CERTIFICATION PREP

Microsoft Outlook 2016

Common
Occupational
Readiness
Essentials

D. Michael Ploor

Certification Prep Series

Start on Monday.
Test on Friday.

by D. Michael Ploor

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 2016
- Microsoft Excel 2016
- Microsoft PowerPoint 2016
- Microsoft Outlook 2016
- Microsoft Access 2016
- Microsoft Word 2013
- Microsoft Excel 2013
- Microsoft PowerPoint 2013
- Microsoft Outlook 2013
- Microsoft Access 2013

Microsoft Office 2010 is also available.

Adobe Products

- Adobe Photoshop Creative Cloud
- Adobe Dreamweaver Creative Cloud
- Adobe Flash Creative Cloud
- Adobe Illustrator Creative Cloud
- Adobe InDesign Creative Cloud
- Adobe Photoshop CS6
- Adobe Dreamweaver CS6
- Adobe Flash CS6
- Adobe Photoshop CS5
- Adobe Dreamweaver CS5
- Adobe Flash CS5

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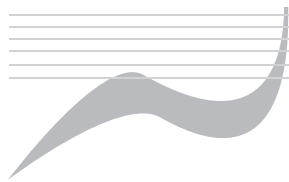To learn more, please contact your G-W Educational Consultant, visit www.g-w.com, or call 800.323.0440.

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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 2016 will help prepare you to take the Microsoft Office Specialist (MOS) Microsoft Outlook 2016 certification exam. It provides step-by-step instruction for 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. 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. Students will share contact information stored in Microsoft Outlook with other users.

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 2016.

2. Click the **New E-mail** button on the ribbon (**Home** tab>**New** group). 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 on the ribbon (**Insert** tab>**Illustrations** group). 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-type 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.
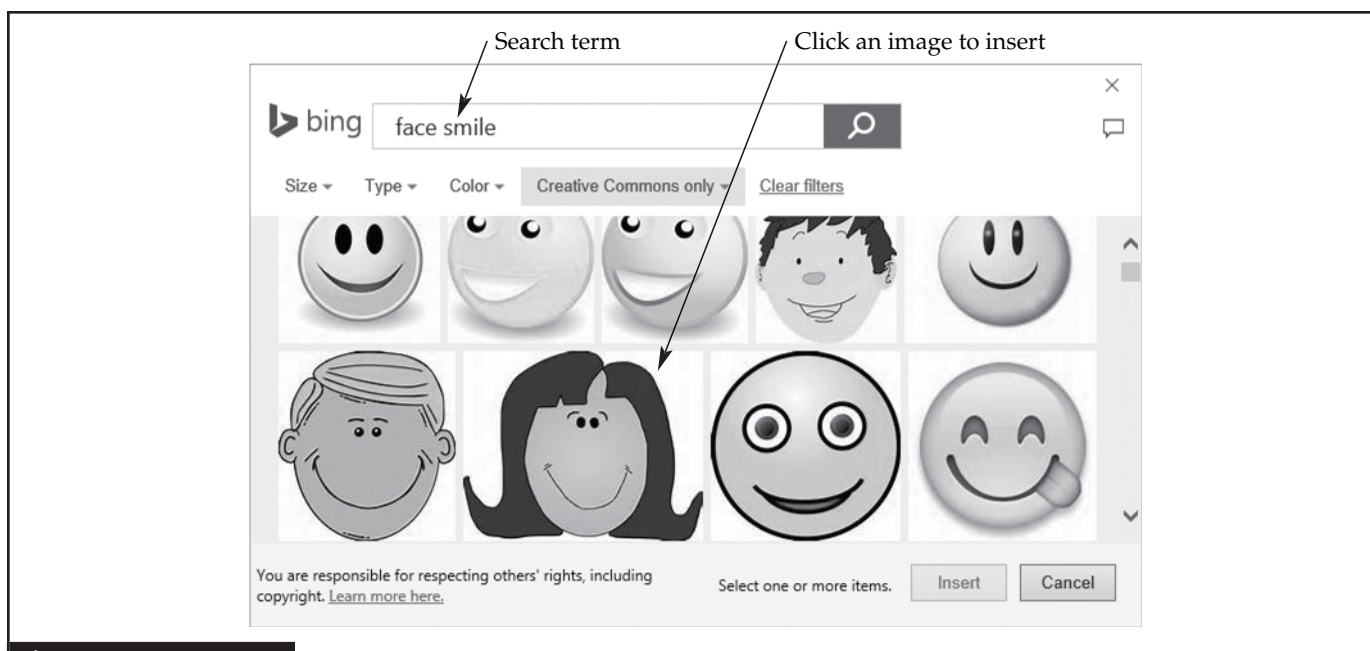
Figure 3-1.

