Started with Excel*

- Understanding the Excel interface
- Navigating worksheets and workbooks
- Using the Quick Access Toolbar

##### *Entering and Managing Data*

- Selecting cells and ranges effectively
- Entering and editing content
- Using AutoFill for data entry
- Working with worksheets

##### *Creating Basic Formulas*

- Building simple calculations
- Using basic functions (SUM, AVERAGE, COUNT)
- Understanding relative and absolute references
- Copying formulas with AutoFill

##### *Formatting Worksheets*

- Applying number formatting
- Changing fonts and alignment
- Adding borders and cell styles
- Adjusting column widths and row heights



### *Printing and Sharing*

- Setting print areas and page setup
  - Adding headers and footers
  - Creating PDF versions of worksheets
- 

## **Excel Data Analysis**

### **Delivery**

3-hour session

Hands-on with sample datasets

### **Overview**

Transform your data into actionable insights through sorting, filtering, and PivotTables.

### **Course Outline**

#### *Working with Tables*

- Creating and formatting tables
- Sorting and filtering data
- Using calculated columns
- Applying table styles and slicers

#### *PivotTable Fundamentals*

- Creating your first PivotTable
- Understanding PivotTable layouts
- Working with fields and summaries
- Refreshing and modifying PivotTables

#### *Enhanced PivotTable Techniques*

- Adding slicers for interactive filtering
- Grouping data (dates, numbers)
- Creating calculated fields
- Building PivotCharts



### *Conditional Formatting*

- Highlighting trends and patterns
- Creating data bars and color scales
- Setting up custom formatting rules
- Managing multiple rules

### *Subtotals and Data Analysis*

- Inserting automatic subtotals
- Creating custom data views
- Using Flash Fill for data transformation

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## **Excel Functions & Formulas Mastery**

### **Delivery**

3-hour intensive workshop  
Includes practice exercises

### **Overview**

Elevate your Excel skills with advanced functions that solve complex business problems.

### **Course Outline**

#### *Function Fundamentals*

- Working with the Function Library
- Nesting functions effectively
- Creating named ranges for formulas
- Troubleshooting formula errors

#### *Logical Functions*

- Building IF statements
- Using nested IF and IFS functions
- Combining AND, OR with IF
- Creating error-handling with IFERROR

### *Lookup and Reference*

- VLOOKUP for vertical searches
- HLOOKUP for horizontal data
- INDEX and MATCH combinations
- Advanced lookup techniques

### *Working with Text and Dates*

- Manipulating text with LEFT, RIGHT, MID
- Combining text with CONCAT
- Date calculations and formatting
- Using TODAY and date functions

### *Statistical and Math Functions*

- COUNTIF and SUMIF for conditions
- AVERAGEIF for conditional averages
- ROUND, ROUNDUP, ROUNDDOWN
- Statistical analysis functions

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## **Excel Dashboards & Visualization**

### **Delivery**

3-hour hands-on workshop  
Sample dashboard templates provided

### **Overview**

Create impactful visual representations of your data through charts, conditional formatting, and dashboard design.

### **Course Outline**

#### *Chart Fundamentals*

- Selecting the right chart type
- Creating and positioning charts
- Formatting chart elements



- Working with chart styles

#### *Advanced Chart Techniques*

- Combination charts with dual axes
- Creating sparklines for trend analysis
- Custom data labels and formatting
- Chart templates for consistency

#### *Dashboard Design Principles*

- Layout and organization strategies
- Creating interactive elements
- Building dynamic titles and captions
- Design for different audiences

#### *Conditional Formatting for Dashboards*

- Visual indicators and KPIs
- Custom icon sets and data bars
- Using formulas with conditional formatting
- Multi-level formatting rules

#### *Putting It All Together*

- Integrating charts, tables, and PivotTables
  - Creating a cohesive dashboard
  - Performance considerations
  - Publishing and sharing dashboards
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## Word

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### Word Essentials

#### Delivery

3-hour session

Hands-on, instructor-led training

#### Overview

Master the fundamentals of Microsoft Word to create, edit, and format professional documents efficiently.

#### Course Outline

##### *Getting Started with Word*

- Navigating the Word interface
- Understanding the Ribbon and Quick Access Toolbar
- Creating, opening, and saving documents
- Using keyboard shortcuts for efficiency

##### *Text Editing Techniques*

- Selecting and navigating text efficiently
- Cut, copy, and paste operations
- Using the Format Painter for consistency
- Finding and replacing text and formatting

##### *Applying Professional Formatting*

- Character formatting (font, size, style)
- Paragraph formatting (alignment, spacing, indents)
- Creating and modifying bulleted and numbered lists
- Applying borders and shading for emphasis

##### *Working with Styles*

- Understanding the power of styles
- Applying and modifying existing styles



- Creating custom styles for consistency
- Using style sets and themes

#### *Document Finalization*

- Checking spelling, grammar, and readability
- Working with headers and footers
- Previewing and printing documents
- Saving in different formats (PDF, etc.)

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## Word Tables and Graphics

### Delivery

3-hour session

Practice files provided

### Overview

Enhance your documents with professional-looking tables, images, and visual elements.

### Course Outline

#### *Creating and Managing Tables*

- Inserting and designing tables
- Adding, removing, and resizing rows and columns
- Merging and splitting cells for complex layouts
- Applying table styles and formatting

#### *Working with Table Data*

- Entering and editing table content
- Sorting table data
- Performing calculations in tables
- Converting text to tables and vice versa

#### *Integrating Graphics*

- Inserting and positioning images
- Applying picture styles and effects



- Working with text wrapping options
- Resizing and cropping images

#### *Drawing Tools and SmartArt*

- Creating and formatting shapes
- Using drawing tools for custom graphics
- Building SmartArt diagrams
- Converting text to SmartArt graphics

#### *Document Layout Considerations*

- Working with sections and breaks
- Creating columns for newsletter-style layouts
- Managing text flow around objects
- Positioning and aligning multiple elements

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## **Word Long Document Management**

### **Delivery**

3-hour session

Sample long documents provided

### **Overview**

Learn to create and manage professional long-form documents like reports, manuals, and theses with proper structure and navigation tools.

