Microsoft Education Services

Course Catalogue April 2023

Welcome

Over the past few years huge advances have been made in communication technology within the workplace. The ability of employees to connect collaboratively and work within a network with global real time communication has vastly improved the efficiency and productivity of organisations.

The downside to this accelerated advance in technology is many organisations and employees are struggling to keep up with the adoption of the technology and it can be met with resistance from the staff it is designed to help.

To drive successful technology adoption, it is important to understand not just the business needs but also the needs of all stakeholders to ensure they understand the benefits and embrace the new technology. At Fast Lane we understand that identification of key stakeholders, their roles within an organisation and their responsibilities in terms of enabling a successful roll out is essential to creating clear, structured and managed training sessions that focus on the areas each stakeholder needs to fulfil their responsibilities with the organisation.

With this in mind Fast Lane has developed a range of training courses available to all those involved in any upgrade around Microsoft and Microsoft 365.

Education Methodology

Fast Lane regards itself as a complete service provider and as a result has developed a best practice methodology:

Bid Support (Free of charge)	» Bid support services - Assist sales teams, ensure correct amount and type of training has been sold » White labelling - seamless face to the customer and representation as the 'Training Manager' and/or 'Training Team

Consultancy	» End user consultants to assist with any demonstrations required. » Availability can be scaled up during busy periods to meet demand by utilising our established network of trainers. » End user data gathering consultants, working with supervisors & » Administrators to explain the new technology that has been sold within the solution to help them understand how the new system will work/operate.

Training Analysis	» The Training Format – Pre-training, train the trainer, system administration, go-live support » Profile of trainees – New user, basic, intermediate, advanced

Education Plan	» Collated data from the previous phase is used to design a training solution » Development of bespoke training documents » Date and training schedules are discussed and agreed » Training Tools – User guides, projectors, flip charts, reference manuals, computers, and handsets » Appropriate training environment scheduled and prepared

Online Video	» Bespoke videos - ongoing connection and support between you and the end client long after installation is complete. » Meets the needs and requirements of each client by leveraging the trainer's expertise and knowledge around the solution and the specific end client's requirements. » MP4 videos - cost-effective solution as the client doesn't need to pay an ongoing licence fee for access.

Training Delivery	» The courses are delivered in accordance with the format agreed in the previous phase » Any related documentation is distributed to the delegates

Go Live Support	» With an established network of trainers, Fast Lane can quickly and easily adapt to different sized rollouts. From one to one white glove service to large on-site floor walking support, we can accommodate multiple project rollouts simultaneously.

Review	» Training assessment forms are completed after every training course delivered by a Fast Lane trainer. This is sent back to the project manager for further review and assessment.

Microsoft 365 Teams – Collaborating in Teams

Duration	90 minutes		
Group Size	Up to 25 people maximum		
Prerequisite	No Prerequisite		
Course Type	Microsoft 365	**Course code**	O365:TECO:COLT
Training Room Requirements	» Meeting Room » TV/Projector » PC/Laptop with Teams per user		
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams		
Note	This course should take place before a cutover		

COURSE DESCRIPTION

Microsoft Teams is a combination of multiple different software programs. This course will demonstrate how to use the basic features of teams, creating and managing a team.

COURSE CONTENT

Upon successful completion, delegates will be able to:

Microsoft 365 Teams Overview:

✓ Introducing the concept of Teams Collaboration

✓ Teams vs SharePoint vs OneDrive

Team Overview

✓ Understand the general channel

✓ Understand the Files tab

✓ Understand additional tabs

✓ Inviting people to a Team

Understanding Channels

- ✓ Searching for Channels
- ✓ Following Channels
- ✓ Managing Channel notifications
- ✓ Channel email address
- ✓ Pin/Unpin Channels
- ✓ Moving order of Team sites
- ✓ Connectors

File Collaboration

- ✓ Upload and share files (documents)
- ✓ Create new files within a team
- ✓ 3 ways to open/edit a file:
- ✓ Changing default way to open a file
- ✓ Real-time collaboration
- ✓ Version History
- ✓ SharePoint integration
- ✓ Access to your personal OneDrive
- ✓ Access laptop downloads
- ✓ Checkout documents

Missed activity

- ✓ Managing Teams notifications
- ✓ Managing Email notifications

Microsoft 365 Teams – Communicating in Teams

Duration	90 minutes
Group Size	Up to 25 people maximum
Prerequisite	No Prerequisite
Course Type	Microsoft 365 **Course code** O365:TECO:COMT
Training Room Requirements	» Meeting Room » TV/Projector » PC/Laptop with Teams per user
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams
Note	This course should take place before a cutover

COURSE DESCRIPTION

Microsoft Teams is a combination of multiple different software programs. This course will demonstrate how to use the basic features of teams meetings and demonstrate how to use the basic features of teams chats.

COURSE CONTENT

Upon successful completion, delegates will be able to:

121 Chats:

- ✓ How to search for a contact and start a new chat
- ✓ Active directory
- ✓ Presence indicator
- ✓ Escalating a call from a chat to an audio or video call
- ✓ Screenshare within a chat

Group Chats:

- ✓ Adding participants to a chat (group chat)
- ✓ Renaming a group chat
- ✓ Allowing added participants to view previous chat history
- ✓ Understand chat conversation toolbar
- ✓ Screenshare within a group chat
- ✓ @mentions within a chat
- ✓ Where are the files stored? (OneDrive integration)
- ✓ Collaborate on attached files
- ✓ Pin/Unpin chats
- ✓ Muting/Leaving a chat

Channel Conversations:

- ✓ Conversations (Persistent)
- ✓ Conversation toolbar
- ✓ Replying and interacting with conversations
- ✓ Managing Notifications for Channels
- ✓ @mentions
- ✓ Understand differences between Channel Conversation and 121 chat conversation
- ✓ Moving from Emails to Teams Conversations

Microsoft 365 Teams – Teams meetings

Duration	90 minutes		
Group Size	Up to 25 people maximum		
Prerequisite	No Prerequisite		
Course Type	Microsoft 365	Course code	0365:TECO:TM
Training Room Requirements	» Meeting Room » TV/Projector » PC/Laptop with Teams per user		
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams		
Note	This course should take place before a cutover		

COURSE DESCRIPTION

This course will demonstrate how to use the basic features of Teams meetings and scheduling.

COURSE CONTENT

Meeting scheduling

- ✓ Schedule a meeting from Teams Calendar
- ✓ Select a channel to meet in
- ✓ Invite people
- ✓ Schedule a meeting from Outlook Calendar
- ✓ Add buffer time to meetings
- ✓ Find Time

Meeting Preparation

- ✓ Edit and update invites
- ✓ Meeting options
- ✓ Understand meeting roles and permissions
- ✓ Q&A setup
- ✓ Adding files
- ✓ Polls & Forms
- ✓ Whiteboard

Joining meetings

- ✓ Joining online vs in app
- ✓ Managing lobbies and attendees
- ✓ Mute all
- ✓ Pulling people into meetings
- ✓ Device & camera options/layouts

Interacting in meetings

- ✓ Screen share options
- ✓ PowerPoint Live
- ✓ Interacting with attendees
- ✓ Q&A in meetings
- ✓ Polls & Forms
- ✓ Whiteboard

Meeting follow up

- ✓ Meeting notes
- ✓ Recording & Transcriptions
- ✓ Attendance Report
- ✓ Locating files shared

Microsoft 365 Teams – Teams Owners (Managing a Microsoft Team)

Duration	90 minutes		
Group Size	Up to 25 people maximum		
Prerequisite	No Prerequisite		
Course Type	Microsoft 365	Course code	O365:TAOW
Training Room Requirements	» Meeting Room » TV/Projector » PC/Laptop with Windows 10		
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams		
Note	This course should take place before a cutover		

COURSE DESCRIPTION

This course is aimed at Teams content authors/ site owners and focuses creating and managing Teams. This course is for users who need to manage Teams.

COURSE CONTENT

Creating Teams and Adding Members:

- ✓ Creating Teams
- ✓ Roles and Permissions
- ✓ Guest Access and Best Practice
- ✓ Adding and removing members
- ✓ Editing Team names
- ✓ Hide/Show teams
- ✓ Deleting Teams

Managing members

- ✓ Controlling guest and member permissions
- ✓ Creating notifications for file changes
- ✓ Creating colleague activity notifications
- ✓ Planner

Managing Teams & Channels

- ✓ Team settings
- ✓ Planning your Team structure
- ✓ Creating a Channel
- ✓ Editing Channel names
- ✓ Channel email address
- ✓ Get the link address to the channel
- ✓ Connectors
- ✓ Adding documents as a tab
- ✓ Adding other tabs

Data

- ✓ Sharing files outside a Team
- ✓ Changing permissions for documents
- ✓ Checking access and links

Microsoft 365 Teams- Super User

Duration	½ day
Group Size	Up to 10 people maximum
Prerequisite	No Prerequisite
Course Type	Microsoft 365 **Course code** O365:TECO:S
Training Room Requirements	» PC/Laptop with Teams per user
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams
Note	This course should take place before a cutover

COURSE DESCRIPTION

The Microsoft 365 is a combination of multiple different software programs. This course will demonstrate how to use the basic and advanced features of Teams

COURSE CONTENT

Upon successful completion, delegates will be able to:

Microsoft 365 Teams Overview:

- ✓ Introducing the concept of Teams
- ✓ Integrated solution
- ✓ Helps your team staying organised
- ✓ Have conversations in the same place
- ✓ Accessing the Teams App
- ✓ Navigating in the Teams App
- ✓ Understand Teams Menu

121 Chats:

- ✓ How to search for a contact and start a new chat
- ✓ Active directory
- ✓ Presence indicator
- ✓ Escalating a call from a chat to an audio or video call
- ✓ Screenshare within a chat

Group Chats:

- ✓ Adding participants to a chat (group chat)
- ✓ Renaming a group chat
- ✓ Allowing added participants to view previous chat history
- ✓ Understand chat conversation toolbar
- ✓ Screenshare within a group chat
- ✓ @mentions within a chat
- ✓ Where are the files stored? (OneDrive integration)
- ✓ Collaborate on attached files
- ✓ Pin/Unpin chats
- ✓ Muting/Leaving a chat

Creating Teams/Channels and Adding Members:

- ✓ Creating Teams public and private
- ✓ Adding and removing members
- ✓ Editing Team names
- ✓ Searching for Teams and becoming a member
- ✓ Hide/Show teams
- ✓ Adding Channels public and private
- ✓ Letting people know the link to join a public team that has been created or generate team code
- ✓ Privacy options
- ✓ Deleting Teams and channels
- ✓ Adding tabs to a channel
- ✓ Wiki tab

Managing Teams & Channels:

- ✓ Creating a Channel – Standard and Private
- ✓ Searching for Channels
- ✓ Following Channels
- ✓ Editing Channel names
- ✓ Channel email address
- ✓ Get the link address to the channel
- ✓ Pin/Unpin Channels
- ✓ Moving order of Team sites
- ✓ Starting conversations in a channel
- ✓ @mentions – Channels and teams
- ✓ Connectors
- ✓ Adding documents as a tab
- ✓ Adding further Wiki tabs
- ✓ Adding other Microsoft tabs

Teams Tabs

- ✓ Understand the general channel
- ✓ Understand the Files tab
- ✓ Understand the Wiki tab

Team Conversations & Files:

- ✓ Conversations (Persistent)
- ✓ @mentions
- ✓ Conversation toolbar
- ✓ Upload and share files (documents)
- ✓ Create new files within a team
- ✓ 121 Chats
- ✓ Screen sharing

File Collaboration

- ✓ Upload and share files (documents)
- ✓ Create new files within a team

- ✓ 3 ways to open/edit a file: What to use when?
- ✓ Real-time collaboration
- ✓ SharePoint integration
- ✓ Access to your personal OneDrive
- ✓ Access laptop downloads

Managing Files:

- ✓ Copying and Moving Files
- ✓ Linking files to a conversation
- ✓ Recycle Bin
- ✓ Version History
- ✓ Online Word
- ✓ Co Authoring
- ✓ Check out/Check in a file

Internal Calls:

- ✓ Calling someone internally
- ✓ Create contact group
- ✓ Call controls during a call

Meetings:

- ✓ Schedule a meeting Teams vs. Outlook
- ✓ Select a channel to meet in
- ✓ Invite people
- ✓ Join though teams and online
- ✓ Connecting and checking devices
- ✓ Meeting Options
- ✓ Chat with participants
- ✓ Participant preferences
- ✓ Edit and updating meetings
- ✓ Live meeting functionality: Join Information / Change Background / Share video / content
- ✓ Cancel meetings

Microsoft 365 Teams Voice

Duration	90 minutes
Group Size	Up to 50 people maximum
Prerequisite	No Prerequisite
Course Type	Microsoft 365 **Course code** O365:TEVO
Training Room Requirements	» Meeting Room » TV/Projector » PC/ Laptop with Teams installed per user » 3 client test accounts must be provided
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams » 3 client test accounts must be provided
Note	This course should take place before a cutover

COURSE DESCRIPTION

This course will provide users with an overview and introduction of the calling and telephony features within Teams.

