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Training Event Form

- Activity:** ***Mastering Microsoft 2007***
Duration: Two (2) half day workshops (9:00am – noon) June 2009
- Purpose:** The purpose of this training is to leverage Buzz Merrick's years of experience working with and teaching Microsoft products to provide the institutions employees with an awareness of and hands-on practice with essential skills and features of Microsoft 2007 Excel, Word, and Outlook. To help employees take advantage of the simple to learn and easy to use "power tools" each package has in order to substantially reduce the time, labor, and aggravation they now experience struggling with the 2007 Office Suite. We will also cover and promote the awareness and use of continuing education resources such as Skillsoft and Microsoft.com.
- Background:** This institution has identified a business need for their employees to increase their skills in Microsoft 2007 Excel, Outlook, Word, and to a lesser extent, PowerPoint. This hands-on workshop is targeted to providing a basic understanding of Office 2007 in general; how each package works and "thinks"; what happens when 2007 documents are shared with '03 users; and specific objectives listed below. Next steps are to design and agree upon the scope of effort and course objectives, develop the handout, and confirm the training date(s). Upon consideration of scope it is recommended that PowerPoint be left out of the mix at this time, but to point out where lessons learned in Word, & Excel are applicable in PowerPoint.
- Target Audience:** Employees of the academic institution who migrated to Office 2007.
- Proposed Dates:** Anytime after late May 2009 – after graduation
- Staff:** Contact person (xxx-xxx-xxxx) and Buzz Merrick (443-695-6341)
- Documentation/Handouts:** Mastering Microsoft 2007
 Appropriate Skillsoft Courses, Job Aids & Skill Briefs; Microsoft.com resources
 Workshop evaluation
- Upon completion of this workshop, users will be able to:**
- Utilize the features and functionality of Office 2007
 - Create a Table of Contents in Word
 - Use the Insert Cover Page feature in Word
 - Use Templates in Word and modify tables in Word
 - Use the Paintbrush in Word and Excel
 - Resize and modify the layout of graphics
 - Create and edit Pivot Tables and Pivot Charts in Excel
 - Create and use simple Macros in Excel
 - Create and use links in Excel and Word
 - Use the concatenation and identify duplicates formulas in Excel
 - Use the Text to Columns feature in Excel
 - Use the scheduling feature in Outlook
 - Create, assign, and modify tasks in Outlook
 - Use categories with calendar items in different ways in Outlook
 - Find Skillsoft and Microsoft learning resources
- Logistics:** Classes will be held from 9:00 am – 12:00 pm (noon) each day, with a 15 minute break, Total teaching time: 330 minutes. The institution agrees to provide copying for all handouts and to coordinate with their Information Technology Dept. to ensure Outlook can be taught using example (i.e., student) log ins. The institutions agrees to provide a list of applicable Skillsoft courses for Microsoft 2007.

Topics Day 1 (6/24)	Time	Minutes
Intro & What's New in Office 2007?	9:00 – 10:00	60
Excel Intro	10:00 – 10:15	15
Break	10:15 – 10:30	15
Excel Topics	10:30 – 11:40	70
Q&A	11:40 – noon	20
Total Time		180

Topics Day 2 (6/25)	Time	Minutes
Intro & Word Topics	9:00 – 10:15	75
Break	10:15 – 10:30	15
Outlook Topics	10:30 – 11:40	70
Q&A	11:40 – noon	20
Total Time		180

Revised Course Outline (sent after initial scope and discussion)

Topic	Time Estimate (minutes)
Introductions	5
What's New in Office 2007 (inc 4 minutes of MS Demo)	15
Overview of new and enhanced functionality (Smart Art, Mouse over tech, Office Button, Quick Access Toolbar, Tools Options,	5
Continued overview of new/enhanced features like auto calculate, auto filter, Pivot Tables, Cover Page, Templates, Preview Attachments in Outlook	10
Excel 2007	
Use Auto Filter and custom filters	15
Macros – how to “auto” format a PS report (format report + Print all)	10
Use Paintbrush for quick formatting	5
Create basic Pivot Tables	15
Edit/change pivot tables (include table auto-formatting choices)	15
Create and use Pivot Charts	10
Use the “Text to Columns” feature to split cells	10
Review the basics of Excel linking & link within a document for yr end	10
Link an Excel spreadsheet to a Word document	10
Use the “concatenation” function to join information from separate cells	10
Use the identify duplicates formula	10
Excel Tips n tricks (flex time for above)	10
Word 2007	
Generate a Table of Contents	20
Paintbrush Review	5
Insert and format a Word Table	10
Use the “Insert Cover Page” feature to create cover pages	10
Save an existing Report Cover to the “Insert Cover Page” gallery	5
Page numbers in different sections	10
Create a document using Word templates	5
How to work with graphics	10
Outlook 2007	
Understand and use scheduling feature	10
Create, assign, and modify tasks	10
Use categories with calendar items	10
Change calendar view to incorporate categories and duration	10
Copy/paste information into Excel	10
One 20 minute Q&A for each session	40
One 15 minutes break for each session	30
Total time	360

Cost:

Workshop fee of \$500/½ day	\$ 1,000	
One time course development fee (10 hours @100/hr)	\$ 1,000	(prep and handout development)
Total	\$ 2,000	
Repeats of this course will be at my normal fee structure, \$500 ½ day; \$800 full day (no prep fees)		