



Microsoft Education Services Course Catalogue

April 2024

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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.



Microsoft 365 Teams Phone

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.

Duration	90 minutes
Group Size	Up to 50 people maximum
Prerequisite	No Prerequisite
Course Type	Microsoft 365
Training Room Requirements	<ul style="list-style-type: none">• Meeting Room• TV/Projector• PC/Laptop with Teams per user• 3 client test accounts must be provided
Remote Training Requirements	<ul style="list-style-type: none">• 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 Code	O365:TEVO

Course Content

Upon successful completion, delegates will be able to understand:

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

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

Call Delegation and Shared Lines (if applicable)

- 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

Call Queues (if applicable)

- Logging in and out
- Call Queues in a Channel
- Answering a call from the queue
- Making a call from the queue

Microsoft 365 Teams Phone – Mobile

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.

Duration	90 minutes
Group Size	Up to 50 people maximum
Prerequisite	No Prerequisite
Course Type	Microsoft 365
Training Room Requirements	<ul style="list-style-type: none">• Meeting Room• TV/Projector• PC/Laptop with Teams per user• 3 client test accounts must be provided
Remote Training Requirements	<ul style="list-style-type: none">• 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 Code	O365:TEVO:M

Course Content

Upon successful completion, delegates will be able to understand:

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

Microsoft Teams Phone Administration

This course aims to provide delegates with an introduction to administering Microsoft Teams Phone. 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.

(This course is applicable for customers using Operator Connect and Direct Routing).

Duration	1/2 Day
Group Size	Up to 5 people maximum
Prerequisite	Basic experience with Microsoft 365 Admin Centre
Course Type	Administration
Training Room Requirements	<ul style="list-style-type: none">• Meeting Room• Access to the in-house Microsoft Administration Centre
Remote Training Requirements	<ul style="list-style-type: none">• Access to the in-house Microsoft Administration Centre
Note	
Course Code	O365:TEVO:A

Course Content

Upon successful completion, delegates will be able to understand:

Microsoft Teams Overview

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

Managing users

- Creating a new user
- Licensing a user
- Assigning a user a phone/number
- Setting User policies

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

Microsoft 365 Teams – Collaborating in Teams

Microsoft Teams is a combination of multiple different software programs. This course will demonstrate how to use the basic features of collaborating in Teams.

Duration	90 minutes
Group Size	Up to 25 people maximum
Prerequisite	No Prerequisite
Course Type	Microsoft 365
Training Room Requirements	<ul style="list-style-type: none">• Meeting Room• TV/Projector• PC/Laptop with Teams per user
Remote Training Requirements	<ul style="list-style-type: none">• 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 Code	O365:TECO:COLT

Course Content

Upon successful completion, delegates will be able to understand:

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

This course will demonstrate how to use the basic features of Teams chats and other communication methods within Teams.

Duration	90 minutes
Group Size	Up to 25 people maximum
Prerequisite	No Prerequisite
Course Type	Microsoft 365
Training Room Requirements	<ul style="list-style-type: none">• Meeting Room• TV/Projector• PC/Laptop with Teams per user
Remote Training Requirements	<ul style="list-style-type: none">• 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 Code	O365:TECO:COMT

Course Content

Upon successful completion, delegates will be able to understand:

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 meetings

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

Duration	90 minutes
Group Size	Up to 25 people maximum
Prerequisite	No Prerequisite
Course Type	Microsoft 365
Training Room Requirements	<ul style="list-style-type: none">• Meeting Room• TV/Projector• PC/Laptop with Teams per user
Remote Training Requirements	<ul style="list-style-type: none">• 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 Code	O365:TECO:TM

Course Content

Upon successful completion, delegates will be able to understand:

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 Owners (Managing a Microsoft Team)

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.

Duration	90 minutes
Group Size	Up to 25 people maximum
Prerequisite	No Prerequisite
Course Type	Microsoft 365
Training Room Requirements	<ul style="list-style-type: none">• Meeting Room• TV/Projector• PC/Laptop with Teams per user
Remote Training Requirements	<ul style="list-style-type: none">• 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 Code	O365:TAOW

Course Content

Upon successful completion, delegates will be able to understand:

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

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

Duration	½ day
Group Size	Up to 10 people maximum
Prerequisite	No Prerequisite
Course Type	Microsoft 365
Training Room Requirements	<ul style="list-style-type: none">• PC/Laptop with Teams per user
Remote Training Requirements	<ul style="list-style-type: none">• 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 Code	O365:TECO:S

Course Content

Upon successful completion, delegates will be able to understand:

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
- 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

Teams Meeting Rooms

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:

- Secretaries/PA's/EA's
- Front of house / Receptionists
- Team Co-ordinators
- Champions

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

Duration	90 minutes
Group Size	Up to 10 people maximum
Prerequisite	No Prerequisite
Course Type	Microsoft 365
Training Room Requirements	<ul style="list-style-type: none">• Access to Teams Meeting Room Equipment• Client Laptop with Teams installed
Remote Training Requirements	<ul style="list-style-type: none">• This course should take place after equipment is installed and tested.• Training can only be delivered onsite
Note	<ul style="list-style-type: none">• This course should take place after equipment is installed and tested.• Training can only be delivered onsite
Course Code	O365:TEMR

Course Content

Upon successful completion, delegates will be able to understand:

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

Microsoft 365 – Introduction to OneDrive & SharePoint

This course aims to provide a comprehensive introduction to Microsoft SharePoint and OneDrive, two powerful collaboration and document management tools used widely in the business environment. Participants will gain a solid understanding of the key features, functionalities, and best practices for leveraging SharePoint and OneDrive to enhance productivity and streamline document management processes.