This course can be completely customised for each client as appropriate.

COURSE CONTENT

Upon successful completion, delegates will be able to:

Microsoft Teams Telephony Overview

- ✓ What is a softphone?
- ✓ Integrated with Teams
- ✓ Access from any device
- ✓ Desktop Application
- ✓ Mobile Application

Making a call

- ✓ Making internal & external phone calls – Desktop & Mobile
- ✓ Start an internal call or call to a guest from a chat in Teams - Desktop
- ✓ Start an internal call or call to a guest from a chat in Teams – Mobile
- ✓ Start an external call from Teams phone app – Desktop
- ✓ Start an external call from Teams phone app – Mobile
- ✓ Speed dials
- ✓ Speed dial groups
- ✓ View/add contacts
- ✓ Start a call from Contacts
- ✓ Start a call from History
- ✓ Start a call from Outlook

Answering a call

- ✓ Answering a call – Desktop
- ✓ Answering a call – Mobile

Understanding the Call Window & Call Controls

- ✓ Place callers on hold – Desktop & Mobile
- ✓ Place callers on mute – Desktop & Mobile
- ✓ Using dialpad during a call

Transfer & Conference

- ✓ Unsupervised Transfer calls
- ✓ Supervised Transfer
- ✓ Cancelling a transfer
- ✓ Adding someone to a call

Call Forwarding

- ✓ Activate Call Forwarding
- ✓ Understand Call Forward options
- ✓ Forward calls to a call group
- ✓ Setting up a pickup group – Simultaneous Ring

Call Delegation and Shared Lines

- ✓ Understand delegate permissions and features
- ✓ Add a delegate
- ✓ Make and receive calls as a delegate
- ✓ Put calls on hold as a delegate
- ✓ Change your boss's call and delegate settings

Other Settings

- ✓ Call Blocking
- ✓ Understand DND and setting up Priority Access
- ✓ Setting up Distinctive Ringtones
- ✓ Manage Audio & Video settings
- ✓ Tagging for status change alerts

Voicemail

- ✓ Using Voicemail
- ✓ Setup Your Voicemail greeting
- ✓ Generic vs. out of office
- ✓ Check your voicemail

Microsoft 365 Teams Voice- Mobile

Duration	90 minutes		
Group Size	Up to 10 people maximum		
Prerequisite	No Prerequisite		
Course Type	Microsoft 365	Course code	O365:TEVO:M
Training Room Requirements	» Meeting Room » TV/Projector » PC/ Laptop with Teams installed per user » 3 client test accounts must be provided		
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams » 3 client test accounts must be provided		
Note	This course should take place before a cutover		

COURSE DESCRIPTION

This course will provide users with an overview and introduction of the calling and telephony features within Teams Mobile.

This course can be completely customised for each client as appropriate.

COURSE CONTENT

Upon successful completion, delegates will be able to:

Microsoft Teams Telephony Overview

- ✓ What is a softphone?
- ✓ Integrated with Teams
- ✓ Access from any device
- ✓ Desktop Application
- ✓ Mobile Application

Making a call

- ✓ Making internal & external calls
- ✓ Start an internal call or call to a guest from a chat in Teams
- ✓ Add external contacts
- ✓ Start a call from History

Answering a call

- ✓ Answering a call

Understanding the Call Window & Call Controls

- ✓ Place callers on hold
- ✓ Place callers on mute
- ✓ Using dialpad during a call

Transfer & Conference

- ✓ Unsupervised Transfer calls
- ✓ Supervised Transfer
- ✓ Cancelling a transfer
- ✓ Adding someone to a call

Meetings:

- ✓ Schedule a meeting
- ✓ Select a channel to meet in
- ✓ Invite people
- ✓ Join though teams and Outlook
- ✓ Connecting and checking devices
- ✓ Meeting Options
- ✓ Chat with participants
- ✓ Participant preferences
- ✓ Edit and updating meetings
- ✓ Cancel meetings

Call Forwarding

- ✓ Activate Call Forwarding
- ✓ Understand Call Forward options

Voicemail

- ✓ Using Voicemail
- ✓ Setup Your Voicemail greeting
- ✓ Check your voicemail

Microsoft Teams Voice Administration

Duration	½ Day		
Group Size	Up to 5 people per session		
Prerequisite	Basic experience with Microsoft 365 Admin Centre		
Course Type	Administration	Course code	O365:TEVO:A
Training Room Requirements	» Meeting Room » Access to the in-house Microsoft Administration Centre		
Remote Training Requirements	» Access to the in-house Microsoft Administration Centre		
Note			

COURSE DESCRIPTION

This course aims to provide delegates with an introduction to administering Microsoft Teams voice. It will cover the essentials for getting delegate upskilled in the Teams voice administration, to be able to make adlibs and changes to their telephony system in the future.

COURSE CONTENT

Upon successful completion, delegates will be able to:

Microsoft Teams Overview

- ✓ Overview of Microsoft Teams Voice and Super User Training
- ✓ Overview of Teams Admin Portal
- ✓ Customising the view of the portal

Manage communication in Microsoft Teams

- ✓ Manage Live event and meetings experiences
- ✓ Manage phone numbers

Managing users

- ✓ Creating a new user
- ✓ Licensing a user
- ✓ Assigning a user a phone/number

Manage Call flows and devices

- ✓ Resource accounts
- ✓ Call Queues
- ✓ Auto Attendant / IVR
- ✓ Holidays
- ✓ Devices

Basic IT troubleshooting

- ✓ Where to access help and information
- ✓ Locating call data

Teams Voice Change Management & Training Lite Package

Course Type	Microsoft 365	Course code	O365:TEVO:CMT:L
Training Room Requirements	» Meeting Room » TV/Projector » PC/ Laptop with Teams installed per user » 3 client test accounts must be provided		
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams » 3 client test accounts must be provided		
Note	This course should take place before a cutover		

COURSE DESCRIPTION

This package consists of-

- ✓ Teams Voice Training & Communications Workshop (details below)
- ✓ Quick reference guide (QRG)
- ✓ In Depth Guide
- ✓ 2x Teams Voice Train the trainer session (up to 2 hours)

COURSE CONTENT

The Communications and Training Workshop provides an in-depth look at designing and improving an organization's communications campaign and training program. Participants will learn best practices on how to develop a coherent and compelling message to target audiences/stakeholders specifically for Teams Voice deployments.

The Training section will look at the logistics of training and the requirement of specific stakeholders and help come up with an appropriate training/onboarding plan.

Communications Workshop

- ✓ Understand the best communications approach
- ✓ Understand branding approval guidelines required and timescales
- ✓ Agree communication channels
- ✓ Identify key target audience/stakeholders
- ✓ Define tailored messaging
- ✓ Understand key dates
- ✓ Understand importance of an appropriate communications plan (Local or global)
- ✓ Input into OCM recommendation and Risk log

Training workshop

- ✓ Review training history
- ✓ Identify current process and resource for training & coordination & approval
- ✓ Requirements for specific stakeholders
- ✓ Discuss training logistics
- ✓ 'Train the trainer' or 'End User' training requirements
- ✓ Develop Training/onboarding plan

Further information on the QRG and Guide can be found by clicking here

Further information on the Teams Voice Train the trainer session can be found by clicking here

Teams Meeting Rooms

Duration	90 minutes
Group Size	Up to 10 people maximum
Prerequisite	No Prerequisite
Course Type	Microsoft 365 **Course code** O365:TEMR
Training Room Requirements	» Access to Teams Meeting Room Equipment » Client Laptop with Teams installed
Remote Training Requirements	» This course should take place after equipment is installed and tested. » Training can only be delivered onsite.

COURSE DESCRIPTION

This course will show key users how to use Teams Meeting rooms. Various scenarios will be covered and explained.

Key users that need training normally work within one of the following areas:

a. Secretaries/PA's/EA's

b. Front of house / Receptionists

c. Team Co-ordinators

d. Champions

This course can be completely customised for each client as appropriate.

COURSE CONTENT

Upon successful completion, delegates will be able to:

Host a teams meeting

✓ Book a meeting

✓ Create a meeting in Outlook

✓ Reserve a Room

- ✓ Attending the meeting
- ✓ Hosting an Ad-hoc meeting

Joining a meeting

- ✓ Joining a meeting as a host
- ✓ Joining a meeting as an internal colleague
- ✓ Joining a meeting as an external guest
- ✓ Starting an unscheduled meeting

Hosting a non-teams meeting

- ✓ Connecting a personal device

In Meeting Functions

- ✓ In call touchscreen controls
- ✓ Share camera
- ✓ Sharing Desktop
- ✓ Managing participants

Teams Meeting Rooms Training Package

Course Type	Microsoft 365	Course code	O365:TEMR:P
Training Room Requirements	» Access to Teams Meeting Room Equipment » Client Laptop with Teams installed		
Remote Training Requirements	» This course should take place after equipment is installed and tested. » The training element can only be delivered onsite.		

COURSE DESCRIPTION

This package consists of-

- ✓ Communications and training Strategy Development and Workshops (2 Days- remote)

- ✓ Teams Meeting Rooms Train the trainer (1 Day- 4 x 90 minute sessions)

- ✓ Videos- option for Generic or Bespoke

COURSE CONTENT

Upon successful completion, delegates will be able to:

Communications Workshop

- ✓ Understand the best communications approach

- ✓ Understand branding approval guidelines required and timescales

- ✓ Agree communication channels

- ✓ Identify key target audience/stakeholders

- ✓ Define tailored messaging

- ✓ Understand key dates

- ✓ Understand importance of an appropriate communications plan (Local or global)

- ✓ Input into OCM recommendation and Risk log

Training workshop

- ✓ Review training history
- ✓ Identify current process and resource for training & coordination & approval
- ✓ Requirements for specific stakeholders
- ✓ Discuss training logistics
- ✓ 'Train the trainer' or 'End User' training requirements
- ✓ Develop Training/onboarding plan

Teams Meeting Rooms Train the Trainer

Hosting a teams meeting

- ✓ Booking the meeting
- ✓ Creating a meeting in Outlook
- ✓ Reserve a Room
- ✓ Attending the meeting
- ✓ Hosting an Ad-hoc meeting

Joining a meeting

- ✓ Joining a meeting as a host
- ✓ Joining a meeting as an internal colleague
- ✓ Joining a meeting as an external guest
- ✓ Starting an unscheduled meeting

Hosting a non-teams meeting

- ✓ Connecting a personal device

In Meeting Functions

- ✓ In call touchscreen controls
- ✓ Share camera
- ✓ Sharing Desktop
- ✓ Managing participants

Microsoft – Introduction to OneDrive & SharePoint

Duration	90 minutes		
Group Size	Up to 25 people maximum		
Prerequisite	No Prerequisite		
Course Type	Microsoft 365	**Course code**	O365:IODS
Training Room Requirements	» Meeting Room » TV/Projector » PC/Laptop with Drive per user		
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams		
Note	This course should take place before a cutover		

COURSE DESCRIPTION

This course will show users how OneDrive & SharePoint can be used as a simple store for documents, by mobile workers as a way to access files from any location on any device, or as a collaboration tool to share and jointly work on documents.

