

Common
Occupational
Readiness
Essentials

CERTIFICATION PREP
Microsoft
Outlook
2013

D. Michael Floor



Certification Prep Series

by D. Michael Floor

*Start on Monday.
Test on Friday.*

Certification Prep Series consists of individual guides that provide practice in the basic skills needed to be successful using the corresponding software. No previous software experience is required. Although the guides focus on learning skills, not test taking, users that complete the practice will be prepared to take the official software certification exam and exhibit workplace readiness. Step-by-step instructions demonstrate actual software commands and features, building from basic to advanced. Content is divided into small units for better learning and usage. There is no need to purchase additional materials as all lesson content is created using the software.

- Provides an affordable way to prepare for industry certification versus other methods.
- Integrates easily into existing classroom activities.
- Focuses on hands-on experience to develop skills.

Microsoft Office Products

- Microsoft Word 2013
- Microsoft Excel 2013
- Microsoft PowerPoint 2013
- Microsoft Outlook 2013
- Microsoft Access 2013
- Microsoft Word 2010
- Microsoft Excel 2010
- Microsoft PowerPoint 2010
- Microsoft Outlook 2010
- Microsoft Access 2010

Adobe Products

- Adobe Photoshop CS6
- Adobe Dreamweaver CS6
- Adobe Flash CS6
- Adobe Photoshop CS5
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- Adobe Flash CS5



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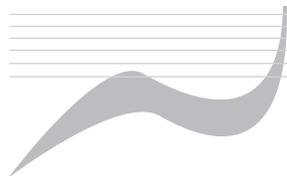
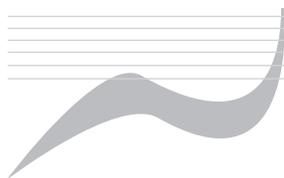


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Introduction

The Common Occupational Readiness Essentials (CORE) series of certification preparation guides focuses on mastering the essential basic skills needed as a workplace-ready user of the software. The goal of each CORE certification preparation guide is to provide practice in each essential basic skill required by employers who use the software. To prove workplace readiness, you will also be prepared to take the official certification exam for the software.

CORE Microsoft Outlook 2013 will help prepare you to take the Microsoft Office Specialist (MOS) Microsoft Outlook 2013 certification exam. It provides step-by-step instruction for the features and commands covered on the certification exam. The focus of the lessons is to practice *using* the actual commands and features instead of creating a complete end product. All lesson content is created using the software. The only files that need to be downloaded are for the certification simulation at the end of this guide. Furthermore, each certification preparation guide is broken down into small learning units to enable better comprehension and application of the software. Where required, answers are provided at the back of the certification preparation guide.

Certification as a Microsoft Office Specialist demonstrates an aptitude with Microsoft Office software. MOS certification is offered for Microsoft Word, Microsoft Excel, Microsoft PowerPoint, Microsoft Outlook, Microsoft Access, Microsoft SharePoint, and Microsoft OneNote. Certification exams are provided by Certiport, Inc., through various testing facilities. Visit www.certiport.com for more information on registering for certification exams.

About the Author

D. Michael Ploor is the author of the CORE series of certification preparation guides. Mr. Ploor's students have achieved exceptional results with the CORE certification preparation guides. His students collectively pass more than 500 industry certification exams each year without the need for other preparation materials. Mr. Ploor has demonstrated the strength of integrating the CORE guides in a diverse mix of courses.

Mr. Ploor is also the author of three textbooks on the subject of video game design: *Introduction to Video Game Design*, *Video Game Design Foundations*, and *Video Game Design Composition*. He is a National Board Certified Teacher in Career and Technical Education and holds an MBA degree from the University of South Florida. He maintains professional teaching credentials in Business Education and Education Media Specialist.

Mr. Ploor is at the forefront of innovative teaching and curriculum. He developed STEM curriculum while serving as the lead teacher in the Career Academy of Computer Game Design at Middleton Magnet STEM High School. Mr. Ploor has applied his skills as a STEM Curriculum Integration Specialist in designing innovative curriculum and by collaborating to construct the state standards for video game design in several states. He has also been instrumental in authoring competitive events for Career and Technical Student Organizations such as the Future Business Leaders of America (FBLA) and Phi Beta Lambda (PBL).