### **Course Outline**

#### *Document Organization*

- Planning document structure
- Working with sections and section breaks
- Managing headers and footers in different sections
- Creating effective cover pages

#### *Navigation and Reference Tools*

- Building a table of contents



- Creating and updating indexes
- Inserting cross-references
- Working with bookmarks and hyperlinks

#### *Citations and Bibliography*

- Adding citations in various formats
- Managing sources
- Creating and updating bibliographies
- Working with footnotes and endnotes

#### *Collaboration and Review*

- Using Track Changes effectively
- Adding and managing comments
- Comparing and combining document versions
- Setting document protection options

#### *Document Finalization*

- Creating professional page numbering
  - Adding watermarks and backgrounds
  - Generating ancillary tables (figures, tables)
  - Final document checking and preparation
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## Word Templates and Automation (90-Minute Session)

### Delivery

90-minute focused session  
Template examples included

### Overview

Save time and ensure consistency by creating reusable Word templates and automating repetitive tasks.

### Course Outline

#### *Template Fundamentals*

- Understanding the difference between documents and templates
- Creating a template from an existing document
- Setting up styles in templates
- Saving and accessing templates

#### *Building Blocks and Quick Parts*

- Creating reusable content with building blocks
- Working with Quick Parts
- Managing the Building Blocks Organizer
- Using AutoText for frequently used content

#### *Forms and Fields*

- Adding form controls to templates
- Working with content controls
- Creating fillable forms
- Protecting forms from editing

#### *Automating with Fields*

- Understanding field codes
- Inserting and updating fields
- Creating custom field calculations
- Using fields for dynamic content

## PowerPoint

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### PowerPoint Essentials

#### Delivery

3-hour session  
Hands-on, instructor-led training

#### Overview

Learn to create professional, effective presentations that engage your audience and enhance your message.

#### Course Outline

##### *PowerPoint Fundamentals*

- Navigating the PowerPoint interface
- Understanding slide layouts and views
- Working with the Quick Access Toolbar
- Building a presentation from scratch and templates

##### *Slide Creation and Management*

- Adding and organizing slides
- Working with text placeholders effectively
- Duplicating and rearranging slides
- Using slide sections to organize content

##### *Text Formatting and Organization*

- Applying and customizing text formatting
- Working with bullets and numbering
- Creating and formatting text boxes
- Using the Format Painter for consistency

##### *Basic Visual Elements*

- Adding images and basic shapes
- Applying picture styles and simple effects



- Inserting icons and SmartArt diagrams
- Working with basic slide layouts

#### *Presentation Delivery*

- Setting up slide transitions
- Running and navigating a slideshow
- Using presenter view effectively
- Printing slides, notes and handouts

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## **PowerPoint Design and Visual Impact**

### **Delivery**

3-hour session

Design examples provided

### **Overview**

Transform ordinary presentations into visually stunning content that captivates audiences through professional design techniques.

### **Course Outline**

#### *Working with Design Themes*

- Applying and customizing themes
- Managing color schemes effectively
- Working with font themes
- Creating custom themes for brand consistency

#### *Advanced Visual Elements*

- Creating and editing complex shapes
- Working with layered objects
- Using the eyedropper tool for color matching
- Advanced picture formatting techniques

#### *Enhancing with Multimedia*

- Inserting and trimming video content



- Working with audio elements
- Managing media playback options
- Optimizing media for performance

#### *Creating Custom Layouts*

- Working with and modifying slide masters
- Creating custom slide layouts
- Managing multiple slide masters
- Using guides and rulers for precise positioning

#### *Animation Techniques*

- Understanding animation principles
- Applying entrance, emphasis, and exit effects
- Creating custom animation paths
- Managing animation timing and triggers

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## **PowerPoint Data Visualization**

### **Delivery**

3-hour session

Sample data sets included

### **Overview**

Master the art of presenting data clearly and effectively through PowerPoint's visualization tools.

### **Course Outline**

#### *Creating Effective Charts*

- Selecting the right chart type for your data
- Building and formatting basic charts
- Customizing chart elements (axes, legends, labels)
- Using the chart design tools effectively





#### *Advanced Chart Techniques*

- Creating combination charts
- Working with trendlines and error bars
- Building and formatting sparklines
- Managing chart templates

#### *Data Integration from Excel*

- Importing Excel data into PowerPoint
- Linking vs. embedding Excel content
- Updating linked data automatically
- Creating charts from Excel data

#### *Tables and SmartArt for Data*

- Building and formatting tables effectively
- Converting text to SmartArt for visual impact
- Using SmartArt for process flows and hierarchies
- Creating custom data visualizations with shapes

#### *Dashboard-Style Slides*

- Designing effective dashboard layouts
- Creating visual KPIs and metrics
- Building interactive elements with hyperlinks
- Presenting complex data clearly and concisely

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## **PowerPoint Advanced Delivery Techniques (90-Minute Session)**

### **Delivery**

90-minute focused session  
Interactive examples provided

### **Overview**

Elevate your presentation delivery with advanced techniques that engage audiences and create memorable experiences.



## Course Outline

### *Interactive Presentations*

- Creating custom navigation with hyperlinks
- Building interactive menus
- Using action buttons effectively
- Designing non-linear presentations

### *Advanced Animation Strategies*

- Creating animation sequences for complex concepts
- Using motion paths for emphasis
- Timing animations with narration
- Building reveal effects for maximum impact

### *Presenter View Mastery*

- Customizing presenter view
  - Working with speaker notes effectively
  - Using the annotation tools during presentations
  - Managing presentation timing
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## Outlook

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### Outlook Email Management

#### Delivery

3-hour session

Hands-on, instructor-led training

#### Overview

Master Outlook's email features to organize your inbox, manage messages efficiently, and take control of your communications.