COURSE CONTENT

Upon successful completion, delegates will be able to understand:

- ✓ About OneDrive
- ✓ What is OneDrive
- ✓ Understand differences between SharePoint, OneDrive and Teams
- ✓ Which file storage to use and when
- ✓ Best Practice
- ✓ Ways to access OneDrive
- ✓ OneDrive Application
- ✓ Icon Status
- ✓ Signing into OneDrive online

- ✓ Create, Upload, Documents
- ✓ Sync OneDrive Files to your Computer
- ✓ Preview OneDrive files on your computer
- ✓ Working with offline files
- ✓ Clearing space
- ✓ Storage sense
- ✓ Working with OneDrive files
- ✓ Opening and editing a Document using Desktop App vs Online
- ✓ View options
- ✓ Recycle Bin
- ✓ Sharing OneDrive Files and folders
- ✓ Sharing a Document
- ✓ Sharing permissions
- ✓ Quickly check what has been shared with you and what you have shared with others
- ✓ Collaborating on OneDrive Files
- ✓ Co-Authoring
- ✓ Restoring previous versions
- ✓ Manage Access and permissions

SharePoint Documents

- ✓ Logging into SharePoint Online
- ✓ The SharePoint interface
- ✓ Navigating sites
- ✓ Following sites
- ✓ Working with documents
- ✓ The site recycle bin
- ✓ Version History – Overview

Manage Content:

- ✓ Document Collaboration and co-authoring
- ✓ Check out / check in a document
- ✓ Using Alerts
- ✓ Syncing SharePoint online to local file storage

Microsoft 365 SharePoint Basic Introduction End User

Duration	90 mins		
Group Size	Up to 25 people maximum		
Prerequisite	No Prerequisite		
Course Type	Microsoft 365	Course code	O365:SHPO:I
Training Room Requirements	» Meeting Room » TV/Projector » PC/Laptop with Windows 10		
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams		
Note	This course should take place before a cutover		

COURSE DESCRIPTION

This course will give users an introduction to SharePoint and how it can help them in a collaborative working environment. They will be able to work with SharePoint apps / add-ins such as lists and libraries. Users will learn how to customise apps to meet personal needs with metadata and create views to arrange items of information. they will learn how to connect certain lists and libraries to Microsoft Outlook and know when to Check in / Check out, or use Live Co-authoring.

COURSE CONTENT

Module 1 - Understand SharePoint:

✓ Introducing Microsoft 365 and SharePoint Online.

✓ Understand differences between SharePoint, OneDrive and Teams

✓ Logging into SharePoint Online

Module 2 - SharePoint Document Library Apps:

- ✓ Working with SharePoint library apps
- ✓ The SharePoint interface
- ✓ Working with documents
- ✓ Document item menu
- ✓ The site recycle bin
- ✓ Version History – Overview

Module 3 - SharePoint Apps:

- ✓ Creating a list

Module 4 - Manage Items:

- ✓ Metadata & Columns
- ✓ Working with views
- ✓ Creating new views
- ✓ Managing and editing views
- ✓ Sorting
- ✓ Using Filters

Module 5 - Manage Content:

- ✓ Document Collaboration and co-authoring
- ✓ Check out / check in a document
- ✓ Version History – Restore and View
- ✓ Using Alerts
- ✓ Syncing SharePoint online to local file storage

Microsoft 365 SharePoint End User

Duration	½ day with no hands on, 1 day hands on (on site only)		
Group Size	Up to 10 people maximum		
Prerequisite	A basic understanding of Windows 7 or higher. Experience using Internet Explorer 11 or equivalent browser. Fundamental experience with Microsoft 365 is essential, including Log in and navigation around the service. A basic knowledge of Office applications (Word, Excel, Outlook).		
Course Type	Microsoft 365	Course code	O365:SHPO
Training Room Requirements	» Meeting Room » TV/Projector » PC/Laptop with Windows 10		
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams		
Note	This course should take place before a cutover		

COURSE DESCRIPTION

This course will familiarise users with SharePoint and how it can help them in a collaborative working environment. They will be able to work with SharePoint apps / add-ins such as lists and libraries. Users will learn how to customise apps to meet personal needs with metadata and create views to arrange items of information. they will learn how to connect certain lists and libraries to Microsoft Outlook and know when to Check in / Check out, or use Live Co-authoring

COURSE CONTENT

Module 1 - Understand SharePoint:

✓ Introducing Microsoft 365 and SharePoint Online.

✓ Understand differences between SharePoint, OneDrive and Teams

✓ Logging into SharePoint Online

✓ SharePoint information structure and The SharePoint environment

- ✓ SharePoint Settings
- ✓ Visit personal site – One Drive and personal profile

Module 2 - SharePoint Document Library Apps:

- ✓ Working with SharePoint library apps
- ✓ The library app interface
- ✓ Working with documents
- ✓ Document item menu
- ✓ The site recycle bin
- ✓ Version History – Overview

Module 3 - SharePoint Apps:

- ✓ What is a SharePoint app?
- ✓ Add SharePoint apps
- ✓ The List App interface
- ✓ SharePoint list apps
- ✓ Introducing list items
- ✓ Use the quick edit function

Module 4 - Manage Items:

- ✓ Metadata & Columns
- ✓ Working with views
- ✓ Creating new views
- ✓ Managing and editing views
- ✓ Grouping
- ✓ Sorting
- ✓ Using Filters

Module 5 - Manage Content:

- ✓ Document Collaboration and co-authoring
- ✓ Check out / check in a document
- ✓ Version History – Restore and View
- ✓ Using Alerts

✓ Connect information to Outlook – Contacts, Calendars, Tasks (Classic View)

✓ Sync Contacts from Outlook back to SharePoint

✓ Sync a SharePoint library to your local PC (via OneDrive)

Module 6 - Discover Information:

✓ Search

✓ Delve

✓ Update your personal site – One Drive, personal profile, newsfeed & alerts

Microsoft 365 SharePoint Site owner

Duration	2 Days
Group Size	Up to 10 people maximum
Prerequisite	A basic understanding of Windows 7 or higher. Experience using Internet Explorer 11 or equivalent browser. Fundamental experience with Microsoft 365 is essential, including Log in and navigation around the service. A basic knowledge of Office applications (Word, Excel, Outlook).
Course Type	Microsoft 365 **Course code** O365:SPSO
Training Room Requirements	» Meeting Room » TV/Projector » PC/Laptop with Windows 10
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams
Note	This course should take place before a cutover

COURSE DESCRIPTION

This course is aimed at SharePoint content authors/ site owners and focuses creating and managing sites with SharePoint Online. This course is for users who need to manage SharePoint sites.

COURSE CONTENT

Module 1 - Understand Microsoft 365:

- ✓ Introducing Microsoft 365 and SharePoint Online.
- ✓ Introducing Microsoft 365 and SharePoint Online
- ✓ Connect and log on to Microsoft 365 in the browser
- ✓ The Microsoft 365 environment
- ✓ Navigating the Microsoft 365 Apps
- ✓ OneDrive, Outlook, Teams and SharePoint

- ✓ Settings, Notifications, and Profile

Module 2- Introduction to SharePoint

- ✓ Reasons for using SharePoint
- ✓ Roles: End User, Content Manager/Creator and Site Owner Overview
- ✓ Introducing a SharePoint Site
- ✓ Create a SharePoint Team Site and investigate the content
- ✓ Site owners and Site members
- ✓ Brief introduction to working with documents and pages in SharePoint
- ✓ Exercise:
  - o Create or Upload a document
  - o Create a News Page for your site
  - o Edit the home page
- ✓ Libraries, versions and the recycle bin
- ✓ Restoring documents from the recycle bin

Module 3- SharePoint Lists & Libraries

- ✓ Intro: Creating a SharePoint Team Site and Configure Lists and Libraries
- ✓ What are Libraries vs what is a List?
- ✓ Types of Library and Types of List
- ✓ Exercise:
  - o Create a new Document Library – Policies
  - o Create and Image Library
  - o Create an Issues List
- ✓ Working with Documents
  - o Create new document
  - o Uploading document
  - o Edit Library Documents,
- ✓ Document menu and Document Info panel
- ✓ Sort/Filter and use Views
- ✓ Library Settings

Module 4- Create and Manage Pages and Content

- ✓ Document and Pages libraries
- ✓ Home Page vs News Pages
- ✓ Simple Edit process for Home page
- ✓ Pages library and types of pages
- ✓ Page Creation process
    - o Draft, Saved, Publish
- ✓ Adding Web Parts
    - o Common Web Parts
- ✓ Sections
    - o Create a new section
    - o Change the section layout
- ✓ Exercise:
    - o Create a 2 column News page
    - o Add Image and Text
    - o Add a News Post Link
- ✓ Adding Pages to your SharePoint Site, Adding and Modifying Web Parts
- ✓ Other types of page:
- ✓ Create Wiki Pages and Building a Knowledge-Base style Wiki site or area

Module 5- SharePoint Site Customization

- ✓ Site Information and Site Settings
- ✓ Change Site Title, Description, and Icon
- ✓ Modifying Navigation
- ✓ Change the Themes/ Custom Look
- ✓ Team vs Comms sites and Layout choices
- ✓ Other types of site: Publishing Sites, Document Centre, Records Centre, Project site
- ✓ SharePoint Site Hierarchy and Sub sites
- ✓ Modern Hub sites and navigation

Module 6- SharePoint Security and Site Users / Groups Management

- ✓ Security Overview
- ✓ Manage User Access to SharePoint Site, Manage Microsoft 365 Groups and Users

- ✓ Permissions Inheritance Hierarchy

- ✓ SharePoint Security Best Practices

- ✓ Share document / email a link

Module 7- Search / Discover Information

- ✓ Search

- ✓ People Search

- ✓ Your Profile, Delve and Security

Module 8- Optional / If time Browser vs Desktop versions of Word / Excel

- ✓ Working with documents in the Browser

- ✓ Co-Authoring

- ✓ Open in Desktop Word or Excel

- ✓ Check-out and check in

- ✓ Document item menu

- ✓ Viewing version history

- ✓ Restoring versions and using the recycle bin

Microsoft 365 SharePoint Administration

Duration	3 Days
Group Size	Up to 5 people maximum
Prerequisite	» A proficient understanding of basic functional experience with Microsoft 365 services. » A proficient understanding of general IT practices, including using PowerShell. » Basic understanding of Active Directory and Azure AD. » Basic understanding of mobile device management, and alternative operating systems (Android and macOS).
Course Type	Microsoft 365 — **Course code** — O365:SPAD
Training Room Requirements	» Meeting Room » TV/Projector » PC/Laptop with Windows 10
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams
Note	This course should take place before a cutover

COURSE DESCRIPTION

In this course, you will learn how to plan, configure, and manage SharePoint Sites and OneDrive to enable modern content services that transform the content lifecycle. Specifically, this course discusses the modern SharePoint site structure, such as SharePoint hub sites and provides best practices for the adoption and deployment of OneDrive within your organization.

This course is designed for IT Professionals who deploy and manage Microsoft SharePoint and OneDrive in their organizations. Students in this course are interested in Microsoft SharePoint and OneDrive.

COURSE CONTENT

Module 1: Plan and Configure SharePoint Sites

- ✓ Overview of SharePoint in Microsoft 365
- ✓ Configure SharePoint sites
- ✓ Manage SharePoint sites

Module 2: Configure and Manage OneDrive

- ✓ Overview of OneDrive in Microsoft 365
- ✓ Deploy OneDrive
- ✓ Manage OneDrive

Module 3: Sharing and Security in SharePoint and OneDrive

- ✓ Manage SharePoint site permissions
- ✓ Manage sharing in SharePoint and OneDrive
- ✓ Manage security in SharePoint and OneDrive

Module 4: Manage User Profiles and Apps

- ✓ Manage User Profiles
- ✓ Manage apps

Module 5: Plan and Configure Managed Metadata and Business Connectivity Services

- ✓ Plan and configure Managed Metadata
- ✓ Plan and configure Business Connectivity Services

Module 6: Plan and Configure Search

- ✓ Plan search
- ✓ Configure search

Microsoft 365 SharePoint Online Manager

Duration	3 Days
Group Size	Up to 5 people maximum
Prerequisite	» No prior knowledge is necessary, but a good level of IT literacy is required and a knowledge of the use of Microsoft 365 and SharePoint Online is advantageous.
Course Type	Microsoft 365 **Course code** O365:SPOM
Training Room Requirements	» Meeting Room » TV/Projector » PC/Laptop with Windows 10
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams
Note	This course should take place before a cutover

COURSE DESCRIPTION

This course is intended for people responsible for managing a SharePoint online environment within Microsoft 365/Microsoft 365. This course includes the skills needed to create and manage sites as a Site Owner as well as managing the SharePoint environment for the organisation including SharePoint as it supports Microsoft Teams.