In addition to publishing textbooks and lessons, Mr. Ploor provides professional development as a frequent presenter at regional and national conferences to promote CTE education and video game design curriculum.

Lesson 3

Contacts

Objectives

Students will create contacts in Microsoft Outlook. Students will edit contacts in Microsoft Outlook. Students will search Microsoft Outlook for contacts. Students will organize contacts in Microsoft Outlook. Students will edit contact groups in Microsoft Outlook.

Situation

Your new employer has asked you to set up your e-mail and contact information in Microsoft Outlook. The company needs you to be able to fully leverage Microsoft Outlook as a collaborative-communication tool. Before using and editing data in Outlook, the company has asked that you first gather some resources to be used in setting up Microsoft Outlook.

Getting Started



New E-mail



Online Pictures

1. Launch Microsoft Outlook 2013.
2. Click the **New E-mail** button in the **New** group on the **Home** tab of the ribbon. A new, blank e-mail message is opened in a new window. This window contains a ribbon, just like the main Outlook window.
3. Click in the main text box of the e-mail message, and click the **Online Pictures** button in the **Illustrations** group on the **Insert** tab of the ribbon. The **Insert Pictures** dialog box is displayed, as shown in **Figure 3-1**.
4. Click in the text box, and enter a search term such as face smile.
5. Click the **Search** button to search for images.
6. Scroll through the results that are displayed to locate an image that primarily shows a face, click the image to select it, and click the **Insert** button to place the image into the e-mail message.
7. Right-click on the photograph in the e-mail message, and click **Save as Picture...** in the shortcut menu. A standard save dialog box is displayed.
8. Navigate to your working folder, and save the photograph with your first name as the file name.
9. Applying what you have learned, save four additional face photographs. Name each file as the first names of your friends.
10. Close the e-mail message by clicking the close button (X) in the upper-right corner. When prompted, do not save or keep a draft of the message.