#### Course Outline

##### *Navigating the Outlook Interface*

- Understanding the Outlook layout and views
- Working with the folder pane, reading pane, and navigation bar
- Customizing the Quick Access Toolbar
- Accessing Outlook Help and resources

##### *Email Organization Strategies*

- Creating and managing folder structures
- Using Categories for visual organization
- Setting up Favorites for quick access
- Working with Focused/Other inbox views

##### *Message Management Techniques*

- Flagging messages for follow-up
- Creating and using Quick Steps for common actions
- Sorting and filtering messages effectively
- Using Search tools to find specific content

##### *Working with Message Content*

- Creating professional email messages
- Using formatting tools effectively



- Working with attachments and links
- Using @mentions to get attention

#### *Automating Email Management*

- Creating and managing Rules
- Setting up Automatic Replies
- Using Quick Parts for repetitive text
- Implementing Clean Up features for conversations

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## **Outlook Calendar Mastery**

### **Delivery**

3-hour session

Practice exercises included

### **Overview**

Leverage Outlook's calendar features to manage your time, schedule meetings effectively, and coordinate with colleagues.

### **Course Outline**

#### *Calendar Fundamentals*

- Navigating calendar views and layouts
- Creating and managing appointments
- Understanding event categories and status
- Setting reminders and recurrence patterns

#### *Meeting Management*

- Scheduling meetings with attendees
- Working with the Scheduling Assistant
- Managing meeting responses
- Updating and canceling meetings

#### *Calendar Customization*

- Setting calendar work hours and time zones



- Creating calendar groups for organization
- Using conditional formatting for visual cues
- Managing calendar options and preferences

#### *Calendar Sharing and Permissions*

- Sharing your calendar with colleagues
- Opening shared and public calendars
- Managing delegate access and permissions
- Creating calendar views with multiple calendars

#### *Calendar Planning Tools*

- Creating and managing multiple calendars
- Using categories for event organization
- Printing calendar views and options
- Integrating tasks with calendar management

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## **Outlook Contact and Task Management**

### **Delivery**

3-hour session

Sample databases provided

### **Overview**

Organize your contacts and tasks effectively to streamline your workflow and increase productivity.

### **Course Outline**

#### *Contact Management Fundamentals*

- Creating and organizing contacts
- Working with contact views and categories
- Using contact groups (distribution lists)
- Managing contact information effectively



#### *Advanced Contact Features*

- Working with business cards and contact pictures
- Importing and exporting contacts
- Sharing contacts with colleagues
- Using social connectors and linked contacts

#### *Task Management Basics*

- Creating and organizing tasks
- Setting due dates and reminders
- Assigning tasks to others
- Working with recurring tasks

#### *Task Management Strategies*

- Using categories for task organization
- Working with the To-Do Bar
- Managing task views and filters
- Integrating tasks with email and calendar

#### *Mobile Access and Synchronization*

- Accessing contacts and tasks on mobile devices
- Synchronizing across multiple platforms
- Setting up Outlook features for remote work
- Using Outlook Web Access for contacts and tasks

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## **Outlook Productivity Techniques (90-Minute Session)**

### **Delivery**

90-minute focused session  
Quick reference guide included

### **Overview**

Learn time-saving techniques and productivity hacks to maximize your efficiency with Outlook.



## Course Outline

### *Time-Saving Email Strategies*

- Using keyboard shortcuts effectively
- Implementing the 4D approach (Delete, Delegate, Defer, Do)
- Creating templates for common communications
- Managing email notifications and distractions

### *Quick Response Techniques*

- Using Quick Parts and AutoText
- Working with Quick Steps for multi-step actions
- Implementing Canned Responses
- Using voting buttons and polls

### *Search and Finding Mastery*

- Building advanced search queries
  - Creating and managing search folders
  - Using search operators and filters
  - Finding anything in Outlook quickly
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## Teams

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### Microsoft Teams Essentials

#### Delivery

3-hour session

Hands-on, instructor-led training

#### Overview

Learn the fundamentals of Microsoft Teams to enhance collaboration, communication, and productivity in your organization.

#### Course Outline

##### *Getting Started with Teams*

- Understanding the Teams interface and navigation
- Customizing Teams settings and notifications
- Working with the desktop, web, and mobile apps
- Configuring personal presence and status settings

##### *Team and Channel Management*

- Creating and joining teams
- Understanding team types and permissions
- Working with channels (standard, private, shared)
- Organizing teams and channels effectively

##### *Communication in Teams*

- Posting and formatting messages in channels
- Using @mentions to get attention
- Creating and managing conversations
- Working with announcements and important messages

##### *Files and Collaboration*

- Uploading and sharing files in Teams
- Managing documents within channels





- Co-authoring and editing documents in real-time
- Understanding file permissions and access

#### *Personal Communication*

- Managing private chats with individuals and groups
- Adding people to conversations
- Sharing files in private chats
- Using status and presence effectively

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## **Microsoft Teams Meetings and Calls**

### **Delivery**

3-hour session

Practice opportunities included

### **Overview**

Master Teams' meeting and calling capabilities to conduct effective virtual meetings, webinars, and collaborative sessions.

