

# Training Needs Analysis Form



## Introduction to Microsoft Outlook 2003/2007

**Name:** \_\_\_\_\_

**Position:** \_\_\_\_\_

**Organisation:** \_\_\_\_\_

**Software:** \_\_\_\_\_

Please place a tick in the relevant column to indicate whether you can do the following:

Task	Yes	No	Don't know
Identify the parts of the screen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Identify each folder in the folder list	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create an e-mail	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Save an unsent message	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use e-mail options	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Resend a message	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attach a file to a message	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Save and open attachments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mark messages as read or unread	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reply/forward e-mail	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Print a message	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Delete & retrieve a message	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Flag an outgoing &/or incoming message	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View flagged items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Remove a flag	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Find a message	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Colour code messages	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create&/or delete a folder	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Move messages to a folder	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use search folders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create a custom search folder	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Add a contact	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View contacts in different ways	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create a Distribution List	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create & send a V-Card	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create appointments & events in the calendar	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create recurring items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Organise & manage a meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create personal & delegate tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use the Outlook help system effectively	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# Training Needs Analysis Form



## Advanced Outlook 2003/2007

**Name:** \_\_\_\_\_

**Position:** \_\_\_\_\_

**Organisation:** \_\_\_\_\_

Please place a tick in the relevant column to indicate whether you can do the following:

Task	Yes	No	Not Sure
Assign tasks to Categories	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create an automatic signature	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use voting buttons in messages	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Track voting responses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create appointments & tasks from notes & e-mails	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assign a note to a contact	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use the Out of Office Assistant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create a custom reply template	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Set up a range of e-mail rules	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Export e-mail rules	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manage junk e-mail	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Share a folder	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understand folder permissions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Open a shared folder	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Change a range of default settings in Outlook	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understand Auto-Archive	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Export & import a PST file	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View & restore archived items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create a mail merge e-mail with Outlook contacts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create an e-mail template	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assign a template to a menu or toolbar	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create a rule to reply with a template	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use AutoFormat to assign items to categories	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understand best practice with e-mail management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
How to work more effectively in Outlook	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Troubleshoot a range of areas in Outlook	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>