Microsoft Outlook XP
Calendar

Student Manual

Prepared especially for:
Philadelphia Gas Works

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Introduction

Introduction

Purpose

The purpose of this course is to give comprehensive instruction on the use and features of the Calendar in Outlook XP. This course will cover introductory topics through advanced topics.

Prerequisite

Students taking this course should have a basic working knowledge of sending and receiving e-mails using Outlook XP. The **Outlook XP Introduction** course is recommended but not required.

Course Objectives

In this course, students will learn to:

- Understand the components of the calendar interface
- Create, edit, and delete appointments
- Create, edit, and delete events
- Schedule, respond to, update and cancel meetings
- Use color to organize a calendar
- Utilize group schedules to track other users' calendars
- Grant access to and share a calendar with other users
- Print a variety of calendar styles
- Customize the calendar interface and options

Chapter 1

Understanding Calendar Basics

Chapter Objectives:

- Understanding the Calendar Window
- Opening and Selecting Calendar Items
- Understand Calendar Item Definitions
- Working with the Calendar Toolbar
- Using the Date Navigator
- Accessing Calendar Views
- Using the Day View
- Using the Work Week View
- Using the Week View
- Using the Month View
- Accessing Other Calendar Views
- Using the Preview Pane
- Using the Reminders Window
- Changing the Time Bar
- Creating Other Calendar Folders

Chapter 1 – Understanding Calendar Basics

Overview

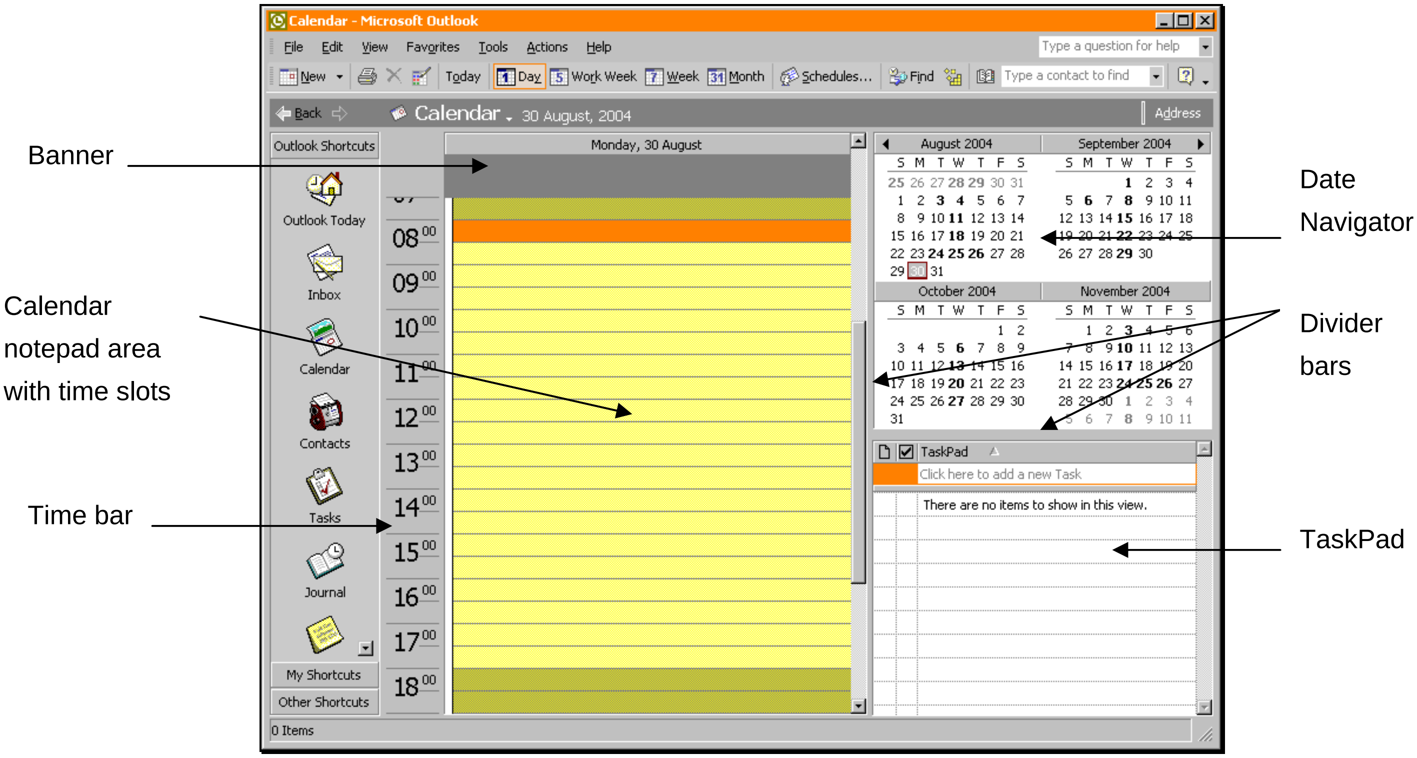
Outlook's **Calendar** allows for easy input of appointments, meetings, and events. Alarms or reminders can be set for these items to automatically alert the user with sounds and pop-up menus. The calendar also simplifies group scheduling by prompting users to send meeting requests and automating replies.

This chapter contains the basic information and procedures for understanding the various parts of the calendar window and terminology, using different calendar views, and creating additional calendars.

Understanding the Calendar Window

The **Calendar** window is made up of three primary areas that serve different purposes. They are the calendar notepad, Date Navigator, and the TaskPad (which is actually part of Outlook Tasks).

The following example describes the various parts of this window:



Banner
Calendar notepad area with time slots
Time bar
Date Navigator
Divider bars
TaskPad
Calendar - Microsoft Outlook
File Edit View Favorites Tools Actions Help
Type a question for help
New Today Day Work Week Week Month Schedules... Find
Type a contact to find
Back Calendar 30 August, 2004 Address
Outlook Shortcuts
Outlook Today
Inbox
Calendar
Contacts
Tasks
Journal
My Shortcuts
Other Shortcuts
Monday, 30 August
08 00 09 00 10 00 11 00 12 00 13 00 14 00 15 00 16 00 17 00 18 00
August 2004
September 2004
October 2004
November 2004
TaskPad
Click here to add a new Task
0 Items

There are no items to show in this view.

The amount of space the Date Navigator and/or the TaskPad take up in the Outlook interface can be controlled by dragging the gray divider bars.

Procedure:

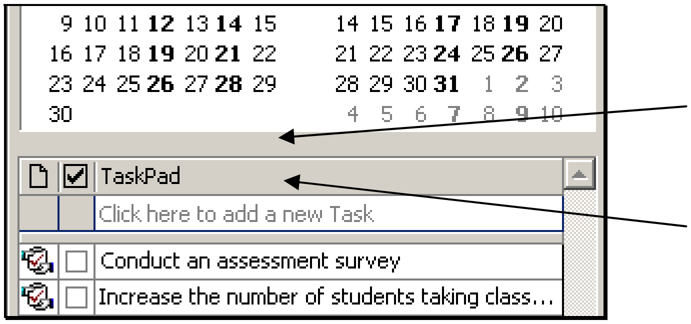
1. ⇹ Place the mouse over a divider bar until the sizing arrow displays.
2. Drag the divider to change the size of the area.

Tip:

- The **Date Navigator** and/or the **TaskPad** can be made to disappear by dragging the divider all the way to an edge of the Outlook window. For instance, dragging the gray divider all the way down will make the TaskPad disappear. To restore any section, grab the divider bar at the edge and drag it back to its original location.

Warning:

- When attempting to drag the horizontal divider bar, be careful not to grab any of the TaskPad fields by mistake, as these can also be dragged and removed.


9 10 11 12 13 14 15
16 17 18 19 20 21 22
23 24 25 26 27 28 29
30
14 15 16 17 18 19 20
21 22 23 24 25 26 27
28 29 30 31 1 2 3
4 5 6 7 8 9 10
TaskPad

Click here to add a new Task

☐ Conduct an assessment survey

☐ Increase the number of students taking class…

Drag here …

… NOT here

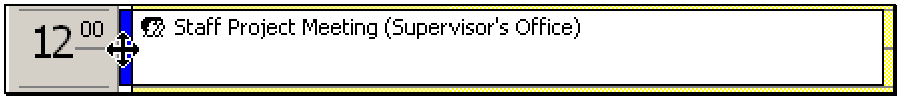
Opening and Selecting Calendar Items

Two terms that will be used extensively in this manual are **Select** and **Open**. While there is keyboard navigation available for the calendar, the graphical nature of the calendar makes it more convenient to use the mouse.

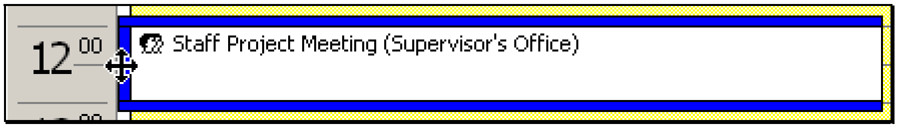
The following procedures describe the best methods for selecting and opening calendar items using the mouse as called for in this manual.

Procedure: (To select a calendar item)

1. Place the mouse on the left blue border of the item. The mouse pointer will change to a four-headed arrow.


12 00
Staff Project Meeting (Supervisor's Office)

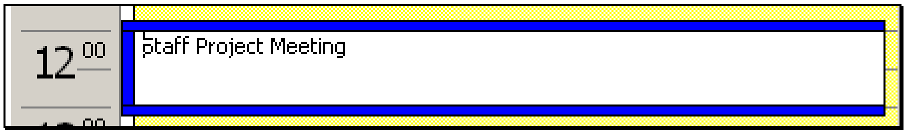
2. Click once with the left mouse button. A solid blue border will appear on the top and bottom of the item.


12 00
Staff Project Meeting (Supervisor's Office)

3. The item is now selected. Menu commands and other actions can now be performed.

Tip:

- When selecting a calendar item, It is important to single-click the left blue border, otherwise, Outlook will assume the user is trying to edit the text or subject of the item, and will go into edit mode for the item.


12 00
Staff Project Meeting

Calendar item in edit mode. Notice the location has disappeared and the cursor is visible at the left edge of the text.

Procedure: (To open a calendar item)

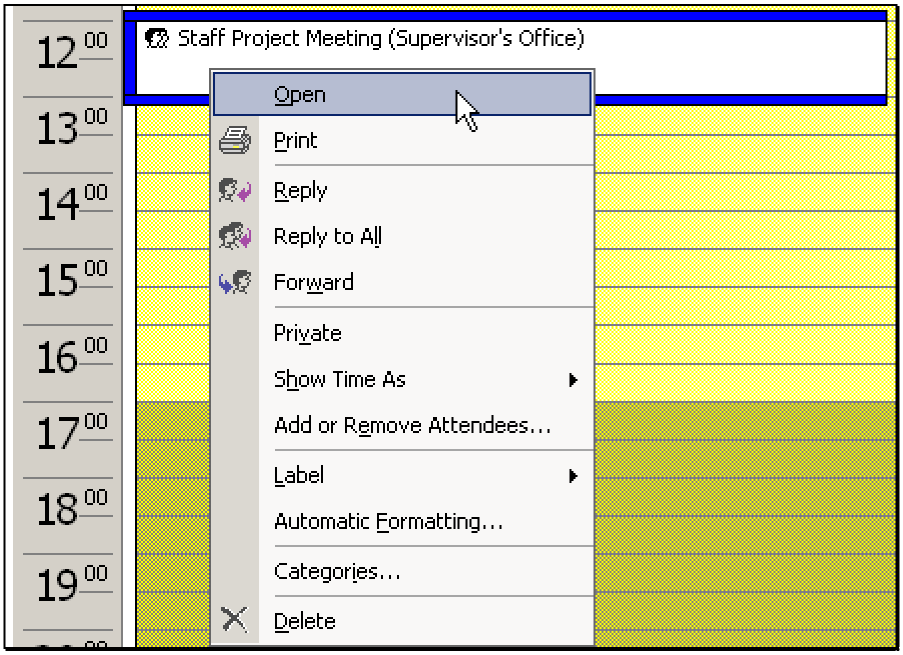
1. *Double*-click with the left mouse button anywhere on the item.

OR

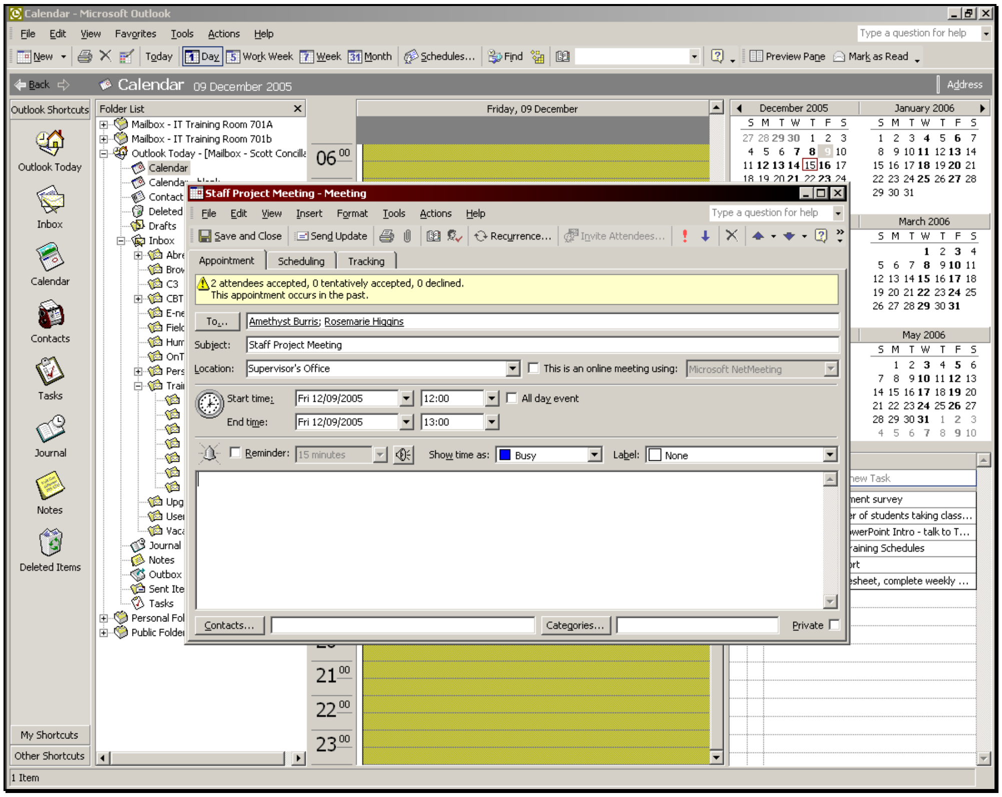
Click the left blue border of the item and select the **File** menu, choose **Open**, then **Selected Items**.

OR

Right-click with the mouse on the item and select **Open**.


12 00
13 00
14 00
15 00
16 00
17 00
18 00
19 00
Staff Project Meeting (Supervisor's Office)
Open
Print
Reply
Reply to All
Forward
Private
Show Time As
Add or Remove Attendees...
Label
Automatic Formatting...
Categories...
Delete

2. The item displays in a separate window.


Calendar - Microsoft Outlook
File Edit View Favorites Tools Actions Help
New Today Day Work Week Week Month Schedules... Find
Preview Page Mark as Read
Back Calendar 09 December 2005 Address
Outlook Shortcuts
Outlook Today
Inbox
Calendar
Contacts
Tasks
Journal
Notes
Deleted Items
My Shortcuts
Other Shortcuts
Folder List
Friday, 09 December
December 2005
January 2006
March 2006
May 2006
1 Item

Staff Project Meeting - Meeting

File Edit View Insert Format Tools Actions Help
Save and Close Send Update Recurrence... Invite Attendees...
Appointment Scheduling Tracking

2 attendees accepted, 0 tentatively accepted, 0 declined.
This appointment occurs in the past.

To...: Amethyst Burris; Rosemarie Higgins

Subject: Staff Project Meeting

Location: Supervisor's Office

☐ This is an online meeting using: Microsoft NetMeeting

Start time: Fri 12/09/2005 12:00 ☐ All day event

End time: Fri 12/09/2005 13:00

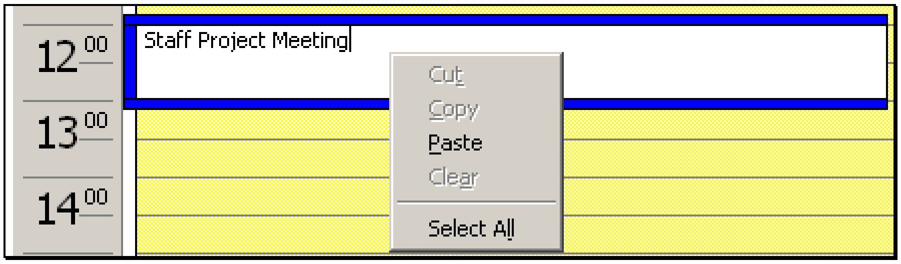
☐ Reminder: 15 minutes Show time as: Busy Label: None

Contacts... Categories... Private ☐

3. **Close** the item when all desired actions have been completed.

Tips:

- When using the *double*-click method, do not single-click the item before double-clicking it or the double-click will do nothing.
- When using the *right*-click method, do not single-click the item first, or Outlook will display the pop-up menu for editing an item.


12 00
13 00
14 00
Staff Project Meeting
Cut
Copy
Paste
Clear
Select All

The pop-up menu when item is in edit mode.

Chapter 1 – Understanding Calendar Basics

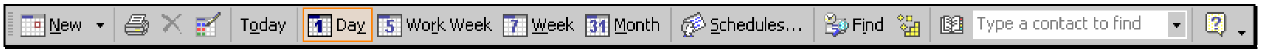
Understanding Calendar Item Definitions

There are several terms and definitions that are specific to working in the Outlook calendar. The calendar can contain three types of items: appointments, events, and meetings. These terms are defined in the following table:

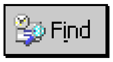
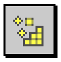
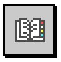
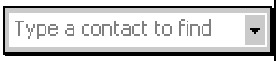
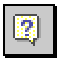
Term	Definition
Appointment	An activity that appears on the calendar that does not include other people or resources. Some examples of appointments include answering e-mail, writing a proposal, lunch with a colleague, or a visit to the dentist. Appointments can be marked as private, so that other users cannot view the detailed information about the activity.
Meeting	An item on the calendar that involves other people or resources and their Outlook calendars. A weekly review with the sales department is an example of a meeting. The current user can create meetings, or the user can be invited to meetings from other users.
Event	This activity does not necessarily block time on the calendar. Instead, the event appears as a banner at the top of the corresponding date(s). Some examples of events are trade shows, seminars, anniversaries, or birthdays. This category is also used when an appointment lasts longer than 24 hours.

Working with the Calendar Toolbar

The **Calendar** toolbar contains many of the commands and shortcuts to views that are needed to maneuver through this area of Outlook. The following table describes the buttons available on the standard **Calendar** toolbar.



Button	Name	Function
New	**New Appointment**	Inserts a new appointment into the user's calendar. When working in the calendar, **New Appointment** is the default command. Use the drop-down arrow to create a meeting request, task, new message, etc.
	Print	Prints the current calendar to the default printer with the default options.
	Delete	Deletes the selected item.
	Calendar Coloring	Assigns a background color and label name to the selected calendar item.
Today	**Today**	Displays the calendar for the current date.
1 Day	**Day**	Displays one day in the calendar notepad.
5 Work Week	**Work Week**	Displays the work week without weekends (as defined in the calendar options).
7 Week	**Week**	Displays one week, including weekends.
31 Month	**Month**	Displays one month at a time in the calendar notepad.
Schedules...	**Schedules**	Opens the **Group Schedules** dialog box.

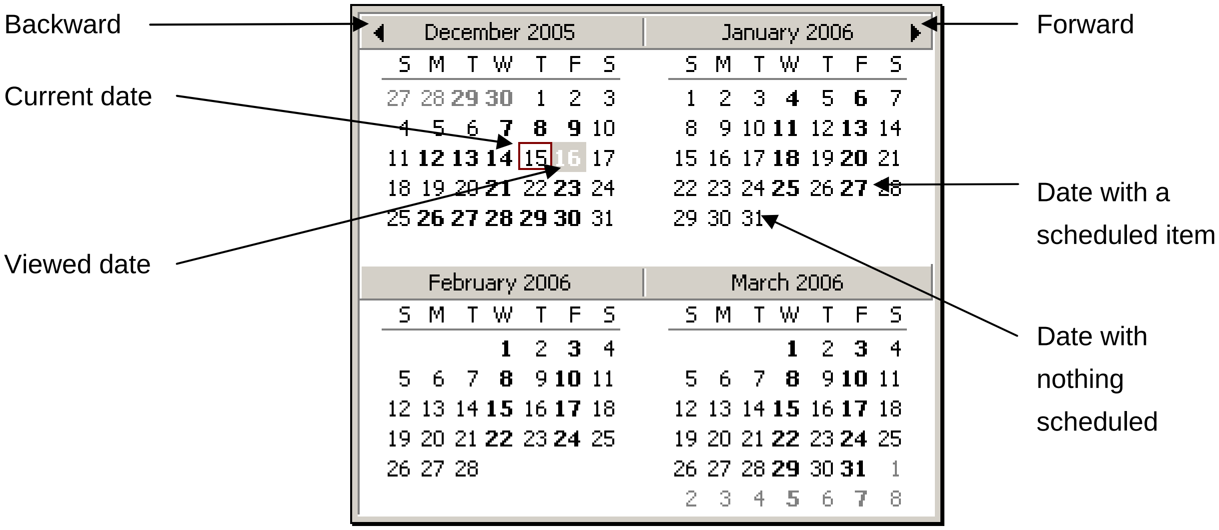
Button	Name	Function
	**Find**	Opens the **Find Bar** to search for items based on specified words or other criteria.
	**Organize**	Opens the **Organize Pane** to set options for categories and views.
	**Address Book**	Opens the **Address Book**.
	**Find a Contact**	Type the name of a contact in this box to have Outlook search for it, and then display the contact window.
	**Outlook Help**	Launches the Office Assistant on-line help.

Tips:

- When opened, the individual items in the calendar – appointments, events, and meetings – all have their own toolbars. A description of each of these toolbars can be found in **Appendix A**.
- For the sake of clarity in this manual, the **Standard** toolbar of the **Calendar** folder will be referred to as the **Calendar** toolbar.
- All other **Standard** item toolbars will be referred to as their respective window names, i.e. the **Appointment** toolbar, the **Meeting** toolbar, etc.

Using the Date Navigator

The **Date Navigator**, located in the upper right corner of the Outlook interface, allows the easy selection of any displayed date. It also shows important information about the calendar. The features of the Date Navigator are labeled and described below.



December 2005

S	M	T	W	T	F	S
27	28	**29**	**30**	1	2	3
4	5	6	**7**	**8**	**9**	10
11	**12**	**13**	**14**	15	**16**	17
18	19	20	**21**	22	**23**	24
25	**26**	**27**	**28**	**29**	**30**	31

January 2006

S	M	T	W	T	F	S
1	2	3	**4**	5	**6**	7
8	9	10	**11**	12	**13**	14
15	16	17	**18**	19	**20**	21
22	23	24	**25**	26	**27**	28
29	30	31				

February 2006

S	M	T	W	T	F	S
			1	2	**3**	4
5	6	7	**8**	9	**10**	11
12	13	14	**15**	16	**17**	18
19	20	21	**22**	23	**24**	25
26	27	28				

March 2006

S	M	T	W	T	F	S
			1	2	**3**	4
5	6	7	**8**	9	**10**	11
12	13	14	**15**	16	**17**	18
19	20	21	**22**	23	**24**	25
26	27	28	**29**	30	**31**	1
2	3	4	**5**	6	**7**	8

The **Forward** and **Backward** controls scroll the Date Navigator one month forward and backward respectively.

The **Current Date**, as determined by the workstation, will have a thin maroon border around it.

The **Viewed Date** is the date currently being viewed in the calendar. The date will appear in bold white print with gray shading. More than one date can be viewed at a time.

Dates with items that have a status of **Busy**, **Tentative**, or **Out of Office** will be in bold print. This can be changed in the view options of the calendar (see **Chapter 9 – Customizing the Calendar**).

The number of months shown in the Date Navigator can be changed by dragging the horizontal divider bar, as described earlier in this chapter.

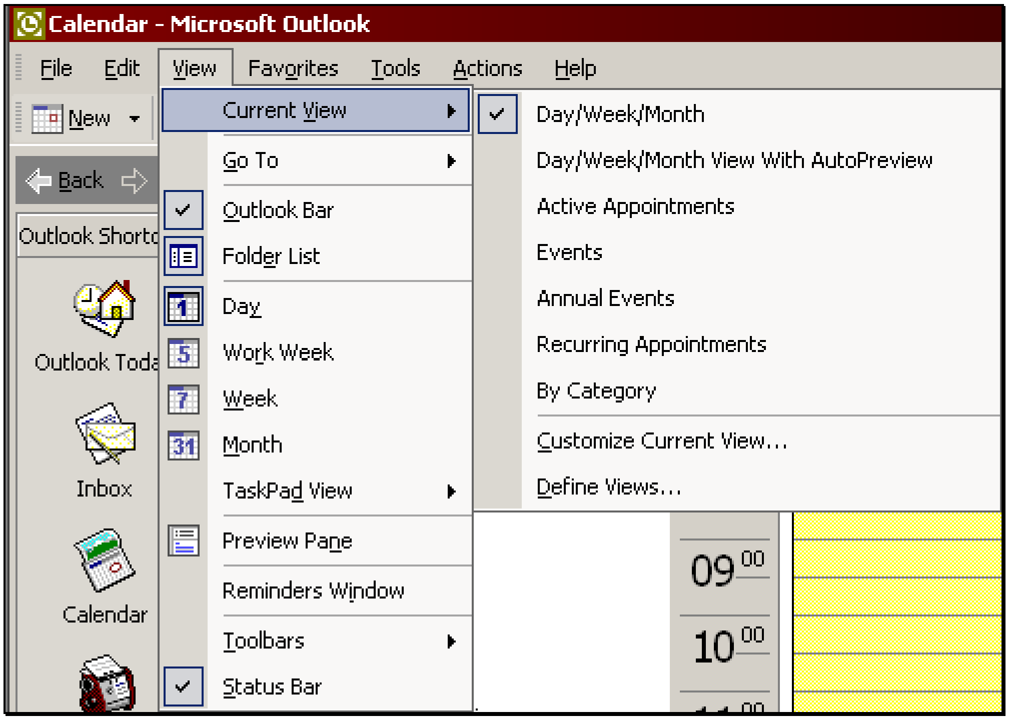
Accessing Calendar Views

There are many ways to view the calendar. The default view is called **Day/Week/Month**. This view contains four basic variations that can be accessed via the **Calendar** toolbar. These views are **Day**, **Work Week**, **Week**, or **Month**.

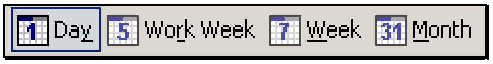
The following procedure describes how to access these calendar views. The following topics describe each view in detail.

Procedure:

1. Select the **View** menu, then **Current View**, and confirm that the **Day/Week/Month** view is selected. (A checkmark will appear next to the view name.)


Calendar - Microsoft Outlook
File
Edit
View
Favorites
Tools
Actions
Help
New
Back
Outlook Shortc
Outlook Toda
Inbox
Calendar
Current View
Go To
✓ Outlook Bar
Folder List
Day
Work Week
Week
Month
TaskPad View
Preview Pane
Reminders Window
Toolbars
✓ Status Bar
✓ Day/Week/Month
Day/Week/Month View With AutoPreview
Active Appointments
Events
Annual Events
Recurring Appointments
By Category
Customize Current View...
Define Views...
09 00
10 00

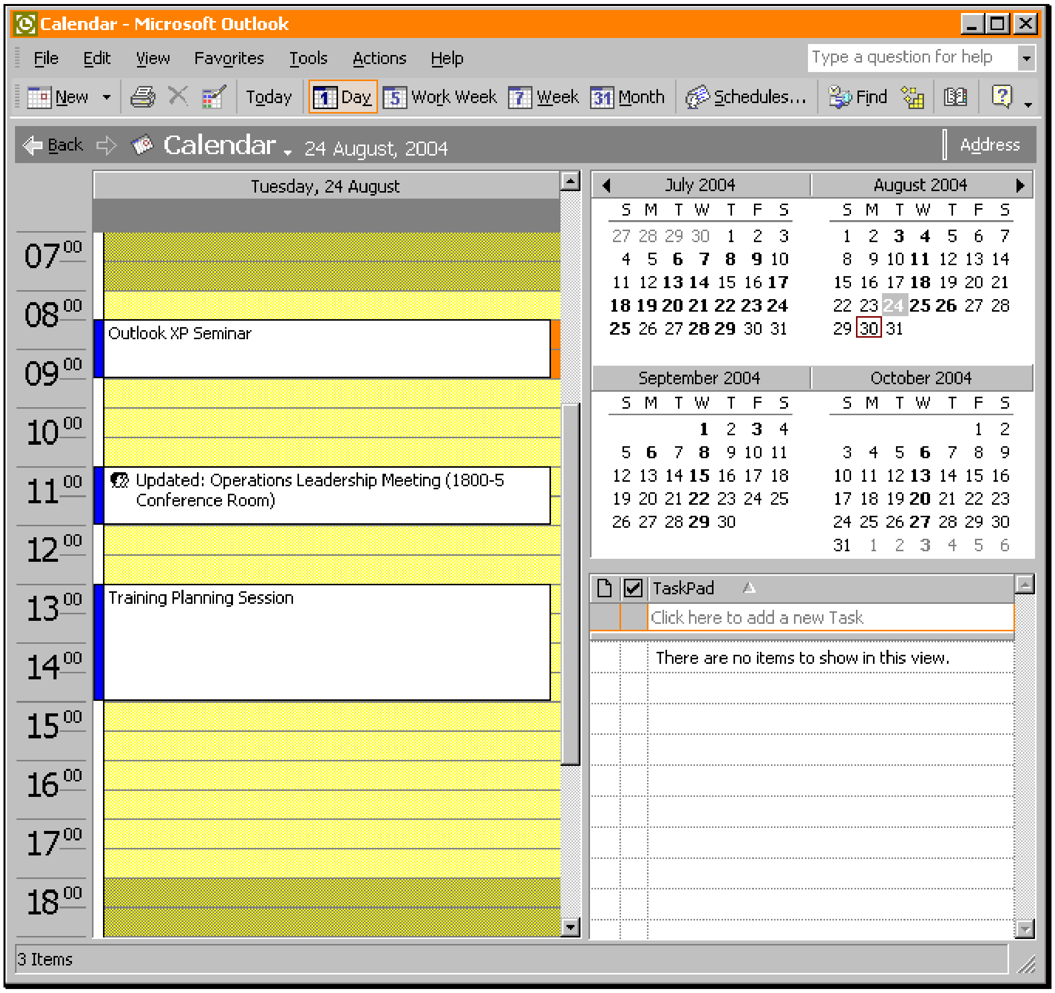
2. On the **Calendar** toolbar, click the desired view button.


1 Day
5 Work Week
7 Week
31 Month

Using the Day View

Day The **Day** view shows working hours in the designated background color (the default is yellow) and non-working hours in a shaded version of the background color.

The Date Navigator is located in the top-right corner and the TaskPad is below it. Days that have appointments or meetings scheduled will have the respective time periods blocked off in the calendar and the dates will be shown in bold in the Date Navigator.


Calendar - Microsoft Outlook
File Edit View Favorites Tools Actions Help
Type a question for help
New Today Day Work Week Week Month Schedules... Find
Back Calendar 24 August, 2004 Address
Tuesday, 24 August
07 00
08 00
09 00
10 00
11 00
12 00
13 00
14 00
15 00
16 00
17 00
18 00
TaskPad

Outlook XP Seminar

Updated: Operations Leadership Meeting (1800-5 Conference Room)

Training Planning Session

July 2004

S	M	T	W	T	F	S
27	28	29	30	1	2	3
4	5	**6**	**7**	**8**	**9**	10
11	12	**13**	**14**	15	16	**17**
18	**19**	**20**	**21**	**22**	**23**	**24**
25	26	27	**28**	**29**	30	31

August 2004

S	M	T	W	T	F	S
1	2	**3**	**4**	5	6	7
8	9	10	**11**	12	13	14
15	16	17	**18**	19	20	21
22	23	24	**25**	**26**	27	28
29	30	31				

September 2004

S	M	T	W	T	F	S
			1	2	**3**	4
5	**6**	7	**8**	9	10	11
12	13	14	**15**	16	17	18
19	20	21	**22**	23	24	25
26	27	28	**29**	30		

October 2004

S	M	T	W	T	F	S
					1	2
3	4	5	**6**	7	8	9
10	11	12	**13**	14	15	16
17	18	19	**20**	21	22	23
24	25	26	**27**	28	29	30
31	1	2	**3**	4	5	6

Click here to add a new Task

There are no items to show in this view.

3 Items

In addition to viewing just one day, Outlook allows the user to view several days at a time without switching to the Week view.

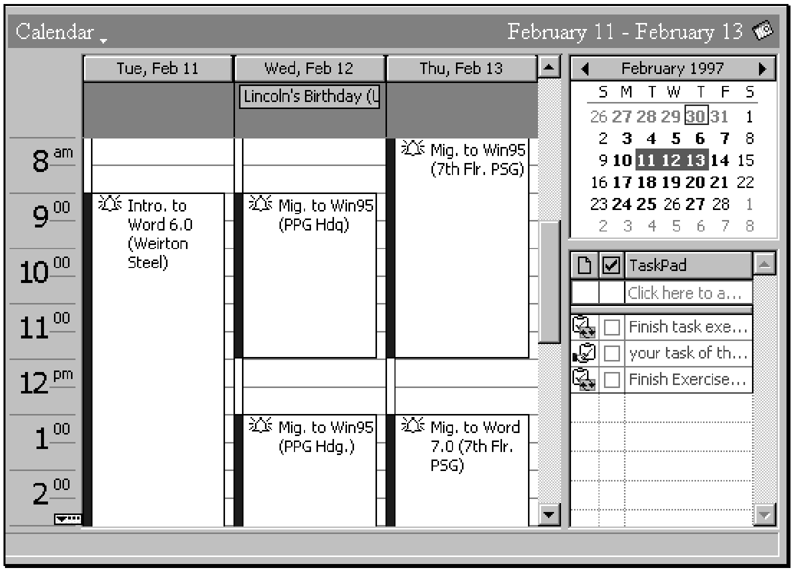
Procedure: (To view several days in a row)

1. In the **Date Navigator**, select the first day of the series. Hold down the **[Shift]** key and click the last day in the series.

OR

Drag over the days to be viewed in the **Date Navigator**.

2. Outlook displays the selected days in the main viewing area.

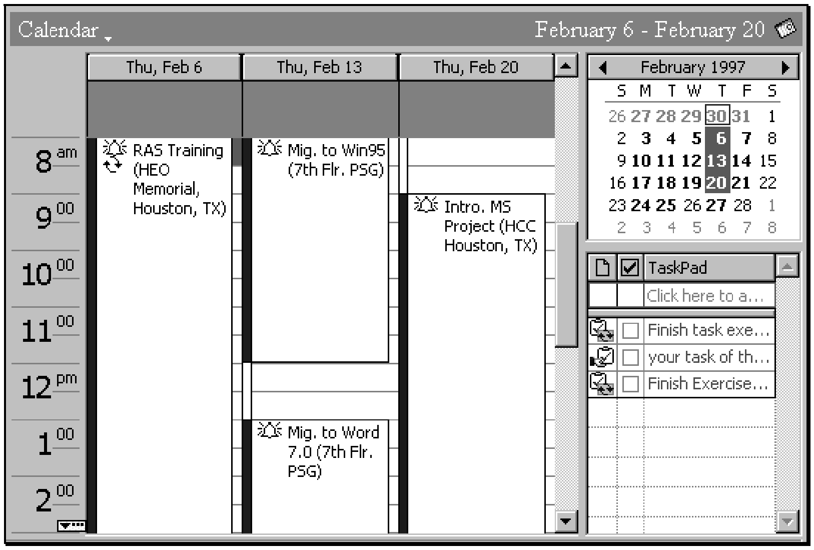

Calendar
February 11 - February 13
Tue, Feb 11
Wed, Feb 12
Thu, Feb 13
Lincoln's Birthday (U
8 am
9 00
10 00
11 00
12 pm
1 00
2 00
Intro. to Word 6.0 (Weirton Steel)
Mig. to Win95 (PPG Hdq)
Mig. to Win95 (7th Flr. PSG)
Mig. to Win95 (PPG Hdq.)
Mig. to Word 7.0 (7th Flr. PSG)
February 1997
S M T W T F S
26 27 28 29 30 31 1
2 3 4 5 6 7 8
9 10 11 12 13 14 15
16 17 18 19 20 21 22
23 24 25 26 27 28 1
2 3 4 5 6 7 8
TaskPad
Click here to a...
Finish task exe...
your task of th...
Finish Exercise...

Tip:

- When using the drag method to select days, Outlook will display up to six days in **Day** view. When dragging seven days or more, Outlook will switch to **Week** or **Month** view.
- When using the **[Shift]** method, up to 14 days can be shown in **Day** view.

Procedure: (To view non-consecutive days)

1. In the **Date Navigator**, select the first day.
2. Press and hold the **[Ctrl]** key and using the mouse, click the days to be viewed.
3. Outlook displays the selected days in the calendar notepad.


Calendar
February 6 - February 20
Thu, Feb 6
Thu, Feb 13
Thu, Feb 20
8 am
9 00
10 00
11 00
12 pm
1 00
2 00
RAS Training (HEO Memorial, Houston, TX)
Mig. to Win95 (7th Flr. PSG)
Intro. MS Project (HCC Houston, TX)
Mig. to Word 7.0 (7th Flr. PSG)
February 1997
S M T W T F S
26 27 28 29 30 31 1
2 3 4 5 6 7 8
9 10 11 12 13 14 15
16 17 18 19 20 21 22
23 24 25 26 27 28 1
2 3 4 5 6 7 8
TaskPad
Click here to a...
Finish task exe...
your task of th...
Finish Exercise...

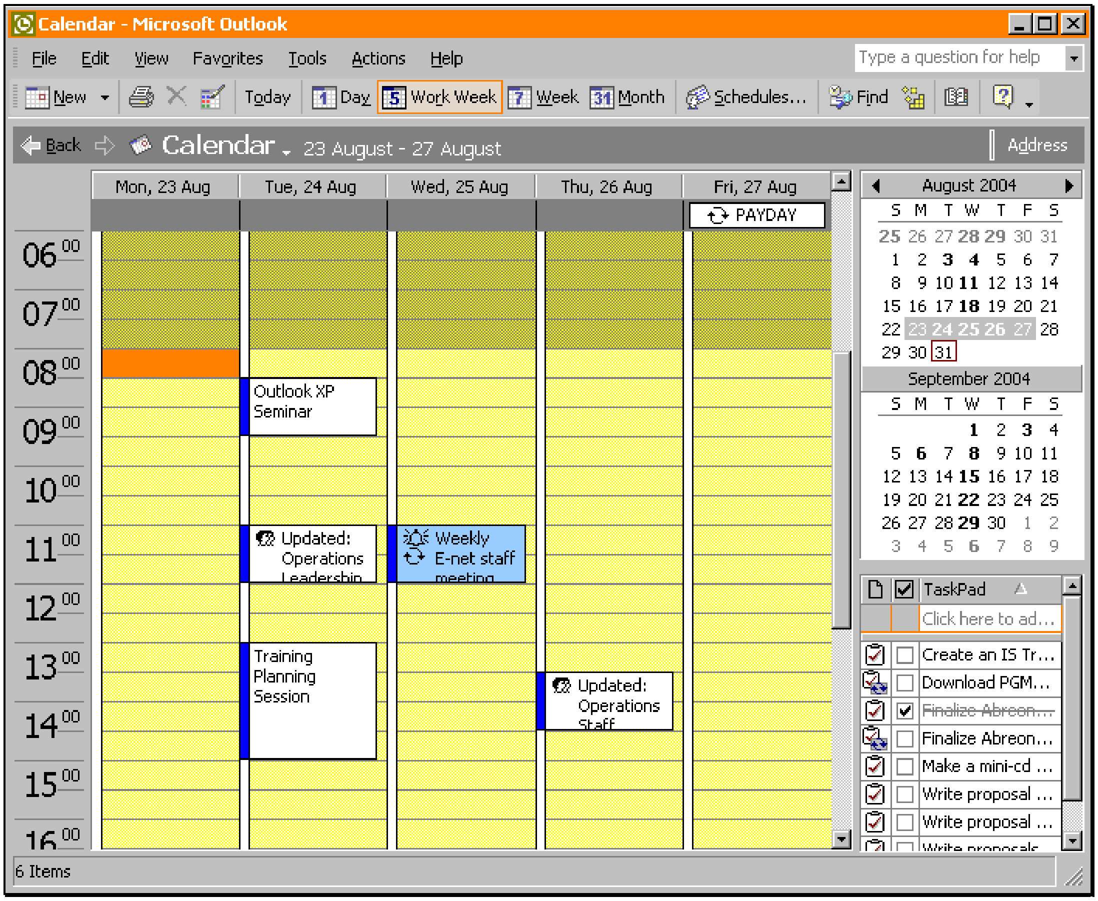
Warning:

- The maximum number of non-consecutive days that can be selected is 14.

Using the Work Week View

The **Work Week** view is basically **Day** view displaying the work days as defined in the calendar options. The default is Monday through Friday, without Sunday or Saturday.

All appointments, meetings, and any other scheduled items appear in an abbreviated manner. The TaskPad and Date Navigator are also available in this view.


Calendar - Microsoft Outlook
File Edit View Favorites Tools Actions Help
Type a question for help
New
Today
Day
Work Week
Week
Month
Schedules...
Find
Back
Calendar
23 August - 27 August
Address
August 2004
September 2004
TaskPad
Click here to ad...
6 Items

Mon, 23 Aug | Tue, 24 Aug | Wed, 25 Aug | Thu, 26 Aug | Fri, 27 Aug

Fri, 27 Aug: PAYDAY

Tue, 24 Aug, 08:30: Outlook XP Seminar

Tue, 24 Aug, 11:00: Updated: Operations Leadership

Wed, 25 Aug, 11:00: Weekly E-net staff meeting

Tue, 24 Aug, 13:00: Training Planning Session

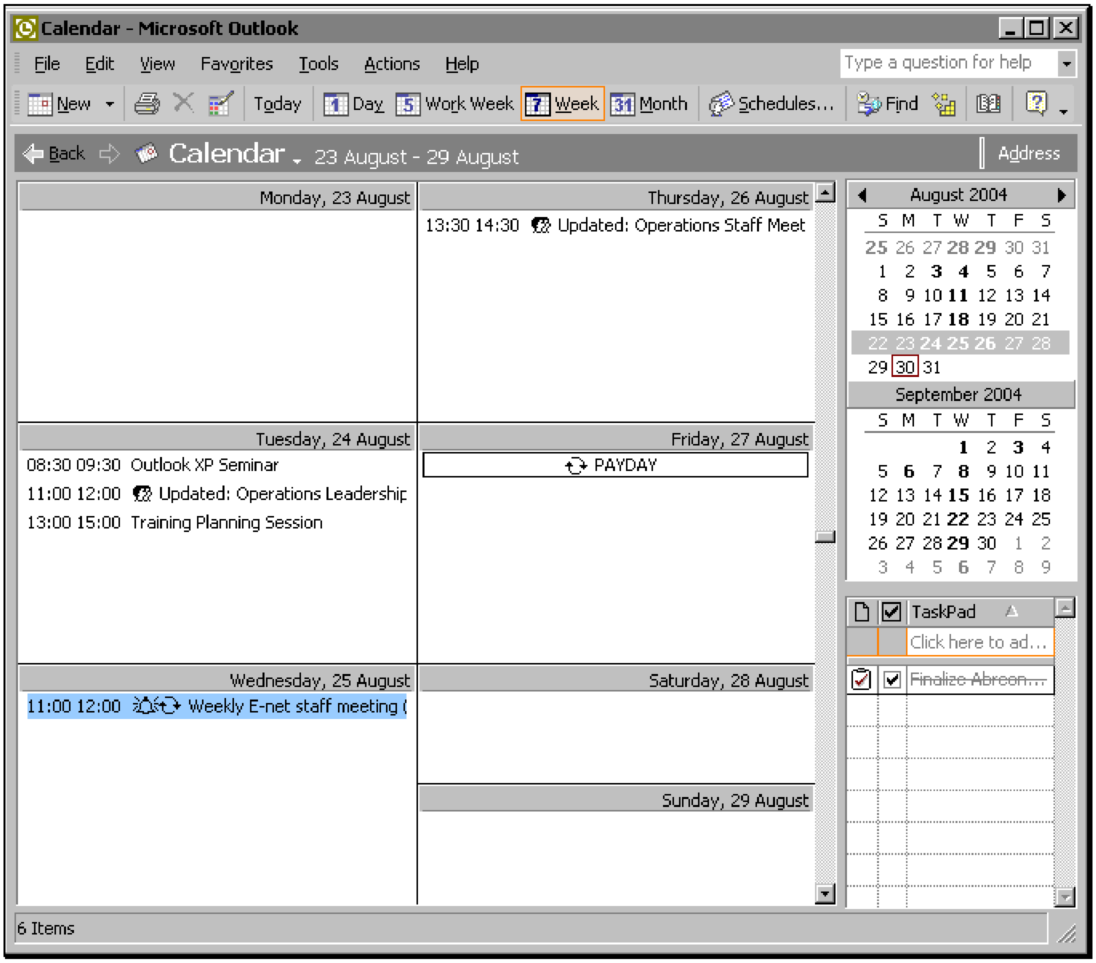
Thu, 26 Aug, 13:30: Updated: Operations Staff

TaskPad:
- ☐ Create an IS Tr...
- ☐ Download PGM...
- ☑ ~~Finalize Abreon...~~
- ☐ Finalize Abreon...
- ☐ Make a mini-cd ...
- ☐ Write proposal ...
- ☐ Write proposal ...
- ☐ Write proposals

Using the Week View

Week The **Week** view is a two-column display with the first half of the week in the first column and the second half of the week in the second column.

Similar to the **Day** view, the Date Navigator and the TaskPad remain visible. The current week is highlighted in the Date Navigator. The weekends are compressed into a single box.


Calendar - Microsoft Outlook
File Edit View Favorites Tools Actions Help
Type a question for help
New Today Day Work Week Week Month Schedules... Find
Back Calendar 23 August - 29 August
Address
August 2004
September 2004
TaskPad
Click here to ad...
~~Finalize Abreon...~~
6 Items

Monday, 23 August

Tuesday, 24 August
08:30 09:30 Outlook XP Seminar
11:00 12:00 Updated: Operations Leadership
13:00 15:00 Training Planning Session

Wednesday, 25 August
11:00 12:00 Weekly E-net staff meeting (

Thursday, 26 August
13:30 14:30 Updated: Operations Staff Meet

Friday, 27 August
PAYDAY

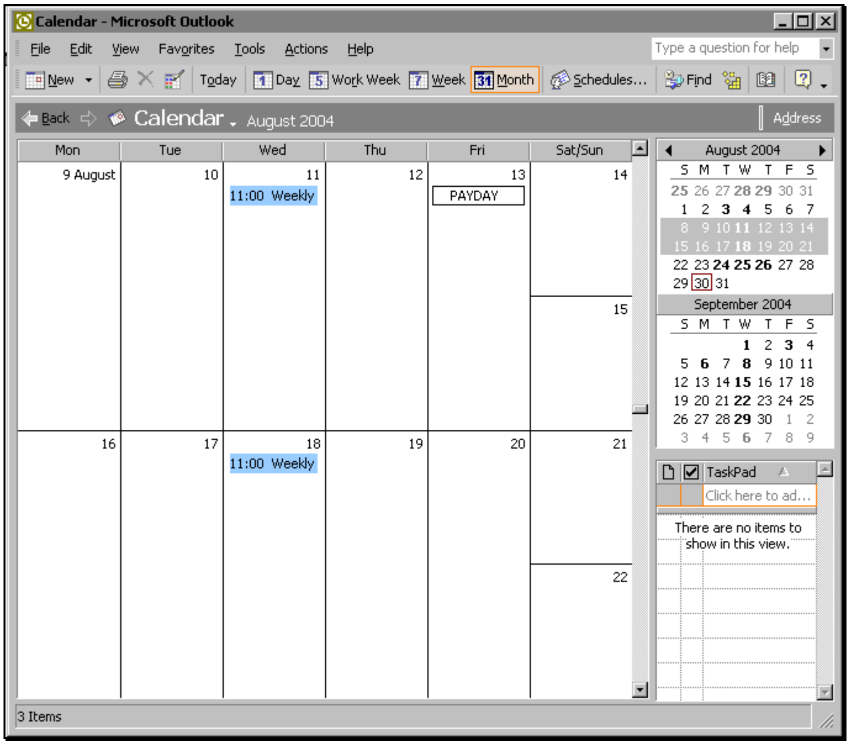
Saturday, 28 August

Sunday, 29 August

Use the following procedure to view more than one week in the **Week** view.

Procedure:

1. In the **Date Navigator**, drag over the weeks to be viewed.


Calendar - Microsoft Outlook
File Edit View Favorites Tools Actions Help
Type a question for help
New Today Day Work Week Week Month Schedules... Find
Back Calendar August 2004 Address
Mon Tue Wed Thu Fri Sat/Sun
9 August 10 11 12 13 14 15
11:00 Weekly
PAYDAY
16 17 18 19 20 21 22
11:00 Weekly
August 2004
September 2004
TaskPad
Click here to ad...
There are no items to show in this view.
3 Items

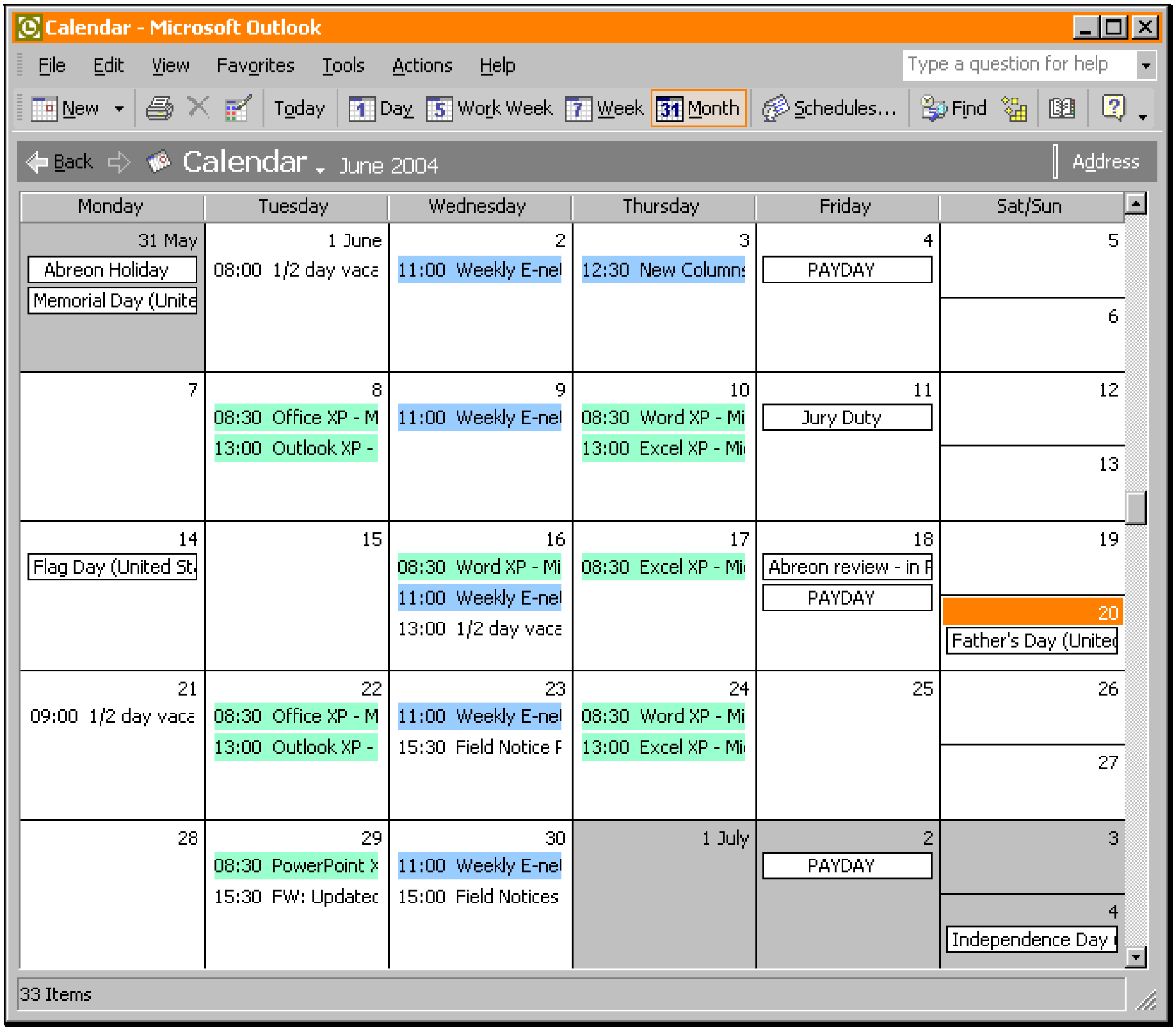
Warning:

- The maximum number of weeks that can be selected in this view is six.

Using the Month View

The **Month** view shows the desired month in its entirety. Months are distinguished by color, alternating between white and gray. The vertical scroll bar is used to navigate the months.

