

# Council Mastery Series Information

Extended = 9 sessions – 90 mins

Jump ins = 6 sessions – 60 mins

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## 1. Terms & Conditions for Participating in the CloudyIT Council Mastery Series Webinars:

### **Session Costs:**

- Attendance is free for CloudyIT customers. Non-CloudyIT customers are charged £40 per attendee.

### **Invoice and Payment:**

*Upon signing up for a session, an invoice will be raised, requiring immediate payment.*

### **Cancellation Policy:**

*If you wish to cancel your registration, a minimum of 24 hours' notice is required to be eligible for a refund.*

*Please note: A CloudyIT customer is defined as a customer with an active service, including Microsoft 365, Support, Decisions, Apps, or Finance.*

### **Microsoft 365 Subscription Requirement:**

*Whilst it's beneficial to have a Microsoft 365 subscription to fully engage in our sessions, it's not a compulsory requirement. Should you not have a subscription, CloudyIT is ready to assist. Feel free to get in touch to explore licensing alternatives.*

### **Dual Screen Set-Up Recommendation:**

*To enhance your learning experience, we advise joining our webinars with two screens available — one to watch the trainer and another to follow along. If you don't have access to two monitors, using two separate devices is a viable alternative.*

### **Arrival Recommendation:**

*We recommend joining the session at least 5 minutes before the scheduled start time to ensure your equipment is working properly and avoid delays.*

### **Length**

*All 15 sessions will be scheduled for every other month*

- 9 Extended Sessions = 90 mins
- 6 Jump ins = 60 mins

## 2. Extended: File Freedom in M365

**First Date:** 1<sup>st</sup> July

**Time:** 10:00 AM – 11:30 AM

**Format:** Extended Live Webinar + Q&A

### **Overview:**

Are you feeling overwhelmed by digital clutter? This session focuses on beginners who want a simple, friendly approach to file management. Alternatively, you may be a professional who wants to stay productive and in control.

We understand every organisation will have different ways of working, but it is everyone's responsibility to take control of their files and follow document management principles. This session aims to ensure we all are working as efficiently and effectively as possible.

Remember there is no **i** in Teams

### **Key Topics:**

- Understanding your new digital landscape
- Lifecycle of a document in SharePoint
- Local v Cloud Storage - what is the difference
- Creating a Folder Structure that works for you
- Naming conventions that saves you time
- Tagging, searching and finding files fast
- Emailing attachments a thing of past
- Sharing and Managing
- Showing a files version history
- Making files available offline
- Managing your data in SharePoint

### **Who Should Attend:**

For those who struggle to find all their files, you may be fearful of being overwhelmed by technical jargon. You need just clear, practical help in understanding your new digital landscape.

### **Pricing:**

- **Free for CloudyIT customers.**
- **£40 for non-CloudyIT customers (read T&Cs).**

### **Continue Your Digital Learning Journey:**

Complete your training with Unlocking Microsoft 365: A Friendly Guide to Getting Started **webinar**, to explore what added benefits by making the most of Teams to transform the way you collaborate

### 3. Extended: Introduction to Teams

**First Date:** 8<sup>th</sup> July

**Time:** 11:30 PM – 1:00 PM

**Format:** Live Webinar + Q&A

**Overview:**

This session is the perfect place to begin your journey with Microsoft Teams. Discovering the benefits for collaboration. Designed for new users of Microsoft Teams or anyone looking to build confidence in using Teams for communication, collaboration, and productivity.

**Key Topics:**

- Exploring the benefits of Microsoft 365
- How to access your account and exploring the new Copilot dashboard
- Running productive virtual meetings and recordings
- Setting up Teams for effective communication using chat and conversations
- Managing channels and files for collaboration
- Integrating Teams with Microsoft 365 tools

**Who Should Attend:**

Whether you're a remote worker or office-based employee, or part of a hybrid team, this course will help you get comfortable with the basics and start using Teams effectively from day.

