

# TRAINING MANUAL

FOR

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# **About Manual**

Staff Training Continue writing few lines about this training manual like how this manual will be beneficial for staff to improve their services. Continue writing few lines about this training manual like how this manual will be beneficial for staff to improve their services. Continue writing few

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Training Manual Template

# **Training Manual Formats**

**RJ Alexander** 

#### **Training Manual Formats:**

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Workbooks Auditing Worksheets 1 Auditing Worksheets 2 Tracing Precedent and Dependent Cells 3 Tracing Errors 4 Error Checking 5 Using the Watch Window 6 Cell Validation Outlining Worksheets 1 Using Outlines 2 Applying and Removing Outlines 3 Applying Subtotals Consolidating Worksheets 1 Consolidating Data Tables 1 Creating a Table 2 Adding an Editing Records 3 Inserting Records and Fields 4 Deleting Records and Fields Sorting Data 1 Sorting Data 2 Custom Sort Orders Filtering Data 1 Using AutoFilters 2 Using the Top 10 AutoFilter 3 Using a Custom AutoFilter 4 Creating Advanced Filters 5 Applying Multiple Criteria 6 Using Complex Criteria 7 Copying Filter Results to a New Location 8 Using Database Functions Using What If Analysis 1 Using Data Tables 2 Using Scenario Manager 3 Using Goal Seek 4 Forecast Sheets Table Related Functions 1 The Hlookup and Vlookup Functions 2 Using the IF AND and OR Functions 3 The IFS Function Sparklines 1 Inserting and Deleting Sparklines 2 Modifying Sparklines Creating Charts In Excel 1 Creating Charts 2 Selecting Charts and Chart Elements 3 Adding Chart Elements 4 Moving and Resizing Charts 5 Changing the Chart Type 6 Changing the Data Range 7 Switching Column and Row Data 8 Choosing a Chart Layout 9 Choosing a Chart Style 10 Changing Color Schemes 11 Printing Charts 12 Deleting Charts Formatting Charts in Excel 1 Formatting Chart Objects 2 Inserting Objects into a Chart 3 Formatting Axes 4 Formatting Axis Titles 5 Formatting a Chart Title 6 Formatting Data Labels 7 Formatting a Data Table 8 Formatting Error Bars 9 Formatting Gridlines 10 Formatting a Legend 11 Formatting Drop and High Low Lines 12 Formatting Trendlines 13 Formatting Up Down Bars 14 Formatting the Chart and Plot Areas 15 Naming Charts 16 Applying Shape Styles 17 Applying WordArt Styles 18 Saving Custom Chart Templates Data Models 1 Creating a Data Model from External Relational Data 2 Creating a Data Model from Excel Tables 3 Enabling Legacy Data Connections 4 Relating Tables in a Data Model 5 Managing a Data Model PivotTables and PivotCharts 1 Creating Recommended PivotTables 2 Manually Creating a PivotTable 3 Creating a PivotChart 4 Manipulating a PivotTable or PivotChart 5 Changing Calculated Value Fields 6 Formatting PivotTables 7 Formatting PivotCharts 8 Setting PivotTable Options 9 Sorting and Filtering Using Field Headers PowerPivot 1 Starting PowerPivot 2 Managing the Data Model 3 Calculated Columns and Fields 4 Measures 5 Creating KPIs 6 Creating and Managing Perspectives 7 PowerPivot PivotTables and PivotCharts 3D Maps 1 Enabling 3D Maps 2 Creating a New 3D Maps Tour 3 Editing a 3D Maps Tour 4 Managing Layers in a 3D Maps Tour 5 Filtering Layers 6 Setting Layer Options 7 Managing Scenes 8 Custom 3D Maps 9 Custom Regions 10 World Map Options 11 Inserting 3D Map Objects 12 Previewing a Scene 13 Playing a 3D Maps Tour 14 Creating a Video of a 3D Maps Tour 15 3D Maps Options Slicers and Timelines 1 Inserting and Deleting Slicers 2 Modifying Slicers 3 Inserting and Deleting Timelines 4 Modifying Timelines Security Features 1 Unlocking Cells 2 Worksheet Protection 3 Workbook Protection 4 Password Protecting Excel Files Making Macros 1 Recording Macros 2 Running and Deleting Recorded Macros 3 The Personal Macro Workbook Using Online Templates 1 Downloading Online Templates 2 Saving a Template 3 Creating New Workbooks from Saved Templates Legal Templates 1 Chapter Overview 2 Using the Law Firm Financial Analysis Worksheet 3 Using the Law Firm Project Tracker 4