Locating photographs from online pictures.

Creating Contacts

Contacts are the people with whom 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.

Contacts

New Contact

11. Click the **Contacts** button 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 on the ribbon (**Home** tab>**New** group). 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 numbers** area, and enter (555) 999-9001.

19. Click the **Add Contact Picture** image tile, which currently shows a blank outline of a person. A standard open-type dialog box is displayed.

20. Navigate to your working folder, select one of the images saved earlier, and click the **Open** 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.
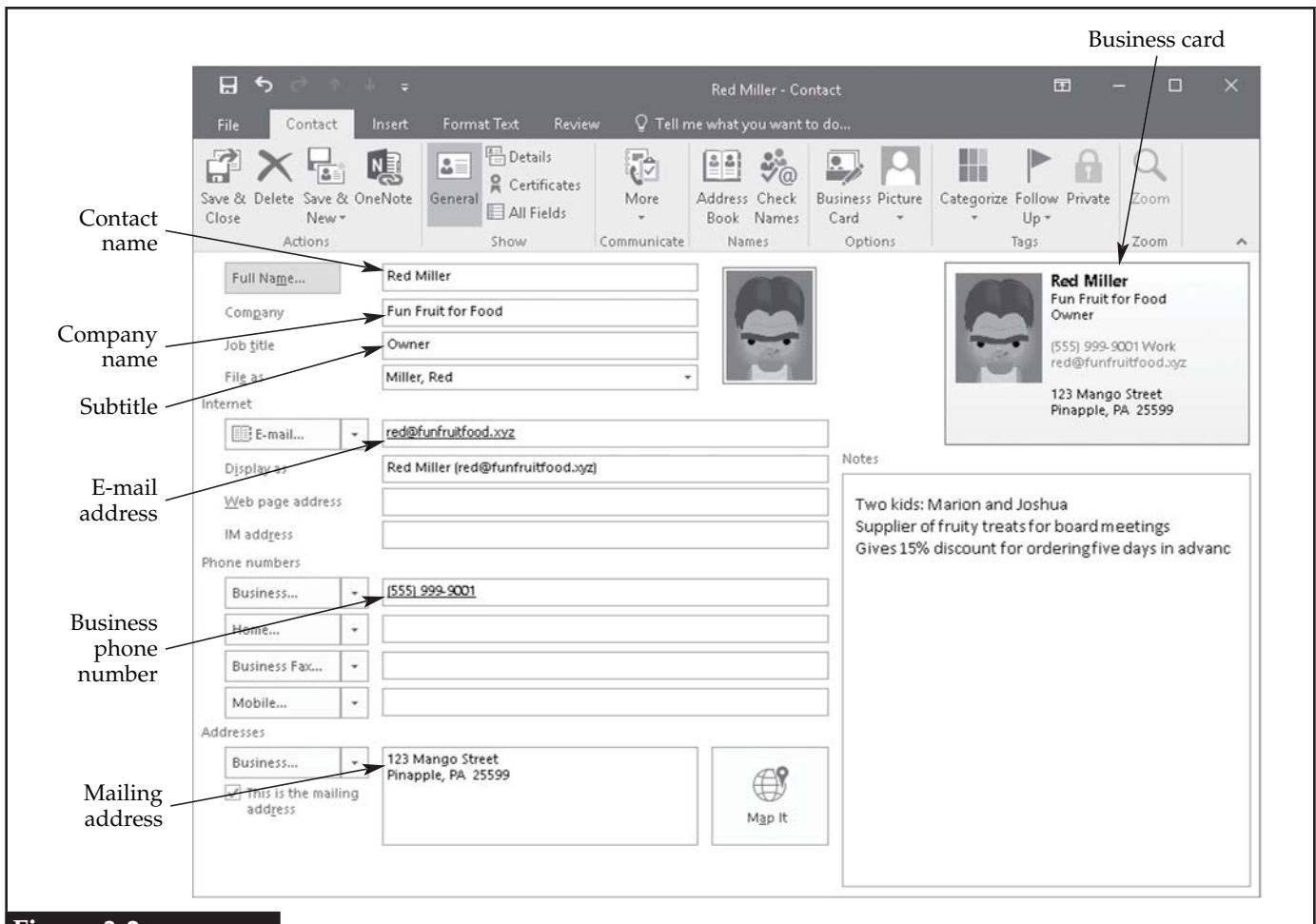
Figure 3-2.