**Pricing:**

- **Free for CloudyIT customers.**
- **£40 for non-CloudyIT customers (read T&Cs).**

**Continue Your Digital Learning Journey:**

See how Teams integrates with tools like Planner, Bookings, Forms, OneNote, Loop provide on our 60 minutes jump-ins session.

## 4. Extended: Teams for Mastering Virtual Collaboration

**First Date:** 5<sup>TH</sup> August 2025

**Time:** 11:30 PM – 1:00 PM      **Format:** Live Webinar + Q&A

### **Overview:**

Making the most of Teams, it focuses on helping delegates go beyond the basics and unlock the platform's potential.

### **Key Topics: - 10 key steps:**

1.    **Mastering Channels & Tabs**  
How to organize conversations, files, and apps within Teams and channels effectively.
2.    **Chat Like a Pro**  
Tips for using chat features smartly: formatting, reactions, @mentions, and message threads.
3.    **Meetings & Scheduling**  
Best practices for scheduling, running, and following up on Teams meetings — including using the calendar, meeting notes, and recordings.
4.    **Collaborating on Files**  
Real-time co-authoring in Word, Excel, and PowerPoint, plus version control and sharing tips.
5.    **Using Teams with Outlook**  
How Teams integrates with Outlook for seamless communication and scheduling.
6.    **Customising Notifications**  
Managing alerts and notifications to stay informed without being overwhelmed.
7.    **Leveraging Apps & Integrations**  
Adding apps like Planner, OneNote, Forms, Loops to enhance productivity.
8.    **Search & Command Bar Tips**  
Using the search bar and slash commands to quickly find messages, files, and people.
9.    **Mobile App Tips**  
How to stay productive on the go with the Teams mobile app.
10.   **Etiquette & Best Practices**  
Guidelines for effective communication, channel naming, file organisation, and digital collaboration.

### **Who Should Attend:**

This course is for all Microsoft Teams users — whether you're a team member, manager, or support staff and want to get more out of the platform and improve how you work with others. Teams will transform the way you collaborate.

### **Pricing:**

- **Free for CloudyIT customers.**
- **£40 for non-CloudyIT customers (read T&Cs).**

### **Continue Your Digital Learning Journey:**

You now understand what apps can do now **Unlock the Full Power of Apps in Just One Hour** by attending our 1 hour jump-ins on Planner, Forms, OneNote, Booking and Loop

## 5. Extended: Outlook for Email Efficiency & Time Management

**First Date:** 17<sup>th</sup> July 2025

**Time:** 11:30 PM – 1:00 PM

**Format:** Live Webinar + Q&A

### **Overview:**

This session equips you with tips and tricks to streamline email handling and time management in Microsoft Outlook. Improve your productivity and communication while keeping council operations on track. An interact session for all to share their frustrations and quick wins.

### **Key Topics:**

- Email Etiquette
- Key differences between Classic and New Outlook
- Inbox management techniques and categorisation
- Setting up and sharing calendars for meetings
- Automating repetitive tasks with Quick Steps and Rules.
- Integrating Outlook with Teams and other Microsoft 365 tools

### **Who Should Attend:**

Councillors, clerks, and administrators handling council communications. Those that feel email and managing meetings is consuming their day. This session is led by its attendees.

### **Pricing:**

- **Free for CloudyIT customers.**
- **£40 for non-CloudyIT customers (read T&Cs).**

### **Continue Your Digital Learning Journey:**

Combine what you've learned with insights from our **1-hour Jump-ins** which explore how Outlook integrates with other apps and tools like Teams and SharePoint, Loop, Planner, Bookings and Forms to create seamless workflows.

## 6. Extended: Excel Essentials – Time to Excel

**First Date:** 10<sup>th</sup> July 2025

**Time:** 11:30 PM – 1:00 PM

**Format:** Live Webinar + Q&A

### **Overview:**

Improve your confidence by being more proficient when using Excel. Do you get by with what you know but feel could do so much more? Do you feel there must be a quicker way to undertake your tasks? then this session is for you.

