

Private Team Training – 48 Standard Courses

Phone: 905-989-0634
www.GumpTraining.com
info@gumptraining.com



In-Person Training (at your office in the GTA/Southern Ontario area - Toronto, Mississauga, etc.):

- \$ 2590 per day for up to 15 people. HST is extra. Pick a full day course or any two half day courses. Each half day course can accommodate either the same group of people or two different groups.
- Half day courses are 3 hours. Full day courses are 6 hours.
- \$ 1690 for one half day course only, for up to 15 people. HST is extra.
- Laptop rentals are available at \$ 75 each per day or half day only session.
- If you are outside of our standard travel area, a travel charge may apply.

Virtual Training (over Zoom):

- \$ 1095 for each half day course, for up to 15 people. HST is extra.
- \$ 2190 for each full day course, for up to 15 people. HST is extra.
- Extra time is needed when virtual (half day course are 3 ½ hours and full day courses are 7 hours).

Notes:

- PDF Course manual included where  appears.
- You can also create a custom course for your team. See our *Master Topic List* PDFs.

Excel Course 1A: Getting Started

Start fresh and build a file from the beginning. This course is tailored for individuals who are new to Excel, seeking a recap of the fundamentals, or aiming to enhance their proficiency and confidence in using Excel.

After this course, the next step is Course 1B

Entering Data

Entering Text and Numbers
Entering & Working with Dates
Selecting Cells / Cell Pointer Icons
Cut, Copy, Paste and Fill Basics

Formatting Cells

Horizontal Cell Alignment
Formatting Numbers
Using Format Cells
The Format Painter, Cancel vs Undo
Delete and Clear Options

Sheet Tasks

Column Widths/Row Heights
Insert/Delete Columns & Rows
Add & Delete Sheets
Rename & Move Sheets
Zooming In and Out
Print and Preview
Saving, Open, New, Close

HALF DAY

Required Prior Knowledge
No Excel knowledge needed



Excel Course 1B: Basic Formulas

This course comprehensively covers all the essential aspects of formulas: operators, the order of operations, utilization of built-in functions, and a clear grasp of relative vs. absolute cell referencing. After this course, you'll be ready to tackle more complex formulas, such as IF and VLOOKUP, etc.

Formulas / Functions

Entering a basic formula
Operators & order of operations
General Use of Excel Functions
Using these Functions:

Sum, Average
Count, CountA, CountBlank
Min, Max
Round, Today, and Now

Absolutes - \$

What is a Relative Reference?
What is an Absolute Reference?
Using Full & Partial Absolutes

Trouble Shooting / Tips

Display Formulas
Editing Formulas
Finding Formulas
Errors & Error Checking

HALF DAY

Required Prior Knowledge
Comfortable with most Course 1A topics



Excel Course 1C: Working with Dates & Times

This course delves into the intricacies of managing dates and times within Excel, covering everything from fundamental concepts like date serial numbers to exploring the diverse array of Date and Time functions at your disposal.

Entering Dates & Times

Entering Dates & Times Properly
Date/Time Formats and Custom Formats
Understanding Date/Time Serial Numbers
Using Fill with Dates or Times
Today's Date (Static and Dynamic)
Current Time (Static and Dynamic)

Date Formulas/Functions

Numbers of Days or Years Between Dates
The Importance of DATE Function
YEAR, MONTH, DAY, DAYS, EDATE,
EOMONTH, WEEKDAY, WEEKNUM,
ISOWEEKNUM, WORKDAY, NETWORKDAYS,
YEARFRAC, DATEDIF

Time Formulas/Functions

Create a Time Sheet to Calculate Hours
TIME, HOUR, MINUTE, SECOND

HALF DAY

Required Prior Knowledge
Knowledge of Course 1B topics is required for this course.



Courses 2A, 2B, 2C and 2D can be taken in any order. The topics are unrelated.

Excel Course 2A: Format & Validation Rules

Understanding Conditional Formatting and Data Validation is vital in today's context, given their widespread use. These are highly valuable features in Excel that can significantly enhance your data management capabilities.

Conditional Formatting

Highlight Cell Rules
Top/Bottom Rules
Data Bars, Color Scales, Icon sets
Using Manage Rules
Clearing Rules
Using Formulas for a Rule
Absolute References in Rules

Data Validation

Restrict Entries in Cells
Customized Error Messages
Suppress Error Messages
Add Input Messages
Simple Drop-Down Lists
Create Drop-Down Lists from Data
Circumvent Validation Settings
Modify Validation Settings
Clear Validation

HALF DAY

Required Prior Knowledge
Solid understanding of most Course 1A topics needed. Helpful if you have some knowledge of Course 1B topics.



Excel Course 2B: Working with a Database

Learn the intricacies of setting up and managing database data effectively. This course covers essential topics such as establishing a valid database, mastering sorting and filtering techniques, and efficiently working with Tables.

Setup a Valid Database

Why Correct Setup is Important
Valid Database Rules
Selecting and Navigating Data
Freeze Headings & Print Titles

Sort & Filter

Basic and Custom Sorting
Activating Filter
Entering/Selecting Filter Criteria
Totalling Filtered Data
Clear & Reapply
Copy/Paste and Delete Filtered Data

Format as Table

Static vs Dynamic Ranges
Working in a Table
Filter with Table Slicers

HALF DAY

Required Prior Knowledge
Solid understanding of most Course 1A topics needed. Helpful if you have some knowledge of Course 1B topics.