Using the Law Firm Project Plan Legal Business Functions 1 The Pv Function 2 The Fv Function 3 The IRR and XIRR Functions Simple IOLTA Management 1 IOLTA Basics 2 Using Excel for Simple IOLTA Management 3 Using the Simple Crystal Reports Training Manual Classroom in a Book TeachUcomp ,2013-10-27 Complete **IOLTA** Template classroom training manuals for Crystal Reports Two manuals Introductory and Advanced in one book 226 pages and 118 individual topics Includes practice exercises and keyboard shortcuts You will learn all about how to establish data connections create complex and detailed reports advanced charting techniques and much more Topics Covered The Crystal Reports Environment 1 Starting Crystal Reports 2 The Menu Bar 3 Using Toolbars 4 The Design View Creating Data Connections 1 Creating a New Blank Report 2 The Database Expert 3 Access Excel DAO 4 ADO NET XML 5 Database Files 6 Java Beans Connectivity 7 JDBC JNDI 8 ODBC RDO 9 OLAP 10 OLE DB ADO 11 Salesforce com 12 SAP BW MDX Query 13 SAP Info Sets 14 SAP Operational Data Source 15 SAP Table Cluster or Function 16 Universes 17 XML and Web Services 18 Repository 19 More Data Sources 20 Selecting Report Data and Tables 21 The Data Explorer Creating Basic Reports 1 Adding Data Fields to a Report 2 Browsing Field Data 3 Selecting Moving and Resizing Fields 4 Using the Size and Align Commands 5 Creating Text Objects 6 Saving a Report 7 Previewing a Report 8 Refreshing the Report Data Linking Tables in a Report 1 Basic Table Structures and Terms 2 Linking Multiple Tables 3 Table Joins 4 Enforcing Table Joins and Changing Link Types Basic Formatting Techniques 1 Formatting Report Objects 2 The Common Tab of the Format Editor 3 The Number Tab of the Format Editor 4 The Font Tab of the Format Editor 5 The Border Tab of the Format Editor 6 The Date and Time Tab of the Format Editor 7 The Paragraph Tab of the Format Editor 8 The Picture Tab of the Format Editor 9 The Boolean Tab of the Format Editor 10 The Hyperlink Tab of the Format Editor 11 The Subreport Tab of the Format Editor 12 Drawing Lines 13 Drawing Boxes 14 Format Painter 15 Formatting Part of a Text Object 16 The Template Expert 17 Inserting Pictures Record Selection 1 The Select Expert 2 Setting Multiple Filters 3 Editing the Selection Formula Sorting and Grouping Records 1 The Record Sort Expert 2 The Group Expert 3 Managing Groups 4 Summarizing Groups 5 Hierarchical Groupings 6 The Group Sort Expert Printing Reports 1 Inserting Special Fields 2 Page Setup 3 Printing Reports Using Formulas 1 Crystal Reports Formula Syntax 2 The Formula Workshop Formula Editor Window 3 Creating Formula Fields 4 Crystal Syntax 5 Basic Syntax 6 Finding Function and Operator Assistance Advanced Formatting 1 The Highlighting Expert 2 The Section Expert 3 Conditionally Formatting a Section 4 Conditionally Formatting a Field 5 Manipulating Multiple Sections Summary Reports 1 Summarizing Report Data 2 Using the DrillDownGroupLevel Feature Charting 1 The Chart Expert 2 Editing Charts 3 Setting General Chart Options 4 Formatting Selected Chart Items 5 Formatting a Data Series 6 Formatting Chart Gridlines 7 Setting Chart Axes Options 8 Adding Chart Trendlines 9 Modifying a 3D Chart View 10 Using Chart Templates 11 Auto Arranging Charts Advanced Reporting Tools 1 Using Running Totals 2 Creating Parameter Fields 3 Parameterized Record Selection 4 Creating Subreports 5 Report Alerts 6 Report Alert Functions Advanced Formula Creation

