e-Quals Unit Syllabus

Electronic communication using Outlook

7266 – 031
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Rationale
The aim of this unit is to provide candidates with an intermediate level of skills and knowledge to competently prepare for, and perform a variety of communications related tasks using Information and Communication Technologies (ICT). Candidates will develop a more demanding understanding of the Microsoft Outlook application and the operating system in everyday usage and the ability to work in a generally unsupervised role solving issues competently without direction.

Learning outcomes
There are four outcomes to this unit. The candidate will be able to:

- Navigate and use Outlook facilities
- Use Outlook, on a network, to communicate
- Use the Outlook calendar
- Use contacts, tasks and notes

Guided learning hours
It is recommended that 60 hours should be allocated for this unit. This may be on a full time or part time basis.

Connections with other qualifications
This unit contributes towards the knowledge and understanding required for the following qualifications:

- N/SVQ in Customer Service, units 201, 202, 203, 204
- ICS Customer Service Technical Certificate, units 1.1, 1.2, 1.3, 1.4, 1.5, 1.6, 2.1, 2.4, 2.5, 2.7, 3.3, 3.4, 3.5

Assessment and grading
This unit will be assessed by an assignment covering practical skills.
Practical activities
The candidate will be able to:

1. open the Microsoft Outlook application
2. use application based Help resources
3. move/copy items between folders
4. navigate between components
5. modify the Master Categories list
6. assign items to a category
7. sort information using categories
8. use the clipboard
9. customise menu and taskbars
10. create directories/folders
11. sort e-mail
12. set viewing options
13. archive e-mail messages
14. delete e-mail messages
15. filter a view
16. create and use Office documents inside Outlook
17. Close the Outlook application correctly.
Unit 031  
Electronic communication using Outlook

Outcome 2  
Use Outlook, on a network, to communicate

**Practical activities**
The candidate will be able to:
1. read e-mail
2. send e-mail
3. compose e-mail by entering text
4. print e-mail
5. address e-mail by entering text
6. forward, reply and recall e-mail
7. use address book to address e-mail
8. flag e-mail messages
9. navigate within e-mail messages
10. find e-mail messages
11. configure basic e-mail print options
12. work with attachments
13. add a signature
14. customise the look of e-mail
15. use e-mail templates (themes) to compose e-mail
16. integrate and use e-mail with other components

**Underpinning knowledge**
The candidate will be able to:
1. explain the advantage of composing e-mail offline
2. explain the need to keep attachment files as small as possible
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Outcome 3  
Use the Outlook calendar

Practical activities
The candidate will be able to:

1. navigate within the calendar
2. schedule appointments and events
3. set reminders
4. print in calendar
5. schedule multiday events
6. configure calendar print options
7. customise the calendar view
8. schedule recurring appointments
9. add and remove meeting attendees
10. plan meetings involving others
11. save a personal or team calendar as a Web page
12. book office resources directly e.g. conference rooms
13. integrate calendar with other components.

Underpinning knowledge
The candidate will be able to:

1. describe the difference between an appointment and an event.
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Outcome 4  Use contacts, tasks and notes

Practical activities
The candidate will be able to:
1 create, edit and delete contacts
2 send contact information via e-mail
3 organise contacts by category
4 manually record an activity in a journal
5 link activities to a contact
6 sort contacts using fields
7 create and update one-time tasks
8 accept and decline tasks
9 organise tasks using categories
10 assign tasks to others
11 create tasks from other components
12 change the view for tasks
13 create and edit notes
14 organise and view notes
15 customise notes.

Underpinning knowledge
The candidate will be able to:
1 describe the purpose of notes.
Unit record sheet

Use this form to track your progress through this unit.

Tick the boxes when you have covered each outcome. When they are all ticked, you are ready to be assessed.

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Candidate Signature ______________________________________________ Date ________________________

City & Guilds Registration Number ________________________________________

Quality nominee (if sampled) __________________________________________ Date ________________________

Assessor Signature __________________________________________ Date ________________________

External Verifier Signature (if sampled) ______________________________ Date ________________________

Centre Name __________________________________________ Centre Number ________________________