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Courses 2A, 2B, 2C and 2D can be taken in any order. The topics are unrelated.

Excel Course 2C: Printing & Sheets

Acquire expertise in configuring print settings, incorporating comments and notes into cells, navigating sheets proficiently, and implementing sheet and cell protection measures.

Page Layout & Printing

Print Preview / Printing
Scaling / Paper Size / Orientation
Margins / Centre on Page
Normal, Page Layout & Page Break Views
Headers and Footers
Print Titles / Page Breaks
The Page Setup Dialog box

Cell Comments / Notes

Adding Comments & Notes to Cells
Edit, Delete, Move, Size, Print Comments
Comment Colour / Adding Pictures
Threaded Comments in 365

Working with Sheets


Add, Rename, Hide, Delete Sheets
Move & Copy Sheets
Using Group Mode
View Multiple Sheets Together

Protect

Protect a Workbook or Sheet

HALF DAY

Required Prior Knowledge

Solid understanding of Course 1A topics. 

Excel Course 2D: Creating Charts

Master the art of crafting charts in Excel, progressing seamlessly from fundamental techniques to advanced strategies and insider tips.

Charts Basics

Create Bar/Line and Pie charts
Selecting, Moving & Sizing Charts
Change Chart Type / Transpose
Quick Chart Layouts & Chart Styles
The Chart Buttons / Printing Charts

Chart Settings & Formatting

The Chart Tabs / The Format Pane
Change Data Ranges / Adding Elements
Select, Move & Sizing Elements
Formatting Chart Elements
Creating Pie of Pie / Bar of Pie
Creating Combo Charts (bar and line)
Trendlines, Error Bars, Up/Down

Other Objects

Adding Shapes, Icons & Pictures
Arrange, Align and Rotate
Group and Ungroup / Shape Size & Position

Creating Effective Charts

Use of Colours, Chart Elements & Objects
Cool Effects for Better Visuals

HALF DAY

Required Prior Knowledge

Solid understanding of Course 1A and 1B 

Excel Course 3: Using IF & VLOOKUP

Acquire proficiency in harnessing the power of two of Excel's most sought-after functions – IF and VLOOKUP. This course also delves into the versatile feature of Range Names, amplifying the utility of your formulas.

The IF Function

IF Arguments
Using IF / Nesting IF's
Multiple Conditions (AND/OR)
Conditional Formatting with IF
The IFS Function (365/2019)

Range Names


Why Use Range Names?
Create/Reference a Range Name
Go to a Range Name
Edit and Delete a Range Name

The VLOOKUP Function

What is VLOOKUP?
VLOOKUP vs. HLOOKUP
Using VLOOKUP
Approximate & Exact Match
IFNA with VLOOKUP
What XLOOKUP (Excel 365)?

HALF DAY

Required Prior Knowledge

Solid understanding of most Course 1A and 1B topics needed. Helpful if you have some knowledge of Course 2A and 2B topics. 

Excel Course 4: More Useful Formulas

Perfect the skill of swiftly generating results that might otherwise be challenging or time-consuming with alternative methods. Explore the efficiency of conditional functions, INDEX MATCH, XLOOKUP, and the intricacies of linking formulas.

Conditional Functions

SUMIF / SUMIFS
COUNTIF / COUNTIFS
AVERAGEIF / AVERAGEIFS
MINIFS / MAXIFS (365/2019)

Linking Formulas to Other Sheets

Link Cell/Formulas/3D Formulas

Linking Formulas to Other Files


Create Linking Formulas
Edit Links Dialog Box / Pane
Finding Links in a File

Using INDEX MATCH & XLOOKUP

XLOOKUP (365)
INDEX / MATCH / XMATCH (365)
MATCH with VLOOKUP
VLOOKUP, XLOOKUP, or INDEX MATCH?
(VLOOKUP Knowledge required)

HALF DAY

Required Prior Knowledge

Solid understanding of Course 1A, Course 1B and Course 3 topics needed. Helpful if you have knowledge of Course 2A and 2B topics. 

Excel Course 5: PivotTables Part 1

Master the art of producing insightful reports swiftly using PivotTables. Gain confidence in building them to enhance your Excel skills.

Create and Format a Table

Valid Database Setup/ Create Table
Dynamic vs Static Ranges
With VLOOKUP, Data Validation & Charts

Get Started with a PivotTable


Creating a PivotTable
Inside/Outside a PivotTable
Columns, Rows, Values and Filters Fields
Moving & Removing Fields
Applying Formatting

Working with a PivotTable

Edit PivotTable Data / Expand & Collapse
Changing Report Layout
Hide/Show/Modify Subtotals / Grand Totals
Sorting and Manual Sort
Filtering Labels & Values
Field Settings / Options / Refresh Data
Changing the Summary Function
Percent, Running Totals, Ranking, etc.

HALF DAY

Required Prior Knowledge

Solid understanding of Course 1A as well as very comfortable using Excel generally. Helpful if you have some knowledge of Course 2B topics. 

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Excel Course 6: PivotTables Part 2

Elevate your PivotTable proficiency! Learn advanced techniques to create reports tailored to your needs, complete with impressive visuals.