COURSE CONTENT

Introduction to SharePoint Online

- ✓ What is SharePoint Online

- ✓ Sites vs Groups vs Teams

- ✓ Hub Sites, Site Collections & Sub Sites

- ✓ The Basics of SharePoint use

    - o Check in/Check Out

    - o Navigation

- o   Sort and Filter
- o   Versions
- o   Office Integration
- o   Usage Statistics

SharePoint Online Sites

- ✓   Designing your Architecture
- ✓   Creating and Managing Sites
- ✓   Creating from the Admin Center
- ✓   Managing Site Collection Features
- ✓   Managing Primary Site Admin
- ✓   Deleting Sites

SharePoint Online User Profiles

- ✓   What is the User Profile?
- ✓   Creating and Managing User Profiles

OneDrive for Business

- ✓   Using One Drive for Business
- ✓   OneDrive Admin Centre

Document Libraries

- ✓   Create a Document Library
- ✓   Modify Settings and Library Policies
- ✓   Create & Modify Columns
- ✓   Create & Modify Views
- ✓   Column & View Formatting
- ✓   Getting Started with Power Automate Integration

Lists

- ✓   SharePoint Lists vs Microsoft Lists
- ✓   Create a List from a Template
- ✓   Create a Custom List

- ✓ Modify Settings and List Policies
- ✓ Create & Modify Columns
- ✓ Create & Modify Views
- ✓ Column & View Formatting
- ✓ Getting Started with Power Automate Integration

Pages
- ✓ Create and Modify Pages
- ✓ News Pages
- ✓ Audience Targeting for Pages

Reusable Content
- ✓ Site Columns
- ✓ Site Content Types
- ✓ Managed Metadata

SharePoint & Teams Permissions
- ✓ Permissions Best Practice
- ✓ Default Permission Settings in SharePoint
- ✓ Giving People Access to the Site
- ✓ Creating Permission Groups
- ✓ Creating Permission Levels
- ✓ Setting Permissions on Apps (Lists/Libraries)
- ✓ Sharing Personal Lists
- ✓ External Sharing Settings in SharePoint and OneDrive
- ✓ Controlling Sharing Defaults for SharePoint
- ✓ Controlling Site Creating incl Groups
- ✓ What Team Members, Owners and Guests can do in Teams & SharePoint
- ✓ Allowing External Users Access
- ✓ Channel Permissions in Teams

Teams

- ✓ What are Teams?
- ✓ Creating and Joining Teams
- ✓ Adding Members and Owners to Teams
- ✓ File Organisation in Teams
- ✓ Adding Files
- ✓ Editing Files
- ✓ Using Tabs to integrate with other systems/information incl within Microsoft 365
- ✓ Using the Team from Outlook, Planner, OneDrive and SharePoint

SharePoint As a Backend to Teams

- ✓ Navigating the SharePoint site created by Teams
- ✓ Understanding what maps to what between SharePoint & Teams

Introduction to Security and Compliance

- ✓ Introduction to Security & Compliance Center
- ✓ Overview - Data Loss Prevention
- ✓ Overview - Data Privacy
- ✓ Overview - Data Governance
- ✓ Overview – Threat Management
- ✓ The Microsoft Secure Score

Microsoft 365 OneNote

Duration	90 minutes
Group Size	Up to 10 people maximum
Prerequisite	No Prerequisite
Course Type	Microsoft 365 **Course code** O365:ONNO
Training Room Requirements	» Meeting Room » TV/Projector » PC/Laptop with OneNote per user
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams
Note	This course should take place before a cutover

COURSE DESCRIPTION

OneNote is an idea processor, a notebook and an information organizer.

This course will show users the basics of OneNote. They will be shown how to quickly capture meeting notes, brainstorming notes, ideas and thoughts, audio from discussions, video from interviews, diagrams, and so on using the keyboard or the recording capabilities in OneNote.

COURSE CONTENT

Upon successful completion, delegates will be able to:

OneNote Basics

- ✓ Accessing OneNote
- ✓ Create a Notebook
- ✓ Notebook structure
- ✓ Organising your Notebook
    - o Add Sections

- o Add Pages
- o Move Sections
- o Move Pages
- o Quick Notes
- ✓ Notebook Ribbon
- ✓ Home Tab
- ✓ Tags
  - o To Do tags and Outlook Tasks
  - o Search Notebooks

- ✓ Insert tab
  - o Meeting details
  - o Add Text and Tables
  - o Add Pictures/Screen Clippings
  - o Add Links
  - o File Printout Vs File Attachment
  - o Images, Media & Recordings
  - o Screen Recordings
- ✓ Sending email to OneNote
- ✓ Saving a Notebook

Sharing & Collaboration

- ✓ Notebook Information
- ✓ Sharing Options
- ✓ Synchronising a Notebook
- ✓ Password protect a section
- ✓ Version History

Working with a OneNote Online Notebook

- ✓ Typing Content
- ✓ Working with Tables

Create Meeting Minutes from Outlook

✓ Using the OneNote button in Outlook to create a Minutes page

Other Features

✓ Calculator

✓ Draw Tools

✓ Send to Email

✓ Send to Word

✓ Templates

Windows 10 Familiarisation End user training

Duration	60 minutes
Group Size	Up to 10 people maximum
Prerequisite	No Prerequisite
Course Type	Microsoft 365 **Course code** O365:FEUT
Training Room Requirements	» Meeting Room » TV/Projector » PC/Laptop with Windows 10
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams
Note	This course should take place before a cutover

COURSE DESCRIPTION

This course will familiarise users with all of the new features Windows 10 has to offer and enable them to discover and become more comfortable with the operating system.

This course can be completely customised for each client as appropriate.

COURSE CONTENT

Upon successful completion, delegates will be able to:

- ✓ Use the windows search bar to find programs
- ✓ Resizing tiles and personalise the start menu
- ✓ Create desktop shortcuts
- ✓ Use the quick access feature to access files and folders more efficiently
- ✓ Use the snap feature to work on multiple applications at once
- ✓ Shake and minimise programs
- ✓ Toggle between applications

- ✓ Adjust screen brightness

- ✓ Adjust volume

- ✓ Mousepad Controls using figure gestures

- ✓ Pinch and Zoom

- ✓ Extend display to a second monitor

- ✓ Change cursor control across multiple screens

- ✓ Use windows keyboard shortcuts

- ✓ Understand and utilise the system tray

- ✓ Use Quick Access

Microsoft 365 Introduction

Duration	90 minutes
Group Size	Up to 10 people maximum
Prerequisite	A basic understanding of Office 2013 and Outlook A basic knowledge of Office applications (Word, Excel, Outlook).
Course Type	Microsoft 365 — **Course code** — O365:INTRO
Training Room Requirements	» Meeting Room » TV/Projector » PC/Laptop with Delve per user
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams
Note	This course should take place before a cutover

COURSE DESCRIPTION

This course will provide users with an overview and introduction of the most useful features of Microsoft 365. This will include general navigation and customisation features of the user's profiles.

This course can be completely customised for each client as appropriate

COURSE CONTENT

Delegates will undertake the following modules:

Module 1: Microsoft 365 Overview

- ✓ Introducing Cloud Computing

- ✓ Identify and Outline the Component Products in Microsoft 365 including Outlook Web App, Office Online Apps, and OneDrive.

- ✓ Navigating around Microsoft 365

- ✓ Customising the Microsoft 365 Nav Bar

✓ Updating your Profile in Microsoft 365

Module 2: Using the Outlook Online Application

✓ Overview of Outlook Online

✓ Working with Email and Folders

✓ Outlook People and IM Contacts

✓ Using the Calendar

✓ Shared Calendars

✓ Outlook Tasks in the Web App

✓ Setting Outlook Options, Signatures, Automatic Replies and Rules

Excel Core Essentials 1 & 2

Duration	3 hours for each session (full day for both)		
Group Size	Up to 10 people maximum		
Prerequisite	No Prerequisite		
Course Type	Microsoft 365	Course code	O365:EXCE:C O365:EXCE:C:1 O365:EXCE:C2
Training Room Requirements	» Meeting Room » TV/Projector » PC/Laptop with Windows 10		
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams		
Note	This course should take place before a cutover		

COURSE DESCRIPTION

This course is for new and existing users of Excel who wish to acquire the basic skills required o create, edit, format and print spreadsheets effectively.

You can choose to do Core essentials session 1 or 2 or both depending on your requirements.

COURSE CONTENT

Delegates will undertake the following modules:

Core essentials session 1-

Introduction

- ✓ Using the ribbon, Quick Access Toolbar & keyboard shortcuts
- ✓ Creating a new workbook
- ✓ Entering, editing & deleting data
- ✓ Autofilling data

Excel Core Essentials sessions 2 -

Formatting

- ✓ Aligning data
- ✓ Changing text and number formats
- ✓ Copying formats using the Format Painter
- ✓ Merging & splitting cells
- ✓ Applying borders and shading

- ✓ Working with SmartTags
- ✓ Saving, closing & opening a workbook
- ✓ Using zoom
- ✓ Data navigation and selection
- ✓ Undo & redo

Formulas

- ✓ Creating and editing basic formulas
- ✓ Using AutoSum
- ✓ Copying formulas
- ✓ Creating basic statistical functions
- ✓ Using absolute cell addresses
- ✓ AutoCalculate

Editing

- ✓ Inserting & deleting cells, columns and rows (and the impact on formulas)
- ✓ Changing the size of columns & rows

Editing

- ✓ Checking spelling
- ✓ Finding and replacing cell contents
- ✓ Moving and copying data
- ✓ Using the Clipboard

Printing

- ✓ Using Print Preview
- ✓ Changing worksheet orientation
- ✓ Setting headers and footers
- ✓ Additional Page Setup features
- ✓ Printing

Excel Intermediate 1 & 2

Duration	3 hours for each session (full day for both)		
Group Size	Up to 10 people maximum		
Prerequisite	No Prerequisite		
Course Type	Microsoft 365	Course code	O365:EXCE:I O365:EXCE:I:1 O365:EXCE:I2
Training Room Requirements	» Meeting Room » TV/Projector » PC/Laptop with Windows 10		
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams		
Note	This course should take place before a cutover		

COURSE DESCRIPTION

This course is for existing users of Excel who wish to improve competence working with calculations, large spreadsheets, and lists.

You can choose to do Intermediate session 1 or 2 or both depending on your requirements.

COURSE CONTENT

Delegates will undertake the following modules:

Excel Intermediate session 1-

Formulas and Functions

- ✓ Revision of basic formulas & AutoSum
- ✓ Creating statistical functions
- ✓ Using absolute & mixed cell addresses
- ✓ Using the Insert Function button

Excel Intermediate session 2-

Lists

- ✓ Sorting lists
- ✓ Filtering lists
- ✓ AutoSum with lists
- ✓ Formatting a list as a table

Managing Large Worksheets

- ✓ Testing data using the IF function (to include IFS)
- ✓ The ERROR function

Formula Auditing

- ✓ Tracing precedents and dependents
- ✓ Tracing errors
- ✓ Showing formulas

Multiple Worksheets

- ✓ Inserting & deleting worksheets
- ✓ Colour-coding worksheet tabs
- ✓ Moving and copying worksheets
- ✓ Grouping worksheets for formatting and printing
- ✓ Linking cells between worksheets
- ✓ Creating calculations across worksheets

- ✓ Freezing columns and rows
- ✓ Splitting the screen
- ✓ Hiding & unhiding columns and rows

Printing

- ✓ Printing a selection
- ✓ Setting & clearing print areas
- ✓ Scaling a sheet to fit
- ✓ Centring horizontally & vertically
- ✓ Inserting & removing page breaks
- ✓ Headers & footers revision
- ✓ Repeating titles on each page

Windows 10 Upgrade Outlook

Duration	60 minutes		
Group Size	Up to 10 people maximum		
Prerequisite	No Prerequisite		
Course Type	Microsoft 365	Course code	O365:OULO:U
Training Room Requirements	» Meeting Room » TV/Projector » PC/Laptop with Windows 10		
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams sessions » Attendees must have access to a PC/ Laptop that can access Microsoft Teams		
Note	This course should take place before a cutover		

COURSE DESCRIPTION

This course will familiarise users with some of the new features Microsoft Outlook has to offer and enable them to discover and become more comfortable with the operating system.

This course can be completely customised for each client as appropriate

COURSE CONTENT

Upon successful completion, delegates will be able to:

- ✓ Outlook views: To do bar and Reading pane options
- ✓ Message preview option
- ✓ Zoom slider
- ✓ Add Outlook functions to quick access
- ✓ Customizing your Ribbon
- ✓ Calendar Shortcuts
- ✓ Archiving your Emails with Enterprise Vault

- ✓ Conditional formatting your unread messages to make them more obvious

- ✓ Personalising the order of the icons available on the inbox bar (when arrow is expanded)

- ✓ Changing the background of outlook.

