

Windows, Word, Excel and Lotus Notes Skills Requirements

The following is a list of features in Microsoft Windows, Word, and Excel that all firm members should know how to use.

Windows

Using Windows Help

The Windows Start Button

Launching applications from shortcuts: file associations concept

Using the Mouse: drag & drop, right mouse functions

Using Windows explorer

 Navigating with Explorer: Address bar features

 Working in a Window: scroll, title bar, resize, minimize, maximize, close button

 Managing Multiple Windows: Task bar

 Creating folders

 Copy, cut, move, and paste files and folders

 Deleting folders

 Renaming files and folders

 Using long file names

 Changing folder views

 Using the Explorer “Find Files” features

Creating a shortcut on the Desktop

Arranging desktop Icons

Changing display properties

Using the Recycle Bin

Using the Windows Briefcase features

Using the Printer Settings Features

 Selecting a printer

 Changing the default printer

Word

 Basic topics

 Saving information

 Inserting

 Dates

 Fields

 Symbols

 Inserting Images

 Printing

 Using Undo and Redo

 Using the Mouse: drag & drop, right mouse functions

 File management

 Saving files

 Creating new folders

 Long file name usage for MS Office applications

 Renaming files

 Special documents

 Envelopes

 Labels

 Form Forms and Templates

 Keyboard & Mouse shortcuts

 Text justification

 Right

 Left

 Centered

Text formatting

New files

Open files

Saving files

Printing

Cut / Copy / Paste

Drag & Drop

Selecting Text

Shift / ctrl keys in conjunction with cursor movement keys

Ctrl + A

Mouse += shift / ctrl keys

Formatting Text

Font

Font size

Text justification

Tabs

Indents

Hanging indents

Change case

Spell Check

Find & Replace

General Word Processing Tips

Keep it simple

Do not use too many fonts / sizes (ransom note style)

Always insert path in document

Always spell check

Advanced Topics

Macros

Recording

Adding to tool bar

Headers / footers

Tables

- Creating
- Headings
- Revisions
- Adding rows and columns
- Sorting
- Formatting
- Tool bar modification
- Grammar check
- Sending files via email
 - Sending
 - Saving a received file
 - Routing slips for MS Mail applications
- Advanced file search

Excel

Basic topics

- Tool bar modification
- Basic formulas
 - Sum
 - Including "complex" selection of sum criteria
 - Payment
 - Average
 - Round
 - Referencing formula components to other cells / worksheets
- Selecting cells
 - Ctrl with point and click
 - Shift with point and click
 - Shift with cursor movement keys
 - Column selection
 - Row selection
- Re-sizing columns
- Copying / moving
- Using Undo and Redo

Using the Mouse: drag & drop, right mouse functions

Printing

Selecting print range

Header and footer controls

Print to fit options

Print preview

Saving information

Formatting Cells

Cell text justification

Centering text across columns

Fonts

Underlining

Spreadsheet tips and basics

Advanced Topics

Graphs

Work sheets

Macros

Recording

Adding to toolbar

Advanced formulas

String formulas

If formulas

Lotus Notes

Email

Creating a mail message

Deleting mail messages

Responding to a mail message

Forwarding a mail message (with history and without)

Moving mail messages to a folder

Previewing mail messages (using the preview pane)

Creating a file attachment

Accept/Decline a meeting invitation

Calendar

Create a calendar entry

Meetings

Appointment

All Day Event

Anniversary

Reminder

Reschedule/Cancel/Confirm – Calendar item (if the user is the owner)

Decline/Delegate/Propose New Time – Calendar item (if the user is the recipient)

Assign Notification times to calendar entries

Schedule a meeting and invite others

View other user's calendars if given rights (using group calendars)

Delete a calendar entry

Move a calendar entry (or a series of entries) from one day to another

Change a calendar view (1 month, 2 week, 5 day etc.)

To Do List

Create a new To Do item

Delete a To Do item

Set Priorities and Types on To Do items

Mark a To Do item complete

Copy a To Do item into calendar or mail entry

Address Book

Create a contact

Delete a contact

Create a group / add contact to group

Search for a contact

General Items

Change "Locations"

Set "Out of Office" agent

Change user preferences

Includes allowing others to view mail, calendar and To Do items

Change letterhead and signature text

Add bookmarks on bookmark bar

User icon bar

Search views using quick search (type in a view)

Search using search bar (full index search)

Replication (notebook users)

Start the replication process

Stop the replication process

Choose which databases are to be replicated (check the databases on the replication page)

Advanced Skills

Schedule replication

Mail file archiving

Customize Icon Bar