Data Source & Details

Table vs Range
Refresh vs Refresh All
Add PivotTable to Sheet / Move it
Creating Filter Pages
Showing Details / Disable Details

Grouping & Calculations

Date Grouping / Using Data Formulas Instead
Number Grouping / Custom Groups
Creating Calculated Fields / Calculated Items
What is GetPivotData?

Printing & Appearance


Print Options / Print Titles
Blank Lines & Page Breaks
Using and Basic Creating Styles
Adding Conditional Formatting

Slicers & PivotCharts

Add Slicers / Slicer Settings & Options
Connect Slicers to Multiple PivotTables
Create PivotCharts

HALF DAY

Required Prior Knowledge

You must know the topics in Course 5 before taking this course. 

Excel Course 6A: Advanced PivotTables

This course delves into advanced PivotTable concepts, unveiling the significance of the Pivot Cache and Data Model. Mastery of these elements empowers you to craft highly customized PivotTables and seamlessly connect multiple datasets within a single PivotTable.

Setting Defaults

Default PivotTable Options
Default Layout

The Pivot Cache

What is it?
Saving the Cache / Saving the Data
Creating a Separate Cache
Using the Same Cache / Cache Count


The Data Model / Relationships

Setting Relationships Up
Multiple Databases in a PivotTable
Working with Sets / Drill Downs
Additional PivotTable Settings
Distinct Count
Options Unavailable

After this course, consider taking Excel Course 6B to link to external data and Course 6C to fully understand the Data Model.

HALF DAY

Required Prior Knowledge

Essential that you have taken or know the topics covered in Course 5 and Course 6. 

Excel Course 6B: Using Power Query

If you find yourself frequently updating or appending datasets, or grappling with sluggish files laden with lookup formulas, it's high time to harness the power of Excel's Power Query. Discover how to seamlessly link to source data, mold it to your specifications, and generate insightful reports, such as PivotTables.

Getting Data

Connect to Excel or Other Data
Load Queries into Excel / Edit Queries
Refresh / Refresh Options
Reference / Duplicate Queries
Merge Datasets / Use Group By
Update Names (File, Sheet, Table, Column)


Basic Column Transformations

Transform vs Add Column
Remove, Duplicate, Format, Work with Dates
Extract, Merge, Split / Fill & Replace Values
Basic Calculations / Conditional Columns

Other Features

Data Types / Sort & Filter
Working with Steps / Remove Duplicates
Data Statistics / Find & Fix Data Errors

FULL DAY

Required Prior Knowledge You must understand how to set up a valid database, the Table feature, and basic PivotTables (topics from Courses 2B and 5). 

Excel Course 6C: Using Power Pivot

Master the intricacies of Excel's Power Pivot tool to efficiently navigate the Data Model. Whether your data originates from Excel files or other sources, this course empowers you to grasp relationships fully and construct PivotTable formulas using the DAX language.

Overview

Quick Review of Relationships
Quick Review of the Data Model
The PowerPivot Window

More About Relationships

Relationships in Diagram view
Snowflake vs Star
How Relationships Flow
Hide Fields or Tables
Creating Hierarchies

Introduction Dax

Adding Calculated Columns
Implicit vs Explicit Measures

Calendar Tables

Why Not Group by Dates?
Create a Calendar Table in Power Pivot
Dynamic Power Query Calendars
Create Calendar Table in Excel

HALF DAY

Required Prior Knowledge You must already know the topics in Excel Course 6A. Knowledge of Course 6B is very helpful, but not required.

Excel Course 7: Introduction to Macros

Unlock greater efficiency by mastering macros. This course guides you through recording macros, basic macro editing, and diverse methods for running and storing macros.

Recording Macros

What is a Macro?
Recording Macros
Running Macros
Buttons & Illustrations to Run Macros
Add Macros to Quick Access Toolbar
Saving and Opening Files with Macros
Using Relative Referencing
Workbook vs Personal Workbook Macros


A Quick Look at VBA

What is Visual Basic?
Working in the VBA Editor
Basic Editing of Recorded Macros

The next step is Excel Course 7A to more fully understand working in the VBA Editor.

HALF DAY

Required Prior Knowledge

Solid understanding of Excel generally. No specific course(s) are required, but you should be a confident Intermediate + user. 

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Notes:

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Excel Course 7A: Intermediate Macros

Explore the VBA Editor in-depth with this course. Gain proficiency in modifying recorded macros and creating customized ones using VBA to execute actions beyond recording capabilities.

Note: This course serves as an introduction to VBA. Achieving a comprehensive understanding of VBA requires more than a half-day session.

Writing Macros

Macros You Can't Record
Macros Triggered by Events
Macro Arguments
Sub vs Function
Module, Sheet or Workbook

Commands/Features

Variables
With, End With
Message Boxes
IF, Else, Endif
The Range Object
Intersect
Exit a Procedure
Display and Calculation

HALF DAY

Required Prior Knowledge

You must have a solid understanding of all Excel Course 7 topics.

Excel Course 8: Tips & Shortcuts

Uncover the secrets to heightened productivity with this course. Delve into the often overlooked yet powerful time-saving features that will transform your workflow significantly. Topics covered as time permits.