By default, the Date Navigator and TaskPad are not in this view.


Calendar - Microsoft Outlook
File
Edit
View
Favorites
Tools
Actions
Help
Type a question for help
New
Today
1 Day
5 Work Week
7 Week
31 Month
Schedules...
Find
Back
Calendar
June 2004
Address

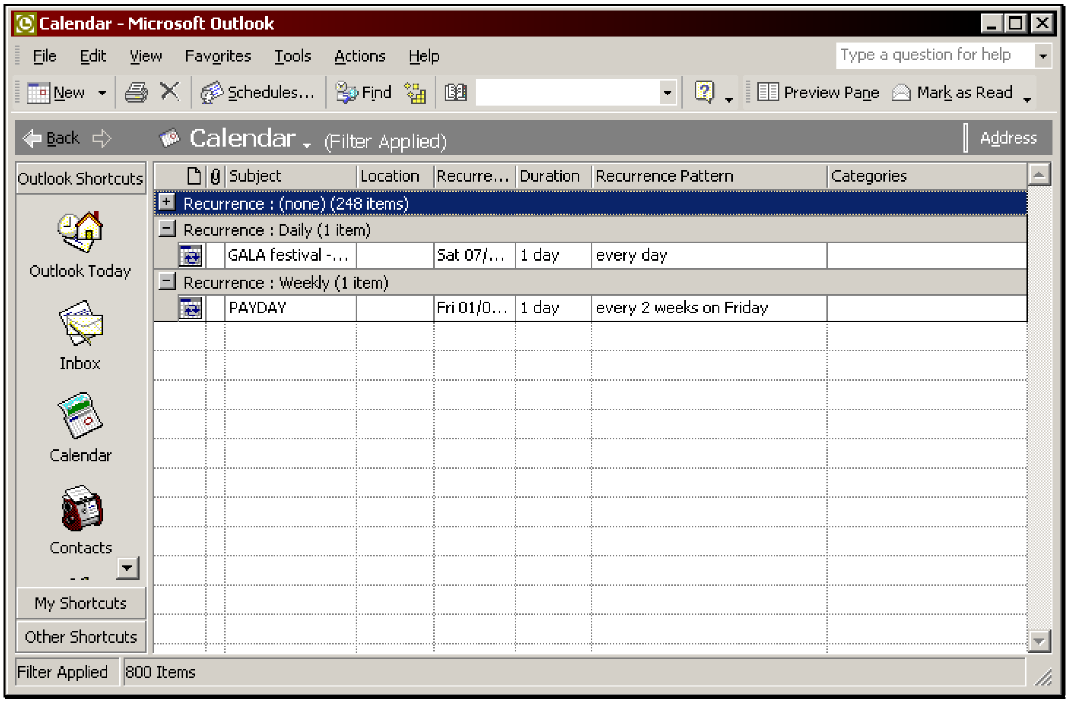
Monday	Tuesday	Wednesday	Thursday	Friday	Sat/Sun
31 May Abreon Holiday Memorial Day (Unite	1 June 08:00 1/2 day vaca	2 11:00 Weekly E-nel	3 12:30 New Column	4 PAYDAY	5 6
7	8 08:30 Office XP - M 13:00 Outlook XP -	9 11:00 Weekly E-nel	10 08:30 Word XP - Mi 13:00 Excel XP - Mi	11 Jury Duty	12 13
14 Flag Day (United St	15	16 08:30 Word XP - Mi 11:00 Weekly E-nel 13:00 1/2 day vaca	17 08:30 Excel XP - Mi	18 Abreon review - in F PAYDAY	19 20 Father's Day (United
21 09:00 1/2 day vaca	22 08:30 Office XP - M 13:00 Outlook XP -	23 11:00 Weekly E-nel 15:30 Field Notice F	24 08:30 Word XP - Mi 13:00 Excel XP - Mi	25	26 27
28	29 08:30 PowerPoint X 15:30 FW: Updatec	30 11:00 Weekly E-nel 15:00 Field Notices	1 July	2 PAYDAY	3 4 Independence Day (

33 Items

Weekends in **Month** view can be compressed so that more screen space is used by the work days (as shown above). This option can be changed in the **View** settings. This setting will also affect the appearance of weekends in **Week** view. See **Chapter 9 – Customizing the Calendar** for more information on setting calendar options.

Accessing Other Calendar Views

In addition to the calendar-style views, the calendar can be viewed in a table style, with columns and headings like an Excel spreadsheet. Table-style views can be handy for viewing appointments and meetings by groups, or for printing items in a table format.

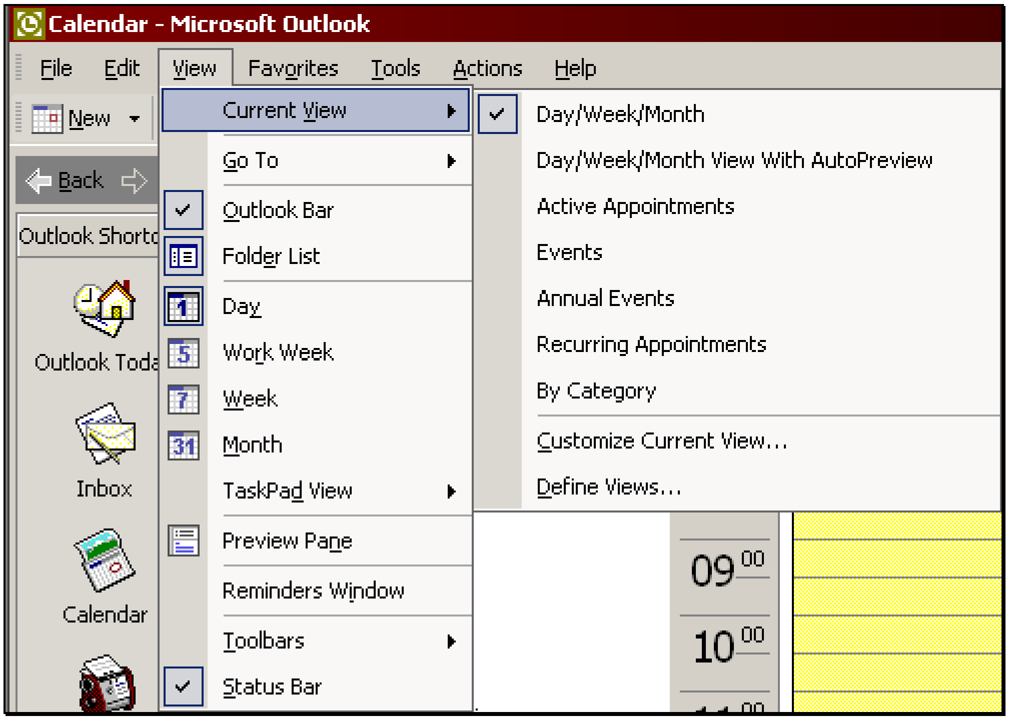

Calendar - Microsoft Outlook
File
Edit
View
Favorites
Tools
Actions
Help
Type a question for help
New
Schedules...
Find
Preview Pane
Mark as Read
Back
Calendar
(Filter Applied)
Address
Outlook Shortcuts
Outlook Today
Inbox
Calendar
Contacts
My Shortcuts
Other Shortcuts
Filter Applied
800 Items

Subject	Location	Recurre...	Duration	Recurrence Pattern	Categories
Recurrence : (none) (248 items)					
Recurrence : Daily (1 item)					
GALA festival -...		Sat 07/...	1 day	every day	
Recurrence : Weekly (1 item)					
PAYDAY		Fri 01/0...	1 day	every 2 weeks on Friday	

There are five table-style views built into the calendar. As with all Outlook views, they can be customized. See **Chapter 9 – Customizing the Calendar** for more information.

Procedure:

1. Select the **View** menu and choose **Current View**. A submenu of available views displays:


Calendar - Microsoft Outlook
File
Edit
View
Favorites
Tools
Actions
Help
New
Back
Outlook Shortc
Outlook Toda
Inbox
Calendar
Current View
Go To
Outlook Bar
Folder List
Day
Work Week
Week
Month
TaskPad View
Preview Pane
Reminders Window
Toolbars
Status Bar
Day/Week/Month
Day/Week/Month View With AutoPreview
Active Appointments
Events
Annual Events
Recurring Appointments
By Category
Customize Current View...
Define Views...
09 00
10 00

2. Using the following table, select one of the table-style views.

Option	Description
Active Appointments	Displays all appointments and meetings that start after the current date. The items are grouped by **Label**.
Events	Displays all events and groups them by recurrence pattern - None, Daily, Weekly, etc.
Annual Events	Displays all events that occur yearly. No grouping is applied in this view.
Recurring Appointments	Displays all currently active recurring appointments. Items are grouped by recurrence pattern - Daily, Weekly, Monthly, or Yearly.
By Category	Displays all types of calendar items – appointments, meetings, and events – both past, current, and future. Items are grouped by **Category**.

Using the Preview Pane

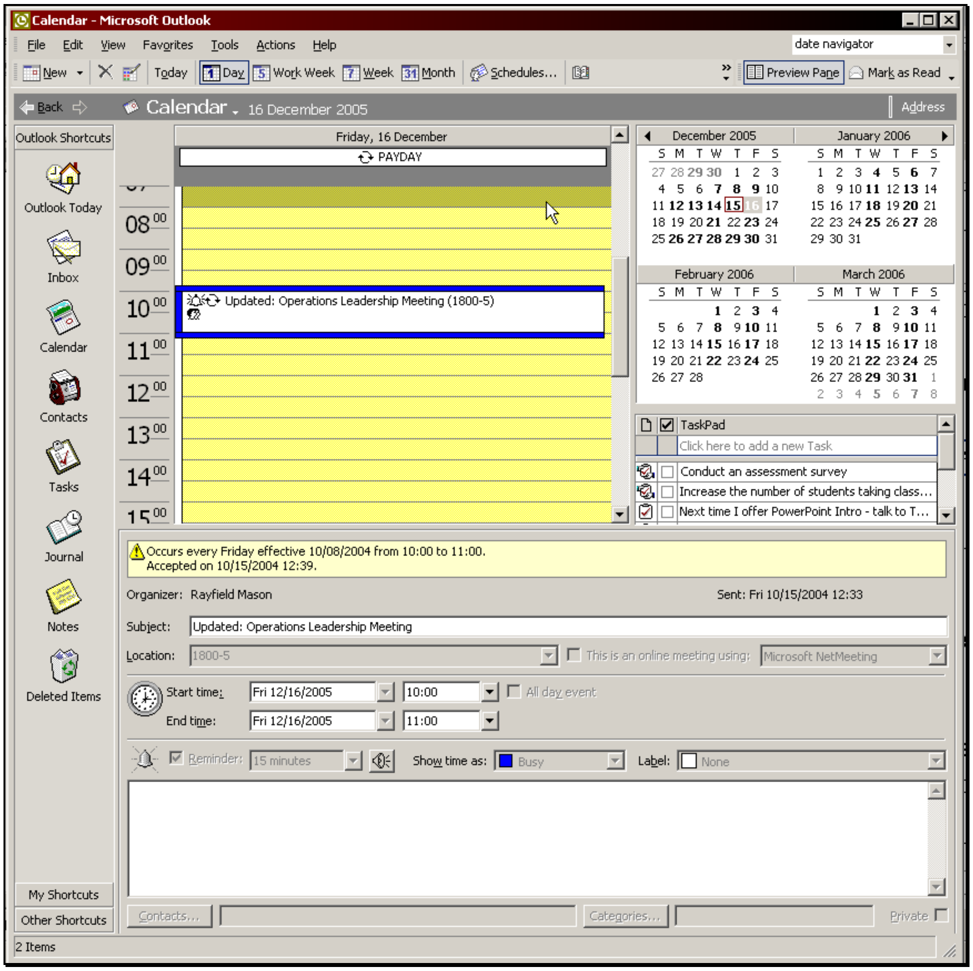
While it is used primarily in the Inbox for e-mails, Outlook XP extends the functionality of the **Preview Pane** to all Outlook items, including appointments, meetings, and events.

The Preview Pane allows the details of a calendar item to be viewed and edited without having to open the item as a separate window.

Procedure:

1. From the **Calendar** folder, select the **View** menu and choose **Preview Pane**.

2. **Select** an item in the calendar. The Preview Pane displays the details of the item:


Calendar - Microsoft Outlook
File Edit View Favorites Tools Actions Help
date navigator
New Today Day Work Week Week Month Schedules...
Preview Pane Mark as Read
Back Calendar 16 December 2005 Address
Outlook Shortcuts
Outlook Today
Inbox
Calendar
Contacts
Tasks
Journal
Notes
Deleted Items
My Shortcuts
Other Shortcuts
Friday, 16 December
08 00
09 00
10 00
11 00
12 00
13 00
14 00
15 00
December 2005
January 2006
February 2006
March 2006
TaskPad
Contacts...
Categories...
Private
2 Items

PAYDAY

Updated: Operations Leadership Meeting (1800-5)

Click here to add a new Task

☐ Conduct an assessment survey

☐ Increase the number of students taking class…

☐ Next time I offer PowerPoint Intro - talk to T…

Occurs every Friday effective 10/08/2004 from 10:00 to 11:00.
Accepted on 10/15/2004 12:39.

Organizer: Rayfield Mason

Sent: Fri 10/15/2004 12:33

Subject: Updated: Operations Leadership Meeting

Location: 1800-5

☐ This is an online meeting using: Microsoft NetMeeting

Start time: Fri 12/16/2005 10:00

End time: Fri 12/16/2005 11:00

☐ All day event

☑ Reminder: 15 minutes

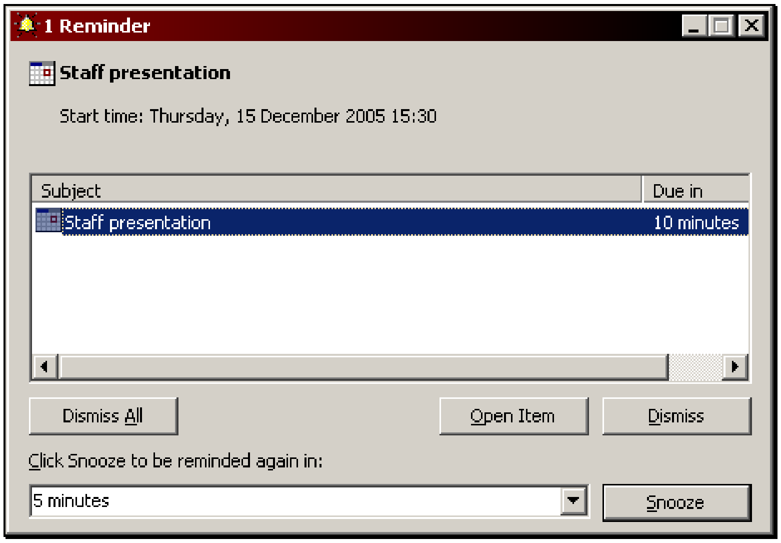
Show time as: Busy

Label: None

Using the Reminders Window

In previous versions of Outlook, reminders had to be processed one at a time, that is, there was a separate reminder window for every reminder. If a user was out of the office for a while, there could be dozens of reminders to deal with upon return.

Outlook XP provides a unified reminders window that presents all reminders in a single window, making it much easier to dismiss or snooze groups of reminders.



Staff presentation

Start time: Thursday, 15 December 2005 15:30

Subject	Due in
Staff presentation	10 minutes

Click Snooze to be reminded again in:

5 minutes

The following table describes the buttons available in this window:

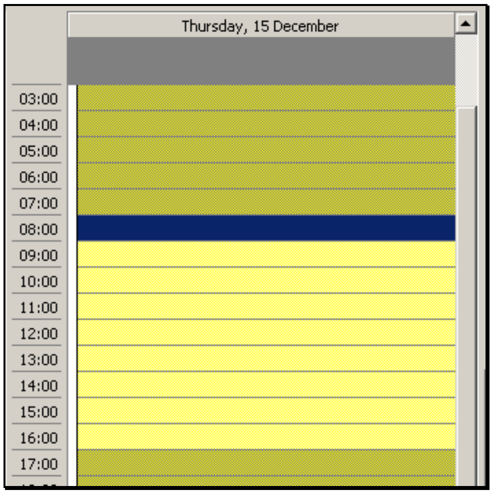
Button	Description
Dismiss All	Dismisses all reminders displayed in the reminders window. If chosen, Outlook will ask to confirm this action.
Open Item	Opens a separate window with the selected item displayed.
Dismiss	Dismisses the reminder currently selected in the list.
Snooze	In combination with the snooze drop-down list, this button temporarily dismisses the reminder and will redisplay it at the designated interval.

The **Reminders** window can also be displayed manually by selecting the **View** menu and choosing **Reminders Window**.

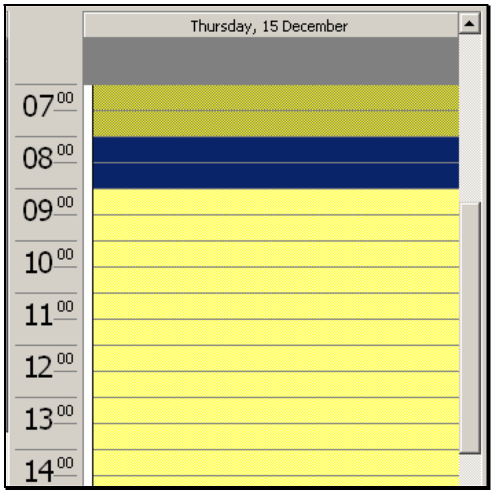
Changing the Time Bar

Along the left side of the calendar notepad is the **Time Bar**. The Time Bar displays 30-minute increments by default, however it can be set to display one of six different time increments – 60, 30, 15, 10, 6, or 5 minutes.

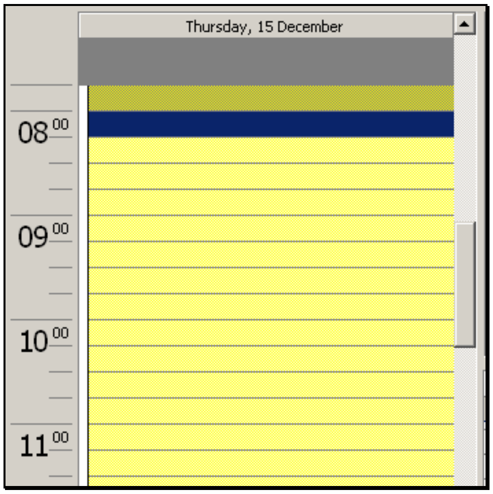
Outlook keeps the height of each increment row constant, therefore a day divided up into 60-minute increments will be “shorter” (i.e. less scrolling), than one divided up into 10-minute increments.


Thursday, 15 December
03:00
04:00
05:00
06:00
07:00
08:00
09:00
10:00
11:00
12:00
13:00
14:00
15:00
16:00
17:00

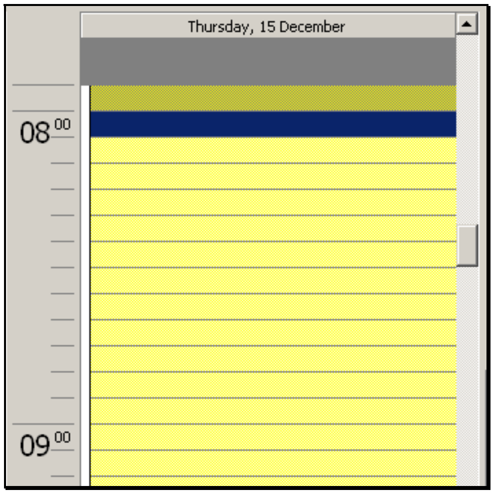
60-minute increments


Thursday, 15 December
07 00
08 00
09 00
10 00
11 00
12 00
13 00
14 00

30-minute increments


Thursday, 15 December
08 00
09 00
10 00
11 00

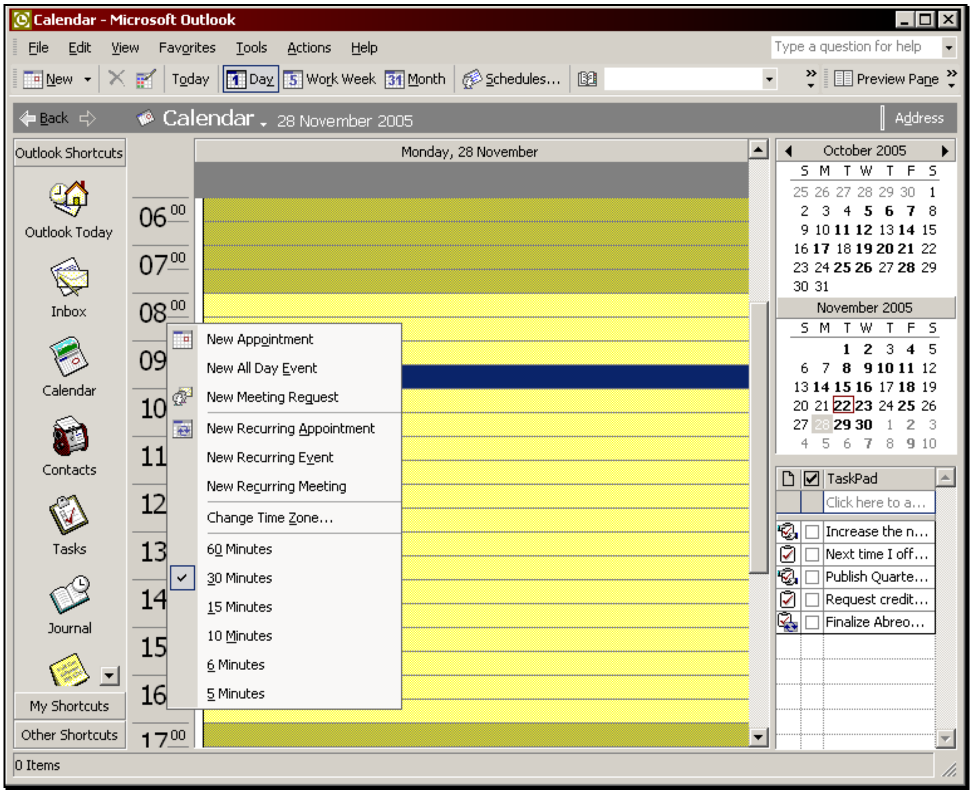
15-minute increments


Thursday, 15 December
08 00
09 00

5-minute increments

Procedure:

1. *Right*-click the **Time Bar** in the calendar. The pop-up menu displays:


Calendar - Microsoft Outlook
File Edit View Favorites Tools Actions Help
Type a question for help
New Today Day Work Week Month Schedules… Preview Pane
Back Calendar 28 November 2005 Address
Outlook Shortcuts
Outlook Today
Inbox
Calendar
Contacts
Tasks
Journal
My Shortcuts
Other Shortcuts
Monday, 28 November
06 00
07 00
08 00
09
10
11
12
13
14
15
16
17 00
New Appointment
New All Day Event
New Meeting Request
New Recurring Appointment
New Recurring Event
New Recurring Meeting
Change Time Zone…
60 Minutes
✓ 30 Minutes
15 Minutes
10 Minutes
6 Minutes
5 Minutes
October 2005
November 2005
TaskPad
Click here to a…
Increase the n…
Next time I off…
Publish Quarte…
Request credit…
Finalize Abreo…
0 Items

2. Select the desired time increment with the left mouse button.

Tip:

- The Time Bar can also be changed in the **View** settings. See **Chapter 9 – Customizing the Calendar** for more information.

Creating Other Calendar Folders

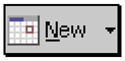
In same manner that folders can be created to sort and file e-mails, additional calendar folders may be created for a variety of different projects and tasks.

However, only the original default Outlook calendar can be shared with other users (see **Chapter 7 – Sharing Calendars**) and be used for scheduling meetings (see **Chapter 4 – Working with Meetings**).

Procedure:

1. Select the **File** menu, choose **New,** then **Folder**.

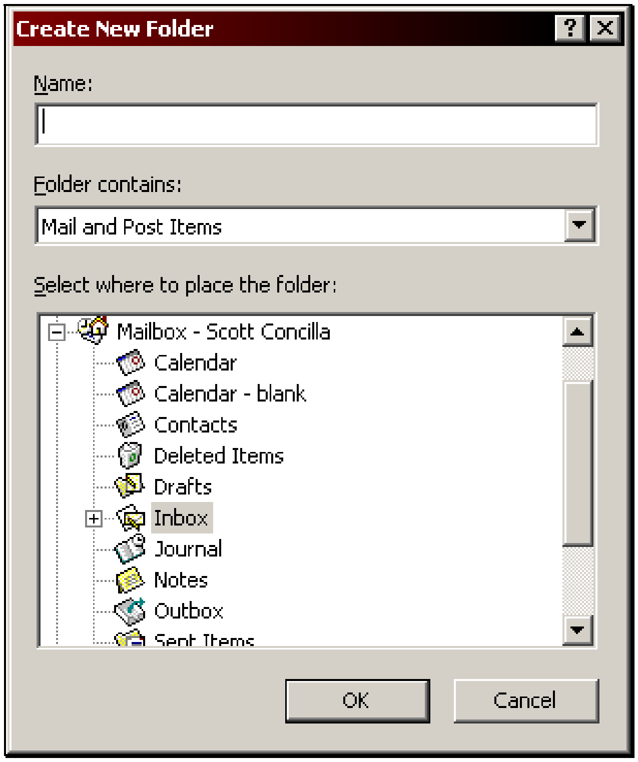
OR



Click the drop-down arrow of the **New** button on the **Calendar** toolbar and select **Folder**.

OR

Press **[Ctrl]** + **[Shift]** + **[E]**. The **Create New Folder** dialog box displays:


Create New Folder

Name:

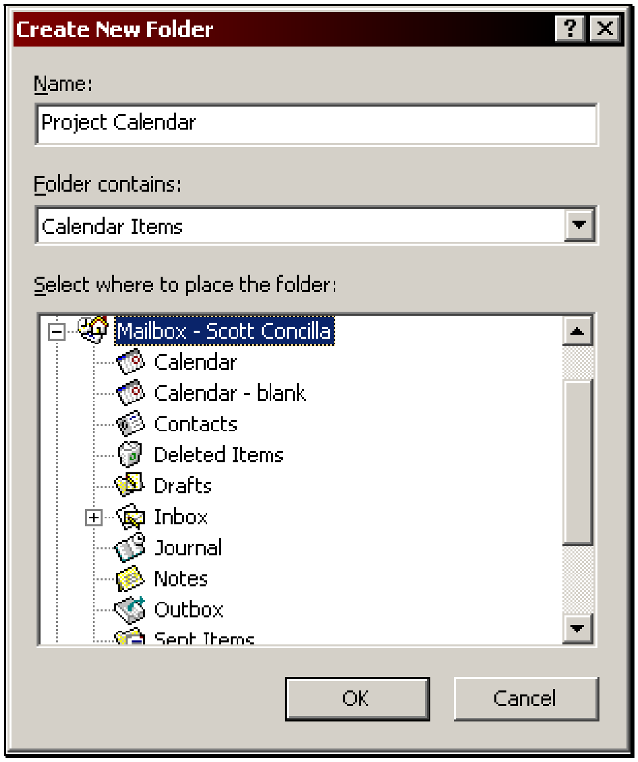
Folder contains: Mail and Post Items

Select where to place the folder:
Mailbox - Scott Concilla
Calendar
Calendar - blank
Contacts
Deleted Items
Drafts
Inbox
Journal
Notes
Outbox
Sent Items
OK
Cancel

2. Type a **Name** for the calendar.

3. From the **Folder contains** drop-down list choose **Calendar Items**.

4. In the **Select where to place the folder** section, select the folder above where the calendar should appear. (The *Mailbox – <username>* folder is recommended.)



Create New Folder

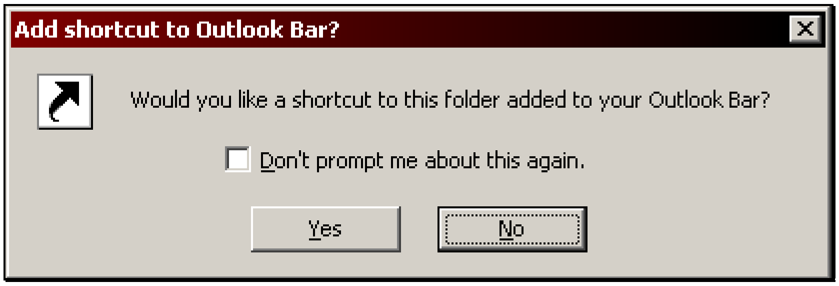
Name: Project Calendar

Folder contains: Calendar Items

Select where to place the folder:

Mailbox - Scott Concilla
Calendar
Calendar - blank
Contacts
Deleted Items
Drafts
Inbox
Journal
Notes
Outbox
Sent Items
OK
Cancel

5. Click **OK** to create the calendar. The following dialog box displays:



Add shortcut to Outlook Bar?

Would you like a shortcut to this folder added to your Outlook Bar?

☐ Don't prompt me about this again.

6. To create a shortcut on the Outlook Bar, click **Yes**. Otherwise, click **No**.

7. The newly created calendar now appears in the folder list.

Chapter 2

Working with Appointments

Chapter Objectives:

- Creating a New Appointment
- Editing an Appointment
- Deleting an Appointment
- Creating a Recurring Appointment
- Editing a Recurring Appointment
- Deleting a Recurring Appointment

Chapter 2 – Working with Appointments

Overview

Appointments are the most common type of item added to a calendar. As defined in the previous chapter, an appointment is an activity that appears on the calendar that does not include other people or resources.

Appointments can either be created as single occurrences, such as a doctor's appointment, or recurring appointments can be created for multiple occurrences that happen on a regular basis.

Creating a New Appointment

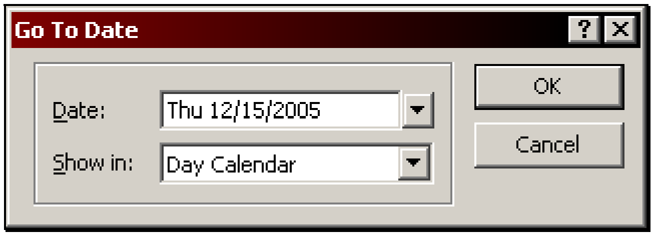
An appointment is an activity that does not involve other users or resources. For instance, a doctor's appointment, a training class, or reserving time to work on a project are all examples of appointments. There are several methods to start the creation of an appointment.

Procedure:

1. Choose the day for the appointment using the **Date Navigator**.

OR

Press **[Ctrl]** + **[G]** to display the **Go To Date** dialog box. Use the drop-down box to select a date and click **OK**.



Date: Thu 12/15/2005
Show in: Day Calendar

2. Choose the desired time slot. Click once with the mouse to select a single time slot, or drag over multiple time slots to select a longer period.
3. If one time slot is selected, *double*-click the time slot.

OR

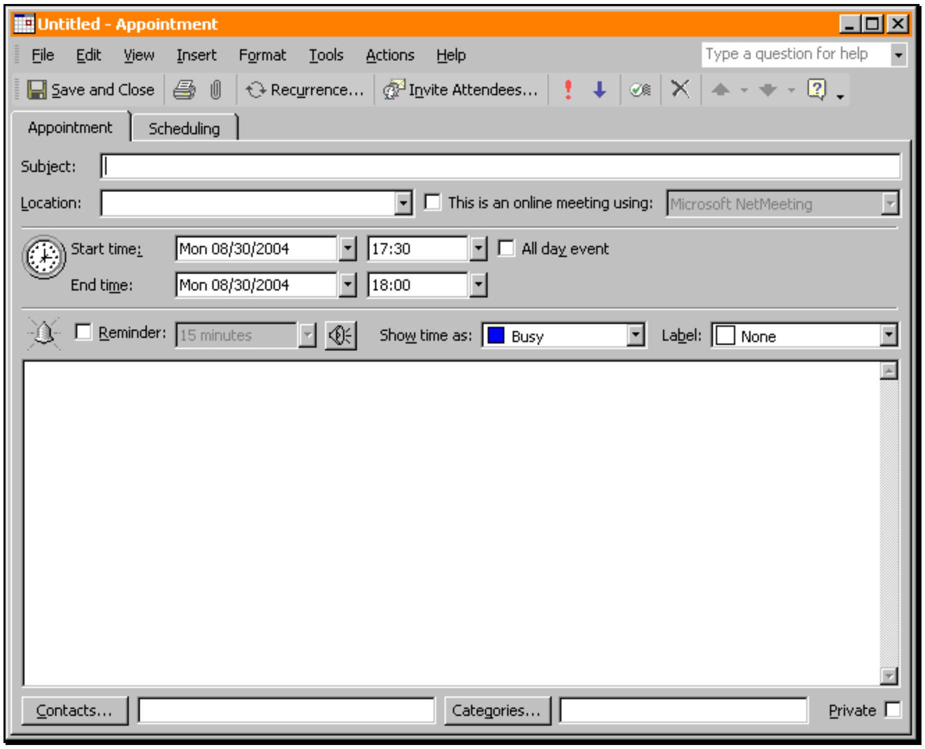
Right-click the highlighted time block and choose **New Appointment**.

OR

Click the **New** button on the **Calendar** toolbar.

OR

Press **[Ctrl]** + **[N]**. The **Appointment** window displays:


Untitled - Appointment
File Edit View Insert Format Tools Actions Help
Type a question for help
Save and Close
Recurrence...
Invite Attendees...
Appointment
Scheduling
Subject:
Location:
Contacts...
Categories...
Private

☐ This is an online meeting using: Microsoft NetMeeting

Start time: Mon 08/30/2004 17:30 ☐ All day event

End time: Mon 08/30/2004 18:00

☐ Reminder: 15 minutes

Show time as: Busy

Label: None

4. Use the following table to complete the fields in the **Appointment** window.

Option	Description
Subject	Type a descriptive name or title for the appointment. The title bar of the appointment will change to match the subject.
Location	Enter the location of the appointment, or select a previously used location from the drop-down list. **Note:** This does NOT schedule or reserve a conference room or resource.
This is an online meeting	This option is for use with meetings. (Do not use at PGW.)
Start time	Type or use the drop-down boxes to enter the beginning date and time for the appointment.

Option	Description
All day event	Select the check box to make the appointment an event. (See **Chapter 3 – Working with Events** for more about events.)
End time	Type or use the drop-down boxes to enter the ending date and time for the appointment.
Reminder	Select this check box to set a reminder and use the corresponding drop-down list to select or type the amount of time prior to the appointment for the reminder to appear.
Play a sound	Select this button to choose the sound file to be played when the reminder appears.
Show time as	Choose **Free**, **Tentative**, **Busy**, or **Out of Office** from the drop-down list. This changes the appearance of available time when others view your schedule. The default for appointments is **Busy**.
Label	Select a label (calendar coloring) for the appointment.
Notes	Type any additional details about the appointment in this area. This area is also used to insert or attach a file, such as an agenda. Use the **Insert**, **File** menu command, or the **Insert File** button on the **Appointment** toolbar.
Contacts	Select this option to associate this appointment with members of the Contacts folder.
Categories	Select this option to place this appointment into a category.
Private	Select this check box so that the details of the appointment are hidden from others who have access to your schedule, i.e. your delegates or others who have read permission to your calendar.

5.
Save and Close
Click the **Save and Close** button on the **Appointment** toolbar to save the appointment and place it on the calendar.

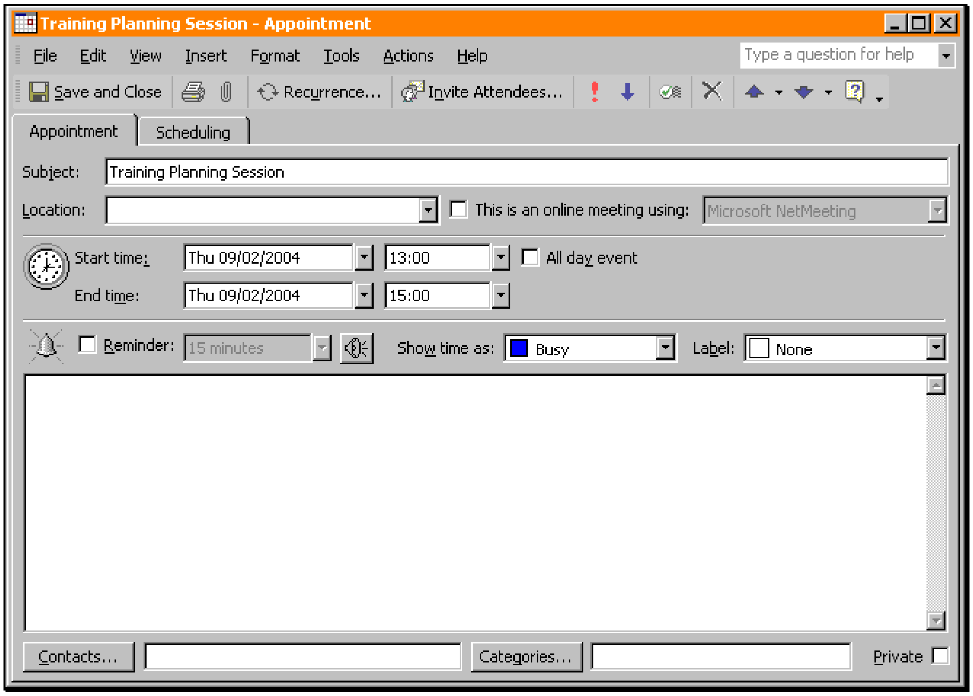
Chapter 2 – Working with Appointments

Editing an Appointment

Once an appointment has been created and added to the calendar, it may be necessary to modify the information in the appointment.

Procedure:

1. **Open** the appointment to be edited. The **Appointment** window displays:


File
Edit
View
Insert
Format
Tools
Actions
Help
Type a question for help
Save and Close
Recurrence...
Invite Attendees...
Appointment
Scheduling
☐ This is an online meeting using:
☐ All day event
Contacts...
Categories...
Private ☐

Training Planning Session - Appointment

Subject: Training Planning Session

Location:

Microsoft NetMeeting

Start time: Thu 09/02/2004 13:00

End time: Thu 09/02/2004 15:00

☐ Reminder: 15 minutes

Show time as: Busy

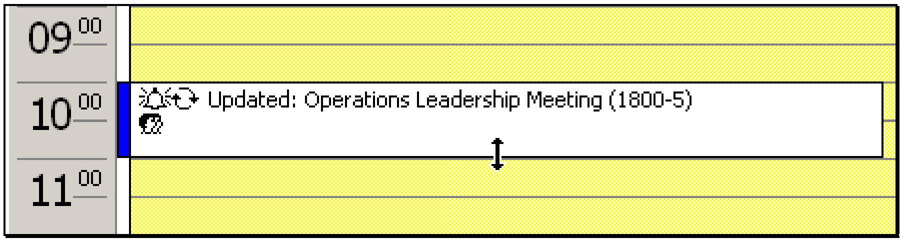
Label: None

2. Make the desired changes in the **Appointment** window.

3.
Save and Close
Click the **Save and Close** button on the **Appointment** toolbar when complete.

Tips:

- If the appointment's starting time is changed, Outlook automatically updates the end time to maintain the original appointment duration.
- Drag-and-drop can be used to change an appointment time. Position the cursor on the left edge of the appointment. When the cursor changes to a cross-hair, drag the appointment to an alternate time within the same day or onto the **Date Navigator** to move the appointment to a different day.
- To extend or shorten the time of an appointment, position the mouse along the top or bottom edge of the appointment's box. The pointer will change to a double arrow. Drag the border to specify the new length.



Updated: Operations Leadership Meeting (1800-5)

- Appointments can be moved and copied by using the **Cut**, **Copy**, and **Paste** commands on the **Edit** menu in the **Calendar** window.
- Appointment details can be edited without opening the **Appointment** window if the appointment is selected and the Preview Pane is visible.

Chapter 2 – Working with Appointments

Deleting an Appointment

Cancelled appointments can easily be removed from the calendar by using the **Delete** command.

Procedure:

1. **Select** the appointment to be deleted.

2. Select the **Edit** menu and choose **Delete**.

   OR

   Press **[Ctrl]** + **[D]**.

   OR

   Press **[Delete]**.

   OR

   ☒ Click the **Delete** button on the **Calendar** toolbar.

3. The appointment is removed from the calendar and placed in the Deleted Items folder.

Tip:

- When deleting an appointment, be sure to select it by clicking the left border, otherwise, Outlook will assume the user is trying to edit the appointment subject, and will only delete text in the appointment box.

Creating a Recurring Appointment

There is often a need to schedule appointments that will recur on a regular basis. Any appointment that occurs regularly can be set up quickly and easily, without having to create multiple single appointments or using copy and paste.

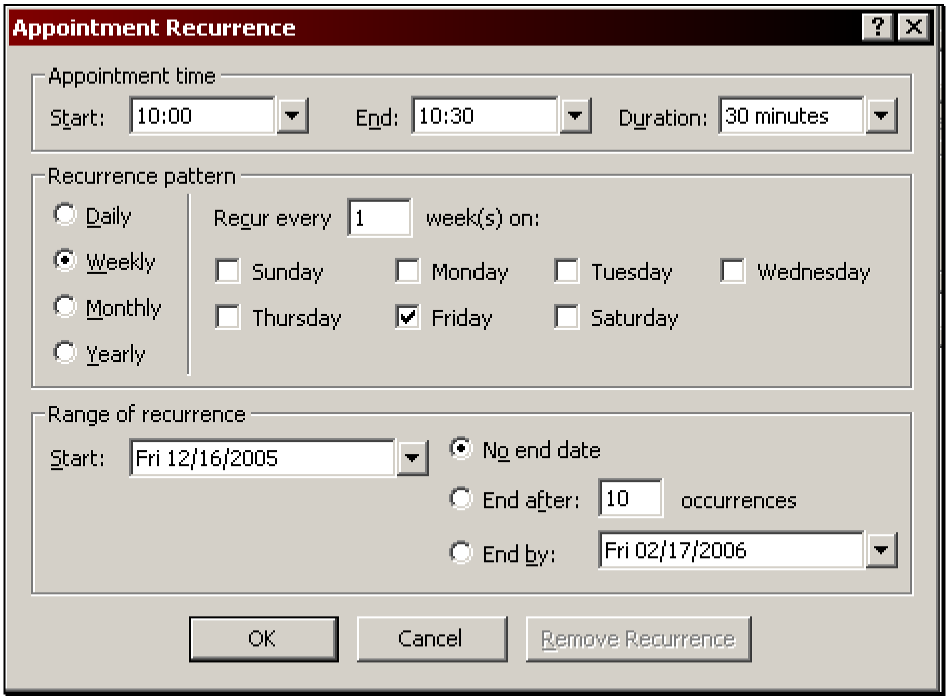
Additionally, appointments that have already been created can be converted into recurring appointments.

Procedure: (To create a recurring appointment)

1. Select the **Actions** menu and choose **New Recurring Appointment**.

OR

Select a time block on the calendar, *right*-click with the mouse and choose **New Recurring Appointment**. The **Appointment Recurrence** dialog box displays:



Appointment Recurrence

Appointment time

Start: 10:00

End: 10:30

Duration: 30 minutes

Recurrence pattern

○ Daily

● Weekly

○ Monthly

○ Yearly

Recur every 1 week(s) on:

☐ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday

☐ Thursday ☑ Friday ☐ Saturday

Range of recurrence

Start: Fri 12/16/2005

● No end date

○ End after: 10 occurrences

○ End by: Fri 02/17/2006

2. Use the following table to complete the options in this dialog box:

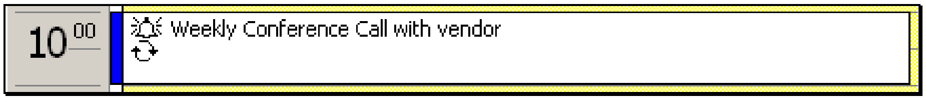
Option	Description
Appointment Time	Verify, type, or use the drop-down lists to enter the **Start** and **End** times, as well as the **Duration** of the recurring appointment.
Recurrence Pattern	Select either **Daily**, **Weekly**, **Monthly**, or **Yearly** to specify the general recurrence interval of the appointment. Use the check boxes and/or drop-down lists on the right side of this section to indicate the specific recurrence interval.
Range of recurrence	In the **Start** box, type or use the drop-down box to enter the date of the first occurrence of the recurring appointment.
No end date	Select this option to repeat the recurring appointment indefinitely.
End after	Select this option when the recurring appointment ends after a specific number of occurrences. Type the number of occurrences of the recurring appointment in the box.
End by	Select this option when the recurring appointment ends on a specific date. Type or use the drop-down box to enter the date of the last occurrence of the appointment.

3. Click **OK** when complete.

4. Fill out the rest of the appointment details as desired.

5.
Save and Close
Click the **Save and Close** button on the **Appointment** toolbar when finished.

6. Outlook displays all of the individual appointments on the calendar on their respective dates with the recurrence symbol in the appointment (two arrows in a circle).


10 00 Weekly Conference Call with vendor

Procedure: (To convert an appointment to a recurring appointment)

1. **Open** the appointment.

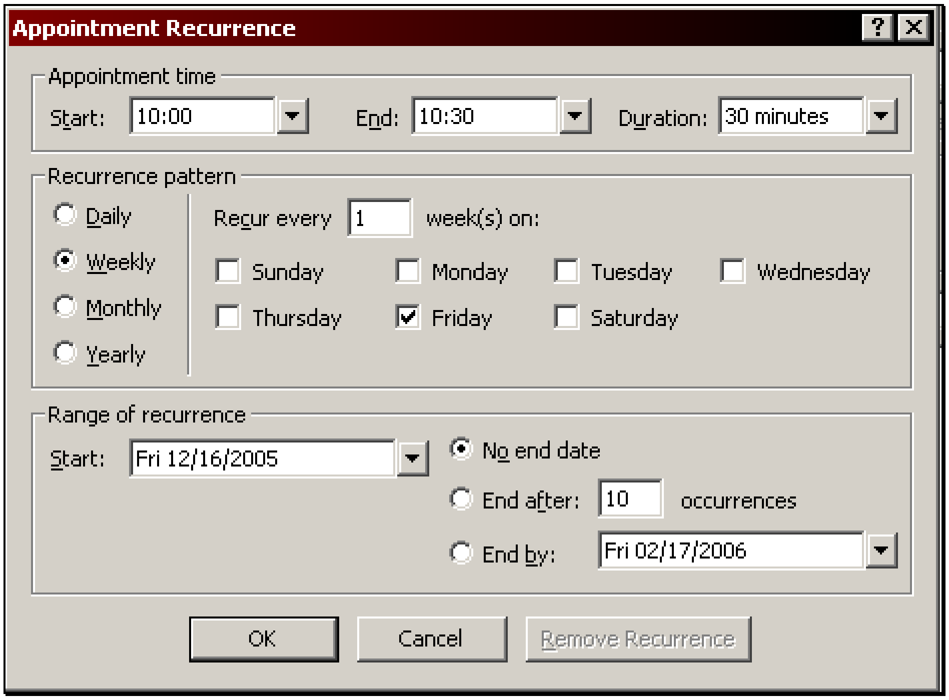
2.
Recurrence…
Click the **Recurrence** button on the **Appointment** toolbar.

   OR

   Select the **Actions** menu and choose **Recurrence**.

   OR

   Press **[Ctrl]** + **[G]**. The **Appointment Recurrence** dialog box displays:



Appointment Recurrence

Appointment time

Start: 10:00 End: 10:30 Duration: 30 minutes

Recurrence pattern

○ Daily
● Weekly
○ Monthly
○ Yearly

Recur every 1 week(s) on:

☐ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday
☐ Thursday ☑ Friday ☐ Saturday

Range of recurrence

Start: Fri 12/16/2005

● No end date
○ End after: 10 occurrences
○ End by: Fri 02/17/2006

3. Select the desired recurrence options (see the previous procedure for details) and click **OK**.

4.
Save and Close
Click the **Save and Close** button on the **Appointment** toolbar.

Editing a Recurring Appointment

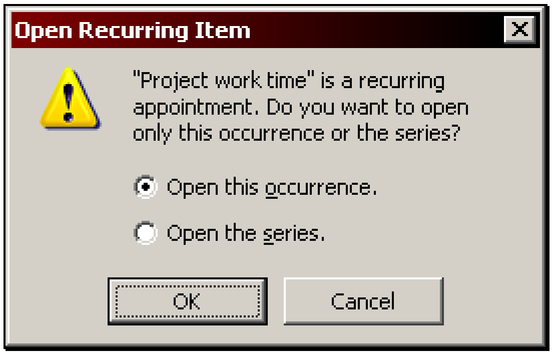
After a recurring appointment has been added to the calendar, it can be edited as needed. For instance, an appointment that normally occurs at a regular time may occasionally need to be moved to a different time. Outlook allows exceptions to recurring appointments and keeps those exceptions as part of the entire series.

When editing a recurring appointment, the user must first decide whether to modify only the current instance of the appointment, or if all of the appointments in the series need to be changed.

Follow the appropriate procedure listed below to make changes as needed to recurring appointments.

Procedure: (To edit one occurrence of a recurring appointment)

1. **Open** the recurring appointment that is to be changed. The **Open Recurring Item** dialog box displays:

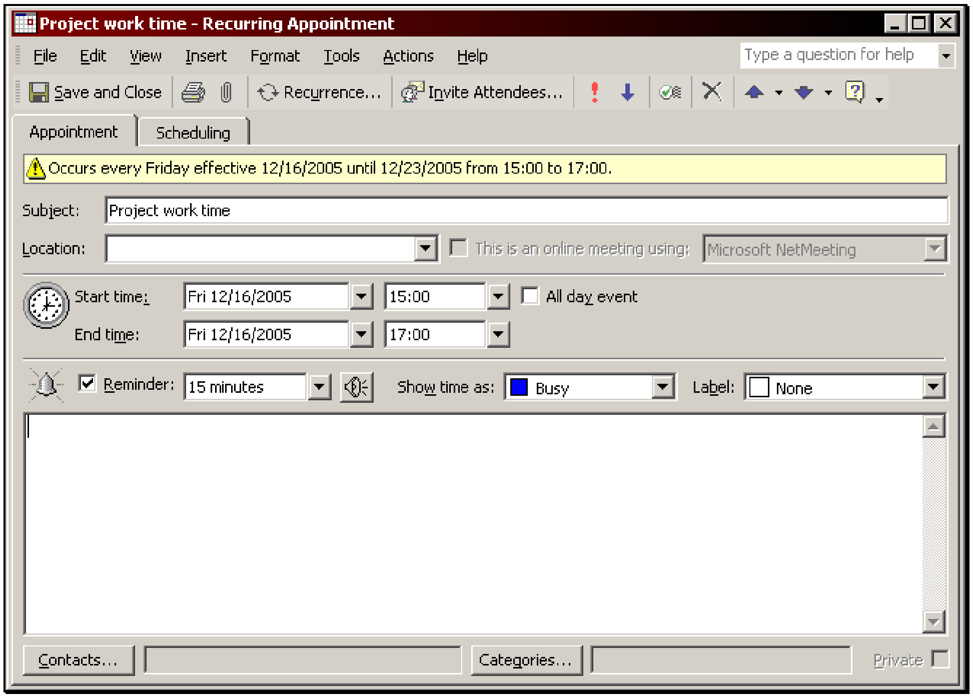


Open Recurring Item

"Project work time" is a recurring appointment. Do you want to open only this occurrence or the series?

● Open this occurrence.
○ Open the series.

2. Choose **Open this occurrence** and click **OK**. The **Recurring Appointment** window displays:


Project work time - Recurring Appointment
File
Edit
View
Insert
Format
Tools
Actions
Help
Type a question for help
Save and Close
Recurrence...
Invite Attendees...
Appointment
Scheduling
Contacts...
Categories...
Private

Occurs every Friday effective 12/16/2005 until 12/23/2005 from 15:00 to 17:00.

Subject: Project work time

Location:

☐ This is an online meeting using: Microsoft NetMeeting

Start time: Fri 12/16/2005 15:00 ☐ All day event

End time: Fri 12/16/2005 17:00

☑ Reminder: 15 minutes

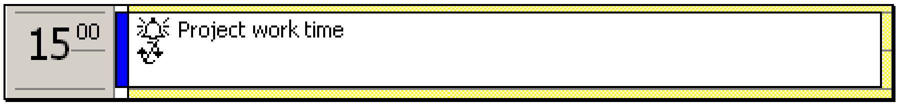
Show time as: Busy

Label: None

3. Make the appropriate changes in this occurrence of the recurring appointment.

4. Click the **Save and Close** button on the **Appointment** toolbar when complete. Only the selected appointment has been changed. All other occurrences of the appointment remain the same.

5. Outlook changes the recurrence symbol (the two arrows in a circle now have a slash through them) in the calendar to indicate that an exception or change to the series has been made.

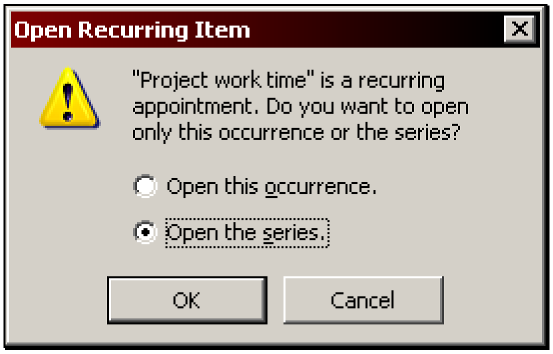

15 00
Project work time

OR

Drag the left border of the appointment to the desired time slot. Outlook will change the icon to show the appointment has been changed.

Procedure: (To change all appointments in a series)

1. **Open** the recurring appointment that is to be changed. The **Open Recurring Item** dialog box displays:



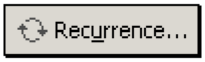
Open Recurring Item

"Project work time" is a recurring appointment. Do you want to open only this occurrence or the series?