### **Course Outline**

#### *Meeting Fundamentals*

- Scheduling meetings in Teams and Outlook
- Setting meeting options and permissions
- Managing meeting invitations and responses
- Working with calendar integration

#### *Running Effective Meetings*

- Using meeting controls (mute, cameras, etc.)
- Sharing content and screens effectively
- Using backgrounds and visual effects
- Managing participants and roles

#### *Enhanced Meeting Features*

- Working with breakout rooms



- Creating and managing polls
- Using meeting notes and action items
- Recording meetings and managing recordings

#### *Presenting in Teams*

- Using PowerPoint Live in Teams
- Managing slide navigation and notes
- Working with laser pointer and annotations
- Co-presenting with multiple presenters

#### *Teams Calling Features*

- Making and receiving calls in Teams
- Managing call settings and options
- Transferring calls and creating call groups
- Using voicemail features and settings

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## **Teams Collaboration and App Integration**

### **Delivery**

3-hour session

Implementation examples provided

### **Overview**

Enhance your Teams environment with integrated apps and custom collaborative spaces that streamline workflows.

### **Course Outline**

#### *Customizing Team Environments*

- Adding tabs to channels for quick access
- Working with built-in tabs (Files, Wiki, etc.)
- Managing channel settings and features
- Creating effective team structures



#### *Working with Apps in Teams*

- Adding apps to teams and channels
- Using Microsoft apps within Teams (Forms, Lists, etc.)
- Managing app permissions and settings
- Finding and installing apps from the store

#### *Integrating Teams with Office 365*

- Working with SharePoint and Teams integration
- Using OneNote within Teams
- Managing OneDrive files in Teams
- Creating seamless workflows across applications

#### *Creating Custom Team Solutions*

- Building teams for specific projects or departments
- Setting up approval workflows
- Creating announcement systems
- Designing information hubs for teams

#### *Teams Mobile and Remote Work*

- Optimizing Teams for remote collaboration
- Using Teams effectively on mobile devices
- Managing notifications across devices
- Accessing files and information on the go

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### **Microsoft Teams Administration (90-Minute Session)**

#### **Delivery**

90-minute focused session  
Best practices guide included

#### **Overview**

Learn essential administration and governance techniques to effectively manage Teams in your organization.



## Course Outline

### *Teams Management Fundamentals*

- Understanding Teams admin roles
- Managing team creation and deletion
- Setting up naming conventions
- Implementing governance policies

### *Security and Compliance*

- Managing permissions and access
  - Setting up data retention policies
  - Working with private and sensitive information
  - Configuring external access and guest permissions
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## Sharepoint

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### SharePoint Document Management

#### Delivery

3-hour session

Hands-on, instructor-led training

#### Overview

Master SharePoint's document management capabilities to organize, store, and collaborate effectively on your organization's content.

#### Course Outline

##### *SharePoint Fundamentals*

- Navigating the SharePoint interface
- Understanding sites, libraries, and lists
- Working with the modern experience
- Accessing SharePoint through various methods

##### *Document Library Essentials*

- Creating and configuring document libraries
- Uploading and organizing files
- Using folders and views effectively
- Setting up document templates

##### *File Collaboration Techniques*

- Co-authoring documents in real-time
- Understanding version history and recovery
- Checking out and checking in documents
- Working with document properties and metadata

##### *Document Organization Strategies*

- Creating custom metadata columns
- Building and applying content types



- Setting up managed metadata
- Organizing documents with folders vs. metadata

#### *Sharing and Permissions*

- Understanding SharePoint permissions basics
- Sharing files and folders with colleagues
- Managing access to sensitive content
- Creating appropriate permission strategies

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## **SharePoint Lists and Business Processes**

### **Delivery**

3-hour session

Case studies and examples provided

### **Overview**

Leverage SharePoint lists to capture, track, and manage business information and processes efficiently.

### **Course Outline**

#### *List Fundamentals*

- Creating and configuring SharePoint lists
- Understanding list templates and use cases
- Working with list data and content
- Managing list settings and options

#### *Custom List Design*

- Creating custom columns and data types
- Implementing validation rules
- Designing forms for data entry
- Building calculated columns

#### *List Views and Organization*

- Creating and customizing list views



- Filtering and sorting list data
- Working with conditional formatting
- Using grouping for data organization

#### *Automating List Processes*

- Implementing list alerts and notifications
- Creating approval workflows
- Setting up automated emails
- Building basic automations with Power Automate

#### *Data Analysis with Lists*

- Exporting data to Excel
- Creating charts and visualizations
- Using the Quick Edit view for bulk updates
- Implementing filtering and searching

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## **SharePoint Site Design and Navigation**

### **Delivery**

3-hour session

Design examples provided

### **Overview**

Create effective SharePoint sites with intuitive navigation, engaging pages, and organized content structures.

### **Course Outline**

#### *Site Planning and Architecture*

- Understanding site collections and site hierarchies
- Planning effective information architecture
- Implementing hub sites for organization
- Creating logical site structures



#### *Page Design and Content*

- Building modern SharePoint pages
- Working with web parts and content layouts
- Creating news and announcement pages
- Designing visually appealing content

#### *Navigation Design*

- Configuring global navigation
- Setting up hub site navigation
- Creating custom navigation links
- Building intuitive site structures

#### *SharePoint Branding Elements*

- Applying themes and colors
- Working with logos and site icons
- Implementing consistent design elements
- Creating visual hierarchy

#### *Site Management*

- Managing site permissions and access
- Using site analytics and usage reports
- Implementing site policies
- Planning for site governance

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## **SharePoint and Teams Integration (90-Minute Session)**

### **Delivery**

90-minute focused session  
Integration examples included

### **Overview**

Understand how SharePoint and Teams work together to create a seamless collaboration experience across Microsoft 365.





## Course Outline

### *Understanding the Integration*

- How Teams uses SharePoint for file storage
- The relationship between channels and folders
- Accessing SharePoint from Teams
- Managing permissions across platforms

### *File Management Across Platforms*

- Working with files in Teams vs. SharePoint
- Synchronizing content with OneDrive
- Managing metadata in the Teams interface
- Using SharePoint features from within Teams

### *Enhanced Collaboration Scenarios*

- Creating tabs for SharePoint content in Teams
  - Building integrated workflows
  - Managing team sites effectively
  - Implementing best practices for cross-platform work
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## OneDrive

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### OneDrive Essentials

#### Delivery

3-hour session  
Hands-on, instructor-led training

#### Overview

Master OneDrive for Business to effectively store, sync, share, and collaborate on your files from anywhere.