Creating a new contact.

21. 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: Marion and Joshua

    Supplier of fruity treats for board meetings

    Gives 15% discount for ordering five days in advance

Save & Close

22. Click the **Save & Close** button to finish adding the contact. The contact is displayed in the middle of the contacts view. As contacts are added, they will be displayed in this view. By default, contacts are displayed as a list of names with their pictures, but the view can be set up to display full business cards or just the textual information on each business card as well.

23. Applying what you have learned, add the contacts shown in **Figure 3-3.** Using the images saved earlier, add a picture to each contact.

Editing Contacts

Phone

24. In the contacts view, click the **Phone** button on the ribbon (**Home** tab>**Current View** group). The contacts view changes to a list without pictures of each contact, but with the textual information for each displayed.

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 3-3.

Information to be used in creating new contacts.

Business Card

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

25. 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.

26. Click the **Business Card** button on the ribbon (**Home** tab>**Current View** group). The contacts view changes to display the business cards for the contacts.

27. Double-click the business card for Zoe Morales. The **Contact** dialog box is displayed.

28. Change her job title to Grade 5 Teacher.

29. Close the **Contact** dialog box by clicking the **Save & Close** button to update the contact information.

30. 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.

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

31. With the contacts view displayed, click in the text box in the **Home** tab>**Find** group on the ribbon, as shown in **Figure 3-4.** This is a search text box. There is also an advanced search box above the contacts view just below the ribbon that is always displayed no matter which ribbon tab is current.

32. 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.

33. Close the pop-up window by clicking the **Close** button (X) in the upper-right corner of the window.

34. Enter the letters 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.

35. Applying what you have learned, search for the Zoe Morales contact, and display the pop-up window.
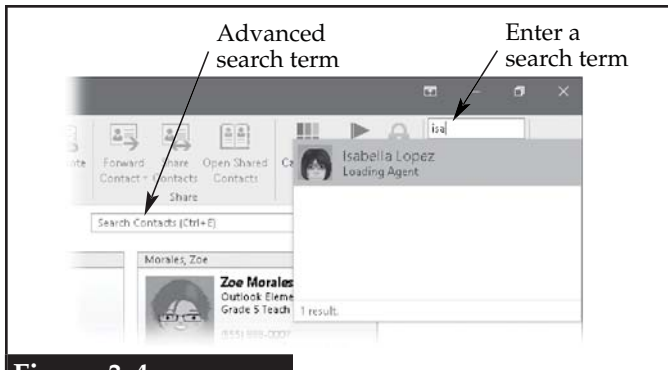
Figure 3-4.

Searching for contacts.

Has Phone Number

Close Search

36. 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.

37. Close the pop-up window.

38. Applying what you have learned, search for the Malik Penny contact, display the pop-up window, and add a home phone number of (555) 687-5309.

39. Click in the advanced search box below the ribbon. The **Search** tab is displayed in the ribbon, which contains tools for conducting an advanced search, as shown in **Figure 3-5.**

40. Click the **Has Phone Number** button on the ribbon (**Search** tab>**Refine** group), and click **Has Home Phone** in the drop-down menu that is displayed. The business card for Malik Penny is displayed because he is the only contact who has a home phone number. Also, notice how the search string is constructed in the advanced search box, as shown in **Figure 3-5.**

41. Click the **Close Search** button on the ribbon (**Search** tab>**Close** group) to exit the advanced search.

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.