○ Open this occurrence.

● Open the series.

2. Choose **Open the series** and click **OK**. The **Recurring Appointment** window displays.

3. 

Click the **Recurrence** button on the **Appointment** toolbar.

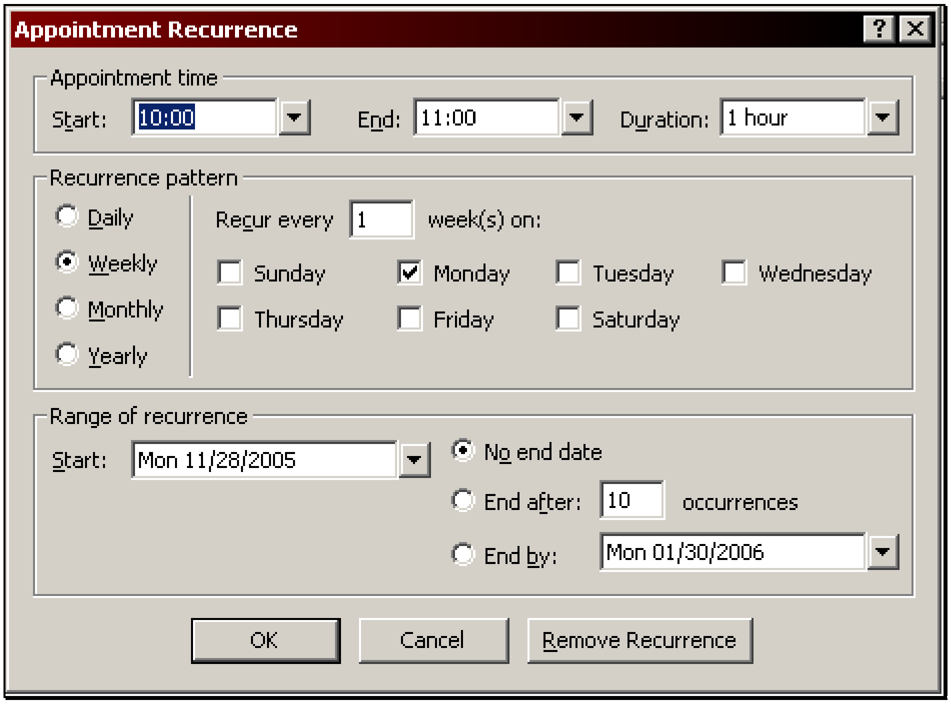
OR

Select the **Actions** menu and choose **Recurrence**.

OR

Press **[Ctrl] + [G]**. The **Appointment Recurrence** dialog box displays:

© 0A316



Appointment time

Start: 10:00 End: 11:00 Duration: 1 hour

Recurrence pattern

○ Daily
● Weekly
○ Monthly
○ Yearly

Recur every 1 week(s) on:

☐ Sunday ☑ Monday ☐ Tuesday ☐ Wednesday
☐ Thursday ☐ Friday ☐ Saturday

Range of recurrence

Start: Mon 11/28/2005

● No end date
○ End after: 10 occurrences
○ End by: Mon 01/30/2006

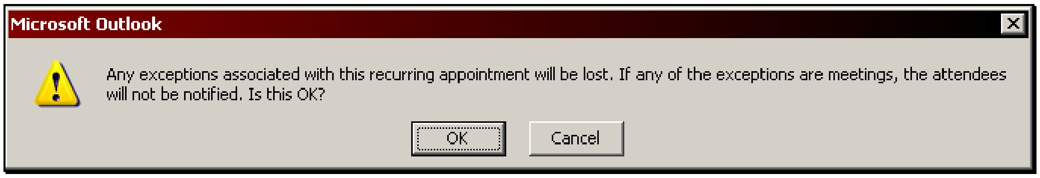
4. Change the date, time, or recurrence pattern as desired.

5. Click **OK** to accept the changes. The InfoBar of the appointment will indicate if there are any conflicts with appointments already on the calendar.

6.
Save and Close
Click the **Save and Close** button on the **Appointment** toolbar when complete. The changes will appear in the remaining recurring appointments.

Warning:

- When editing the series, previous changes to individual appointments will be lost.



Any exceptions associated with this recurring appointment will be lost. If any of the exceptions are meetings, the attendees will not be notified. Is this OK?

Deleting a Recurring Appointment

Similar to editing a recurring appointment, either a single occurrence of a recurring appointment can be deleted, or the entire recurring series can be removed from the calendar.

Procedure:

1. **Select** the appointment to be deleted.
2. Select the **Edit** menu and choose **Delete**.

OR

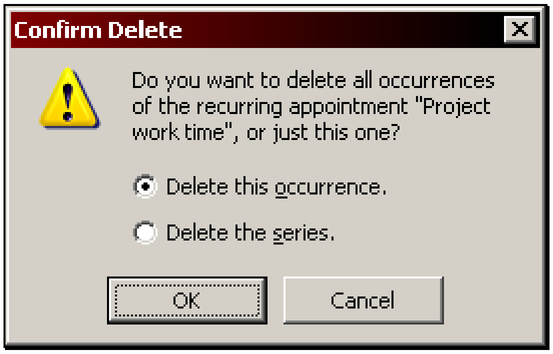
Right-click the appointment and choose **Delete**.

OR

Press the **[Delete]** key.

OR

☒ Click the **Delete** button on the **Calendar** toolbar. The **Confirm Delete** dialog box displays:



Confirm Delete

Do you want to delete all occurrences of the recurring appointment "Project work time", or just this one?

● Delete this occurrence.

○ Delete the series.

3. Choose either **Delete the series** to remove the entire recurring series or **Delete this occurrence** to remove a single occurrence.
4. Click **OK** to accept.
5. The appointment(s) will be removed from the calendar.

Chapter 3

Working with Events

Chapter Objectives:

- Creating an Event
- Editing an Event
- Deleting an Event
- Working with Recurring Events
- Changing an Event to an Appointment

Overview

An event is generally an activity that lasts 24 hours or more. Events do not appear as blocks of time on the calendar, but instead, appear as a banner across the top of the day(s) of the event. Some examples of events include trade shows, conferences, birthdays, or anniversaries.

By default, events do not "block off" time in the calendar like appointments. Days that have events will not have dates in bold format in the Date Navigator. This can be changed when creating the event.

Events have many similar characteristics to appointments, and both types of items can easily be converted into the other.

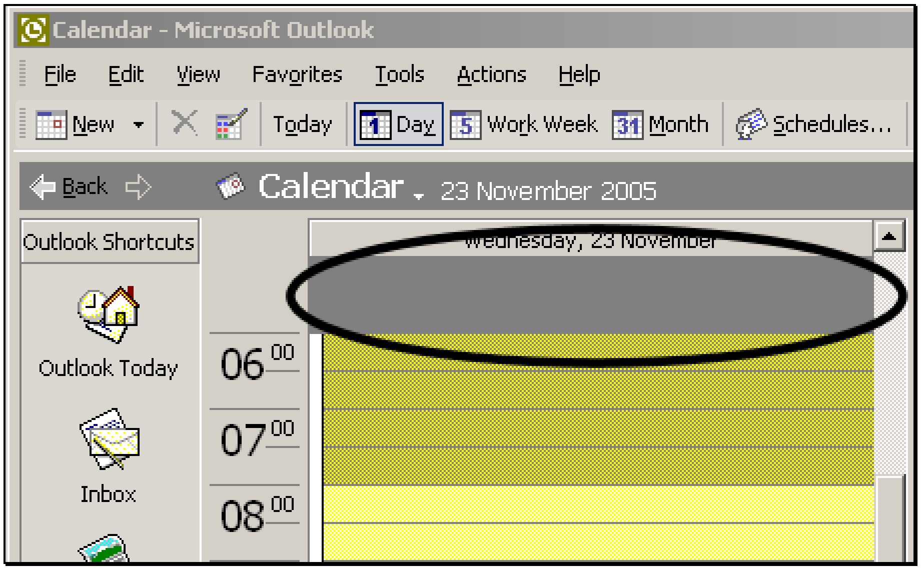
Creating an Event

An event is actually an appointment that has the **All day event** check box enabled. While the initial process for creating an event is slightly different, all other details for creating an event and filling out its details are exactly the same as creating an appointment.

Procedure:

1. Select the date on which the event occurs.

2. *Double*-click in the calendar banner area below the date heading.

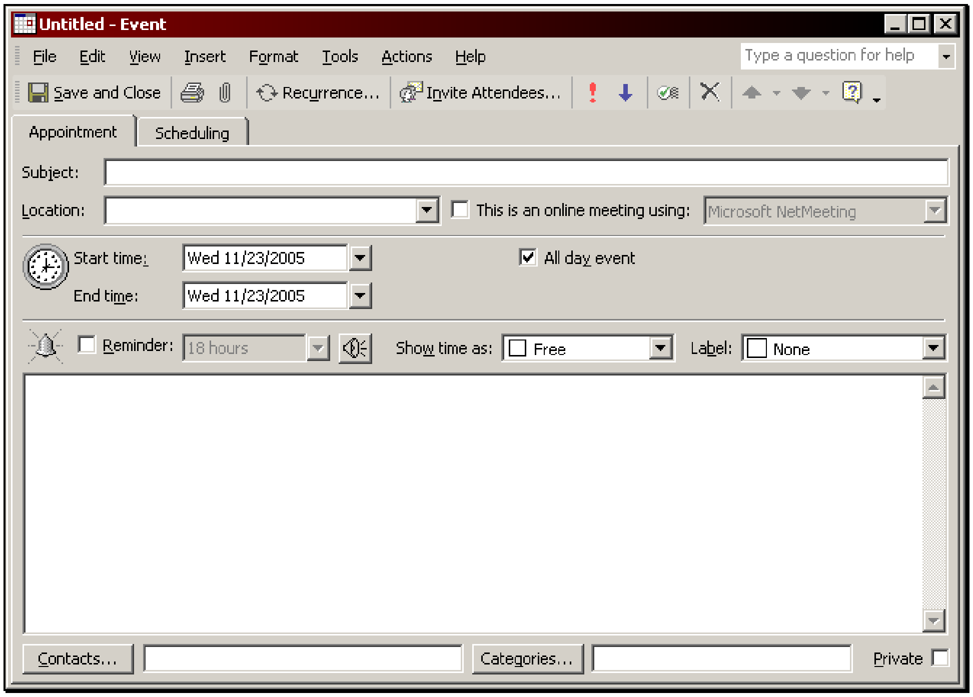

Calendar - Microsoft Outlook
File
Edit
View
Favorites
Tools
Actions
Help
New
Today
Day
Work Week
Month
Schedules...
Back
Calendar
23 November 2005
Outlook Shortcuts
Wednesday, 23 November
Outlook Today
Inbox
06 00
07 00
08 00

OR

Right-click the calendar and select **New All Day Event**.

OR

Select the **Actions** menu and choose **New All Day Event**. The **Event** window displays:


Untitled - Event
File
Edit
View
Insert
Format
Tools
Actions
Help
Type a question for help
Save and Close
Recurrence...
Invite Attendees...
Appointment
Scheduling
Contacts...
Categories...

Subject:

Location:

☐ This is an online meeting using: Microsoft NetMeeting

Start time: Wed 11/23/2005

End time: Wed 11/23/2005

☑ All day event

☐ Reminder: 18 hours

Show time as: Free

Label: None

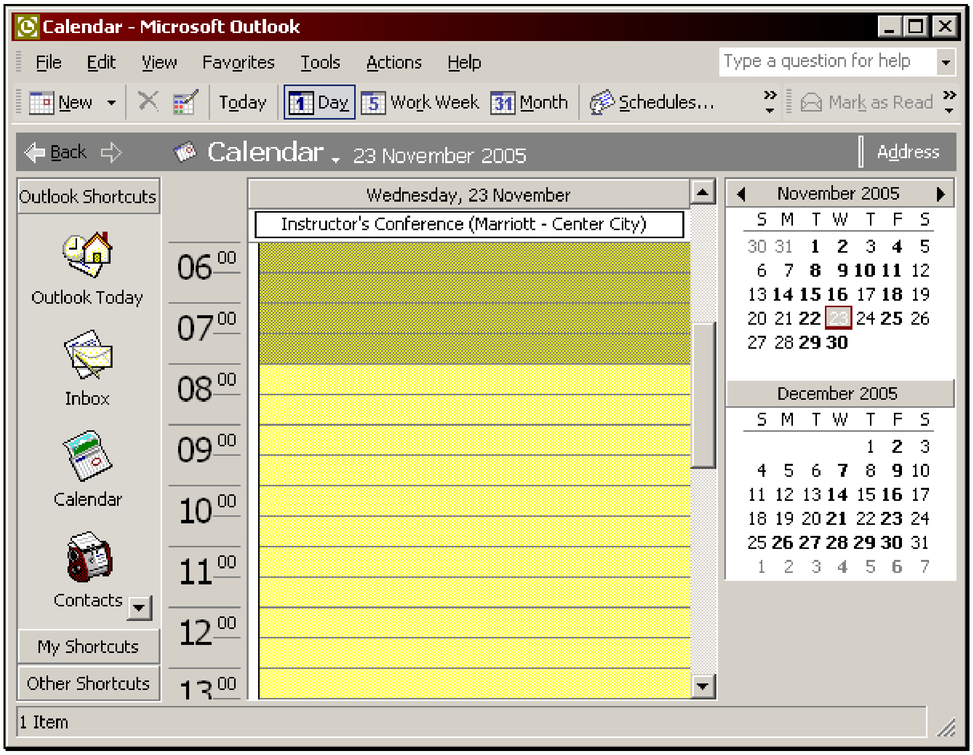
Private ☐

3. Fill out the event fields. Use the table in **Chapter 2 – Working with Appointments** for a complete description of each field.

4. In the **Show time as** drop-down list, choose **Free**, **Tentative**, **Busy**, or **Out of Office**. This option controls the display of the time on a user's calendar to other users. **Free** is the default for events and will allow the user to schedule other appointments and meetings without creating a conflict. Set **Show time as** to **Busy** or **Out of Office** to "block off" the time in the calendar and have the date show up in bold font in the Date Navigator.

5.
Save and Close
Click the **Save and Close** button on the **Event** toolbar when complete.

6. The event now appears in the banner below the date.


Calendar - Microsoft Outlook
File
Edit
View
Favorites
Tools
Actions
Help
Type a question for help
New
Today
Day
Work Week
Month
Schedules...
Mark as Read
Back
Calendar
23 November 2005
Address
Outlook Shortcuts
Outlook Today
Inbox
Calendar
Contacts
My Shortcuts
Other Shortcuts
Wednesday, 23 November
06 00
07 00
08 00
09 00
10 00
11 00
12 00
13 00
November 2005
December 2005
1 Item

Instructor's Conference (Marriott - Center City)

Tips:

- By default, events last from midnight to midnight.
- Any day may have multiple events, however, once an event is added, the banner area collapses to the size of the first event and it is difficult to double-click in the area to create a new event. Use one of the other methods (*right*-click or the **Actions** menu) to create additional events.

Chapter 3 – Working with Events

Editing an Event

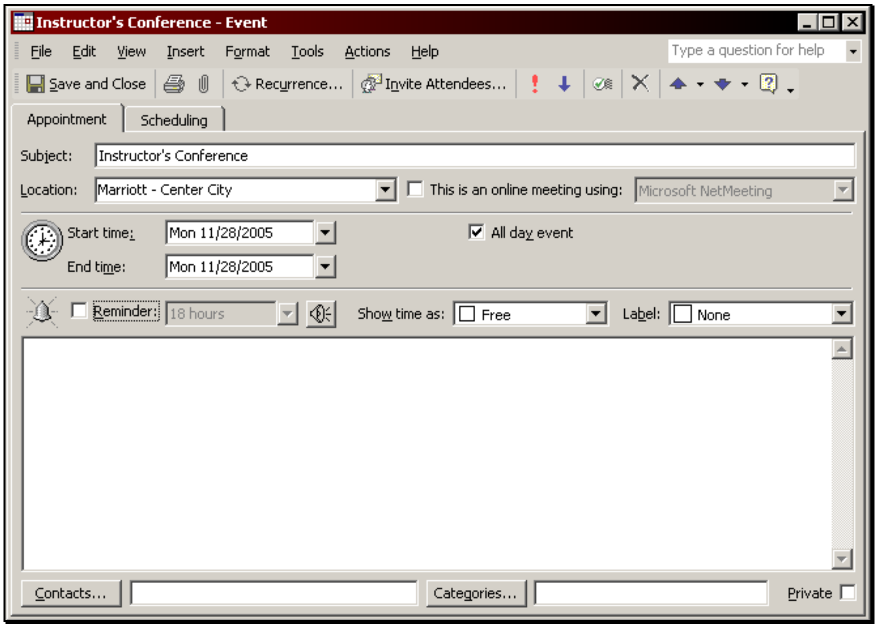
Once an event has been created and saved to the calendar, it can be opened to make changes or modifications to the event details.

Procedure:

1. *Right*-click the event to be edited and choose **Open**.

OR

Double-click the event to be edited. The **Event** window displays:


Instructor's Conference - Event
File
Edit
View
Insert
Format
Tools
Actions
Help
Type a question for help
Save and Close
Recurrence...
Invite Attendees...
Appointment
Scheduling
Contacts...
Categories...

Subject: Instructor's Conference
Location: Marriott - Center City
☐ This is an online meeting using: Microsoft NetMeeting
Start time: Mon 11/28/2005
End time: Mon 11/28/2005
☑ All day event
☐ Reminder: 18 hours
Show time as: Free
Label: None
Private ☐

2. Make the desired changes.

3.
Save and Close
Click the **Save and Close** button on the **Event** toolbar when complete.

Tip:

- To edit only the subject of the event, click the event name and make changes. Click anywhere on the calendar to exit the edit mode.

Deleting an Event

If an event is no longer needed on the calendar or has been cancelled, it can be removed.

Procedure:

1. Select the event with the mouse.
2. Select the **Edit** menu and choose **Delete**.

   OR

   Press **[Ctrl]** + **[D]**.

   OR

   ☒ Click the **Delete** button on the **Calendar** toolbar.
3. Outlook removes the event from the calendar.

Tip:

- An event can also be deleted by *right*-clicking the event and selecting **Delete** from the pop-up menu.

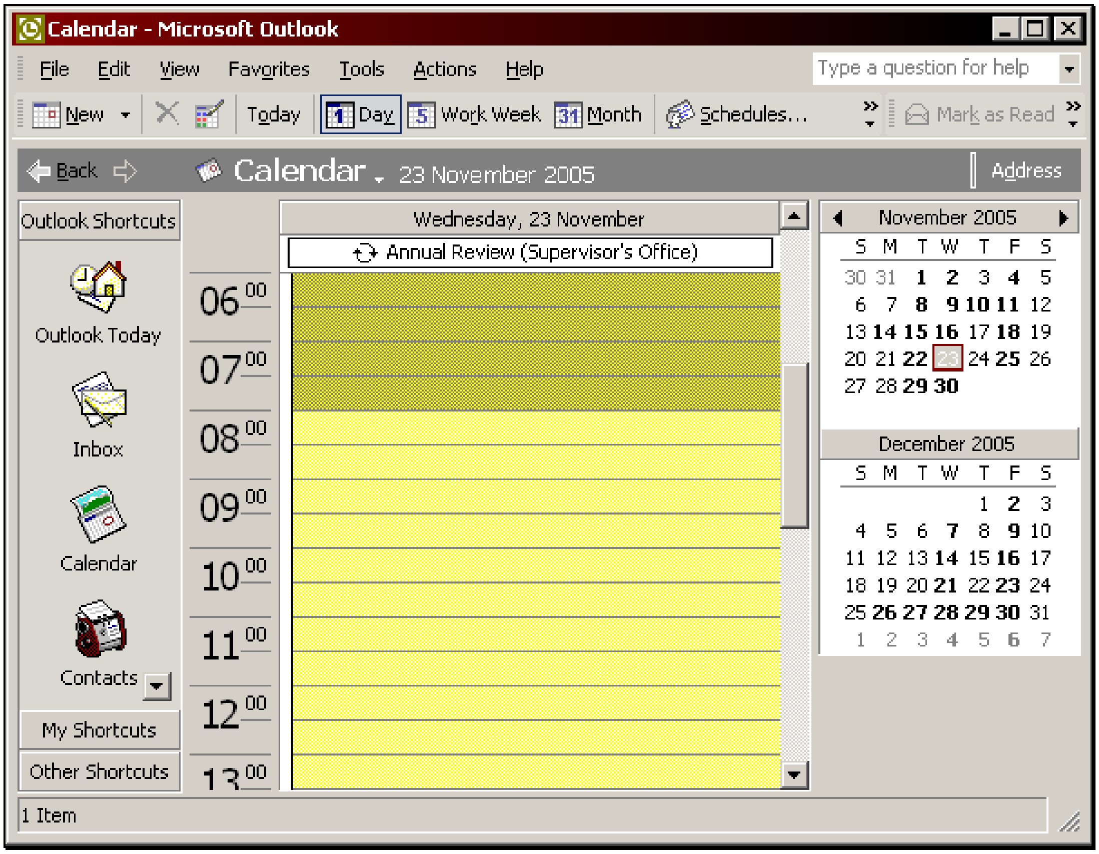
Warning:

- An event cannot be deleted by using the **[Delete]** key.

Working with Recurring Events

Like appointments, events can be made to recur on a regular basis, such as monthly or yearly (i.e. birthdays and holidays). Events are created, edited and modified, and deleted in the same manner as appointments.

Recurring events will have the recurring symbol next to the subject of the event in the calendar.


Calendar - Microsoft Outlook
File Edit View Favorites Tools Actions Help
Type a question for help
New Today Day Work Week Month Schedules... Mark as Read
Back Calendar 23 November 2005 Address
Outlook Shortcuts
Outlook Today
Inbox
Calendar
Contacts
My Shortcuts
Other Shortcuts
Wednesday, 23 November
Annual Review (Supervisor's Office)
06 00
07 00
08 00
09 00
10 00
11 00
12 00
13 00
November 2005
December 2005
1 Item

Please refer to the topics **Creating a Recurring Appointment**, **Editing a Recurring Appointment**, and **Deleting a Recurring Appointment** in **Chapter 2 – Working with Appointments** of this manual for the specific procedures.

When creating a recurring event, choose **New Recurring Event** from the menu instead of New Recurring Appointment.

Changing an Event to an Appointment

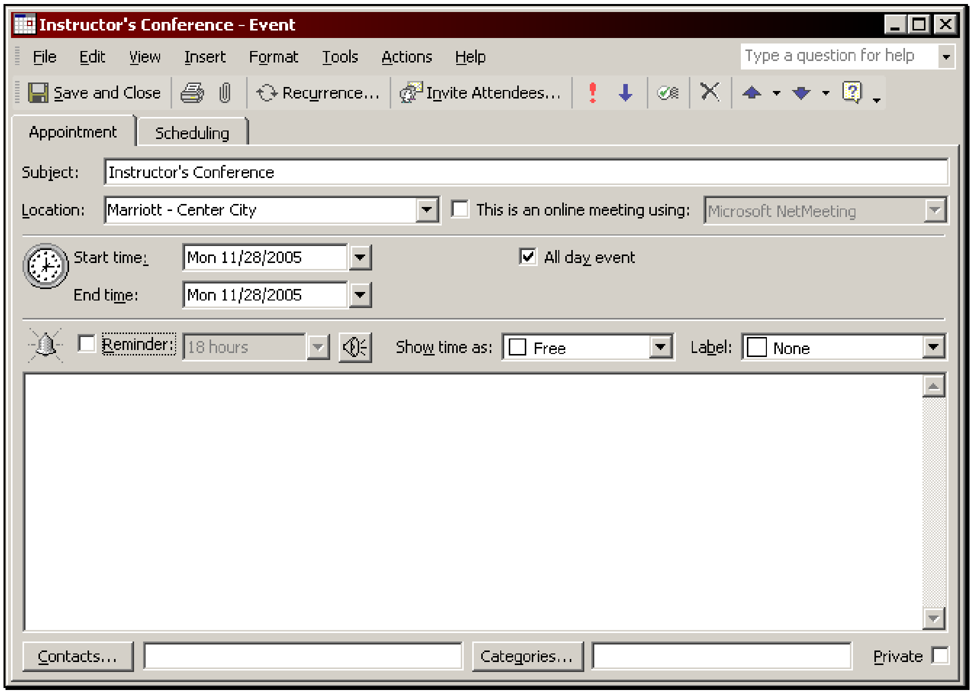
By definition, events are essentially appointments that last 24 hours or more, display no specific start and end time (midnight to midnight is assumed), and by default, show time on the calendar as free. However, there may be times that converting an event into an appointment is desired so that specific start and end times can be entered.

Procedure:

1. *Right*-click the event to be edited and choose **Open**.

OR

Double-click the event to be edited. The **Event** window displays:


File
Edit
View
Insert
Format
Tools
Actions
Help
Type a question for help
Save and Close
Recurrence…
Invite Attendees…
Appointment
Scheduling
Contacts…
Categories…

Instructor's Conference - Event

Subject: Instructor's Conference

Location: Marriott - Center City ☐ This is an online meeting using: Microsoft NetMeeting

Start time: Mon 11/28/2005 ☑ All day event

End time: Mon 11/28/2005

☐ Reminder: 18 hours Show time as: Free Label: None

Private ☐

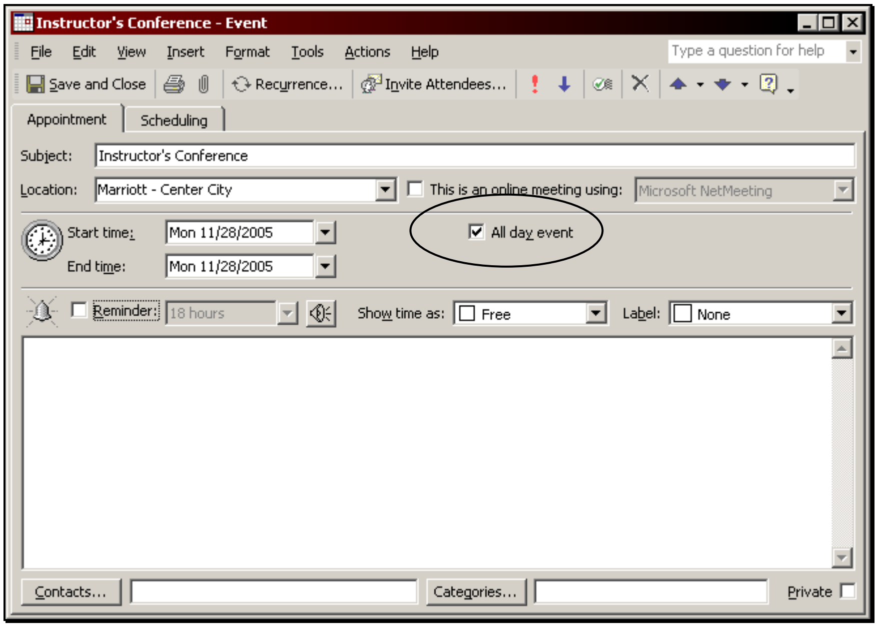
2. Clear the **All day event** check box. The following changes will occur:

- The **Start time** and **End time** time drop-down boxes will reappear.
- The title of the window will change from **Event** to **Appointment**.
- If a **Reminder** was selected, it will change to the default for appointments (usually 15 minutes).
- The **Show time as** field will change to **Busy**.

3. Fill in a start time and end time for the appointment.
4. Make any other additions or corrections as needed.
5. Save and Close Click the **Save and Close** button on the **Appointment** toolbar.

Tip:

- This process can easily be reversed, that is, an appointment can be converted to an event by selecting the **All day event** check box.


Instructor's Conference - Event
File Edit View Insert Format Tools Actions Help
Type a question for help
Save and Close
Recurrence...
Invite Attendees...
Appointment
Scheduling
Contacts...
Categories...

Subject: Instructor's Conference

Location: Marriott - Center City

☐ This is an online meeting using: Microsoft NetMeeting

Start time: Mon 11/28/2005

End time: Mon 11/28/2005

☑ All day event

☐ Reminder: 18 hours

Show time as: Free

Label: None

Private ☐

Chapter 4

Working with Meetings

Chapter Objectives:

- Understanding the Meeting Planner
- Scheduling a Meeting
- Editing a Meeting Request
- Adding or Removing Meeting Attendees
- Processing Meeting Request Responses
- Checking Meeting Attendee Status
- Managing New Meeting Time Proposals
- Cancelling a Meeting
- Sending a Message to Meeting Attendees
- Responding to a Meeting Request
- Proposing a New Meeting Time
- Cancelling Attendance at a Meeting
- Receiving a Meeting Cancellation
- Working with Recurring Meetings

Overview

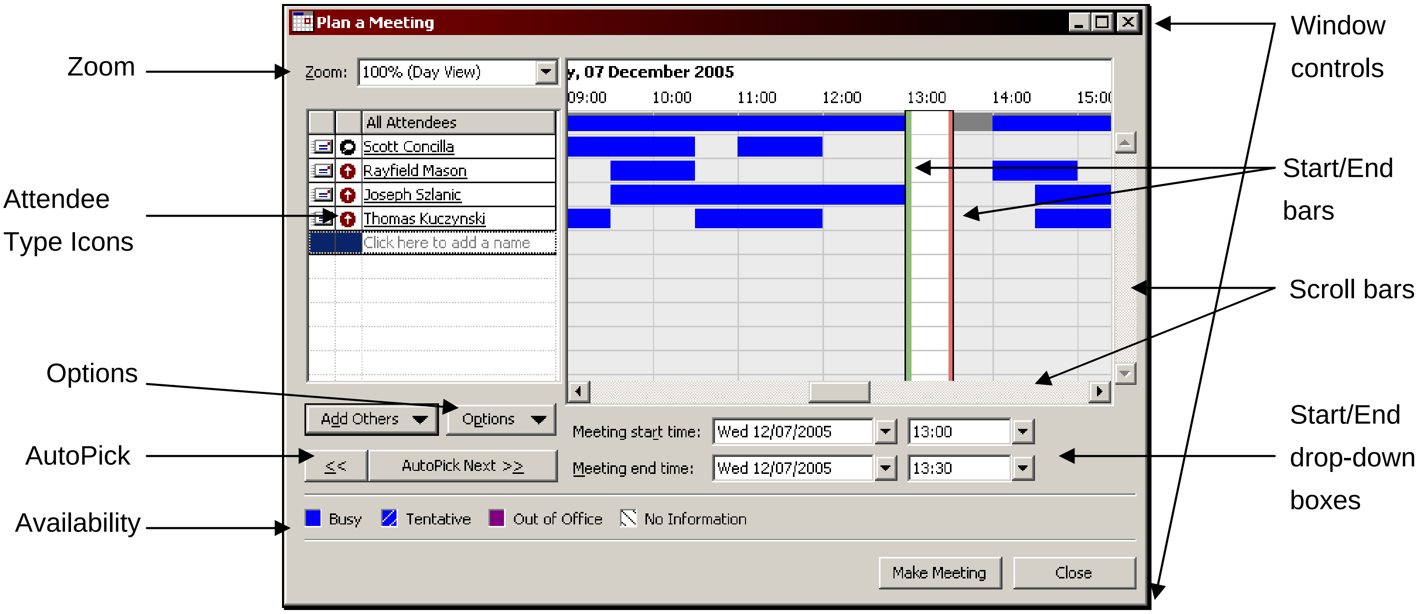
Meetings and appointments are similar, however, an appointment involves only the person using the calendar and their time, whereas a meeting involves inviting others and coordinating their schedules. Another difference is that a meeting may require the scheduling of resources, such as a conference room or an overhead projector.

This chapter covers scheduling one-time and recurring meetings, responding to meeting requests, making changes to meetings, cancelling meetings, and tracking responses to meetings.

This chapter's topics are organized around the two basic roles that come into play with meetings – the **Meeting Organizer** and the **Meeting Attendees**.

Understanding the Meeting Planner

Outlook XP includes many improvements to the **Meeting Planner**. This window is displayed when the **Plan a Meeting** feature is used, or the **Scheduling** tab of a meeting invitation is selected. It is also nearly identical to the **Group Schedule** window (see **Chapter 6 – Managing Group Schedules**).


Zoom
Attendee Type Icons
Options
AutoPick
Availability
Window controls
Start/End bars
Scroll bars
Start/End drop-down boxes
Plan a Meeting
09:00
10:00
11:00
12:00
13:00
14:00
15:0
Add Others
Options
<<
AutoPick Next >>
Busy
Tentative
Out of Office
No Information
Make Meeting
Close

Zoom: 100% (Day View)

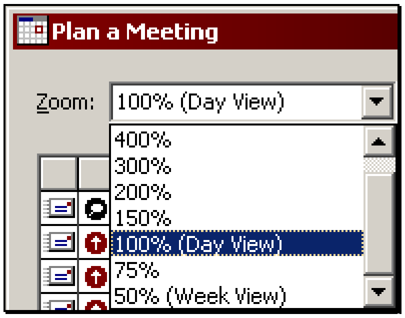
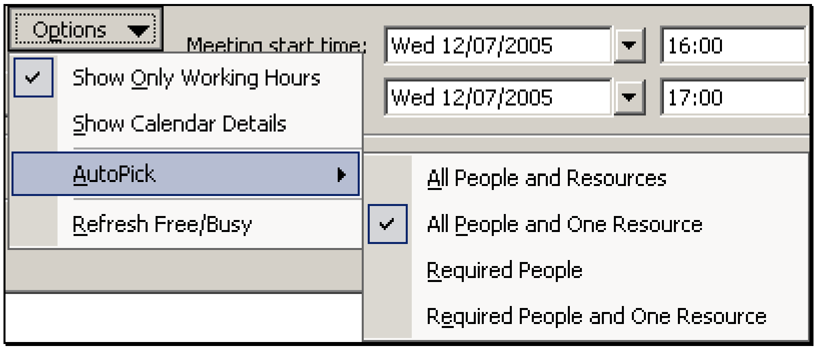
y, 07 December 2005

All Attendees
Scott Concilla
Rayfield Mason
Joseph Szlanic
Thomas Kuczynski
Click here to add a name

Meeting start time: Wed 12/07/2005 13:00

Meeting end time: Wed 12/07/2005 13:30

The following table describes the labeled sections of this window and their use:

Feature	Description
Zoom	 Plan a Meeting Zoom: 100% (Day View) 400% 300% 200% 150% 100% (Day View) 75% 50% (Week View) Use this drop-down list to control how much information is displayed in the planner window. This can be adjusted from **50% (Week View)** to **500%**.
Attendee Type Icons	**Meeting Organizer** (black) **Required Attendee** (maroon) **Optional Attendee** (blue) **Resource** (green) These icons indicate the role of each attendee. To change an attendee's status, click the attendee icon to display a drop-down list and select a new status.
Options	 Options Meeting start time: Wed 12/07/2005 16:00 Wed 12/07/2005 17:00 Show Only Working Hours Show Calendar Details AutoPick Refresh Free/Busy All People and Resources All People and One Resource Required People Required People and One Resource This drop-down menu controls what is displayed in the planning grid and the behavior of the AutoPick feature. Calendar details will only be displayed if the meeting attendee has granted delegate or read permission to the meeting organizer.

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Feature	Description
AutoPick	Use these buttons to have Outlook automatically select a meeting time when attendees (as set by the AutoPick Options) are available. The main or larger button moves forward in time, while the smaller button moves backwards. Each click will jump to another available time slot. The backward button cannot select a time before the current time.
Availability	**Busy**. The member is not available. These appointments are shown in solid blue. **Tentative**. The block of time is tentatively scheduled. Tentative appointments are colored blue with diagonal white stripes. **Out Of Office**. The member is on vacation, at a conference, or otherwise indisposed. These times are shown in purple. **No Information**. There is no information about the member's schedule. Such blocks of time are shown as white areas with diagonal black lines. This might indicate that the member does not use Outlook, the account is new or does not exist, or that there are other problems with the account.
Window controls	The Meeting Planner window can be sized like most application windows. This allows the planner to be maximized and minimized.
Start/End bars	These bars – the left one is green, the right one is red – indicate the start and end time of the meeting. They can be dragged to change the meeting date, time, and length.
Scroll bars	The horizontal scroll bar is used to scroll forward and backward through time. The vertical scroll bar – if available – will scroll through the list of attendees.
Start/End drop-down boxes	Use these drop-down boxes to select a meeting date and time. These will update automatically if the Start/End bars are moved.

Chapter 4 – Working with Meetings

Working as a Meeting Organizer

The next set of topics in this chapter pertain to the role of **Meeting Organizer**. The meeting organizer is the person who is in control of the meeting, and makes the initial meeting request.

The topics covered in this section are:

- Scheduling a Meeting
- Editing a Meeting Request
- Adding or Removing Meeting Attendees
- Processing Meeting Request Responses
- Checking Meeting Attendee Status
- Managing New Meeting Time Proposals
- Cancelling a Meeting
- Sending a Message to Meeting Attendees

Scheduling a Meeting

A meeting is defined as an activity that involves other people or resources, such as a conference room or television. When scheduling a meeting, the meeting organizer compares free time on other users’ schedules to find potential meeting times. Meeting attendee “free” and “busy” times are displayed in the **Meeting Planner**. The name of each attendee appears next to their information making it simple to view their schedules.

There are two ways to schedule a meeting. The first method involves having a specific date and time for the meeting already in mind, the other involves knowing who should be invited, and attempting to find a date and time when everyone can be present.

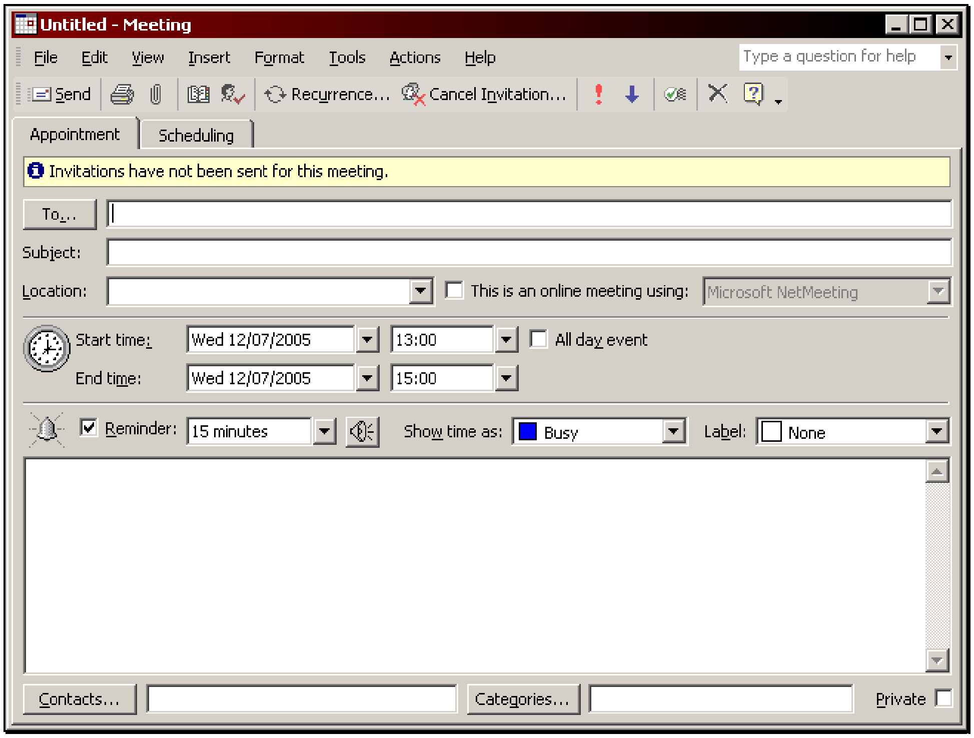
Procedure: (To schedule a meeting knowing the desired date and time)

1. In the calendar notepad, select a date and time for the meeting.

2. Select the **Actions** menu and choose **New Meeting Request**.

OR

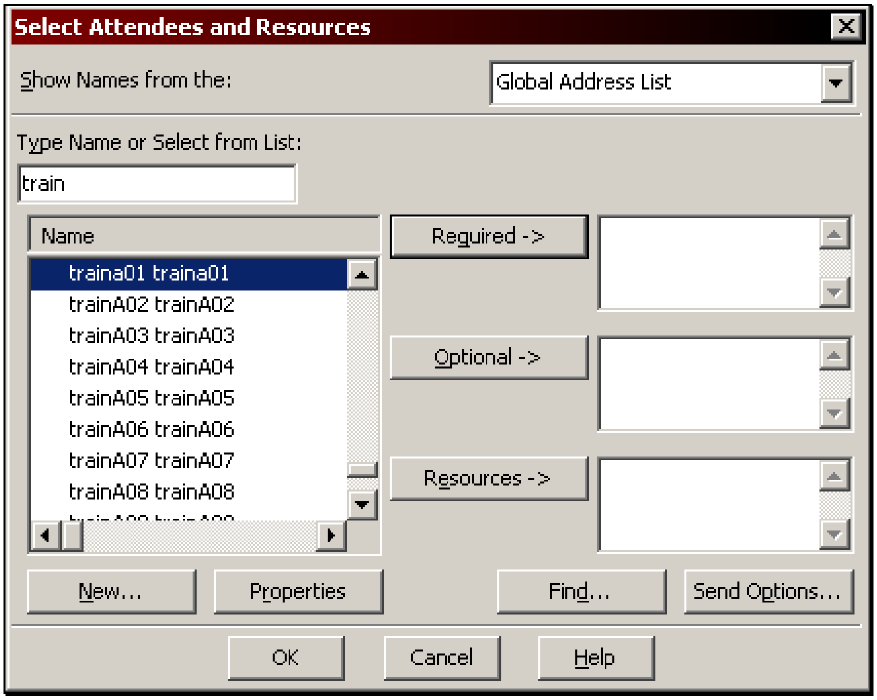
Right-click the selected time block and choose **New Meeting Request**. The **Meeting** window displays:


Untitled - Meeting
File
Edit
View
Insert
Format
Tools
Actions
Help
Type a question for help
Send
Recurrence...
Cancel Invitation...
Appointment
Scheduling
To...
Subject:
Location:
This is an online meeting using:
Microsoft NetMeeting
Start time:
End time:
All day event
Reminder:
Show time as:
Label:
Contacts...
Categories...
Private

Invitations have not been sent for this meeting.

Start time: Wed 12/07/2005 13:00
End time: Wed 12/07/2005 15:00
☐ All day event
☑ Reminder: 15 minutes
Show time as: Busy
Label: None
☐ This is an online meeting using: Microsoft NetMeeting
☐ Private

3. Click **To**. The **Select Attendees and Resources** dialog box displays:



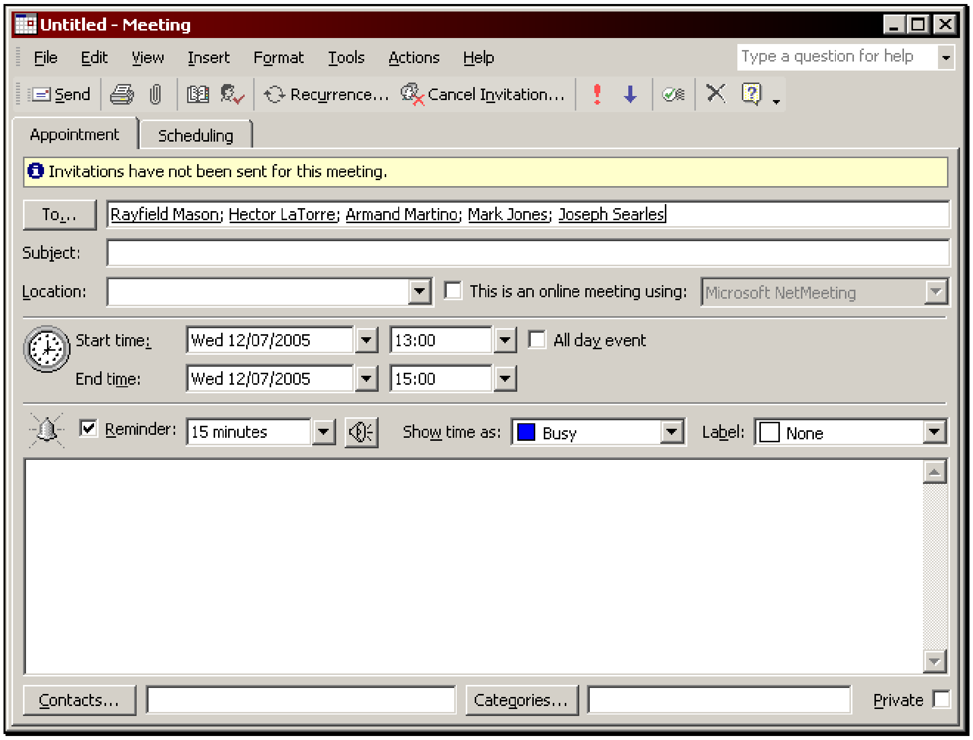
Select Attendees and Resources
Show Names from the:
Global Address List
Type Name or Select from List:
train
Name
traina01 traina01
trainA02 trainA02
trainA03 trainA03
trainA04 trainA04
trainA05 trainA05
trainA06 trainA06
trainA07 trainA07
trainA08 trainA08
Required ->
Optional ->
Resources ->
New...
Properties
Find...
Send Options...
OK
Cancel
Help

4. In the **Type Name or Select from List** area, choose the names of the other meeting attendees, and then select one of the following attendance category buttons:

Button	Description
Required	The person must attend.
Optional	The person is invited but does not have to attend.
Resources	This may be any additional materials or persons needed for the meeting, such as a conference room or projector.

5. Click **OK** when all attendees have been selected.

6. The selected names appear in the **To** field.


Untitled - Meeting
File Edit View Insert Format Tools Actions Help
Type a question for help
Send
Recurrence...
Cancel Invitation...
Appointment
Scheduling
To...
Contacts...
Categories...

Invitations have not been sent for this meeting.

To... Rayfield Mason; Hector LaTorre; Armand Martino; Mark Jones; Joseph Searles

Subject:

Location:

☐ This is an online meeting using: Microsoft NetMeeting

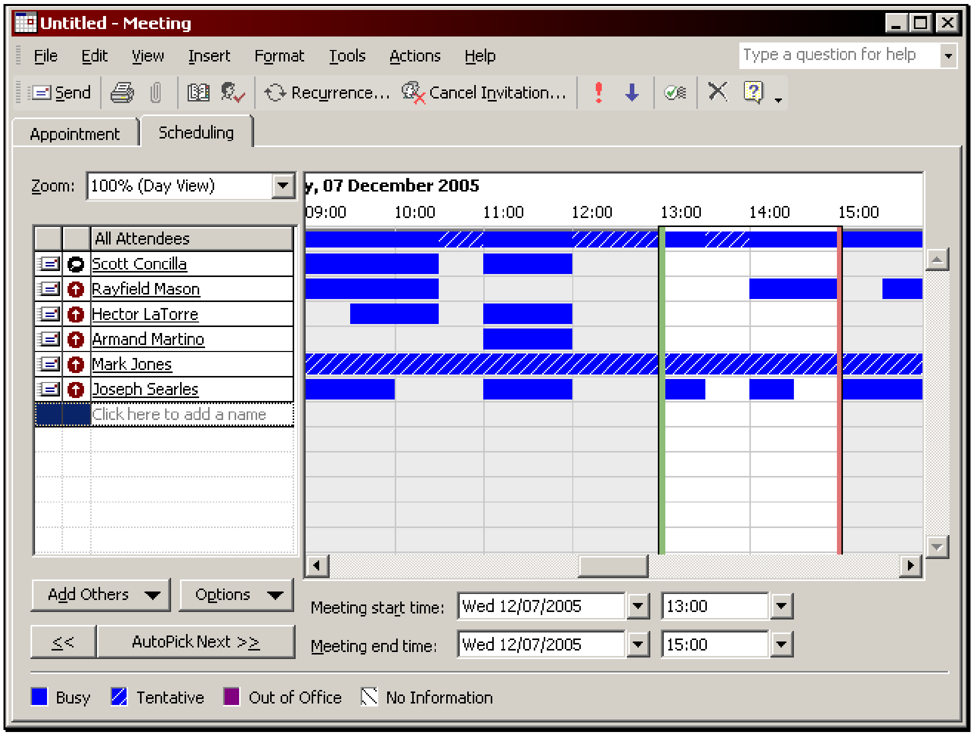
Start time: Wed 12/07/2005 13:00 ☐ All day event

End time: Wed 12/07/2005 15:00

☑ Reminder: 15 minutes Show time as: Busy Label: None

Private ☐

7. If desired, select the **Scheduling** tab to view the invitees' calendars.


Untitled - Meeting
File Edit View Insert Format Tools Actions Help
Type a question for help
Send
Recurrence...
Cancel Invitation...
Appointment
Scheduling
y, 07 December 2005
09:00
10:00
11:00
12:00
13:00
14:00
15:00
Add Others
Options
<<
AutoPick Next >>

Zoom: 100% (Day View)

All Attendees
Scott Concilla
Rayfield Mason
Hector LaTorre
Armand Martino
Mark Jones
Joseph Searles
Click here to add a name

Meeting start time: Wed 12/07/2005 13:00

Meeting end time: Wed 12/07/2005 15:00

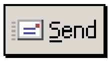
Busy Tentative Out of Office No Information

8. If any invitee is unavailable during the selected time, choose a new time by either dragging the Start and End bars, using the **Meeting Start Time** and **End Time** drop-down boxes, or use the **AutoPick** feature to have Outlook choose a time automatically.

9. Select the **Appointment** tab to return to the meeting invitation. Use the following table to complete the fields in the meeting invitation:

Option	Description
Subject	Type a descriptive name or title for the meeting. The title bar of the meeting invitation will change to match the subject.
Location	Enter the location of the meeting, or select a previously used location from the drop-down list. **Note:** This does NOT schedule or reserve a conference room or resource. In order to reserve a conference room using the calendar, there must be an entry for the conference room in the Global Address List, and it must be invited to the meeting in the same manner as a person.
This is an online meeting	Check this option to create an online meeting using an online/internet meeting service. (Do not use at PGW).
Start time	Type or use the drop-down boxes to enter the beginning date and time for the meeting.
All day event	Select this check box to make the meeting an event. (See **Chapter 3 – Working with Events** for more information.)
End time	Type or use the drop-down boxes to enter the ending date and time for the meeting.
Reminder	Select this check box to set a reminder and use the corresponding drop-down list to select or type the amount of time prior to the meeting for the reminder to appear.
Play a sound	Select this button to choose the sound file to be played when the reminder appears.
Show time as	Choose **Free**, **Tentative**, **Busy**, or **Out of Office** from the drop-down list. This changes the appearance of available time when others view your schedule. The default for meetings is **Busy**.

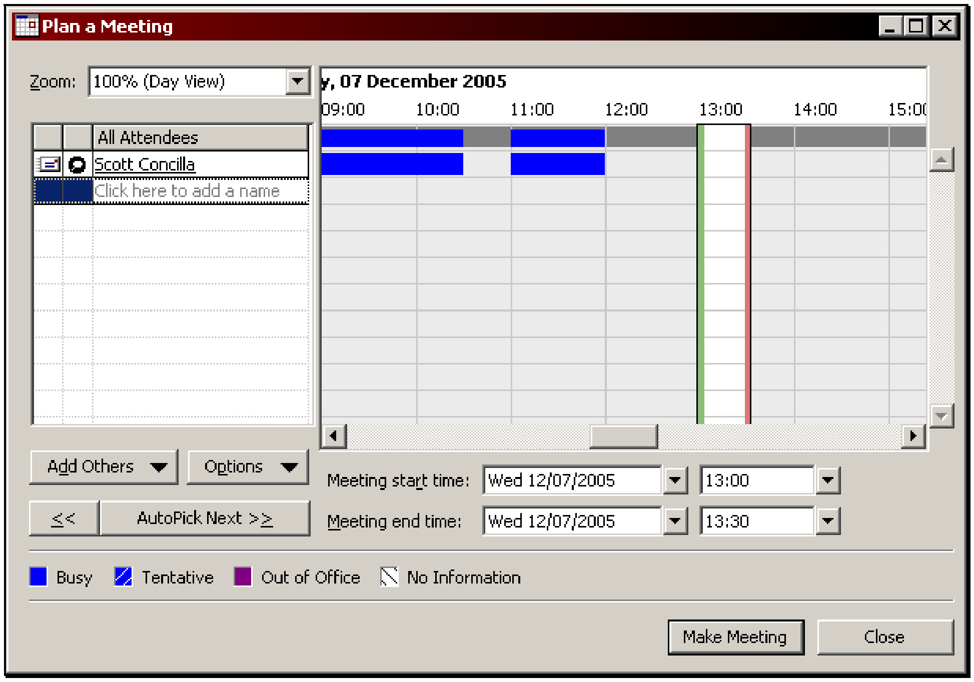
Option	Description
Label	Select a label (calendar coloring) for the meeting. This applies to the meeting organizer only. Meeting attendees will be able to assign their own labels.
Notes	Type any additional details about the appointment in this area. This area is also used to insert or attach a file, such as a meeting agenda. Use the **Insert**, **File** menu command, or the **Insert File** button on the **Meeting** toolbar.
Contacts	Select this option to associate this meeting with members of the Outlook Contacts folder. **Note:** This does not invite the contact to the meeting.
Categories	Select this option to display the Categories window and place this meeting into one or more categories.
Private	Select this check box so that the details of the meeting are hidden from others who have access to your schedule, i.e. your delegates or others who have read permission to your calendar.

10. 

Click the **Send** button on the **Meeting** toolbar to send a meeting request to each of the selected attendees.