Great Features

Show Sheets in Separate Windows
Hyperlinks to Navigate Workbook
Custom Number & Date Formats
Customize the Quick Access Toolbar
Concatenating
Create Custom Fill Lists
Check Boxes in Cells
Goto Special to Select / Cell Styles
Data Types / Quicker Hide Columns & Rows
Save Filters or Print Settings

Quick Tips

Trick with Absolute Referencing
Copy Visible Cells Only
Quick Ways to Navigate, Select & Move Data
AutoFit Column Cell Range
Zoom to Width of Data
Formatting Tricks
Quick Paste Values / Don't Merge Cells!
Go Back to Cell Pointer / Copy Cell Above
Cell Messages / In Cell Pictures

HALF DAY

Required Prior Knowledge

You should know at least the topics in Course 1A and Course 1B and consider yourself an Intermediate or better Excel user.

Excel Course 9: Clean Up Imported Data

Perfect your data reporting in Excel by mastering efficient data cleanup techniques. This course equips you with the skills to streamline and optimize your reporting process.

Import & Fix Text Files

Import .CSV, .TXT, .PRN
The Text Import Wizard
Fix Bad Dates and Bad Numbers
Transpose
Finding duplicates

Splitting Data

Using Flash Fill to split columns
Using Text to Columns

Concatenating

Combining cell contents
Combining different data types

Use Text Functions to Fix Data

Left / Mid / Right / Len / Search / Trim / Text
Clean / Lower / Upper / Proper / Value
NumberValue / Substitute / FormulaText

New 365 Functions

TextBefore / TextAfter

HALF DAY

Required Prior Knowledge

Solid understanding Course 1B and Course 2B. You should consider yourself an Intermediate or better Excel user.

Excel Course 10: More Data Features

Refine your Excel skills with this course, exploring three powerful features—advanced filtering, grouping, and consolidating. Learn to effortlessly manipulate data for the precise results you seek.

Advanced Filter

Filter vs. Advanced Filter
The three ranges
Simple and formula-based criteria
Performing a filter
Using OR conditions
Using range names
Copy unique records
(You should already be familiar with the regular Filter feature.)

Creating Groups & Subtotals

Using Auto Outline
Manually Creating Groups
Collapse and Expand
Hide/Show Outline Symbols
Adding Subtotals / Subtotal options / Remove

Data Consolidation

Consolidate by position
Consolidate by category

HALF DAY

Required Prior Knowledge

Solid understanding Course 1B and Course 2B. You should consider yourself an Intermediate or better Excel user.

Excel 365 Course 11: Dynamic Arrays - Part 1

Explore the transformative power of the new Calculation Engine in Excel—its most significant formula change to date. Dynamic Arrays empower you to swiftly achieve results that were once challenging and time-consuming.

Arrays

What is an Array?
Old CSE Arrays vs DA Arrays
How to “Spill” a Formula
The #SPILL! Error
Implicit Intersection
Compatibility with other Features
Forward & Backward Compatibility
Array Constants

Array Functions

SUMPRODUCT vs SUM
TRANSPOSE & FREQUENCY Now Easy

Dynamic Array Functions

Sort
Filter
Unique
Sequence

HALF DAY

Required Prior Knowledge

This course is for Excel 365 users who are already familiar with basic and intermediate formulas and functions. You should at least know the topics covered in Course 1B, Course 3, and Course 4.

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Excel 365 Course 11A: **Dynamic Arrays - Part 2**

Discover the art of crafting fully dynamic reports with advanced Dynamic Array functions. Building on the foundation laid in Course 11, this session explores more intricate and powerful techniques.

Dynamic Array Functions


SortBy
Advanced Criteria using Filter
RandArray
TextSplit
VStack / HStack
Expand
ToRow / ToCol
WrapRows / WrapCols
Take / Drop
ChooseRows / ChooseCols

Dynamic Reports

Creating Reports with DA Functions
Creating Dynamic Charts

HALF DAY

Required Prior Knowledge

You must know the topics in Course 11 before taking this course. 

Excel 365 Course 12: **Advanced Formulas**

In this Excel 365 course, unlock the potential of advanced functions and gain insights into the impact of specific formulas and range names on your workbooks.

Functions Covered

INDIRECT / OFFSET / MOD
ROW / ROWS
COLUMN / COLUMNS
SHEET / SHEETS
TEXTBEFORE / TEXTAFTER
TEXTJOIN / ARRAYTOTEXT
CELL
LAMBDA / LET

About Formulas


Manual Recalculation
What are Volatiles?
Improving Performance

Advanced Range Names

Range Name Constants
Relative Range Names
About Dynamic Range Names

HALF DAY

Required Prior Knowledge

Solid knowledge of formulas and functions in Excel. Minimum knowledge required before taking this course: Course 1B, Course 3 and Course 4. In addition, an understanding of *Dynamic Spill Arrays* is necessary (Course 11). 

Excel 365 Course 13: **Creating a Dashboard**

In this Excel 365 course, master the art of crafting interactive dashboards with form controls, enhancing your data visualization skills.

You must understand Dynamic Arrays (Course 11) and creating charts (Course 2D) before taking this course. You should also be familiar with these functions: IF, INDEX and conditional functions such as SUMIF and COUNTIF.

Using Form Controls


Drop Down
List Boxes
Scroll Bars
Option Buttons

Creating the Dashboard

Linking Formulas to Display the Data
Interactive Charts with Form Controls
Data Selection Form Controls
Text Boxes with Linked Formulas
Design/Format the Final Dashboard
Hide and Lock Raw Data/Formulas

HALF DAY

Required Prior Knowledge

Knowledge of most topics in Course 1B, Course 2D, Course 3, Course 4, and Course 11. 