#### Course Outline

##### *Getting Started with OneDrive*

- Understanding OneDrive for Business vs. personal OneDrive
- Navigating the OneDrive interface
- Accessing OneDrive from different devices and platforms
- Managing OneDrive settings and preferences

##### *File Management Fundamentals*

- Uploading and creating files in OneDrive
- Organizing content with folders and libraries
- Working with file views and sorting options
- Using search to locate content quickly

##### *Syncing and Offline Access*

- Setting up OneDrive sync on desktop computers
- Managing sync settings and preferences
- Working with files offline
- Handling sync conflicts and issues

##### *Sharing and Collaboration*

- Sharing files and folders securely
- Managing sharing permissions and links



- Collaborating in real-time on Office documents
- Understanding external sharing capabilities and limitations

#### *Mobile and Cross-Platform Access*

- Using OneDrive on mobile devices
- Accessing OneDrive content across platforms
- Managing notifications and settings
- Implementing mobile security features

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## **OneDrive Advanced Collaboration**

### **Delivery**

3-hour session

Collaboration scenarios included

### **Overview**

Take your OneDrive skills to the next level with advanced sharing, co-authoring, and integration with Microsoft 365 applications.

### **Course Outline**

#### *Advanced Sharing Strategies*

- Creating granular sharing permissions
- Using sharing links effectively (view, edit, block download)
- Managing access to sensitive content
- Implementing expiration dates and passwords for links

#### *File Request and Collection*

- Setting up file requests for document collection
- Managing submitted content
- Organizing received files
- Setting permissions on collected content

#### *Version History and File Recovery*

- Working with version history



- Restoring previous file versions
- Recovering deleted files from the recycle bin
- Setting up retention policies

#### *Co-Authoring and Real-Time Collaboration*

- Co-editing documents simultaneously
- Using comments and @mentions
- Tracking changes and contributions
- Managing notifications for collaborative work

#### *OneDrive Integration*

- Working with OneDrive from Office applications
- Integrating OneDrive with Teams
- Using OneDrive with SharePoint
- Creating seamless workflows across Microsoft 365

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## **OneDrive Security and Governance (90-Minute Session)**

### **Delivery**

90-minute focused session  
Best practices guide included

### **Overview**

Learn to implement security measures and governance policies for OneDrive content while balancing collaboration needs.

### **Course Outline**

#### *OneDrive Security Fundamentals*

- Understanding OneDrive security architecture
- Implementing multi-factor authentication
- Managing device access and restrictions
- Securing OneDrive content effectively



#### *Content Protection Features*

- Using sensitivity labels with OneDrive
- Implementing Information Rights Management
- Applying retention policies
- Preventing data loss with OneDrive

#### *Monitoring and Compliance*

- Auditing OneDrive activity
  - Managing compliance requirements
  - Using reporting features
  - Implementing eDiscovery for OneDrive content
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## OneNote

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### OneNote Essentials

#### Delivery

3-hour session

Hands-on, instructor-led training

#### Overview

Master Microsoft OneNote to create, organize, and share digital notes that enhance productivity and information management.

#### Course Outline

##### *Getting Started with OneNote*

- Understanding the OneNote interface and structure
- Navigating notebooks, sections, and pages
- Working with desktop, web, and mobile versions
- Setting up OneNote preferences

##### *Creating and Formatting Notes*

- Adding and editing text content
- Applying text formatting and styles
- Working with lists, tables, and indentation
- Using highlighting and emphasis tools

##### *Enhanced Note-Taking Features*

- Inserting images and screenshots
- Adding audio and video recordings
- Using drawing and inking tools
- Creating and using templates

##### *Content Organization Strategies*

- Creating effective notebook structures
- Designing logical section groups and sections



- Building hierarchical page systems
- Using page templates for consistency

#### *Search and Reference Features*

- Finding content with search tools
- Working with tags and tagging systems
- Creating internal links and references
- Using the OneNote page history feature

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## **OneNote Advanced Features**

### **Delivery**

3-hour session

Implementation examples provided

### **Overview**

Take your OneNote skills to the next level with advanced organization, integration, and collaboration techniques.

### **Course Outline**

#### *Embedding and Attachments*

- Working with file attachments
- Embedding Excel spreadsheets
- Inserting PDF printouts
- Managing embedded content effectively

#### *Integration with Other Applications*

- Working with Outlook tasks and emails
- Integrating with Microsoft Teams
- Linking to SharePoint and OneDrive content
- Using OneNote with other Microsoft 365 apps

#### *Collaboration with OneNote*

- Sharing notebooks with colleagues



- Managing permissions and access
- Using page versions and history
- Working with multi-author editing

#### *Organization and Productivity Systems*

- Implementing project management in OneNote
- Creating action item and follow-up systems
- Building knowledge bases and references
- Setting up meeting and note templates

#### *Advanced Search and Navigation*

- Using advanced search operators
- Creating custom search strategies
- Building table of contents and indexes
- Working with cross-notebook references

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## **OneNote Quick Start (90-Minute Session)**

### **Delivery**

90-minute focused session  
Quick reference guide included

### **Overview**

A concentrated introduction to OneNote essentials for busy professionals who need to get up to speed quickly.

### **Course Outline**

#### *OneNote Foundations*

- Getting comfortable with the OneNote interface
- Creating your first notebook structure
- Taking and formatting basic notes
- Working with sections and pages effectively





#### *Essential Features for Productivity*

- Capturing content with screen clippings
- Inserting and managing file attachments
- Using quick notes and quick access features
- Tagging important information for follow-up

#### *Sharing and Accessibility*

- Accessing notebooks across devices
  - Basic notebook sharing
  - Printing and exporting notes
  - Finding your content with search
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## Microsoft 365

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### Microsoft 365 Overview

#### Delivery

3-hour session

Hands-on, instructor-led training

#### Overview

Gain a comprehensive understanding of Microsoft 365 applications and services to enhance productivity and collaboration in your organization.

