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Technology Training and Consulting

SCG Training and Consulting Corporation

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2021 Technology Conference Speaking Topics

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Microsoft 365 New Features Update

DESCRIPTION

Improve your productivity using Microsoft 365 by learning: new feature enhancements; how the programs complement each other; and quicker techniques to get your work done. Microsoft 365 Enterprise offers a wide variety of apps in desktop, mobile, and online versions. This presentation will: 1) compare the versions and focus on new business features in the core apps: Excel, Word, and Outlook and 2) include an overview of OneDrive, OneNote, and Teams collaboration features.

PREREQUISITES: Basic knowledge Microsoft 365 apps
COURSE PRODUCER: SCG Training & Consulting Corporation
CREDITS: 2.0, 3.0, 4.0 (conference presentation as 2, 3 or 4 CPE hours)
ADVANCED PREPARATION: None
FIELD OF STUDY: Computer Software & Applications
DESIGNED FOR: CPAs and Professionals at all levels of an organization using Microsoft Office 365 who desire to learn new time-saving tips to improve productivity
COURSE LEVEL: Update

LEARNING OBJECTIVES

Upon completion of this course, participants will be able to:

- Utilize best practices and time-saving business tips in Excel, Outlook, Word, Teams, OneNote
- Explore new features and functions in Excel
- Use new features for business email, chat, posts, appointments, and meetings
- Create/edit/format business documents with ease in Word
- Create and share notes and other content using OneNote
- Apply team collaboration skills across the programs

MAJOR TOPICS

- Microsoft Outlook: new features, email best practices, scheduling, search, distribution groups, managing contact information, mailbox rules, user interface tips
- Microsoft 365 Teams overview: messaging, online meetings, audio and video calls, presence indicators, permissions
- Microsoft 365: Outlook and Teams feature interaction
- Microsoft Excel new features for data analysis and pivot table reporting
- Microsoft Excel new advanced functions
- Microsoft Word editing & formatting business documents, document review, document security
- Microsoft OneNote digital notetaking, sharing notebook content and collaboration, audio and video recording
- Microsoft OneDrive overview: document sharing and security features

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PowerPoint & Excel Data Visualization: Create Dynamic Financial Presentations, Charts, Graphs and Diagrams

DESCRIPTION

Most professionals are called upon to present information not only verbally but also with visual aids, handouts, and presentation software. Applying graphics to represent or enhance data can help you make a lasting impression on your audience. Whether you want to "wow" your audience and/or convey a serious message, this topic will give you many examples of how to enhance your presentations in PowerPoint and Excel. You can choose from the right pre-designed graphic, diagram, or template or build your own. Participants will learn many timesaving tips.

PREREQUISITES: Familiarity with PowerPoint and Excel
COURSE PRODUCER: SCG Training & Consulting Corporation
CREDITS: 2.0 (conference presentation as 2 CPE hours)
ADVANCED PREPARATION: None
FIELD OF STUDY: Computer Software & Applications
DESIGNED FOR: Business Leaders, Corporate Finance Teams, CPA Practitioner, CPAs, Financial Professionals
COURSE LEVEL: Update

LEARNING OBJECTIVES
Upon completion of this course, participants will be able to:
- Choose the best graphics for your topic and your audience
- Place and modify text, diagrams, and graphics in your presentation slides
- Add transition and animation when needed to control your presentation
- Incorporate presenter tips during a presentation and use presenter view
- Copy and link Excel and Word content to slides
- Create a presentation handout in Word and video handout in PowerPoint
- Create varieties of bar charts, pie charts, trendlines, combination graphs, and dual axis using new styles and graphics
- Use a variety of accessible formatting features to emphasize and customize parts of the data visualization
- Compare pie charts to sideways bar charts to emphasize ranking
- Add your customized charts to the chart templates as a user-defined entry for quick application to future charts
- Explore the chart variations of Sparklines and waterfall
- Take away many templates for after class use

MAJOR TOPICS

- Learn to focus the message of your presentation
- Learn important presenter tips for controlling the visual information during the presentation and delivering the presentation effectively (in-person, Teams, Zoom)
- Determine which graphics work best with your information
- Understand the impact of a variety of graphic symbols and colors
- Understand PowerPoint slide layouts, slide master controls, and slide background controls
- Apply Excel's color scales and icon sets to visually spot trends in data
- Add a secondary axis to present a breakout of multiple sets of data
- Add data tables to charts to quickly present the numeric values
- Learn how to present Excel PivotTable results in graphic form with Pivot Charts
- Learn how to incorporate Power BI graphics into slides
- Learn how to link data ranges or charts between Excel and Word and PowerPoint
- Learn when to use the Excel multiple axis feature for presenting various types of data
- Learn when to use a pie or bar chart to emphasize ranking
- Learn data selection techniques to populate the graphic elements
- Learn how to share your PowerPoint file
- Learn how to create effective handouts
- Learn how to convert your PowerPoint presentation into a video file