Build Reports with **Power BI**

In this course, unleash the capabilities of Power BI Desktop as you discover how to craft dynamic, interactive reports from Excel or other data sources. Learn to seamlessly publish and share these reports, empowering your colleagues to view and interact with the data.

Overview

How to Install Power BI Desktop
Getting Data
Transform Data in Power Query
Relationships
Refresh

Setup Reports


Add Fields / Visualizations
Move, Size, Filter
Change Formats & Settings
Add Quick Measures

Deliver Reports

Save a Report
Publish a Report
Share a Report
Add a Teams Tab with a Report
Embed Live Data in PowerPoint

HALF DAY

Required Previous Knowledge

You will need knowledge of the Power Query editor prior to this course (Excel Course 6B). 

Stay Organized with **OneNote**

Unlock the potential of OneNote, a hidden gem often overlooked but incredibly useful. Once you master its features, you'll wonder how you ever managed without it!

Introduction/Overview

Notebooks
Sections & Section Groups
Pages & Sub Pages
Containers

Adding Content

Text, Bullets/Number Lists
Create Tables
Insert Links
Add Pictures
Insert Files
Add Drawings/Shapes
Screen Clippings

Features

Using Search & Find
Zoom Page
Zoom Everything
Using Tags / Find Tags
Page Colour
Rule Lines
Templates
Notebook Recycle Bin

HALF DAY

Required Previous Knowledge

Basic use of Windows and a mouse 

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PowerPoint Course 1: Getting Started

Commence your PowerPoint journey from the ground up, mastering the fundamentals. Whether you're a newcomer, seeking a basic review, or eager to enhance your skills, this course is designed to boost your confidence and proficiency in using PowerPoint.

Overview

How Presentations are Organized
Normal & Slide Sorter Views
Slide Layouts & Background
Working with Objects (Select, Move, Copy)

Text

Placeholder Text
Add Text
Format Text

Shapes & Pictures

Add Shapes, Pictures & Icons
Sizing Objects
Send to Front or Back
Align Objects
Group & Ungroup
Rotate & Flip

Charts

Add Charts
Work with the Data
Chart Formatting

HALF DAY

Required Previous Knowledge
Basic use of Windows and a mouse



PowerPoint Course 2: Features

Enhance your efficiency and productivity in PowerPoint with this course. Explore the intricacies of working with various objects—text, pictures, and illustrations—and discover the power of Master Slides for ensuring a cohesive and polished appearance across all your slides.

Shapes

Review of Align & Group
Copy & Duplicate
Edit Shapes / Merge Shapes

Using SmartArt

Creating SmartArt / Convert Text
Layouts / Colours / Designs
Working in the Text Box
Formatting the Graphic

Pictures

Colour Correction, Effects & Transparency
Remove Picture Backgrounds
Aspect Ratio, Crop and Compress

The Selection Pane

Show / Hide Objects / Re-order / Rename

Slides

Using the Grids & Guides / Reuse Slides
Edit Slide Master
Using Speaker Notes

HALF DAY

Required Previous Knowledge
PowerPoint Course 1 Topics



PowerPoint Course 3: Presenting Slides

Explore the art of impactful slide presentation in this course, covering transitions, animations, zoom slides, and design strategies that effectively convey your ideas and information. Master the techniques to captivate your audience and deliver compelling presentations.

Good Slide Deck Design

Content & Focus (top 5 tips)
Slide Show Presenter View
Using Live PowerPoint in Teams

Zoom Slides

Zoom to a Slide
Create Sections
Section Zoom
Summary Zoom

Transitions

Add Transitions
Set Options
The Morph Transition

Animations

Add Animations / Effect Options
The Animations Pane
Animate Charts

HALF DAY

Required Previous Knowledge
PowerPoint Course 1 Topics and most
PowerPoint Course 2 Topics



Outlook Course 1: Getting Started

Embark on a journey from the fundamentals, delving into the basics of Outlook. Whether you're a newcomer, seeking a refresher, or aiming to enhance your proficiency, this course is tailored to elevate your confidence and expertise in using Outlook.

Overview

Outlook Components
Navigating
What are People, Tasks & Notes
Using Search

Email

Creating and Formatting Messages
Send, Reply and Forward Emails
Add Attachments
Setup/Modify Email Signatures
Create Folders/Move Messages
Drafts, Sent Items, Outbox, Deleted Items, Junk

Calendar

Calendar Views
Add Appointment
Add Meetings & Teams Meetings
The Scheduling Assistant
Sharing Calendars

HALF DAY

Required Previous Knowledge
Basic use of Windows and a mouse



Outlook Course 2: Time-Savers

Unleash the full potential of Outlook! Discover advanced features, tips, and shortcuts to supercharge your efficiency in managing emails and schedules.

Useful Features

Colour Categories
Quick Parts
AutoCorrect
Email Templates
Flags
Rules
Quick Steps
Conditional Formatting

Quick Tips

Using Dictate
Email Polls
@Mentions
The View tab
Post to Folder
Multiple Windows
Drag and Drop
Quick Calendar Tips

HALF DAY

Required Previous Knowledge
Outlook Course 1 Topics



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In-Person Training (at your office in the GTA/Southern Ontario area - Toronto, Mississauga, etc.):

- \$ 2590 per day for up to 15 people. HST is extra. Pick a full day course or any two half day courses. Each half day course can accommodate either the same group of people or two different groups.
- Half day courses are 3 hours. Full day courses are 6 hours.
- \$ 1690 for one half day course only, for up to 15 people. HST is extra.
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- If you are outside of our standard travel area, a travel charge may apply.