Duration	90 minutes
Group Size	Up to 25 people maximum
Prerequisite	No Prerequisite
Course Type	Microsoft 365
Training Room Requirements	<ul style="list-style-type: none">• Meeting Room• TV/Projector• PC/Laptop with Drive per user
Remote Training Requirements	<ul style="list-style-type: none">• 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 Code	O365:IODS

Course Content

Upon successful completion, delegates will be able to understand:

Introduction to SharePoint and OneDrive

- Overview of SharePoint and OneDrive
- Understanding the benefits of SharePoint and OneDrive
- Exploring the SharePoint and OneDrive interface
- Navigating and accessing SharePoint sites and libraries
- Configuring OneDrive for personal document management

Document Management in SharePoint and OneDrive

- Creating and uploading documents and folders
- Organizing and managing documents and folders
- Utilizing metadata and properties for efficient

document management

- Searching and filtering documents in SharePoint and OneDrive
- Offline access and synchronization with OneDrive

Collaboration and Sharing in SharePoint

- Collaborating on documents with team members
- Creating and managing document workflows and approvals
- Utilizing co-authoring and real-time document collaboration
- Sharing documents internally and externally
- Implementing version control and document version history

Customization and Security in SharePoint

- Customizing SharePoint sites and libraries
- Creating and managing SharePoint lists and libraries
- Applying permissions and security settings
- Implementing user groups and permission levels
- Configuring access control and permissions inheritance

Advanced Features and Integration

- Integrating OneDrive with Microsoft Office applications
- Using SharePoint search and content management features
- Creating and managing custom web parts and dashboards
- Implementing mobile access and remote document management
- Exploring advanced collaboration features in SharePoint
- Restoring previous versions
- Manage Access and permissions

Microsoft 365 SharePoint End User

This course is specifically designed for individuals who will be utilizing SharePoint sites within their organisation. This course provides an in-depth understanding of how to navigate, interact, and collaborate effectively within SharePoint sites. Participants will gain practical knowledge on accessing and contributing to site content by utilising key features to enhance productivity and collaboration within SharePoint.

Duration	½ day
Group Size	Up to 10 people maximum
Prerequisite	<ul style="list-style-type: none">• 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
Training Room Requirements	<ul style="list-style-type: none">• Meeting Room• TV/Projector• PC/Laptop with Windows 10
Remote Training Requirements	<ul style="list-style-type: none">• 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 Code	O365:SHPO

Course Content

Upon successful completion, delegates will be able to understand:

Introduction to SharePoint

- Overview of SharePoint and its role within the organisation
- Understanding the benefits of using SharePoint for collaboration and information sharing
- Navigating the SharePoint site interface
- Exploring the different types of content within a SharePoint site

Site Navigation and Content Access

- Understanding site architecture and layout
- Navigating and searching for content within SharePoint sites

- Using metadata and filters to locate specific information
- Exploring document libraries, lists, and other content repositories

Contributing and Collaborating with Content

- Uploading, creating, and editing documents within SharePoint
- Collaborating on documents using co-authoring and version control
- Commenting, tagging, and rating content
- Notifying and alerting team members about content changes

Personalization and Profile Management

- Setting up and managing user profiles
- Customizing My Sites and personalizing the SharePoint experience
- Adding and managing social tags, interests, and activities
- Utilizing personalization features to enhance productivity

Team Collaboration and Communication

- Participating in discussions and forums
- Creating and managing team sites and project spaces
- Utilizing calendars, tasks, and shared resources for team collaboration
- Integrating and utilizing SharePoint communication features (blogs, surveys, announcements)

Microsoft 365 SharePoint Site Owner

This course is designed for individuals who are responsible for managing and maintaining SharePoint sites within their organization. This comprehensive course provides site owners with the knowledge and skills necessary to create, customize, and manage SharePoint sites effectively. Participants will gain a deep understanding of SharePoint site architecture, permissions, content management, and collaboration features.

Duration	1 Day
Group Size	Up to 10 people maximum
Prerequisite	<ul style="list-style-type: none">• A basic understanding of Windows 7 or higher.• Experience using Microsoft Edge 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
Training Room Requirements	<ul style="list-style-type: none">• Meeting Room• TV/Projector• PC/Laptop with Windows 10
Remote Training Requirements	<ul style="list-style-type: none">• Sessions will be hosted using Microsoft Teams• Attendees must have access to a PC/ Laptop that can access Microsoft Teams & SharePoint
Note	This course should take place before a cutover
Course Code	O365:SPSO

Course Content

Upon successful completion, delegates will be able to understand:

Introduction to SharePoint Sites

- Overview of SharePoint and its key features
- Understanding different types of SharePoint sites
- Navigating the SharePoint site interface
- Exploring site templates and site collections

Site Creation and Customization

- Site Architecture
- Creating Hub Site, connecting to a Hub Site
- Creating new SharePoint sites
- Customizing site layout and appearance
- Adding and modifying site navigation
- Configuring site permissions and access levels

Content Management

- Uploading and organizing documents and files
- Creating and Managing SharePoint lists and libraries
- Implementing version control and document approval workflows
- Utilizing metadata and content types

Collaboration and Communication Features

- Implementing collaboration features: task lists, progress tracking, and calendars
- Setting up and managing document co-authoring
- Leveraging SharePoint social features and profiles

Permissions and Security

- Managing SharePoint site permissions and access levels
- Implementing security best practices
- Understanding user authentication and authorization
- Configuring site-level and item-level permissions

Microsoft 365 SharePoint Administration

This course is designed to equip you with the skills and knowledge needed to effectively manage and administer SharePoint environments. Whether you're new to SharePoint administration or seeking to enhance your existing skills, this course will provide you with a solid foundation in SharePoint administration best practices, configuration, and maintenance.

Duration	1 Day
Group Size	Up to 5 people maximum
Prerequisite	<ul style="list-style-type: none">• 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
Training Room Requirements	<ul style="list-style-type: none">• Meeting Room• TV/Projector• PC/Laptop with Windows 10
Remote Training Requirements	<ul style="list-style-type: none">• 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 Code	O365:SPAD

Course Content

Upon successful completion, delegates will be able to understand:

Introduction to SharePoint Administration

- Overview of SharePoint and its importance in organizational collaboration
- Understanding the role of a SharePoint Administrator
- Overview of SharePoint administration dashboard, tools and environments

Planning and Architecture

- Assessing business requirements for SharePoint deployment
- SharePoint farm architecture and topology
- Planning high availability and disaster recovery strategies

Installation and Configuration

- Installing and configuring SharePoint Server
- Configuring service applications and web applications
- Managing SharePoint features and solutions

Site Collection Administration

- Creating and managing site collections
- Configuring site collection features and settings
- Managing site users and permissions

List and Library Management

- Creating and managing lists and libraries
- Configuring list and library settings and permissions
- Implementing content types and metadata

Search and Content Management

- Configuring search settings and crawling
- Utilizing search features for content discovery
- Implementing content management features like records management and document routing

Workflow and Business Process Automation

- Configuring and managing workflows in SharePoint
- Integrating with Microsoft Power Automate for process automation
- Implementing approval processes and business process automation

Site Customization and Branding

- Customizing site themes, layouts, and branding
- Implementing master pages, page layouts, and site

Microsoft 365 OneNote

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.

