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Training Event Form

- Activity:** Computer Training, Administrative Documentation, Training Planning
- Duration:** Varies upon assignment
- Purpose:** The purpose of working with this organization is to assist with the update and dissemination of their policies and procedures manual; develop a technology training plan; and deliver Microsoft Office 2007 training. The Center would like to leverage the skills and experience Buzz Merrick has to meet these needs.
- Background:** The Counseling Center has identified a business need to:
- 1) Standardize, update, and improve the documentation of their policies and procedures manual to make it more user friendly and to increase use
 - 2) Assist approximately 25% of their workforce with acquiring basic/standard computer competency, skills, and comfort (sample topics: intro to pc's, the Internet, working in a network environment, email and Word basics)
 - 3) Develop a technology training plan for staff
 - 4) Provide technology training to the workforce
- Effort Summary:** The general outline of tasks will be to:
begin the effort to revise the policies and procedures manual by having Buzz Merrick work no more than 16 hours (2 full days) on the manual. We will then assess if any additional assistance is needed. The goal is to have the revised policies and procedures manual available for Quality Assurance (Q&A) review in May, for staff review in June, and to present to the Board of Directors in July.
- Buzz and the Center coordinator will meet to begin the process of developing an overall training plan which will incorporate an initial need to train specific individuals requiring basic computer literacy skills/comfort. Getting the workforce on "the same level playing field" with regards to personal computers is an essential first step in helping the workforce use better the tools they use every day. Once the training plan is approved, a timeline and action plan will be put into place. One of the objectives of Office 2007 training is to incorporate the Center's internal documents when possible. It is believed that using relevant documents in teaching how to use Word, Excel, PowerPoint and Outlook will result in a higher level of skill retention and effective use among the workforce at the same time as it teaches people how to effectively use the documents that are part of their every day business processes.
- Target Audience:** Faculty and Staff who have experience using Excel.
- Proposed Dates:** April – June 2009 to begin
- Staff:** Contact person xxx-xxx-xxxx; Buzz Merrick 443-695-6341
- Cost:** One half day training is \$500; full day training \$800; \$100/hour consulting
- Protocol:** Buzz will expand on this document as each section of the plan is developed and implemented and provide to Center contact for review and approval before continuing.

Course Outline for first ½ day class (1:00 – 4:00pm)

1. History of PC's and the Internet
2. What's New in Office 2007?
3. How to use the policies and procedures manual?
4. How to edit meeting notes?
5. How to type a new document and save?
6. How to copy/paste special from the Internet?
7. Outlook & Word

- 1 History
20 years ago, ten years ago, the pc, networks, WAN vs LAN, Internet
- 2 What's New – review, using Word, the Ribbon, Ofc button, templates, new document, saving, saving as, Send to, zoom, Quick Access Toolbar, demos showcase, interactive tool guide
- 3 How to use the policies and procedures manual – Open from network – navigate and print specific sections and pages
- 4 Use meeting notes template in Word – File Save as, select info and delete – leave 1st row with info. -
- 5 Type a little bit to show word wrap, review “save as” local and network
- 6 Go to the web and copy/paste special something from a known web site to show the difference between paste and “paste special” unformatted text
- 7 Open Outlook – review the basics; create new message and send, create new and edit with text colors, etc. Open new mail, sort mail, delete one and more, how to create folders; Tools, Mailbox Cleanup, Recycle Bin; Preview Attachments

Outlook demo:

<http://office.microsoft.com/en-us/outlook/HA100518161033.aspx>

Up to Speed with Word:

<http://office.microsoft.com/en-us/word/HA100484691033.aspx>