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Themes 2 Customizing Theme Colors 3 Customizing Theme Fonts 4 Changing Theme Effects 5 Customizing Theme Background Styles Applying Animation 1 Adding Slide Transition Animation 2 Adding Object Animation 3 Animating Multimedia Playback Slide Shows 1 Start a Slide Show 2 Slide Show Pointer Options 3 Using Custom Shows 4 Set Up Show 5 Record a Slide Show 6 Rehearsing Timings 7 Subtitles in a Slide Show 8 Save a Slide Show as a Video 9 Save as Show 10 Publish to Stream 11 Hide a Slide in a Slide Show 12 Rehearse with Coach Zooms Links and Actions 1 Using Zooms 2 Using Links 3 Using Actions Printing Your Presentation 1 Changing Slide Size 2 Setting the Slide Header and Footer 3 Previewing and Printing Presentations 4 Check Accessibility 5 Create a PDF Document Using Presentation Masters 1 Using Slide Masters and Slide Layouts 2 Using the Notes Master 3 Using the Handout Master 4 Saving a Presentation Template Helping Yourself 1 Using PowerPoint Help 2 The Tell Me Bar and Microsoft Search PowerPoint Options and Export Options 1 Setting PowerPoint Options 2 Creating an Animated GIF 3 Package a Presentation for CD 4 Exporting Handouts to Word

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the Inbox 3 2 Changing the Inbox View 3 3 Message Flags 3 4 Searching for Messages 3 5 Creating Addressing and Sending Messages 3 6 Checking Message Spelling 3 7 Setting Message Options 3 8 Formatting Messages 3 9 Using Signatures 3 10 Replying to Messages 3 11 Forwarding Messages 3 12 Sending Attachments 3 13 Opening Attachments 3 14 Ignoring Conversations CHAPTER 4 THE SENT ITEMS FOLDER 4 1 The Sent Items Folder 4 2 Resending Messages 4 3 Recalling Messages CHAPTER 5 The Outbox Folder 5 1 Using the Outbox 5 2 Using the Drafts Folder CHAPTER 6 USING THE CALENDAR 6 1 The Calendar Window 6 2 Switching the Calendar View 6 3 Navigating the Calendar 6 4 Appointments Meetings and Events 6.5 Manipulating Calendar Objects 6.6 Setting an Appointment 6.7 Scheduling a Meeting 6.8 Checking Meeting Attendance Status 6 9 Responding to Meeting Requests 6 10 Scheduling an Event 6 11 Setting Recurrence 6 12 Printing the Calendar 6 13 Teams Meetings in Outlook 6 14 Meeting Notes CHAPTER 7 Tasks 7 1 Using Tasks 7 2 Printing Tasks 7 3 Creating a Task 7 4 Setting Task Recurrence 7 5 Creating a Task Request 7 6 Responding to Task Requests 7 7 Sending Status Reports 7 8 Deleting Tasks CHAPTER 8 Deleted Items 8 1 The Deleted Items Folder 8 2 Permanently Deleting Items 8 3 Recovering Deleted Items 8 4 Recovering and Purging Permanently Deleted Items CHAPTER 9 GROUPS 9 1 Accessing Groups 9 2 Creating a New Group 9 3 Adding Members to Groups and Inviting Others 9 4 Contributing to Groups 9 5 Managing Files in Groups 9 6 Accessing the Group Calendar and Notebook 9 7 Following and Stop Following Groups 9 8 Leaving Groups 9 9 Editing Managing and Deleting Groups CHAPTER 10 The Journal Folder 10 1 The Journal Folder 10 2 Switching the Journal View 10 3 Recording Journal Items 10 4 Opening Journal Entries and Documents 10 5 Deleting Journal Items CHAPTER 11 Public Folders 11 1 Creating Public Folders 11 2 Setting Permissions 11 3 Folder Rules 11 4 Copying Public Folders CHAPTER 12 Personal Private Folders 12 1 Creating a Personal Folder 12 2 Setting AutoArchiving for Folders 12 3 Creating Private Folders 12 4 Creating Search Folders 12 5 One Click Archiving CHAPTER 13 Notes 13 1 Creating and Using Notes CHAPTER 14 Advanced Mailbox Options 14 1 Creating Mailbox Rules 14 2 Creating Custom Mailbox Views 14 3 Handling Junk Mail 14 4 Color Categorizing 14 5 Advanced Find 14 6 Mailbox Cleanup CHAPTER 15 OUTLOOK OPTIONS 15 1 Using Shortcuts 15 2 Adding Additional Profiles 15 3 Adding Accounts 15 4 Outlook Options 15 5 Using Outlook Help CHAPTER 16 DELEGATES 16 1 Creating a Delegate 16 2 Acting as a Delegate 16 3 Deleting Delegates CHAPTER 17 SECURITY 17 1 Types of Email Encryption in Outlook 17 2 Sending Encrypted Email Microsoft Teams 2020 Training Manual Classroom in a Book TeachUcomp ,2020-10-19 Complete classroom training manual for Microsoft Teams 2020 101 pages and 51 individual topics Includes practice exercises and keyboard shortcuts You will learn how to create and manage teams channels and users setup and attend meetings make calls create live events and much more Topics Covered Getting Acquainted with Teams 1 The Teams Environment 2 Viewing and Managing the Activity Feed 3 Customizing Settings 4 Setting Your Status and Creating Status Messages Setting Up Teams and Channels 1 Overview of Teams and Channels 2 Creating Teams and Adding Members 3 Ordering Editing Hiding and Deleting Teams 4 Managing Teams and Members 5