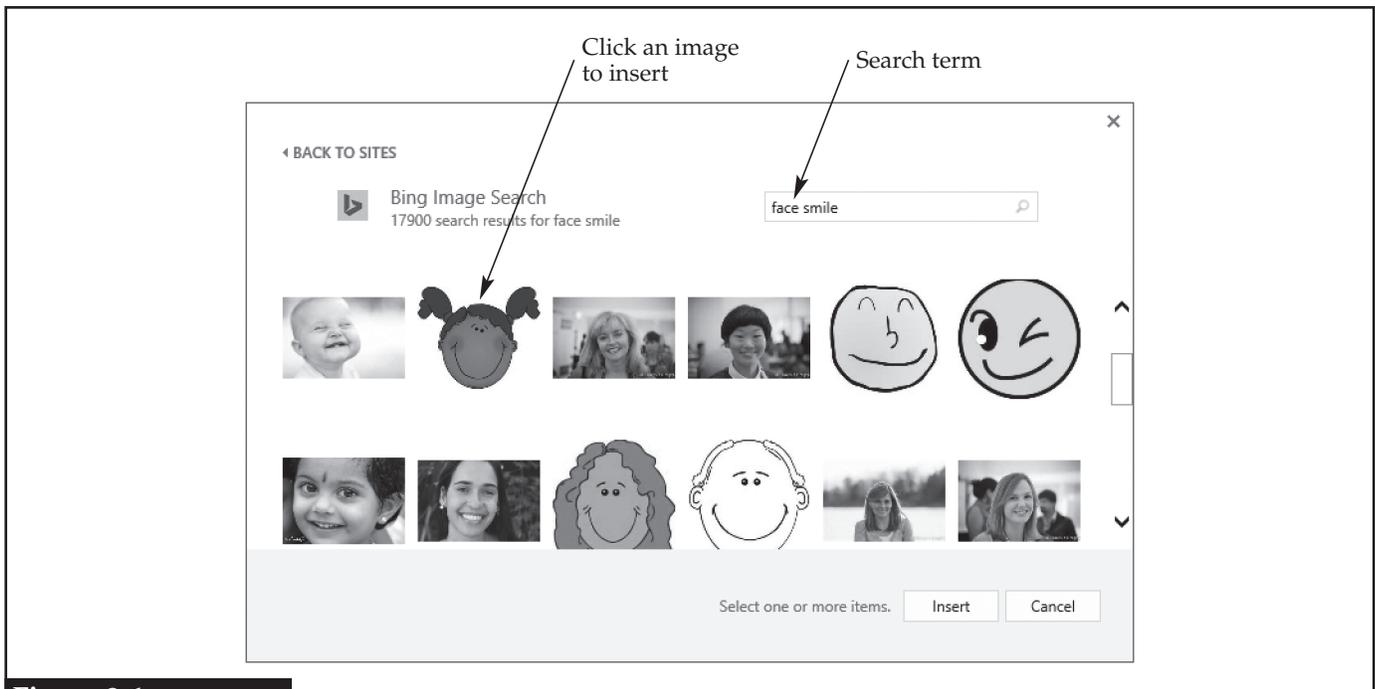


Figure 3-1.

Locating photographs from online pictures.

Creating Contacts

Contacts are the people that you regularly send and receive messages. Contacts are typically stored in a list or an address book. To start using Outlook, you will create some contacts that will be used later.

11. Click the **People** link at the bottom of the screen to display the contacts view. Notice how some different commands are available in the ribbon.
12. Click the **New Contact** button in the **New** group on the **Home** tab of the ribbon. The **Contact** dialog box is displayed, as shown in **Figure 3-2**.
13. Click in the top text box next to the **Full Name...** button, and enter the name Red Miller.
14. Click in the **Company:** text box, and enter Fun Fruit for Food. Notice that a business card is created in the upper-right corner of the dialog box as information is entered.
15. Click in the **Job title:** text box, and enter Owner.
16. Click in the text box next to the **E-mail...** button, and enter Red@funfruitfood.xyz. Notice the **Display as:** text box is automatically filled in based on the e-mail and the name. It may take a few seconds for this to occur.
17. Click in the text box in the **Addresses** area, enter 123 Mango Street, press the [Enter] key to start a new line, and enter Pineapple, PA 25599.
18. Click in the text box next to the **Business...** button in the **Phone** area, and enter (555) 999-9001. When you press the [Enter] key or click in another text box, the **Location Information** dialog box is displayed, as shown in **Figure 3-3**. Note: if the location has already been set, this dialog box will not be displayed, in which case skip to step 20.