Procedure: (To schedule a meeting without a date and time)

1. Select the **Actions** menu and choose **Plan a Meeting**. The **Plan a Meeting** window displays:


Plan a Meeting
All Attendees
Click here to add a name
09:00
10:00
11:00
12:00
13:00
14:00
15:00
Add Others
Options
<<
AutoPick Next >>
Busy
Tentative
Out of Office
No Information
Make Meeting
Close

Zoom: 100% (Day View)

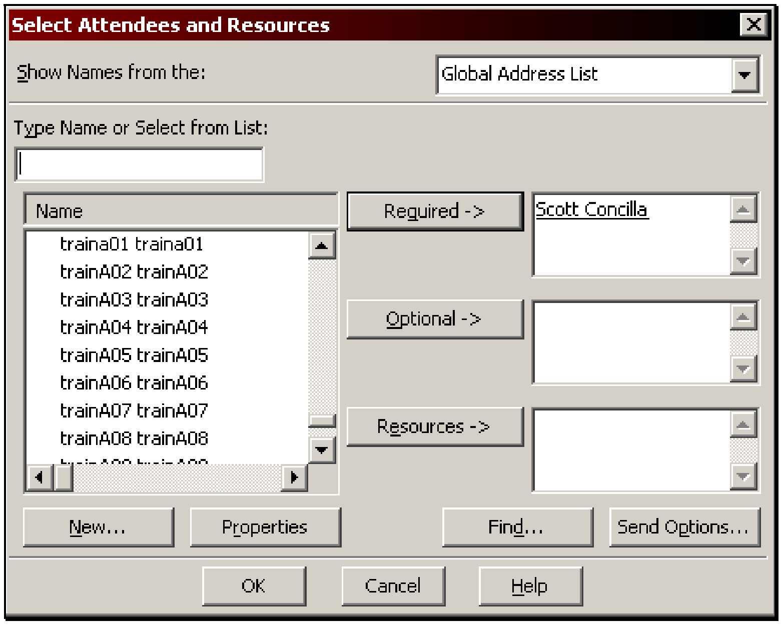
y, 07 December 2005

Scott Concilla

Meeting start time: Wed 12/07/2005 13:00

Meeting end time: Wed 12/07/2005 13:30

2. Click **Add Others** and choose **Add from Address Book**. The **Select Attendees and Resources** dialog box displays:


Select Attendees and Resources
Type Name or Select from List:
Name
Required ->
Optional ->
Resources ->
New...
Properties
Find...
Send Options...
OK
Cancel
Help

Show Names from the: Global Address List

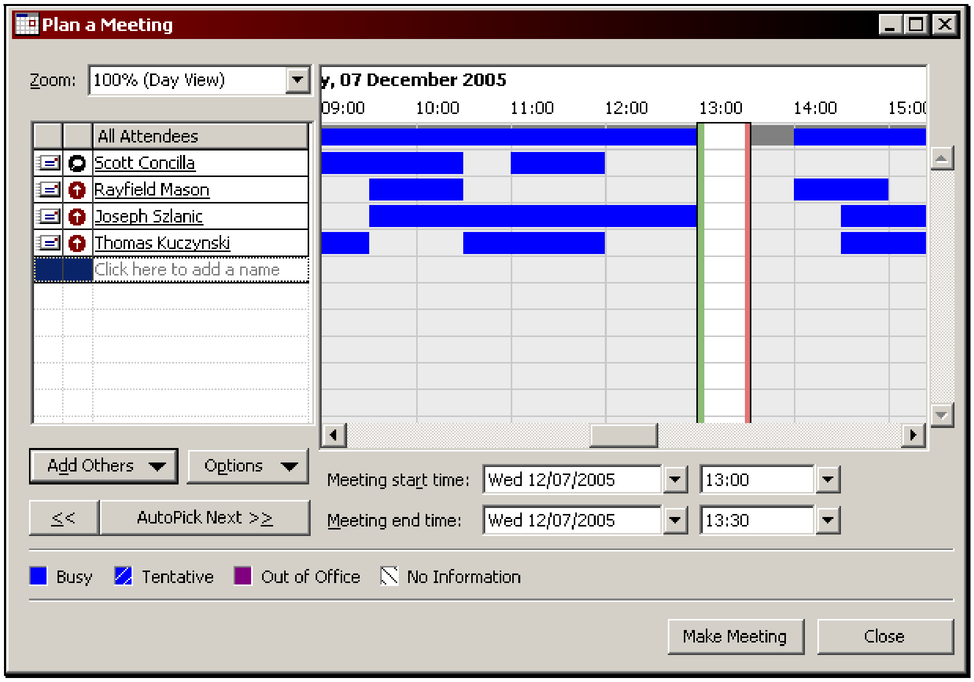
traina01 traina01
trainA02 trainA02
trainA03 trainA03
trainA04 trainA04
trainA05 trainA05
trainA06 trainA06
trainA07 trainA07
trainA08 trainA08

Required -> Scott Concilla

© 0A316

3. In the **Type Name or Select from List** area, choose the names of the other meeting attendees, and then choose either **Required**, **Optional**, or **Resources**. (See the previous procedure for a complete description of these categories).

4. Click **OK** when all attendees have been selected. The **Plan a Meeting** window displays the meeting attendees in the **All Attendees** list:



Zoom: 100% (Day View)

y, 07 December 2005

All Attendees

Scott Concilla

Rayfield Mason

Joseph Szlanic

Thomas Kuczynski

Click here to add a name

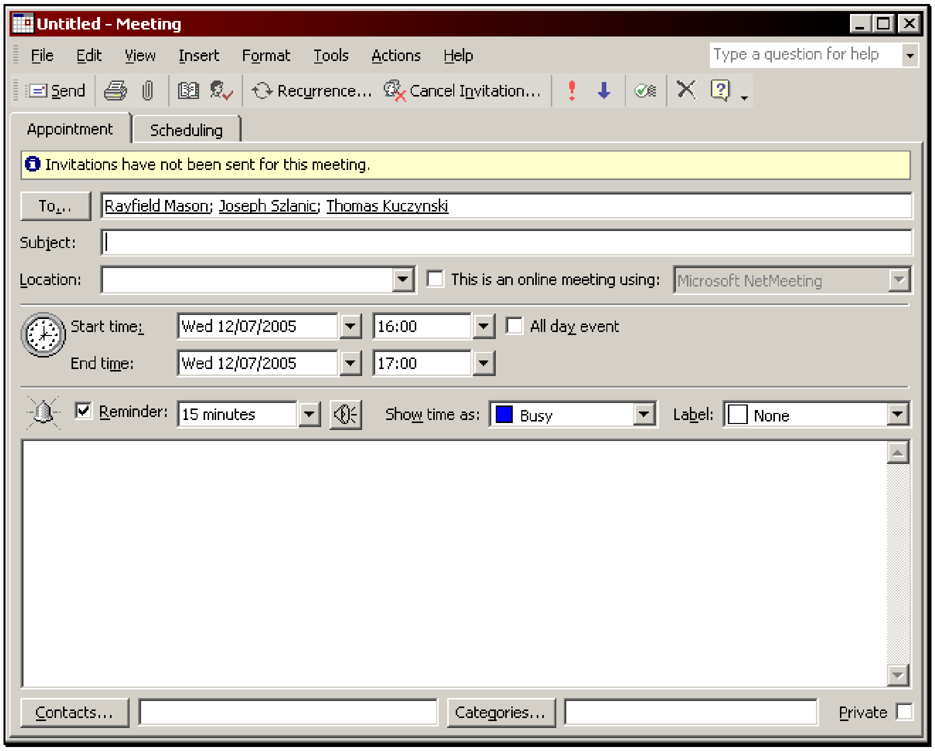
Meeting start time: Wed 12/07/2005 13:00

Meeting end time: Wed 12/07/2005 13:30

■ Busy ▨ Tentative ■ Out of Office ☐ No Information

5. Choose a time for the meeting by either dragging the Start and End bars, using the **Meeting Start Time** and **End Time** drop-down boxes, or use the **AutoPick** feature to have Outlook choose a time automatically.

6. Once a time, date, duration have been chosen, click **Make Meeting**. The **Meeting** window displays:


Untitled - Meeting
File
Edit
View
Insert
Format
Tools
Actions
Help
Type a question for help
Send
Recurrence...
Cancel Invitation...
Appointment
Scheduling
To...
Contacts...
Categories...

Invitations have not been sent for this meeting.

To... Rayfield Mason; Joseph Szlanic; Thomas Kuczynski

Subject:

Location: ☐ This is an online meeting using: Microsoft NetMeeting

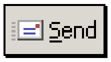
Start time: Wed 12/07/2005 16:00 ☐ All day event

End time: Wed 12/07/2005 17:00

☑ Reminder: 15 minutes Show time as: Busy Label: None

Private ☐

7. Using the table in the previous procedure, fill out the remaining fields as necessary.

8. 

Click the **Send** button on the **Meeting** toolbar to have Outlook send the meeting invitation to the invitees.

Tips:

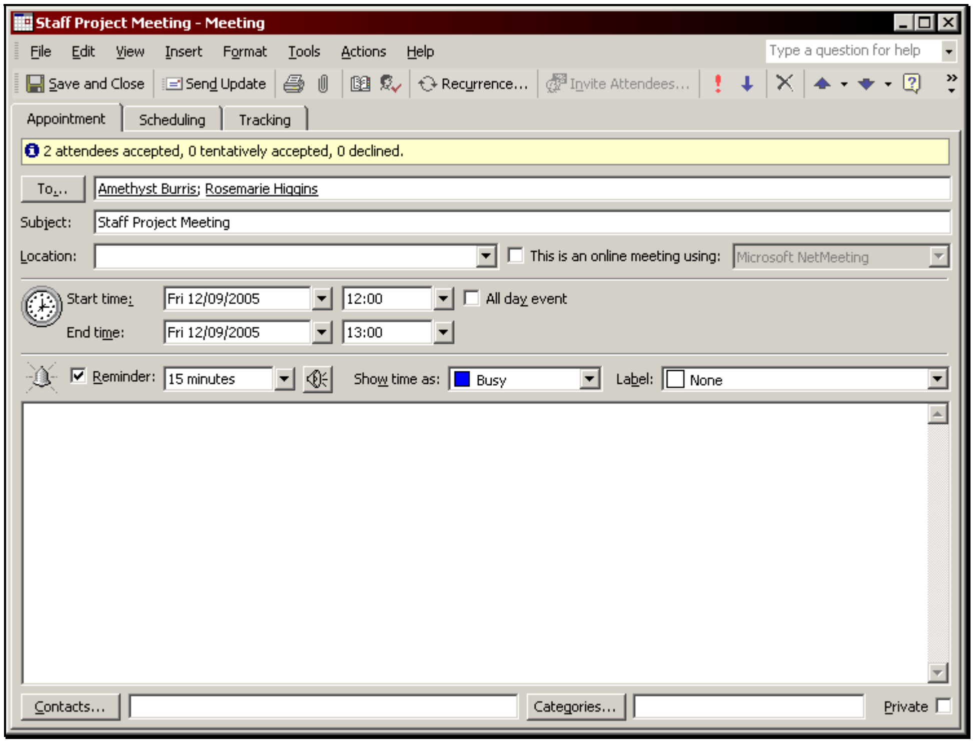
- To convert a meeting invitation into an appointment, click the **Cancel Invitation** button on the **Meeting** toolbar.
- If meeting response e-mails from invitees are not desired, select the **Actions** menu and uncheck **Meeting Responses**. Meeting attendee status can still be checked via the original meeting request.
- To prevent meeting attendees from proposing new times for a meeting, select the **Actions** menu and uncheck **Allow New Time Proposals**.
- To indicate an importance for the meeting to the invitees, click either the **Importance: High** or **Importance: Low** buttons on the **Meeting** toolbar.

Editing a Meeting Request

After the initial meeting request has been sent to the attendees, it may be necessary to change some aspect of the meeting, such as the date, time, length, or location.

Procedure:

1. **Open** the meeting. The **Meeting** window displays:


Staff Project Meeting - Meeting
File
Edit
View
Insert
Format
Tools
Actions
Help
Type a question for help
Save and Close
Send Update
Recurrence...
Invite Attendees...
Appointment
Scheduling
Tracking
To...
Contacts...
Categories...
Private ☐

2 attendees accepted, 0 tentatively accepted, 0 declined.

To...: Amethyst Burris; Rosemarie Higgins

Subject: Staff Project Meeting

Location:

☐ This is an online meeting using: Microsoft NetMeeting

Start time: Fri 12/09/2005 12:00 ☐ All day event

End time: Fri 12/09/2005 13:00

☑ Reminder: 15 minutes Show time as: Busy Label: None

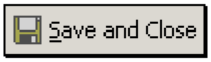
2. On the **Appointment** tab, make the desired changes to the meeting.

OR

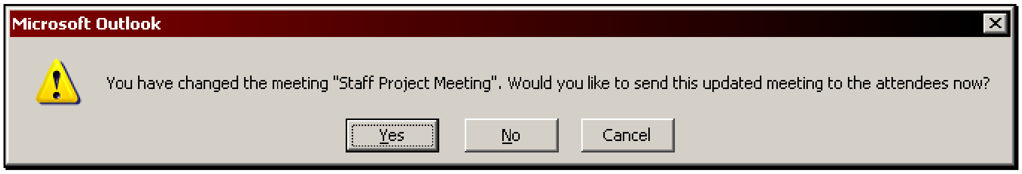
Select the **Scheduling** tab to make changes to the date, time, or length of the meeting using the **Meeting Planner**.

3.
Send Update
Click the **Send Update** button on the **Meeting** toolbar to send an e-mail notice to all meeting attendees.

OR



Click the **Save and Close** button on the **Meeting** toolbar. The following dialog box displays if changes were made to the date, time, or length of the meeting:



You have changed the meeting "Staff Project Meeting". Would you like to send this updated meeting to the attendees now?

4. Click **Yes** to send the update notice to the meeting attendees.

Warning:

- Outlook will only automatically ask to send an update to meeting invitees if changes are made to the date, time, or length of the meeting. For example, if text is added to the notes area, and the user clicks **Save and Close**, Outlook will not ask to send an update. To ensure that an update is sent to meeting invitees, it is best to click the **Send Update** button on the **Meeting** toolbar.

Tips:

- Meeting update notices will have the same e-mail icon as the original meeting invitation, however, the word **Updated** will appear at the beginning of the **Subject** line.
- Meeting update notices will contain the same response buttons (**Accept**, **Tentative**, **Decline**) as the initial meeting invitation. Meeting invitees will be able to respond to the update as they did the initial invitation.
- If the time, date, or duration has not changed, selecting **Accept** on the update notice will not add the meeting to the calendar again.

Adding or Removing Meeting Attendees

A meeting organizer can add or remove meeting attendees from a meeting once it has been scheduled.

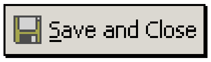
Procedure: (To add attendees to a meeting)

1. **Open** the meeting to be edited. The **Meeting** window displays.
2. Click **To**.

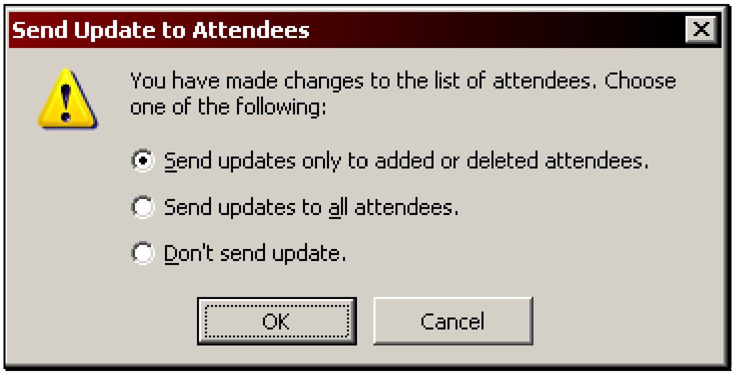
   OR

   Select the **Scheduling** tab, click **Add Others**, and then choose **Add from Address Book**.

   OR

   Select the **Actions** menu and choose **Add or Remove Attendees**. The **Select Attendees and Resources** dialog box displays.
3. Select the additional attendees and click **OK**.
4. 

   Click the **Save and Close** button on the **Meeting** toolbar. The **Send Update to Attendees** dialog box displays:



Send Update to Attendees

You have made changes to the list of attendees. Choose one of the following:

● Send updates only to added or deleted attendees.

○ Send updates to all attendees.

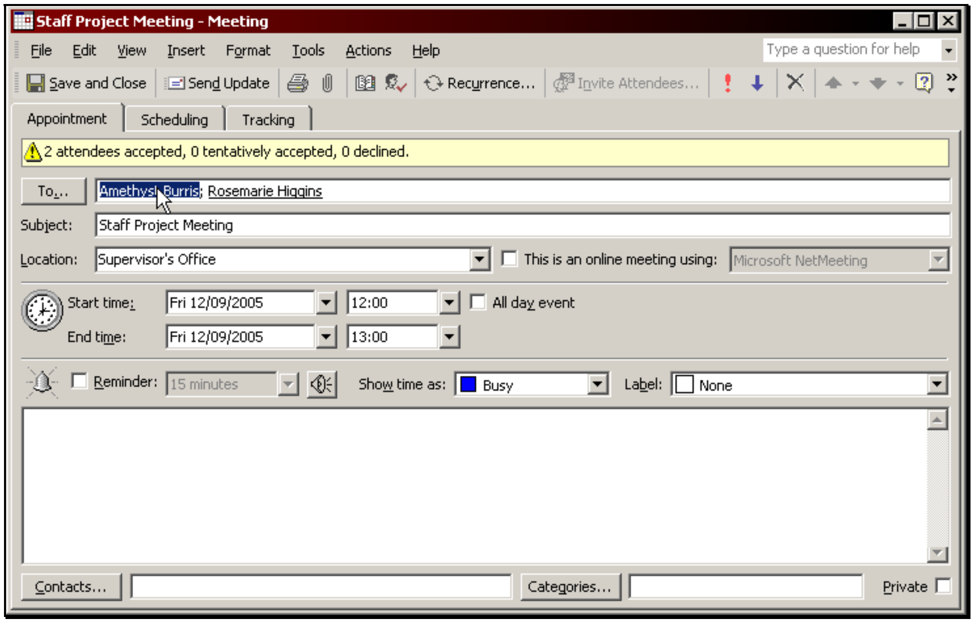
○ Don't send update.

5. Choose the desired option and click **OK**.

Procedure: (To delete attendees from a meeting)

1. **Open** the meeting to be edited. The **Meeting** window displays.

2. In the **To** field, click the attendee name to be deleted and press the **[Delete]** key.

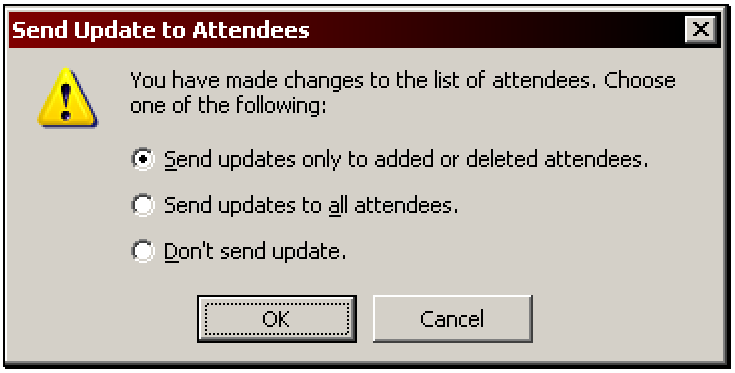

File
Edit
View
Insert
Format
Tools
Actions
Help
Type a question for help
Save and Close
Send Update
Recurrence...
Invite Attendees...
Appointment
Scheduling
Tracking
To...
Contacts...
Categories...

Staff Project Meeting - Meeting

2 attendees accepted, 0 tentatively accepted, 0 declined.

To: Amethyst Burris; Rosemarie Higgins
Subject: Staff Project Meeting
Location: Supervisor's Office
☐ This is an online meeting using: Microsoft NetMeeting
Start time: Fri 12/09/2005 12:00 ☐ All day event
End time: Fri 12/09/2005 13:00
☐ Reminder: 15 minutes
Show time as: Busy
Label: None
Private ☐

3. Save and Close Click the **Save and Close** button on the **Meeting** toolbar. The **Send Update to Attendees** dialog box displays:



Send Update to Attendees

You have made changes to the list of attendees. Choose one of the following:

● Send updates only to added or deleted attendees.
○ Send updates to all attendees.
○ Don't send update.

4. Choose the desired option and click **OK**.

Processing Meeting Request Responses

When a meeting invitation is sent, the meeting attendee initially has the choice of responding with **Accept**, **Tentative**, **Decline**, or **Propose New Time**.

Once the attendee selects one of these options, they then have the option to send a response to the meeting organizer. If either the **Send response now** or **Edit the response before sending** option is chosen by the meeting attendee, an e-mail is sent to the meeting organizer.

The following table shows the e-mail icons associated with each meeting response that a meeting organizer will see in the Inbox.

Icon	Description
✓	The meeting has been accepted. **Accepted** will appear in the **Subject** line of the e-mail.
?	The meeting has been accepted tentatively. **Tentative** will appear in the **Subject** line of the e-mail. **OR** The meeting attendee has proposed a new time for the meeting. **New Time Proposed** will appear in the **Subject** line of the e-mail.
✗	The meeting has been declined. **Declined** will appear in the **Subject** line of the e-mail.

Meeting request responses can be deleted, moved, forwarded, and replied to like standard e-mails.

Once meeting responses are read by the meeting organizer, the attendee information in the **Tracking** tab of the meeting is updated automatically.

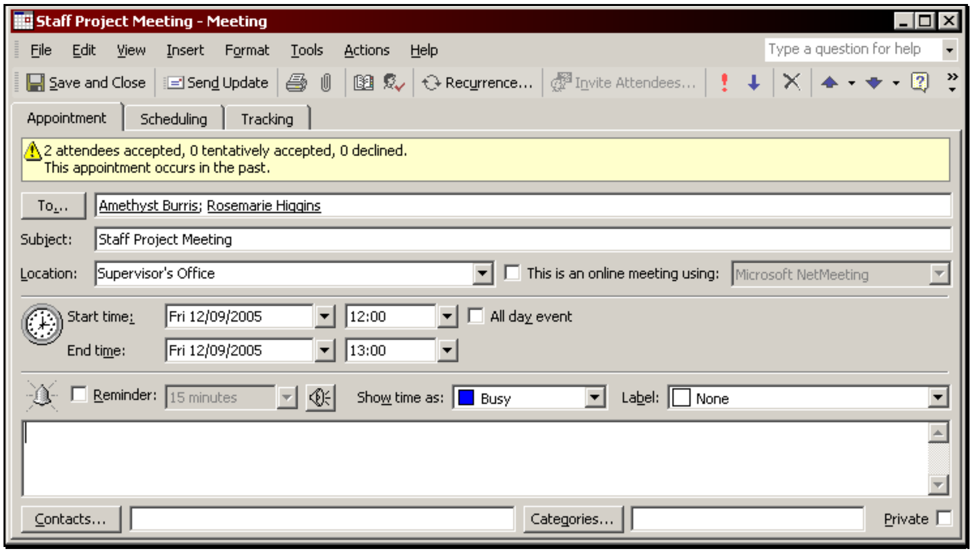
Checking Meeting Attendee Status

After a meeting request has been sent, the meeting organizer can check whether attendees have accepted or declined the meeting invitation. This procedure is more reliable than keeping track of individual meeting request responses, since the meeting attendees are not required to send a response.

The **Tracking** tab of the meeting, which is added after the meeting request has been sent, shows each invited attendee, their attendance status (required or optional), and their response status. The meeting organizer is the only person who can view the status of attendees.

Procedure:

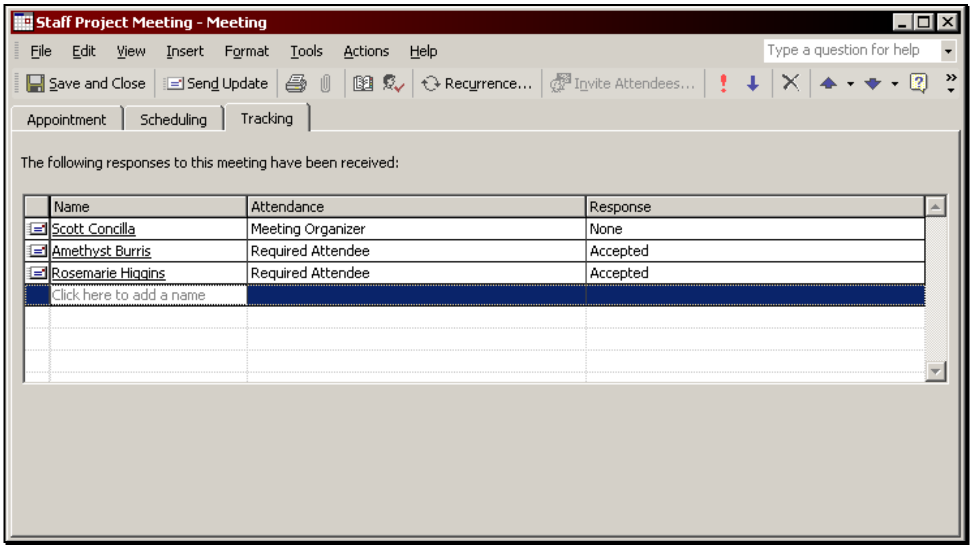
1. **Open** the meeting. The InfoBar of the meeting will contain a summary of the responses to date:


Staff Project Meeting - Meeting
File
Edit
View
Insert
Format
Tools
Actions
Help
Type a question for help
Save and Close
Send Update
Recurrence...
Invite Attendees...
Appointment
Scheduling
Tracking
To...
Contacts...
Categories...

2 attendees accepted, 0 tentatively accepted, 0 declined.
This appointment occurs in the past.

To... Amethyst Burris; Rosemarie Higgins
Subject: Staff Project Meeting
Location: Supervisor's Office ☐ This is an online meeting using: Microsoft NetMeeting
Start time: Fri 12/09/2005 12:00 ☐ All day event
End time: Fri 12/09/2005 13:00
☐ Reminder: 15 minutes Show time as: Busy Label: None
Private ☐

2. Select the **Tracking** tab to view detailed information about each attendee and their response status.


Staff Project Meeting - Meeting
File
Edit
View
Insert
Format
Tools
Actions
Help
Type a question for help
Save and Close
Send Update
Recurrence...
Invite Attendees...
Appointment
Scheduling
Tracking

The following responses to this meeting have been received:

Name	Attendance	Response
Scott Concilla	Meeting Organizer	None
Amethyst Burris	Required Attendee	Accepted
Rosemarie Higgins	Required Attendee	Accepted
Click here to add a name		

3.
Save and Close
Click the **Save and Close** button on the **Meeting** toolbar when finished.

Tip:

- In some cases, the information on the **Tracking** tab may appear to not be current, especially when a meeting attendee has chosen not to send a response. Check the meeting again later to see if the responses have updated by the server.

Managing New Meeting Time Proposals

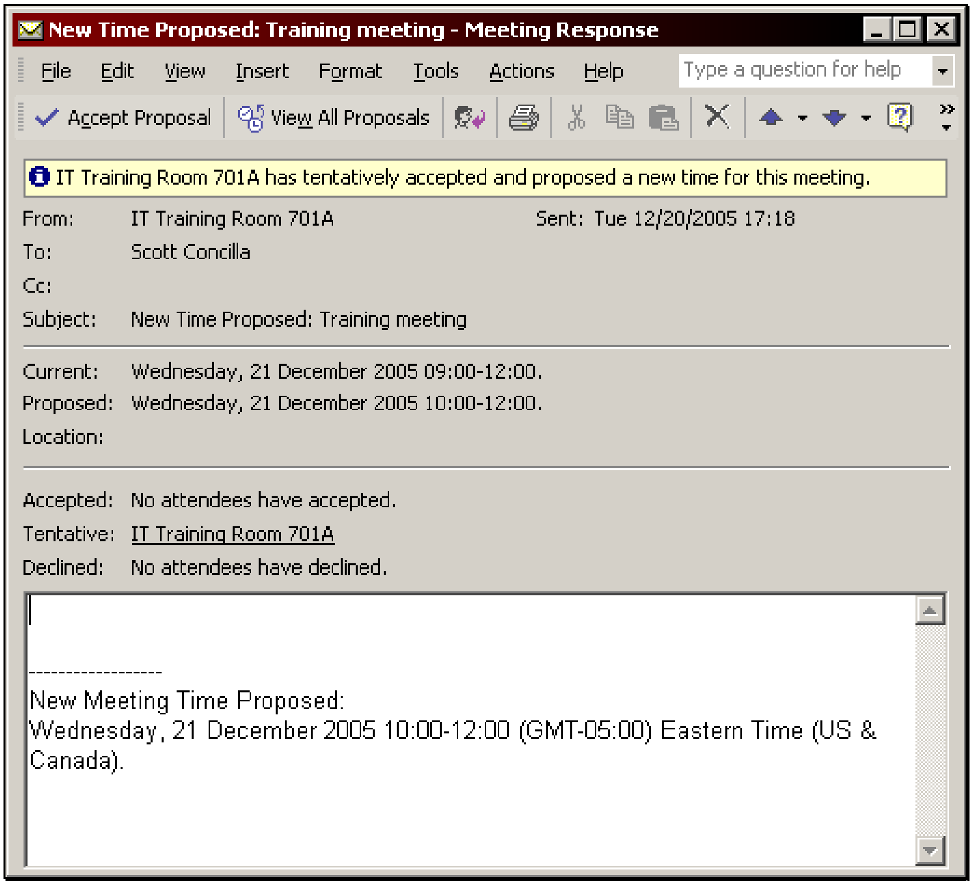
If enabled, meeting attendees have the option of proposing new dates and times for meetings that they have been invited to. For example, a meeting attendee's calendar may show them as **Free** or available, but they may have reasons for wanting the meeting on another date and time.

If new meeting time proposals are received, the meeting organizer will need to review the proposals and either accept the proposed date and time or do nothing to leave the meeting at its scheduled time.

When a proposal is accepted, the meeting organizer should send an update to the attendees informing them of the change. The attendees will again be able to **Accept** or **Decline** the updated meeting invitation.

Procedure: (To review and accept a single proposal)

1. **Open** the meeting response e-mail. The InfoBar will indicate the attendee has tentatively accepted the meeting and proposed a new time.



IT Training Room 701A has tentatively accepted and proposed a new time for this meeting.

From: IT Training Room 701A
Sent: Tue 12/20/2005 17:18
To: Scott Concilla
Cc:
Subject: New Time Proposed: Training meeting

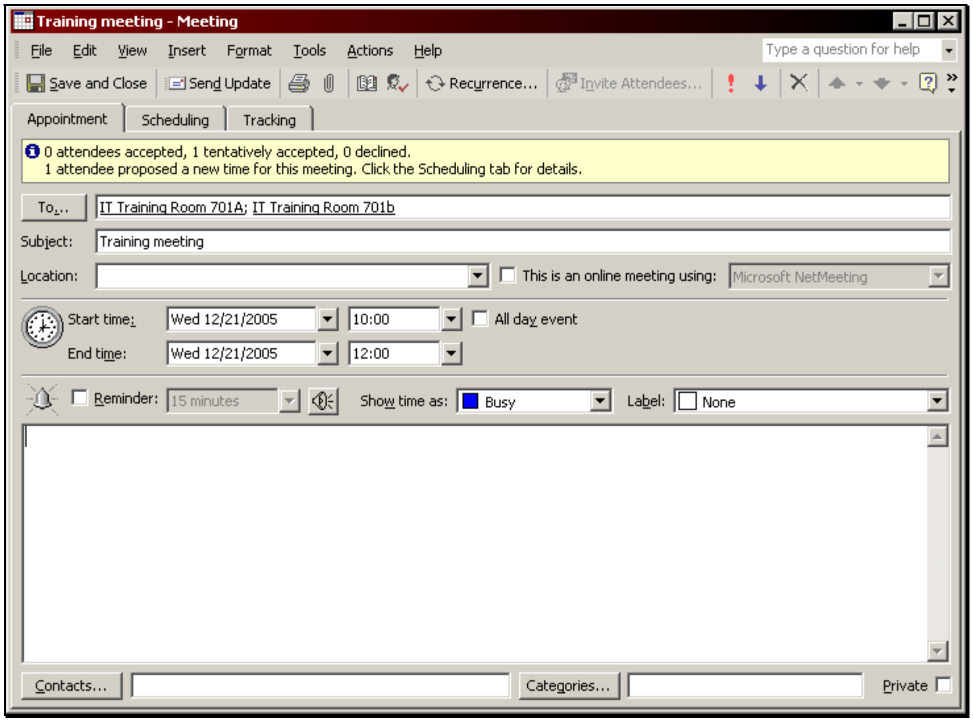
Current: Wednesday, 21 December 2005 09:00-12:00.
Proposed: Wednesday, 21 December 2005 10:00-12:00.
Location:

Accepted: No attendees have accepted.
Tentative: IT Training Room 701A
Declined: No attendees have declined.

New Meeting Time Proposed:
Wednesday, 21 December 2005 10:00-12:00 (GMT-05:00) Eastern Time (US & Canada).

2. Review the **Current** and **Proposed** information for the meeting.

3.
Accept Proposal
To accept the proposed date and time, click the **Accept Proposal** button on the **Meeting Response** toolbar. The **Meeting** window displays:


Training meeting - Meeting
File
Edit
View
Insert
Format
Tools
Actions
Help
Type a question for help
Save and Close
Send Update
Recurrence...
Invite Attendees...
Appointment
Scheduling
Tracking
To...
Contacts...
Categories...

0 attendees accepted, 1 tentatively accepted, 0 declined.
1 attendee proposed a new time for this meeting. Click the Scheduling tab for details.

To...: IT Training Room 701A; IT Training Room 701b

Subject: Training meeting

Location:

☐ This is an online meeting using: Microsoft NetMeeting

Start time: Wed 12/21/2005 10:00 ☐ All day event

End time: Wed 12/21/2005 12:00

☐ Reminder: 15 minutes Show time as: Busy Label: None

Private ☐

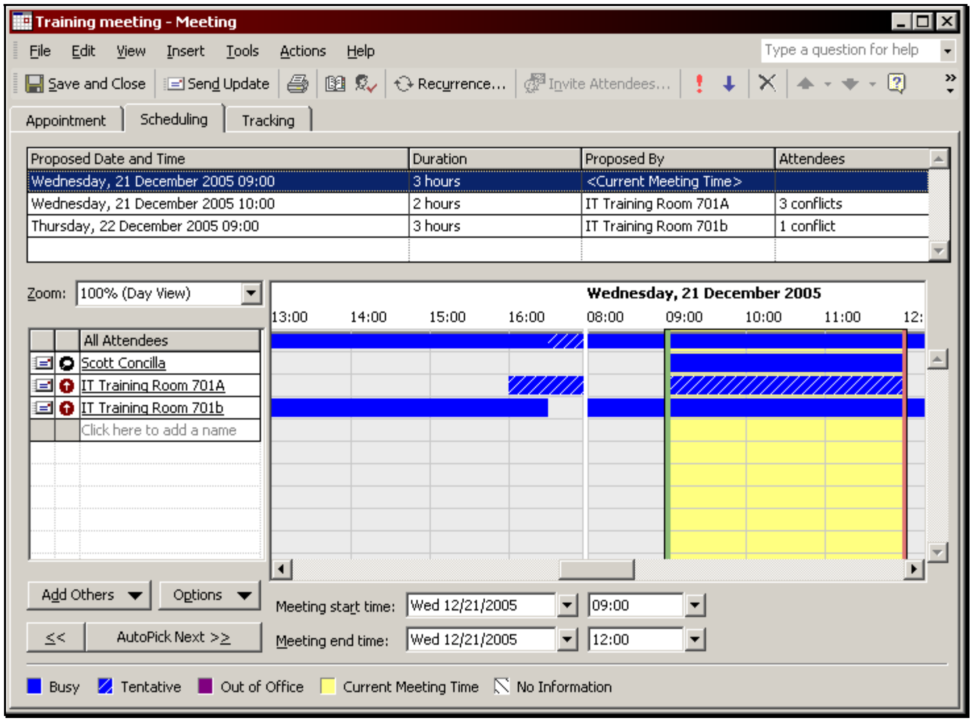
4. Type a message to the meeting attendees and/or set any additional meeting options as desired.

5.
Send Update
Click the **Send Update** button on the **Meeting** toolbar to send an updated meeting request notice to the meeting attendees.

Procedure: (To review multiple proposals)

1. **Open** any of the **New Time Proposed** e-mails.

2. View All Proposals Click the **View All Proposals** button on the **Meeting Response** toolbar. The **Meeting** window displays with the **Scheduling** tab open:


Training meeting - Meeting
File Edit View Insert Tools Actions Help
Type a question for help
Save and Close
Send Update
Recurrence...
Invite Attendees...
Appointment
Scheduling
Tracking
Wednesday, 21 December 2005
13:00 14:00 15:00 16:00 08:00 09:00 10:00 11:00 12:
Add Others
Options
<<
AutoPick Next >>

Proposed Date and Time	Duration	Proposed By	Attendees
Wednesday, 21 December 2005 09:00	3 hours	<Current Meeting Time>	
Wednesday, 21 December 2005 10:00	2 hours	IT Training Room 701A	3 conflicts
Thursday, 22 December 2005 09:00	3 hours	IT Training Room 701b	1 conflict

Zoom: 100% (Day View)

All Attendees
Scott Concilla
IT Training Room 701A
IT Training Room 701b
Click here to add a name

Meeting start time: Wed 12/21/2005 09:00
Meeting end time: Wed 12/21/2005 12:00

■ Busy ▨ Tentative ■ Out of Office □ Current Meeting Time ⧄ No Information

3. Review the proposals in the **Proposed Date and Time** area. Click a proposal to display it in the scheduling grid.

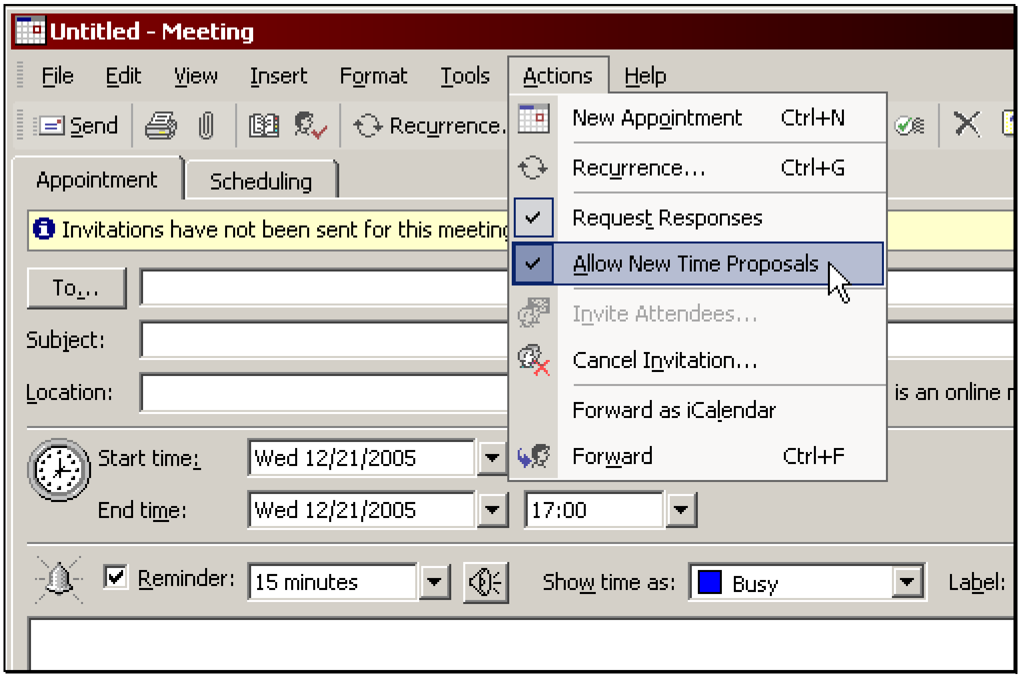
4. To accept a proposal, select it in the **Proposed Date and Time** area.

5. Click the **Appointment** tab. The **Start** and **End Time** of the meeting will change to reflect the selected proposal.

6. Send Update Click the **Send Update** button on the **Meeting** toolbar to send an updated meeting request notice to the meeting attendees.

Tips:

- To reject a proposed date and time for a meeting, simply close the meeting response e-mail or close the **Meeting** window and do not select one of the proposals.
- The meeting organizer may click the **Reply** button on the **Meeting Response** toolbar and write a message to the meeting attendee explaining why the proposal was not accepted.
- To prevent meeting attendees from proposing new times for a meeting, select the **Actions** menu when creating the meeting and uncheck **Allow New Time Proposals**.


Untitled - Meeting
File
Edit
View
Insert
Format
Tools
Actions
Help
Send
Recurrence...
Appointment
Scheduling
New Appointment Ctrl+N
Recurrence... Ctrl+G
✓ Request Responses
✓ Allow New Time Proposals
Invite Attendees...
Cancel Invitation...
Forward as iCalendar
Forward Ctrl+F
To...
Label:

Invitations have not been sent for this meeting

Subject:

Location:

is an online

Start time: Wed 12/21/2005

End time: Wed 12/21/2005 17:00

☑ Reminder: 15 minutes

Show time as: Busy

- Outlook can be configured so that new meeting time proposals are always disabled for authored meetings. See **Chapter 9 – Customizing the Calendar** for more information.

Cancelling a Meeting

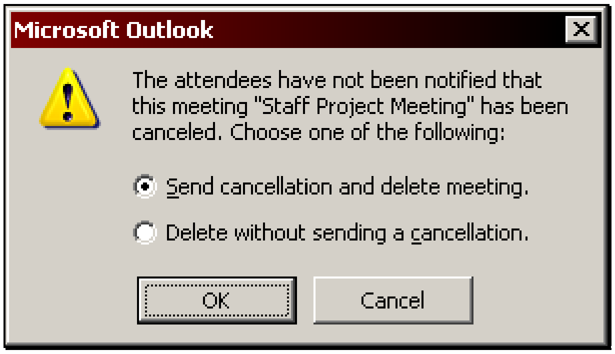
When a meeting must be cancelled, a message can be generated to all attendees notifying them of the cancellation. The meeting cancellation notice allows meeting attendees to easily remove the meeting from their calendars.

Procedure:

1. **Open** the meeting to be cancelled. Select the **Actions** menu and choose **Cancel Meeting**.

   OR

   Select the meeting and press the **[Delete]** key. The following dialog box displays:



The attendees have not been notified that this meeting "Staff Project Meeting" has been canceled. Choose one of the following:

● Send cancellation and delete meeting.

○ Delete without sending a cancellation.

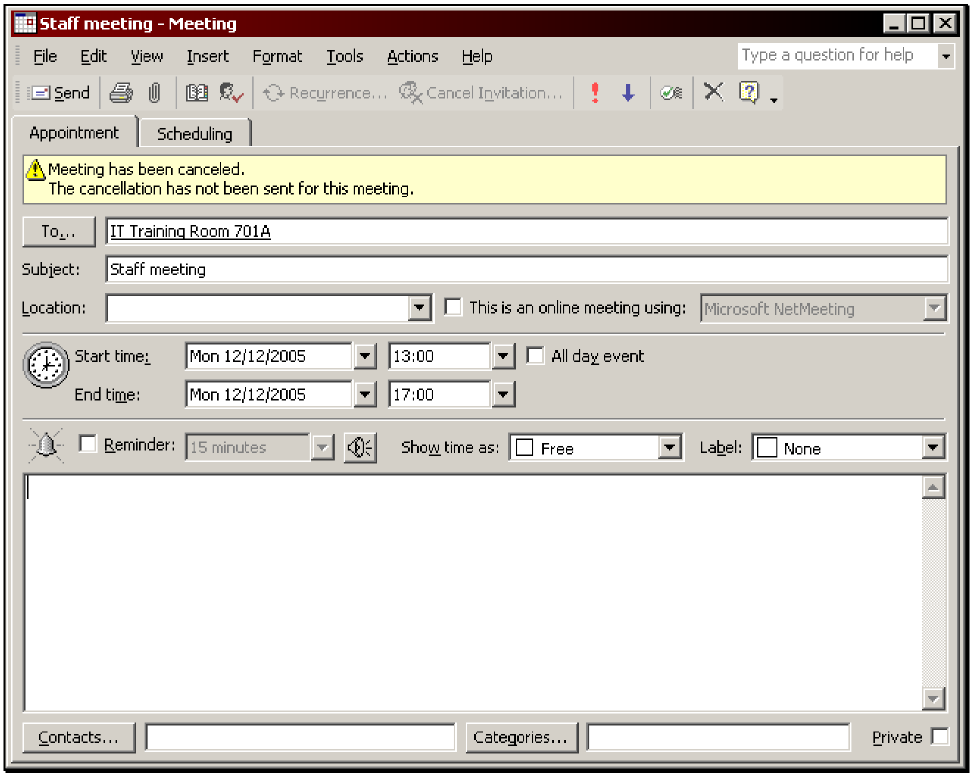
2. Choose **Send cancellation and delete meeting** to send a notification message to the attendees as well as delete the meeting from the calendar.

   OR

   Choose **Delete without sending a cancellation** to remove the meeting from the calendar without notifying the attendees that the meeting has been cancelled.

3. Click **OK**.

4. If the cancellation notice option was selected, the **Meeting** window displays:


Staff meeting - Meeting
File Edit View Insert Format Tools Actions Help
Type a question for help
Send
Recurrence...
Cancel Invitation...
Appointment
Scheduling
To...
Contacts...
Categories...

Meeting has been canceled.
The cancellation has not been sent for this meeting.

To...: IT Training Room 701A

Subject: Staff meeting

Location:

☐ This is an online meeting using: Microsoft NetMeeting

Start time: Mon 12/12/2005 13:00 ☐ All day event

End time: Mon 12/12/2005 17:00

☐ Reminder: 15 minutes Show time as: Free Label: None

Private ☐

5. If desired, type a reason for the cancellation in the notes area.

6. Send Click the **Send** button on the **Meeting** toolbar to send the cancellation notice to the attendees.

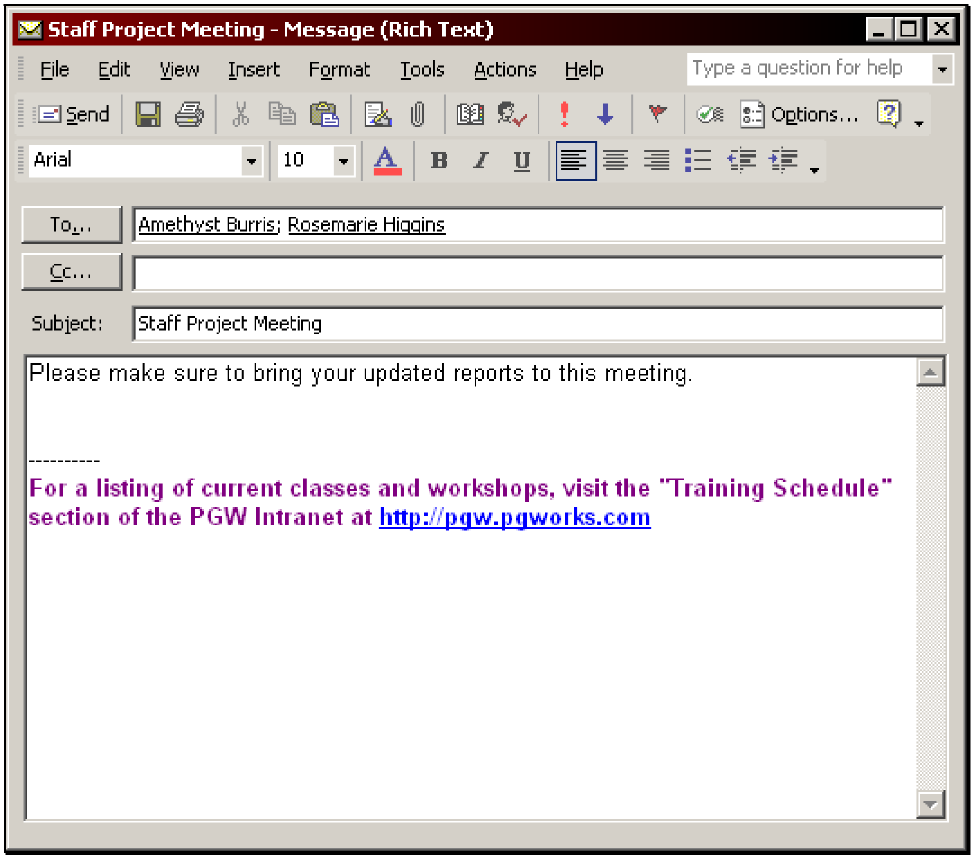
Sending a Message to Meeting Attendees

Once a meeting has been scheduled, Outlook provides a convenient way to send an e-mail message to the meeting attendees without having to create an e-mail from scratch.

Procedure:

1. **Open** the meeting.

2. Select the **Actions** menu and choose **New Message to Attendees**. A message window with the meeting attendees in the **To** line and the meeting subject in the **Subject** line displays:


Staff Project Meeting - Message (Rich Text)
File
Edit
View
Insert
Format
Tools
Actions
Help
Type a question for help
Send
Options...
Arial
10
B
I
U

To...: Amethyst Burris; Rosemarie Higgins

Cc...:

Subject: Staff Project Meeting

Please make sure to bring your updated reports to this meeting.

For a listing of current classes and workshops, visit the "Training Schedule" section of the PGW Intranet at http://pgw.pgworks.com

3. Type the message and add any additional message options as desired.

4. Send Click the **Send** button on the **Message** toolbar to send the e-mail.

Working as a Meeting Attendee

The next set of topics in this chapter pertain to the role of **Meeting Attendee**. Meeting attendees are those people who have been invited to the meeting by the meeting organizer.

Meeting attendees do not have any control over the meeting scheduling, but can control their attendance at the meeting.

The topics covered in this section are:

- Responding to a Meeting Request
- Proposing a New Meeting Time
- Cancelling Attendance at a Meeting
- Receiving a Meeting Cancellation

Chapter 4 – Working with Meetings

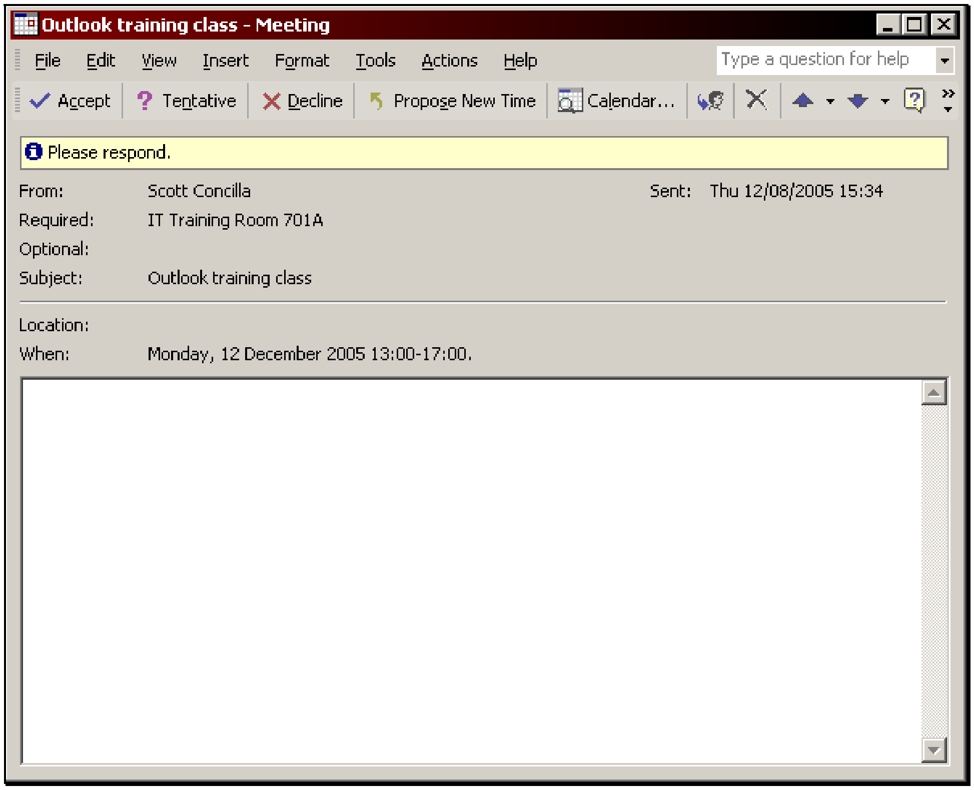
Responding to a Meeting Request

Meeting requests are sent via Outlook e-mail and are received in the Inbox like other messages. An enhancement to Outlook XP is the ability to respond to meeting requests from the Preview Pane.

When a meeting request appears in the Inbox, the selects a response which is then sent back to the meeting organizer. If the invitation is accepted, the meeting is automatically entered into the calendar.

Procedure:

1. From the **Inbox**, open the meeting request. Any conflicts will be listed in the InfoBar.


Outlook training class - Meeting
File
Edit
View
Insert
Format
Tools
Actions
Help
Type a question for help
Accept
Tentative
Decline
Propose New Time
Calendar...

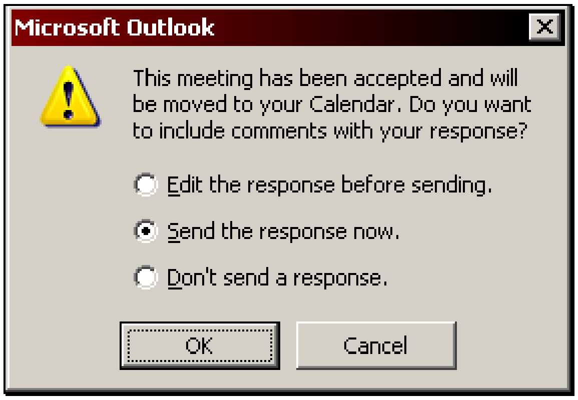
Please respond.