Creating Channels 6 Renaming Deleting Hiding Showing and Pinning Channels 7 Sending Email to an Entire Channel Posts and Messages 1 Creating and Formatting Posts 2 Making an Announcement 3 Getting Attention with Mentions 4 Posting to Multiple Channels at Once 5 Using Tags 6 Editing and Deleting Posts and Messages 7 Reading and Saving Posts and Messages File Sharing and Collaboration 1 Uploading and Sharing Files 2 Syncing SharePoint and Teams Files 3 Collaborating on Files in Channels Chats and Calls 1 Starting and Pinning Chats 2 Filtering Hiding and Muting Chats 3 Creating Contacts and Contact Groups 4 Adding People to Your Speed Dial List 5 Making Video and Audio Calls 6 Answering Calls and Using the Meeting Controls Toolbar 7 Configuring Call Answer Rules and Voicemail 8 Checking Call History and Voicemail 9 Setting Up a Delegate to Take Your Calls Meetings 1 Scheduling a Meeting and Inviting Attendees 2 Using Meet Now for Instant Meetings 3 Meeting Options 4 Managing and Replying to Meetings 5 Starting and Joining a Meeting 6 Changing the Video Background in a Meeting 7 Sharing Your Screen in a Meeting 8 Sharing PowerPoint Slides in a Meeting 9 Recording a Meeting 10 Raising Hands Spotlighting Muting and Removing Participants 11 Taking Notes in Meeting 12 Using Live Captions in Meetings 13 Ending a Meeting for Everyone in Attendance Live Events 1 Scheduling a Live Event 2 Producing a Live Event 3 Moderating a Live Event 4 Attending a Live Event Exploring Apps and Tools 1 Using Apps Bots and Connectors 2 Turing a File into a Tab 3 Using the Wiki Tab for Shared Information 4 Using the Command Box Acrobat DC Training Manual Classroom in a Book TeachUcomp ,2019-10-27 Complete classroom training manual for Adobe Acrobat DC 315 pages and 163 individual topics Includes practice exercises and keyboard shortcuts Professionally developed and sold all over the world these materials are provided in full color PDF format with not for profit reprinting rights and offer clear concise and easy to use instructions You will learn PDF creation advanced PDF settings exporting and rearranging PDFs collaboration creating forms document security and much more Topics Covered Getting Acquainted with Acrobat 1 Introduction to Adobe Acrobat Pro and PDFs 2 The Acrobat Environment 3 The Acrobat Home View 4 The Acrobat Tools View 5 The Acrobat Document View 6 The Menu Bar 7 Toolbars in Acrobat 8 The Common Tools Toolbar 9 Customizing the Common Tools Toolbar 10 Customizing the Quick Tools Toolbar 11 The Page Controls Toolbar 12 Resetting All Customizable Toolbars 13 Showing and Hiding All Toolbars and the Menu Bar 14 The Navigation Pane 15 The Tools Center 16 Customizing the Tools Pane Opening and Viewing PDFs 1 Opening PDFs 2 Selecting and Copying Text and Graphics 3 Rotating Pages 4 Changing the Viewing Options 5 Using the Zoom Tools 6 Reviewing Preferences 7 Finding Words and Phrases 8 Searching a PDF and Using the Search Pane 9 Sharing PDFs by Email 10 Sharing PDFs with Adobe Send and Track Creating PDFs 1 Creating New PDFs 2 Creating PDFs from a File 3 Creating PDFs from Multiple Files 4 Creating Multiple PDF Files at Once 5 Creating PDFs from Scanned Documents 6 Creating PDFs Using the PDF Printer 7 Creating PDFs from Web Pages Using a Browser 8 Creating PDFs from Web Pages Using Acrobat 9 Creating PDFs from the Clipboard 10 Creating PDFs Using Microsoft Office 11 Creating PDFs in Excel PowerPoint and Word 12 Creating PDFs in Adobe Applications 13 Creating PDFs

