

# Microsoft and Zoom Training

## Microsoft Teams: Meetings and Chat

When you need to connect with an internal or external team member, you can do that through Teams. Whether it's a quick chat, one-on-one call, or group meeting, Teams makes it easy to schedule and connect online. It's as simple as just click Join! Learn how to do all your meetings and chat using Microsoft Teams. To learn more Teams features and tools after completing these topics, check out the complementary training: Microsoft Teams: Collaboration Solutions. **Who Should Attend:** Individuals who have Microsoft Teams installed on their computer.

### Learning Objectives:

- Collaborate with your colleagues and peers using the Teams chat, reducing the volume of internal email.
- Organize and prioritize chat messages.
- Develop, modify, and share files collaboratively using Teams.
- Schedule meetings and send invites via Teams without needing to go to Outlook.
- Plan, hold, and record meetings securely in Teams.

## Microsoft Teams: Collaboration Solutions

Regular team meetings or special projects should have a home—Teams should be that home. In addition to the meetings/call/chat features covered in the earlier session, you'll learn how file sharing, collaboration, and tools such as Planner, Forms, and other integrations make Teams the most streamlined form of connection and collaboration. To learn in-depth information on Teams before starting these topics, check out the complementary training: Microsoft Teams: Meetings and Chat.

**Who Should Attend:** Individuals who have Microsoft Teams installed on their computer.

### Learning Objectives:

- Develop a Channel for your Team(s).
- Create a message thread by posting, replying, and reacting to messages in the Channel, reducing email volume.
- Use Teams to collaborate within different departments, initiatives, and projects for searchability, accountability, transparency, and consistency.
- Streamline Team meetings for all members using the Channel to create, edit, record meetings, and save files.



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## Microsoft 365: Leverage the Full Power

You're familiar with the standard Office products—Outlook, Word, Excel, PowerPoint—but Microsoft 365 is so much more than that. In addition to cloud storage and collaboration features, you'll learn about the other tools available in the M365 subscription and how those tools can save you time and frustration while improving productivity. This is not a Microsoft Office 101 class; those already familiar with the basics of Office will benefit most from this training. **Who Should Attend:** Individuals who have Microsoft Office installed on their computer and are already familiar with the basics of Office.

### Learning Objectives:

- Navigate M365 products available to you within Microsoft Office 365.
- Discover the M365 product that is best matched to complete a specific task and improve productivity.
- Access M365 on your mobile device.
- Manage permissions within M365.

## Overcoming Inbox Overwhelm: Inbox Zero and Workflow Prioritization

Is your inbox overflowing with emails? Managing email is becoming more difficult as the influx of emails grows. More emails may mean a cluttered inbox, which can result in anxiety and frustration. This training will discuss effective tips that will help you reduce your anxiety and maximize your time through effective email management. This is part one of a two-part series. After completing this training, check out part two: Overcoming Inbox Overwhelm: Streamline Your Processes. **Who Should Attend:** Individuals who have Outlook or Gmail installed on their computer.

### Learning Objectives:

- Reduce the amount of time you spend in your email.
- Organize and manage your email using a strategic process.
- Quickly and easily prioritize urgent and important messages or tasks.
- Use flags and categories to manage your mailbox.

## Overcoming Inbox Overwhelm: Streamline Your Processes

Are you looking for systems to improve your speed in Outlook or reduce repetitive activities? There are so many ways to streamline your processes such as rules, templates, search folders, and standardized subject lines. If you want to save time and frustration in using Outlook, this training is for you. This is part two of a two-part series. Before starting this training, check out part one: Overcoming Inbox Overwhelm: Inbox Zero and Workflow Prioritization. **Who Should Attend:** Individuals who have Outlook or Gmail installed on their computer.

### Learning Objectives:

- Streamline the process to manage your mailbox.
- Create message templates to quickly send repeated messages.
- Group and find messages using the conversation view.
- Use custom search folders with specific criteria to find specific messages.
- Locate messages faster using standard subject lines and hashtags.
- Set rules to direct your inbox messages to a processing folder.