- ✓ Messages with participants at the bottom

- ✓ IM from an email

- ✓ Screenshots

- ✓ Rules (moving emails to folders etc)

- ✓ Moving folders

- ✓ Weather (Calendar)

- ✓ Out of Office for more than one mailbox

Windows 10 Upgrade Word

Duration	90 minutes
Group Size	Up to 10 people maximum
Prerequisite	No Prerequisite
Course Type	Microsoft 365 **Course code** O365:WORD
Training Room Requirements	» Meeting Room » TV/Projector » PC/Laptop with Windows 10
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams
Note	This course should take place before a cutover

COURSE DESCRIPTION

This course will familiarise users with some of the new features Microsoft Word has to offer and enable them to discover and become more comfortable with the operating system.

This course can be completely customised for each client as appropriate.

COURSE CONTENT

Upon successful completion, delegates will be able to:

- ✓ Word Basics
- ✓ Searching in Word
- ✓ Customising the Ribbon & Toolbar
- ✓ File Sharing & Collaboration
- ✓ Page layout, Text, and Paragraph format
- ✓ Pictures, Clipping, Tables, Clipart, 3D ClipArt
- ✓ Customising Word Templates

- ✓ Spelling, Grammar, Auto Correct, Dictation,
- ✓ References & Citation
- ✓ Review
- ✓ Version History
- ✓ Understand new features – Smart Lookup & Insights
- ✓ Use the 'Tell Me' search bar
- ✓ Find your previous location
- ✓ Hide white space
- ✓ Insert Hyperlinks
- ✓ Change the default font
- ✓ Delete entire words at a time
- ✓ View documents side by side
- ✓ See all the symbols

Windows 10 Upgrade PowerPoint

Duration	90 minutes		
Group Size	Up to 10 people maximum		
Prerequisite	No Prerequisite		
Course Type	Microsoft 365	Course code	O365:POPO
Training Room Requirements	» Meeting Room » TV/Projector » PC/Laptop with Windows 10		
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams		
Note	This course should take place before a cutover		

COURSE DESCRIPTION

This course will familiarise users with some of the new features Microsoft PowerPoint has to offer and enable them to discover and become more comfortable with the operating system.

This course can be completely customised for each client as appropriate.

COURSE CONTENT

Upon successful completion, delegates will be able to:

- ✓ PowerPoint Basics
- ✓ Searching in PowerPoint
- ✓ Customising the Ribbon & Toolbar
- ✓ File Sharing & Collaboration
- ✓ Screen Clipping
- ✓ Rehearse Timings & Screen Recordings
- ✓ Closed Captions

- ✓ Customising Powerpoint Templates

- ✓ 3D Clipart & Icons

- ✓ Text, Tables, and Graphics

- ✓ Version History

- ✓ Understand new features – Smart Lookup & Insights

- ✓ Use the eyedropper tool

- ✓ Use the Zoom tool

- ✓ Insert Hyperlinks

Microsoft 365 Groups

Duration	90 minutes		
Group Size	Up to 10 people maximum		
Prerequisite	Microsoft 365 account Groups enabled Familiarity with Outlook		
Course Type	Microsoft 365	Course code	O365:GROU
Training Room Requirements	» Meeting Room » TV/Projector » PC/Laptop with access to Microsoft 365		
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams		
Note	This course should take place before a cutover		

COURSE DESCRIPTION

This course will provide users with an overview and introduction of the most useful features of Microsoft 365 Groups. The module is structured to provide an overview of Groups as a collaborative tool. It will highlight key features and processes that can be followed to work with content, people or document.

COURSE CONTENT

Upon successful completion, delegates will be able to:

Using and Managing Groups to Collaborate

- ✓ Introduction to Groups
- ✓ Creating Groups and Setting Options
- ✓ Collaboration using Groups
- ✓ Managing Groups as an Owner
- ✓

Applications

- ✓ Creating a group in Outlook
- ✓ Creating a group in Yammer
- ✓ Creating a Team site in SharePoint Online
- ✓ Create a plan in Microsoft Planner

Microsoft 365 Delve

Duration	90 minutes
Group Size	Up to 10 people maximum
Prerequisite	No Prerequisite
Course Type	Microsoft 365 **Course code** O365:DELV
Training Room Requirements	» Meeting Room » TV/Projector » PC/Laptop with Delve per user
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams
Note	This course should take place before a cutover

COURSE DESCRIPTION

This course will familiarise users with the Delve cloud-based collaboration tool. Attendees will be provided with appropriate knowledge to create, edit and share documents with colleagues.

An overview of the mobile application is also included within this training.

COURSE CONTENT

Upon successful completion, delegates will be able to:

- ✓ Set up their profile

- ✓ Create a Board

- ✓ View Content

- ✓ Search for Colleagues

- ✓ Group Documents

- ✓ Share documents with Colleagues

- ✓ Make documents Private

✓ Manage Favourites, Content and People

✓ Access and use the Mobile App

Microsoft 365 Forms

Duration	90 minutes
Group Size	Up to 10 people maximum
Prerequisite	No Prerequisite
Course Type	Microsoft 365 **Course code** O365:FORM
Training Room Requirements	» Meeting Room » TV/Projector » PC/Laptop with Forms per user
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams
Note	This course should take place before a cutover

COURSE DESCRIPTION

Microsoft forms is a new surveying tool. Forms provides the opportunity for a survey author to quickly and easily create individually customised surveys, questionnaires, quizzes and so on.

This course will familiarise users with the various formats and question structures available to choose from to create an individual form.

This course has been created in mind for new users wishing to start to explore a new and easy way to create questionnaires, surveys and so on by the use of O365 Forms.

COURSE CONTENT

Upon successful completion, delegates will be able to:

Microsoft Forms Overview:

- ✓ Concepts
- ✓ Accessing the Forms app
- ✓ Navigating around forms

Creating Forms and Adding Questions:

- ✓ Creating forms
- ✓ Understanding question types
- ✓ Setting question options
- ✓ Branching
- ✓ Adding themes to forms
- ✓ Preview and review
- ✓ Setting form options
- ✓ Sharing forms with options
- ✓ Reviewing responses
- ✓ Practical activity – create and share a form

Quizzes:

- ✓ Creating a quiz
- ✓ Adding questions
- ✓ Question types

Setting question options including: types, correct answers and responses, maths and equations:

- ✓ Add a theme
- ✓ Preview and test the quiz
- ✓ Setting quiz options
- ✓ Sharing the quiz
- ✓ Reviewing responses
- ✓ Practical activity – create and share a quiz

Outlook for Microsoft 365 - Basic

Duration	90 minutes
Group Size	Up to 10 people maximum
Prerequisite	No Prerequisite
Course Type	Microsoft 365 **Course code** O365:OULO:B
Training Room Requirements	» Meeting Room » TV/Projector » PC/Laptop with Outlook per user
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams
Note	This course should take place before a cutover

COURSE DESCRIPTION

This course will familiarise users with some of the new features Microsoft Outlook has to offer and enable them to discover and become more comfortable with the operating system.

This course can be completely customised for each client as appropriate

COURSE CONTENT

Upon successful completion, delegates will be able to:

Outlook Onboarding/Basics

- ✓ Logging In
- ✓ Outlook Overview
- ✓ Outlook Ribbon Overview
- ✓ New Email
- ✓ Basic formatting of emails
- ✓ Adding an Attachment
- ✓ Sending an Email

- ✓ Replying to an Email
- ✓ Forwarding an Email
- ✓ Delete an Email
- ✓ Flag an Email
- ✓ Outlook - Email Retention Policy (If applicable)
- ✓ Outlook - Search All Documents
- ✓ Outlook - Moving Outlook Items from Sent Items
- ✓ Email from Teams (Groups)
- ✓ Out of Office
- ✓ Turn off focused inbox and email threads
- ✓ Outlook (Windows) - Opening Multiple Windows
- ✓ Outlook Contacts (Personal Contacts)

Email

- ✓ Sensitivity labels
- ✓ Outlook views
- ✓ Quick access Toolbar (Windows only)
- ✓ Screenshots (Windows only)
- ✓ Applying an importance to an email
- ✓ Recall email (Windows only)
- ✓ Favourites

Calendar

- ✓ Calendar intro
- ✓ Calendar view
- ✓ Meeting Invite
- ✓ Schedule webex meetings from outlook
- ✓ Scheduling Assistant
- ✓ Tracking meeting responses
- ✓ Add person to existing meeting
- ✓ Forwarding a meeting
- ✓ Creating recurring meetings

Outlook for Microsoft 365 - Advanced

Duration	90 minutes		
Group Size	Up to 10 people maximum		
Prerequisite	Outlook 2016 Basic		
Course Type	Microsoft 365	Course code	O365:OULO:A
Training Room Requirements	» Meeting Room » TV/Projector » PC/Laptop with Outlook per user		
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams		
Note	This course should take place before a cutover		

COURSE DESCRIPTION

This course will familiarise users with some of the new features Microsoft Outlook has to offer and enable them to discover and become more comfortable with the operating system.

This course can be completely customised for each client as appropriate

COURSE CONTENT

Upon successful completion, delegates will be able to:

Email

- ✓ Organising the inbox
- ✓ Creating/Moving folders
- ✓ Creating rules
- ✓ Intro to tags
- ✓ Using categories
- ✓ Flagging emails

- ✓ Follow up Flags
- ✓ Tasks (To Do)
- ✓ Conditional Formatting
- ✓ Out of office for other mailboxes
- ✓ Remove outdated auto complete addresses
- ✓ Reply with IM
- ✓ Using @mentions in an email
- ✓ Automatic spell checker
- ✓ Delay/schedule an email
- ✓ Deleting and recovering emails
- ✓ Quick steps

Calendar

- ✓ Calendar sharing and delegate access
- ✓ Sharing your own outlook calendar
- ✓ Calendar permissions
- ✓ Stop sharing calendar
- ✓ Open another person's calendar
- ✓ Viewing multiple calendars
- ✓ Print list of attendees from meeting request

Contacts

- ✓ Adding contacts
- ✓ Contact card characteristics
- ✓ Create contact groups (previously known as distribution lists)
- ✓ Creating email and calendar templates
- ✓ Sending email to contact groups

Microsoft 365 Outlook - Web

Duration	90 minutes		
Group Size	Up to 10 people maximum		
Prerequisite	Outlook 365 - Basic		
Course Type	Microsoft 365	Course code	O365:OULO:W
Training Room Requirements	» Meeting Room » TV/Projector » PC/Laptop with Outlook per user		
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams		
Note	This course should take place before a cutover		

COURSE DESCRIPTION

This Course will familiarise users with the features of Microsoft 365 Outlook for Web.

COURSE CONTENT

Completion of the course delegates will be proficient in:

E-Mail Functions:

- ✓ Introduction to the mail interface
- ✓ Create a message
- ✓ Create an automatic reply (out of office)
- ✓ Create and e-mail signature

Calendar Functions:

- ✓ Introduction to the calendar interface
- ✓ Create an appointment (You Only)
- ✓ Propose a meeting (you plus others)
- ✓ Share your calendar

Contacts:

- ✓ Create a contact
- ✓ Create a contact group

Microsoft 365 Yammer

Duration	45 minutes
Group Size	Up to 10 people maximum
Prerequisite	No Prerequisite
Course Type	Microsoft 365	**Course code**	O365:YAMM
Training Room Requirements	» Meeting Room » TV/Projector » PC/Laptop with access to Yammer per user
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams
Note	This course should take place before a cutover

COURSE DESCRIPTION

Yammer is a private and secure enterprise social network. Users will be shown how to connect with their colleagues as well as collaborate and coordinate.