**New
Contact**

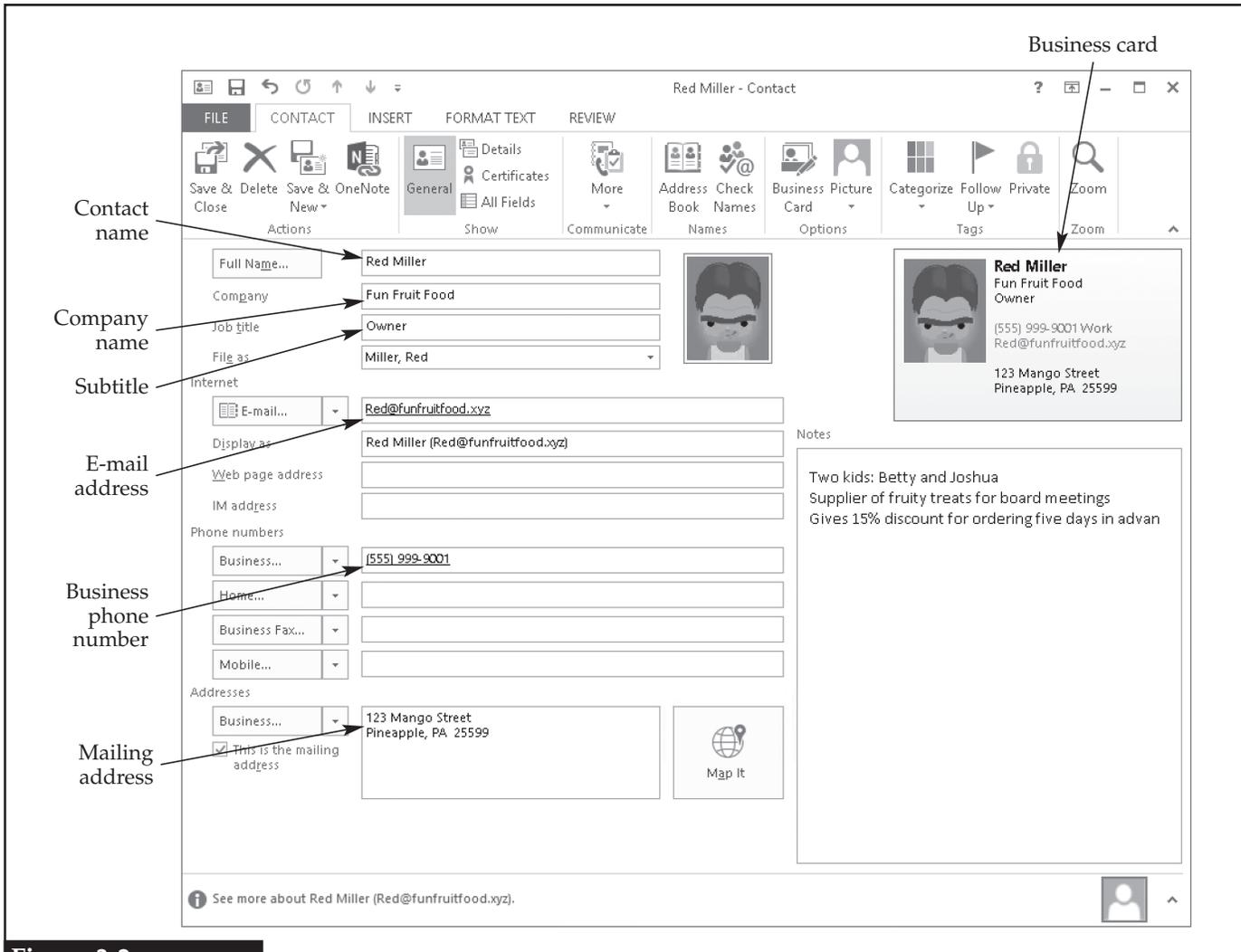


Figure 3-2.

Creating a new contact.

19. In the **Location Information** dialog box, click in the **What area code (or city code) are you in now?** text box, enter 555, and click the **OK** button. The **Phone and Modem** dialog box is displayed. Click the **OK** button to close this dialog box.
20. Click the **Add Contact Picture** image tile, which currently shows a blank outline of a person. A standard open dialog box is displayed.
21. Navigate to your working folder, select one of the images saved earlier, and click the **OK** button to add the image to the contact. Notice the image also appears on the business card. This is a very convenient way to remember people and make sure you are sending e-mails to the correct person.
22. Click in the **Notes** text box below the business card. This is a great place to add information about the contact, such as personal information, people you both know, or why you typically contact this person. Add the following information.