This course lays down the foundations required to ensure you can progress with ease to more advanced sessions on Excel. Take your first steps on your journey to Excelling.

### **Key Topics:**

- Tips and tricks
- Understanding the correct formats and why formulas go wrong
- Understanding the Law of Maths (BODMAS), absolute and relative formulas a must when working with calculations
- Making your data work for you by applying essential functions, sorting, filtering, applying custom filters, removing duplicates, applying colours to data that meet your criteria
- Displaying data in charts and sparklines (mini charts)
- Displaying your data to ensure you achieve the hidden gems of Excel
- Preparing your spreadsheet for printing

### **Who Should Attend:**

For those you need to save **time** when working with spreadsheets. Council staff, clerks, and anyone managing data or reports as part of their role.

### **Pricing:**

- **Free for CloudyIT customers.**
- **£40 for non-CloudyIT customers (read T&Cs).**

### **Continue Your Digital Learning Journey:**

Now you have the necessary core skills then world is your lobster so continue your journey by attending by attending the Excel Intermediate session – you will be **Excelling**.

## 7. Extended: Excel Intermediate - Excelling

**First Date:** 26<sup>th</sup> August 2025

**Time:** 11:00 PM – 12:30 PM

**Format:** Live Webinar + Q&A

### Overview:

As part of our **Council Mastery Series Deep Dive Sessions**, this webinar focuses on unlocking the full potential of Microsoft Excel to improve council data management and analytical capabilities. Learn how to organise data, create meaningful reports, and apply advanced formulas to support informed decision-making. Designed to ensure you work SMARTER rather than HARDER.

### Key Topics:

- Data Validation to ensure data accuracy.
- Making the most of advanced filtering and conditional formatting
- Applying subtotals
- Pivot Tables, Charts, Timeline, Slicers to create a dashboard
- Examining Functions for:
  - LOOKUP's, TEXT, SUMIFS, COUNTIFS, AVERAGEIFS, MATH&TRIG, STATISCIAL,
  - DATE&TIME, IF ERROR and Nested Functions.
- Why formulas go wrong.

### Who Should Attend:

Ideal for those who attended the Excel Essentials 'Time to Excel' course as this is a fast-paced course, although it will take the direction from its attendees.

For Council staff, clerks, and anyone managing data or reports as part of their role.

### Pricing:

- **Free for CloudyIT customers.**
- **£40 for non-CloudyIT customers (read T&Cs).**

### Continue Your Digital Learning Journey:

Combine what you've learned with insights from our **1-hour Jump-ins** which explore how Outlook integrates with other apps and tools like Teams and SharePoint, Loop, Planner, Bookings and Forms to create seamless workflows.

## 8. Extended Word Essentials – have you heard the WORD

**First Date:** 30<sup>th</sup> July 2040

**Time:** 11:30 PM – 1:00 PM

**Format:** Live Webinar + Q&A

### **Overview:**

Have you heard the **Word!** To improve your confidence by being more proficient when using Word. Do you get by with what you know but feel there could be a quicker way and do so much more? Do you feel **Word** behaves badly at times? then this course is for you.

This session lays down the foundations required to ensure you can progress towards advanced features, it provides some excellent tips and tricks when creating documents tailored to council operations. This session takes the direction from its attendees and an opportunity to share your frustrations and wins.