42. Click the ellipsis button (**…**) 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.

43. 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.
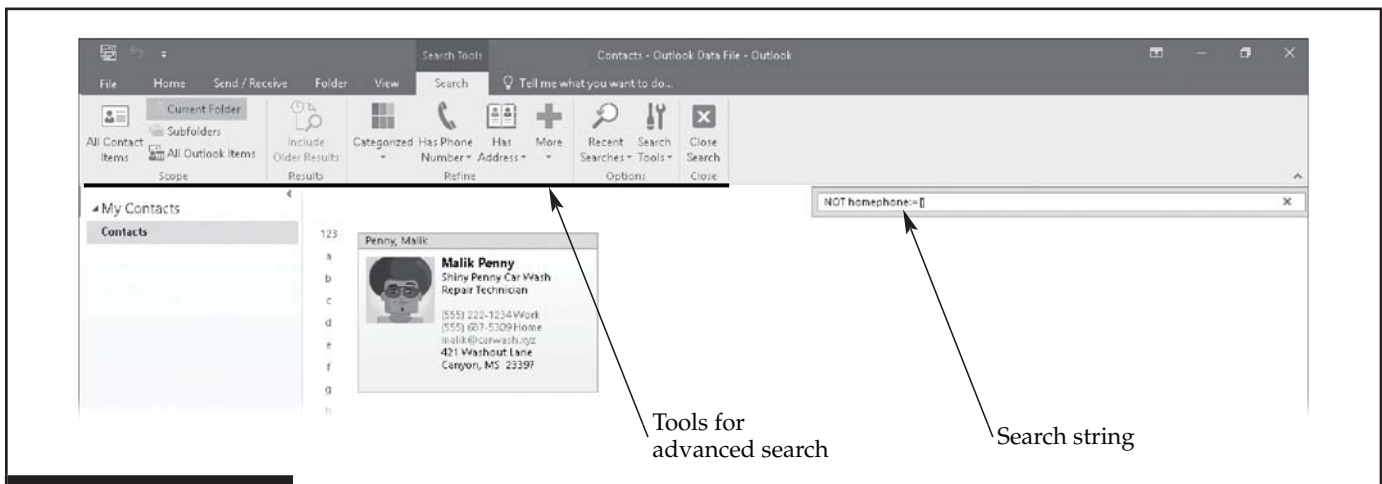

Tools for advanced search

Search string

Figure 3-5.

Conducting an advanced search for contacts who have a home phone number.

Right-click →

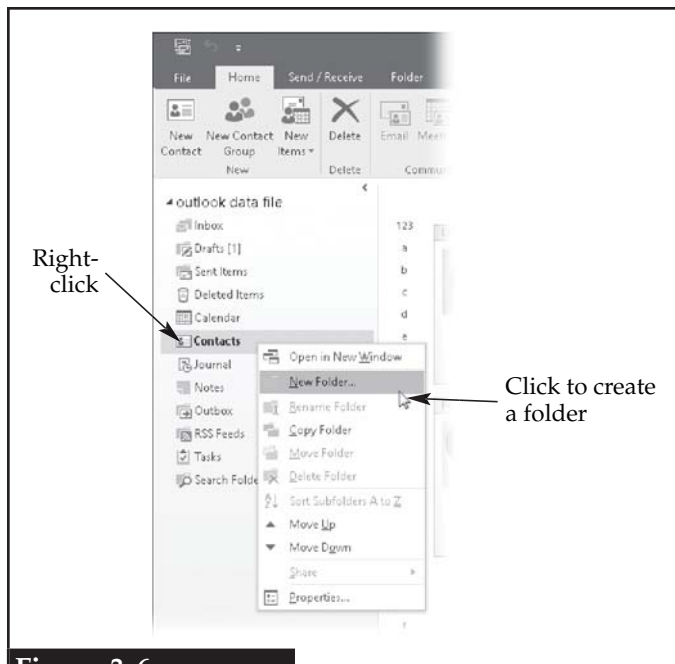Click to create a folder →

Figure 3-6.

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

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.

Save & Close

44. 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.

45. Display business cards in the contacts view, and display the folder list.

46. 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.

47. 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. Display business cards if needed.

48. Click the Contacts folder in the folder list to display its contents.

49. 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.

50. Click the Friends folder to display its contents and verify the business card for Ray is in the folder.

51. With the Contacts folder open, click the **New Contact Group** button on the ribbon (**Home** tab>**New** group). The **Contact Group** dialog box is displayed.