From: Scott Concilla
Sent: Thu 12/08/2005 15:34
Required: IT Training Room 701A
Optional:
Subject: Outlook training class
Location:
When: Monday, 12 December 2005 13:00-17:00.

2. Choose one of the following options as a response to the meeting request:

Option	Description
Accept	Accepts the meeting and places it on the calendar.
Tentative	Tentatively accepts the meeting and places it on the calendar.
Decline	Declines the meeting and does not place it on the calendar.
Propose New Time	Opens the Meeting Planner to search for and propose an alternate time and/or date for the meeting. (See the next topic for more information).
Calendar	Displays the calendar with the meeting scheduled tentatively.
Forward (button image only)	Forwards the meeting invitation to another user to invite them as an optional attendee.

3. If **Accept**, **Tentative**, or **Decline** is selected, the following dialog box displays. (The **Tentative** and **Decline** options will have slightly different wording, but the options will be the same).



This meeting has been accepted and will be moved to your Calendar. Do you want to include comments with your response?

○ Edit the response before sending.

● Send the response now.

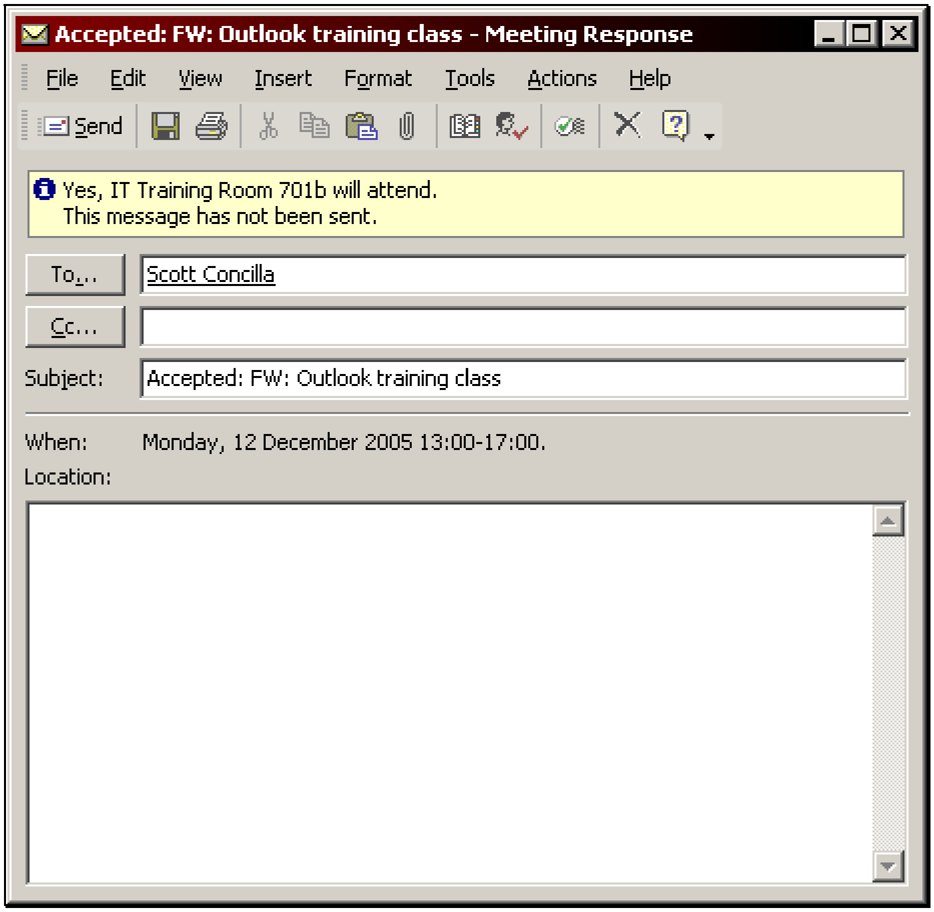
○ Don't send a response.

The following table describes these options:

Option	Description
Edit the response before sending	Allows the attendee to write a message back to the meeting organizer in conjunction with their response to the meeting request.
Send the response now	Sends an automated response to the meeting organizer with the selected choice in the subject of the e-mail.
Don't send a response	Performs the selected choice but does not send an e-mail response to the meeting organizer.

4. Choose the appropriate option and click **OK.**

5. If the **Edit the response before sending** option was selected, Outlook displays a **Meeting Response** window. The previous choice of **Accept**, **Tentative**, or **Decline** will be included in the **Subject** of the message.


Accepted: FW: Outlook training class - Meeting Response
File
Edit
View
Insert
Format
Tools
Actions
Help
Send

Yes, IT Training Room 701b will attend.
This message has not been sent.

To... Scott Concilla

Cc...

Subject: Accepted: FW: Outlook training class

When: Monday, 12 December 2005 13:00-17:00.

Location:

6. Write a response and set any other message options as desired.

7. Click the **Send** button on the **Meeting Response** toolbar to reply to the meeting organizer.

Tips:

- The Preview Pane can be used to respond to a meeting invitation, however, only the **Accept**, **Tentative**, **Decline**, and **Propose New Time** buttons will be displayed.
- Outlook can automatically accept non-conflicting meeting requests, as well as decline conflicting requests. See **Chapter 9 – Customizing the Calendar** for more information.
- Outlook can be configured so that only delegates receive meeting invitations and handle responses. See **Chapter 7** for more information.
- By default, Outlook will automatically delete a meeting invitation from the Inbox once a response has been sent. This can be changed in the calendar options. See **Chapter 9** for more information.

Proposing a New Meeting Time

If enabled by the meeting organizer, meeting invitees have the option of proposing new times and/or dates for a meeting. For instance, a meeting attendee's calendar may show them as free at a certain time, but the attendee might prefer to have the meeting at another time.

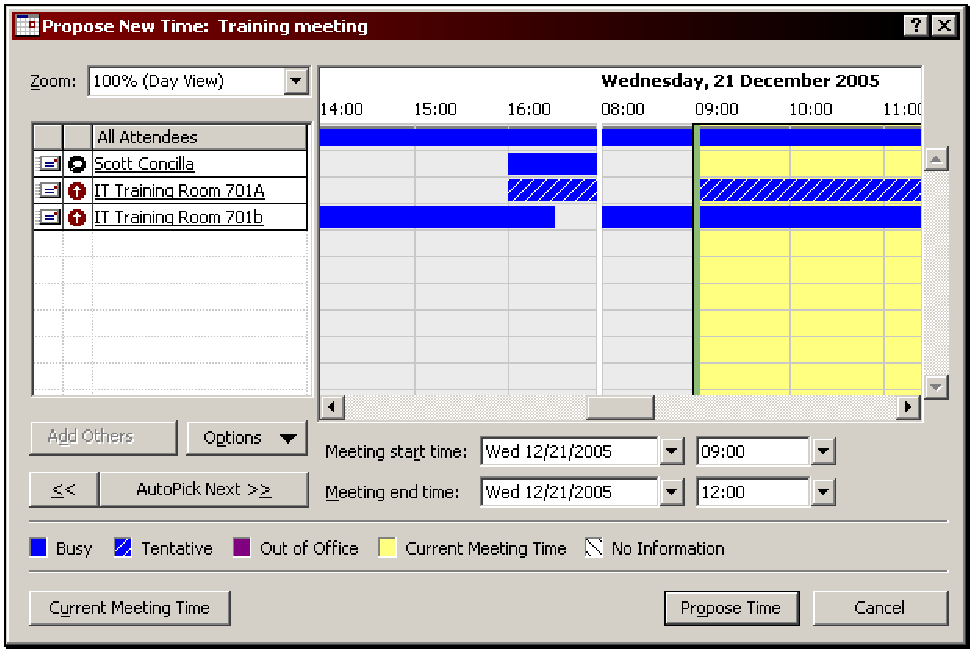
The **Propose New Time** window is a modified Meeting Planner window. See **Understanding the Meeting Planner** earlier in this chapter for more details about the features of this window.

Procedure:

1.
Propose New Time
Open the meeting request notice and click the **Propose New Time** button on the toolbar.

OR

In the Preview Pane click **Propose New Time**. The **Propose New Time** window displays:


Propose New Time: Training meeting
? ×
Wednesday, 21 December 2005
14:00
15:00
16:00
08:00
09:00
10:00
11:00
All Attendees
Add Others
Options
<<
AutoPick Next >>
Busy
Tentative
Out of Office
Current Meeting Time
No Information
Current Meeting Time
Propose Time
Cancel

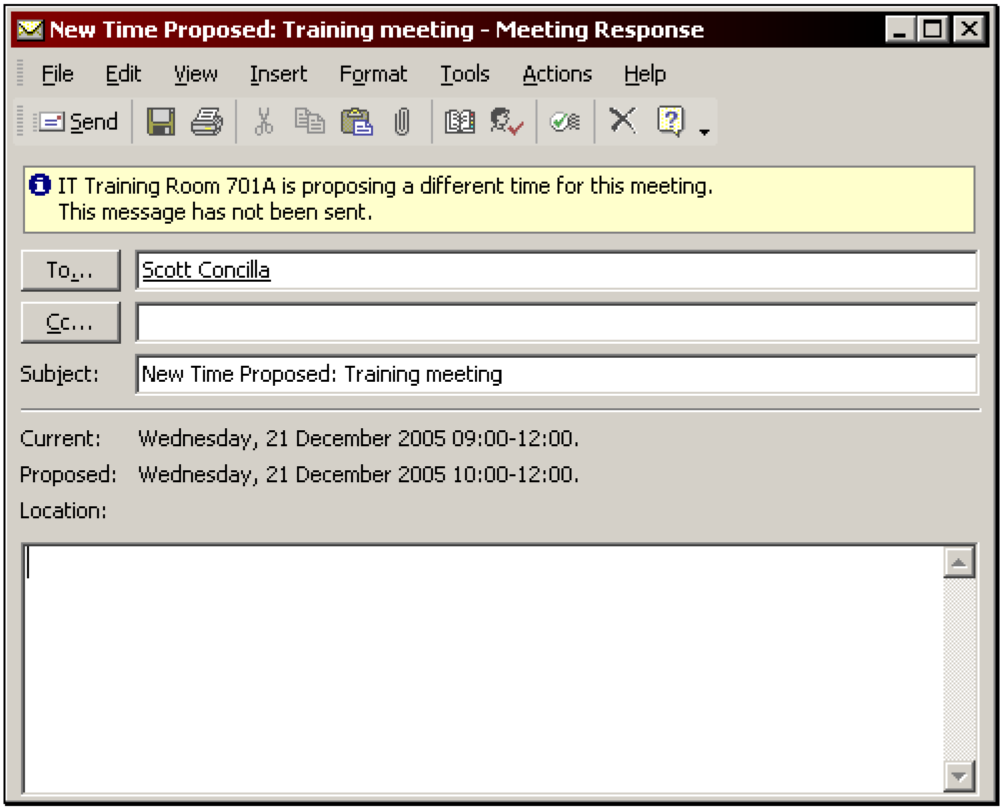
Zoom: 100% (Day View)

Scott Concilla
IT Training Room 701A
IT Training Room 701b

Meeting start time: Wed 12/21/2005 09:00
Meeting end time: Wed 12/21/2005 12:00

2. Use either the **Start** and **End** bars, **AutoPick**, or the **Meeting Start** and **End** time drop-down boxes to select a new time for the meeting. To restore the original meeting time, click **Current Meeting Time**.

3. Click **Propose Time**. The **Meeting Response** window displays:


New Time Proposed: Training meeting - Meeting Response
File
Edit
View
Insert
Format
Tools
Actions
Help
Send
To...
Cc...

IT Training Room 701A is proposing a different time for this meeting.
This message has not been sent.

To: Scott Concilla

Cc:

Subject: New Time Proposed: Training meeting

Current: Wednesday, 21 December 2005 09:00-12:00.
Proposed: Wednesday, 21 December 2005 10:00-12:00.
Location:

4. Type a message if desired and set any message options as needed.

5. Click the **Send** button on the **Meeting Response** toolbar to send the proposal to the meeting organizer.

Tips:

- To quit creating a new time proposal and return to the original meeting invitation, click **Cancel** in the **Propose New Time** window.
- To cancel a new time proposal before it is sent, **Close** the e-mail without sending it.

Cancelling Attendance at a Meeting

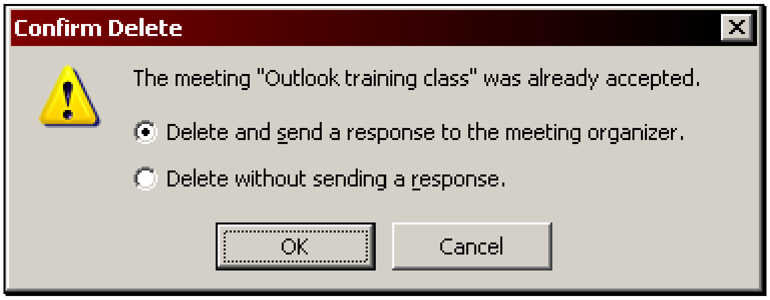
After a meeting has been accepted and placed on the calendar, a meeting attendee may choose at a later date to cancel their attendance. Use either of the procedures below to cancel meeting attendance.

Procedure:

1. **Select** the meeting in the calendar.
2. Click the **Delete** button on the **Calendar** toolbar.

OR

Press the **[Delete]** key. The **Confirm Delete** dialog box displays:

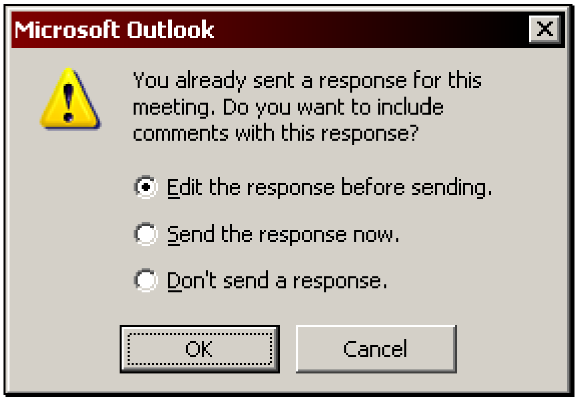


The meeting "Outlook training class" was already accepted.

● Delete and send a response to the meeting organizer.

○ Delete without sending a response.

3. Choose the desired option and click **OK**.
4. If the **Delete and send a response** option was selected, the following dialog box displays:



You already sent a response for this meeting. Do you want to include comments with this response?

● Edit the response before sending.

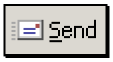
○ Send the response now.

○ Don't send a response.

5. Choose the desired option and click **OK**.

6. If **Edit the response before sending** option was selected, Outlook displays a **Meeting Response** window with **Declined** in the **Subject**.

7. Write a response and set any other message options as desired.

8. 

Click the **Send** button on the **Meeting Response** toolbar to reply to the meeting organizer.

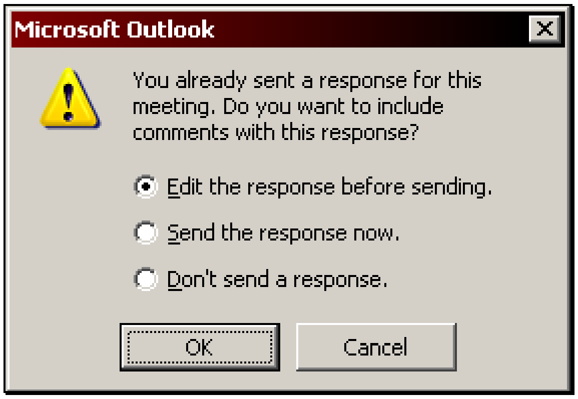
Procedure:

1. **Open** the meeting on the calendar.

2. Select the **Actions** menu of the meeting and choose **Decline**.

OR

Click the **Decline** button on the **Meeting** toolbar. The following dialog box displays:


Microsoft Outlook

You already sent a response for this meeting. Do you want to include comments with this response?

● Edit the response before sending.

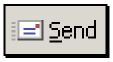
○ Send the response now.

○ Don't send a response.

3. Choose the desired option and click **OK**.

4. If **Edit the response before sending** was selected, Outlook displays a **Meeting Response** window with **Declined** in the **Subject**.

5. Write a response and set any other message options as desired.

6. 

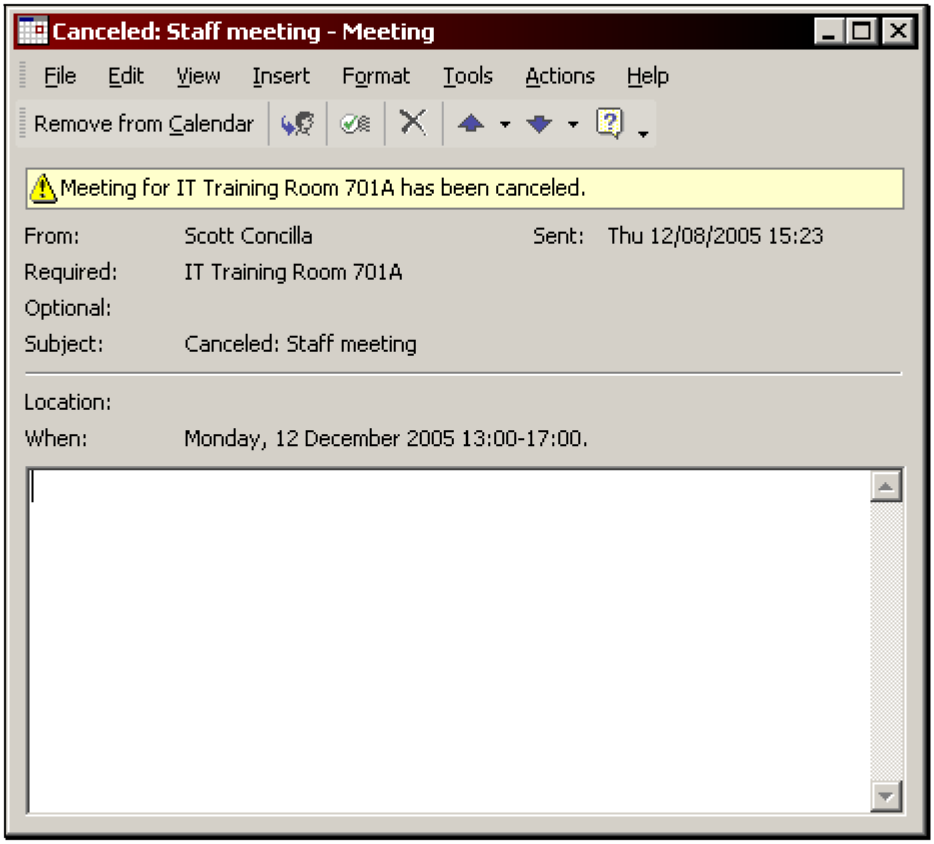
Click the **Send** button on the **Meeting Response** toolbar to reply to the meeting organizer.

Receiving a Meeting Cancellation

When a meeting is cancelled by the organizer, Outlook will send a notice to all meeting attendees if the organizer has selected the **Send cancellation and delete meeting** option.

Procedure:

1. In the Inbox, open the meeting cancellation notice. The **Canceled: Meeting** notice displays:


Canceled: Staff meeting - Meeting
File
Edit
View
Insert
Format
Tools
Actions
Help
Remove from Calendar

Meeting for IT Training Room 701A has been canceled.

From: Scott Concilla
Sent: Thu 12/08/2005 15:23
Required: IT Training Room 701A
Optional:
Subject: Canceled: Staff meeting

Location:
When: Monday, 12 December 2005 13:00-17:00.

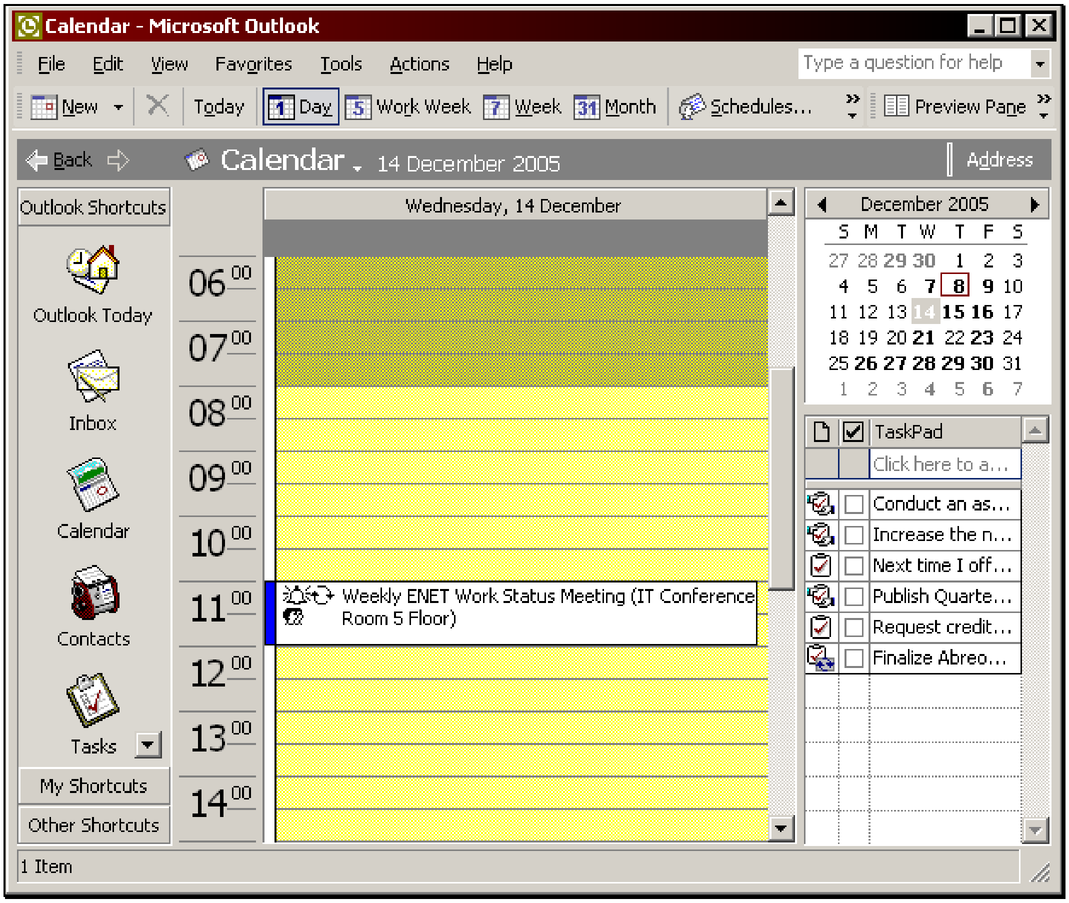
2. Remove from Calendar Click the **Remove from Calendar** button on the **Meeting Cancellation** toolbar to have Outlook automatically delete the meeting from the calendar.

3. The meeting cancellation notice is automatically moved to the **Deleted Items** folder.

Working with Recurring Meetings

Like appointments and events, meetings can be made to recur on a regular basis, such as weekly or monthly. Recurring meetings are created, edited and modified, and deleted in the same manner as recurring appointments.

Recurring meetings will have the recurring symbol next to the subject of the meeting in the calendar.


Calendar - Microsoft Outlook
File
Edit
View
Favorites
Tools
Actions
Help
Type a question for help
New
Today
Day
Work Week
Week
Month
Schedules...
Preview Pane
Back
Calendar
14 December 2005
Address
Outlook Shortcuts
Outlook Today
Inbox
Calendar
Contacts
Tasks
My Shortcuts
Other Shortcuts
Wednesday, 14 December
06 00
07 00
08 00
09 00
10 00
11 00
12 00
13 00
14 00
Weekly ENET Work Status Meeting (IT Conference Room 5 Floor)
December 2005
S M T W T F S
27 28 29 30 1 2 3
4 5 6 7 8 9 10
11 12 13 14 15 16 17
18 19 20 21 22 23 24
25 26 27 28 29 30 31
1 2 3 4 5 6 7
TaskPad
Click here to a...
Conduct an as...
Increase the n...
Next time I off...
Publish Quarte...
Request credit...
Finalize Abreo...
1 Item

Please refer to the topics **Creating a Recurring Appointment**, **Editing a Recurring Appointment**, and **Deleting a Recurring Appointment** in **Chapter 2 – Working with Appointments** of this manual for the specific procedures.

For meeting organizers, when creating a recurring meeting, choose **New Recurring Meeting** instead of New Recurring Appointment.

For meeting attendees, attendance at recurring meetings is the same as regular meetings. Attendance at a single occurrence or the entire meeting series can be modified using the previously outlined procedures.

Chapter 5

Using Calendar Coloring

Chapter Objectives:

- Assigning Color to Calendar Items
- Editing the Calendar Coloring Labels
- Assigning Color Automatically

Overview

A new feature of Outlook XP is the ability to use color as a tool to identify appointments, meetings, and events. The easiest way to assign color to a calendar item is to use the **Label** drop-down list in the item window.

The labels can be customized to suit an individual users' needs. Each item can have only one label, but exceptions can be used to apply a color to individual item in a series that is different from the default color of the series.

Rules can also be created that direct Outlook to assign color and labels automatically based on the criteria specified by the user.

Assigning Color to Calendar Items

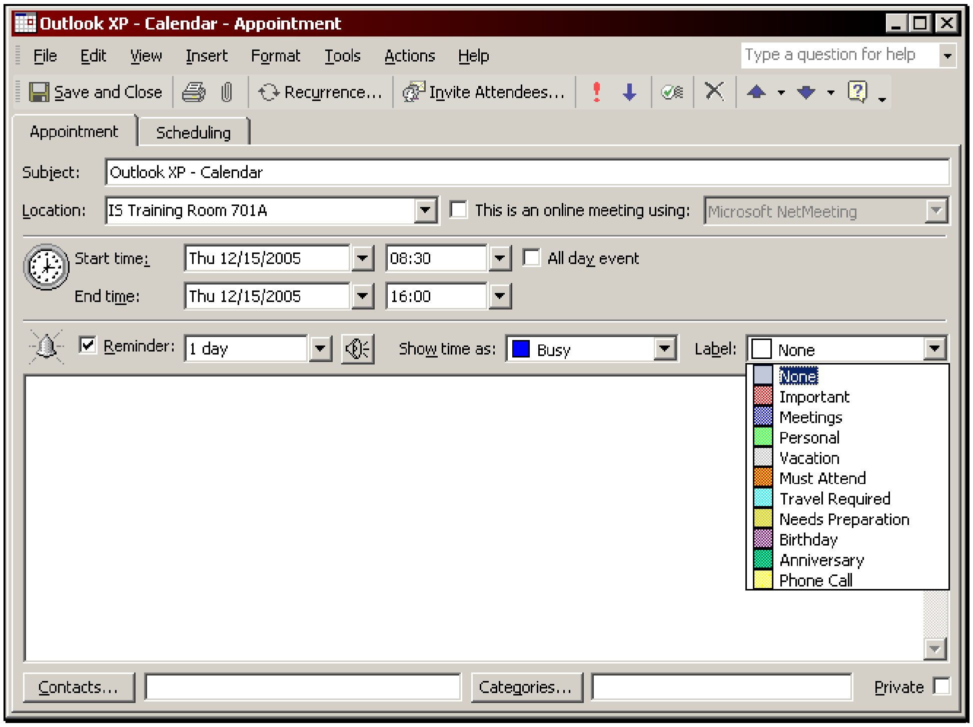
Calendar items can be colored with one of 10 predefined colors, each of which has a corresponding text label. The default label choices are:

- Important
- Business
- Personal
- Vacation
- Must Attend
- Travel Required
- Needs Preparation
- Birthday
- Anniversary
- Phone Call

Color can be assigned to a calendar item when it is created via the **Label** drop-down list box, it can be added later using the **Calendar Coloring** button on the **Calendar** toolbar, or it can be added using the pop-up menu.

Procedure: (To assign color using the Label drop-down list)

1. **Open** the calendar item. The corresponding window displays:


Outlook XP - Calendar - Appointment
File Edit View Insert Format Tools Actions Help
Type a question for help
Save and Close
Recurrence...
Invite Attendees...
Appointment
Scheduling
Contacts...
Categories...

Subject: Outlook XP - Calendar

Location: IS Training Room 701A ☐ This is an online meeting using: Microsoft NetMeeting

Start time: Thu 12/15/2005 08:30 ☐ All day event

End time: Thu 12/15/2005 16:00

☑ Reminder: 1 day Show time as: Busy Label: None

- None
- Important
- Meetings
- Personal
- Vacation
- Must Attend
- Travel Required
- Needs Preparation
- Birthday
- Anniversary
- Phone Call

Private ☐

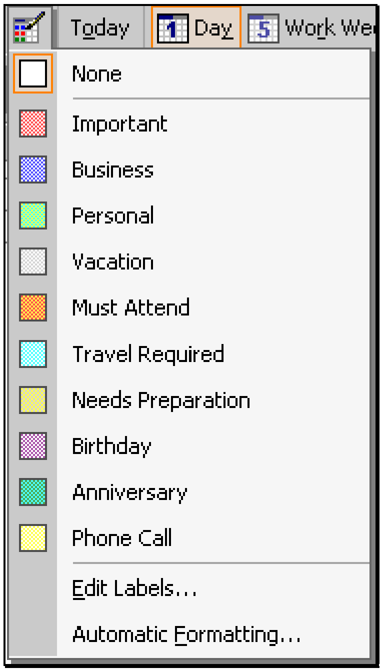
2. Select the **Label** drop-down list and choose a label name and color.

3.
Save and Close
Click the **Save and Close** button on the toolbar. Outlook displays the calendar item with the selected background color.

Procedure: (To assign color via the Calendar Coloring toolbar button)

1. **Select** the calendar item in the calendar.

2. Click the **Calendar Coloring** button on the **Calendar** toolbar. The **Calendar Coloring** menu displays:

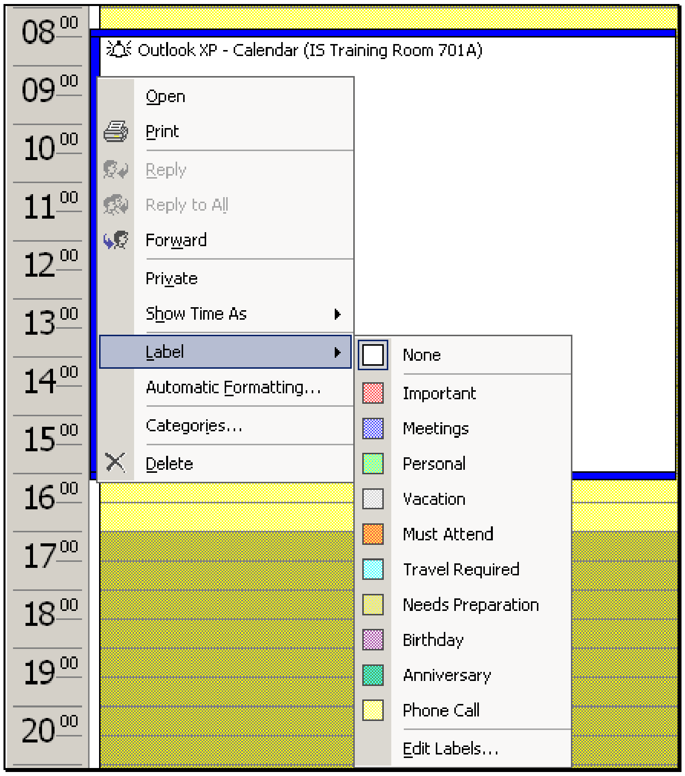

Today
1 Day
5 Work We
None
Important
Business
Personal
Vacation
Must Attend
Travel Required
Needs Preparation
Birthday
Anniversary
Phone Call
Edit Labels...
Automatic Formatting...

3. Choose the desired label and color. Outlook changes the background of the calendar item to the selected color.

Chapter 5 – Using Calendar Coloring

Procedure: (To assign color via the pop-up menu)

1. Select the calendar item by *right*-clicking its left border. A pop-up menu displays:


08 00
09 00
10 00
11 00
12 00
13 00
14 00
15 00
16 00
17 00
18 00
19 00
20 00
Outlook XP - Calendar (IS Training Room 701A)
Open
Print
Reply
Reply to All
Forward
Private
Show Time As
Label
Automatic Formatting...
Categories...
Delete
None
Important
Meetings
Personal
Vacation
Must Attend
Travel Required
Needs Preparation
Birthday
Anniversary
Phone Call
Edit Labels...

2. Select the **Label** menu. The color choices display.

3. Select a label and color. Outlook changes the background of the calendar item to the selected color.

Tips:

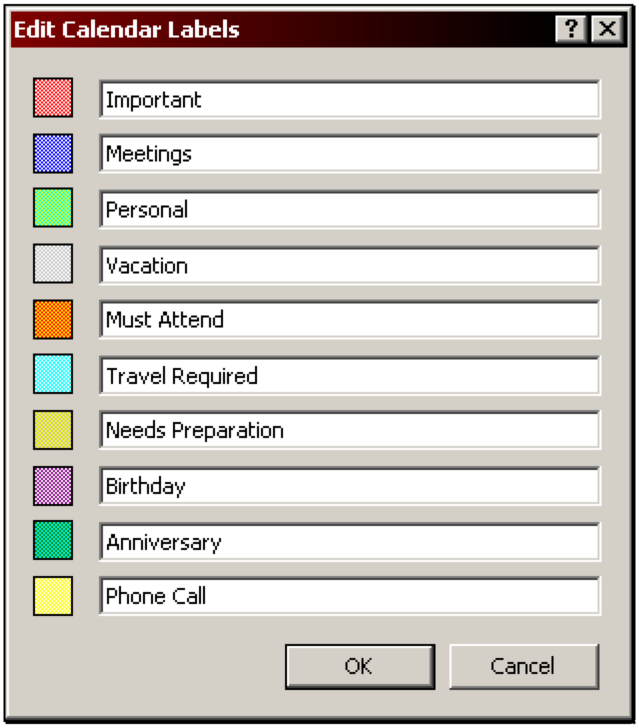
- The color choices on the Calendar Coloring menu will be dimmed if no calendar item is selected.
- Color can be removed by choosing **None** from the menu.
- Meeting organizers can assign color to a meeting, however, it will not be received by the meeting attendees.

Editing the Calendar Coloring Labels

While the number and choice of colors is limited, Outlook does allow customization of the text of the individual color labels.

Procedure:

1. Click the **Calendar Coloring** button on the **Calendar** toolbar. The **Calendar Coloring** drop-down menu displays.
2. Choose **Edit Labels**. The **Edit Calendar Labels** dialog box displays:



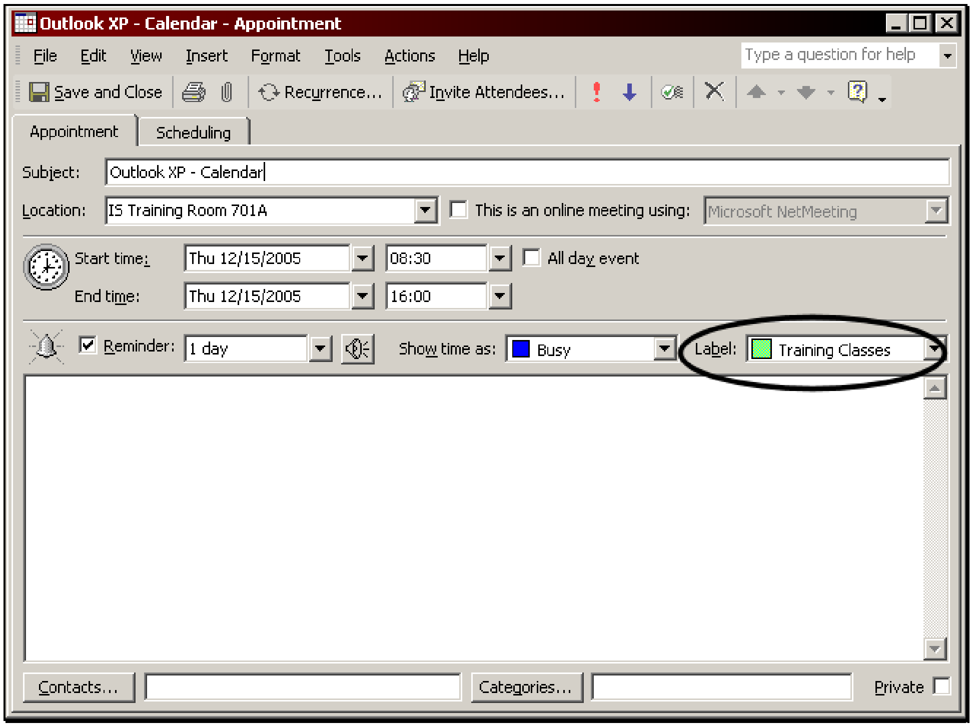
🟥 Important
🟦 Meetings
🟩 Personal
⬜ Vacation
🟧 Must Attend
🟦 Travel Required
🟨 Needs Preparation
🟪 Birthday
🟩 Anniversary
🟨 Phone Call

3. Choose a label to modify by clicking in the field. Delete the displayed text and type the new label.
4. Repeat step 3 for all labels to be modified.
5. Click **OK** when completed.

Warnings:

- When using the **Edit Labels** feature to change the text for a label, be sure to keep a list of the original label text and the new text. Outlook does not have a “restore” or “reset” feature to return the list to its default. The original or default list can be found at the beginning of this chapter.
- When grouping or filtering based on the **Label** field in a table-based calendar view, Outlook will ignore the customized label text and continue to present the original default label text. However, the placement of the label in the list remains the same.

For example, in the appointment below, the label displays the customized text of **Training Classes**:


Outlook XP - Calendar - Appointment
File
Edit
View
Insert
Format
Tools
Actions
Help
Type a question for help
Save and Close
Recurrence...
Invite Attendees...
Appointment
Scheduling

Subject: Outlook XP - Calendar

Location: IS Training Room 701A

☐ This is an online meeting using: Microsoft NetMeeting

Start time: Thu 12/15/2005 08:30 ☐ All day event

End time: Thu 12/15/2005 16:00

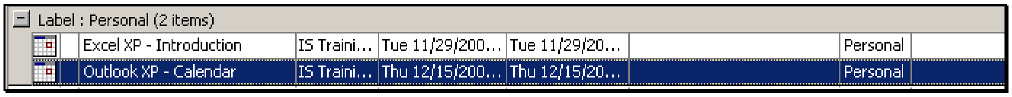
☑ Reminder: 1 day

Show time as: Busy

Label: 🟩 Training Classes

Contacts...
Categories...
Private ☐

However, if the calendar is in a table view, the group and column display the original label of **Personal**:



Label : Personal (2 items)

Excel XP - Introduction	IS Traini...	Tue 11/29/200...	Tue 11/29/20...		Personal
Outlook XP - Calendar	IS Traini...	Thu 12/15/200...	Thu 12/15/20...		Personal

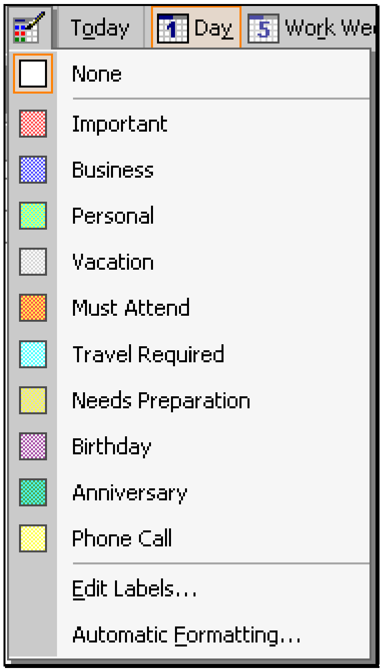
Assigning Color Automatically

Outlook also allows the creation of rules to automatically color appointments that meet established criteria. For example, a specific color could be applied to all meeting requests from a particular person.

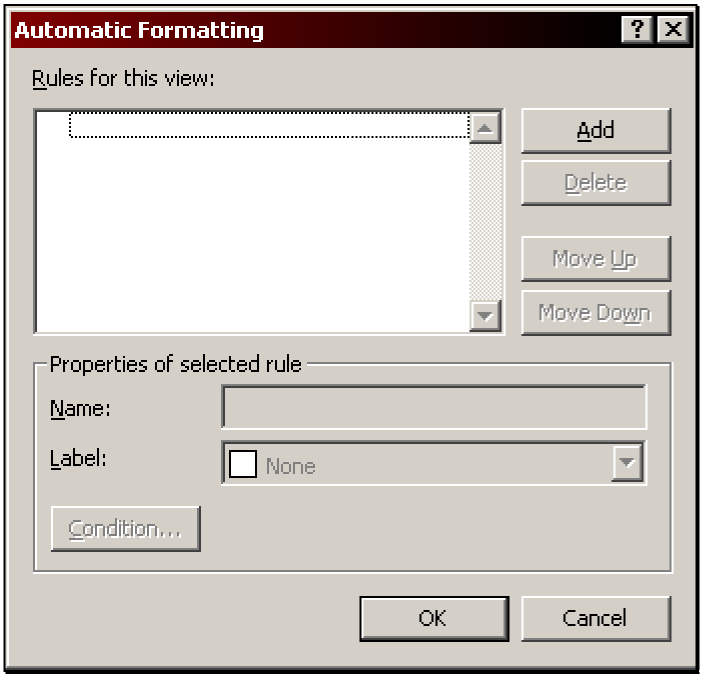
Manual coloring always takes precedence over automatic coloring, so if manual coloring has been applied to an item, automatic coloring will not be applied to it.

Procedure:

1. Click the **Calendar Coloring** button on the **Calendar** toolbar. The **Calendar Coloring** drop-down menu displays:


Today
Day
Work We
None
Important
Business
Personal
Vacation
Must Attend
Travel Required
Needs Preparation
Birthday
Anniversary
Phone Call
Edit Labels...
Automatic Formatting...

2. Choose **Automatic Formatting**. The **Automatic Formatting** dialog box displays:


Automatic Formatting
Rules for this view:
Add
Delete
Move Up
Move Down
Properties of selected rule
Name:
Label:
Condition...
OK
Cancel

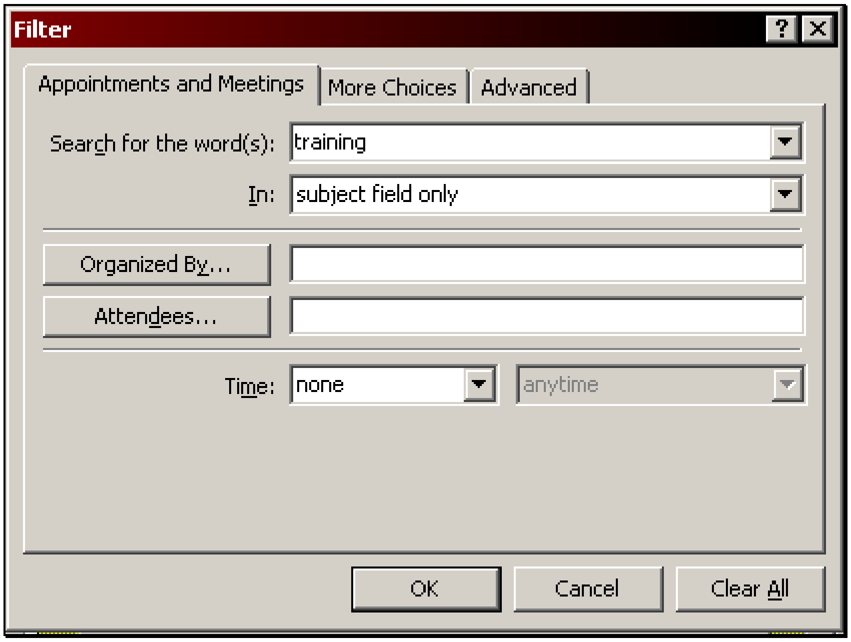
Label: None

3. Click **Add** to add a new rule.

4. The **Name** field will be highlighted with the word **Untitled** in the field. Type a new name for the rule.

5. From the **Label** drop-down list, choose a label color and name.

6. Click **Condition** to create the conditions for when the color rule should be applied. The **Filter** dialog box displays:


Filter
Appointments and Meetings
More Choices
Advanced
Organized By...
Attendees...
OK
Cancel
Clear All

Search for the word(s): training

In: subject field only

Time: none anytime

7. Using the fields and tabs in the **Filter** dialog box, create the condition(s) for the rule.
8. Click **OK** to close the **Filter** dialog box.
9. If desired, click **Add** to create another rule and repeat steps 4 through 8.
10. Click **OK** to close the **Automatic Formatting** dialog box.

Warning:

- Outlook maintains separate **Automatic Formatting** rules for every calendar view. Therefore, when automatic formatting rules are created, they will only be applied in the view in which they were created. For example, if an automatic formatting rule is created in the **Day/Week/Month** view (the default calendar view), that rule will not be present or applied in any other view, such as **Day/Week/Month with AutoPreview**.

Chapter 6

Managing Group Schedules

Chapter Objectives:

- Creating a Group Schedule
- Adding a Distribution List to a Group Schedule
- Viewing a Group Schedule
- Editing or Modifying a Group Schedule
- Setting up a Meeting or Sending E-mail using a Group Schedule
- Deleting a Group Schedule

Chapter 6 – Managing Group Schedules

Overview

Previous chapters explained how to use Outlook to set up appointments and meetings. However, there is an additional tool for planning and scheduling meetings: **Group Schedules**. Because all user calendar information is stored in a single database, users have easy access to the calendars for all members of the organization.

For example, managers can get an overview of what their teams are doing by viewing the team members' joint schedules, or an administrative assistant who needs to locate employees can check a group schedule for Outlook calendars.

A group schedule allows anyone to view other calendars without having to go through the process of scheduling a meeting. It should be noted however that the availability information will be generic, unless the other users have granted additional permissions to their calendars.

This chapter will show how to create and manage group schedules, as well as how to use group schedules to perform such tasks as e-mailing a group of users and scheduling meetings.

Creating a Group Schedule

Group schedules can be thought of as "distribution lists" for calendars. Distribution lists consist of e-mail addresses under a single title or name, while group schedules consist of multiple calendars under a single title or name.

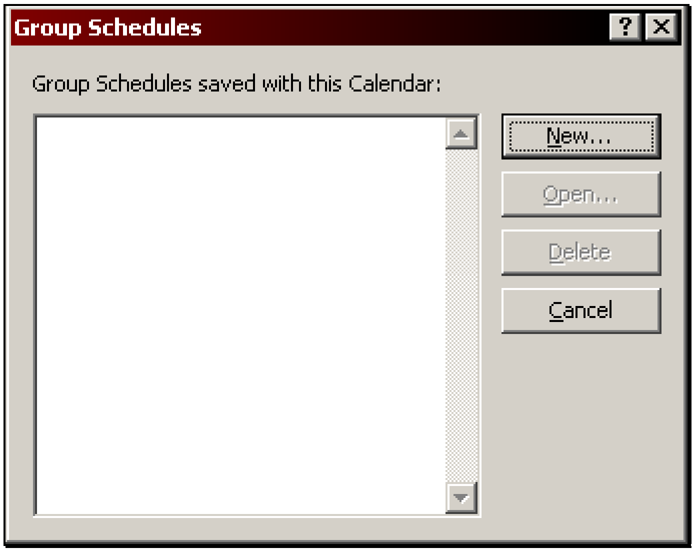
Creating a group schedule is very similar to the process of scheduling a meeting. The group schedule window is almost exactly the same as the Meeting Planner window. See **Chapter 4 – Working with Meetings** for a complete description of the Meeting Planner window.

Procedure:

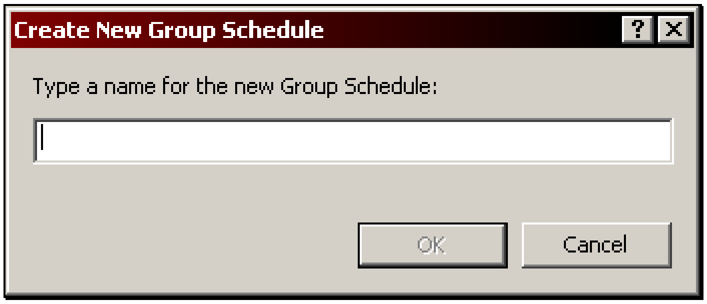
1. Select the **Actions** menu and choose **View Group Schedules**.