Duration	90 minutes
Group Size	Up to 10 people maximum
Prerequisite	No Prerequisite
Course Type	Microsoft 365
Training Room Requirements	<ul style="list-style-type: none">• Meeting Room• TV/Projector• PC/Laptop with OneNote per user
Remote Training Requirements	<ul style="list-style-type: none">• 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 Code	O365:ONNO

Course Content

Upon successful completion, delegates will be able to understand:

OneNote Basics

- Accessing OneNote
- Create a Notebook
- Notebook structure
- Organising your Notebook
 - Add Sections
 - Add Pages
 - Move Sections
 - Move Pages
 - Quick Notes
- Notebook Ribbon
- Home Tab
- Tags
 - To Do tags and Outlook Tasks
 - Search Notebooks
- Insert tab
 - Meeting details
 - Add Text and Tables
 - Add Pictures/Screen Clippings
 - Add Links
 - File Printout Vs File Attachment
 - Images, Media & Recordings
 - 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

Microsoft 365 Introduction

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.

Duration	90 minutes
Group Size	Up to 10 people maximum
Prerequisite	<ul style="list-style-type: none">• A basic understanding of Office 2013 and Outlook• A basic knowledge of Office applications (Word, Excel, Outlook).
Course Type	Microsoft 365
Training Room Requirements	<ul style="list-style-type: none">• Meeting Room• TV/Projector• PC/Laptop with Delve per user
Remote Training Requirements	<ul style="list-style-type: none">• 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 Code	O365:INTRO

Course Content

Upon successful completion, delegates will be able to understand:

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

Planning

- Personal Planning
- Project Planning
- Notes

Microsoft Files

- Microsoft file storage types
- SharePoint vs OneDrive
- Creating SharePoint Sites
- Sharing from OneDrive vs SharePoint

Outlook on the Web

- Email
- Calendar
- Tasks

Excel Core Essentials

This course will provide users with an overview and introduction of the core elements of Microsoft Excel. This will enable them to discover and become more comfortable with the operating system.

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

Duration	1/2 Day
Group Size	Up to 10 people maximum
Prerequisite	No Prerequisite
Course Type	Microsoft 365
Training Room Requirements	<ul style="list-style-type: none">• Meeting Room• TV/Projector• PC/Laptop with Windows 10
Remote Training Requirements	<ul style="list-style-type: none">• 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 Code	O365:EXCE:C

Course Content

Upon successful completion, delegates will be able to understand:

Introduction to Excel

- Overview of Excel interface and workspace
- Navigating and customizing the ribbon and toolbar
- Creating and managing workbooks and worksheets
- Entering, editing, and deleting data
- Formatting cells and data

Formulas and Functions

- Understanding basic mathematical operators
- Using built-in functions for calculations
- Creating custom formulas and using cell references
- Utilizing functions for statistical analysis
- Using formulas across different worksheets

Data Manipulation and Analysis

- Sorting and filtering data
- Applying conditional formatting
- Working with large datasets efficiently
- Using data validation to maintain data accuracy
- Understanding and applying data protection techniques

Charts and Graphs

- Creating different types of charts and graphs
- Formatting and enhancing charts
- Adding titles, labels, and legends to charts
- Creating combination charts
- Linking charts to data tables

Sharing and Collaboration

- Protecting and sharing workbooks
- Collaborating on workbooks with multiple users
- Tracking and reviewing changes
- Using comments and annotations
- Integrating Excel with other Microsoft Office applications

Excel Tips and Tricks

- Time-saving keyboard shortcuts
- Advanced data manipulation techniques
- Creating dynamic range names
- Linking and consolidating data from multiple sources
- Tips for improving spreadsheet performance

Excel Intermediate

This course will provide additional knowledge around Microsoft Excel, building on the knowledge gained from the core essentials course. This course will include more advanced features in formulas and functions and enhancing the way data is displayed.

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

Duration	1/2 Day
Group Size	Up to 10 people maximum
Prerequisite	No Prerequisite
Course Type	Microsoft 365
Training Room Requirements	<ul style="list-style-type: none">• Meeting Room• TV/Projector• PC/Laptop with Windows 10
Remote Training Requirements	<ul style="list-style-type: none">• 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 Code	O365:EXCE:I

Course Content

Upon successful completion, delegates will be able to understand:

Advanced Formulas and Functions

- Understanding and using logical functions (IF, AND, OR).
- Working with date and time functions.
- Applying mathematical and statistical functions.
- Using text functions for data manipulation.
- Introduction to array formulas.

Conditional Formatting

- Applying conditional formatting based on specific criteria.
- Working with data bars, color scales, and icon sets.
- Creating custom conditional formatting rules.
- Using conditional formatting as a visual analysis tool.

Managing Large Datasets

- Sorting and filtering data to manage large datasets.
- Applying advanced sorting techniques.
- Using advanced filter options and criteria.
- Removing duplicates from datasets.
- Tips for efficient data management.

Advanced Data Analysis

- Understanding and creating PivotTables.
- Manipulating and summarizing PivotTable data.
- Using slicers and timelines for interactive data analysis.
- Introduction to Power Query for data transformation and cleaning.

Automating Tasks with Macros

- Recording and running macros.
- Editing and enhancing recorded macros.
- Intermediate VBA programming concepts.
- Assigning macros to buttons and shortcuts.

Advanced Charting and Visualizations

- Utilizing advanced chart types (scatter plots, histograms, etc.).
- Enhancing charts with formatting options.
- Creating combination charts with multiple data sets.
- Using sparklines and data bars for visual analysis.
- Customizing chart elements and labels.

Advanced Tips and Tricks

- Working with functions to solve complex problems.
- Using lookup functions for data retrieval.
- Tips for efficient data validation.
- Advanced data manipulation techniques.
- Troubleshooting errors and formulas.

Word Essentials

This course will familiarise users with some of the main features Microsoft Word has to offer and enable them to discover and become more comfortable with the software application.