### **Key Topics:**

- **Paragraph Formatting including:**
  - Spacing, Indenting, Tabs for left, right, left, centre, decimal and leaders, Format painter, Numbering and Bullets, Find and Replace advantage features.
- **Page Layout options:**
  - Margins, orientation, newspaper columns, page and section breaks, headers and footers, changing page numbers for different first page, docid's.
- **Word Settings:**
  - Tailoring, AutoFormat, AutoCorrect, AutoText, Toolbars, Language, Accessibility, Spelling, Thesaurus, Repairing, Importing
- **Creating and Working with Tables:**
  - Create Minutes, understand why rows and pictures jump over to another page, use of AutoSum, Merging, Split Cells, Repeating Heading, Adding Tabs, Convert text to a table/table to text
- Repairing a Word document
- Exporting as a PDF

### **Who Should Attend:**

Clerks, administrators, and staff responsible for preparing council documents. Beneficial if you are self-taught, this session takes the direction from its attendees and guarantees you will be working SMARTER rather than HARDER.

### **Pricing:**

- **Free for CloudyIT customers.**
- **£40 for non-CloudyIT customers (read T&Cs).**

### **Continue Your Digital Learning Journey:**

Take your skills further in our **Word Intermediate** to enhance your documents, understanding the power of using styles, especially when creating multi-level numbering.

## 9. Extended: Word Intermediate – Beyond the Basics

**First Date:** 28<sup>th</sup> August 2025

**Time:** 11:30 PM – 1:00 PM

**Format:** Live Webinar + Q&A

### **Overview:**

Do you get frustration when using outline numbering i.e. 1., 1.1,1.1.1? Do you get by with what you know but feel could do so much more? Do you feel there must be a quicker way of what you are trying to achieve? Do you wonder why text and tables jump over to another page? If your answer is YES this course is for you.

To eliminate the frustration of Word and numbering and understand why it goes wrong. Providing time-saving techniques to ensure Word works with you rather than against you. This session will improve your confidence by being proficient when using Word

### **Key Topics:**

- Automatic Numbering using Styles, easily promote/demote
- Applying a Table of Contents, Table of Figures, Index
- Bookmarks and Cross-referencing
- Viewing Options to collapse and extend and easily rearrange your paragraphs and numbering reflects this move
- Side by Side and Synchronise Scrolling
- Using templates and styles for document and numbering consistency
- AutoCorrect, AutoFormat, Autotext
- Importing, Linking and embedding Excel tables/Charts
- Exporting as PDF's
- Repairing
- Inserting files
- Designing polished meeting minutes and reports.

### **Who Should Attend:**

Ideal for those who attended the Word Essentials 'Have you heard the Word' course as this is a fast-paced course, although it will take the direction from its attendees.

For Council staff, clerks, and anyone managing reports, minutes or large documents as part of their role.

### **Pricing:**

- **Free for CloudyIT customers.**
- **£40 for non-CloudyIT customers (read T&Cs).**

### **Continue Your Digital Learning Journey:**

Combine what you've learned with insights from our **1-hour Jump-ins** which explore how Outlook integrates with other apps and tools like Teams and SharePoint, Loop, Planner, Bookings and Forms to create seamless workflows.

## 10. Jump ins: Unlocking Microsoft 365: A Friendly Guide to Getting Started

**First Date:** 22<sup>nd</sup> July

**Time:** 12:00 PM – 1:00 PM

**Format:** Live Webinar + Q&A

### **Overview:**

This session is your easy entry point into the world of Microsoft 365. It provides a tour of the features of M365, providing an insight into the core applications and their essential functionalities, empowering you to step into this new digital landscape.

### **Key Topics:**

- Introduction to core Microsoft 365 applications
- Accessing your M365 account and exploring the new AI dashboard
- Collaborating and sharing with OneDrive and Team files

### **Who Should Attend:**

Councillors, clerks, and council staff new to Microsoft 365 or looking to strengthen their foundational understanding in a pace that is set by its attendees. For those who are feeling lost after moving to Microsoft 365 and maybe overwhelmed by technical jargon.

### **Pricing:**

- **Free for CloudyIT customers.**
- **£40 for non-CloudyIT customers (read T&Cs).**

### **Continue Your Digital Learning Journey:**

Complete your training with File Freedom in M365, for those who are feeling overwhelmed by digital clutter and finding their files.