Two kids: Betty and Joshua

Supplier of fruity treats for board meetings

Gives 15% discount for ordering five days in advance

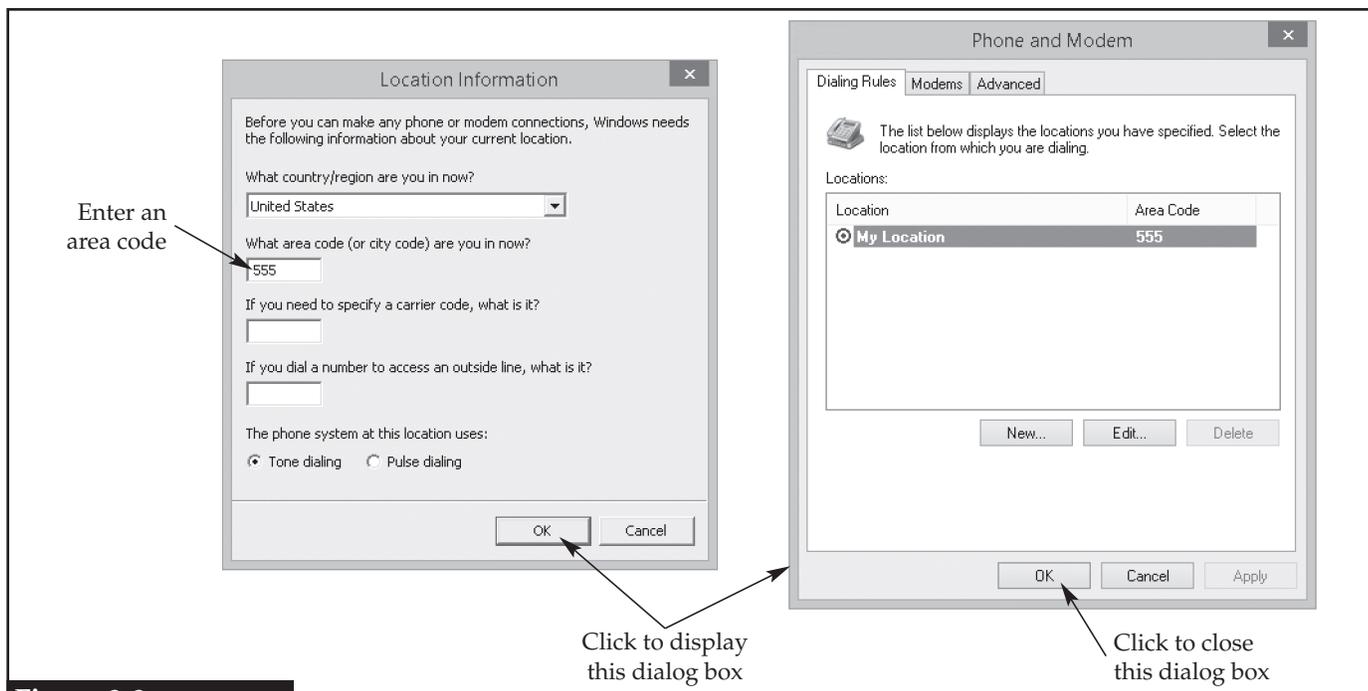


Figure 3-3.

After location information is set up, these dialog boxes will not appear again.



**Save &
Close**

23. Click the **Save & Close** button to finish adding the contact. The business card for the contact is displayed in the middle of the contacts view. As contacts are added, their business cards will be displayed in this view.
24. Applying what you have learned, add the contacts shown in **Figure 3-4**. Using the images saved earlier, add an image to each contact.

Editing Contacts



Phone

25. In the contacts view, click the **Phone** button in the gallery in the **Current View** group on the **Home** tab of the ribbon. The contacts view changes to display the contacts in list form.
26. In the **Business Phone** column, click the phone number for Malik Penny, and enter the new number of (555) 222-1234. You may need to click twice to make the phone number editable.

| | | | | |
|------------------------|--------------------------------------|--------------------------------------|---------------------------------------|-----------------------------------|
| Full Name | Ray Tanaka | Malik Penny | Isabella Lopez | Zoe Morales |
| Company | Ray and Son Growers | Shiny Penny Car Wash | SpaceTech Manufacturing | Outlook Elementary School |
| Job Title | Manager | Repair Technician | Loading Agent | Grade 4 Teacher |
| E-mail | Ray@rayson.xyz | Malik@carwash.xyz | Bella@spacetech.xyz | Zoe.Morales@doe.xyz |
| Business Phone | (555) 333-0002 | (555) 444-0005 | (555) 777-0006 | (555) 888-0007 |
| Mailing Address | 951 Fourth Street Ellis, CA 23395 | 421 Washout Lane Canyon, MS 23397 | 321 Blastoff Road Rocket, FL 03398 | 8642 Even Avenue Odd, MN 13579 |

Figure 3-4.

Information to be used in creating new contacts.

TIP

Double-clicking on a contact in any view opens the **Contact** dialog box, and the contact details can be edited.

**Business Card****TIP**

The pop-up window displayed by hovering the cursor over the **People** link at the bottom of the screen can be used to search for contacts.

27. Click the **Business Card** button in the gallery in the **Current View** group on the **Home** tab of the ribbon. The contacts view changes to display the business cards for the contacts.
28. Double-click the business card for Zoe Morales. The **Contact** dialog box is displayed.
29. Change her job title to Grade 5 Teacher.
30. Close the **Contact** dialog box by clicking the **Save & Close** button to update the contact information.
31. Applying what you have learned, add a note to the Zoe Morales contact information that states Conference period 12:00 to 1:00 daily.

