Skills Assessment for Microsoft Office

ESSENTIAL SKILLS FOR EMPLOYEES USING MICROSOFT 365

RedCape

Microsoft Productivity Workshop | Module 1

I. Essential Windows skills

Notes

- [ ] Get to your desktop with one keystroke
- [ ] Launch Windows Explorer with one keystroke
- [ ] Lock your computer with one keystroke
- [ ] Open your clipboard history with one keystroke
- [ ] Quickly split your screen with one keystroke
- [ ] Instantly launch a program
- [ ] Calculate meeting times across the globe in two clicks
- [ ] Instantly see what time it is in ten or more time zones

II. Essential skills across Microsoft Office

- [ ] Create a custom toolbar using the Quick Access Toolbar*
- [ ] Globally apply your corporate brand colors in one click*
- [ ] Globally apply your corporate fonts in one click*
- [ ] Brand your documents using Themes in one click*

III. Essential Microsoft Word skills to create and manage documents

- [ ] Tag paragraphs throughout your document with dynamic styles*
- [ ] Repeat last action using a keyboard shortcut
- [ ] Reformat your entire document in one click using style sets*
- [ ] Modify styles to globally update formatting**
- [ ] Create a table of contents in three clicks*
- [ ] Navigate your document in one click*
- [ ] Instantly move content using the navigation pane
- [ ] Upgrade legacy documents to styled documents

IV. Essential Microsoft Excel skills to manage data

- [ ] Quickly select your data with one keystroke*
- [ ] Instantly resize columns and rows in three clicks*
- [ ] Format a list as a Table to manage your data*
- [ ] Instantly expand table rows and columns*
- [ ] Create a calculated column with minimal effort*
- [ ] Get the headcount from an event list*
- [ ] Calculate how many people were invited to an event in one click*
- [ ] Calculate how many people have RSVP'd in one click*
- [ ] Fix bad formatting in one click*
- [ ] Use Flash Fill to separate, combine, and create columns of data*

V. Essential Microsoft PowerPoint skills to build a high-stakes deck

- [ ] Create presentations using your company-branded Theme
- [ ] Confidently assemble a unified deck from multiple presenters*
- [ ] Organize slides and structure your presentation with sections*
- [ ] Correctly use layouts to structure slide content*
- [ ] Instantly fix a problem slide using the magical Reset button
- [ ] Convert boring bullets to SmartArt in two clicks*
- [ ] Create an org chart in three clicks*

Microsoft Productivity Workshop — Module 2

VI. Essential Tips for Microsoft Outlook

- ☐ Instantly remove redundant messages*
- ☐ Ignore conversations without hurting anyone's feelings*
- ☐ Reply to an email with a meeting*
- ☐ Configure meeting times properly to eliminate time zone errors*
- ☐ Create one-click/one-tap links for mobile users
- ☐ Use @mentions to improve communication and save time*
- ☐ Resend a message without using the Forward command
- ☐ Remove all bad and inconsistent formatting with one click
- ☐ Quickly search for email using the powerful Search Bar*
- ☐ Configure default search features
- ☐ Create dynamic Search Folders to return to frequent searches*
- ☐ Use Quick Steps to automate multi-step processes*
- ☐ Automate standard responses using Quick Parts*

Microsoft Productivity Workshop — Module 3

VII. Essential Tips across Microsoft 365

- ☐ Understand the difference between OneDrive, Teams, and SharePoint
- ☐ Sync your Teams or SharePoint libraries to your laptop
- ☐ Sync Teams or SharePoint libraries to your OneDrive
- ☐ Know when to send a copy of or link to a document
- ☐ Confidently and securely send dynamic links to documents
- ☐ Back up your Desktop and Documents folders to OneDrive
- ☐ Add polls to your Teams meetings
- ☐ Find the best time to meet using FindTime
- ☐ Search across 365 to find information and files
- ☐ Share your expertise and find experts in your office
- ☐ Connect to a Microsoft list
- ☐ Sign and scan documents using your phone

* This skill meets an objective of a MOS certification exam

** This skill meets an objective of a MOS expert certification exam

The Plan

Step 1: Assess your skills using this checklist

Step 2: Attend the Microsoft Productivity Workshop (MPW) to fill in your knowledge gaps

Step 3: Turn hours of work into just a few clicks

www.redcapeco.com/mpw

"I couldn't believe how many items you showed that will make my job easier. I told my boss how great the class was. Now he is going to sign up." – Kim M.

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