This document describes the workshop series designed for staff to enhance their skills in using Microsoft and Adobe software or web-based apps for professional development program for OMSE staff, to support UA COM faculty in the medical education programs.

OMSE Support for Office Staff Workshop Series

Enhancing Office Skills

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OMSE SOS Workshop Series - Description

Advanced Skills in Office Software

Structure: Each workshop will be two-hours and will offer demonstrations of how to use the programs or applications to support staff productivity in the medical education program. Each workshop will provide opportunities for staff to collaborate with peers as well as practice in how to use advanced features of programs regularly used by OSME staff to enhance the support they provide to UA COM faculty.

SOS Series Goals:

- To enhance professional office skills of OMSE staff and medical education program coordinators;

- Create an archive of supportive, multi-media materials for training new and existing staff;

- Encourage staff in sharing what they learn with other staff and faculty.

Timeline: Workshops will be offered at least once per month over a 12 month period, more often when scheduling allows.

Workshop Topics

There are several workshop topics. Within each topic there are listed examples of programs or web-based applications that would be addressed. Each workshop is 2 hours and may not offer enough time to cover all the programs or applications in each topic category. As needed, OMSE FID will add workshop dates/times to address the needs of OMSE staff.

1. Document Preparation and Publication Tools

    1.1. Microsoft Word

    1.2. Microsoft Publisher

    1.3. Microsoft PowerPoint

    1.4. Microsoft One Note

    1.5. Adobe Pro

2. Graphic Tools

    2.1. Microsoft Visio (PowerPoint)

    2.2. Adobe InDesign

3. Data Management

    3.1. Microsoft Excel

    3.2. Microsoft Access (data management)

4. Organization & Project Management Tools

    4.1. Microsoft Outlook (organization & communications management)

    4.2. Microsoft Project (project management)

    4.3. Microsoft Access (project management)

5. File Sharing Tools

    5.1. Dropbox (www.dropbox.com) (storage and file sharing cloud system)

    5.2. Box.net (www.box.com) (HIPAA approved, storage and file sharing cloud system)

6. Web-based Apps

    6.1. Mail Chimp – electronic newsletters and distribution campaigns

    6.2. Devices: iPad & iPhone as project management and document preparation tools

    6.3. In-house software: ThinkShare (formerly GroupShare) (for Block Coordinators)

A note about SOS Workshops

The Support for Office Skills (SOS) workshop series is not a certified skills program, such as is offered by The University of Arizona through its professional development courses in information technology and the IT Academy for Microsoft Products as part of its software licensing benefits (see Related Resources below). The SOS workshop series is aimed at assisting OMSE staff as well as clerkship and elective/selective coordinators in further developing skills in using office applications, such as Word, Excel, Project, Visio, and PowerPoint and Adobe Pro, in ways targeted to support the medical education program. Some workshops may offer opportunities to learn new software. The primary facilitator for these workshops will be Karen Spear Ellinwood, PhD, JD, OMSE Faculty instructional development. AHSC BioCommunications staff may provide additional assistance or source materials.

SOS Workshop No. 1

Topic: Expanding how we use Microsoft Word - Using it to the max!

Duration: 2 hours

Facilitator: Karen Spear Ellinwood, PhD, JD, EdS

Description

This workshop is organized around the most likely to be used productivity functions of Microsoft Word and Publisher. Workshop participant knowledge will determine where we will focus. The first hour of the workshop will address MS Word features and the 2nd hour will address MS Publisher features and the interface of these document preparation and publication tools with other applications or web-based services, such as Adobe and Scribd.com.

1st Hour: Using MS Word Menu Tabs to the Max!

Document

- Create cover pages
- Modify document styles, headings and special formatting (creating and modifying)
- *Templates*: Create templates or modify text styles and assign to templates

Formatting & Reference Tools

- *Reference*
  - Create auto-numbered footnotes and endnotes
  - Generate table of contents, document index, table of figures
  - Style marking: Mark text for inclusion in table of contents or citations or index
  - Mark entries for inclusion in table of references (citations)
  - Create reference library and manage citation styles
- *Page Layout*
  - Page numbering & sections, how do I force page 1 to start after the 1st page?
  - Using Quick Parts, auto text, document properties and Fields

Insert...
- External files
- Objects, movies, images

- Special symbols (including accent marks)

Multi-person Editing
- Insert, edit and review comments
- How to use "Track Changes"
- Compare document revisions

Insert Tables
- Create elegant tables (header rows; special columns; text format and graphic display; sorting; formulas; properties (auto fit; text distribution; row & column distribution)
- Create template table styles

Insert Graphics with Captions
- Graphics
  - Create or edit charts
  - SmartArt – should I use PowerPoint or Word to create it?
  - Saving SmartArt or other graphics as Png, jpg, bmp?