52. Click in the **Name** text box, and enter Vendors.

53. Click the **Add Members** button on the ribbon in the **Contact Group** dialog box (**Contact Group** tab>**Members** group), 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.

54. 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.

55. Click Ray Tanaka in the list, and click the **Members** button to add him as a member of the group.

56. Click the **OK** button to close the **Select Members** dialog box. The Vendors group being created now has two members listed.

57. 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.

58. Applying what you have learned, create a new group named Customers that contains Malik Penny and Isabella Lopez.
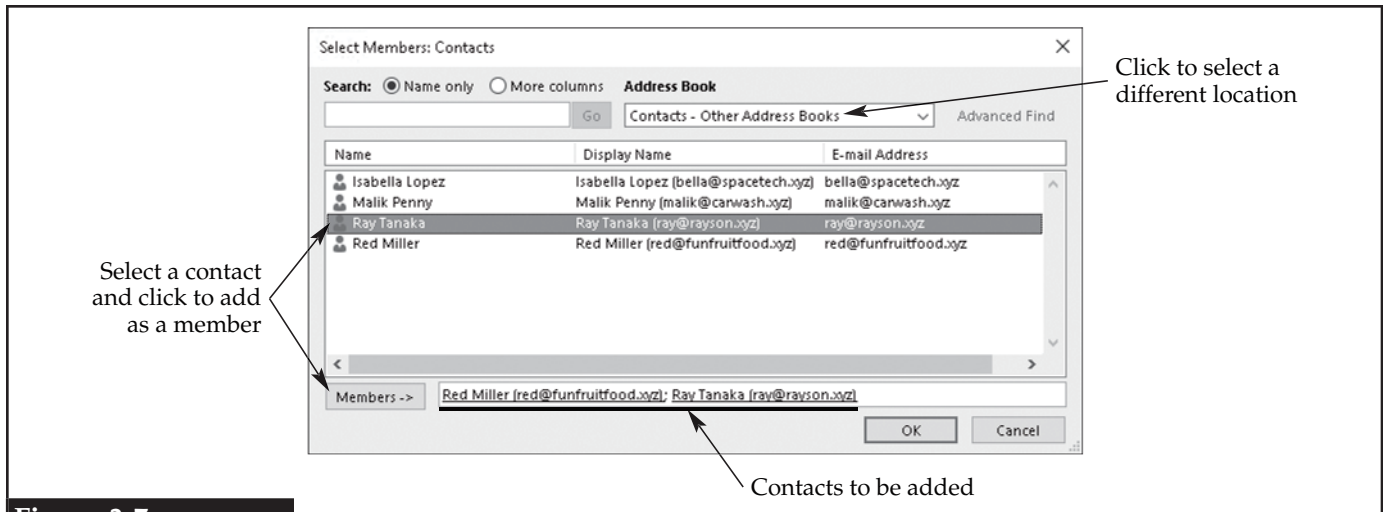
Figure 3-7.

Selecting the members to be included within a contact group.

Editing Contact Groups

Occasionally, you may need 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.

59. In the contacts view, double-click the business card for the Vendors group.

60. Applying what you have learned, add the Customers group as a member of the Vendors group.

61. Save and close the Vendors group.

62. Applying what you have learned, open the Customers group.

63. Select the Malik Penny contact, and click the **Remove Member** button on the ribbon in the **Contact Group** dialog box (**Contact Group** tab>**Members** group). The contact is no longer part of the group.

Remove Member

64. Save and close the Customers group.

65. Applying what you have learned, create a new contact folder named Me, and add a contact using your own information.

66. Applying what you have learned, display business cards in the Contacts folder.

Categorize

67. Select the business card for Red Miller, and click the **Categorize** button on the ribbon (**Home** tab>**Tags** group). Then, click **Orange Category** in the drop-down menu that is displayed. Tags such as categories can be used to manage contacts.
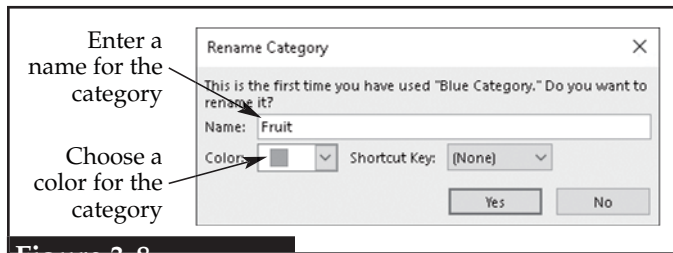
TIP

If using tags as a management tool, be consistent in how you assign the tags. For example, if you have a category named Customers and the color orange assigned to it, do not assign personal contacts to this category.

