

# Level 2 Electronic communication using Outlook (7266/7267-031)

## e-Quals Assignment guide for Candidates Assignment A



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# Level 2 Electronic communication using Outlook (7266/7267-031) Assignment A

## Introduction – Information for Candidates

### About this document

This assignment comprises all of the assessment for Level 2 Electronic communication using Outlook (7266/7267-031).

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### Health and safety

You are responsible for maintaining the safety of others as well as your own. You are asked to work safely at all times.

You will **not** be allowed to continue with an assignment if you compromise any of the Health and Safety requirements.

### Time allowance

The recommended time allowance for this assignment is **two hours**.

# Level 2 Electronic communication using Outlook (7266/7267-031)

## Candidate instructions

**Time allowance: Two hours**

### Assignment set up:

This assignment is made up of **four** tasks

- Task A - Edit contacts
- Task B - Update e-mail addresses and send an e-mail
- Task C - Use the calendar and set tasks
- Task D - Organise your inbox

### Scenario

You work as a personal assistant to Joe Hubbard, Marketing Director for an events company.

You have been asked to use Outlook to send e-mails, organise meetings and set up tasks for various members of your company.

Please read the text carefully and complete the tasks in the order given.

### Task A - Edit contacts

- 1 Start your PC and login.
- 2 Create a new folder called **Company E-mails** in your work area or removable media.

Open a new word processing document and save it as **Evidence** in the folder you have just created.

Open Outlook.

- 3 There are a number of e-mail contacts that are no longer required as they are personal contacts.

Delete the following contacts:

- **Marc Cooke**
- **Ben Quantrill.**

Continued over ...



- 4 A number of the contacts have incorrect company details edit the following:
- **Ben Pell** works for **Drewery Antiques** (edit accordingly)
  - **Samuel Perks** works for **Giltspur Innovations** (edit accordingly)
  - **Claire Hennesy** works for **Obelisk Consultants** (edit accordingly)
  - **Neil Grant** works for **Saracen** (edit accordingly).
- 5 In order to easily track information for campaigns and clients add the following categories to the **master categories** list.
- Restaurants
  - Clients
  - Solicitors
  - Innovations
  - Antiques
  - Staff Training.
- 6 Add all contacts from the following companies to the **Clients** category:
- Drewery Antiques
  - Giltspur Innovations
  - Cooke and Son
  - Gladstone Oils
  - Go Lite
  - Grant Maine
  - Mobile Town
  - Obelisk Consultants
  - Optimax
  - Saracen.
- 7 Add all contacts from the following companies to the **Restaurants** category:
- Pavones
  - Pioneer Fells.
- 8 Add all contacts from:
- **Gallaghers** to the **Solicitors** category
  - **Giltspur Innovations** to the **Innovations** category
  - **Drewery Antiques** to the **Antiques** category.

To show your manager that you have added all the contacts correctly, show them all in **category view** and produce a screen print. Paste it into your **Evidence** file and label it beneath the image as **Screen print 1**.

**Note:** this may require more than one screen print to show all contacts.

Continued over ...





- 9 To enable you to find contacts more easily in the future your manager has asked you to sort the **Address Cards** view, applying the following sort:

Company Name – Ascending then by First Name – Ascending.

Ensure that the **company name** is shown but **not** the **First Name**.

Take a screen print of this view and paste into your **Evidence** document.

Label it beneath the image as **Screen print 2**.

Continued over ...

## Task B – Update e-mail addresses and send an e-mail

1 Update the following contacts to include e-mail addresses:

- Andrew Hepton – **heptona@drewerys.co.uk**
- Ian Drewery – **dreweryi@drewerys.co.uk**
- Simone Heard – **heardsa@drewerys.co.uk**
- Antony Nassiri – **nassiria@drewerys.co.uk**
- Ben Pell – **pellb@drewerys.co.uk**

Start a new blank e-mail. Insert the following text:

*Hi*

*Just a quick e-mail to let you all know that I have recently taken over as Joe's PA. Please address any queries regarding bookings or training to myself from this point forward.*

*Regards*

*<Student Name>*

*PA to the Marketing Manager*

Insert your own name replacing <Student Name>, send the e-mail. (Do not worry if you receive a bounce e-mail response).

Use the address book to address the e-mail to all staff working at **Drewery's**.

Save the sent e-mail to your **Company E-mails** folder.

2 Add the following contacts to your address book.

First Name	Surname	Company	E-mail
Paul	Smith	Train.co.uk	Provided by centre
Angela	Brown	Train.co.uk	Provided by centre

Continued over ...

## Task C - Use the calendar and set tasks

- 1 The company is currently using a diary to keep track of meetings and other events. Your manager has asked you to add these into Outlook.

Add the following calendar events, appointments and meetings. Do **not** send invitations for any of the appointments below:

	Appointment 1	Appointment 2	Appointment 3
<b>Start Time:</b>	16:30	13:00	08:30
<b>End Time:</b>	17:30	14:30	09:00
<b>Start Day/Date:</b>	15th	21 <sup>st</sup>	Friday
<b>Recurrence pattern</b>	Monthly	Monthly	Weekly
<b>Recur on:</b>	(same date)	(same date)	Friday
<b>End after occurrences:</b>	3	2	20
<b>Subject:</b>	Meet with Trainers	Progress Meeting	Team Meeting
<b>Location:</b>	Training Room	Drewery Antiques	Conference Room
<b>Show time as:</b>	Busy	Tentative	Out of Office

- 2 Set up the following appointments.

Ensure that you are set as the meeting organiser for both appointments and add **Paul Smith** and **Angela Brown** as required attendees within the scheduling.