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

Duration	90 minutes
Group Size	Up to 10 people maximum
Prerequisite	No Prerequisite
Course Type	Microsoft 365
Training Room Requirements	<ul style="list-style-type: none">• Meeting Room• TV/Projector• PC/Laptop with Windows 10
Remote Training Requirements	<ul style="list-style-type: none">• 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 Code	O365:WORD

Course Content

Upon successful completion, delegates will be able to understand:

Introduction to Microsoft Word

- Overview of Word's interface and key components
- Navigating Word's ribbon and menus
- Creating, saving, and opening documents

Formatting Documents

- Formatting text: font styles, sizes, and effects
- Paragraph formatting: alignment, indentation, and spacing
- Applying themes and styles for consistent document design

Document Layout and Page Setup

- Working with margins, page orientation, and paper size
- Headers and footers: adding page numbers, dates, and document information
- Using sections and breaks for complex document layouts

Working with Document Content

- Adding and editing text in Word documents
- Inserting tables, pictures, and shapes
- Creating and formatting lists, including numbered and bulleted lists

Styles and Templates

- Working with built-in and custom document styles
- Creating and modifying templates for consistent document formatting
- Utilizing the Quick Styles gallery for efficient formatting

Collaboration and Reviewing

- Enabling track changes and making comments for collaborative editing
- Comparing and merging documents
- Protecting documents with passwords and permissions

Advanced Formatting Techniques

- Working with advanced text formatting, such as drop caps and text columns
- Adding and formatting hyperlinks, bookmarks, and cross-references
- Inserting and formatting tables of contents and indexes

PowerPoint Essentials

This course will familiarise users with some of the main features Microsoft PowerPoint has to offer and enable them to discover and become more comfortable with the software application.

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

Duration	90 minutes
Group Size	Up to 10 people maximum
Prerequisite	No Prerequisite
Course Type	Microsoft 365
Training Room Requirements	<ul style="list-style-type: none">• Meeting Room• TV/Projector• PC/Laptop with Windows 10
Remote Training Requirements	<ul style="list-style-type: none">• 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 Code	O365:POPO

Course Content

Upon successful completion, delegates will be able to understand:

Introduction to Microsoft PowerPoint

- Overview of PowerPoint’s interface and key components
- Navigating PowerPoint’s ribbon and menus
- Creating, saving, and opening presentations

Slide Design and Layout

- Choosing and customizing slide layouts
- Applying themes and color schemes
- Working with master slides for consistent design

Adding and Formatting Content

- Adding and editing text content in slides
- Inserting and formatting images, shapes, and icons
- Utilizing SmartArt graphics for visual representation

Working with Multimedia

- Inserting and embedding audio and video files
- Editing multimedia content within PowerPoint
- Configuring multimedia playback options

Animation and Transitions

- Applying slide transitions for smooth visual effects
- Using animation effects to bring slides to life
- Customizing animation timings and triggers

Slide Show Delivery and Presenting

- Preparing and rehearsing slide shows
- Using presenter view for an enhanced presenting experience
- Customizing slide show settings for a seamless delivery

Collaborating and Sharing

- Enabling collaboration features for co-authoring presentations
- Sharing presentations via email, OneDrive, and SharePoint
- Utilizing comments and feedback for collaboration

Data Visualization with Charts and Tables

- Creating and formatting charts to display data
- Designing and customizing tables for information organization
- Linking charts and tables to external data sources

Tips and Tricks for Effective Presentations

- Design best practices for creating visually appealing slides
 - Effective use of fonts, colors, and images
 - Presenting tips for engaging and impactful presentations
- Permissions and Security

Microsoft 365 Forms

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.

Duration	90 minutes
Group Size	Up to 10 people maximum
Prerequisite	No Prerequisite
Course Type	Microsoft 365
Training Room Requirements	<ul style="list-style-type: none">• Meeting Room• TV/Projector• PC/Laptop with Forms per user
Remote Training Requirements	<ul style="list-style-type: none">• 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 Code	O365:FORM

Course Content

Upon successful completion, delegates will be able to understand:

Introduction to Microsoft Forms

- Overview of Microsoft Forms and its benefits
- Exploring the user interface and basic functionalities
- Creating and customizing forms, surveys, quizzes, and polls

Distributing and Collecting Responses

- Sharing forms with participants using different methods (email, link, QR code)
- Managing response collection settings and deadlines
- Monitoring response progress and reminders

Analyzing and Reporting

- Analyzing survey data using built-in reporting tools
- Generating visual reports and summaries
- Exporting data to Excel for further analysis

Advanced Features and Integrations

- Utilizing advanced form features, such as branching and question logic
- Integrating Microsoft Forms with other Office applications (Excel, PowerPoint, Teams)
- Exploring best practices for survey design and data collection

Outlook for Microsoft 365 – Basic

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.

Duration	90 minutes
Group Size	Up to 10 people maximum
Prerequisite	No Prerequisite
Course Type	Microsoft 365
Training Room Requirements	<ul style="list-style-type: none">• Meeting Room• TV/Projector• PC/Laptop with Outlook per user
Remote Training Requirements	<ul style="list-style-type: none">• 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 Code	O365:OULO:B

Course Content

Upon successful completion, delegates will be able to understand:

Getting Started with Microsoft Outlook

- Introduction to Microsoft Outlook interface and navigation
- Creating and managing email accounts
- Composing, sending, replying, and forwarding emails
- Organizing emails using folders and filters

Managing Email Communications

- Organizing and categorizing emails with tags and flags
- Creating and managing folders and subfolders
- Using search and filter options to find specific emails
- Managing email attachments
- Setting up automatic email signatures and vacation replies

Calendar and Appointment Management

- Navigating the Outlook calendar
- Creating, editing, and deleting appointments
- Scheduling meetings and inviting participants
- Tracking responses and managing meeting requests
- Setting reminders and managing recurring appointments

Task and Contact Management

- Creating and managing tasks and to-do lists
- Setting task priorities and deadlines
- Assigning tasks to others and tracking progress
- Managing and organizing contacts
- Using categories and distribution lists

Outlook for Microsoft 365 – Advanced

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.