## Microsoft Planner: Manage Your Projects

Are you looking for a tool that can help manage all the tasks, files, and timelines for a project? Then Microsoft Planner should be on your radar. If you've been using Trello, Asana, or another tool, check out this training and compare how Planner might meet your needs and save money for your organization.

**Who Should Attend:** Individuals who have Microsoft 365 and Planner installed on their computer.

### Learning Objectives:

- Create a plan in Microsoft Planner.
- Organize and group tasks in buckets or by labels to visually show priority, due dates, and progress.
- Apply filters to view tasks differently.
- Check progress using your dashboard.

## Microsoft Outlook: To Do

If you're looking for your to-do list in all the wrong places, it's time to leverage your technology and get it all in one spot. When you use Microsoft To Do, you can grab all your flagged emails, Outlook Tasks, and Planner Activities and prioritize them in one application (both desktop and mobile). This training will introduce you to all the task management tools in the Microsoft Office 365 suite and show how they all can work together. Whether you're not using any of the tools or have some experience on any, you'll be sure to improve productivity by taking this training. **Who Should Attend:** Individuals who have Microsoft 365 and Outlook installed on their computer.

### Learning Objectives:

- Navigate your tasks in To Do by My Day, Important, Planned, Assigned, and Lists.
- Sort your tasks using Planned, Assigned, and Lists.
- Create multiple task lists and group lists.
- Add steps to your tasks such as notifications, due dates, categories, and attaching files for more detail.
- Set your preferences for your To Do settings to enable automated workflow.

## Unleash the Power of Teams—Increasing Effective Decision Making

Now more than ever, organizations are using video to communicate their messages. Rather than invest in additional software, learn how to use PowerPoint to create powerful multimedia messages, including looping kiosk videos, narrated videos, and training demonstrations. No additional video-editing software required. This training is for individuals who have Microsoft PowerPoint installed on their computer.

This is not a PowerPoint 101 class and those who are already familiar with the basics of PowerPoint will benefit most from this training. **Who Should Attend:** Individuals who have Microsoft PowerPoint installed on their computer and are already familiar with the basics of PowerPoint.

### Learning Objectives:

- Create more impactful PowerPoint presentations using multimedia.
- Increase multimedia automation in PowerPoint.
- Record and produce videos within PowerPoint.
- Integrate multimedia tools within PowerPoint.

## Microsoft Excel: Tips, Tricks, and Shortcuts

If you're looking for quick tips to improve your use of Excel, this is the training for you. No matter what your current level, you will get nuggets of wisdom to help you save time—and we make the training fun. You will learn valuable keyboard shortcuts, insider tips, and hacks to get more meaning out of your data faster. If Excel is not fun for you (yet), don't worry—Jennifer Buchholz of Excel and Flourish teaches in a way that helps all levels of learners. If you haven't taken an Excel training lately (or ever), we promise you will learn something to save you time! **Who Should Attend:** Individuals who have Microsoft 365 and Excel installed on their computer.

### Learning Objectives:

- Use keyboard shortcuts to navigate the worksheet.
- Write formulas with a relative and absolute cell reference.
- Select cells to autofill and flash fill data in a row or column.
- Apply the \$ in a formula to lock the formula creating an absolute cell formula.
- Set conditional formatting rules for specific cells.
- Quickly create pivot tables and charts without writing formulas.

## Zoom Best Practices

Looking to have a better presence in Zoom? Want to use advanced features like breakout rooms and polls? Want to add more engagement to your Zoom classes? In this training, Jennifer Buchholz, owner of Excel and Flourish, shares the basics and best practices so you will look like a pro when scheduling your next Zoom meeting. **Who Should Attend:** Individuals who use Zoom for meetings or presentations.

### Learning Objectives:

- Create a free Zoom account.
- Use the video and audio features in Zoom.
- Personalize settings for more effective Zoom meetings.
- Save work produced during a Zoom meeting.