Virtual Training (over Zoom):

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- \$ 2190 for each full day course, for up to 15 people. HST is extra.
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Notes:

- PDF Course manual included where  appears.
- You can also create a custom course for your team. See our *Master Topic List* PDFs.

Word Course 1: Getting Started

Whether you're a newcomer or looking for a Word refresher, this course covers the basics to enhance your confidence in using Microsoft Word.

Overview

Editing Text
Selecting Text
Undo & Redo
Zooming
Save, Open, Close, & Create Documents
Printing

Document Formatting

Bullet & Numbered Lists
Fonts & Attributes (fonts, sizes, bold, colour)
Paragraph Options (left, center, right, indent)
Paragraph Marks & Other Symbols
Cut, Copy & Paste
Setting Margins & Orientation
Setting Tabs
Adding Page Breaks

HALF DAY

Required Previous Knowledge
Basic use of Windows and a mouse



Word Course 2: Formatting

Many individuals use Word regularly, yet navigating document layout and formatting can be a challenge. If you've ever felt like you're "fighting" with Word to accomplish your tasks, this course is tailored for you.

Section Breaks

Understanding Section Breaks
Section Break Types
Add, Change and Remove
Protect Sections

Headers & Footers

Inserting Headers & Footers
Pre-sets and Fields
Odd, Even, First Page
Changing Page Numbering

Tables

Inserting Tables
Summary of Features

Styles

Applying Styles to Text
The "Normal" Style
Modifying Styles
Creating Custom Styles

HALF DAY

Required Previous Knowledge
Word Course 1 Topics



Word Course 3: Features

Explore the untapped potential of Word through its incredibly useful features. This course delves into time-saving tools, like Quick Parts, and addresses essential features, such as Tracking Changes, that are crucial in today's context.

Quick Parts

Create/Insert Building Blocks
Using the Organizer

Bookmarks

Why Bookmarks are Useful
Insert, Jump to, Display & Delete

Tracking Changes

Track Changes in a Document
Accepting or Rejecting Changes
Change the Display of Revisions
Track Changes Options

Templates

Creating & Using Templates
File Location for Templates
Protecting Template Sections

Forms

Designing a Form / Use a Form
Plain Text and Rich Text Fields
Combo Boxes and Check Boxes
Protecting & Grouping

HALF DAY

Required Previous Knowledge
Word Course 1 Topics



Microsoft Project Course 1: Building a Plan

Embark on your Microsoft Project journey with this introductory course. Gain fundamental insights into project plan setup, covering tasks entry, working hours configuration, non-working days, and plan formatting.

Plan Setup

Initial Settings
Modifying the Calendar
Understanding Views & Tables

Working with Tasks

Entering Tasks, Durations, Dates
Task Mode / Constraints / Critical Path
Linking Tasks / Link Types / Lag & Lead
Notes / Summary Tasks

Gantt Chart View

Adding, Moving & Hiding Columns
Filtering, Highlighting & Grouping
Formatting Columns & Gantt Chart
Changing the Chart Timescale

The Timeline

Add/Remove Tasks
Adjust Gantt Chart View
Add Timeline Bars

FULL DAY

Required Previous Knowledge
Knowledge of basic Excel helpful, but not required.



Microsoft Project Course 2: Resources & Tracking

After mastering the basics, delve into resource and cost management, and discover how to effectively monitor project progress against the initial plan. Elevate your Microsoft Project skills to optimize resource allocation and keep your project on track.

Resources

Adding Resources
Assigning Resources to Tasks
Resource over Allocation
Leveling & Task Priority
Adding Material & Cost Resources
Resource Views & Tables

Tracking

Setting a Baseline
Updating Tasks with Actual Results
Compare Plan to Actual & Adjust Plan
Results as of a Status Date
The Tracking Gantt
Gantt Tables

Reports

Running Built-in Reports
Modifying Reports

FULL DAY

Required Previous Knowledge
Project Course 1 Topics



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Acrobat Pro/Standard Course 1: Get Started

Unleash the full potential of Acrobat by exploring its fundamental tools. Learn the art of creating PDFs, including essential settings. Delve into the intricacies of editing PDF files and efficiently organizing pages within a PDF.

Overview

Acrobat Pro/Standard vs Reader
Navigating the Acrobat Screen
Open, Save, Print, Close
Zoom & Page Display

Creating PDFs

Create from Microsoft products
Create from any program

Search & Navigate

Find Text in Document
Using the Page Thumbnails
Using Bookmarks

Edit PDFs

Editing , Adding & Formatting Text
Adding Links & Bookmarks

Organizing

Organize Tool vs Page Thumbnails
Re-order, Rotate, Insert & Delete Pages
Extracting & Replacing Pages

HALF DAY



Basic Signatures

Fill & Sign / Using a Digital ID

Acrobat Pro/Standard Course 2: Fillable Forms

Build on your foundational knowledge by mastering the creation of fillable forms in PDFs. Explore the tools available for crafting forms, and learn to seamlessly test, modify, and distribute them. Discover an effortless method for collecting and managing responses.