- Inserting Screenshots? Which software should I use?
- Resize graphics without losing proportion
- Captions
  - Add and edit captions to figures and tables
  - Auto-numbering
- **Forms**: Developer Mode to create forms

2nd Hour: Interface with other applications & services

Interfacing with …

- MS OneNote (screenshot functionality)
- Converting Word docs to PDF (protecting the integrity of documents; publishing online)
- Creating hyperlinks to audio, visual or other virtual materials
- Publication to Scribd.com or other hosting services

Materials

Participants will receive a guide to assist them in practicing these skills at work.

SOS Workshop Series No. 2

Topic: Stylizing documents with MS Publisher

When: Thursday, March 20, 2014 - 9:00am

Where: COM-3116 (multimedia room near lecture halls, third floor)

Duration: 2 hours

Facilitator: Karen Spear Ellinwood, PhD, JD, EdS

Description

This workshop is organized around the most likely to be used productivity functions of Microsoft Publisher's main menu identified below. If workshop participants would like to learn other functions not listed here, please let the facilitator know in advance so she can prepare to address your questions. Thank you.

- **Overview**: Purposes for using MS Publisher (instead of MS Word)
  - Comparing to Word
    - Which features do Word and Publisher have in common? Are they used in the same way?
    - How is it different from Word?
- **Templates: Creating templates for repeated use**

- **Page Design**
  - Customizing backgrounds, styles, fonts, color
  - Snapping objects to the grid
  - Using guides
- **Document Outputs**
  - Publisher format
  - Converting to PDF
  - Publishing to Scribd.com hosting services
- **Interactive Documents**
  - Creating hyperlinks to audio, visual or other virtual materials

Materials

Participants will receive a guide to assist them in practicing these skills at work.

SOS Workshop No. 3

Making the Most of Microsoft PowerPoint

When: Thursday, April 3, 2014 - 9:00am

Where: COM-3114 (multimedia room near lecture halls, third floor)

Duration: 2 Hours

Facilitator: Karen Spear Ellinwood, PhD, JD, EdS

Description

Building your PowerPoint presentation

- Hyperlinks & Programming "actions": Creating or modifying
- Comments: How to create and use
- Inserting AV objects: audio & video files, charts (adding, modifying with Excel; graphics from Visio)
- Building & Modifying Smart Art – using in other applications, saving as jpg's or png's
- Creating/inserting photo albums and clipart
- Slide layouts: Set up; orientation; using; modifying o Structure: When and how to use "Sections"
- Design: How to choose the right design (color, fonts, effects; background styles); quick styles

Slideshow presentation features

- Showing/hiding slides
- Animations (entry & exit; timing; duration; auto/click play)
- Page transitions
- Rehearsing timings
- Incorporating audio narration
- Presenter view v. presentation view
- Setting resolution for monitors
- Broadcasting presentations (Windows Live ID)

Interfacing PowerPoint & Visio with other applications:

- Visio
- OneNote
- Adobe (PDF conversion)
- Poll Everywhere
- Mobile App: Haiku Deck

Materials

Participants will receive a guide to assist them in practicing these skills at work.

SOS Workshop No. 4

When: Thursday, April 24, 2014 - 9:00am

Where: MDL-3116 (Media lab, third floor, College of Medicine near lecture halls)

Using MS Visio Pro 2013 to Create Awesome Graphics

Duration: 2 Hours

Facilitator: Karen Spear Ellinwood, PhD, JD, EdS

Description

This workshop introduces participants to basic functionality of the Microsoft Visio Pro 2013 program. The software is covered by a UA Site License for UA faculty and staff. You may download the software by clicking here. Please consult UA ITS for AHSC colleges for assistance in installing it on your work computer.