COURSE CONTENT

Upon successful completion, delegates will be able to:

Introduction to Yammer and Getting Started

- ✓ Accessing the Yammer App
- ✓ View and Update your Profile

Discussions and Groups

- ✓ Create a Group
- ✓ Join an Existing Group
- ✓ Discover Conversations

- ✓ Create and Respond to Posts
- ✓ Praising a Collaborator
- ✓ Announcements and Polls
- ✓ Set Notifications and Follows

Topic C: Collaborate and Share:

- ✓ Create a Document
- ✓ Upload an Existing Document
- ✓ Co-editing Documents
- ✓ Sharing Content from Microsoft 365

Microsoft 365 Flow

Duration	90 minutes		
Group Size	Up to 5 people maximum		
Prerequisite	No Prerequisite		
Course Type	Microsoft 365	Course code	O365:FLOW
Training Room Requirements	» Meeting Room » TV/Projector » PC/Laptop with Flow per user		
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams		
Note	This course should take place before a cutover		

COURSE DESCRIPTION

Microsoft Flow is an online workflow service that automates actions across the most common apps and services. Users will learn how to build flows using Microsoft Flow and how to use templates to automate tasks.

COURSE CONTENT

Upon successful completion, delegates will be able to:

- ✓ Learn what Microsoft Flow is and how it can be used

- ✓ Login to the Microsoft flow portal

- ✓ Use a template to create a flow

- ✓ Create a flow with a template

- ✓ Test your flow

- ✓ Edit and manage your flows

- ✓ Create a flow in SharePoint

- ✓ Create an approval flow

- ✓ Use an approval flow

- ✓ Create a button flow to send yourself a reminder

- ✓ Create a flow that sends you notifications

- ✓ Create a flow that copies files

- ✓ Create a flow that runs on a schedule

- ✓ Create a flow that posts tweets

- ✓ Create a flow that your team can use

- ✓ Managing and sharing flows

Microsoft 365 Power Bi Basic Custom Reports

Duration	2 days		
Group Size	Up to 5 people maximum		
Prerequisite	Power BI Desktop Power Bi Pro License		
Course Type	Microsoft 365	**Course code**	O365:POBI:B
Training Room Requirements	» Meeting Room » TV/Projector » PC/Laptop with Power BI per user		
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams		
Note	This course should take place after Go Live		

COURSE DESCRIPTION

Power BI is a suite of business analytics tools to analyse data and share insights. Power BI Desktop transforms your company's data into rich visuals for you to monitor your business and get answers quickly with rich dashboards available on every device.

The course is intended for people who want to use all the capabilities of the Power BI platform to build self-serviced business intelligence solutions.

COURSE CONTENT

Upon successful completion, delegates will be able to:

Students will learn:

- ✓ Anywhere365® Power Bi Integration
- ✓ Power BI Desktop Features
- ✓ Power BI Concepts and Terms
- ✓ Manage Data Visualizations
- ✓ Manage DAX formulas

- ✓ Publish and Share Power BI Report
- ✓ Customize and Share Anywhere365® Visualizations (Reports)

Power BI Desktop Introduction

- ✓ Get Power BI Desktop
- ✓ Overview and Terminology
- ✓ Imports
- ✓ Visualizations
- ✓ Filters and Queries
- ✓ Reports
- ✓ Power BI Personal Gateway

Data Sources

- ✓ Compatible Data Sources
- ✓ Get Data and Query Editor
- ✓ Direct Query vs Import Data
- ✓ Defining Hierarchies based on a single Table
- ✓ Set up and Manage Relationships between Tables
- ✓ Use Append Queries
- ✓ Merge Data Tables

Visualizations

- ✓ Creating Visualisations
- ✓ Colour Formatting
- ✓ Setting Sort Order
- ✓ Scatter and Bubble Charts
- ✓ Slicers, Timeline Slicers & Sync Slicers
- ✓ Cross Filtering and Highlighting
- ✓ Visual, Page and Report Level Filters
- ✓ Drill Up, Down and Through
- ✓ Hierarchies
- ✓ Reference / Constant Lines
- ✓ Tables, Matrices & Conditional Formatting

- ✓ KPI's, Cards and Gauges
- ✓ Map Visualizations
- ✓ Custom Visuals
- ✓ Custom Report Themes
- ✓ Grouping and Binning
- ✓ Selection Pane and Bookmarks

Querying Data

- ✓ Query Editor
- ✓ Filters and Delimiters
- ✓ Transforms
- ✓ Pivot and Group By
- ✓ Creating Custom Calculated Columns
- ✓ Adding Conditional Columns
- ✓ Introduction to Data Analysis Expression (DAX)
- ✓ Histograms

Reports and Exports

- ✓ Personal vs App Workspaces
- ✓ Power BI Service
- ✓ Report Elements and Options
- ✓ Working with Pages
- ✓ Adding Graphics
- ✓ Report Level Filters
- ✓ Report Themes
- ✓ Export Power BI Data to CSV
- ✓ Create a Power BI Template

Sharing Content

- ✓ Sharing Dashboards with internal and External users
- ✓ Sharing content with Office 365 groups
- ✓ Creating Power BI Apps
- ✓ Consuming Power BI Apps
- ✓ Using Publish to Web with Dashboards

Power Automate – Reports Scheduler

Duration	1 day
Group Size	Up to 5 people maximum
Prerequisite	Must have completed Power Bi Basic Custom Reports course Power BI Desktop Power Bi Pro License
Course Type	Microsoft 365 **Course code** O365:PARS
Training Room Requirements	» Meeting Room » TV/Projector
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams
Note	This course should take place after Go Live

COURSE DESCRIPTION

Power BI is a suite of business analytics tools to analyse data and share insights. Power BU Desktop transforms your company's data into rich visuals for you to monitor your business and get answers quickly with rich dashboards available on every device.

The course is intended for people who have completed the custom reporting training and want to further their knowledge.

COURSE CONTENT

Upon successful completion, delegates will be able to understand the following:

Introduction to MS Power Automate

- ✓ What Is Microsoft Power Automate?
- ✓ Using Power Automate with SharePoint
- ✓ Using Power Automate outside Microsoft 365
- ✓ Licensing
- ✓ Connectors

Microsoft Power Automate Basics

- ✓ Opening MS Power Automate
- ✓ Creating from Templates
- ✓ Understanding Tools and Navigation
- ✓ Creating from Blank
- ✓ Connections
- ✓ Data Gateways

Using Triggers

- ✓ SharePoint List Triggers
- ✓ SharePoint Library Triggers
- ✓ Outlook Triggers
- ✓ OneDrive Triggers
- ✓ Social Media Triggers
- ✓ Other Triggers

Using Actions

- ✓ SharePoint Actions
- ✓ Outlook Actions
- ✓ Schedule Actions
- ✓ Social Media Actions

Microsoft 365 Power Bi Advanced Custom Reports

Duration	1 day		
Group Size	Up to 5 people maximum		
Prerequisite	Must have completed Power Bi Basic Custom Reports course Power BI Desktop Power Bi Pro License		
Course Type	Microsoft 365	**Course code**	O365:POBI:A
Training Room Requirements	» Meeting Room » TV/Projector » PC/Laptop with Power BI per user		
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams		
Note	This course should take place after Go Live		

COURSE DESCRIPTION

Power BI is a suite of business analytics tools to analyse data and share insights. Power BI Desktop transforms your company's data into rich visuals for you to monitor your business and get answers quickly with rich dashboards available on every device.

This course is intended for people who have completed the custom reporting course, and want to further their knowledge

COURSE CONTENT

Upon successful completion, delegates will be able to:

Power BI App

- ✓ Supported Platforms
- ✓ Creating Dashboards for Mobile devices
- ✓ Accessing Reports and Dashboards from Mobile

Data Analysis Expression (DAX)

- ✓ Dax Overview
- ✓ Dax Data Types and Operators
- ✓ Common Dax Functions
- ✓ Referencing Other Tables in Dax
- ✓ Using Calculate
- ✓ Earlier and Earliest

Microsoft 365 Visio

Duration	½ day		
Group Size	Up to 5 people maximum		
Prerequisite	No Prerequisite		
Course Type	Microsoft 365	Course code	O365:VISI
Training Room Requirements	» Meeting Room » TV/Projector » PC/Laptop with Flow per user		
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams		
Note	This course should take place before a cutover		

COURSE DESCRIPTION

Microsoft Visio allows you to communicate complex business information clearly, through the use of visual diagrams. Diagrams and charts play a pivotal role in knowledge dissemination, making complex data easy to understand. Microsoft Office Visio has a host of features that are instrumental in creating pictorial representations of information.

In this course, users will learn how to use Visio to create basic flow charts and Organisational Charts and will design and manage organisation charts as well as basic flow charts.

COURSE CONTENT

Upon successful completion, delegates will be able to:

Visio Basics

- ✓ Getting Started with Visio
- ✓ Using Page Setup
- ✓ Using Print Preview
- ✓ Printing a Drawing

Creating a Drawing

- ✓ Beginning a New Drawing
- ✓ Add Shapes to a Drawing

Connecting Shapes

- ✓ Using Connectors
- ✓ Connecting Shapes Automatically

Working with Text

- ✓ Adding Text to Shapes
- ✓ Creating Text-Only Shapes
- ✓ Editing Existing Text
- ✓ Modifying a Text Block
- ✓ Formatting Text

Creating Flow Charts

- ✓ Working with the Flow Chart Templates
- ✓ Using Flow Chart Stencils
- ✓ Linking between pages
- ✓ Aligning Shapes
- ✓ Distributing Shapes
- ✓ Flow Chart Designs

Creating Organisation Charts

- ✓ Working with the Org Chart Wizard
- ✓ Using the Org Chart Wizard to Import Data
- ✓ Working with the Org Chart Templates
- ✓ Using the Org Chart Ribbon and Stencils
- ✓ Linking Between Pages

Microsoft 365 Project- Introduction

Duration	1 day
Group Size	Up to 5 people maximum
Prerequisite	No Prerequisite
Course Type	Microsoft 365 **Course code** O365:PROJ
Training Room Requirements	» Meeting Room » TV/Projector » PC/Laptop with Flow per user
Remote Training Requirements	» Sessions will be hosted using either Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams
Note	This course should take place before a cutover

COURSE DESCRIPTION

Microsoft Project is a powerful Project Management tool which can be used to develop a plan, create tasks, assign resources, manage budgets and analyse workloads so that you stay organised and focussed. It can be used in a variety of industries including construction, manufacturing, local government, retail, financial services and healthcare.

At the end of the course, delegates should be able to create a basic project schedule of tasks. This is not a course designed for newcomers to computing.

COURSE CONTENT

The following gives a brief overview of the course content. This is only a suggestion and may be tailored to better suit the delegates' requirements.

The Project Interface and Screen

- ✓ Working with views, tables, forms
- ✓ Timeline View
- ✓ Navigating

Calendars

- ✓ Set up non-working time
- ✓ Changing the working hours
- ✓ Edit the Standard calendar
- ✓ Create and assign a base calendar
- ✓ Edit resource calendars
- ✓ Task calendars

Compiling the Task List

- ✓ Automatic and Manual Scheduling
- ✓ Entering/editing tasks
- ✓ Durations
- ✓ Creating milestones
- ✓ Inserting recurring tasks;
- ✓ Rearranging, inserting and deleting tasks

Outlining

- ✓ Creating Summary Tasks
- ✓ Showing/hiding subtasks
- ✓ Outline numbers
- ✓ Project Summary Task

Task Dependencies

- ✓ Linking tasks and task relationships
- ✓ Creating delays and overlaps using lags and leads
- ✓ Splitting tasks

Task Constraints and Deadlines

- ✓ How Task Constraints work
- ✓ Viewing constraints
- ✓ Deadlines

Reviewing the Schedule

  ✓   Displaying the critical path

  ✓   Identifying slack time

Formatting the Gantt Chart

  ✓   Adding gridlines

  ✓   Formatting text and Gantt bars

Task Notes

  ✓   Adding, editing and printing task and project notes

Printing

  ✓   Previewing and printing the schedule

  ✓   Adding headers and footers

Microsoft 365 Project- Intermediate

Duration	1 day		
Group Size	Up to 5 people maximum		
Prerequisite	No Prerequisite		
Course Type	Microsoft 365	Course code	O365:PROJ:I
Training Room Requirements	» Meeting Room » TV/Projector » PC/Laptop with Flow per user		
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams		
Note	This course should take place before a cutover		

COURSE DESCRIPTION

Microsoft Project is a powerful Project Management tool which can be used to develop a plan, create tasks, assign resources, manage budgets and analyse workloads so that you stay organised and focussed. It can be used in a variety of industries including construction, manufacturing, local government, retail, financial services and healthcare.

At the end of the course, delegates will be able to assign and manage resources, add actuals and monitor the project schedule.

COURSE CONTENT

The following gives a brief overview of the course content. This is only a suggestion and may be tailored to better suit the delegates' requirements.