Creating Forms

Using the Form Tool
Auto Detect Fields On/Off
Adding Text or Fields

Fields & Properties

Text / Check Box / Radio Buttons
List Boxes / Dropdown Lists / Buttons
Images / Dates / Signatures
Basic Formulas

Formatting

Alignment, Spacing & Size Matching
Create Multiple Copies
Moving & Sizing
Tab Order

Use & Modify a Form

Test Form & Clear
Filling in a Form
Replacing Form PDF with Updated PDF
Collect Responses

HALF DAY

Required Previous Knowledge

Acrobat Course 1 Topics



Microsoft 365 Online Apps

This course provides a fundamental overview of the office.com portal, explores widely used apps, and highlights distinctions between the online and desktop versions.

Overview

Logging In
Working in Home Screen
Loading Apps or Opening Files
Working with Browser Tabs
What Apps do I have (Licenses)

Excel, PowerPoint, Word & Outlook Online

When to use Desktop vs. Online App
Online vs Desktop versions

A Quick Look At Using

OneDrive / Forms / Planner
OneNote / To Do / Whiteboard

What are these Apps?

PowerApps & Power Automate
Lists, Bookings & Kaizala
Power BI
Yammer
Sway & Stream
SharePoint & Teams
Visio / Viva Insights & Add-ins

HALF DAY



Separate courses are available in OneDrive, Teams, SharePoint, Forms and Planner.

Building Forms with Microsoft Forms

Master the art of crafting surveys, quizzes, and polls with Microsoft Forms. This course empowers you to seamlessly create, share, and distribute dynamic forms for diverse purposes such as gathering customer feedback, assessing employee satisfaction, or coordinating company events.

Overview

What is the Forms App?
Create, Edit, Delete Forms
Create Collections
Use Quick Import
Status Alerts & Remind

Survey & Quiz

Add, Edit & Delete Questions
Choice, Text & Date
Rating, Ranking & Likert
Upload File & Net Promoter Score
Add Sections
Preview & Test

Open, Share Forms

Collect Responses
Collaborate or Duplicate
Form Settings & Themes
Response Data

Forms in Other Apps

Add Polls in Teams
Add Polls in Outlook

HALF DAY

Teamwork Using the New Planner App

Efficiently organize teamwork with the new Planner app inside of Microsoft Teams. Planner is a user-friendly tool for visual task management. This course guides you through creating dynamic Kanban boards, enhancing task cards with comprehensive details like files, checklists, and labels. In this course, we work inside the Teams desktop application to use Planner. Once the new Planner web app is released, this course will also use Planner web.

Overview

What is Planner?
Working with Plans
Microsoft Groups
Open / Create a Plan
Plan Settings

Tasks

Creating Buckets
Creating & Assigning Tasks
Task Settings
Moving, Completing, Deleting Tasks

Views

Tasks Assigned to Me
My Tasks in To Do App
Group By & Filter
Chart & Schedule Views
Open Plan in Teams

HALF DAY



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Use OneDrive Online File Management

Enhance your OneDrive proficiency with an in-depth exploration of its features, beginning with fundamental aspects. Uncover the full potential of file storage in OneDrive, learning advanced functionalities often overlooked. Elevate your file management skills and maximize the benefits of using OneDrive through comprehensive insights provided in this enlightening course.

Overview

What are OneDrive & SharePoint?
Office.com Home Page

The OneDrive App

My Files / Home / Shared / Recycle Bin
Creating Folders / Creating Documents
Opening Files (Online or Desktop Apps)
Upload Files / Rename Files
Copy, Move & Delete Files / The Recycle Bin
Download / Preview Files
Show Details / Using Search
Access Shared Libraries / Add Shortcuts
Working with Version History
Sharing Files / File Requests / Co-Author

Word, Excel, PowerPoint Online/Desktop

Rename Files / Open Files
AutoSave / Version History / Sharing

The Sync Client

Using File Explorer
Working Offline

HALF DAY



SharePoint Online Course 1: Getting Started

Dive into Microsoft's collaboration platform, exploring the SharePoint Start Page, Team site navigation, Microsoft 365 Groups and working in Document Libraries.

Overview

What is SharePoint
Site Types / Understand Permissions
OneDrive or SharePoint
Ways to Access a Site
Microsoft 365 Groups
The SharePoint Start Page

Get Started in a Team Site

Site Navigation / News Articles
Spaces, Notebook, Group Mailbox,
Planner Plans & Teams
A Quick Look at Lists

Get Started in Libraries

Main and Other Document Libraries
Select, Open, Create Documents
Upload, Download, Rename, Delete
Live Co-Authoring / File Checkout
Create & Navigate Folders
Move and Copy
Add Alerts / Version History

FULL DAY



SharePoint Online Course 2: Libraries & Lists

Building upon Course 1, this session delves into intermediate topics such as customizing Libraries and proficiently creating and managing Lists. Explore the intricacies of tailoring Libraries to meet specific needs and master the art of working seamlessly within Lists.

Libraries

Share Documents
Pin Documents
Sort, Filter & Group By
Move Columns / Add Columns
Create Custom Columns / Create Views
Work in Grid View
Create a Library

Lists

Create a List / Create a List from Excel
Add Columns / Add Excel Data to a List
Delete, Alerts, Version History
Grid View, Views, Share, Favorite
Export to Excel / Creating Rules
About PowerApps Forms / The Lists App

HALF DAY

Required Previous Knowledge

You must know the topics covered in SharePoint Course 1 before taking this course.