OR

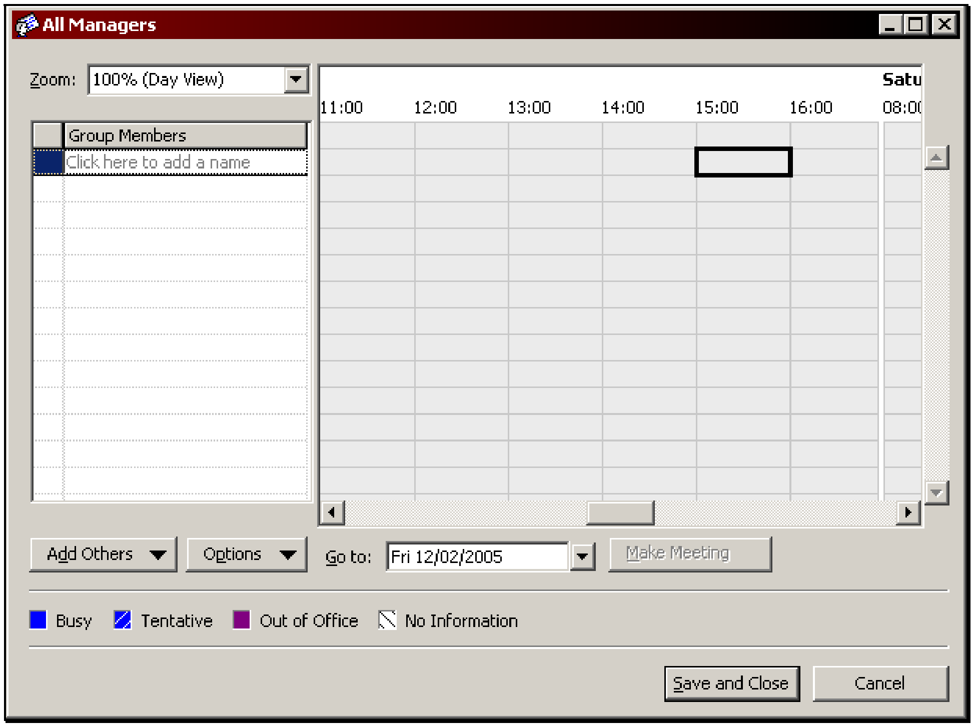
Click the **Schedules** button on the **Calendar** toolbar. The **Group Schedules** dialog box displays:


Group Schedules
?
Group Schedules saved with this Calendar:
New...
Open...
Delete
Cancel

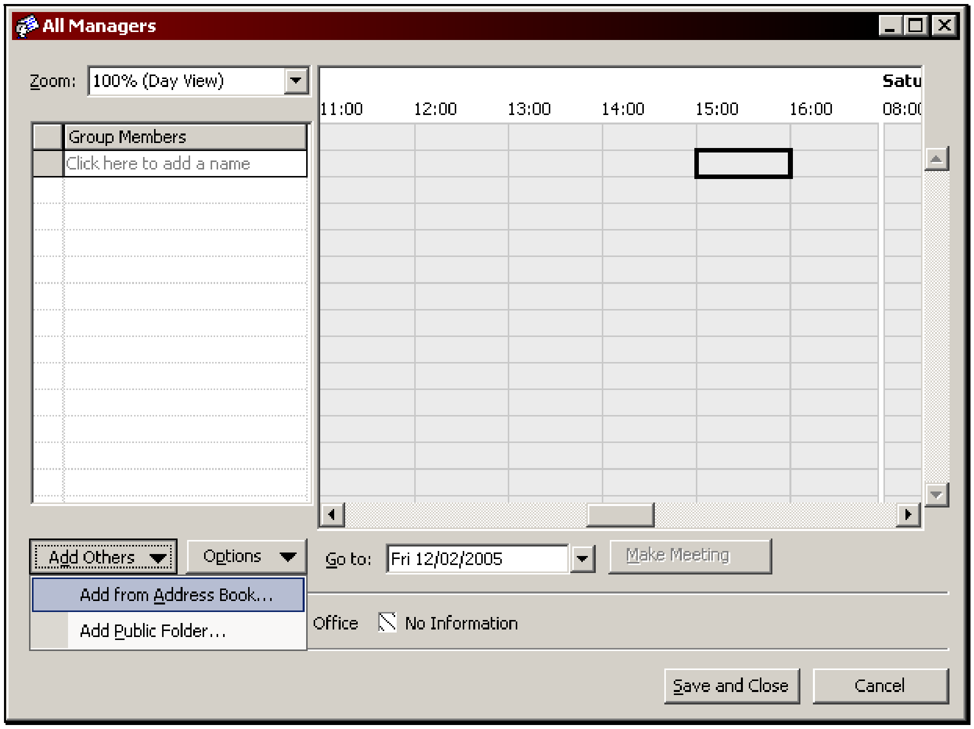
2. Click **New**. The **Create New Group Schedule** dialog box displays:


Create New Group Schedule
?
Type a name for the new Group Schedule:
OK
Cancel

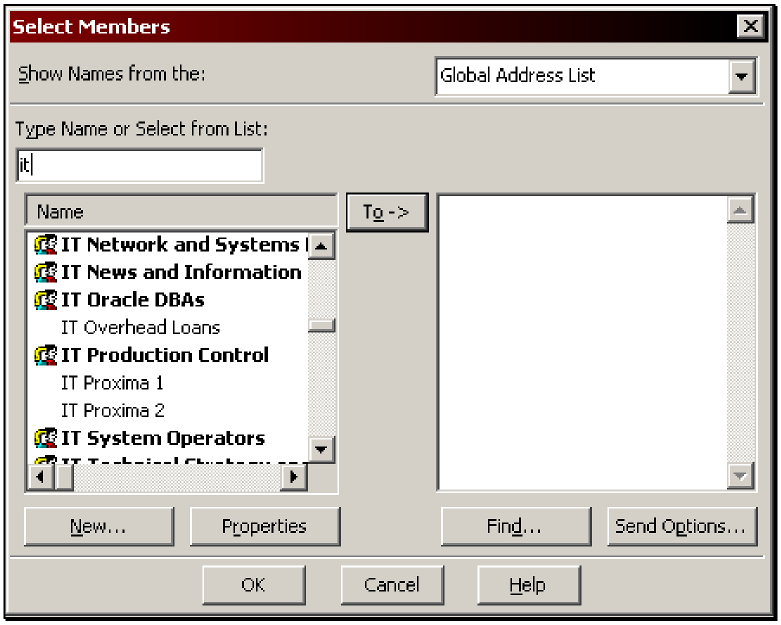
3. Type a descriptive name for the group schedule and click **OK**. The group schedule window displays:


All Managers
Zoom: 100% (Day View)
Satu
11:00
12:00
13:00
14:00
15:00
16:00
08:00
Group Members
Click here to add a name
Add Others
Options
Go to: Fri 12/02/2005
Make Meeting
Busy
Tentative
Out of Office
No Information
Save and Close
Cancel

4. To add names from the Global Address List to the schedule, click **Add Others** and choose **Add from Address Book**.


All Managers
Zoom: 100% (Day View)
Satu
11:00
12:00
13:00
14:00
15:00
16:00
08:00
Group Members
Click here to add a name
Add Others
Options
Go to: Fri 12/02/2005
Make Meeting
Add from Address Book...
Add Public Folder...
Office
No Information
Save and Close
Cancel

The **Select Members** dialog box displays:

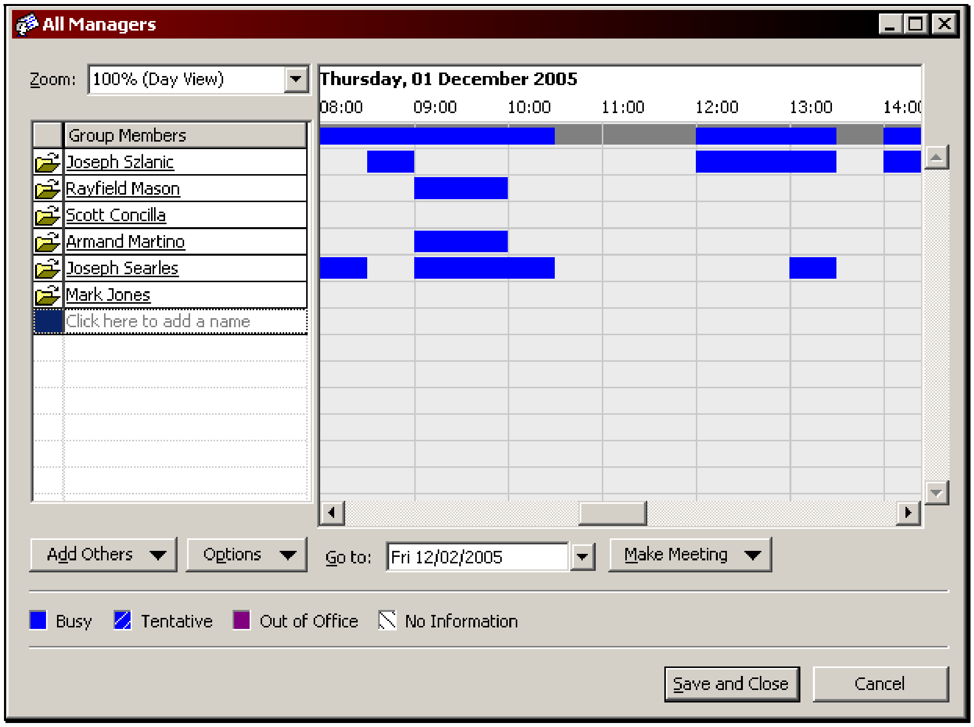

Select Members
Name
To ->
New…
Properties
Find…
Send Options…
OK
Cancel
Help

Show Names from the: Global Address List

Type Name or Select from List: it

IT Network and Systems I
IT News and Information
IT Oracle DBAs
IT Overhead Loans
IT Production Control
IT Proxima 1
IT Proxima 2
IT System Operators

5. Choose members by scrolling, highlighting the name(s), and clicking **To**. Click **OK** when all members have been selected. Outlook displays the group schedule window with the selected members and their availability information:


All Managers
08:00
09:00
10:00
11:00
12:00
13:00
14:00
Group Members
Click here to add a name
Add Others
Options
Make Meeting
Busy
Tentative
Out of Office
No Information
Save and Close
Cancel

Zoom: 100% (Day View)

Thursday, 01 December 2005

Joseph Szlanic
Rayfield Mason
Scott Concilla
Armand Martino
Joseph Searles
Mark Jones

Go to: Fri 12/02/2005

6. Click **Save and Close** to save the member list and close the group schedule.

Adding a Distribution List to a Group Schedule

Outlook distribution lists can also be added to group schedules. This can be used as a shortcut for adding an already existing list of people to a group schedule, or as a convenient way to display multiple schedules on one line.

Procedure:

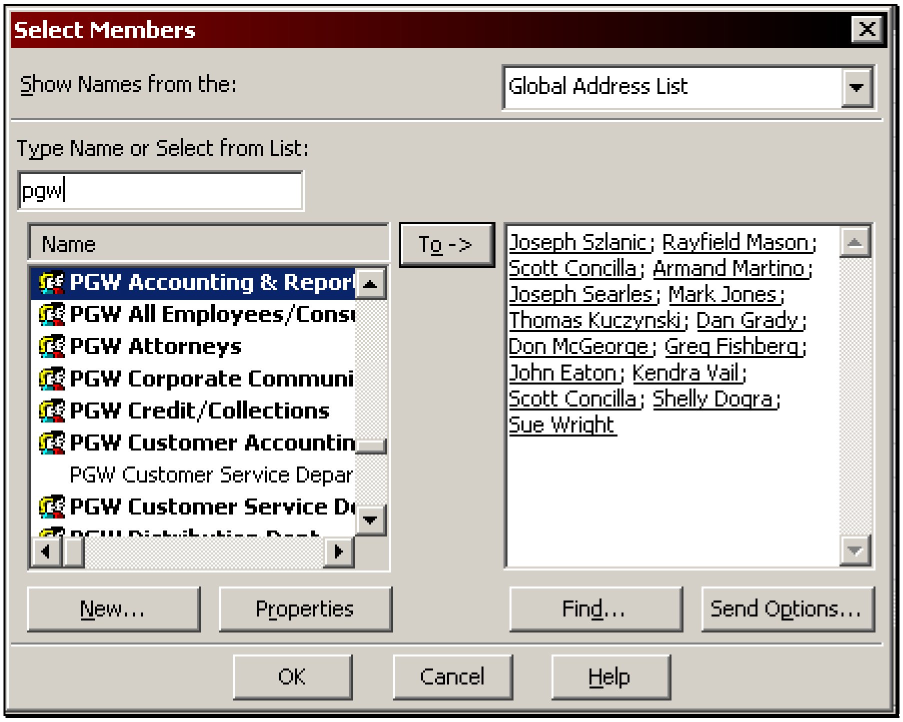
1. Select the **Actions** menu and choose **View Group Schedules**.

OR

Click the **Schedules** button on the **Calendar** toolbar. The **Group Schedules** dialog box displays.

2. Select a schedule and click **Open**. The selected group schedule window displays.

3. Click **Add Others** and choose **Add from Address Book**. The **Select Members** dialog box displays:



Show Names from the: Global Address List

Type Name or Select from List: pgw

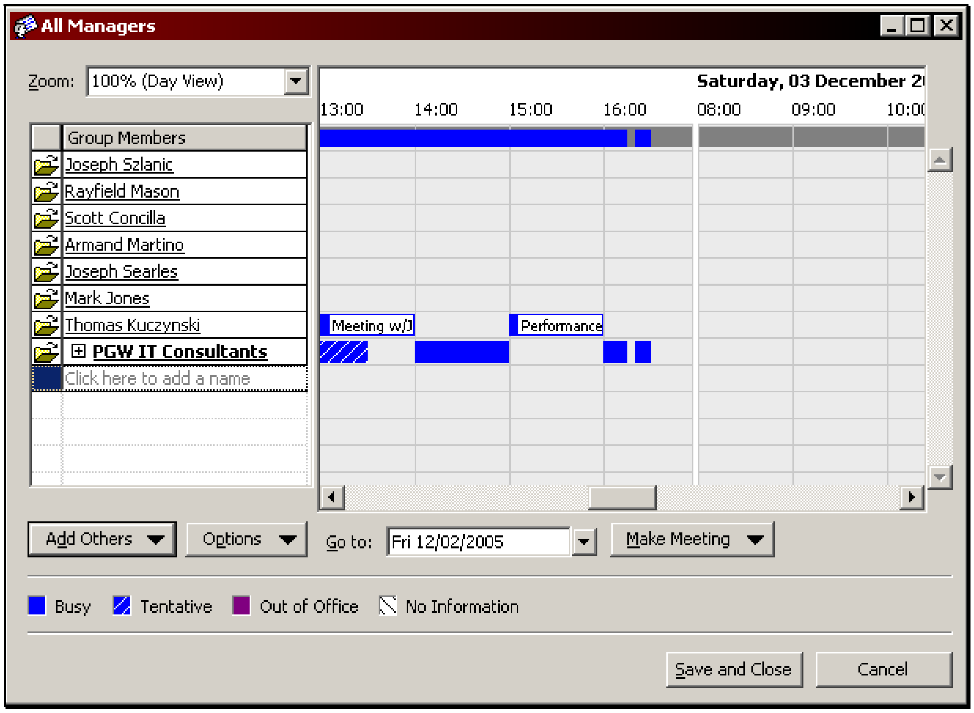
PGW Accounting & Repor
PGW All Employees/Consu
PGW Attorneys
PGW Corporate Communi
PGW Credit/Collections
PGW Customer Accountin
PGW Customer Service Depar
PGW Customer Service D

Joseph Szlanic; Rayfield Mason; Scott Concilla; Armand Martino; Joseph Searles; Mark Jones; Thomas Kuczynski; Dan Grady; Don McGeorge; Greg Fishberg; John Eaton; Kendra Vail; Scott Concilla; Shelly Dogra; Sue Wright

4. Select the distribution list name and click **To**.

5. Click **OK** to return to the group schedule.

6. The list name will appear in the **Group Member** list with a plus sign **[+]** next to the name of the list.

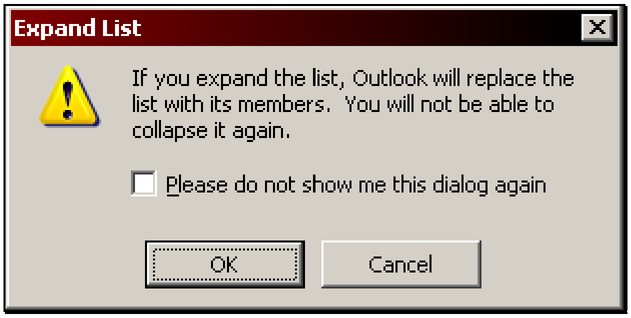

All Managers
Saturday, 03 December 2
13:00
14:00
15:00
16:00
08:00
09:00
10:0
Meeting w/J
Performance
Add Others
Options
Make Meeting
Busy
Tentative
Out of Office
No Information
Save and Close
Cancel

Zoom: 100% (Day View)

Group Members
Joseph Szlanic
Rayfield Mason
Scott Concilla
Armand Martino
Joseph Searles
Mark Jones
Thomas Kuczynski
⊞ **PGW IT Consultants**
Click here to add a name

Go to: Fri 12/02/2005

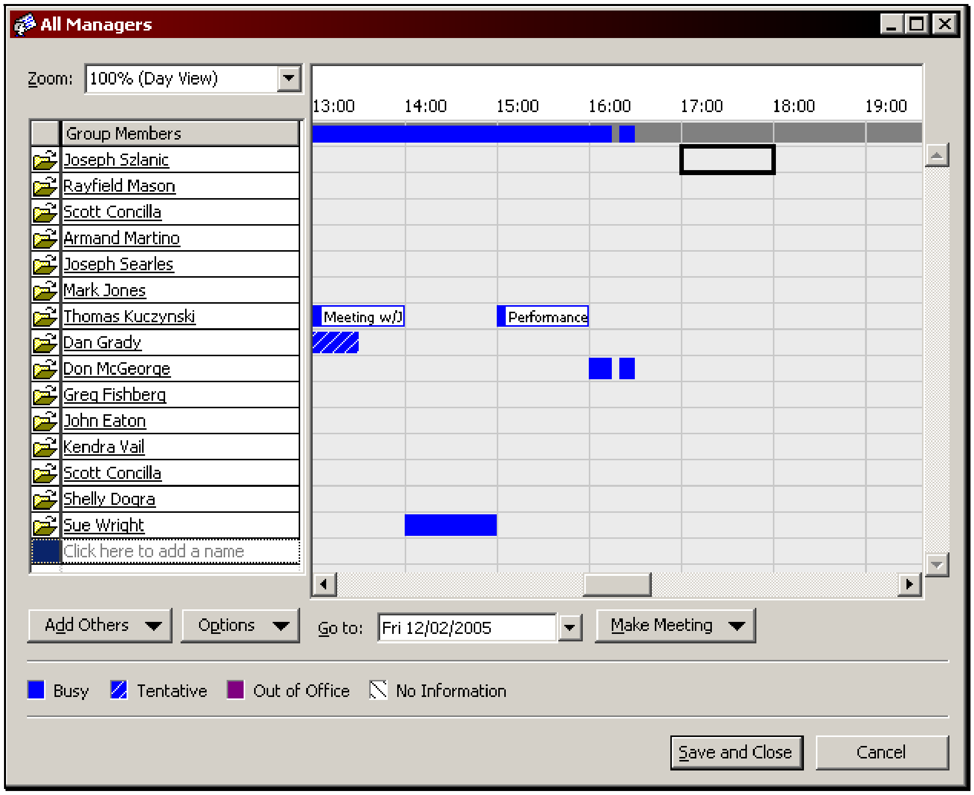
7. If desired, click the plus sign **[+]** to expand the list into its individual member names. The **Expand List** warning displays:


Expand List
OK
Cancel

If you expand the list, Outlook will replace the list with its members. You will not be able to collapse it again.

☐ Please do not show me this dialog again

8. Click **OK** to proceed. Outlook expands the list into the individual member names and displays their calendars:


All Managers
13:00
14:00
15:00
16:00
17:00
18:00
19:00
Meeting w/J
Performance
Add Others
Options
Make Meeting
Busy
Tentative
Out of Office
No Information
Save and Close
Cancel

Zoom: 100% (Day View)

Group Members
Joseph Szlanic
Rayfield Mason
Scott Concilla
Armand Martino
Joseph Searles
Mark Jones
Thomas Kuczynski
Dan Grady
Don McGeorge
Greg Fishberg
John Eaton
Kendra Vail
Scott Concilla
Shelly Dogra
Sue Wright
Click here to add a name

Go to: Fri 12/02/2005

9. Click **Save and Close** to save changes and close the group schedule window.

Tip:

- To not be warned in the future when expanding a list, select the **Please do not show me this dialog again** check box.

Chapter 6 – Managing Group Schedules

Viewing a Group Schedule

A group schedule can be viewed at any time. For example, viewing a group schedule can be used to help get an idea of when to plan a meeting, or it could be used to see which team members are currently in the office.

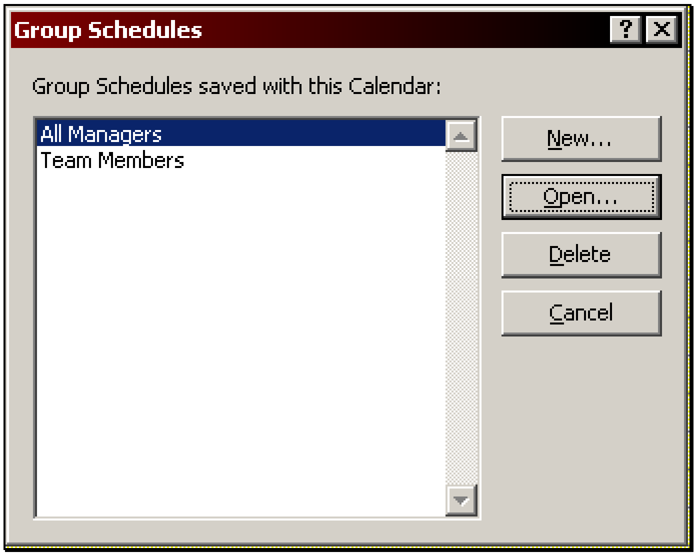
The group schedule window is nearly identical to the **Plan a Meeting** window or the **Scheduling** tab in a meeting invitation. See the topic **Understanding the Meeting Planner Window** in **Chapter 4 – Working with Meetings** for a complete description of the window features and options.

Procedure:

1. Select the **Actions** menu and choose **View Group Schedules**.

OR

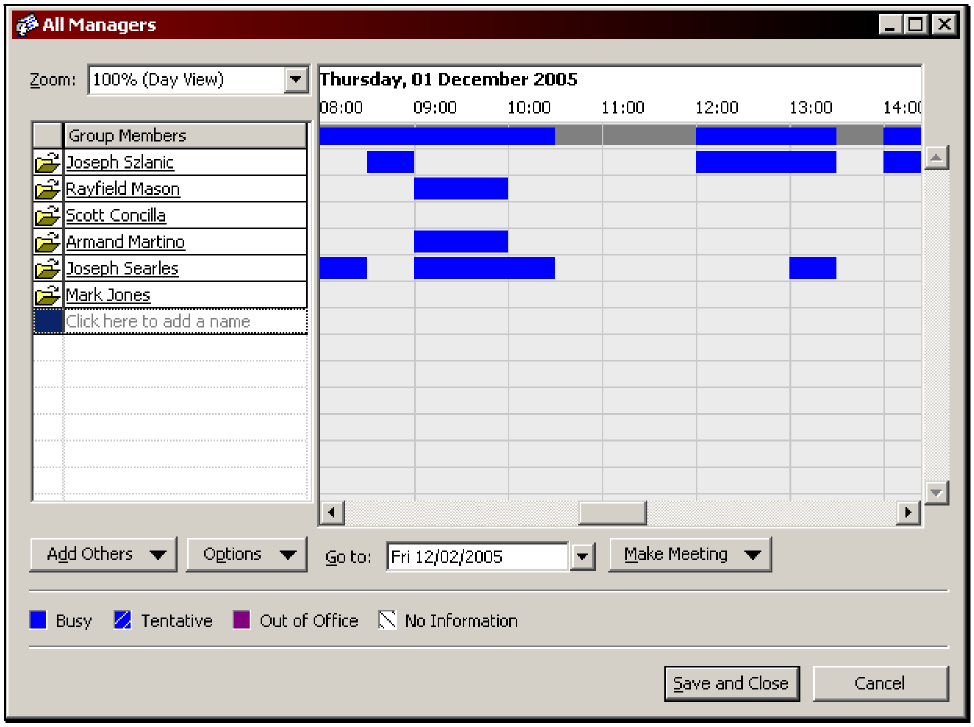
Click the **Schedules** button on the **Calendar** toolbar. The **Group Schedules** dialog box displays:



Group Schedules saved with this Calendar:

All Managers
Team Members

2. Choose a group schedule and click **Open**. The selected group schedule displays:


All Managers

Zoom: 100% (Day View)

Thursday, 01 December 2005

Group Members
Joseph Szlanic
Rayfield Mason
Scott Concilla
Armand Martino
Joseph Searles
Mark Jones
Click here to add a name

Go to: Fri 12/02/2005

08:00
09:00
10:00
11:00
12:00
13:00
14:0
Add Others
Options
Make Meeting
Busy
Tentative
Out of Office
No Information
Save and Close
Cancel

3. Click **Save and Close** when finished viewing the calendar.

Tips:

- Instead of using the scroll bars, use the **Go to** drop-down box to choose a different date.
- The amount of detail shown for each member's calendar will depend upon the permissions that the member has granted for specific individuals or groups. If the member has not granted any permission, no calendar details will be available, regardless of the setting of the **Show Calendar Details** option.
- If adequate permission has been granted, any member's calendar can be viewed in a separate window by clicking the **Open Folder** icon in the left-hand column next to the member's name.
- There are no Start and End bars or AutoPick in a group schedule.

Editing or Modifying a Group Schedule

A group schedule can be edited or modified at any time. For instance, a user may wish to add or remove a people from the group schedule.

Procedure: (To add members to the group schedule)

1. **Open** the group schedule to be modified.
2. In the group schedule window, click **Add Others** and choose **Add from Address Book**. The **Select Members** dialog box displays.
3. Choose additional members by scrolling, highlighting the name(s), and clicking **To**.
4. Click **OK** when all members have been selected.
5. Outlook displays the group schedule window with the added members and their availability information.
6. Click **Save and Close** to save the changes and close the **Group Schedule** window.

Procedure: (To remove members from a group schedule)

1. **Open** the group schedule to be modified.
2. Click the member name to activate the listing, then click the member name again to highlight it and then press the **[Delete]** key.

   OR

   Right-click the member name and select **Clear**.
3. The member’s name is removed from the list. Repeat step 2 for additional names.
4. Click **Save and Close** to save the changes and close the **Group Schedule** window.

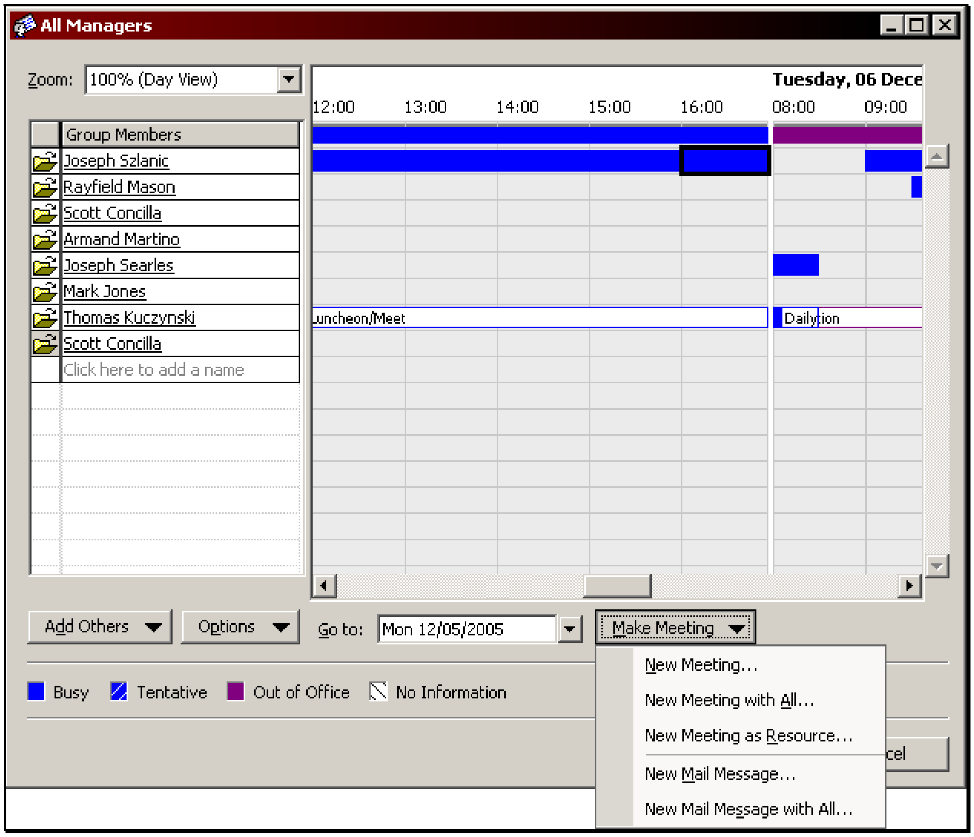
Setting up a Meeting or Sending E-mail Using a Group Schedule

A group schedule can be used as a starting point for setting up a meeting or sending an e-mail message. When choosing one of these options, Outlook opens a new meeting request window or a message window and the meeting request or the message is created as normal.

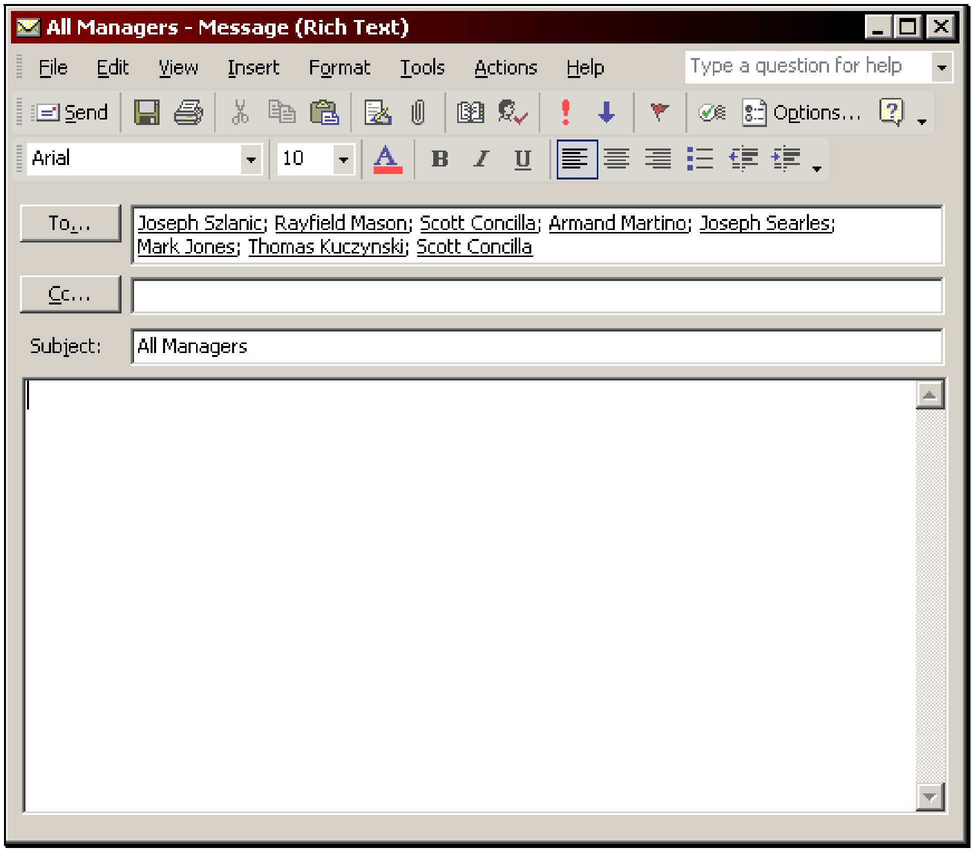
Procedure: (To send an e-mail to a group schedule)

1. **Open** the desired group schedule.

2. Click **Make Meeting**. A drop-down menu displays:


All Managers
Zoom: 100% (Day View)
Tuesday, 06 Dece
12:00
13:00
14:00
15:00
16:00
08:00
09:00
Group Members
Joseph Szlanic
Rayfield Mason
Scott Concilla
Armand Martino
Joseph Searles
Mark Jones
Thomas Kuczynski
Scott Concilla
Click here to add a name
Luncheon/Meet
Daily tion
Add Others
Options
Go to:
Mon 12/05/2005
Make Meeting
New Meeting...
New Meeting with All...
New Meeting as Resource...
New Mail Message...
New Mail Message with All...
Busy
Tentative
Out of Office
No Information
cel

3. Choose **New Mail Message with All**. A **Message** window with the member addresses and the group schedule name as the **Subject** displays:


All Managers - Message (Rich Text)
File
Edit
View
Insert
Format
Tools
Actions
Help
Type a question for help
Send
Options...
Arial
10
B
I
U
To...
Cc...
Subject:

To: Joseph Szlanic; Rayfield Mason; Scott Concilla; Armand Martino; Joseph Searles; Mark Jones; Thomas Kuczynski; Scott Concilla

Subject: All Managers

4. Change the subject if desired and compose the message.

5. Send Click the **Send** button on the **Message** toolbar to send the message.

6. Click **Save and Close** to close the group schedule window.

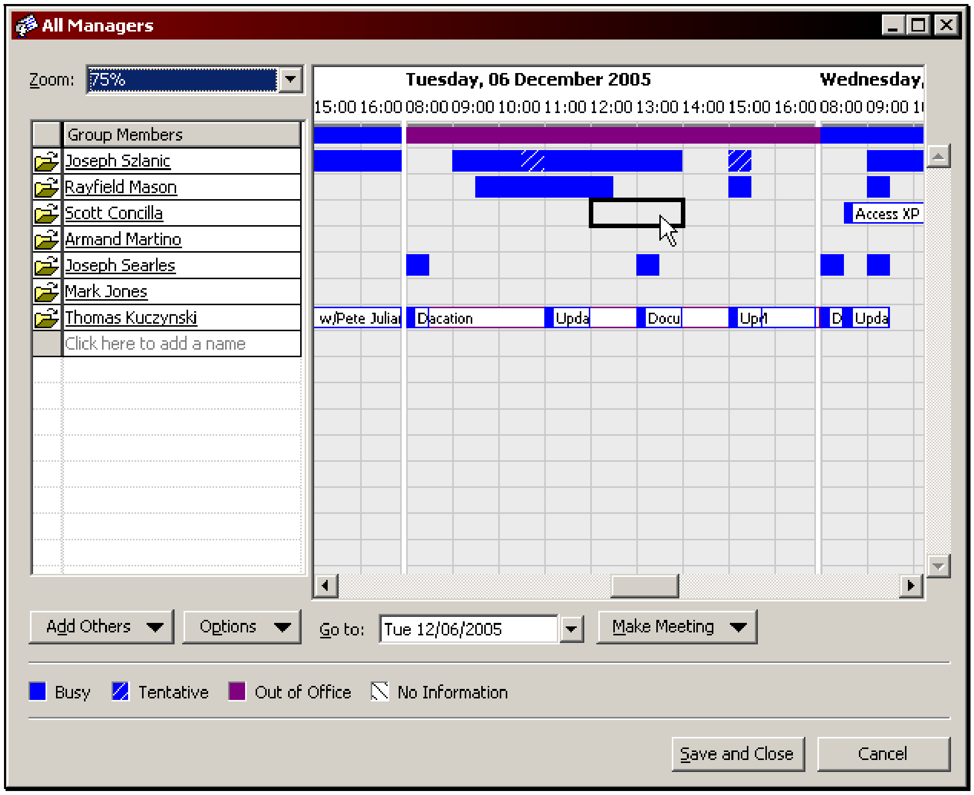
Tip:

- To send a message to a single member of the list, first select any time block of the member's calendar, then click the **Make Meeting** drop-down menu, and choose **New Mail Message**.

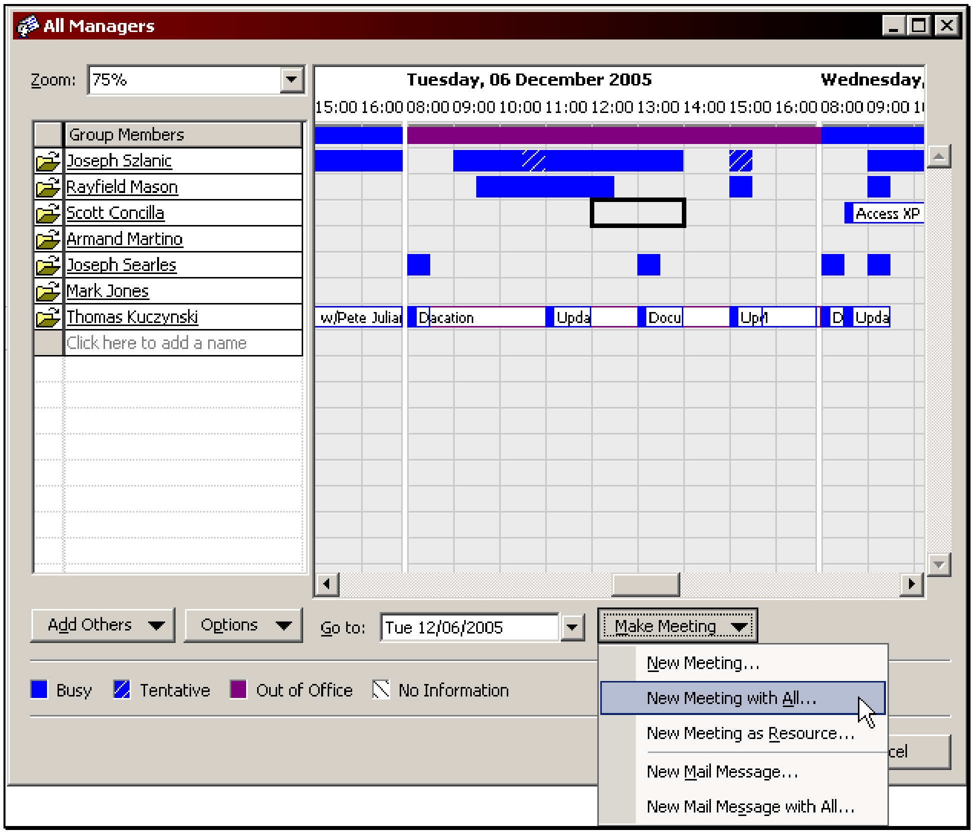
Procedure: (To create a meeting with the members of a group schedule)

1. **Open** the desired group schedule.

2. Using the mouse, drag over the desired meeting date and time in the planner on one member's calendar (it does not matter whose calendar is selected). Outlook will highlight the time block with a solid black border.


All Managers
Zoom:
75%
Tuesday, 06 December 2005
Wednesday,
15:00 16:00 08:00 09:00 10:00 11:00 12:00 13:00 14:00 15:00 16:00 08:00 09:00
Group Members
Joseph Szlanic
Rayfield Mason
Scott Concilla
Armand Martino
Joseph Searles
Mark Jones
Thomas Kuczynski
Click here to add a name
Access XP
w/Pete Julia
Vacation
Upda
Docu
Upd
D
Upda
Add Others
Options
Go to:
Tue 12/06/2005
Make Meeting
Busy
Tentative
Out of Office
No Information
Save and Close
Cancel

3. Click **Make Meeting**. A drop-down menu displays:

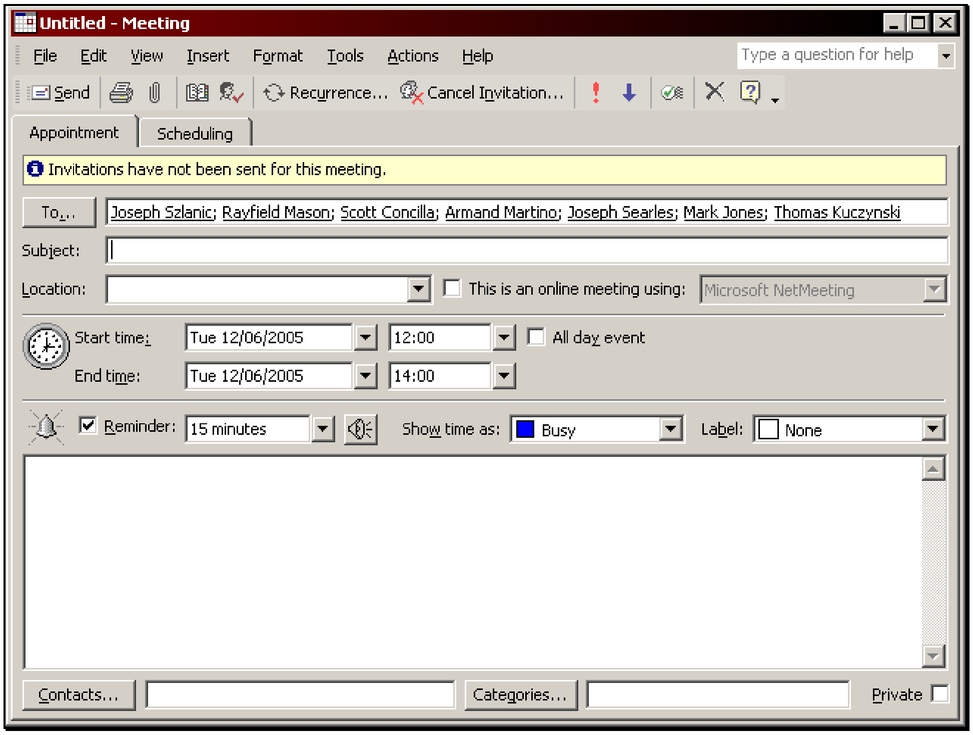

All Managers
Zoom:
Tuesday, 06 December 2005
Wednesday,
15:00 16:00 08:00 09:00 10:00 11:00 12:00 13:00 14:00 15:00 16:00 08:00 09:00
Access XP
w/Pete Julia
Dacation
Upda
Docu
Up
D
Upda
Add Others
Options
Make Meeting
New Meeting…
New Meeting with All…
New Meeting as Resource…
New Mail Message…
New Mail Message with All…
cel
Busy
Tentative
Out of Office
No Information

Zoom: 75%

Group Members
Joseph Szlanic
Rayfield Mason
Scott Concilla
Armand Martino
Joseph Searles
Mark Jones
Thomas Kuczynski
Click here to add a name

Go to: Tue 12/06/2005

4. Choose **New Meeting with All**. A **Meeting** window with the group members in the **To** field displays:


Untitled - Meeting
File Edit View Insert Format Tools Actions Help
Type a question for help
Send
Recurrence…
Cancel Invitation…
Appointment
Scheduling
Contacts…
Categories…
Private

Invitations have not been sent for this meeting.

To… Joseph Szlanic; Rayfield Mason; Scott Concilla; Armand Martino; Joseph Searles; Mark Jones; Thomas Kuczynski

Subject:

Location:

☐ This is an online meeting using: Microsoft NetMeeting

Start time: Tue 12/06/2005 12:00 ☐ All day event

End time: Tue 12/06/2005 14:00

☑ Reminder: 15 minutes Show time as: Busy Label: None

5. Fill out the rest of the meeting fields as desired (See the table in **Chapter 4 – Working with Meetings** for a complete description of these fields).

6. Click **Send** to send the meeting invitation.

7. Click **Save and Close** to close the group schedule window.

Tips:

- To create a meeting with a single member of the list, select the desired date and time block in that member’s calendar, click the **Make Meeting** drop-down menu, and choose **New Meeting**.

- To cancel the creation of a meeting, **Close** the meeting invitation window without saving changes.

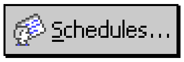
Deleting a Group Schedule

If it is no longer needed, a group schedule can be deleted from Outlook.

Procedure:

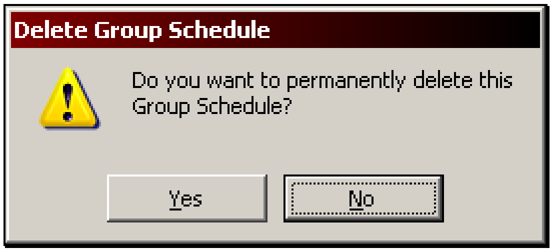
1. Select the **Actions** menu and choose **View Group Schedules**.

OR



Click the **Schedules** button on the **Calendar** toolbar.

2. Select a group schedule and click **Delete**. The **Delete Group Schedule** dialog box displays:



Do you want to permanently delete this Group Schedule?

3. Click **Yes** to permanently delete the group schedule. Click **No** to cancel and return to the group schedule list.

Warning:

- Once deleted, a group schedule **cannot** be recovered with the **Undo** command, nor will it be present in the **Deleted Items** folder.

Chapter 7

Sharing Calendars

Chapter Objectives:

- Viewing Another User’s Calendar
- Designating a Delegate
- Granting Access Permission to a Calendar
- Marking a Calendar Item as Private
- Forwarding Calendar Items to Local Users
- Forwarding Calendar Items to Outside Users
- Publishing a Calendar as a Web Page

Overview

Outlook has many powerful features for sharing calendars and calendar items between users in a network environment. This access is granted not by system administrators, but by the calendar author and users themselves. This allows users to individually customize the access to their calendar without having to involve a system administrator.

Users can be designated as delegates, which will give them access permission to the calendar and send on behalf permissions, or a calendar author can grant simple read permission to a group of users.

Calendar items can also be forwarded as attachments to both local users and, using the iCalendar standard, to users on the Internet.

This chapter will cover how to view the calendars of other Outlook users, create delegates, grant calendar permissions, and how to forward calendar items to both local and outside users.

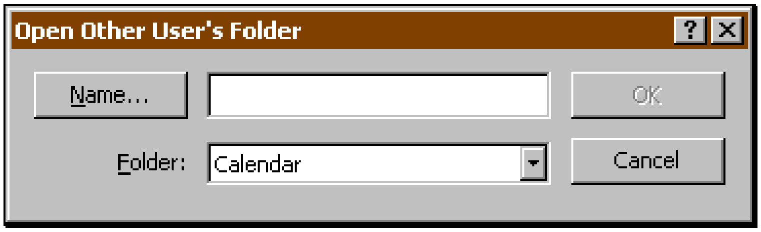
Viewing Another User's Calendar

Outlook offers the ability to view another user's or another resource's calendar and meeting rooms. Unlike a group schedule, this feature opens a full calendar window that can be browsed and navigated.

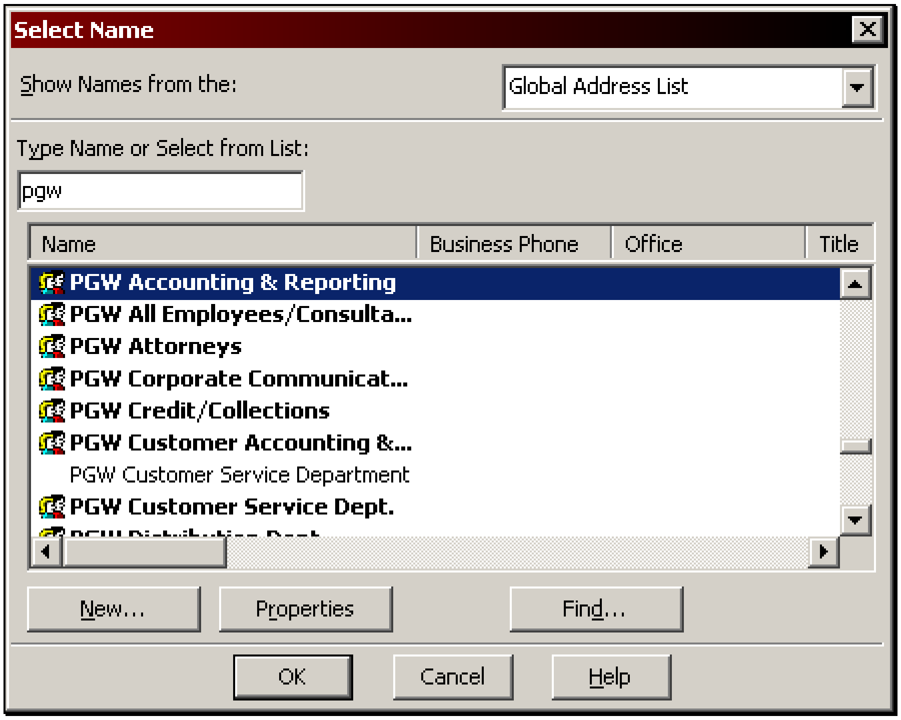
First it is necessary that the calendar is open to the public, or that the user otherwise has access to it, by way of delegates or permissions. Viewing another calendar can help determine available meeting times, as well as check the availability of meeting rooms and equipment.

Procedure:

1. Select the **File** menu, choose **Open**, then **Other User's Folder**. The **Open Other User's Folder** dialog box displays:



2. Click **Name**. The **Select Name** dialog box displays:

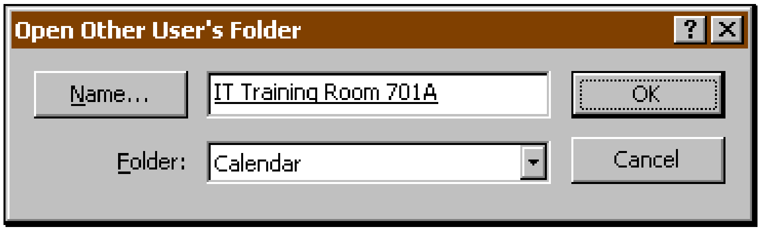

Select Name
Show Names from the:
Type Name or Select from List:
Name
Business Phone
Office
Title
New...
Properties
Find...
OK
Cancel
Help

Global Address List

pgw

PGW Accounting & Reporting
PGW All Employees/Consulta...
PGW Attorneys
PGW Corporate Communicat...
PGW Credit/Collections
PGW Customer Accounting &...
PGW Customer Service Department
PGW Customer Service Dept.

3. Select the name from the **Type Name or Select from List** area and choose **OK**. The **Open Other User's Folder** dialog box displays with the selected name:

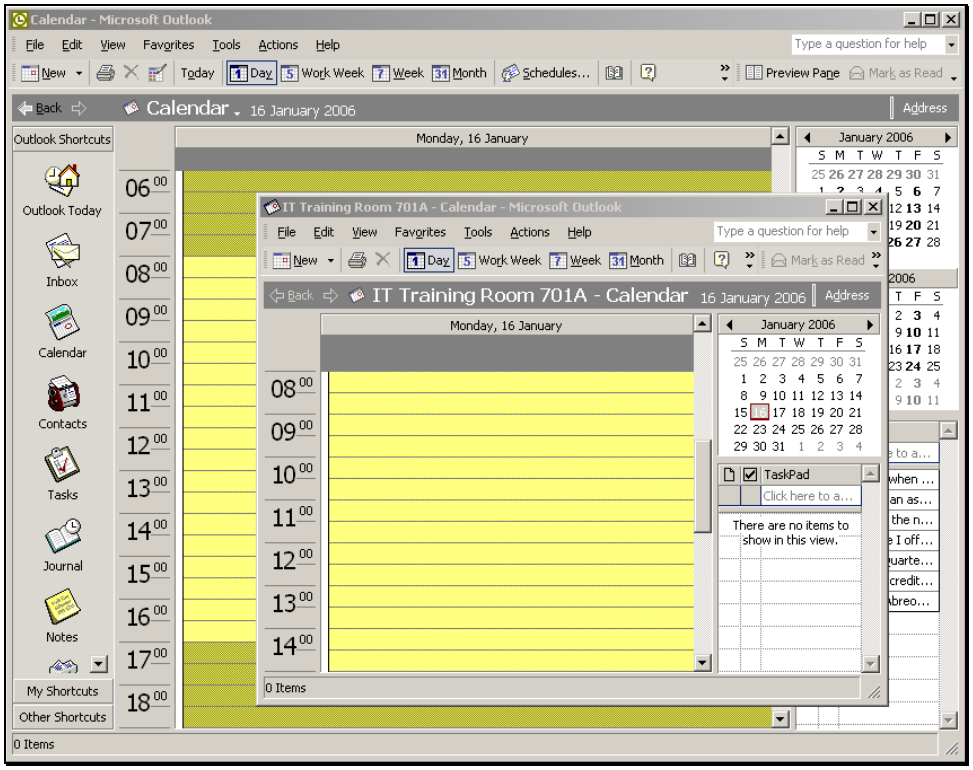

Open Other User's Folder
Name...
OK
Folder:
Cancel

IT Training Room 701A

Calendar

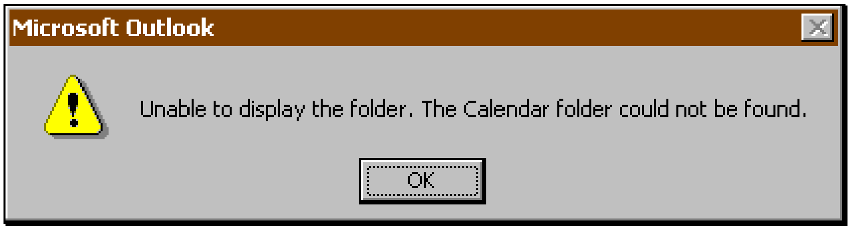
4. Verify that the **Folder** selected is **Calendar**. If it is not, use the drop-down list to select it.

5. Click **OK** when complete. The calendar for the selected user or resource displays as a separate window:


Calendar - Microsoft Outlook
File Edit View Favorites Tools Actions Help
Type a question for help
New Today Day Work Week Week Month Schedules... Preview Pane Mark as Read
Back Calendar 16 January 2006 Address
Outlook Shortcuts
Outlook Today
Inbox
Calendar
Contacts
Tasks
Journal
Notes
My Shortcuts
Other Shortcuts
Monday, 16 January
January 2006
IT Training Room 701A - Calendar - Microsoft Outlook
IT Training Room 701A - Calendar 16 January 2006
TaskPad
Click here to a...
0 Items

There are no items to show in this view.

6. If the user does not have rights to view the calendar, the following dialog box displays:


Microsoft Outlook
OK

Unable to display the folder. The Calendar folder could not be found.

Tip:

- Rights to view a calendar are granted by the calendar owner. Check with that user if access is needed or required.
- Calendars that have been previously opened will appear on the **File**, **Open** submenu. Select a calendar from the list and click to open the calendar without having to complete all the steps in this procedure.

Designating a Delegate

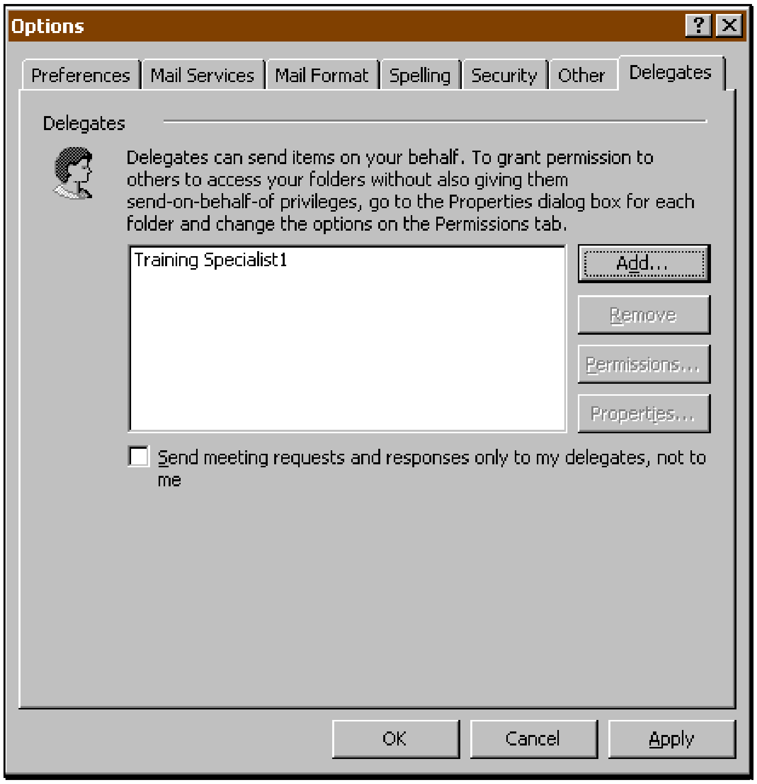
A delegate is another user who has been given complete access to a calendar. For instance, a manager can make their administrative assistant a delegate so that the delegate can administer the calendar on the manager's behalf.

Delegates can also be configured to receive and answer all meeting requests from other users. The delegate will then receive meeting requests and manage the responses.

Procedure:

1. Select the **Tools** menu and choose **Options**.

2. Select the **Delegates** tab.

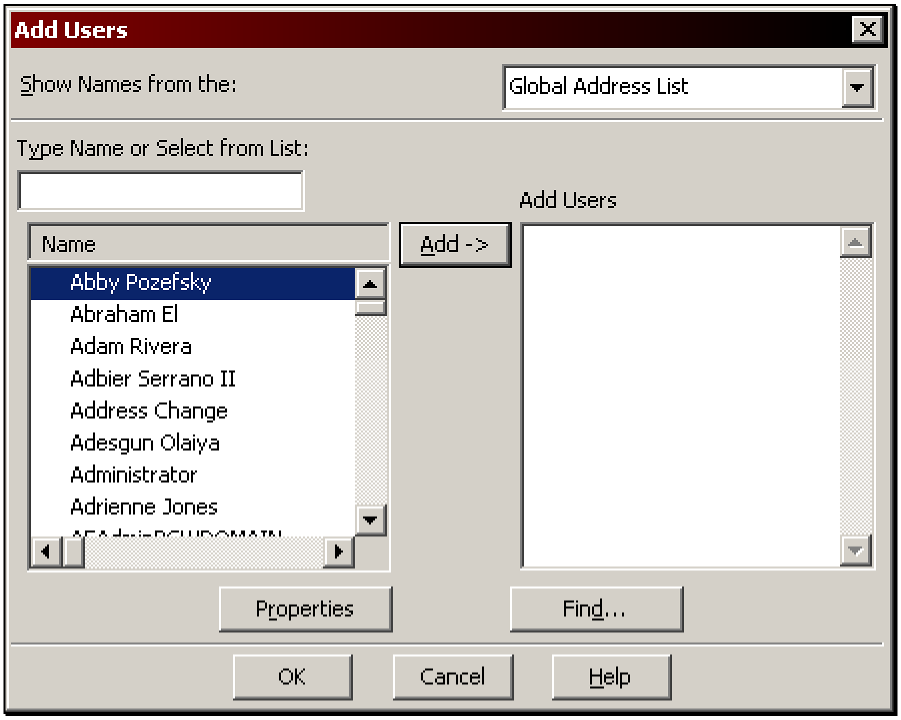

Options
Preferences
Mail Services
Mail Format
Spelling
Security
Other
Delegates
Delegates
Add...
Remove
Permissions...
Properties...
OK
Cancel
Apply

Delegates can send items on your behalf. To grant permission to others to access your folders without also giving them send-on-behalf-of privileges, go to the Properties dialog box for each folder and change the options on the Permissions tab.