Recap on Setting up a Task Schedule

- ✓ Setting a start date
- ✓ Creating a work breakdown structure
- ✓ Linking tasks and changing relationships
- ✓ Lags and leads
- ✓ Date constraints

Resources

- ✓ Resource types
- ✓ Setting up the resource pool

Working with Resources

- ✓ Assigning resources
- ✓ Understanding resource information
- ✓ Managing over allocations

Project Costs

- ✓ Entering Resource and Fixed costs into the schedule
- ✓ Viewing costs

Monitoring the Project

- ✓ Setting a baseline
- ✓ Inputting actuals
- ✓ Tracking and updating the project schedule

The Reports

- ✓ Viewing and printing the built-in reports
- ✓ Customising the reports

Filters and Grouping

- ✓ Using Autofilter
- ✓ Using built-in filters
- ✓ Grouping tasks

Working with Multiple Projects

- ✓ Combining project files
- ✓ Linking tasks across projects
- ✓ Working with shared resource pools
- ✓ Managing over allocations of work across files

Microsoft Dynamics 365

Duration	½ day
Group Size	Up to 5 people maximum
Prerequisite	No Prerequisite
Course Type	Microsoft 365 **Course code** O365:DYNA
Training Room Requirements	» Meeting Room » TV/Projector » PC/Laptop with Flow per user
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams
Note	This course should take place before a cutover

COURSE DESCRIPTION

Microsoft Dynamics 365 is a cloud-based business applications platform that combines components of customer relationship management (CRM) and enterprise resource planning (ERP), along with productivity applications and artificial intelligence tools.

This course provides information on the basic concepts of Microsoft Dynamics 365. It discusses some of the terms, concepts and many of the components that make up the Microsoft Dynamics 365 system. In addition, it provides an overview of information about application navigation, setting up accounts, contacts and activities, using the sales, customer service, and marketing processes within Microsoft Dynamics 365.

This course helps prepare you for assessment Microsoft Dynamics 365 Enterprise for Customer Service.

COURSE CONTENT

Upon successful completion, delegates will be able to:

✓ Discover how to navigate through various client types

✓ Work with records through various client types

- ✓ Explore the different action types that can be taken on a record
- ✓ Track activities and data in Outlook
- ✓ Dive deeper into views and how they are utilized
- ✓ Review how to search for data using Global Search
- ✓ Recognize the role of leads within Microsoft Dynamics 365
- ✓ Examine the Lead to Opportunity Process Flow
- ✓ Discuss communication tracking
- ✓ Explore case types
- ✓ Review the basic steps of the marketing process
- ✓ Recognize how to plan and budget a marketing campaign
- ✓ Examine marketing lists and how they can be used
- ✓ Discuss quick campaign and when to use a marketing campaign

Microsoft Sway

Duration	60 minutes
Group Size	Up to 5 people maximum
Prerequisite	No Prerequisite
Course Type	Microsoft 365 **Course code** O365:SWAY
Training Room Requirements	» Meeting Room » TV/Projector » PC/Laptop with Delve per user
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams

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COURSE DESCRIPTION

Microsoft Sway is a presentation tool in Microsoft's Office suite of business productivity apps. Sway is designed to replace Microsoft PowerPoint for visual presentations and storytelling. But unlike PowerPoint, Sway aims to present to a digital audience, not a live audience. The presentation in Sway takes place via cards that create a storyline, and these cards can be edited or the sequence of them can be changed.

This course will help attendees to know and demonstrate the correct application and familiarize you with the basic principal features and functions of Microsoft Sway so that you can use them effectively and efficiently in your real-world environment.

COURSE CONTENT

Upon successful completion, delegates will be able to:

- ✓ Understanding Sway
- ✓ Creating a new Sway
- ✓ Adding Cards and Groups
- ✓ Using media and other content types in your Sway
- ✓ Different ways to host and share your Sway

Go Live Support

Duration	8 hours per day		
Group Size	Typically 1 trainer per 50 users		
Prerequisite	No Prerequisite		
Course Type	Go Live Support	Course code	O365:GLSU
Training Room Requirements	N/A		
Remote Training Requirements	Go live support can be delivered remotely if required		
Note	This course should take place on the day of a cutover		

COURSE DESCRIPTION

This course offering provides live day support to all users on the system go-live.

COURSE CONTENT

Trainers will be on hand to:

- ✓ Provide support for operators to ensure confident use during a live situation

- ✓ Assist individuals unable to attend any end user classroom sessions

- ✓ Answer any questions during the day

- ✓ Troubleshoot any problems

- ✓ Ensure seamless adoption and transition of new technology

- ✓ Allow project engineers to concentrate on live day changes/updates

Microsoft 365 Administrator Essentials

Duration	4 days
Group Size	Up to 10 people maximum
Prerequisite	No prior knowledge of Microsoft 365 is necessary but a good level of IT literacy is highly recommended.
Course Type	Microsoft 365 **Course code** O365:ADES
Training Room Requirements	» Meeting Room » TV/Projector » PC/Laptop with Outlook per user
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams » Attendees must have access to a PC/ Laptop that can access Microsoft Teams
Note	This course should take place before a cutover

COURSE DESCRIPTION

This four-day instructor-led course provides students with the knowledge and skills necessary to effectively manage a Microsoft 365 environment on a day-today basis and incorporates Power User topics.

This course is intended for people responsible for managing a Microsoft 365 subscription. It is assumed that the Microsoft 365 subscription is already in place and any vanity domains added.

COURSE CONTENT

Upon successful completion, delegates will be able to:

Introduction to Microsoft 365

- ✓ What is Microsoft 365
- ✓ Using Microsoft 365 via Web Portal
- ✓ My Profile
- ✓ Install Software and Change Settings

User Management

- ✓ Creating and Managing User Accounts in Microsoft 365
- ✓ Creating and Managing User Accounts Using Active Directory Sync
- ✓ Creating and Managing User Accounts via PowerShell

Exchange Online & Outlook

- ✓ Provisioning User Mailboxes
- ✓ Global Directory Management
- ✓ Compliance management
- ✓ Mobile Device settings
- ✓ Protection and spam mail configuration
- ✓ Outlook & Microsoft 365 Mail
- ✓ Using Calendars in the Microsoft 365 world
- ✓ Integration with Teams
- ✓ Attachment or link? – sharing documents
- ✓ Tasks and Flagged Emails
- ✓ Categories
- ✓ Rules (client or web?)
- ✓ Out of Office

SharePoint Online & OneDrive

- ✓ What's the difference? - Team Sites, Communication Sites, Hub Sites, Groups, Teams
- ✓ Creating and Maintaining Site Collections
- ✓ Managing OneDrive for Business
- ✓ Managing User Profiles
- ✓ What is One Drive for Business?
- ✓ Set up your OneDrive Library on the PC
- ✓ To sync or not to sync?
- ✓ Working with files and OneDrive for Business
- ✓ Document Sharing
  - o Collaborative Editing
  - o Teams Integration

- ✓ Working with files and SharePoint
    - o Check-in and Check-Out explained
    - o Navigating a Site
    - o Working with Apps
    - o Sort & Filter
    - o Versions
    - o Approval
    - o Microsoft Office Integration
- ✓ Document Libraries
    - o Create a Document Library
    - o Modify Settings and Library Policies
    - o Create Columns
    - o Modify Views
    - o Create Views
    - o Document Content Types
    - o Approval Workflow
- ✓ Lists
    - o Modern Lists vs Classic Lists
    - o Create a List
    - o Modify Settings and List Policies
    - o Create Columns
    - o Modify Views
    - o Create Views
- ✓ Pages
    - o Create and Modify a Web Part Page
    - o Create and Modify a Wiki Page
    - o Create and Modify a Site Page
    - o Working with Pages in a Communication Site
    - o Site Assets
- ✓ Site Settings
    - o Customise Site Navigation
    - o Permissions

- ✓ Reusable Content
    - o Site Columns
    - o Site Content Types
- ✓ Creating Sites
    - o When & Where to create a Site
    - o Creating a Site
    - o Site Templates (incl Groups/Teams/HubSites)
    - o Site Themes
    - o Deleting Sites
    - o Apps & the App Marketplace

Microsoft Teams

- ✓ User Configuration
- ✓ External Communication
- ✓ Presence
- ✓ Calls, chats and meetings
- ✓ Desktop sharing
- ✓ Creating a Team
- ✓ Chat and Channels
- ✓ Files and SharePoint
- ✓ Adding Tabs
- ✓ Relationship between Teams & SharePoint

Reports

- ✓ Using the reports in the Microsoft 365 Admin Dashboard

Mobile Apps & Other Features

- ✓ Overview the other features and settings
- ✓ Mobile Apps

An Introduction to the Security & Compliance Center

- ✓ Accessing the Security & Compliance Center
- ✓ The Audit Log
- ✓ Setting Alerts

Getting Support

- ✓ Using Help
- ✓ Submitting a Support Request

NOTES: Microsoft 365 is an evergreen landscape and the course delivery will reflect the most current updates. Feature availability within individual organisations Microsoft 365 environment is dependent on the licences purchased and assigned to users.

Teams for Education- Microsoft 365 & Teams

Duration	½ day (interactive & hands on)		
Group Size	Up to 15 people maximum		
Prerequisite	No prerequisite		
Course Type	Microsoft 365	Course code	O365:TFED
Training Room Requirements	» Meeting Room » TV/Projector » PC/Laptop with Outlook per user		
Remote Training Requirements	» Sessions will be hosted using either Microsoft Teams sessions » Attendees must have access to a PC/ Laptop that can access Microsoft Teams		
Note	This course should take place before a cutover		

COURSE DESCRIPTION

With Microsoft Teams for Education, educators, faculty and teaching staff can create collaborative classrooms, connect in learning communities, and communicate with students and other educators. This course will help you understand how to use and manage Microsoft (for Education) TeamSite's specifically for your school or institution.

COURSE CONTENT

Module 1 – Introducing Microsoft 365.

Module 2 – Connect and log on to Microsoft 365

Module 3 – Navigating Microsoft 365

Module 4 – Introduction to applications in Microsoft 365

Module 5 – Teams Overview

- ✓ Posts and files
- ✓ Channels and Tabs
- ✓ Meetings

Module 6 – Teams Settings, members and permissions

Module 7 – Class OneNote notebook

Module 8 – Assignments

Module 9 – Meeting

- ✓ Features of Teams to support virtual delivery

Module 10 – Teacher – Student delivery

Module 11 – Hints & Tips

Microsoft Teams Direct Routing Administration

Duration	1 day		
Group Size	Up to 5 people maximum		
Prerequisite	Basic experience with Microsoft 365 Admin Centre		
Course Type	Microsoft 365	**Course code**	O365:TDRA:1
Training Room Requirements	» Meeting Room » Access to the in house Microsoft Administration Centre		
Remote Training Requirements	» Sessions will be hosted using either Microsoft Teams sessions » Access to the in house Microsoft Administration Centre		
Note			

COURSE DESCRIPTION

This course aims to provide delegates with an basic introduction to administering Microsoft Teams and Teams Direct Routing. It is delivered as an overview and demos style course with discussions about client specific scenarios and challenges.

COURSE CONTENT

Microsoft Teams Overview

- ✓ Overview of Microsoft Teams

- ✓ Overview of security and compliance in Microsoft Teams

- ✓ Overview of managing Microsoft Teams

Implement Microsoft Teams Governance, Security and Compliance

- ✓ Implement Governance and Lifecycle Management for Microsoft Teams

- ✓ Implementing Security for Microsoft Teams

- ✓ Implementing Compliance for Microsoft Teams

Manage communication in Microsoft Teams

- ✓ Manage Live event and meetings experiences
- ✓ Manage phone numbers
- ✓ Manage Phone System for Microsoft Teams
- ✓ Troubleshot audio, video, and client issues

Manage Microsoft Teams Direct Routing

- ✓ Powershell – Add DDI number
- ✓ Powershell – Add Voice Policy
- ✓ Powershell – Enable User
- ✓ Setting up a new user
- ✓ Resource accounts
- ✓ Call Queues
- ✓ Auto Attendant / IVR
- ✓ Holidays

Data Governance

Duration	4 days
Group Size	No limit
Prerequisite	No prerequisite- aimed at administrators and technical team
Course Type	Microsoft 365 **Course code** O365:CADG:DAG
Training Room Requirements	» Meeting Room » TV/Projector » PC/Laptop with Outlook per user
Remote Training Requirements	» Sessions will be hosted using Microsoft Teams sessions » Attendees must have access to a PC/ Laptop that can access Microsoft Teams
Note	This course should take place before the beginning of a project but can be done after if required

COURSE DESCRIPTION

Microsoft Teams has been quickly growing from a multifunctional communication platform to an essential tool for today's modern workplace.