68. If this is the first time the category has been used, the **Rename Category** dialog box shown in **Figure 3-8** is displayed. This dialog box allows you to change the default name of the category if you wish. For example, you may wish to rename the category to Top Customers or School Contacts. Note: if this dialog box is not displayed, the category can be renamed later (**Home** tab>**Tags** group>**Categorize**>**All Categories…**).

69. Click in the **Name** text box in the **Rename Category** dialog box, enter Fruit, and click the **Yes** button. The contact is assigned to a category named Fruit that has the color orange assigned to it.

70. Applying what you have learned, assign the Fruit category (orange) to Ray Tanaka.

List

Enter a name for the category →

Choose a color for the category →

Figure 3-8.

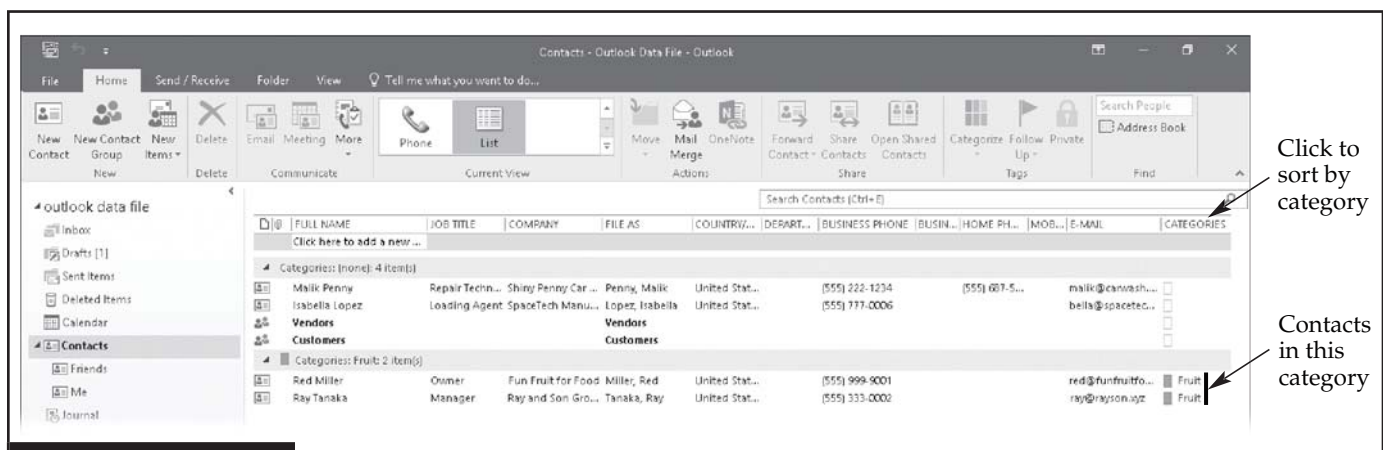When a category is used for the first time, it can be renamed. Categories can be renamed later, too.

By displaying the folder before starting the wizard, the folder is the default in the wizard. It is not necessary to select the folder first, but doing so can streamline the process.

71. Click the **List** button on the ribbon (**Home** tab>**Current View** group) to display the contacts in list form. Notice how the category is displayed for Red and Ray. You may need to scroll the view to the right to see the Categories column.

72. With the list view displayed, click the Categories heading. The contacts are sorted by category with uncategorized contacts at the top of the list, as shown in **Figure 3-9.** Note: if you click the heading again, the list is sorted in reverse order, so the uncategorized contacts will be at the bottom of the list.

Sharing Contacts

Contacts can be imported from an external source, such as a file exported from another user's Outlook. This allows sharing of contacts, but contacts can also be shared by forwarding them as attachments to e-mail messages.