#### Course Outline

##### *Microsoft 365 Fundamentals*

- Understanding the Microsoft 365 ecosystem
- Accessing applications via web, desktop, and mobile
- Navigating the Microsoft 365 portal
- Managing Microsoft 365 account settings

##### *Core Applications Overview*

- Working with Word, Excel, PowerPoint, and Outlook
- Understanding the modern interface across applications
- Accessing recent files and recommended content
- Saving and sharing from Office applications

##### *Communication and Collaboration*

- Using Microsoft Teams for chat and meetings
- Working with Outlook for email and calendar
- Leveraging OneDrive for file storage and sharing
- Understanding SharePoint team sites

##### *Mobile and Remote Work*

- Accessing Microsoft 365 on mobile devices
- Working offline and syncing content



- Managing notifications across platforms
- Using Microsoft 365 apps for remote productivity

#### *Best Practices and Resources*

- Setting up effective workflows across applications
- Understanding subscription features and limitations
- Finding help and learning resources
- Planning your Microsoft 365 adoption strategy

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## **Microsoft 365 Collaboration Tools**

### **Delivery**

3-hour session

Collaboration scenarios included

### **Overview**

Master the integrated collaboration features across Microsoft 365 applications to streamline teamwork and enhance productivity.

### **Course Outline**

#### *Collaboration Fundamentals*

- Understanding modern collaboration concepts
- Working with files vs. conversations
- Managing permissions and sharing
- Creating effective collaborative workspaces

#### *Real-Time Co-Authoring*

- Co-editing documents in Word, Excel, and PowerPoint
- Using comments and @mentions
- Managing notifications for document activity
- Working with version history

#### *Teams as a Collaboration Hub*

- Organizing teams and channels for effective collaboration



- Integrating files, conversations, and meetings
- Managing team membership and permissions
- Using Teams to streamline project communications

#### *SharePoint and OneDrive Integration*

- Understanding the relationship between Teams, SharePoint, and OneDrive
- Organizing files for optimal collaboration
- Managing document libraries and file permissions
- Creating effective team sites for projects

#### *Cross-Application Workflows*

- Moving content between Microsoft 365 applications
- Creating integrated processes across apps
- Tracking work across multiple platforms
- Using Microsoft 365 to streamline business processes

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## Microsoft 365 Productivity Features

### Delivery

3-hour session

Productivity scenarios included

### Overview

Discover the productivity-enhancing features across Microsoft 365 applications that can save time and streamline your daily work.

### Course Outline

#### *Modern Productivity Concepts*

- Understanding personal productivity in Microsoft 365
- Working with AI-powered suggestions and features
- Managing attention and focus with modern tools
- Creating custom productivity workflows



### *Content Creation Efficiency*

- Using templates across applications
- Implementing AutoSave and versioning
- Working with intelligent features (Designer, Ideas, Editor)
- Repurposing content across applications

### *Information Management*

- Organizing files for quick retrieval
- Using search effectively across Microsoft 365
- Managing email and information overload
- Creating knowledge management systems

### *Task and Time Management*

- Using Microsoft To Do for task management
- Working with Planner for team tasks
- Integrating tasks with Outlook and Teams
- Creating effective calendar management strategies

### *Automation Basics*

- Understanding automation concepts
  - Using Quick Steps in Outlook
  - Creating basic workflows with Power Automate
  - Implementing time-saving automations
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## Power Automate

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### Power Automate Fundamentals

#### Delivery

3-hour session  
Hands-on, instructor-led training

#### Overview

Learn to create automated workflows with Microsoft Power Automate to streamline repetitive tasks and build efficient business processes.

#### Course Outline

##### *Getting Started with Power Automate*

- Understanding the Power Automate interface
- Navigating the Flow portal and dashboard
- Working with templates vs. blank flows
- Setting up connections to services

##### *Building Your First Flows*

- Creating automated flows with triggers
- Working with common trigger types
- Adding actions to your flow
- Testing and troubleshooting flows

##### *Working with Microsoft 365 Connectors*

- Automating tasks in Outlook
- Creating flows for SharePoint
- Working with Teams integrations
- Connecting to OneDrive and other Microsoft services

##### *Condition-Based Workflows*

- Adding conditions to your flows
- Working with if/then branches



- Using switch statements for multiple paths
- Building complex conditional logic

#### *Flow Management and Monitoring*

- Turning flows on and off
- Viewing run history and analytics
- Troubleshooting failed flows
- Sharing and managing flows

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## **Power Automate Advanced Techniques**

### **Delivery**

3-hour session

Implementation examples included

### **Overview**

Master advanced Power Automate capabilities to create sophisticated automated workflows that solve complex business challenges.

### **Course Outline**

#### *Advanced Triggers and Actions*

- Working with manual and custom triggers
- Using schedule triggers effectively
- Implementing webhook triggers
- Chaining multiple actions for complex processes

#### *Data Manipulation Techniques*

- Working with variables and collections
- Using expressions for data manipulation
- Implementing parse JSON actions
- Creating and using arrays in flows

#### *Advanced Approval Workflows*

- Building multi-stage approval processes



- Creating parallel and sequential approvals
- Implementing custom approval interfaces
- Adding conditions to approval workflows

#### *Error Handling and Business Continuity*

- Implementing retry policies
- Adding scope and exception handling
- Creating error notification systems
- Building robust, fault-tolerant flows

#### *Integration with Other Power Platform Components*

- Connecting flows to Power Apps
- Working with Power BI alerts and actions
- Understanding the broader Power Platform ecosystem
- Building comprehensive business solutions

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## Project

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### Microsoft Project Essentials

#### Delivery

3-hour session

Hands-on, instructor-led training

#### Overview

Learn the fundamentals of Microsoft Project to plan, track, and manage projects effectively with industry-standard tools and techniques.