Duration	90 minutes
Group Size	Up to 10 people maximum
Prerequisite	Outlook 2016 Basic
Course Type	Microsoft 365
Training Room Requirements	<ul style="list-style-type: none">• Meeting Room• TV/Projector• PC/Laptop with Outlook per user
Remote Training Requirements	<ul style="list-style-type: none">• 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 Code	O365:OULO:A

Course Content

Upon successful completion, delegates will be able to understand:

Advanced Email Management

- Advanced email filtering and rules
- Creating and using email templates
- Managing junk email and spam filters
- Customizing email views and layouts
- Configuring email notifications and alerts

Calendar Collaboration and Customization

- Sharing and delegating calendars
- Using calendar groups and overlays
- Customizing calendar views and layouts
- Utilizing color categories and conditional formatting
- Setting up and managing resource reservations

Advanced Task Management

- Creating and managing task assignments
- Using task request and tracking options
- Organizing tasks with categories and flags
- Creating task status reports and summaries
- Linking tasks to emails, contacts, and calendar events

Advanced Contact Management

- Customizing contact views and fields
- Creating distribution lists and contact groups
- Importing and exporting contacts
- Using advanced contact search techniques
- Linking and syncing contacts with other applications

Customizing Outlook for Productivity

- Configuring Outlook settings for optimal performance
- Customizing the Ribbon and Quick Access Toolbar
- Creating and managing Outlook data files
- Utilizing advanced search and filtering options
- Exploring add-ins and extensions for Outlook productivity

Microsoft 365 Outlook – Web

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

Duration	90 minutes
Group Size	Up to 10 people maximum
Prerequisite	Outlook 365 - Basic
Course Type	Microsoft 365
Training Room Requirements	<ul style="list-style-type: none">• Meeting Room• TV/Projector• PC/Laptop with Outlook per user
Remote Training Requirements	<ul style="list-style-type: none">• 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 Code	O365:OULO:W

Course Content

Upon successful completion, delegates will be able to understand:

Introduction to Outlook Web

- Overview of Outlook Web and its features
- Navigating the Outlook Web interface
- Configuring Outlook Web settings and preferences

Email Management

- Composing, replying to, and forwarding emails
- Organizing emails using folders, categories, and tags
- Utilizing the search functionality for efficient email retrieval
- Managing spam and junk emails

Calendar Management

- Creating and managing appointments and events
- Scheduling meetings and inviting participants
- Using the shared calendar feature for team collaboration
- Setting reminders and managing event notifications

Contact Management

- Adding, editing, and deleting contacts
- Organizing contacts into groups and categories
- Utilizing the address book and contact search features

Advanced Features and Collaboration

- Creating and managing rules to automate email actions
- Applying filters and advanced search techniques
- Collaborating with others using shared calendars and scheduling assistant
- Using Outlook Web in conjunction with other Microsoft Office applications

Tasks and Productivity

- Creating and managing tasks and to-do lists
- Assigning tasks to colleagues and tracking progress
- Utilizing task reminders and reminders for increased productivity

Microsoft 365 Viva Engage

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

Duration	90 minutes
Group Size	Up to 10 people maximum
Prerequisite	No Prerequisite
Course Type	Microsoft 365
Training Room Requirements	<ul style="list-style-type: none">• Meeting Room• TV/Projector• PC/Laptop with Yammer per user
Remote Training Requirements	<ul style="list-style-type: none">• 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 Code	O365:YAMM

Course Content

Upon successful completion, delegates will be able to understand:

Introduction to Viva engage

- Overview of Viva engage as an enterprise social networking platform
- Understanding the benefits and use cases of Viva engage
- Exploring the interface and key features of Viva engage

Setting Up and Configuring Viva engage

- Creating a Viva engage network for your organization
- Configuring network settings and security options
- Integrating Viva engage with other Microsoft tools and applications

Navigating Viva engage Communities

- Understanding the structure of Viva engage communities
- Creating and managing communities
- Joining and participating in existing communities

Engaging and Collaborating in Viva engage

- Posting and sharing updates, questions, and ideas
- Engaging in discussions and conversations
- Tagging and mentioning colleagues in conversations

Discovering and Following Content

- Searching for relevant conversations and content
- Using hashtags and topics to organize and discover information
- Following relevant groups and individuals

Sharing and Collaborating on Files

- Uploading and sharing files in Viva engage communities
- Collaborating on documents through Viva engage
- Utilizing version control and document co-authoring features

Viva engage Groups and Roles

- Understanding the role of groups in Viva engage
- Creating and managing groups based on project or department
- Defining group settings and roles for effective collaboration

Viva engage Features for Community Management

- Moderating and managing Viva engage communities
- Configuring community settings and notifications
- Enforcing community guidelines and policies

Viva engage Analytics and Insights

- Utilizing Viva engage's analytics and reporting features
- Monitoring community engagement and participation
- Extracting valuable insights from Viva engage data

Microsoft 365 Power Bi Basic Custom Reports

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.

Duration	2 days
Group Size	Up to 5 people maximum
Prerequisite	<ul style="list-style-type: none">• Power BI Desktop• Power Bi Pro License
Course Type	Microsoft 365
Training Room Requirements	<ul style="list-style-type: none">• Meeting Room• TV/Projector• PC/Laptop with Power BI per user
Remote Training Requirements	<ul style="list-style-type: none">• 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 Code	O365:POBI:B

Course Content

Upon successful completion, delegates will be able to understand:

Introduction to Power BI Custom Reports

- Overview of Power BI and its custom report capabilities
- Understanding the benefits and use cases of custom reports
- Introduction to Power BI Desktop and the Power BI service

Data Acquisition and Transformation

- Connecting to various data sources in Power BI Desktop
- Transforming and shaping data using Power Query Editor
- Enhancing data sources with calculated columns and measures

Visualizations and Report Layout

- Creating and formatting visualizations in Power BI Desktop
- Designing and organizing report pages for effective communication
- Utilizing interactive features like drill-through and bookmarks

Publishing and Sharing Custom Reports

- Publishing custom reports to the Power BI service
- Sharing reports with colleagues and stakeholders
- Collaborating and managing permissions for shared reports

Power Automate – Reports Scheduler

Power Automate is a very simple drag-and-drop workflow-based automation software created by Microsoft to automate manual and repetitive tasks. It is designed to allow coders and non-coders to automate repetitive tasks following a sequential rule-based flow. This course gives the participant the ability to use the tool in different scenarios to learn the breadth of what can be accomplished with Power Automate.