Training Specialist1

☐ Send meeting requests and responses only to my delegates, not to me

3. Click **Add**. The **Add Users** dialog box displays:


Add Users
Add Users
Name
Add ->
Properties
Find...
OK
Cancel
Help

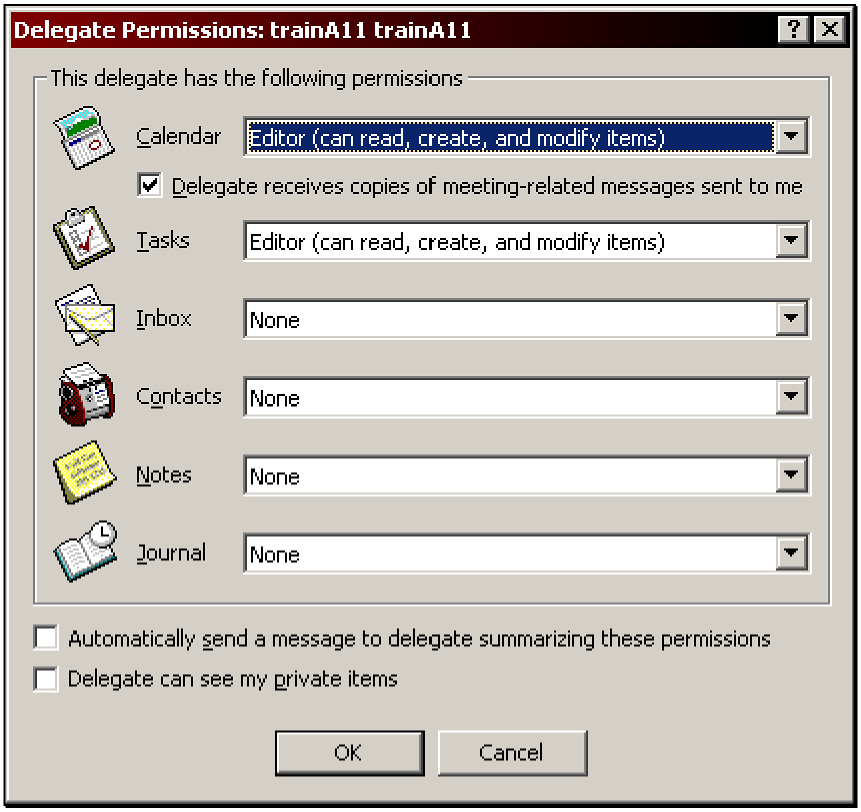
Show Names from the: Global Address List

Type Name or Select from List:

Abby Pozefsky
Abraham El
Adam Rivera
Adbier Serrano II
Address Change
Adesgun Olaiya
Administrator
Adrienne Jones

4. Select a user and click **Add**.

5. Click **OK**. The **Delegate Permissions** dialog box displays:


Delegate Permissions: trainA11 trainA11
OK
Cancel

This delegate has the following permissions

Calendar: Editor (can read, create, and modify items)

☑ Delegate receives copies of meeting-related messages sent to me

Tasks: Editor (can read, create, and modify items)

Inbox: None

Contacts: None

Notes: None

Journal: None

☐ Automatically send a message to delegate summarizing these permissions

☐ Delegate can see my private items

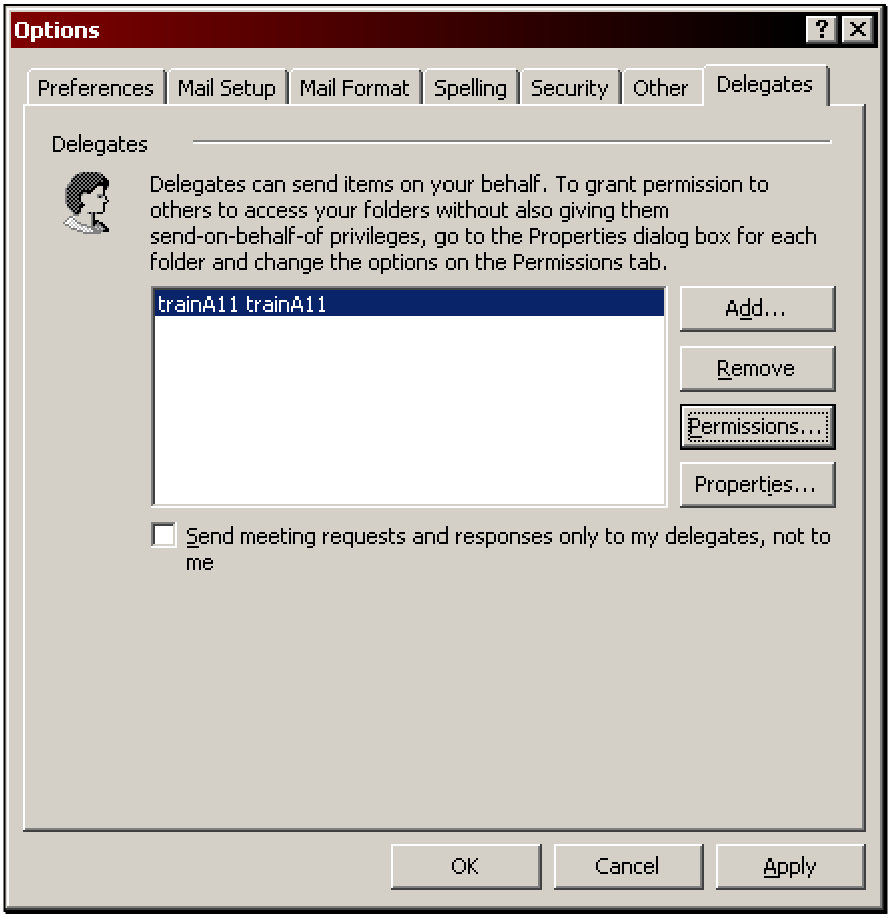
6. In the **Calendar** drop-down list, select one of the following permission levels for the delegate:

Option	Description
None	Delegate does not have any permission to the folder.
Reviewer	Delegate can only read items in the folder.
Author	Delegate can read items and create new items, but cannot modify, change, or delete existing items
Editor	Delegate can read items, create new items, make changes, and delete any items.

7. Select any of the following additional options:

Option	Description
Delegate receives copies of meeting-related messages sent to me	The delegate will receives copies of all meeting invitations, updates, and cancellations. Only available if the permission level is set to **Editor**.
Automatically send a message to delegate summarizing these permissions	Select this check box to have Outlook send an e-mail to the delegate with a summary of the permissions granted.
Delegate can see my private items	The delegate will be able to read and view any items that have been marked as **Private.**

8. Click **OK** when completed. The **Options** window displays:



Options
Preferences
Mail Setup
Mail Format
Spelling
Security
Other
Delegates
Add...
Remove
Permissions...
Properties...
OK
Cancel
Apply

Delegates

Delegates can send items on your behalf. To grant permission to others to access your folders without also giving them send-on-behalf-of privileges, go to the Properties dialog box for each folder and change the options on the Permissions tab.

trainA11 trainA11

☐ Send meeting requests and responses only to my delegates, not to me

9. If the delegate was granted **Editor** permission to the calendar, the **Send meeting requests and responses only to my delegates, not to me** check box will be enabled. Select this check box to have all meeting-related e-mails be sent ONLY to the delegate.

10. Click **OK** when completed.

Tip:

- The recipient of a meeting request created by a delegate sees the message as coming from the calendar's owner, not the delegate. When the recipient opens the message, however, the header indicates that the message was sent by the delegate on behalf of the owner. Responses to the meeting request come back to the delegate and a copy goes to the owner, unless the **Send meeting requests and responses only to my delegates, not to me** option has been enabled.

Chapter 7 – Sharing Calendars

Granting Access Permission to a Calendar

There may be times when designating a delegate is “overkill” – that is, the user being granted permission to the calendar may not need all the extra options that being a delegate affords. Or a calendar owner may not want other users to have too much access to their calendar.

In these cases, a user can grant a certain level of access permission to their calendar, so that others can access the calendar, but not perform any other special functions unless granted by the owner.

Also, if the calendar owner wishes to grant a large number of people access to their calendar, it is better to set access permissions than to create a lengthy list of delegates. For instance, the calendar owner can grant read access to all members of their department.

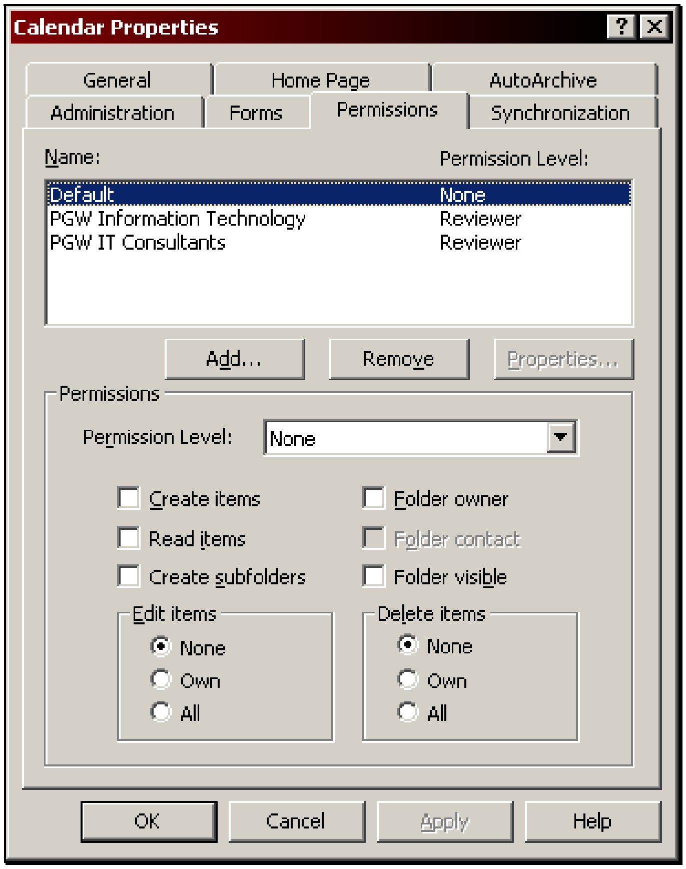
Procedure:

1. From the **File** menu, select **Folder**, then from the submenu select **Properties for “Calendar”**

   OR

   Right-click the calendar folder in the folder list and select **Properties**. The **Calendar Properties** dialog box displays.

2. Select the **Permissions** tab.


Calendar Properties
General
Home Page
AutoArchive
Administration
Forms
Permissions
Synchronization
Add...
Remove
Properties...
Permissions
OK
Cancel
Apply
Help

Name:	Permission Level:
Default	None
PGW Information Technology	Reviewer
PGW IT Consultants	Reviewer

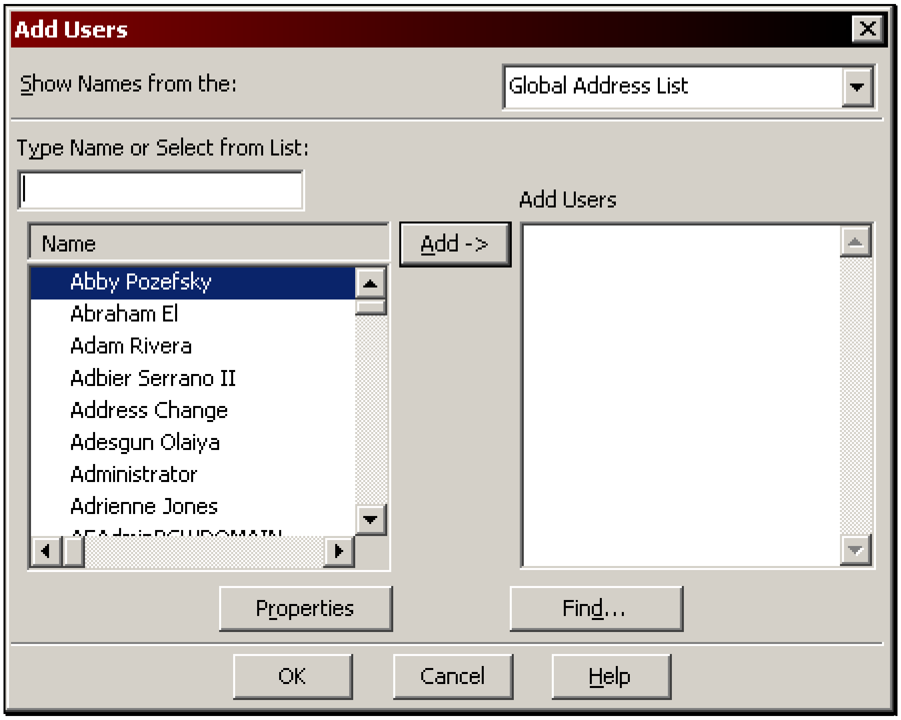
Permission Level: None

☐ Create items
☐ Folder owner
☐ Read items
☐ Folder contact
☐ Create subfolders
☐ Folder visible

Edit items
● None
○ Own
○ All

Delete items
● None
○ Own
○ All

3. Click **Add**. The **Add Users** dialog box displays:


Add Users
Add ->
Add Users
Properties
Find...
OK
Cancel
Help

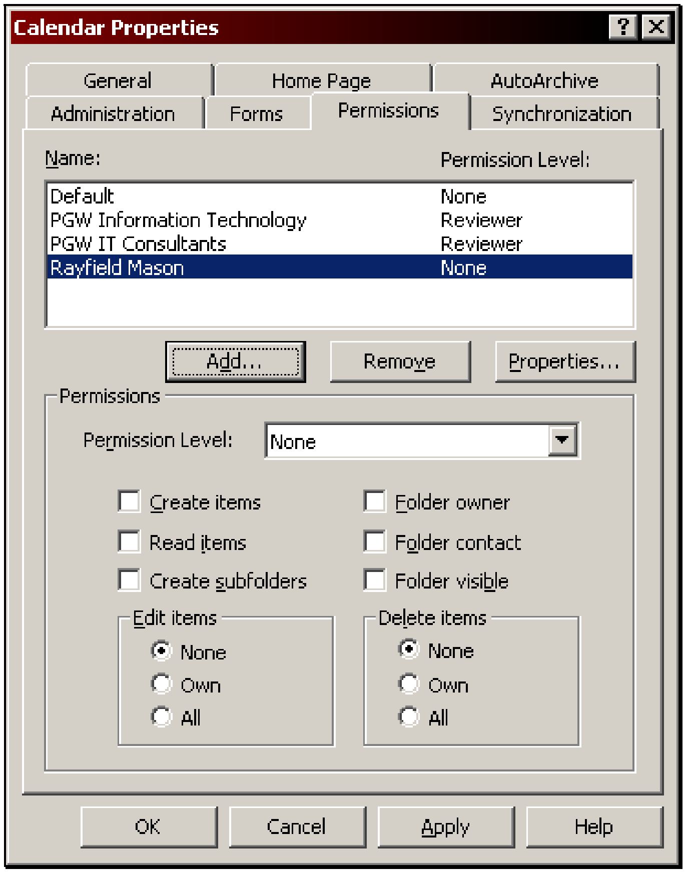
Show Names from the: Global Address List

Type Name or Select from List:

Name
Abby Pozefsky
Abraham El
Adam Rivera
Adbier Serrano II
Address Change
Adesgun Olaiya
Administrator
Adrienne Jones

4. Select a user name or names, or distribution list, and click **Add**.

5. Click **OK** when completed. The **Name** list of the **Permission** tab displays the added user, users, or distribution list with a **Permission Level** of **None**.


Calendar Properties
General
Home Page
AutoArchive
Administration
Forms
Permissions
Synchronization
Add...
Remove
Properties...
OK
Cancel
Apply
Help

Name:	Permission Level:
Default	None
PGW Information Technology	Reviewer
PGW IT Consultants	Reviewer
Rayfield Mason	None

Permissions

Permission Level: None

☐ Create items
☐ Read items
☐ Create subfolders
☐ Folder owner
☐ Folder contact
☐ Folder visible

Edit items
● None
○ Own
○ All

Delete items
● None
○ Own
○ All

6. Select a **Name** in the list and assign a **Permission Level** from the drop-down list. The following table describes the access granted for each **Permission Level**:

Option	Description
Owner	The user has all permissions and can edit and delete all items, including those they do not own.
Publishing Editor	The user has all permissions and can edit and delete all items but does not own the folder.
Editor	The user has all permissions except the ability to create subfolders or act as the folder's owner. Editors can edit and delete all items.
Publishing Author	Has all permissions except the ability to edit or delete items belonging to others and has the ability to act as the folder's owner.
Author	This level is the same as Publishing Author except Authors can't create subfolders.
Nonediting Author	Users can create and read items and delete items they own, but they can't delete others' items or create subfolders.
Reviewer	Users can view items but can't modify or delete items or create subfolders.
Contributor	Users can create items but not view or modify existing ones.
None	The folder is visible but users can't read, create, or modify any items in the folder.

7. If none of the predefined **Permission Levels** are satisfactory, create a custom set of permissions using the check boxes and option buttons. The following table lists what each permission allows a user to do:

Option	Description
Create Items	User can post items to the folder.
Read Items	User can read items in the folder.
Create Subfolders	User can create additional folders inside the folder.
Folder Owner	The owner has all permissions for the folder.
Folder Contact	The folder contact receives automated messages from the folder such as requests from users for additional permissions and other changes to the folder status.
Folder Visible	User can see the folder.
Edit Items	User can edit all items or only those items they own.
Delete Items	User can delete all items or only those items they own.

8. Click **OK** when completed.

Tip:

- To revoke a user's permission, select their name in the **Permissions** tab and click **Remove**.
- It may be necessary for both the user granting permission and the user receiving permission to exit Outlook and start again in order for the permissions to take effect.

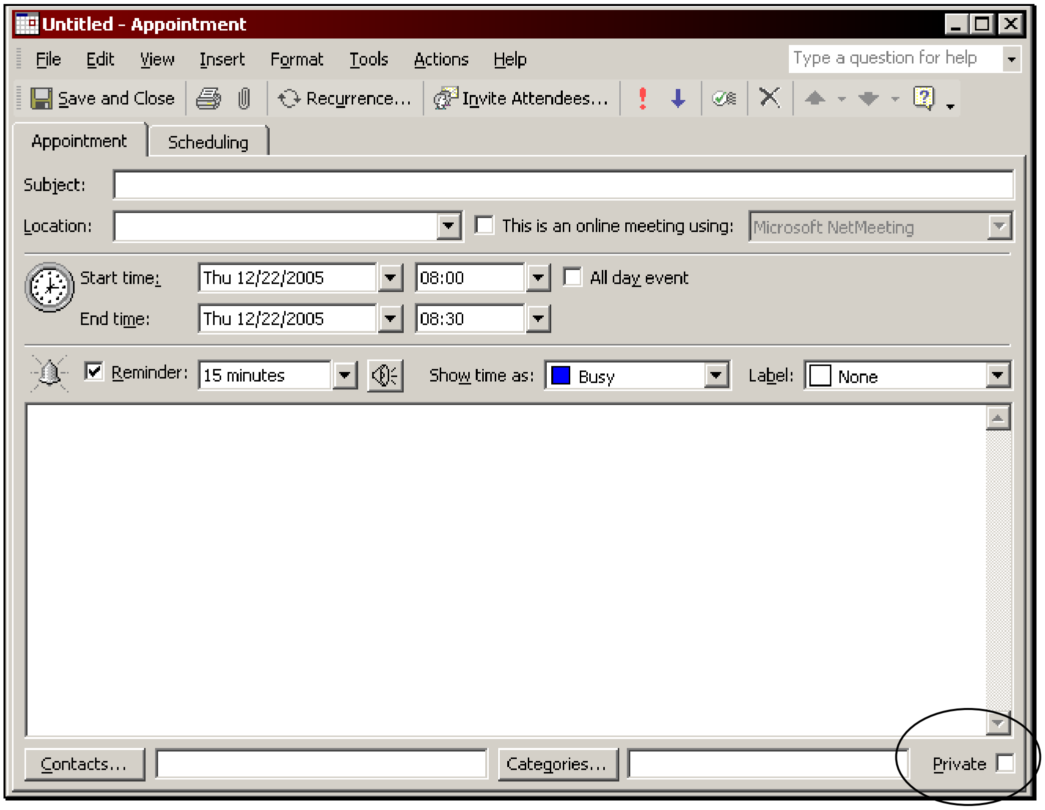
Marking a Calendar Item as Private

Marking an appointment or meeting as private will make the description of that item unavailable to all users except the author. This allows the author to have items on their calendar that cannot be read by delegates or other users with read permission.

Procedure:

1. Create a new calendar item and fill out the required fields or open an existing item.

2. Check the box labeled **Private**.


Untitled - Appointment
File
Edit
View
Insert
Format
Tools
Actions
Help
Type a question for help
Save and Close
Recurrence...
Invite Attendees...
Appointment
Scheduling
Contacts...
Categories...

Subject:

Location:

☐ This is an online meeting using: Microsoft NetMeeting

Start time: Thu 12/22/2005 08:00 ☐ All day event

End time: Thu 12/22/2005 08:30

☑ Reminder: 15 minutes

Show time as: Busy

Label: None

Private ☐

3.
Save and Close

Click the **Save and Close** button on the item toolbar.

Forwarding Calendar Items to Local Users

Any calendar item can be forwarded to another local user so that they can add it to their calendar. This is not the same as creating a meeting. With a meeting, the calendar items of the meeting organizer and attendees are “connected”. When forwarding, a copy of the item is sent to the destination user and there is no connection between the original and the copy.

Forwarding calendar items works well for situations such as classes, workshops, or parties where the list of attendees may be constantly changing. The organizer of the event can simply forward a calendar item to each attendee at the time of their sign up, which the attendee can then add to their own calendar. However, if the event is cancelled, each user will have to remove the item from their calendar individually.

The forwarded item inherits all the properties and settings of the original calendar item. For instance, if the item had a 30-minute reminder set, the forwarded item will have a 30-minute reminder as well.

When a forwarded calendar item is received, it can easily be added to the calendar.

Procedure: (To forward a calendar item)

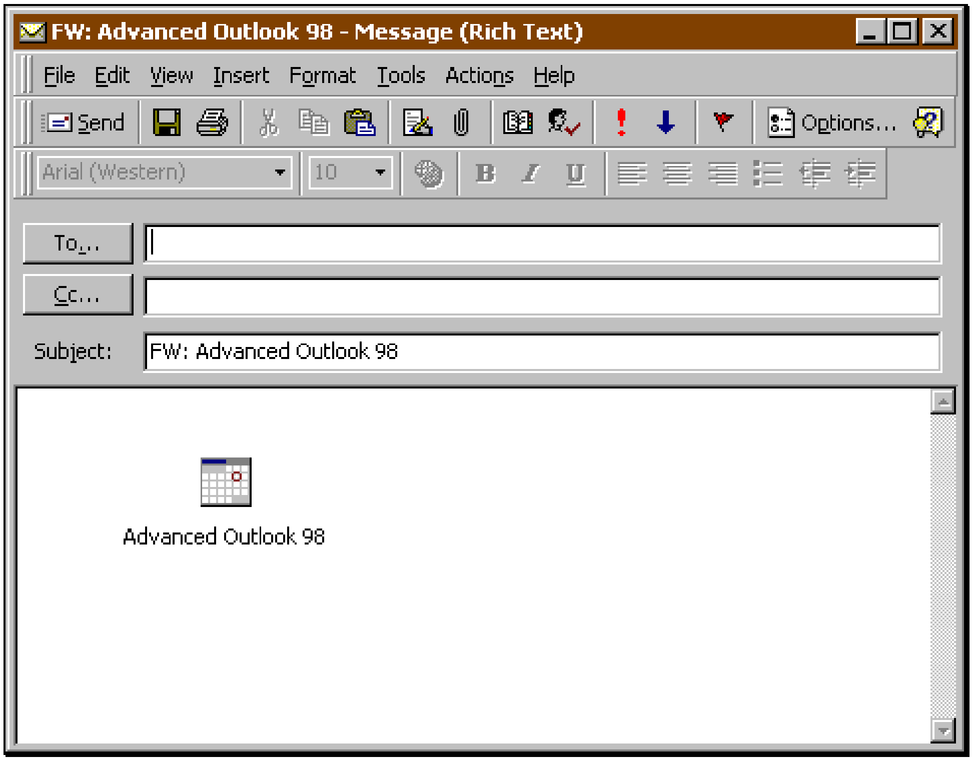
1. *Right*-click the calendar item and choose **Forward**.

OR

Select the calendar item. Select the **Actions** menu and choose **Forward**.

OR

Select the calendar item. Press **[Ctrl]** + **[F]**. A forward e-mail window displays with the calendar item as an attachment in the message:


FW: Advanced Outlook 98 - Message (Rich Text)
File Edit View Insert Format Tools Actions Help
Send
Options...
Arial (Western)
10
B I U
To...
Cc...

Subject: FW: Advanced Outlook 98

Advanced Outlook 98

2. Select the user or users to receive the message. The item can be forwarded to a single user, multiple users, or a distribution list.

3. Type a message and/or add any other e-mail options as desired.

4. Send Click **Send** on the e-mail toolbar when completed.

Procedure: (To add a forwarded item to the calendar)

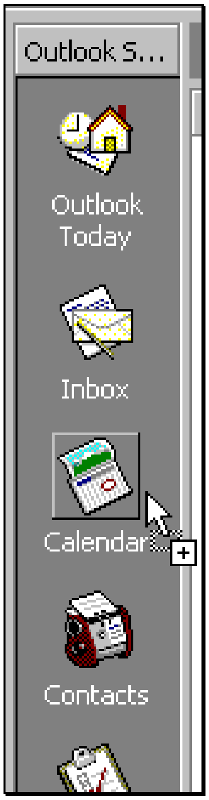
1. **Open** the message containing the calendar item or view it in the Preview Pane.

2. Drag the icon in the message to the **Calendar** icon on the Outlook shortcut bar.

OR

Drag the icon in the message to the **Calendar** folder in the folder list.

© 0A316


Outlook S...
Outlook Today
Inbox
Calendar
Contacts

3. When the plus sign appears next to the pointer, release the mouse.

4. The calendar item will be added to the calendar.

Tip:

- To view the details of the item before adding it to the calendar, *double*-click the icon in the message. The item will open as a separate window. **Close** the item window before adding the item to the calendar.

Forwarding Calendar Items to Outside Users

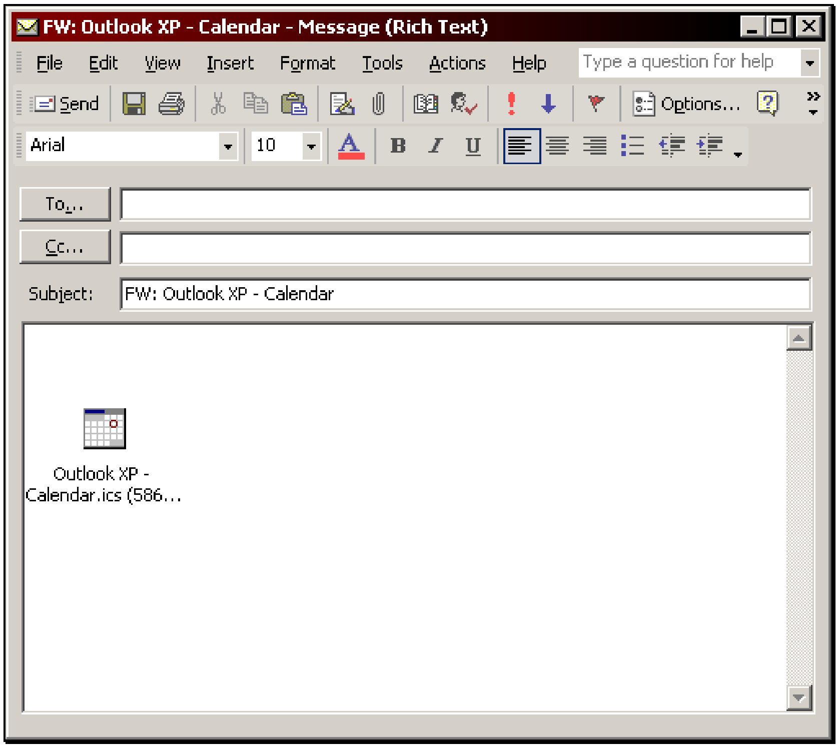
Outlook users can share calendar items with others who are not on the local e-mail system or with people do not use Outlook. Outlook offers two formats for exchanging calendar items – **iCalendar** and **vCalendar**.

iCalendar and vCalendar are internet-based standards for exchanging calendar information between people who use different calendaring programs. iCalendar is essentially a newer version of vCalendar and should be the first choice when sending calendar items to Internet users.

Procedure: (To forward an iCalendar item)

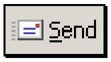
1. **Select** or **Open** the calendar item to be sent.

2. Select the **Actions** menu and choose **Forward as iCalendar**. A **Message** window with the calendar item as an attachment displays:


FW: Outlook XP - Calendar - Message (Rich Text)
File
Edit
View
Insert
Format
Tools
Actions
Help
Type a question for help
Send
Options...
Arial
10
B
I
U
To...
Cc...
Subject:
Outlook XP -
Calendar.ics (586...

Subject: FW: Outlook XP - Calendar

3. Enter the recipient's Internet e-mail address and set any other message options as desired.

4. 

Click **Send** on the **Message** toolbar when completed.

Chapter 7 – Sharing Calendars

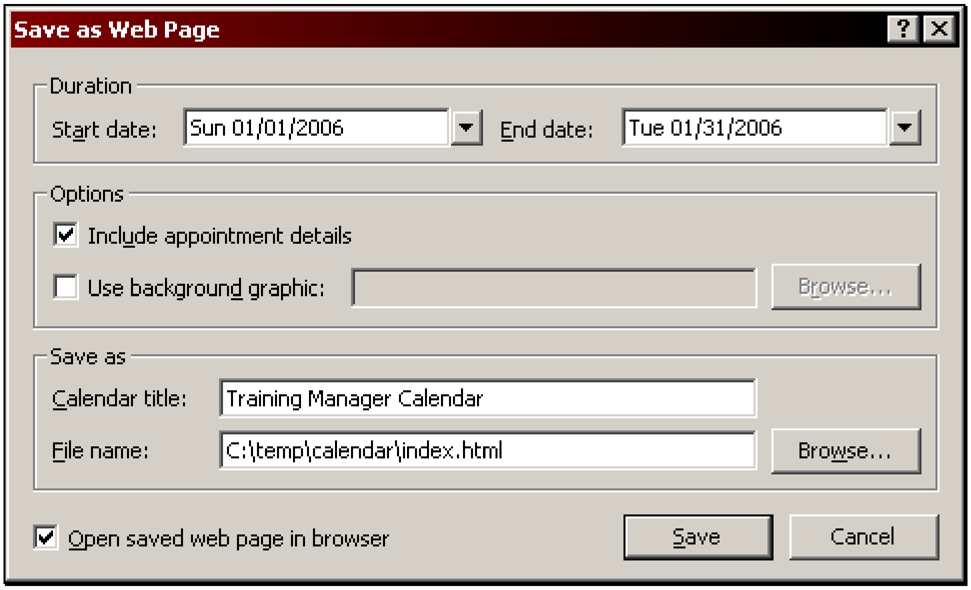
Publishing a Calendar as a Web Page

Another method for allowing users who are not running Outlook or are outside the local e-mail system to view a calendar is to save it as Web page. The calendar can be saved to any Web server using FTP, and to some servers using HTTP.

The **Save as Web Page** feature creates a very functional online calendar that can be easily viewed with any web browser, without requiring any knowledge of HTML, a common web page language.

Procedure:

1. From the calendar folder, select the **File** menu and choose **Save as Web Page**. The **Save as Web Page** dialog box displays:



Start date: Sun 01/01/2006
End date: Tue 01/31/2006
☑ Include appointment details
☐ Use background graphic:
Calendar title: Training Manager Calendar
File name: C:\temp\calendar\index.html
☑ Open saved web page in browser

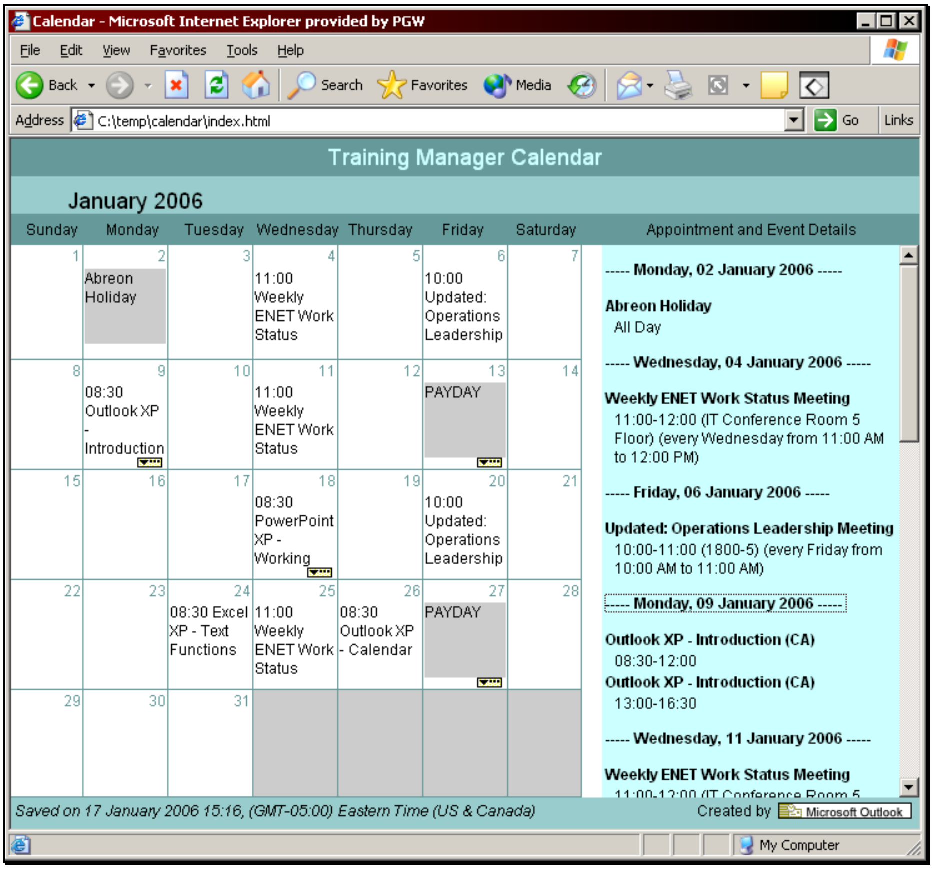
2. Use the following table to complete the options is this dialog box:

Option	Description
Start/End date	Use the drop-down boxes to select the date range for the calendar to be published.
Include appointment details	Select this check box to publish the details of the calendar items' **Notes** area with the calendar.

Option	Description
Use background graphic	Select this option to use an image as a background for the calendar. Type a pathname to the file in the box, or click **Browse** to select an image file.
Calendar title	Enter a name or title for the calendar that will appear at the top of the web browser. Defaults to the user's name.
File name	Type a path name or click **Browse** to select the directory where the web page(s) should be saved. This can either be a local or network directory, or a web or FTP server.
Open saved web page in browser	Displays the resulting calendar output in the default web browser.

3. When all desired options have been selected, click **Save**.

4. Outlook creates the calendar HTML files, and if selected, displays the calendar in the web browser:



Address C:\temp\calendar\index.html

Training Manager Calendar

January 2006

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2 Abreon Holiday	3	4 11:00 Weekly ENET Work Status	5	6 10:00 Updated: Operations Leadership	7
8	9 08:30 Outlook XP - Introduction	10	11 11:00 Weekly ENET Work Status	12	13 PAYDAY	14
15	16	17	18 08:30 PowerPoint XP - Working	19	20 10:00 Updated: Operations Leadership	21
22	23	24 08:30 Excel XP - Text Functions	25 11:00 Weekly ENET Work Status	26 08:30 Outlook XP - Calendar	27 PAYDAY	28
29	30	31				

Appointment and Event Details

----- **Monday, 02 January 2006** -----

Abreon Holiday
All Day

----- **Wednesday, 04 January 2006** -----

Weekly ENET Work Status Meeting
11:00-12:00 (IT Conference Room 5 Floor) (every Wednesday from 11:00 AM to 12:00 PM)

----- **Friday, 06 January 2006** -----

Updated: Operations Leadership Meeting
10:00-11:00 (1800-5) (every Friday from 10:00 AM to 11:00 AM)

----- **Monday, 09 January 2006** -----

Outlook XP - Introduction (CA)
08:30-12:00
Outlook XP - Introduction (CA)
13:00-16:30

----- **Wednesday, 11 January 2006** -----

Weekly ENET Work Status Meeting
11:00-12:00 (IT Conference Room 5

Saved on 17 January 2006 15:16, (GMT-05:00) Eastern Time (US & Canada)

Created by Microsoft Outlook

5. When finished previewing, **Close** the web browser.

Tip:

- The **Save as Web Page** dialog box will remember the previous settings used. This makes it easy to publish calendars on a regular basis without having to re-enter all of the options.
- Once displayed in the web browser, click any date to have the **Appointment and Event Details** list scroll to that date’s details.

Warning:

- The calendar created by this method is not dynamic, that is, if changes are made to the Outlook calendar, the web version will have to be created again with the new details and uploaded again to the server.

Chapter 8

Printing Calendars

Chapter Objectives:

- Printing Individual Calendar Items
- Printing in Calendar-Based Views
- Printing in Table-Based Views
- Changing the Page Setup Options
- Creating a Custom Print Style
- Deleting a Print Style
- Resetting a Print Style

Chapter 8 – Printing Calendars

Overview

Many people work in Outlook and never print any of the items in the calendar. For others, the ability to print calendars and individual items is important, such as for use in a day planner or appointment book.

The type of printout that can be created depends on the initial view of the calendar. The following table lists the default views for the calendar, the view type, and the print styles available for each view.

View Name	View Type	Available Print Styles
Day/Week/Month **Day/Week/Month with AutoPreview**	**Calendar**	Daily, Weekly, Monthly, Tri-Fold, Calendar Details
Active Appointments **Events** **Annual Events** **Recurring Appointments** **By Category**	**Table**	Table, Memo

This chapter examines the options and methods for printing calendars, appointments, and meetings. It also explains how to customize the print styles provided by Outlook to create custom styles to suit an individual's preferences or needs.

Printing Individual Calendar Items

Any individual calendar item, such as an event, appointment, or meeting, can be printed. Individual items are printed in memo style. Each item must be selected and printed separately.

Multiple individual items can be printed at once, however, a table-based view (see table above) must be selected first. See **Printing in Table-Based Views** later in this chapter for more information.

Procedure: (To print one copy of an item to the default printer)

1. *Right*-click the item and select **Print** from the pop-up menu.

OR

Open the item and click the **Print** button on the item toolbar.

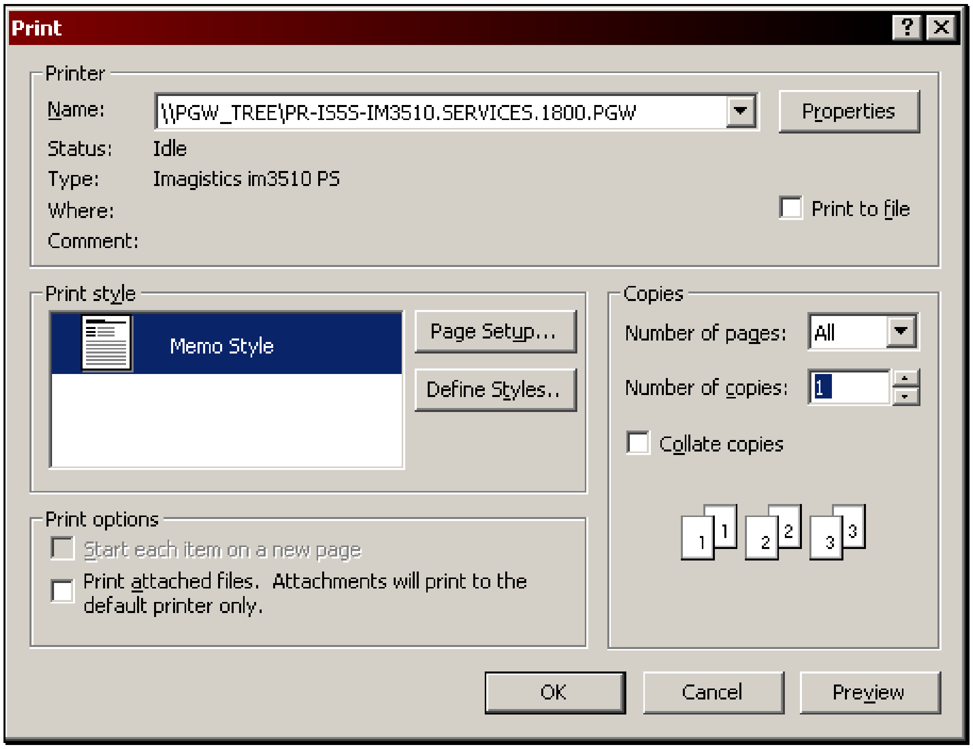
OR

Open the item, select the **File** menu, choose **Print**, and then click **OK**.

2. One copy of the item will be printed to the default printer.
3. **Close** the item if necessary.

Procedure: (To access the Print dialog box and set options)

1. **Open** the item to be printed.
2. Select the **File** menu and choose **Print**. The **Print** dialog box displays:



Printer
Name: \\PGW_TREE\PR-I55S-IM3510.SERVICES.1800.PGW
Status: Idle
Type: Imagistics im3510 PS
Where:
Comment:
☐ Print to file

Print style
Memo Style

Copies
Number of pages: All
Number of copies: 1
☐ Collate copies

Print options
☐ Start each item on a new page
☐ Print attached files. Attachments will print to the default printer only.

3. To select a printer other than the default printer, select the **Name** drop-down list in the **Printer** area and choose a printer.

4. In the **Print style** area, click **Page Setup** to access options for the appearance of the printout. (See the **Changing the Page Setup Options** topic in this chapter for more information.)

5. In the **Copies** area, select the number of copies to be printed.

6. In the **Print Options** area, select the **Print attached files** check box if any item attachments should be printed.

7. To preview the printout, click **Preview**. Click the **Print** button on the **Print Preview** toolbar to return to the **Print** dialog box.

8. Click **OK** to print the item.

Tips:

- **Memo** style is the only option for printing individual calendar items, however, custom print styles can be created based on the memo style and saved in the **Print style** list. See **Creating a Custom Print Style** later in this chapter for more information.

Chapter 8 – Printing Calendars

Printing in Calendar-Based Views

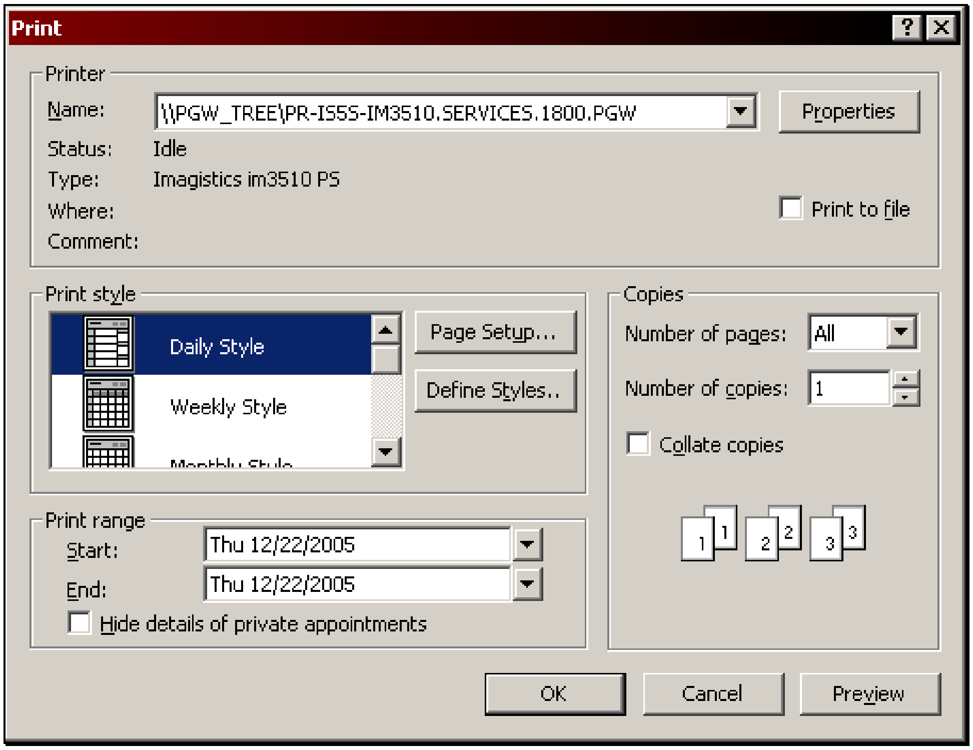
Printing in a calendar-based view is the most common way to print in Outlook. These printouts are the ones that most closely resemble traditional calendars. Outlook offers several basic calendar print styles that can be customized to suit a variety of needs.

Procedure:

1. Select a calendar-based view (see the table at the beginning of this chapter for the default calendar-based views).
2. Select the **File** menu and choose **Print**.

OR

Click the **Print** button on the **Calendar** toolbar. The **Print** dialog box displays:



Print

Printer

Name: \\PGW_TREE\PR-ISSS-IM3510.SERVICES.1800.PGW

Status: Idle

Type: Imagistics im3510 PS

Where:

Comment:

☐ Print to file

Print style: Daily Style

Copies

Number of pages: All

Number of copies: 1

☐ Collate copies

Print range

Start: Thu 12/22/2005

End: Thu 12/22/2005

☐ Hide details of private appointments

3. To select a printer other than the default printer, select the **Name** drop-down list in the **Printer** area and choose a printer.

4. Select a **Print style**. This list will default to the style that most closely matches the current calendar view, however, any style can be selected. The following table describes the built-in print styles:

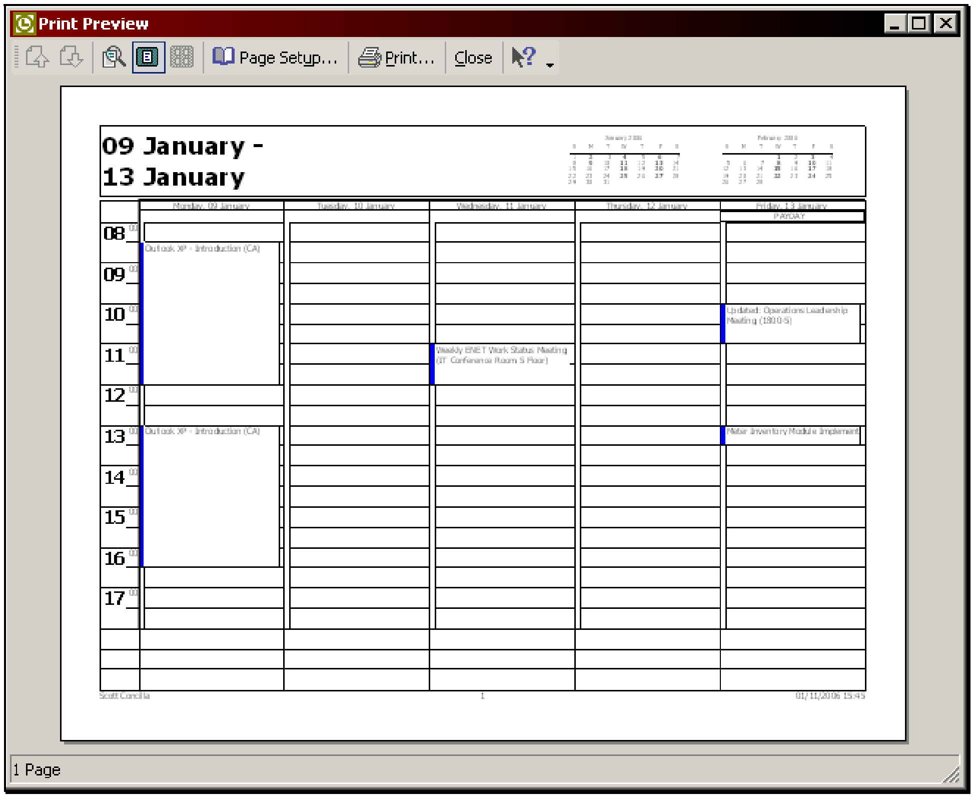
Print Style	Description
Daily	Prints one day per page.
Weekly	Prints one work week (as defined in the calendar **Options**) per page.
Monthly	Prints five weeks in a month style per page starting with the week of the selected start date.
Tri-Fold	Divides the page into three sections (left, middle, and right). Defaults to a Daily calendar on the left, a TaskPad in the middle, and a Weekly calendar on the right.
Calendar Details	Prints calendar items with their full details as a running list with daily group headers.

5. If desired, click **Page Setup** to access options for the appearance of the printout. (See the **Changing the Page Setup Options** topic in this chapter for more information.)

6. In the **Print Range** area, use the **Start** and **End** drop down menus to select the date range to be printed.

7. In the **Copies** area, select options for the number of copies, what pages should print (all, even, odd), and if multiple pages should be collated.

8. To view a preview of the printout, select **Preview**. The **Print Preview** window displays:



09 January - 13 January

	Monday, 09 January	Tuesday, 10 January	Wednesday, 11 January	Thursday, 12 January	Friday, 13 January
					PAYDAY
08 00	Outlook XP - Introduction (CA)				
09 00					
10 00					Updated: Operations Leadership Meeting (1800-5)
11 00			Weekly ENET Work Status Meeting (IT Conference Room 5 Floor)		
12 00					
13 00	Outlook XP - Introduction (CA)				Meter Inventory Module Implement
14 00					
15 00					
16 00					
17 00					

Scott Concilla 1 01/11/2006 15:45

9. Click the **Print** button on the **Print Preview** toolbar to return to the **Print** dialog box.

10. Click **OK** to print.

Printing in Table-Based Views

Printing in a table-based view is ideal when a list of calendar items of a particular type is desired. Table-based views are also the only way to print multiple individual items without having to select them one at a time.

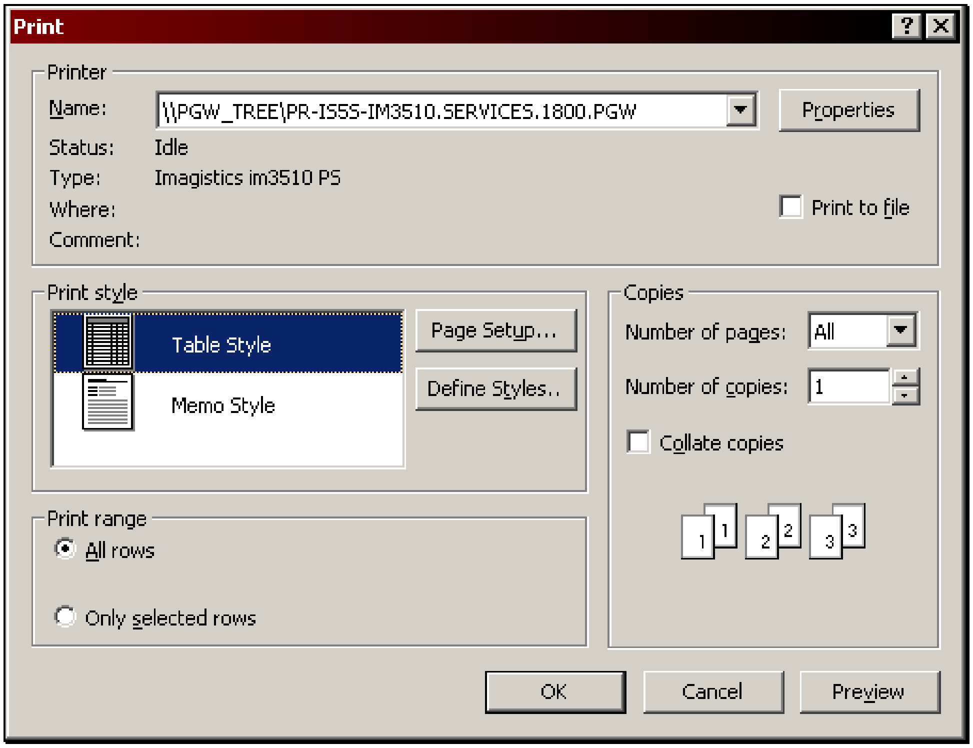
When printing in a table-based view, only the **Table** and **Memo** print styles are available. The **Table** print style prints items in rows with column headings, similar to a Word table or Excel spreadsheet. The **Memo** print style prints the entire contents of an item before printing the next item, similar to printing records in Access.

Procedure:

1. Select a table-based calendar view (see the table at the beginning of this chapter for the default table-based views).
2. If desired, hold down the **[Ctrl]** or **[Shift]** keys and click with the mouse to select individual items to be printed.
3. Select the **File** menu and choose **Print**.