Selecting project type

- Organization charts

- Office layouts

- Program manuals/guides

- Cross-functional flow charts

- Basic flowcharts

- Work flow diagrams

- Concept charts

Customize your own documents

- Creating

- Adding pages to create multi-page documents

- Creating templates to suit your purposes

- Design types & colors

Getting Graphic

- *Symbols, Shapes & Icons*

  - Locating & inserting graphic categories

  - Stylizing & resizing

  - Moving

  - Arranging layers

- *Freestyle* Drawing with Ink Tools

  - Highlighter

  - Pen

  - Eraser

  - Pointer

  - Customizing drawing tools

Presentation Mode

OMSE SOS Workshop Series - Description

Document outputs

- Exporting/Saving as graphics (.jpg, .png)

- Saving as Visio Drawing

- Saving as PDF - multi-page documents (.pdf)

Interactive documents

- Creating hyperlink among pages within same document

Materials

Participants will receive a guide to assist them in practicing these skills at work.

Related Resources

Download Visio

SOS Workshop No. 5

Interfacing Data & Project Management Tools: Excel

When**:** Thursday, May 15, 2014 - 9:00am

Where**:** MDL-3116 (Media lab, third floor COM near lecture halls)

Duration: 2 Hours

Facilitator: Karen Spear Ellinwood, PhD, JD, EdS

Description

Discover Excel options

- Setup: Page setup; printing set up; naming worksheets; File nomenclature

- Import data from other programs (Access, text, older version of Excel, SPSS, from web)

- Views – Efficiencies of particular views

- Creating hyperlinks to external websites

- Attaching hyperlinks to pages or individual objects

Interfacing with...

- MS OneNote

  - MS PowerPoint
  - MS Excel

- Using the Comment feature

- Organize data: when to use multiple spreadsheets, how to use formatting

Table formatting
- Why use table formatting? (sorting data)

- How does it help manage the data?

Cell Formatting
- For data types
- In response to data
- Customizing the style of cells
- Insert hyperlinks to cells

Create charts
- Generate charts from data
- Modifying Chart Type or Style
- Moving charts
- Exporting charts as graphics
- Modifying data or Selecting different data after chart is generated

Data analysis
- Creating/using formulas for data crunching
- Sorting data
- Trace precedent (which cells affect value of selected cell)

Materials

Participants will receive a guide to assist them in practicing these skills at work.

- Trace dependents (identify cell affected by selected cell)
- Error checking; formula evaluation

Choosing the right file type
- When to save as Excel workbook .xls vs. .xlsx;
- When you might want to use file extensions such as .csv or tab delimited or txt

Store data: password protection
Print Options & Generating reports
Interface with other office software
- MS Access vs. Excel
- MS PowerPoint (e.g., selecting/modifying data after exporting chart to PowerPoint)
- MS OneNote ("note taking" & creating notebooks)

SOS Workshop No. 6

Using Adobe Pro: Document Conversion, Portfolio Prep, Creating Forms & More

When: Thursday, June 5, 2014 - 9:00am

Where: MDL-3116 (medial lab, third floor COM, near lecture halls)

Duration: 2 Hours

Facilitator: Karen Spear Ellinwood, PhD, JD, EdS

Description

This workshop provides an overview of the basic functionality in Adobe Pro identified below.

Create PDFs & Portfolios

- Generate basic portable document format (PDF) documents from office documents (print; save as)

- Combining existing PDFs into a single document or package

- Create Portfolios with hyperlinks to external documents or sites

Edit PDFs

- Touch-up text editing tool

- Touch-up object editor

- Add new text: Use the Typewriter

- Insert external documents

- Delete or crop pages

Create & Track FORMS!

- Create forms

- Distribute

- Online submissions

- Data collection and management

Comments

- Create and format comments

- Use markup tools

- Modify styles (format and color; presentation/display)

Indexing: Create bookmarks (automatically and manually) as navigable table of contents

Formatting

- Add Headers or Footers

- Insert date/time stamps

Document Properties

- Create meta data

- Limit access or permissions to document (edit/add document properties)

- Settings for how documents will open on other computers

- Security features & settings

- Display and program preferences

Special features

- Find versus Search

- Read out loud

- Shared review and editing features

- Creating and using certified signatures

- Create searchable documents & OCR text recognition

Materials

Participants will receive a guide to assist them in practicing these skills at work.

SOS Workshop No. 7 – Web-based Applications

Creating Visually Appealing Electronic Newsletters & Email Campaigns

Duration: 2 Hours

Facilitator: Karen Spear Ellinwood, PhD, JD, EdS

Description

- Create & Import subscriber (distribution) lists

- Create electronic newsletters using MailChimp Templates

- Create your own templates

- Publish "campaigns"

- Create Subscriber Forms to embed on your website

- Track subscriber activity

Materials

Participants will receive a guide to assist them in practicing these skills at work.