SharePoint Online Course 3: Working with Pages

Unlock the potential of SharePoint Pages in this course as you delve into editing the Home page, crafting diverse page types, and incorporating links for seamless access. Gain the skills to shape dynamic and engaging pages, fostering effective communication and collaboration within your SharePoint environment.

Overview

Create a Page
Layout of a Page / Page Settings
Add Sections / Add Web Parts

Working with Pages

Edit the Home Page
Add and Edit News & Regular Pages
Create a Basic Space
Manage Pages

Links

Create Links to Pages
Edit The Quick Launch

HALF DAY

Required Previous Knowledge

You must know the topics covered in SharePoint Course 1 before taking this course. You do not need to know the topics in Course 2 as they are unrelated.

SharePoint Online Course 4: Site Owner

In this course, you'll delve into the essentials of overseeing a Team site for collaborative use. Explore the creation of the site, customization of its appearance, addition of members, and configuration of permissions across the site.

Sites

Create a Team Site
Templates & Themes
Basic Site Settings

Permissions

Microsoft 365 Groups
Default SharePoint Groups
Create SharePoint Groups
Setting Permissions at the Site, Library, Folder and File level

Site Components

Working in Pages
Working in Site Contents
Edit The Quick Launch

HALF DAY

Required Previous Knowledge

You must know the topics covered in SharePoint Course 1 before taking this course. You do not need to know all the topics in Courses 2 and 3, but you should have a solid understanding of the various site components and how they work.

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Microsoft Teams Course 1: Teams & Chat

Uncover the myriad capabilities of Microsoft Teams beyond meetings in this comprehensive course.

Overview

What is Teams? / Signing In

Teams

- Creating a Team
- Adding & Saving Posts
- Using @mentions
- Stream, Praise, Approvals & Forms
- Working with Files
- Creating Channels
- Hiding, Pinning, Moving Teams
- Team Settings, Moderators & Tags
- Adding Tabs

Chat

- Sending Messages / Attaching Files
- Group Chats
- Search & Filter / Hide, Mute & Pin

General

- Adding Your Own Apps
- Changing Your Settings
- Setting Your Status
- The Activity Feed

FULL DAY



Microsoft Teams Course 2: Meetings & Calls

In today's landscape, mastering the art of participating in and leading Teams meetings is crucial. This course provides insights into scheduling and joining meetings, as well as making calls.

Calls

- Adding Speed Dials / Contact Groups
- Making Calls / Setting Your Status

Scheduling Meetings

- Private vs Channel Meetings
- The Calendar
- Schedule a Meeting in Teams or Outlook
- Setting Meeting Options
- Using Meet Now
- Joining Meetings

Meetings

- Your Audio/Video Settings
- Ways to View Others
- Show Participants
- Using Chat / Using Reactions
- Meeting Options / Meeting Notes
- Recording, Captions & Transcriptions

Post-Meeting

- Recordings & Transcriptions
- Attendance Reports
- Chat & Meeting Notes
- Calendar Event

HALF DAY



Microsoft Teams Course 3: Advanced Meetings

Building on the foundations laid in Course 2, this session delves into advanced features of Teams meetings. Explore screen sharing capabilities, configure breakout rooms, conduct polls and Q&A sessions, and gain a comprehensive understanding of various meeting roles.

Screen Sharing

- Sharing Your Screen
- Entire Screen / Region
- Sharing Sound and Video
- Whiteboard
- PowerPoint Live & Excel Live
- Remote Control

Breakout Rooms

- Setting Up in Advance
- Opening Rooms
- Broadcast and Join a Room
- Designate Others to Manage Rooms

Polls / Q&A

- Setting Up Polls / Launching Up Polls
- Poll Results
- Setting Up Q&A / Moderating Q&A

Meeting Roles

- Attendees vs Presenters / Changing Roles

Required Previous Knowledge **HALF DAY**
Teams Course 2 Topics

Choose the Training Option That Suits You Best

In-Person Training: For those in Southern Ontario, nothing beats the benefits of in-person training. Participants experience enhanced engagement as the instructor moves around the room, providing individual assistance. The sessions are more interactive, fostering increased questions and participation.

Virtual Training: If you're located outside Southern Ontario or need a flexible setup due to remote work, virtual training is the ideal solution. Participants join via Zoom, where they can see the instructor's live video and program screen. This interactive format allows for questions and assistance, ensuring an engaging and effective learning experience.

PRODUCT	MINIMUM QTY	EXTRA FOR STOCK	COST PER ITEM	TOTAL ORDER COST (U.S.)	CONI COST	CONI SELLING PRICE
7 Hammers, 1/2 Inch	175	146	\$ 4.99	\$ 1,601.79	\$ 17,500.2	
8 Nails/Gross	3,459	1,500	\$ 0.03	\$ 148.77		
9 Drill Bits/Gross	8,975	3,000	\$ 0.05	\$ 598.75		
10 Saw	54	46	\$ 7.50	\$ 750.00		
11 Screwdriver, Flat	87	19	\$ 1.25	\$ 125.00		
12 Wrench	33	67	\$ 2.50	\$ 250.00		
13 Hammers, 1/4 Inch	12	88	\$ 4.99	\$ 499.00		
14 Saw (power)	8	12	\$ 15.99	\$ 319.80		
15 Screwdriver, Phil	65	35	\$ 1.50	\$ 150.00		