	Appointment 1	Appointment 2
<b>Subject:</b>	Staff Induction	Health and Safety Training
<b>Location:</b>	Training Room	Conference
<b>Start Day/Date:</b>	20 <sup>th</sup> of next month	27 <sup>th</sup> of next month
<b>Start Time:</b>	09:30	14:00
<b>End day/date</b>	20 <sup>th</sup> of next month	27 <sup>th</sup> of next month
<b>End Time</b>	12:00	16:45
<b>Reminder</b>	1 day before	4 hours before
<b>Show time as:</b>	Busy	Busy
<b>Label:</b>	Must Attend	Must Attend

Send Invitations to all attendees.

Add both events to the Staff Training Category.

Continued over...

3 Set up the following task:

**Subject:** Staff Induction  
**Due Date:** 20<sup>th</sup> of next month  
**Start Date:** Today's Date  
**Priority:** High  
**Reminder:** 19<sup>th</sup> of next month 2pm

Add the following details to the main body of the task:

*Please ensure you bring the following items for the Staff Induction tomorrow*

*Projector  
Laptop  
Staff Induction DVD  
Flip Chart  
Flip Chart Pens  
A4 pads  
Pens*

Assign the task to **Paul Smith**.

Send the task.

Ensure that you keep an updated copy of the task on your task list and that you have set **Send me a status report when the task is complete**.

4 Set up the following task:

**Subject:** Health and Safety Training  
**Due Date:** 27<sup>th</sup> of next month  
**Start Date:** Today's Date  
**Priority:** Normal  
**Reminder:** 26<sup>th</sup> of next month 2pm

Add the following details to the main body of the task:

Please ensure you bring the usual training resources

Assign the task to **Angela Brown**.

Send the task.

Do **not** keep an updated copy of the task on your task list but ensure that you have set **Send me a status report when the task is complete**.

Continued over...

- 5 Your line manager has asked you to produce a presentation for him. You have made some paper based notes transfer them to the note area within outlook to remind you of the key points.

*Powerpoint Presentation*

*5 Slides required*

*Dark Blue Background on all slides*

*White text*

*1<sup>st</sup> Slide heading*

*Annual Report*

*2<sup>nd</sup> Slide Heading*

*Income*

*3<sup>rd</sup> Slide Heading*

*Expenditure*

*4<sup>th</sup> Slide Heading*

*Profit & Loss*

*5<sup>th</sup> Slide Heading*

*Forthcoming business*

Set the note colour to **green** so that it stands out from any other note you may have in your notes area.

- 6 Filter the **Notes** view to show only **green notes**, this will ensure that the note does not get missed amongst all other notes.

Create a screen print and paste into the **Evidence** document.

Save the **Evidence** document into your work area as **Evidencev1**.

- 7 Your line manager is keen to have the calendar available for all to see as a web page.

Save the calendar as a web page for the next two months, including appointment details, with the name **Company Calendar** to the folder called **Company E-mails** you created earlier.

Continued over ...

## Task D - Organise your inbox

1 In the inbox, create the following folders to store e-mails:

- High Importance
- Personal
- To be Archived
- New Clients.

2 Filter your inbox so that it shows only those e-mails sent with **High Importance**.

Set the flag on these messages to **red** and **For Your Information**.

Produce a screen print to show your filtered inbox then paste it into your **Evidencev1** document.

Once you have done this move these e-mails into the **High Importance** folder.

3 In your inbox change the filter so that you can see only the e-mails with the category **Personal**.

Produce a screen print to show your filtered inbox then paste it into the **Evidencev1** document.

Once you have done this move these e-mails into the **Personal** folder.

4 In your inbox and change the filter so that you can see only the e-mails with the category **Clients**.

Produce a screen print to show your filtered inbox then paste into the **Evidence** document.

Save your evidence document As **Evidencev2**

Move these e-mails into the **To be Archived Folder**. Set the properties on this folder to auto archive any e-mails older than 1 day.

Set it to move old items to the default archive.

5 Open the inbox and retrieve new e-mails from **Paul Smith** and **Angela Brown**.

Continued over ...

- 6 Read and reply to the e-mail from **Paul Smith** with the following response:

*Hi Paul*

*Unfortunately Joe is already busy that day, could you let me know another date which would be suitable for you? I will send you a hardcopy of Joe's calendar so you can find a suitable date.*

*Regards*

*<Student Name>*

*PA to the Marketing Manager*

Send the e-mail with **High Importance**.

Open the Calendar you saved earlier and print both months. Add your name and label it as **Printout 1**.

- 7 Read and reply to the e-mail from **Angela Brown**.

*Hi Angela*

*Joe is free then, so I will book a date into the company calendar and send you an invite to the appointment.*

*Regards*

*<Student Name>*

*PA to the Marketing Manager*

Send the reply.

Integrate the reply into your calendar and produce an appointment for the **date** and **time** specified.

Invite Angela Brown as an attendee and send the appointment.

Continued over...

- 8 Open a new blank e-mail to your assessor using stationary/themes. Add the following text:

*Hi*

*Please find attached all Evidence files produced during this assignment.*

*Regards*

*<Student Name>*  
*dd/mm/yyyy*

Send this e-mail and then print it, label it as **Printout 2**.

- 9 Close down the Outlook application and your PC.

When you have finished working:

- Sign each document above your name and label all removable storage media with your name.
- Hand all paperwork and removable storage media to your assessor.

If the assignment is taken over more than one period, all paperwork and removable media must be returned to the test supervisor at the end of each sitting.

### **End of assignment**



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