#### Course Outline

##### *Getting Started with Project*

- Navigating the Project interface
- Understanding views and ribbons
- Creating a new project file





- Setting basic project properties and calendars

#### *Defining Project Tasks*

- Creating and organizing project tasks
- Establishing work breakdown structures (WBS)
- Working with summary tasks and subtasks
- Adding milestones and deliverables

#### *Building the Project Timeline*

- Defining task durations
- Establishing task relationships and dependencies
- Understanding task constraints
- Creating a logical project schedule

#### *Working with Resources*

- Adding human and material resources
- Assigning resources to tasks
- Managing resource workloads
- Handling resource costs and budgeting

#### *Basic Project Tracking*

- Establishing a project baseline
- Updating task completion
- Tracking actual vs. planned progress
- Identifying schedule variances

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## **Microsoft Project Advanced Techniques**

### **Delivery**

3-hour session

Project scenarios included



## Overview

Master advanced Microsoft Project features to handle complex projects, optimize resources, and provide meaningful status reporting.

## Course Outline

### *Advanced Scheduling Techniques*

- Working with multiple task dependencies
- Using lag and lead time effectively
- Managing constraints and deadlines
- Creating custom calendars for resources and tasks

### *Resource Optimization*

- Identifying and resolving resource overallocations
- Leveling resources effectively
- Working with resource pools
- Managing resource availability and capacity

### *Project Monitoring and Control*

- Tracking costs and earned value
- Updating and rescheduling project tasks
- Working with project variances
- Managing project changes and impacts

### *Custom Project Views*

- Creating and modifying project views
- Working with tables and filters
- Using grouping and sorting effectively
- Building custom fields and formulas

### *Project Reporting*

- Creating visual reports and dashboards
- Working with built-in reports
- Customizing reports for stakeholders

- Exporting project data for analysis

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## Managing Multiple Projects

### Delivery

3-hour session

Multi-project examples provided

### Overview

Learn techniques for managing multiple interconnected projects, sharing resources across projects, and creating program-level views and reports.

### Course Outline

#### *Multi-Project Fundamentals*

- Understanding project interdependencies
- Creating master projects and subprojects
- Managing linked projects effectively
- Building a cohesive project portfolio

#### *Shared Resources Across Projects*

- Creating and using resource pools
- Managing resource allocation across projects
- Identifying and resolving cross-project conflicts
- Optimizing resource utilization portfolio-wide

#### *Cross-Project Dependencies*

- Creating links between projects
- Managing predecessor/successor relationships
- Understanding critical paths across projects
- Handling schedule changes and impacts

#### *Consolidated Reporting*

- Creating program-level views
- Building portfolio dashboards



- Reporting on resource utilization across projects
- Analyzing performance across multiple projects

#### *Program Management Techniques*

- Aligning projects with program objectives
- Standardizing project elements
- Creating consistent tracking methods
- Managing stakeholder communications

## Planner and To Do

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### Microsoft Planner and To Do

#### Delivery

3-hour session

Hands-on, instructor-led training

#### Overview

Master Microsoft Planner and To Do to manage team projects and personal tasks efficiently within the Microsoft 365 ecosystem.

#### Course Outline

##### *Getting Started with Planner*

- Navigating the Planner interface
- Understanding boards, buckets, and tasks
- Creating new plans for team projects
- Accessing Planner through Teams and the web

##### *Building Effective Project Boards*

- Creating and organizing tasks
- Using buckets for logical grouping
- Adding task details, checklists, and attachments
- Setting due dates and assignments

##### *Task Management in Planner*

- Assigning tasks to team members
- Using labels and priority flags
- Adding comments and attachments
- Tracking task progress and completion

##### *Planning Visualization and Reporting*

- Working with Charts view for progress tracking
- Using Schedule view for timeline management



- Filtering and sorting tasks effectively
- Exporting plan data for reporting

#### *To Do Fundamentals*

- Understanding the To Do interface
- Working with My Day planning
- Creating and managing personal task lists
- Using smart lists (Planned, Important, Assigned to me)

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## **Collaborative Task Management**

### **Delivery**

3-hour session

Team scenarios included

### **Overview**

Leverage Microsoft's task management tools to create effective team workflows, coordinate activities, and track progress across projects.

### **Course Outline**

#### *Team Collaboration in Planner*

- Creating collaborative plans
- Managing team member access and permissions
- Using comments and notifications effectively
- Implementing best practices for team task management

#### *Planner Integration with Teams*

- Adding Planner tabs to Teams channels
- Working with Planner in the Teams interface
- Using conversations and Planner together
- Creating channel-specific plans

#### *Shared Tasks and Responsibilities*

- Creating task templates for recurring projects



- Establishing responsibility matrices in Planner
- Managing hand-offs between team members
- Tracking team workloads and capacity

#### *Cross-Application Task Management*

- Understanding task management across Microsoft 365
- Working with Outlook tasks and To Do
- Managing flagged emails as tasks
- Creating integrated task management workflows

#### *Reporting and Analysis*

- Tracking team productivity
  - Creating status reports from Planner data
  - Analyzing task completion metrics
  - Building dashboards for project health
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## Forms

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### Microsoft Forms Essentials

#### Delivery

3-hour session

Hands-on, instructor-led training

#### Overview

Learn to create effective surveys, quizzes, and polls with Microsoft Forms to collect and analyze data easily within the Microsoft 365 ecosystem.