However, managing a Microsoft Teams environment for your entire organisation is far from an easy task. To ensure that you can prevent sprawl, keep internal data safe, and make everything work as efficiently as possible for your end users, some serious control measures are required. Also called, governance. It refers to the act or method of management, the code of conduct, and the supervision of the use of the application.

COURSE CONTENT

Data Governance Service Scope:

- ✓ Kick off meeting
- ✓ Data Governance assessment workshop
- ✓ Data Governance report, and
- ✓ Transition & knowledge transfer meeting
- ✓ Rulebook Workshop

✓ Administration Training (Technical Training)

Kick-off Meeting

Fast Lane, in conjunction with and with the cooperation of Client, will work to finalize the following before the Consultant conducts the workshop:

✓ Date - Finalize the work schedule and timeline

✓ Stakeholders – who should participate?

✓ Microsoft licences – what licences being used and how many?

✓ Goals setting – what is the desired outcome?

Data Governance Assessment Workshop

✓ A data governance review – What is required and why: The consultant will review your current environment, discuss your short-term and long-term goals for Teams, Microsoft 365 and data governance and understand your data use scenarios.

✓ Microsoft 365 and Teams Data Governance – How it can be implemented: The consultant will provide knowledge transfer and best practices for the data governance and compliance controls that can be applied to each tier of Microsoft 365 to ensure that the Teams lifecycle and the data management lifecycle are securely managed to your specific objectives.

Data Governance Report

The consultant will create a bespoke report based on your specific objectives and Microsoft licencing. The report will detail best practices and configuration settings based on a crawl, walk, run implementation strategy.

The data governance recommendations for Microsoft Teams are divided into eight key areas:

✓ Team configuration – Defining the global settings for Microsoft Teams.

✓ Microsoft 365 Groups configuration - Defining the global settings for Microsoft 365 Groups which also control Teams and Yammer Groups

✓ Microsoft 365 Groups and Teams Creation – Defining who and how teams are created and what security is applied to them.

✓ Team membership – Controlling the internal users and external guest membership and ongoing reporting of adoption.

✓ Teams Lifecycle - Managing teams lifecycle to ensure that teams are reviewed on a regular basis and deleted when no longer required to prevent information sprawl.

✓ Information Management – Ensuring information protection measures are appropriately applied to team's data, chat and conversations and that external sharing is controlled.

- ✓ Client Access – Ensuring the technical set up has been deployed and appropriate levels on user and device controls are applied to ensure that user can safely and easily access Microsoft 365 and Teams.

- ✓ Microsoft 365 and team's data governance OCM & training – Ensuring that IT administrations, security staff, service desk users and end users are trained on data governance best practices and their roles and responsibilities for using, managing and supporting Microsoft 365 and teams.

Transition & Knowledge Transfer Meeting

As part of the knowledge transfer the consultant will:

- ✓ Detail the tailored data governance best practices including the recommended configuration settings in the report

- ✓ Provide conduct a Transition & Knowledge Transfer Meeting (virtually) to review the report, answer questions and finalise handover and discuss next steps.

Rulebook Workshop

As part of the rulebook workshop, the consultant will:

- ✓ Detail all the allowances and restrictions that have been put in place as a result of the previous data governance workshops

- ✓ The rulebook will define why restrictions have been put in place and what alternatives are available

- ✓ The rulebook will also detail company policies that must be adhered to

- ✓ The resulting document will feed into the training collateral that needs to be produced

Administration Training

As part of the administration training, the consultant will:

- ✓ Provide information to administer everyday changes for Microsoft 365 and Microsoft Teams based on previous data governance workshops.

- ✓ It will cover the benefits and best practices and help users understand the best ways to manage Teams and Channels.

- ✓ Administrators will discover ways to implement and roll out teams to new starters as well as manage the existing estate with little disruption.

Training in other languages

Fast Lane can provide training in other languages including but not limited to: .

- ✓ Dutch
- ✓ German
- ✓ French
- ✓ Spanish
- ✓ Italian
- ✓ Portuguese
- ✓ Chinese
- ✓ Japanese
- ✓ Arabic
- ✓ Czech
- ✓ Slovak
- ✓ Polish

Training Materials

Customized End User manuals can be created for both Quick Reference Guides (QRG) and in-depth end user guidance. PowerPoint training presentations can also be created.

Our training team will work with the client to build bespoke training collateral based on client input and their vision in mind.
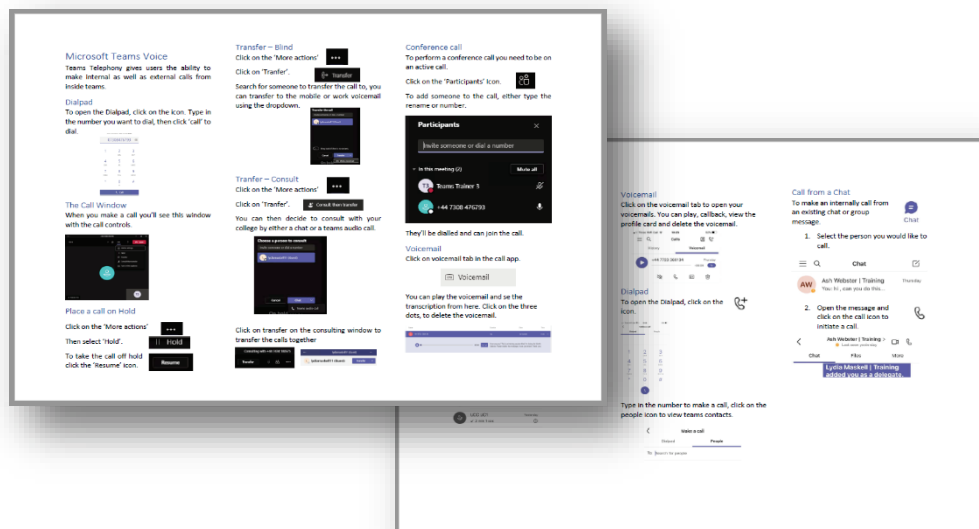

Example ORG
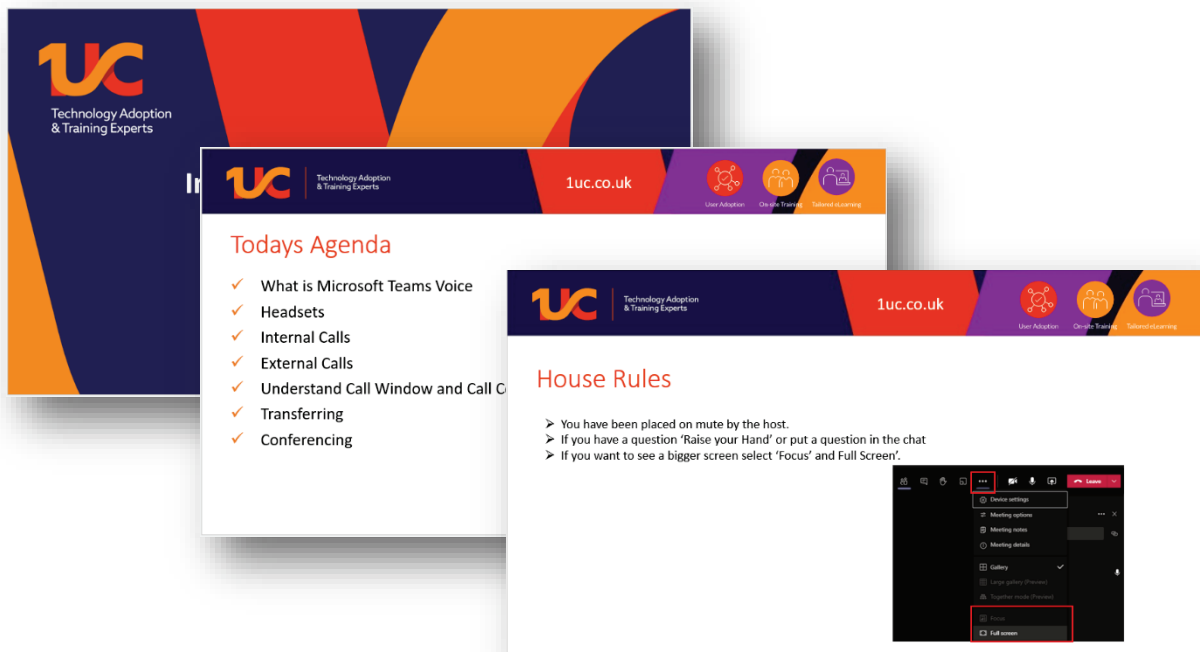
Example PowerPoint

Bespoke Training Videos

Tailored training videos can also be created to facilitate a blended learning approach. By combining online educational materials and opportunities for interaction using classroom-based learning within a remote environment, ensures the ongoing training needs are covered beyond the initial course delivery. Each video is bespoke, meaning there is consistent branding throughout, and training scenarios reflect the real-world environment specific to the client.

Training videos are concise learning assets that helps to support the intrinsic learning preference to learn by watching and helps create an environment for bite-sized and "micro-learning", this satisfies multiple learning styles and creates a more relaxing, engaging way to learn, leading to greater retention of information.
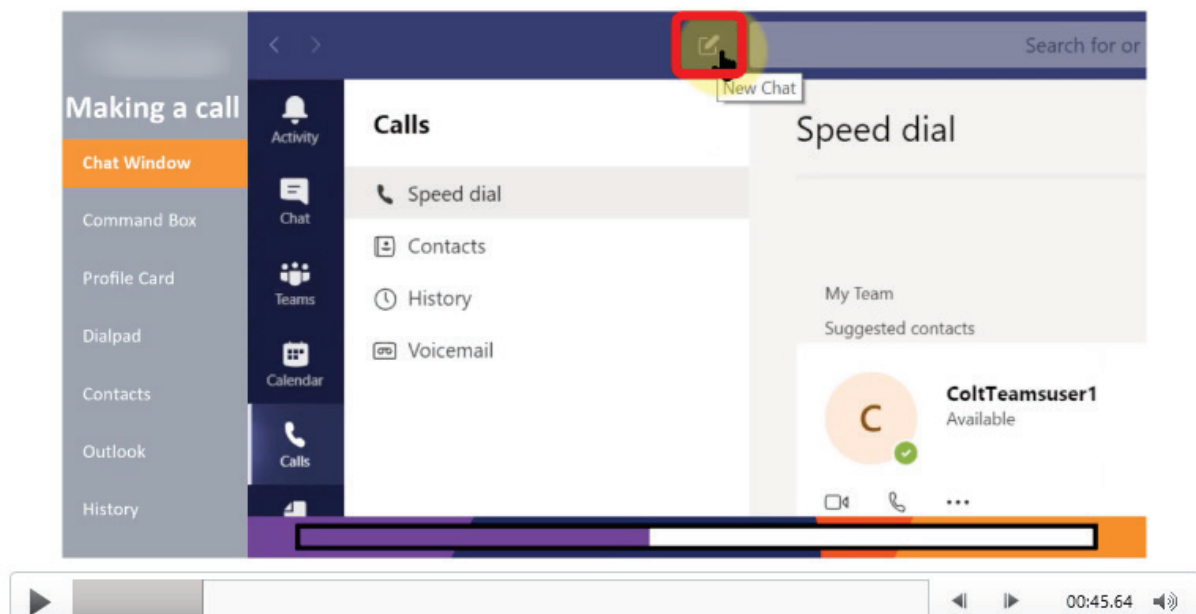
Example mp4 Video Screenshot

Interactive customized tutorials allow you to create and personalize training scenarios for the Microsoft applications and highlight benefits to the end users. Each section ranges in length from around 30 seconds to 2 minutes.

Online tutorials can be used as part of the pre-migration communication to users, as an aide-memoire after user migration and to help users navigate through the features of their new system. Additionally, it can be used for new starters as part of an induction program.

Our experienced adoption consultants have been significantly involved in creating the interactive tutorials. Their working knowledge has been transferred to create an informative and well-designed e-learning tutorial that reflects the best practice in the use of these products.

The final product is delivered as MP4 files. These can be distributed by the company as required, such as the company intranet or SharePoint.