Searching for Contacts

There are currently only a few contacts, but you may have hundreds of business contacts. Locating the correct contact could be very time-consuming. Fortunately, Outlook allows contacts to be located by searching for information.

32. With the contacts view displayed, click in the text box in the **Find** group on the **Home** tab of the ribbon, as shown in **Figure 3-5**. This is a search text box.
33. Enter isa. Since there is only one contact that meets this search, a pop-up window is displayed containing information for Isabella Lopez as the [Enter] key is pressed. This pop-up window can be used to schedule a meeting, send an e-mail, or other task.
34. Close the pop-up window by clicking the **Close** button (X) in the upper-right corner of the window.

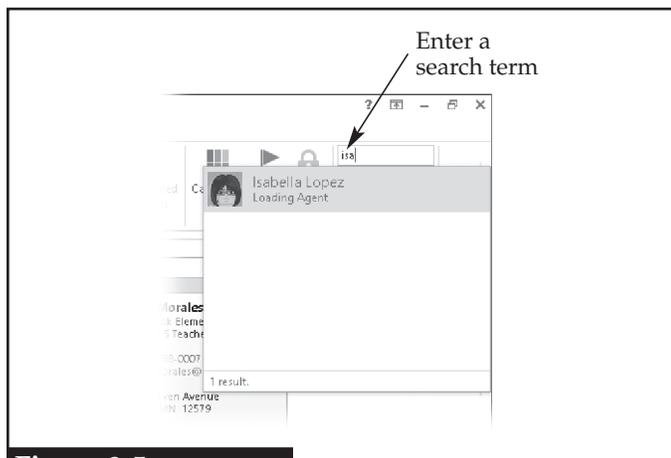


Figure 3-5.
Searching for contacts.

35. Enter the letter ma in the search box. This time, there are three matches: Malik Penny, Isabella Lopez (because of “manufacturing” in the company name), and Ray Tanaka (because his position is “manager”). In the list that is displayed, click the contact you wish to use, and the pop-up window is displayed for that contact.
36. Applying what you have learned, search for the Zoe Morales contact, and display the pop-up window.
37. Click the **Edit** link in the pop-up window. The window changes to allow edits. Click the **Notes** link in the pop-up window, add a note stating her birthday is August 14, and click the **Save** button to update the contact information.
38. Close the pop-up window.

Organizing Contacts

Contacts can be categorized into a folder or group. A *folder* contains contacts and groups. Folders are also different address books. A *group* is a distribution list, which is a subset of your contacts. A group can contain contacts from several folders.

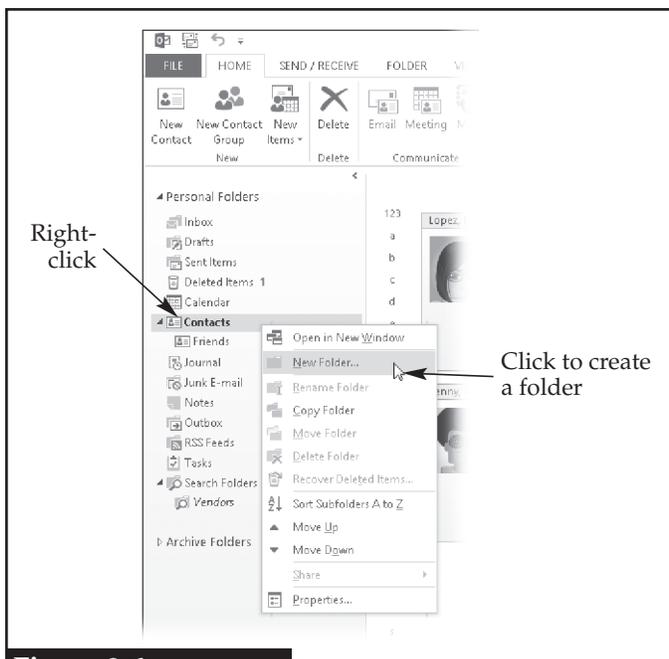


Figure 3-6.