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

Duration	1 day
Group Size	Up to 5 people maximum
Prerequisite	<ul style="list-style-type: none">• Must have completed Power Bi Basic Custom Reports course• Power BI Desktop• Power Bi Pro License
Course Type	Microsoft 365
Training Room Requirements	<ul style="list-style-type: none">• Meeting Room• TV/Projector
Remote Training Requirements	<ul style="list-style-type: none">• 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 Code	O365:PARS

Course Content

Upon successful completion, delegates will be able to understand:

Introduction to Power Automate Reports Scheduler

- Overview of Power Automate and its capabilities
- Introduction to the Reports Scheduler feature
- Understanding the benefits of automating report generation and distribution

Getting Started with Power Automate Reports Scheduler

- Setting up Power Automate Reports Scheduler
- Configuring data sources and report templates
- Creating connections to data sources

Scheduling Reports

- Creating scheduled jobs
- Configuring triggers and recurring schedules
- Applying filters and parameters for customized reports

Automating Report Generation

- Designing workflows for report generation
- Defining data retrieval and transformation steps
- Incorporating data visualization and formatting options

Automating Report Delivery

- Configuring delivery methods (e.g., email, SharePoint, Teams)
- Defining recipient lists and permissions
- Customizing report delivery settings

Advanced Features and Troubleshooting

- Exploring advanced features of Power Automate Reports Scheduler
- Troubleshooting common issues
- Monitoring and managing scheduled jobs

Best Practices and Use Cases

- Applying best practices for efficient report scheduling
- Understanding use cases and scenarios for Power Automate Reports Scheduler
- Real-life examples and case studies

Integration with Other Tools and Applications

- Exploring integration possibilities with other Microsoft 365 applications
- Extending report delivery options with third-party tools and services

Security and Governance Considerations

- Ensuring data security and compliance
- Defining access permissions and user roles
- Implementing governance frameworks for report scheduling

Microsoft 365 Power Bi Advanced Custom Reports

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.

Duration	1 day
Group Size	Up to 5 people maximum
Prerequisite	<ul style="list-style-type: none">• Must have completed Power Bi Basic Custom Reports course• Power BI Desktop• Power Bi Pro License
Course Type	Microsoft 365
Training Room Requirements	<ul style="list-style-type: none">• Meeting Room• TV/Projector• PC/Laptop with Power BI per user
Remote Training Requirements	<ul style="list-style-type: none">• 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 Code	O365:POBI:A

Course Content

Upon successful completion, delegates will be able to understand:

Advanced Data Modeling and DAX

- Data modeling techniques for complex custom reports
- Implementing advanced calculations and calculations groups with DAX
- Utilizing hierarchies and relationships for improved analysis

Advanced Visualizations and Interactivity

- Exploring advanced visualizations and custom visuals in Power BI
- Enhancing report interactivity with slicers, filters, and drill-through actions
- Incorporating advanced features like custom tooltips and conditional formatting

Power BI Data Refresh and Scheduled Refresh

- Configuring data refresh options for custom reports
- Scheduling automatic data refreshes from various data sources
- Monitoring and troubleshooting data refresh issues

Advanced Sharing and Collaboration

- Utilizing advanced sharing capabilities with Power BI workspaces, apps, and content packs
- Collaborating on shared reports with colleagues using comments, annotations, and data-driven alerts
- Creating and managing subscriptions for automated report delivery

Microsoft 365 Visio

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.

Duration	½ day
Group Size	Up to 5 people maximum
Prerequisite	No Prerequisite
Course Type	Microsoft 365
Training Room Requirements	<ul style="list-style-type: none">• Meeting Room• TV/Projector• PC/Laptop with Flow per user
Remote Training Requirements	<ul style="list-style-type: none">• 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 Code	O365:VISI

Course Content

Upon successful completion, delegates will be able to understand:

Introduction to Microsoft Visio

- Overview of Visio and its capabilities
- Exploring the Visio interface and navigation
- Understanding different types of diagrams in Visio
- Creating and manipulating shapes and connectors
- Customizing Visio settings and preferences

Advanced Diagram Creation and Collaboration

- Using Visio templates and stencils for quick diagram creation
- Creating flowcharts, process diagrams, and organizational charts
- Incorporating data and linking external data sources into Visio diagrams
- Enhancing diagrams with themes, backgrounds, and formatting options
- Collaborating and sharing Visio diagrams with team members

Customization and Automation in Visio

- Creating custom shapes, templates, and stencils
- Implementing shape data and data graphics for advanced analysis
- Automating processes using shape data and data-driven diagrams
- Using layers, containers, and callouts for enhanced organization
- Customizing Visio settings and preferences

Integration with Microsoft Office and Beyond

- Integrate Visio diagrams with other Microsoft Office applications
- Linking diagrams to Excel data for dynamic updates
- Importing and exporting diagrams in various formats
- Sharing and presenting Visio diagrams to non-Visio users

Microsoft 365 Project – Introduction

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.

Duration	1 day
Group Size	Up to 5 people maximum
Prerequisite	No Prerequisite
Course Type	Microsoft 365
Training Room Requirements	<ul style="list-style-type: none">• Meeting Room• TV/Projector• PC/Laptop with Flow per user
Remote Training Requirements	<ul style="list-style-type: none">• 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 Code	O365:PROJ

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.

Introduction to Microsoft 365 Project Management

- Overview of project management principles and methodologies
- Introduction to Microsoft 365 Project and its capabilities
- Understanding the benefits of using Microsoft 365 Project for project management

Getting Started with Microsoft 365 Project

- Navigating the Microsoft 365 Project interface
- Creating and configuring a new project plan
- Defining project properties, timelines, and milestones

Task Management in Microsoft 365 Project

- Creating and organizing tasks in Microsoft 365 Project
- Establishing task dependencies and constraints
- Assigning resources to tasks and managing workloads

Scheduling and Gantt Charts

- Building and managing project schedules using Gantt charts
- Modifying task durations, start dates, and deadlines
- Utilizing critical path analysis to identify project bottlenecks

Resource Management and Allocation

- Defining and managing project resources
- Assigning resources to tasks and tracking resource utilization
- Resolving resource conflicts and adjusting allocations based on availability

Tracking and Monitoring Progress

- Updating task progress and completion status
- Tracking and analyzing project performance and metrics
- Utilizing Microsoft 365 Project reports for project status updates

Collaboration and Communication

- Enabling project collaboration and communication with Microsoft 365 tools
- Sharing project updates, documents, and insights
- Conducting virtual meetings and coordinating project teams

Project Risk Management

- Identifying and assessing project risks
- Creating risk response plans and mitigating strategies
- Monitoring and controlling project risks throughout the project lifecycle

Project Reporting and Analysis

- Generating project reports and charts to communicate project status
- Analyzing project data and identifying trends and patterns
- Utilizing Microsoft 365 Project to make data-driven decisions

Microsoft 365 Project – Intermediate

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.