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Customization 3 Performing Additional Customization 4 The Layout Designer 5 Changing the Grid and Margins in the Layout Designer 6 Selecting Objects in the Layout Designer 7 Moving and Resizing Objects in the Layout Designer 8 Formatting Objects in the Layout Designer 9 Copying Objects and Formatting in the Layout Designer 10 Adding and Removing Objects in the Layout Designer 11 Aligning and Stacking Objects in the Layout Designer 12 Resizing Columns in the Layout Designer Estimating 1 Creating a Job 2 Creating an Estimate 3 Duplicating Estimates 4 Invoicing From Estimates 5 Updating Job Statuses 6 Inactivating Estimates 7 Making Purchases for a Job 8 Invoicing for Job Costs 9 Using Job Reports Time Tracking 1 Tracking Time and Printing a Blank Timesheet 2 Weekly Timesheets 3 Time Enter Single Activity 4 Invoicing from Time Data 5 Using Time Reports 6 Tracking Vehicle Mileage 7 Charging Customers for Mileage Payroll 1 The Payroll Process 2 Creating Payroll Items 3 Setting Employee Defaults 4 Setting Up Employee Payroll Information 5 Creating Payroll Schedules 6 Creating Scheduled Paychecks 7 Creating Unscheduled Paychecks 8 Creating Termination Paychecks 9 Voiding Paychecks 10 Tracking Your Tax Liabilities 11 Paying Your Payroll Tax Liabilities 12 Adjusting Payroll Liabilities 13 Entering Liability Refund Checks 14 Process Payroll Forms 15 Tracking Workers Compensation Using Credit Card Accounts 1 Creating Credit Card Accounts 2 Entering Credit Card Charges 3 Reconciling and Paying Credit Cards Assets and Liabilities 1 Assets and Liabilities 2 Creating and Using an Other Current Asset Account 3 Removing Value from Other Current Asset Accounts 4 Creating Fixed Asset Accounts 5 Creating Liability Accounts 6 Setting the Original Cost of Fixed Assets 7 Tracking Depreciation 8 The Loan Manager 9 The Fixed Asset Item List Equity Accounts 1 Equity Accounts 2 Recording an Owner s Draw 3 Recording a Capital Investment Writing Letters With QuickBooks 1 Using the Letters and Envelopes Wizard 2 Editing Letter Templates Company Management 1 Viewing Your Company Information 2 Setting Up Budgets 3 Using the To Do List 4 Using Reminders and Setting Preferences 5 Making General Journal Entries 6 Using the Cash Flow Projector 7 Using Payment Reminders 8 Receipt Management Using QuickBooks Tools 1 Company File Cleanup 2 Exporting and Importing List Data Using IIF Files 3 Advanced Importing of Excel Data 4 Updating QuickBooks 5 Using the Calculator 6 Using the Portable Company Files 7 Using the Calendar 8 The Income Tracker 9 The Bill Tracker 10 The Lead Center 11 Moving QuickBooks Desktop Using the Migrator Tool Using the Accountant's Review 1 Creating an Accountant's Copy 2 Transferring an Accountant's Copy 3 Importing Accountant's 4 Removing Restrictions Using the Help Menu 1 Using Help Creating a Legal Company File 1 Making a Legal Company Using Express Start 2 Making a Legal Company Using the EasyStep Interview 3 Reviewing the Default Chart of Accounts 4 Entering Vendors 5 Entering Clients and Cases 6 Enabling Class Tracking for Law Firms 7 Creating Billing Line Items Setting up a Trust Account 1 What is an IOLTA 2 Creating Accounts for Trust Management 3 Creating Items for Trust Management Managing a Trust Account 1 Depositing Client Money into the Client Trust Account 2 Entering Bills to Pay from the Trust Account 3 Recording Bills for Office Expenses 4 Paying Bills from the Client Trust Account 5 Using a Client Trust Credit Card 6 Time Tracking and Invoicing for Legal Professionals 7 Paying the

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