Creating a new folder within the **Contacts** folder.

TIP

The business card view may not be the default view for the Friends folder. Display business cards if needed.



New Contact Group



Add Members

TIP

To select members from a different location, click the **Address Book** drop-down list in the **Select Members** dialog box, and select the location in the drop-down menu.

39. Click the ellipses link (...) at the bottom of the screen, and click **Folders** in the shortcut menu. The folder list is displayed in the pane on the left of the Outlook window.
40. Right-click on the **Contacts** branch in the folder list, and click **New Folder...** in the shortcut menu, as shown in **Figure 3-6**. The **Create New Folder** dialog box is displayed.
41. Click in the **Name:** text box, enter **Friends**, and click the **OK** button to create the new folder. The folder is added under the **Contacts** branch in the folder list.
42. Display business cards in the contacts view, and display the folder list.
43. Click the business card for **Zoe Morales**, hold, drag it into the **Friends** folder in the folder list, and drop it. This *moves* the contact into the destination folder.
44. Click the **Friends** folder in the folder list to verify the contact has been moved into the folder. The business card for **Zoe Morales** should be displayed in the middle of the Outlook window without any other business cards.
45. Click the **Contacts** folder in the folder list to display its contents.
46. Click and hold the business card for **Ray Tanaka**, hold the [Ctrl] key, and drag the card into the **Friends** folder. By holding the [Ctrl] key, the contact is *copied* into the destination folder. It remains in the **Contacts** folder as well.
47. Click the **Friends** folder to display its contents and verify the business card is in the folder.
48. With the **Contacts** folder open, click the **New Contact Group** button in the **New** group on the **Home** tab of the ribbon. The **Contact Group** dialog box is displayed.
49. Click in the **Name:** text box, and enter **Vendors**.
50. Click the **Add Members** button in the **Members** group on the **Contact Group** tab of the ribbon in the **Contact Group** dialog box, and click **From Address Book** in the shortcut menu. The **Select Members** dialog box is displayed, as shown in **Figure 3-7**. Notice only the contacts in the **Contacts** folder are displayed in this dialog box.
51. Click **Red Miller** in the list of contacts, and click the **Members** button at the bottom of the dialog box. The contact name is added to the text box to the right of the **Members** button.
52. Click **Ray Tanaka** in the list, and click the **Members** button to add him as a member of the group.
53. Click the **OK** button to close the **Select Members** dialog box. The **Vendors** group being created now has two members listed.