Duration	1 day
Group Size	Up to 5 people maximum
Prerequisite	No Prerequisite
Course Type	Microsoft 365
Training Room Requirements	<ul style="list-style-type: none">• Meeting Room• TV/Projector• PC/Laptop with Flow per user
Remote Training Requirements	<ul style="list-style-type: none">• 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 Code	O365:PROJ:I

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.

Review of Microsoft Project Fundamentals

- Recap of basic concepts and terminology in Microsoft Project
- Refreshing understanding of project schedules, tasks, resources, and dependencies
- Exploring key features and navigation tools in Microsoft Project

Advanced Task Scheduling Techniques

- Utilizing task types, constraints, and deadlines for precise scheduling
- Applying task dependencies and linking tasks effectively
- Incorporating lead and lag time for accurate task sequencing

Fine-Tuning Resource Management

- Defining resource calendars and availability
- Assigning resources to tasks with varying effort and duration
- Resolving resource conflicts and overallocations

Advanced Resource Analysis and Optimization

- Analysing resource utilization and workload distribution
- Leveraging resource levelling techniques to resolve conflicts
- Utilizing resource contours and calendars for optimized resource management

Tracking and Managing Project Progress

- Updating project status and tracking progress
- Analysing schedule variance and identifying critical tasks
- Incorporating baseline and interim plans for performance evaluation

Advanced Reporting and Analysis

- Customizing views, tables, and filters for project reporting
- Generating and interpreting project reports and dashboards
- Utilizing visual reporting tools and charts for data analysis

Collaboration and Communication with Microsoft Project

- Integrating Microsoft Project with other collaboration tools (e.g., SharePoint, Teams)
- Sharing project information and facilitating team collaboration
- Managing access permissions and security settings for project data

Advanced Customisation and Automation

- Creating custom fields, formulas, and calculations
- Utilizing macros and automation for repetitive tasks
- Customizing project templates and views for streamlined project management

Advanced Project Analysis and Troubleshooting

- Analysing project data and identifying potential issues
- Troubleshooting common errors and problems in Microsoft Project
- Best practices for project recovery and risk management

Integration with Other Project Management Tools

- Exploring integration possibilities with other project management tools
- Importing and exporting data between Microsoft Project and other applications
- Leveraging cloud-based project management solutions for enhanced collaboration

Project Portfolio Management

- Understanding the concept of project portfolio management
- Managing multiple projects and portfolios within Microsoft Project
- Aligning projects with organizational objectives and strategic goals

Go Live Support

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

Duration	8 hours per day
Group Size	Typically 1 trainer per 50 users
Prerequisite	No Prerequisite
Course Type	Go Live Support
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 Code	O365:GLSU

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

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

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

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
Training Room Requirements	<ul style="list-style-type: none">• Meeting Room• TV/Projector• PC/Laptop with Outlook per user
Remote Training Requirements	<ul style="list-style-type: none">• 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 Code	O365:ADES

Course Content

Upon successful completion, delegates will be able to understand:

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
- AD User Accounts and Active Directory Sync
- Understand how Active Directory on premises and AD Sync, including the differences between Cloud, Federated and Synced accounts
- Creating and Managing User Accounts via PowerShell

Exchange Online & Outlook

- Admin: Provisioning User Mailboxes
- Global Directory Management
- Compliance management
- Mobile Device settings
- Protection and spam mail configuration

Power User

- 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 Sites and Content

- 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? (Day 1)
- Working with files and OneDrive for Business
- Working with Sites and Site collections

Document Sharing

- Collaborative Editing
- Teams Integration

Working with files and SharePoint

- Check-in and Check-Out explained
- Navigating a Site
- Working with Apps
- Sort & Filter
- Versions
- Approval
- Microsoft Office Integration

Document Libraries

- Create a Document Library
- Modify Settings and Library Policies
- Create Columns
- Modify Views
- Create Views
- Document Content Types
- Approval Workflow

Lists

- Modern Lists vs Classic Lists
- Create a List
- Modify Settings and List Policies
- Create Columns
- Modify Views
- Create Views

Pages

- Create and Modify a Web Part Page
- Create and Modify a Wiki Page
- Create and Modify a Site Page
- Working with Pages in a Communication Site
- Site Assets

Site Settings

- Customise Site Navigation
- Permissions

Reusable Content

- Managed metadata and the Term store,
- Site Columns
- Site Content Types

Creating Sites

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

SharePoint Administration

- Sharing Settings – global SharePoint and OneDrive sharing options

OneDrive Settings

Managing Active Sites

- Hub Sites
- Sharing settings – Site by site
- Default link settings

Microsoft Teams

- Teams Capabilities: Chat Collaboration Meetings & Calls
- Creating a Team

Chat and Channels

- Files and SharePoint
- Adding Tabs
- Calls, chats and meetings
- Desktop sharing
- Relationship between Teams & SharePoint

External Communication

- Presence
- Security & Compliance in Microsoft Teams
- Teams integration with Microsoft 365
- Teams integration with the Power Platform
- Admin: Teams Architecture
- Team Management Tools & Admin Centres
- Overview of Teams Licensing
- Teams Governance, naming, Archive and Deletion
- Teams Policies – messaging, meeting, app and channel policies. Policy packages
- Exercise: Teams Administration

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 licenses purchased and assigned to users.

Microsoft Teams Direct Routing Administration

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.

Duration	1 day
Group Size	Up to 5 people maximum
Prerequisite	Basic experience with Microsoft 365 Admin Centre
Course Type	Microsoft 365
Training Room Requirements	<ul style="list-style-type: none">• Meeting Room• Access to the in house Microsoft Administration Centre
Remote Training Requirements	<ul style="list-style-type: none">• Sessions will be hosted using Microsoft Teams sessions• Access to the in house Microsoft Administration Centre
Course Code	O365:TDRA:1

Course Content

Upon successful completion, delegates will be able to understand:

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
- Troubleshoot 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

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.