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Microsoft OneNote Digital Notetaking and Collaboration

DESCRIPTION
Explore OneNote features to improve time management skills including notetaking, researching, tracking task lists, co-authoring with Microsoft Teams, and collaboration with clients. OneNote can make it easier to collect and review lecture and meeting information with audio recording and search the audio recording for specific spoken words, phrases, and timing of notes. Research can be accomplished on the web and links are maintained so you know where you found the information. Excel content can be placed in notebook pages as well as tables and full documents. Documents printed to OneNote can be reviewed with handwriting features. This course will compare and contrast OneNote versions and show how to access notes across multiple devices. Attendees will receive practical information and tips.

DESIGNED FOR: Business Leaders, Corporate Finance Teams, CPA Practitioner, CPAs, Financial Professionals
FIELD OF STUDY: Computer Software & Applications
LEVEL: Update
PREREQUISITES: None
COURSE PRODUCER: SCG Training & Consulting Corporation
CREDITS: 1.0 or 2.0 (conference presentation as 1 or 2 CPE hours)

OBJECTIVES:
Develop digital note-taking skills, note collaboration skills, and note synchronizing skills with Microsoft OneNote that will allow you to: create and update notes; manage lists and outlines; search; add content including voice memos, pictures, and video; take notes in meetings; and interact with other Microsoft apps including Microsoft Teams.

HIGHLIGHTS:
* Explore the structure of a OneNote notebook * Add content to and organize your OneNote notebook including Excel spreadsheets, audio, video, files, internet browser screen captures * Use tags and search * Manage OneNote notebooks, history, and backups * Work with Excel spreadsheets and other embedded files * Share and collaborate with notebooks stored in OneDrive * Finalize pages and notebooks for printing or emailing * Share a notebook in a Microsoft Teams channel

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Microsoft Excel New Features Update: Data Analysis & Business Intelligence Power Tools

DESCRIPTION

Microsoft Excel users will benefit from understanding how they can use new data analysis features. This lecture/demonstration will cover new techniques to analyze data with functions, time-saving tips and business intelligence power tools added to Excel 365 including PowerPivot, Power Query and Power BI. The tips will help you, your team and your organization work more efficiently in Excel. Gain practical information for immediate use.

DESIGNED FOR: Business Leaders, Corporate Finance Teams, CPA Practitioner, CPAs, Financial Professionals
FIELD OF STUDY: Computer Software & Applications
LEVEL: Update
PREREQUISITES: None
COURSE PRODUCER: SCG Training & Consulting Corporation
CREDITS: 2.0 (conference presentation as 2 CPE hours)

OBJECTIVES:

▪ Obtain tips and how to use new automated features for cleaning up and reporting on data
▪ Explore pivot table features for quick data analysis using custom calculations, custom filters and pivot charts
▪ Discover the differences between the legacy pivot tables and new Power Pivot Data Model features
▪ Learn how to use the new Power Query to connect to data sources and modify data structure
▪ Obtain guidance on the new Power BI tools to create dynamic interactive reports and visualize data in charts and graphs

HIGHLIGHTS:

▪ Explore tips and new automated features for cleaning up and reporting on data that has been exported from other systems.
▪ Explore pivot table features for quick data analysis using custom calculations, custom filters, and pivot charts;
▪ Compare the legacy pivot tables with new Power Pivot features.
▪ Apply Power Query to connect to data sources and modify data structure.
▪ Use the new Power BI (Business Intelligence) tool to create dynamic interactive reports and visualize data in charts and graphs

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Microsoft Outlook Best Practices for CPAs and How Microsoft Outlook Interacts with Microsoft Teams

DESCRIPTION
Outlook is the software standard for client contact, meeting scheduling and sending and receiving business documents. Improving your Outlook skills might be one of your best time management investments. This course emphasizes features that will enhance productivity for tracking and managing client contact information, locating documents, searching, sharing team calendars, scheduling, and archiving client information. Interactivity with Microsoft Teams will also be covered.