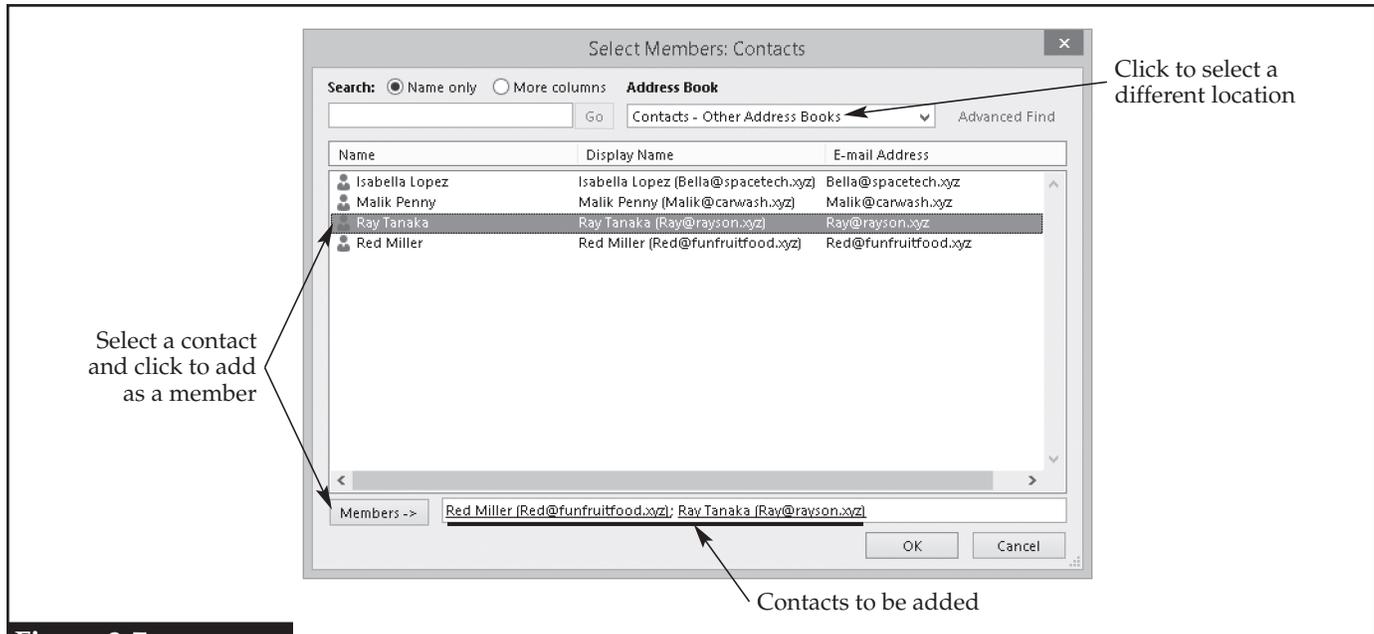


Figure 3-7.

Selecting the members to be included within a contact group.



**Save &
Close**

54. Click the **Save & Close** button to finish creating the group. Notice a business card is added to the contacts view for the Vendors group, but business cards are also shown for the individual contacts who are members of the Vendors group.
55. Applying what you have learned, create a new group named Customers that contains Malik Penny and Isabella Lopez.

Editing Contact Groups

Occasionally, you may want to send a single message to several groups. Groups can be easily combined or joined in Outlook. It is just as easy to remove a contact from a group.

56. In the contacts view, double-click the business card for the Vendors group.
57. Applying what you have learned, add the Customers group as a member of the Vendors group.
58. Save the Vendors group.
59. Applying what you have learned, open the Customers group.
60. Select the Malik Penny contact, and click the **Remove Member** button in **Members** group on the **Contact Group** tab of the ribbon in the **Contact Group** dialog box. The contact is no longer part of the group.
61. Save the Customers group.
62. Applying what you have learned, create a new contact folder named Me, and add a contact using your own information.



**Remove
Member**



Answers

Lesson 1

Activity 1-1

- | | |
|-------------------------|---------------------------|
| 1. Home | 14. View |
| 2. File | 15. Home |
| 3. Send/Receive | 16. Send/Receive |
| 4. Folder | 17. Folder |
| 5. View | 18. View |
| 6. Home | 19. Folder |
| 7. File | 20. Home or Folder |
| 8. Send/Receive | 21. Send/Receive |
| 9. Folder | 22. Home |
| 10. View | 23. Folder |
| 11. Home | 24. File |
| 12. Send/Receive | 25. View |
| 13. Folder | |

Activity 1-2

- | | |
|---|--|
| 1. Delete ; deletes the selected item | 11. Rename This Folder ; renames the selected folder |
| 2. New Search Folder ; creates a new folder for displaying search results | 12. Change View ; changes the current view to a different view |
| 3. Reverse Sort ; reverses the sort order of the current view | 13. Add Columns ; allows selection of which fields to display in the view |
| 4. Forward ; forwards the selected item to another recipient | 14. Folder Properties ; displays the properties of the selected folder |
| 5. Process Marked Headers ; downloads the content of all marked messages | 15. Move ; moves or copies the selected item to a different folder |
| 6. AutoArchive Settings ; specifies when the current folder will be archived | 16. Junk ; marks the selected item as junk or to allow it |
| 7. Show Progress ; shows the current send/receive status | 17. Mark All As Read ; marks all messages in the current folder as read |
| 8. Categorize ; applies a category to the selected item | 18. Reminders Window ; displays the Reminders dialog box |
| 9. Reply with Meeting ; replies to the selected e-mail with a meeting invite | 19. Reading Pane ; shows or hides the Reading pane |
| 10. Send/Receive All Folders ; sends and receives all items in all folders | 20. Filter E-mail ; filters messages in the current folder |