#### Course Outline

##### *Getting Started with Forms*

- Navigating the Forms interface
- Understanding different form types (forms vs. quizzes)
- Creating your first form
- Managing form settings and options

##### *Building Effective Questions*

- Working with different question types
- Creating multiple-choice questions
- Building rating and ranking questions
- Using text and number input fields

##### *Enhanced Form Features*

- Adding sections to organize longer forms
- Creating branching logic for dynamic forms
- Using images in questions and answers
- Setting up mathematical equations

##### *Form Distribution and Sharing*

- Generating and sharing form links
- Embedding forms in websites and Teams





- Managing permissions and access
- Creating QR codes for easy form access

#### *Analyzing Form Responses*

- Viewing and interpreting response data
- Working with the automatic analytics
- Exporting data to Excel for advanced analysis
- Creating response summaries for stakeholders

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## **Microsoft Forms Advanced Features**

### **Delivery**

3-hour session

Business application examples included

### **Overview**

Master advanced Microsoft Forms features for professional surveys, feedback collection, and business data gathering scenarios.

### **Course Outline**

#### *Advanced Question Design*

- Creating sophisticated question structures
- Using conditional and dynamic questions
- Implementing validation for responses
- Designing for higher response rates and completion

#### *Business Application Scenarios*

- Customer feedback and satisfaction surveys
- Event registration and management
- Employee pulse surveys and feedback
- Product and service evaluation forms

#### *Data Analysis Techniques*

- Advanced response analysis methods



- Creating dynamic Excel reports from Forms data
- Identifying trends and patterns in responses
- Building visualization dashboards for form results

#### *Forms Integration with Microsoft 365*

- Connecting Forms to Excel for automated data processing
- Using Forms with Power Automate for workflows
- Integrating Forms in Teams and SharePoint
- Creating collaborative data collection processes

#### *Forms Administration*

- Managing organizational forms
  - Implementing data retention policies
  - Handling sensitive information in forms
  - Creating form templates for consistent branding
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## Lists

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### Microsoft Lists Essentials

#### Delivery

3-hour session

Hands-on, instructor-led training

#### Overview

Learn to create, customize, and manage Microsoft Lists to track information and organize data for teams and projects within the Microsoft 365 ecosystem.

#### Course Outline

##### *Getting Started with Lists*

- Understanding Microsoft Lists vs. SharePoint lists
- Navigating the Lists interface
- Using built-in templates for common scenarios
- Creating your first list from scratch

##### *Building Effective Lists*

- Designing appropriate column types
- Working with text, number, and choice fields
- Creating date and people columns
- Adding calculated columns for automatic values

##### *List Organization and Views*

- Creating and customizing list views
- Sorting and filtering list data
- Working with group by and column formatting
- Building effective visualizations of list data

##### *Managing List Items*

- Adding, editing, and deleting list items
- Working with bulk operations



- Using quick edit for efficient data entry
- Managing versions and item history

#### *List Sharing and Collaboration*

- Sharing lists with colleagues
- Setting permissions and access levels
- Using comments and notifications
- Collaborating on list content effectively

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## **Microsoft Lists Advanced Features**

### **Delivery**

3-hour session

Real-world application examples

### **Overview**

Master advanced Microsoft Lists capabilities to create sophisticated tracking systems, custom views, and automated processes for business data management.

### **Course Outline**

#### *Advanced Column Configuration*

- Creating lookup columns for relationships
- Working with managed metadata
- Implementing column validation rules
- Building custom calculated columns with formulas

#### *Advanced Views and Formatting*

- Creating conditional views for different scenarios
- Implementing custom formatting with JSON
- Designing custom forms for data entry
- Building dashboard-style views with formatting

#### *Business Application Scenarios*

- Project and task tracking systems



- Inventory and asset management
- Employee onboarding and training tracking
- Event planning and management lists

#### *Automation with Lists*

- Setting up alerts and notifications
- Creating basic Power Automate flows from lists
- Implementing approval processes
- Automating repetitive list tasks

#### *Lists Integration with Microsoft 365*

- Using Lists in Teams as tabs
  - Working with Lists in SharePoint sites
  - Connecting Lists with Power Apps
  - Exporting list data to Excel for analysis
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## Windows 11

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### Windows 11 Essentials

#### Delivery

3-hour session  
Hands-on, instructor-led training

#### Overview

Learn the essential features and productivity enhancements in Windows 11 to improve your workflow and make the most of your operating system.

#### Course Outline

##### *Getting Started with Windows 11*

- Understanding the new Windows 11 interface
- Navigating the redesigned Start menu
- Working with the taskbar and notification center
- Customizing your desktop environment

##### *Productivity Enhancements*

- Using Snap Layouts for window management
- Working with virtual desktops effectively
- Managing notifications and focus settings
- Utilizing keyboard shortcuts for efficiency

##### *File Management Improvements*

- Navigating the updated File Explorer
- Working with tabs in File Explorer
- Managing OneDrive integration
- Organizing files and folders effectively

##### *Windows 11 Apps and Features*

- Working with built-in applications
- Using the Microsoft Store



- Managing widgets and personalization
- Understanding system tools and utilities

#### *Settings and Customization*

- Navigating the Settings app
- Personalizing your Windows experience
- Managing user accounts and profiles
- Configuring system preferences

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## **Windows 11 Quick Start (90-Minute Session)**

### **Delivery**

90-minute focused session  
Quick reference guide included

### **Overview**

A concentrated introduction to the most important new features and changes in Windows 11 for busy professionals who need to transition quickly.

### **Course Outline**

#### *Windows 11 Navigation Essentials*

- Understanding the redesigned interface
- Working with the centered Start menu and taskbar
- Managing notifications and quick settings
- Essential keyboard shortcuts for efficiency

#### *Key Productivity Features*

- Using Snap Layouts for window organization
- Working with multiple desktops
- Managing widgets for information at a glance
- Customizing your workspace for efficiency

#### *Important Settings and File Management*

- Finding what you need in the updated Settings app



- Navigating File Explorer changes
- Managing OneDrive integration

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