PREREQUISITES: Basic knowledge of MS Outlook
COURSE PRODUCER: SCG Training & Consulting Corporation
CREDITS: 2.0 (conference presentation as 2 CPE hours)
ADVANCED PREPARATION: None
FIELD OF STUDY: Computer Software & Applications
DESIGNED FOR: Business Leaders, Corporate Finance Teams, CPA Practitioner, CPAs, Financial Professionals
COURSE LEVEL: Update

LEARNING OBJECTIVES
Upon completion of this course, participants will be able to:
- Use advanced searching to find client information quickly
- Interact between Outlook and Teams, Word, Excel, and OneNote
- Use features for group / team calendars, calendar sharing and permissions
- Schedule and manage meetings
- Set folder permissions, rules, add categories for contacts and tasks
- Import and export contact information
- Evaluate program option settings to suit the way you work
- Use intelligent grouping, conversation view, and rules

MAJOR TOPICS
- Learn tips to use the Outlook user interface reading pane, navigation pane, calendar peek, multiple windows, and the To Do Bar
- Create and manage subfolders and favorites
- Set email options and rules to prioritize and process incoming or outgoing email
- Arrange email by conversation subject line
- Use flags for follow up

- Compare Outlook desktop, web, and mobile
- Set up accounts to receive email from multiple internet accounts
- Set "Out of Office" replies and rules
- Understand archive folders
- Use color categories to prioritize in email, contacts, or tasks
- Use Instant Search to locate email from any folder or archive
- Use contact forms for creating, sharing, and tracking interaction with clients
- Apply task views and categories
- Use time-saving tips for entering and displaying appointments
- Share calendars and group overlay schedules
- Set permissions to delegate maintenance of Outlook folders
- Set desktop alerts for incoming information
- Send email to and from Microsoft Teams
- Schedule meetings, forward meeting requests, and tally responses
- Schedule virtual Teams audio/video meetings
- Understand the use of the calendar in Teams and the channel calendar
- Understand similarities and differences of Outlook meetings and Teams meetings
- Use time-saving keyboard shortcuts for reading email
- Use new time-saving ribbon tools
- Learn guidelines and tips to tame your Inbox

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Microsoft Teams: How it Works for Effective Communication and Collaboration

DESCRIPTION

It's time to learn Microsoft Teams usage and best practices, increase your technology collaboration skills, and understand how Outlook and Teams work together. Understanding Team roles, security, meetings, presenter tips, file upload and sharing with SharePoint online, @mentions, chat, public and private channels, tabs, and apps will enhance your daily work productivity.

PREREQUISITES: Familiarity with Microsoft 365
COURSE PRODUCER: SCG Training & Consulting Corporation
CREDITS: 2.0 or 3.0 (conference presentation as 2 or 3 CPE hours)
ADVANCED PREPARATION: None
FIELD OF STUDY: Computer Software & Applications
DESIGNED FOR: Anyone in an organization who wants to improve their technology communication and collaboration skills.
COURSE LEVEL: Update

LEARNING OBJECTIVES

Upon completion of this course, participants will be able to:
- Use specific features to enhance team collaboration including @mentions, chat, public and private channels, tabs, and apps
- Use Teams and Outlook integration features
- Utilize team roles, security, and guest access
- Upload files and share with SharePoint online
- Schedule and present virtual audio/video meetings

This presentation applies to the Windows version of Microsoft 365 Teams.

MAJOR TOPICS
Collaborating with Teams
- Overview of Microsoft Teams – User Interface in detail
- Converse and Share in Teams – Converse, post creation, @mentions, save options, file discovery and sharing, profile, settings
- Activity feed – View, sort, filter, settings
- Follow channels and people
- Meet in Teams – Meeting scheduling, persistent meeting history, work while meeting, initiate a call, share your desktop, create recording, leave the meeting
- Collaborate with Office 365 Apps and Teams – co-author documents in Teams, email integration, command box, search

Configuring Teams

- Configure Teams – Configure and override presence, manage your messaging contacts, configure tabs in Teams, Team creation, access, roles, management
- Channels and Tabs – Channel types, adding channel tabs for apps and files

Interacting with Outlook

- Learn Outlook user interface changes and best practices related to Teams
- Identify Calendar interactivity
- Send email to a Team channel
- Set and override Presence indicator
- Learn new Teams interactivity in Outlook on the web vs. Outlook Desktop