See how Teams integrates with tools like Planner, Bookings, Forms, OneNote, Loop provided on our 60 minutes jump-ins session.

## 11. Jump-ins: PowerPoint for Professional Presentations made Simple

**First Date:** 3<sup>rd</sup> July 2025

**Time:** 12:00 PM – 1:00 PM

**Format:** Live Webinar + Q&A

### Overview:

Join this **Session** to learn how to create impactful and engaging PowerPoint presentations, perfect for sharing council initiatives and projects with stakeholders.

### Key Topics:

- Designing slides for clarity and visual appeal
  - Convert text to SmartArt
  - Working with Shapes
  - Inserting Links
- Adding animations and transitions to enhance communication.
  - Rehearse with Coach
  - Subtitles
  - Insert Cameo
- Structuring and enhancing presentations for council meetings
  - Adding Speaker Notes
  - Prepare for handouts
  - Using Slide Masters and Templates
  - Adding customised 3D Models
  - Linking to Excel
  - Inserting Video and Audio
- Best practices for sharing and delivering presentations.
  - Record Narration
  - Create a Video

### Who Should Attend:

Council staff and members delivering presentations to colleagues or the public.

### Pricing:

- **Free for CloudyIT customers.**
- **£40 for non-CloudyIT customers (read T&Cs).**

### Continue Your Digital Learning Journey:

Combine what you've learned with insights from our **1-hour Jump-ins** which explore how Outlook integrates with other apps and tools like Teams and SharePoint, Loop, Planner, Bookings and Forms to create seamless workflows.

## 12. Jump-ins: Loop for Advanced Collaboration

**First Date:** 12<sup>th</sup> August 2025

**Time:** 12:00 PM – 1:00 PM

**Format:** Live Webinar + Q&A

### **Overview:**

**Unlock the Full Power of Loop in Just One Hour** - Join our expert-led Loop training webinar and discover how to make the most of every feature this powerful platform has to offer. You will gain practical insights, tips, and real-world use cases to help you collaborate more effectively, streamline workflows, and stay organised. Whether you're new to Loop or looking to sharpen your skills, this session is designed to get you up to speed—fast.

### **Key Topics:**

- What is Loop?
- Creating and choosing content in a Workspace.
- Using components and pages to collaborate.
- Embedding Loop in other Microsoft 365 tools.

### **Who Should Attend:**

Council staff, clerks, and anyone needing to collaborate across departments as part of their role. Perfect for busy professionals who want maximum impact with minimal time commitment.

### **Pricing:**

- **Free for CloudyIT customers.**
- **£40 for non-CloudyIT customers (read T&Cs).**

### **Continue Your Digital Learning Journey:**

Combine what you've learned with insights from our other **1-hour Jump-ins** explore how Outlook integrates with other apps and tools like Teams, Planner, OneNote, Bookings and Forms to create seamless workflows.

## 13. Jump-ins: Bookings for Simplified Appointment Scheduling

**First Date:** 14<sup>th</sup> August 2025

**Time:** 12:00 PM – 1:00 PM

**Format:** Live Webinar + Q&A

### Overview:

**Unlock the Full Power of Bookings in Just One Hour** - Microsoft Bookings as a powerful tool for streamlining appointment scheduling across various council services. Whether you're managing staff appointments, venue reservations, or event bookings (like Christmas market stalls), this session will provide practical guidance on how to set up and automate your booking processes, saving time and improving public interactions.

### Key Topics:

- Setting up and customising a Microsoft Bookings page for different council services.
- Managing staff availability and setting appointment rules.
- Creating separate booking systems for venues (e.g., council halls and meeting rooms).
- Using Bookings for community events, such as Christmas market stall reservations.
- Automating confirmations, reminders, and cancellations to reduce administrative workload.

### Who Should Attend:

Clerks, administrators, and council staff responsible for scheduling public-facing services, managing venues, or organising events.