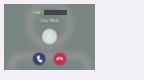
Our training team will work with the client to build bespoke training collateral based on client input and their vision in mind.

Microsoft Teams Voice

Quick Reference Guide: Desktop App

Answering a call

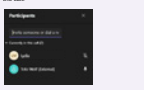
- When someone calls you, you'll get a notification in the corner of your screen that lets you accept or decline the call. You can answer by clicking on the phone icon on your screen or your touchpad headset.
- Click the Phone icon to answer with audio only.
- Click the Video icon to accept the call and enable video as well.



Adding someone to a call

Multi-party calling is allowed. A maximum of 50 people can be added to a call.

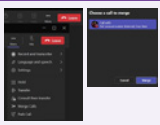
- To add someone new to a group call, select the Show participants icon in your call control.
- Then type their name or phone number in the search box and hit enter. This will add them into the call.



Merging calls

While you're on a call on Teams Desktop with another person for a group call, you might decide you want to ask someone else a relevant question. Make a new call and merge it with an existing call or when the second call connects.

When the second call connects, go to the call controls and select More actions -> Call merge and combine calls you want to merge by clicking on the Merge button.

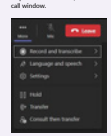


Microsoft Teams Voice

Quick Reference Guide: Desktop App

Putting a call on hold

- To place a call on hold, click More actions in your call window.
- Then select Hold. If you are talking to a single person, they will be notified you have put the call on hold. If you are on a conference call, the other participants can continue to chat while you are on hold.
- To go back to your call, press Resume.



Checking voicemail

Check voicemails from the Calls Section within Teams. You may also receive an email with the voicemail attached and transcribed to text (if possible).

You are not able to check your voicemail from a call/mobile phone. You will need to have the Teams app installed to be able to check your voicemail.

- Navigate to the Calls section.
- Click on Voicemail.
- Voicemails will be displayed in chronological order. Click on the name on number. The voicemail will appear on the right hand side.
- Click the play button to play the message.

Important Notes

You can change the play speed by clicking on the down arrow next to voicemail timeline and selecting the **x1 speed**.

The Transcription is above the voicemail timeline.

Introduction to Microsoft Teams Voice


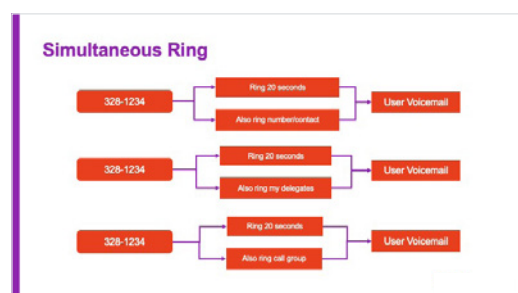
Please be aware that this training session is being recorded

Agenda

- What is Microsoft Teams Voice
- Benefits of Teams Voice
- Current Headsets
- Internal Calls
- External Calls
- Understand Call Window and Call Controls
- Transferring

What are the benefits?

- One phone number for work
- Improve and streamline voice services
- Call from anywhere, anytime on any platform
- No need to give out personal mobile information
- Acquire latest capabilities much faster
- Significantly reduce our on-premise footprint (Move to a fully cloud solution)
- Provide more agile and positive experience for customers.

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.

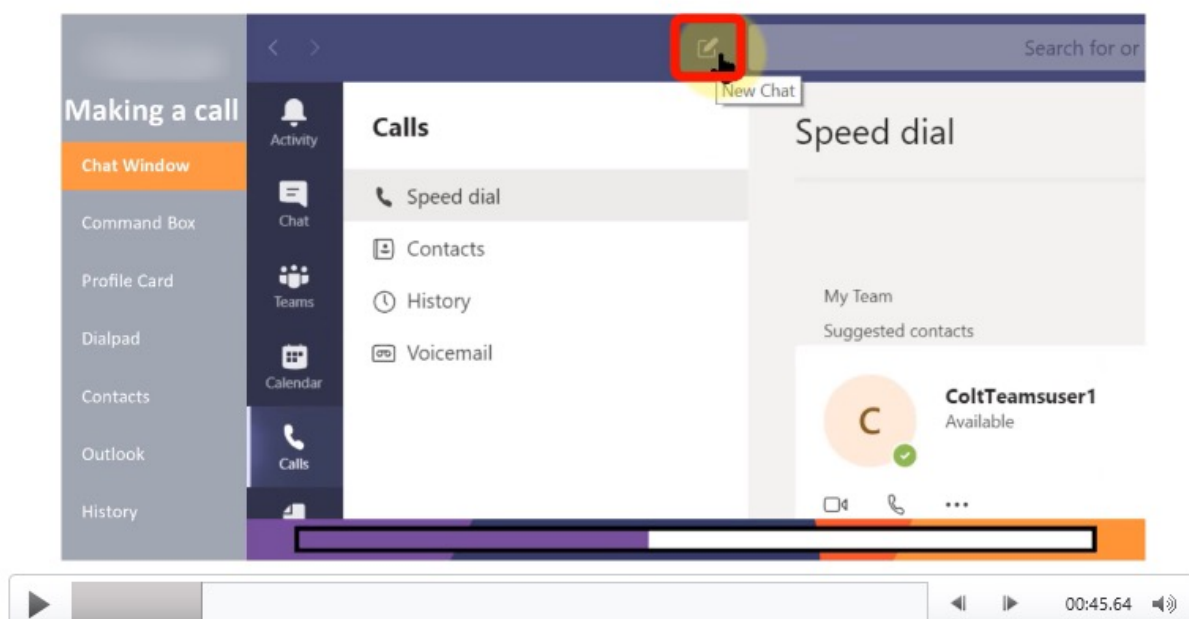
Training videos are concise learning assets that helps to support the intrinsic learning preference to learn by watching and helps create an environment for bite-sized and “micro-learning”, this satisfies multiple learning styles and creates a more relaxing, engaging way to learn, leading to greater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

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.



Example mp4 Video Screenshot

Fast Lane are technology adoption, change management and training experts and we are passionate about connecting people with technology.

We pride ourselves on our high levels of service and would love to help you on your journey to better unified communications.

Find out more

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