73. Applying what you have learned, display business cards in the Me folder.

74. Click **File** tab>**Open & Export**, and then click **Import/Export** on the right-hand side of the backstage view. A wizard is displayed to guide you through the importing or exporting process.

75. On the first page of the wizard, click **Export to file** in the list, and then click the **Next** button.

76. On the second page of the wizard, click **Comma Separated Values** in the list, and then click the **Next** button. A comma separated values (CSV) file is a text file with data for each entry separated by a comma.

77. On the third page of the wizard, select the Me folder in the folder tree, and click the **Next** button.

78. On the fourth page of the wizard, click the **Browse…** button, navigate to your working folder, and name the file Contact. The .csv file extension will be automatically added. When the file name and location are set, click the **Next** button in the wizard.

79. On the final page of the wizard, make sure **Export "Contacts" from folder: Me** is checked, and then click the **Finish** button. The data for the contact are saved in

Click to sort by category

Contacts in this category

Figure 3-9.

Categories can be used to organize contacts. Clicking the Categories **heading sorts the list by category.**

the CSV file, but not removed from Outlook. This file can be shared with other users so they can import the contact into their Outlook sessions.

80. Display the Friends folder.

81. Click **File** tab>**Open & Export**, and then click **Import/Export** on the right-hand side of the backstage view.

82. On the first page of the wizard, click **Import for another program or file**, and then click the **Next** button.

83. On the second page of the wizard, click **Comma Separated Values**, and then click the **Next** button. The file type selected here must match the type of file being imported.

84. On the third page of the wizard, click the **Browse…** button, navigate to your working folder, and select the Contact.csv file. Also, click the **Replace duplicates with items imported** radio button in the wizard, and then click the **Next** button.

85. On the fourth page of the wizard, select the Friends folder in the folder tree, and click the **Next** button.

86. On the final page of the wizard, make sure **Import "Contacts.csv" into folder: Friends** is checked, and then click the **Finish** button. The contact that you exported from the Me folder is now included in the Friends folder. Note: the image assigned to the contact will not be imported as that data cannot be included in a CSV file.

87. Applying what you have learned, display the mail view and start a new e-mail message.

88. Click the **Attach Item** button on the ribbon in the message window, and click **Business Card**>**Other Business Card…** in the drop-down menu. The **Insert Business Card** dialog box is displayed, as shown in **Figure 3-10.**

89. Click the **Look in:** drop-down arrow, and click Friends in the drop-down list.

90. Click your business card in the list, and click the **OK** button. The contact is added to the message as a VCF file attachment and also inserted into the message body. The contact can now be shared via e-mail.

91. Click in the **Subject** text box in the message window, and enter Sharing Contact.

92. Click the **Save** button in the message window. The message is saved in the Drafts folder.

93. Close the message.

94. Close Outlook.

Attach Item

TIP
A VCF file is a vCard, or virtual card, format. This is a standardized format for sharing the type of data found on business cards.
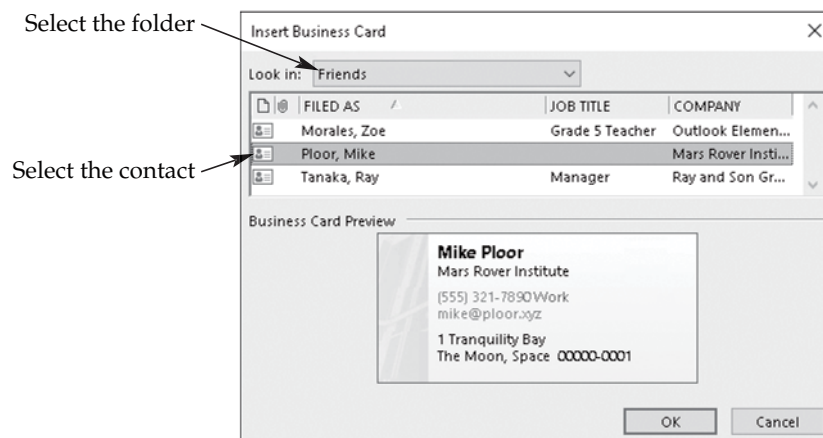

Figure 3-10. Attaching a business card to an e-mail message allows the contact to be shared with another user.

Answers

Lesson 1

Activity 1-1

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

Activity 1-2

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