### Pricing:

- **Free for CloudyIT customers.**
- **£40 for non-CloudyIT customers (read T&Cs).**

### Continue Your Digital Learning Journey:

Combine what you've learned with insights from our other **1-hour Jump-ins** explore how Outlook integrates with other apps and tools like Teams and SharePoint, Planner, Loop and Forms to create seamless workflows.

## 14. Jump-ins: Planner for Collaborative Task Management

**First Date:** 24th July

**Time:** 12:00 PM – 1:00 PM (time to be changed on website states 11:30 – 1:00 )

**Format:** Live Webinar + Q&A

### **Overview:**

**Unlock the Full Power of Planner in Just One Hour** - This webinar focuses on using Microsoft Planner to organise council projects and tasks efficiently, fostering collaboration across departments.

### **Key Topics:**

- Setting up Planner task boards for team coordination.
- Assigning tasks and tracking deadlines.
- Monitoring project progress and maintaining accountability.
- Integrating Planner with Teams for streamlined collaboration.

### **Who Should Attend:**

Councillors, clerks, and project managers handling council initiatives.

### **Pricing:**

- **Free for CloudyIT customers.**
- **£40 for non-CloudyIT customers (read T&Cs).**

### **Continue Your Digital Learning Journey:**

Combine what you've learned with insights from our other **1-hour Jump-ins** explore how Outlook integrates with other apps and tools like Teams, Loop, OneNote, Bookings and Forms to create seamless workflows.

## 15. Jump-ins: Forms for Creating Interactive Surveys & Polls

**First Date:** 15<sup>th</sup> July

**Time:** 12:00 PM – 1:00 PM

**Format:** Live Webinar + Q&A

### **Overview:**

**Unlock the Full Power of Forms in Just One Hour** - This webinar focuses on using Microsoft Forms to organise council projects and tasks efficiently, fostering collaboration across departments.

Explores how to design interactive surveys and polls using Microsoft Forms. Gather valuable feedback from the community and stakeholders to enhance council decision-making.

### **Key Topics:**

- Creating and customising surveys and polls.
- Analysing responses with built-in reporting tools.
- Sharing forms and embedding them into council communications.
- Practical examples for council use.

### **Who Should Attend:**

Councillors and staff collecting input from stakeholders or the community.

### **Pricing:**

- **Free for CloudyIT customers.**
- **£40 for non-CloudyIT customers (read T&Cs).**

### **Continue Your Digital Learning Journey:**

Combine what you've learned with insights from our other **1-hour Jump-ins** explore how Outlook integrates with other apps and tools like Teams, Loop, OneNote, Bookings and Planner to create seamless workflows.

## 16. Jump-ins: OneNote for Streamlining Notes and Meeting Integration

**First Date:** 7<sup>th</sup> August

**Time:** 12:00 PM – 1:00 PM

**Format:** Live Webinar + Q&A

### Overview:

**Unlock the Full Power of OneNote in Just One Hour** - This webinar focuses on using Microsoft OneNote to improve how councils manage meeting notes, organise information, and track action points. Learn how to use OneNote for structured note-taking, sharing, and collaboration, ensuring key information is always at hand.

### Key Topics:

- Creating and organising notebooks, sections, and pages
- Using tags to track tasks, priorities, and follow-ups
- Integrating OneNote with Outlook for seamless meeting preparation and follow-up
- Collaborating on shared notebooks in real time

### Who Should Attend:

Council clerks, administrators, and staff who regularly take meeting notes and need an efficient way to manage and share information.

### Pricing:

- **Free for CloudyIT customers.**
- **£40 for non-CloudyIT customers (read T&Cs).**

### Continue Your Digital Learning Journey:

Combine what you've learned with insights from our other **1-hour Jump-ins** explore how Outlook integrates with other apps and tools like Teams, Loop, Forms, Bookings and Planner to create seamless workflows.