OR

Click the **Print** button on the **Calendar** toolbar. The **Print** dialog box displays:


Print
Printer
Properties
Print style
Page Setup...
Define Styles..
Copies
Print range
1 1 2 2 3 3
OK
Cancel
Preview

Name: \\PGW_TREE\PR-I555-IM3510.SERVICES.1800.PGW
Status: Idle
Type: Imagistics im3510 PS
Where:
Comment:
☐ Print to file

Print style: Table Style (selected), Memo Style

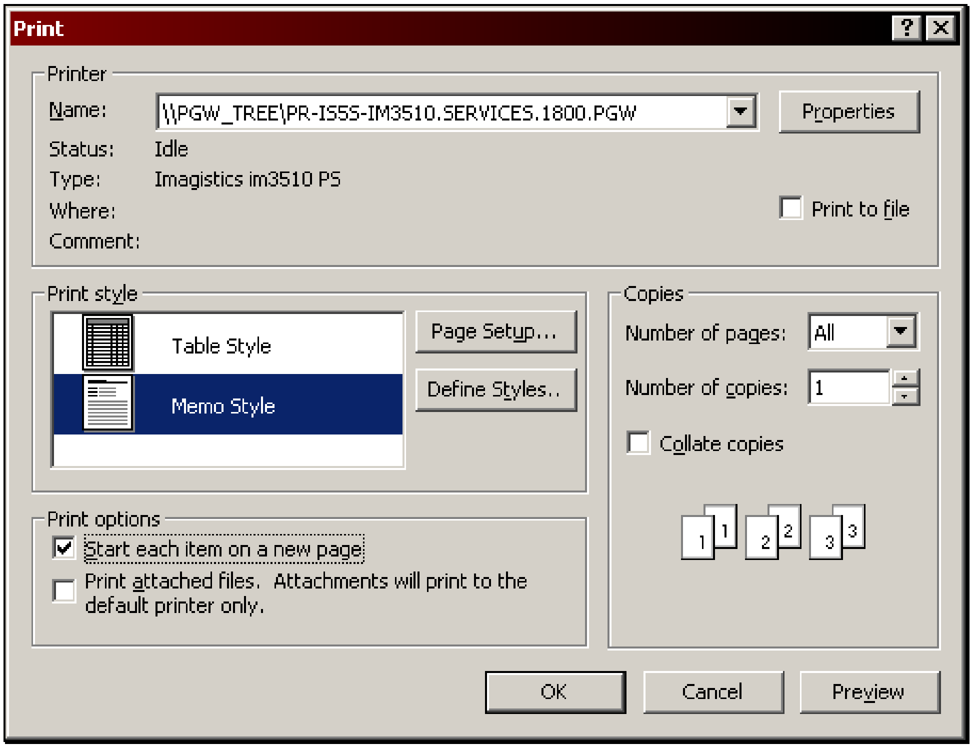
Number of pages: All
Number of copies: 1
☐ Collate copies

● All rows
○ Only selected rows

4. Select either the **Table** or **Memo** print style.

5. If the **Table** print style is selected, select either **All rows** in the **Print Range** area to print all items in the list, or select **Only selected rows** to print only the items that were selected in step #2.

6. If the **Memo** print style is selected, select the **Start each item on a new page** check box to have each item in the table printed on a separate sheet of paper, or uncheck the box to have multiple items printed on a page. Select the **Print attached files** check box to additionally print any attachments that the calendar items may have.


Print
?
Printer
Properties
Print style
Page Setup...
Define Styles..
Copies
Print options
1 1
2 2
3 3
OK
Cancel
Preview

Name: \\PGW_TREE\PR-IS5S-IM3510.SERVICES.1800.PGW
Status: Idle
Type: Imagistics im3510 PS
Where:
Comment:
☐ Print to file

Table Style
Memo Style

Number of pages: All
Number of copies: 1
☐ Collate copies

☑ Start each item on a new page
☐ Print attached files. Attachments will print to the default printer only.

7. If desired, click **Page Setup** to access options for the appearance of the printout. (See the **Changing the Page Setup Options** topic in this chapter for more information.)

8. Select any other **Printer** and **Copies** options as desired.

9. To view a preview of the printout, click **Preview**. Click the **Print** button on the **Print Preview** toolbar to return to the **Print** dialog box.

10. Click **OK** to print.

Changing the Page Setup Options

In all print styles, Outlook offers the ability to customize the printout that is created. The **Page Setup** dialog box has three main tabs – **Format**, **Paper**, and **Header/Footer**. The **Paper** and **Header/Footer** tabs are the same for every print style, however, the **Format** tab will offer different options for each print style.

If the page setup options are changed for a particular print style, those settings are maintained by Outlook for subsequent printings. For instance, if the **Daily** style is changed from portrait to landscape orientation, it will always print as landscape until it is reset or changed again.

The **Page Setup** dialog box also plays a key role in creating custom print styles as described later in this chapter.

The following procedure describes how to access the page setup options. The subsections describe each tab and its parts in detail.

Procedure:

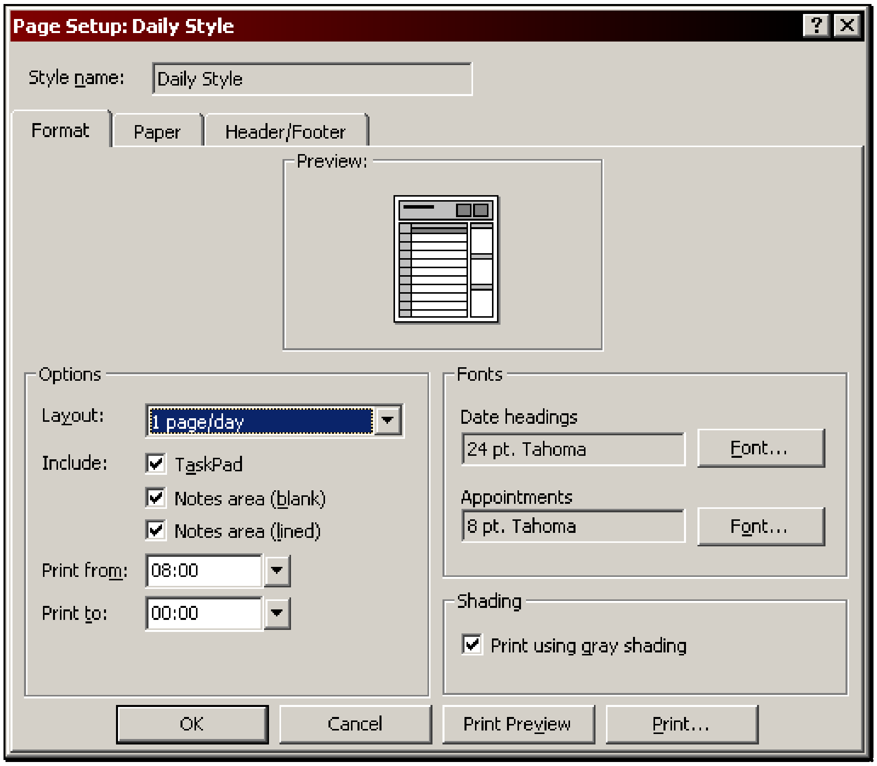
1. Open the **Print** dialog box as described in the previous procedures.
2. Click **Page Setup**.
3. Using the **Format**, **Paper**, and **Header/Footer** tabs, select the desired print options.
4. Click **OK** or **Print** to return to the **Print** dialog box, or click **Print Preview** to view a preview.
5. Click **OK** in the **Print** dialog box to print.

Tip:

- Due to the number of options for print styles, it is recommended that **Print Preview** be used before printing to determine if the printout contains the correct and/or desired options. Click the **Page Setup** button on the **Print Preview** toolbar to return to the dialog box if needed to make changes.

The Format Tab

This tab controls what elements should appear on a printout and what fonts should be used. It contains three sections – **Options**, **Fonts**, and **Shading**. The **Format** tab of the **Daily Style** is pictured below.


Page Setup: Daily Style
Format
Paper
Header/Footer
Preview:
Options
Fonts
Shading
Font...
Font...
OK
Cancel
Print Preview
Print...

Style name: Daily Style

Layout: 1 page/day

Include:
☑ TaskPad
☑ Notes area (blank)
☑ Notes area (lined)

Print from: 08:00

Print to: 00:00

Date headings: 24 pt. Tahoma

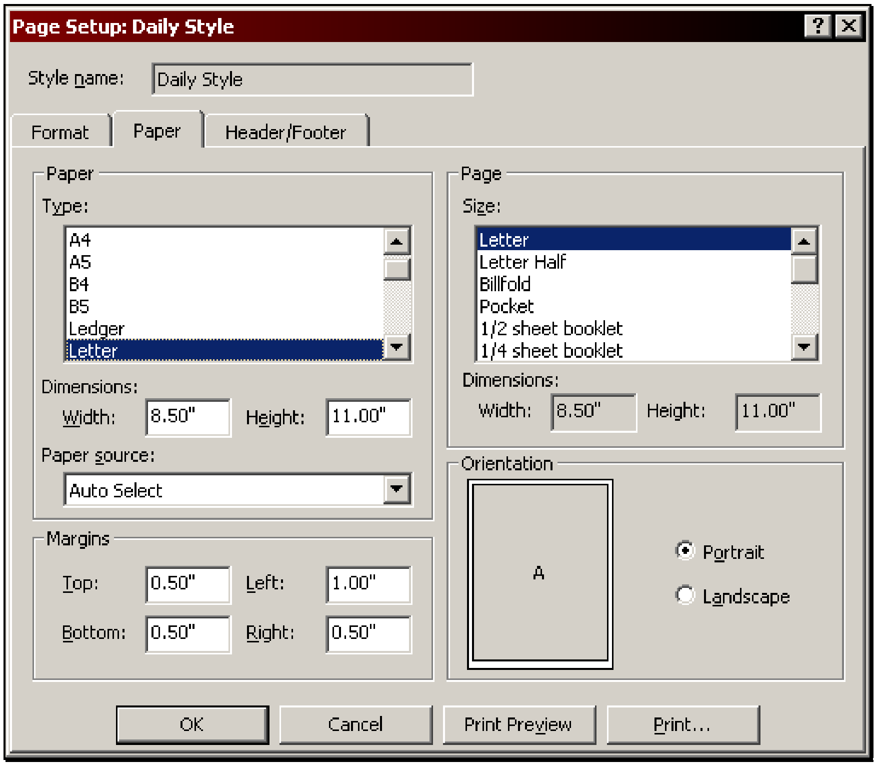
Appointments: 8 pt. Tahoma

☑ Print using gray shading

Section	Description
Options	In calendar-based print styles (**Daily**, **Weekly**, **Monthly**, etc.) this section will have different options available for every print style. Use the available drop-down lists and check boxes to customize the printout. The **Table** and **Memo** print styles do not have any options in this section.
Fonts	Select the font for a particular section. This area will have different options dependent on the selected print style.
Shading	Select this check box to have light gray shading added to headings, dates, and other elements.

The Paper Tab

This tab controls the settings for the paper that the printout will appear on and the page layout.



Style name: Daily Style

Paper

Type: Letter

Dimensions: Width: 8.50" Height: 11.00"

Paper source: Auto Select

Page

Size: Letter

Dimensions: Width: 8.50" Height: 11.00"

Margins

Top: 0.50" Left: 1.00"

Bottom: 0.50" Right: 0.50"

Orientation

● Portrait

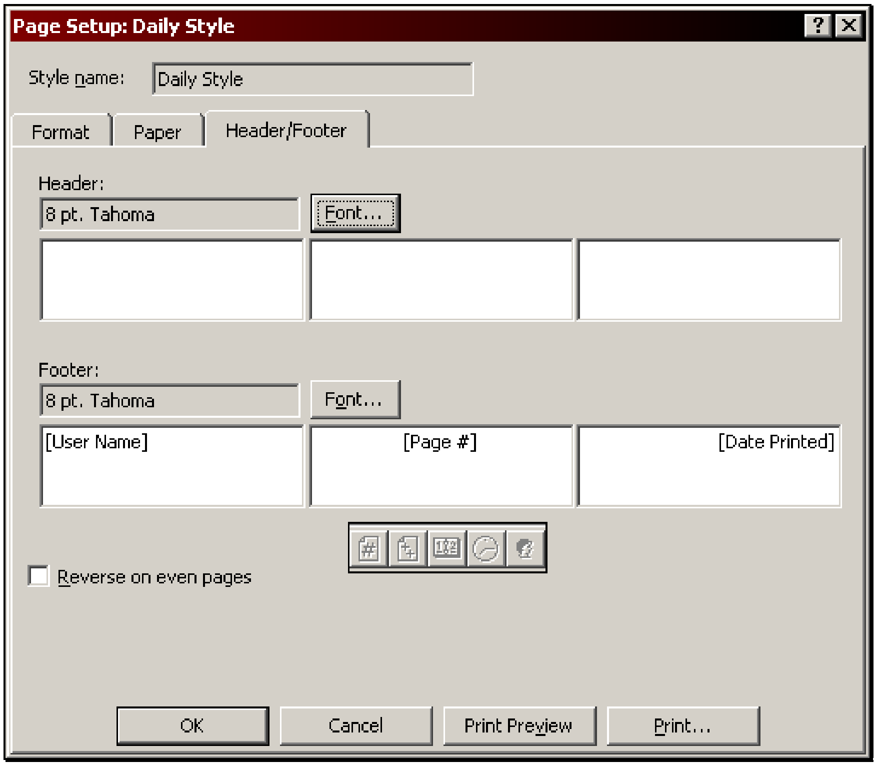
○ Landscape

Page Setup: Daily Style
Format
Paper
Header/Footer
A4
A5
B4
B5
Ledger
Letter
Letter Half
Billfold
Pocket
1/2 sheet booklet
1/4 sheet booklet
A
OK
Cancel
Print Preview
Print...

Section	Description
Paper	Select a paper size from the **Type** box, or select **Custom** and then input the paper **Width** and **Height** in the **Dimensions** area. Use the **Paper Source** drop-down list to select a different paper tray on the printer (if available).
Page	Specifies the page layouts and sizes available for the paper selected in the **Type** box.
Margins	Use these boxes to set the top, bottom, left, and right margins for the printout.
Orientation	Selects the orientation of the paper – **Portrait** or **Landscape**. Also displays a preview of the page layout based on the **Paper** and **Page** settings.

The Header/Footer Tab

This tab contains options for the header and footer of a printout. Both the header and the footer are constructed in the same manner, with sections for the left side, middle, and right side. The tab has the same options for all print styles.


Page Setup: Daily Style
Format
Paper
Header/Footer
Font...
Font...
Reverse on even pages
OK
Cancel
Print Preview
Print...

Style name: Daily Style

Header: 8 pt. Tahoma

Footer: 8 pt. Tahoma

[User Name] [Page #] [Date Printed]

☐ Reverse on even pages

Section	Description
Header/Footer	Use the **Font** button to set a font for the text. Any text can be typed in the left, middle or right boxes, as well as automatic text can be inserted by using the insert buttons.
Insert Buttons	Use these buttons to automatically insert text into a header or footer. Left to right these buttons are **Page #**, **Total Pages**, **Date Printed**, **Time Printed**, and **Username**.
Reverse on even pages	Select this option to have the headers and footers reversed on even-numbered pages, i.e. on an even-numbered page the left sections will appear on the right and the right sections on the left.

Creating a Custom Print Style

Outlook provides a broad range of print styles for calendars, so it is likely that one of the styles will fit most printing needs. When these print styles don't quite offer what is needed, a custom print style can be created.

Outlook offers two methods for creating custom print styles – modifying an existing print style, or copying a style and then modifying the copy to incorporate the changes needed.

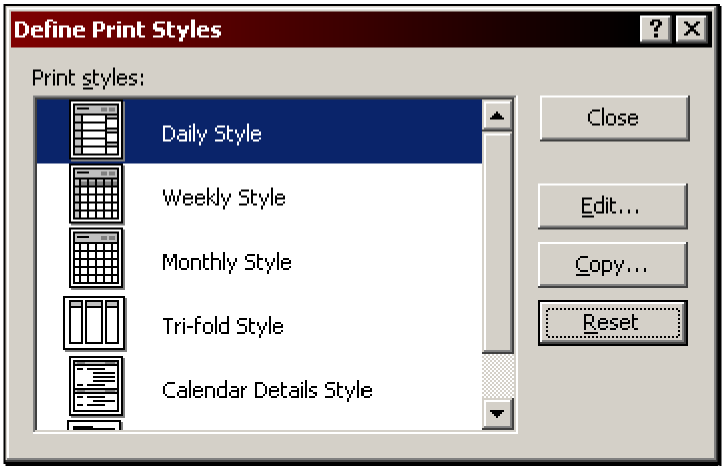
If the same modifications are always made to a particular print style, it would be best to simply modify that existing style rather than create a new one. If the default style is used occasionally but its properties are modified for most other print jobs, consider creating a custom print style based on the existing one so that both are available.

Procedure:

1. Select the **File** menu and choose **Print**. In the **Print** dialog box, click **Define Styles**.

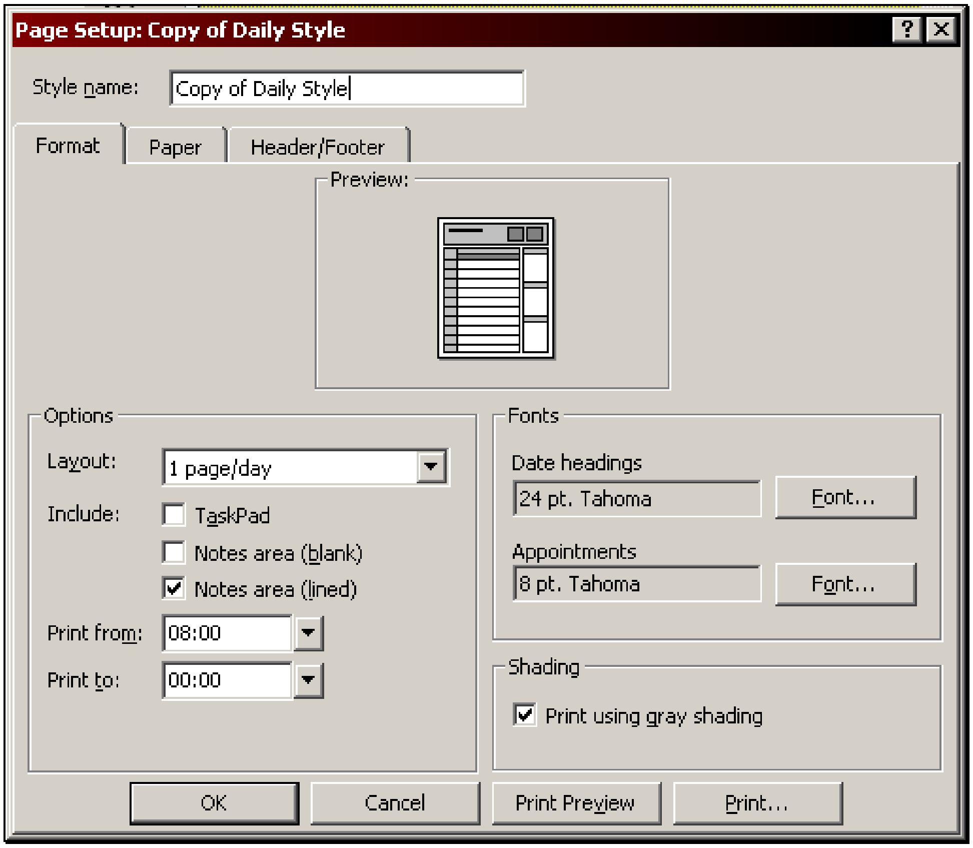
OR

Select the **File** menu, choose **Page Setup**, then **Define Print Styles**. The **Define Print Style** dialog box displays:


Define Print Styles
?
X
Print styles:
Daily Style
Weekly Style
Monthly Style
Tri-fold Style
Calendar Details Style
Close
Edit...
Copy...
Reset

2. Select a print style from the list.

3. To create a new style based on an existing style, click **Copy**. To modify an existing style, click **Edit**. The **Page Setup** dialog box displays:



Page Setup: Copy of Daily Style

Style name: Copy of Daily Style

Layout: 1 page/day

Include:
☐ TaskPad
☐ Notes area (blank)
☑ Notes area (lined)

Print from: 08:00

Print to: 00:00

Date headings: 24 pt. Tahoma

Appointments: 8 pt. Tahoma

☑ Print using gray shading

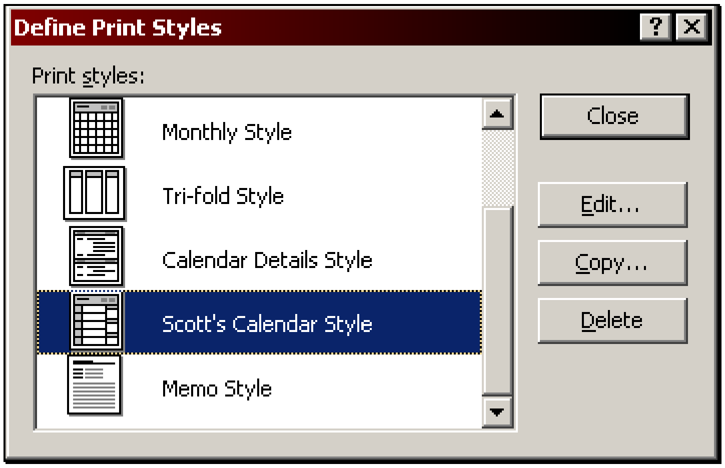
?
Format
Paper
Header/Footer
Preview:
Options
Fonts
Font...
Font...
Shading
OK
Cancel
Print Preview
Print...

4. If the style is a copy, enter a new **Style name**, otherwise this option will be dimmed.

5. Using the **Format**, **Paper**, and **Header/Footer** tabs, set the other print style options as desired. See **Changing the Page Setup Options** in this chapter for more information on the available options.

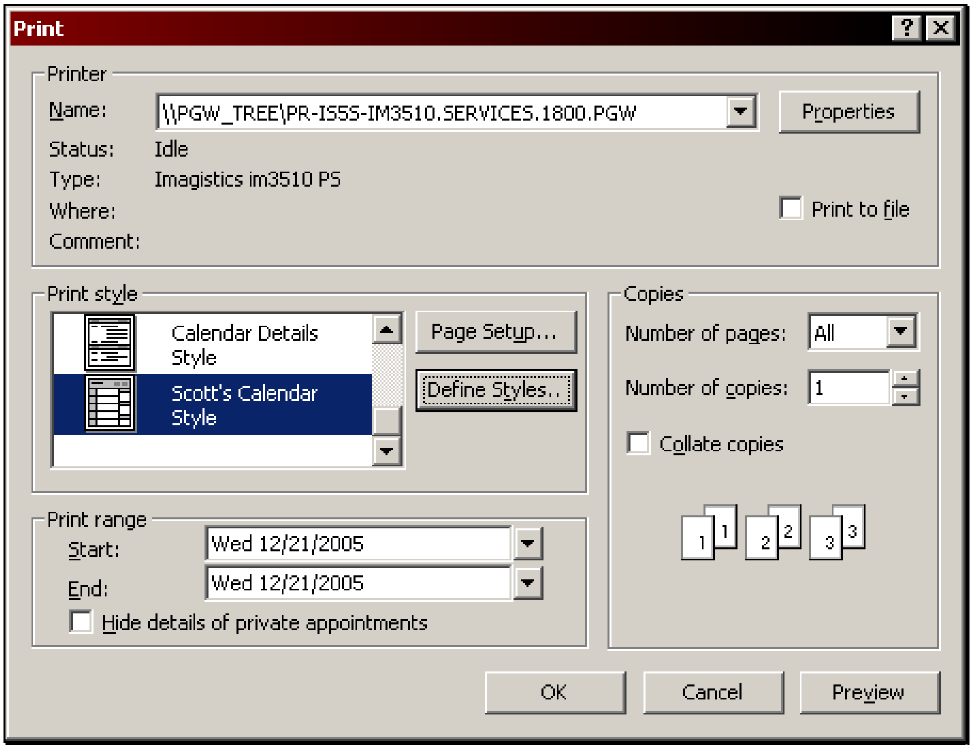
6. Click **OK** when completed.

7. If a new style was created it will now appear in the **Define Print Styles** list. It will also be available in the **Print style** list of the **Print** dialog box.


Define Print Styles
Close
Edit...
Copy...
Delete

Print styles:
Monthly Style
Tri-fold Style
Calendar Details Style
Scott's Calendar Style
Memo Style

New print style in the Define Print Styles dialog box


Print
Printer
Properties
Print style
Page Setup...
Define Styles...
Copies
Print range
OK
Cancel
Preview

Name: \\PGW_TREE\PR-IS5S-IM3510.SERVICES.1800.PGW
Status: Idle
Type: Imagistics im3510 PS
Where:
Comment:
☐ Print to file

Calendar Details Style
Scott's Calendar Style

Number of pages: All
Number of copies: 1
☐ Collate copies

Start: Wed 12/21/2005
End: Wed 12/21/2005
☐ Hide details of private appointments

New print style listed in the Print style area of the Print dialog box

8. Click **Close** to close the dialog box and (if open) return to the **Print** dialog box.

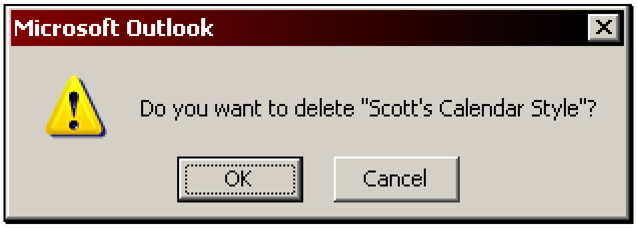
Deleting a Print Style

If custom print styles have been created but are no longer used or needed, they can be deleted from the print style list.

Procedure:

1. Open the **Define Print Styles** dialog box as described in the previous procedure.

2. Select the print style to be deleted and click **Delete**. The following message displays:



Do you want to delete "Scott's Calendar Style"?

3. Click **OK** to delete the style or **Cancel** to keep it.

4. Click **Close** to close the **Define Print Styles** dialog box.

Warning:

- Once deleted, a custom print style **cannot** be recovered with the **Undo** command, nor will it be present in the **Deleted Items** folder.

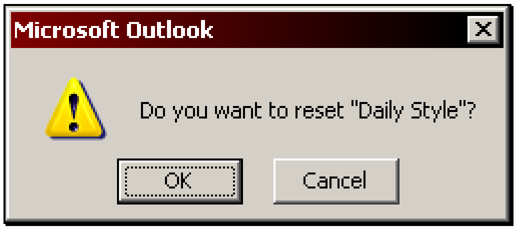
Resetting a Print Style

The standard print styles provided by Outlook cannot be deleted but they can be modified, either via the **Page Setup** settings or through the **Define Styles** option. This presents a problem if the user wishes to return the print style to its original setup, but does not remember the original settings.

Use the following procedure to have Outlook return a print style to its original default settings.

Procedure:

1. Open the **Define Print Styles** dialog box as described previously.
2. Select the print style to be restored to its original settings and click **Reset**. The following message displays:


Microsoft Outlook

Do you want to reset "Daily Style"?

3. Click **OK** to reset the style or **Cancel** to keep the modified settings.
4. Click **Close** to close the **Define Print Styles** dialog box.

Warning:

- Once reset, custom print style settings **cannot** be recovered with the **Undo** command. The custom settings will have be to be recreated.
- Since they are created by the user, custom print styles cannot be reset.

Chapter 9

Customizing the Calendar

Chapter Objectives:

- Setting Reminder Options
- Setting Calendar Options
- Setting the Planning Grid Options
- Adding Holidays as Events
- Setting Free and Busy Options
- Processing Meeting Requests Automatically
- Setting Time Zone Options
- Changing the Date Navigator Font
- Making Calendar the Default Outlook Folder
- Modifying a Calendar View

Chapter 9 – Customizing the Calendar

Overview

Outlook's calendar has an extensive number of options that can be set to control how it looks, behaves, and functions. This allows each user to configure the calendar in a way that works best for them.

This chapter will explore the many options users have available to them for configuring the calendar's options, as well as some of the features relating to modifying the calendar views.

Setting Reminder Options

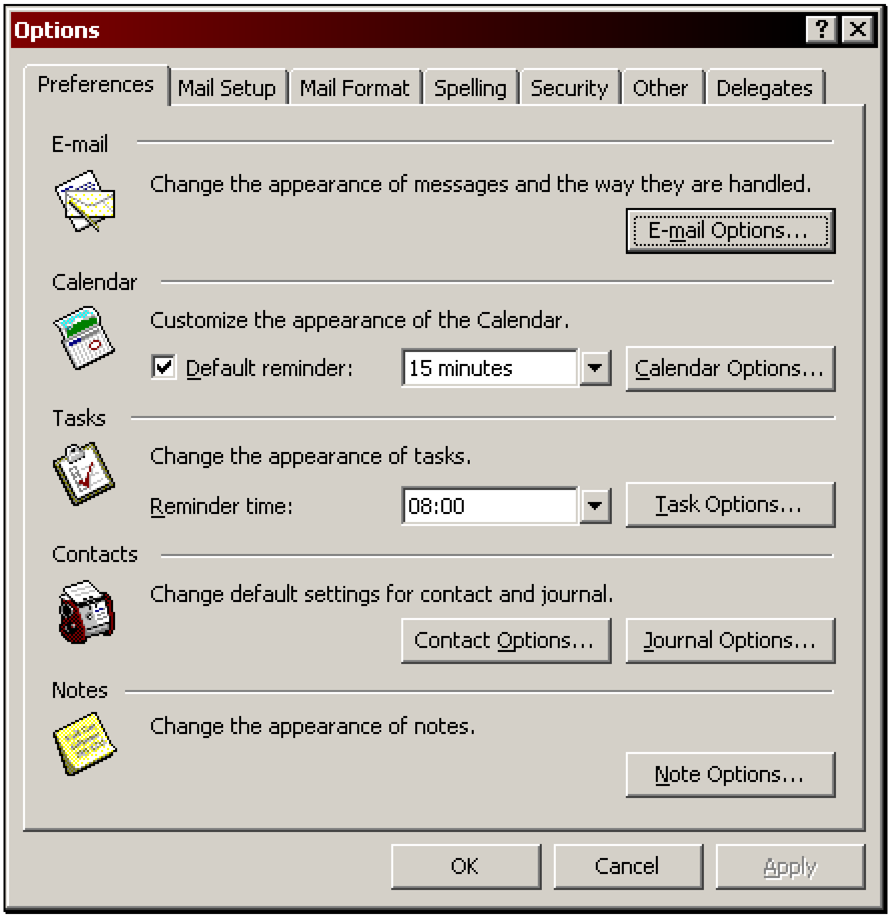
Reminders are a valuable tool when working with calendar, especially if a calendar has numerous appointments and meetings. Outlook can be configured so that all appointments, meetings, and events have a default reminder set when creating an item. This saves time when creating the item.

This setting is the default that will be applied to a calendar item when it is created. During the creation process, or at any time, the reminder for an item can be turned on or off, and/or the time can be changed.

Additionally, the reminders have two advanced options to control what happens when they come due.

Procedure: (To set the default reminder)

1. Select the **Tools** menu and choose **Options**. The **Options** dialog box displays:


Options
Preferences
Mail Setup
Mail Format
Spelling
Security
Other
Delegates
E-mail
E-mail Options...
Calendar
Calendar Options...
Tasks
Task Options...
Contacts
Contact Options...
Journal Options...
Notes
Note Options...
OK
Cancel
Apply

Change the appearance of messages and the way they are handled.

Customize the appearance of the Calendar.

☑ Default reminder: 15 minutes

Change the appearance of tasks.

Reminder time: 08:00

Change default settings for contact and journal.

Change the appearance of notes.

2. In the **Calendar** section of the **Preferences** tab, select the **Default reminder** check box to enable reminders to be on by default when creating an appointment, event, or meeting. Clear this check box to turn off default reminders.

3. In the drop-down list, select the amount of time prior to the start of an item that the reminder should appear, or type a time amount in the box.

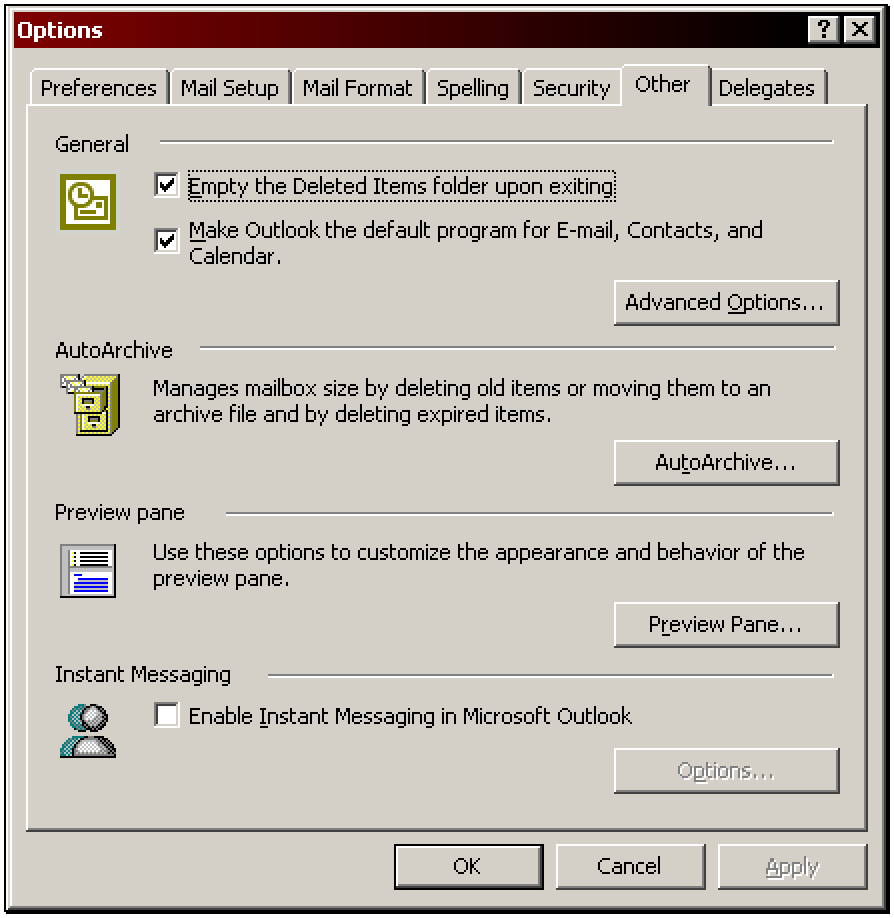
4. Click **OK** when completed.

Tip:

- When creating an item that occurs in the past, the reminder will be cleared and dimmed, regardless of the default setting.

Procedure: (To set advanced reminder options)

1. Select the **Tools** menu and choose **Options**. The **Options** dialog box displays.
2. Select the **Other** tab.


Options
Preferences
Mail Setup
Mail Format
Spelling
Security
Other
Delegates
General
Advanced Options...
AutoArchive
AutoArchive...
Preview pane
Preview Pane...
Instant Messaging
Options...
OK
Cancel
Apply

☑ Empty the Deleted Items folder upon exiting

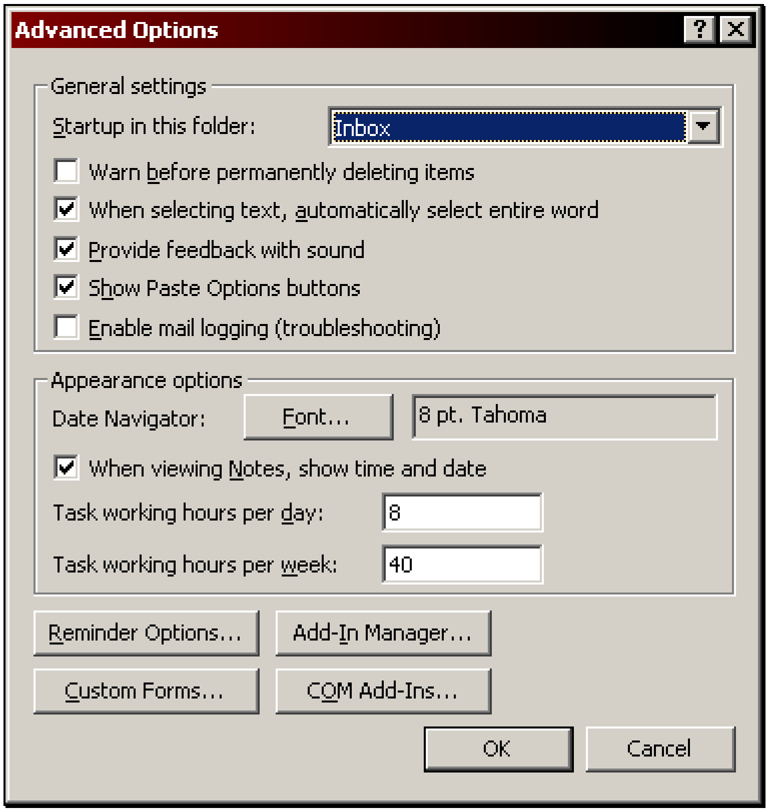
☑ Make Outlook the default program for E-mail, Contacts, and Calendar.

Manages mailbox size by deleting old items or moving them to an archive file and by deleting expired items.

Use these options to customize the appearance and behavior of the preview pane.

☐ Enable Instant Messaging in Microsoft Outlook

3. Click **Advanced Options**. The **Advanced Options** dialog box displays:



Advanced Options

General settings

Startup in this folder: Inbox

☐ Warn before permanently deleting items
☑ When selecting text, automatically select entire word
☑ Provide feedback with sound
☑ Show Paste Options buttons
☐ Enable mail logging (troubleshooting)

Appearance options

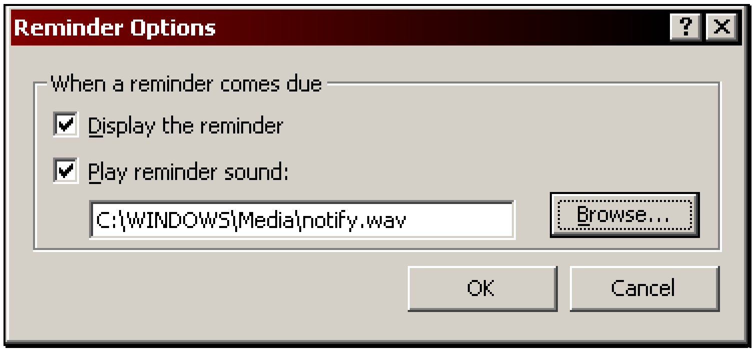
Date Navigator: 8 pt. Tahoma

☑ When viewing Notes, show time and date

Task working hours per day: 8

Task working hours per week: 40

4. Click **Reminder Options**. The **Reminder Options** dialog box displays:



Reminder Options

When a reminder comes due

☑ Display the reminder
☑ Play reminder sound:

C:\WINDOWS\Media\notify.wav

5. Select the **Display the reminder** check box to have Outlook display the **Reminders** window when reminders come due. Clear this check box to prevent the window from displaying.

6. To have Outlook play a sound when a **Reminder** window displays, select the **Play reminder sound** check box and click **Browse** to select a sound file. Clear this check box to turn off the sound.

7. Click **OK** to confirm the changes and close each dialog box when completed.

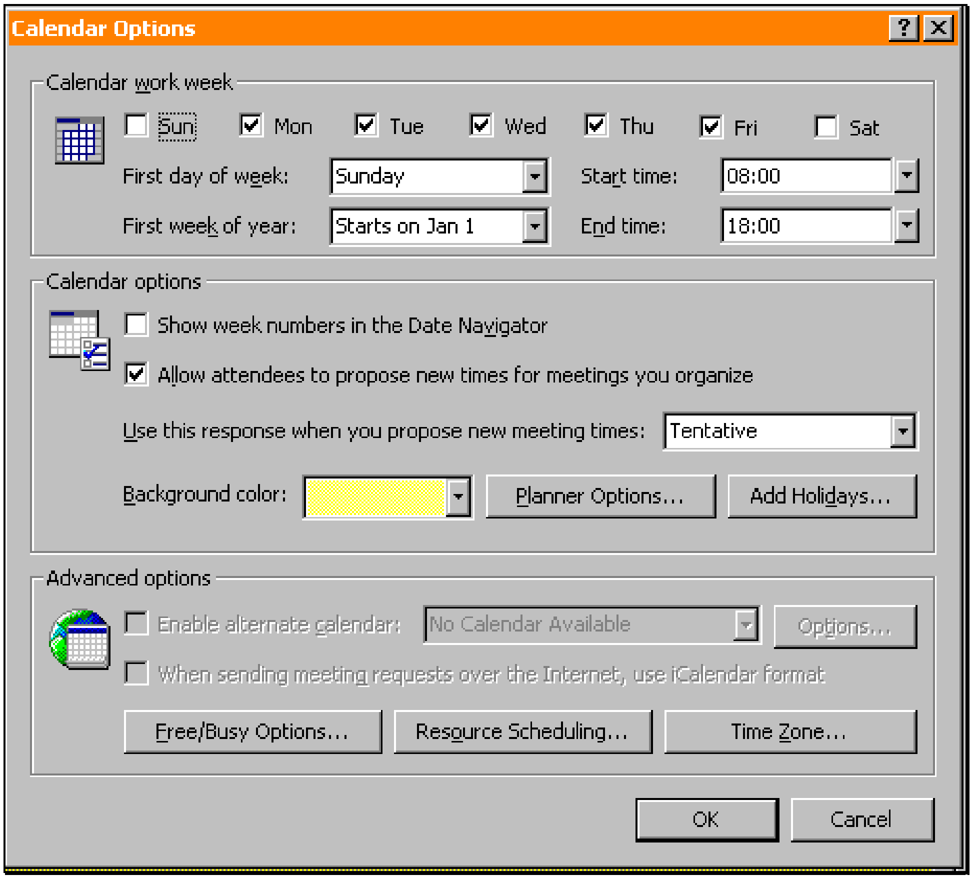
Setting Calendar Options

The following procedure and table give a general description of the options available for configuring the calendar found in the **Tools**, **Options** menu. Further procedures in this chapter will go into more detail regarding several of the options found here.

Procedure:

1. Select the **Tools** menu and choose **Options**. The **Options** dialog box displays.

2. Click **Calendar Options**. The **Calendar Options** dialog box displays:



Calendar Options

Calendar work week

☐ Sun ☑ Mon ☑ Tue ☑ Wed ☑ Thu ☑ Fri ☐ Sat

First day of week: Sunday

Start time: 08:00

First week of year: Starts on Jan 1

End time: 18:00

Calendar options

☐ Show week numbers in the Date Navigator

☑ Allow attendees to propose new times for meetings you organize

Use this response when you propose new meeting times: Tentative

Background color:

Advanced options

☐ Enable alternate calendar: No Calendar Available

☐ When sending meeting requests over the Internet, use iCalendar format

3. Use the following table to set the options for the calendar:

Option	Description
Calendar Work Week	
Days of the week check boxes	Select or clear the check boxes to specify which days of the week are work days.
First day of week	Use the drop-down list to choose which day begins the work week.
First week of year	Use the drop-down list to select the first week of the calendar year. This option can be used for setting a calendar to correspond with a fiscal year, or other non-traditional calendars.
Start and End time	Specify the start time and end time of the work day. These drop-down lists change the appearance of the calendar notepad and the user's availability for meetings.
Calendar options	
Show week numbers in the Date Navigator	Allows the user to display week numbers (1 through 52) in the Date Navigator.
Allow attendees to propose new times for meetings you organize	Allows meeting attendees the option to propose new times for meetings organized by the user. This setting can be changed in individual meeting requests.
Use this response when you propose new meeting times.	Select from this drop-down to indicate what type of response should be made when proposing a new meeting time.
Background color	Select from this drop-down a color for the calendar notepad background for working hours.
Planner Options*	Displays the planner options dialog box which controls options in the Meeting Planner and Group Schedules.
Add Holidays*	Allows the user to add events to their calendar from over 1,000 holidays from around the world.

Option	Description
Advanced options	
Enable alternate calendar	Used to view and set options of calendar systems other than the Roman calendar.
When sending meeting requests over the Internet, use iCalendar format.	Specifies that Outlook should always use the iCalendar format when scheduling meetings with users over the Internet. Can only be enabled when an Internet-based (POP3, IMAP, SMTP) e-mail account is added to Outlook.
Free/Busy Options*	Sets the options for how much of the user's calendar is published to the server, and how often that information is uploaded to the server. Also controls internet free/busy publishing options.
Resource Scheduling*	Allows Outlook to automatically accept or decline meeting requests for the user depending on availability.
Time Zone*	Allows the user to view an additional time zone in the Time Bar, as well as change time zones. This is helpful for travelers or conference calls between different time zones. Also allows user to perform a time zone swap and set whether DST is observed.

4. Choose the desired options and click **OK** to accept.
5. Click **OK** to close the **Options** dialog box.

Tip:

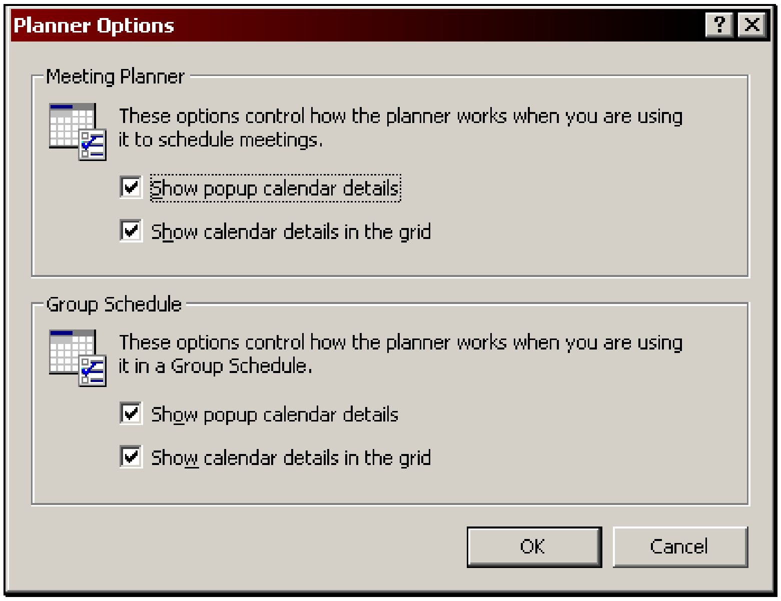
- The options marked with an asterisk (*) have further information and procedures in this chapter.

Setting the Planning Grid Options

As described in previous chapters, meetings and group schedules use an improved planning grid for viewing other users' calendars and coordinating meetings. The following options control how much information is displayed in the planning grid. These options will only display information if at least read permission has been granted to the user for that calendar.

Procedure:

1. In the **Calendar Options** dialog box, click **Planner Options**. The **Planner Options** dialog box displays:



These options control how the planner works when you are using it to schedule meetings.

☑ Show popup calendar details

☑ Show calendar details in the grid

These options control how the planner works when you are using it in a Group Schedule.

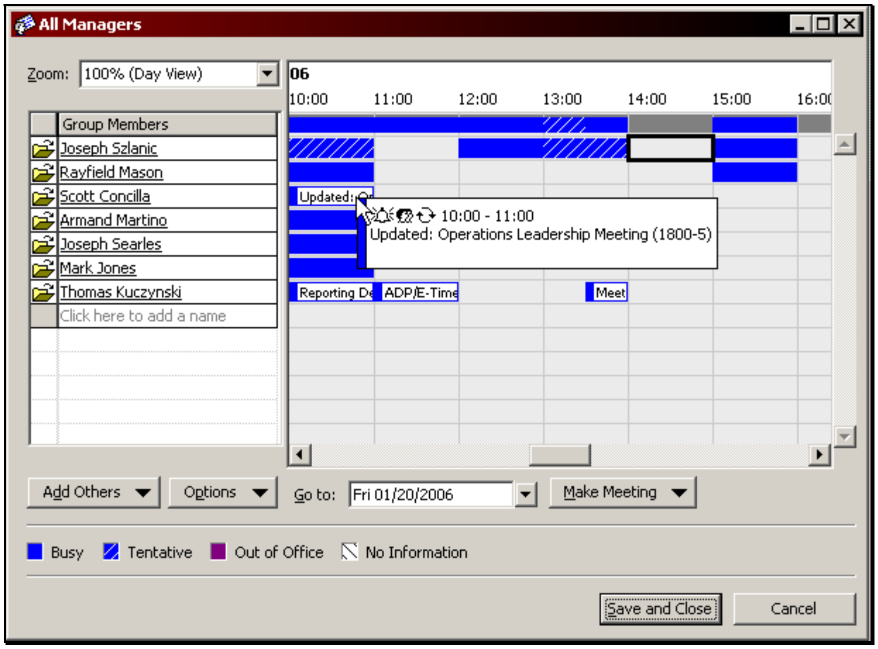
☑ Show popup calendar details

☑ Show calendar details in the grid

2. In the **Meeting Planner** and **Group Schedule** sections, select or clear the following check boxes:

Option	Description
Show popup calendar details	Displays a popup box over the selected item in the calendar grid with details of the item.
Show calendar details in the grid	Displays details of appointments and meetings in the planning grid instead of solid bars. Can also be controlled on an individual basis by the **Options** down-down menu in the **Meeting Planner** window.

3. Click **OK** to confirm the changes and close each dialog box when completed.


All Managers
Zoom:
06
10:00
11:00
12:00
13:00
14:00
15:00
16:0
Group Members
Updated:
Reporting De
ADP/E-Time
Meet
Add Others
Options
Go to:
Make Meeting
Busy
Tentative
Out of Office
No Information
Save and Close
Cancel

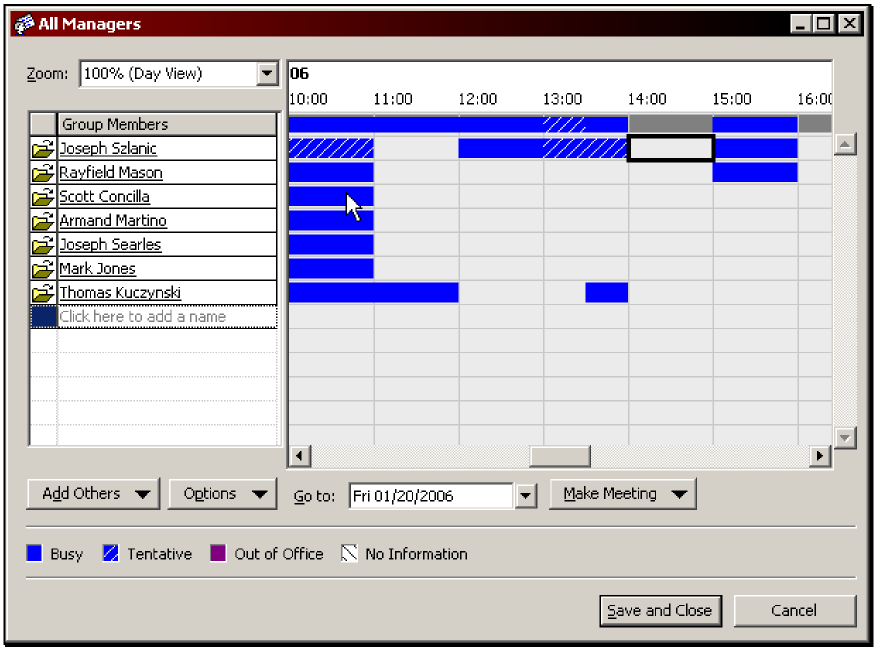
Zoom: 100% (Day View)

Joseph Szlanic
Rayfield Mason
Scott Concilla
Armand Martino
Joseph Searles
Mark Jones
Thomas Kuczynski
Click here to add a name

10:00 - 11:00
Updated: Operations Leadership Meeting (1800-5)

Go to: Fri 01/20/2006

Planning grid with both options enabled.


All Managers
Zoom:
06
10:00
11:00
12:00
13:00
14:00
15:00
16:0
Group Members
Add Others
Options
Go to:
Make Meeting
Busy
Tentative
Out of Office
No Information
Save and Close
Cancel

Zoom: 100% (Day View)

Joseph Szlanic
Rayfield Mason
Scott Concilla
Armand Martino
Joseph Searles
Mark Jones
Thomas Kuczynski
Click here to add a name

Go to: Fri 01/20/2006

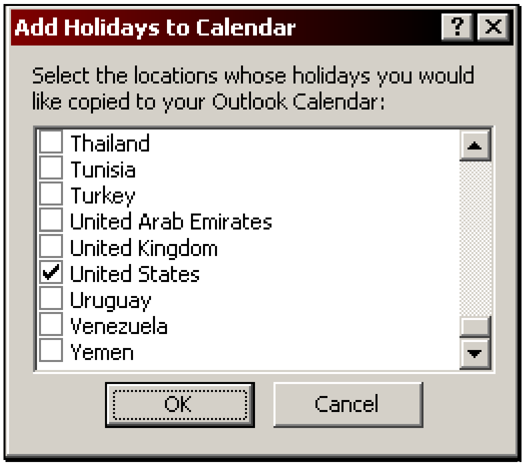
Planning grid with both options disabled.

Adding Holidays as Events

Outlook has the ability to automatically add holidays to the calendar as events. Using this feature holidays are scheduled as single-occurring events, not annually recurring events.

Procedure:

1. In the **Calendar Options** dialog box, click **Add Holidays**. The **Add Holidays to Calendar** dialog box displays:



Add Holidays to Calendar

Select the locations whose holidays you would like copied to your Outlook Calendar:

☐ Thailand
☐ Tunisia
☐ Turkey
☐ United Arab Emirates
☐ United Kingdom
☑ United States
☐ Uruguay
☐ Venezuela
☐ Yemen

2. Select the check boxes of the countries whose holidays should be added.

3. Click **OK**. Outlook adds the holidays to the calendar.

Warning:

- The holiday list that is part of Outlook XP only contains holidays through the end of 2005. In order to use this feature to add holidays for 2006 and beyond, an update must be downloaded from Microsoft. Check Microsoft's support website – http://support.microsoft.com - for more information.

- This process only needs to be done once. If repeated, the holidays will be added again to all dates.

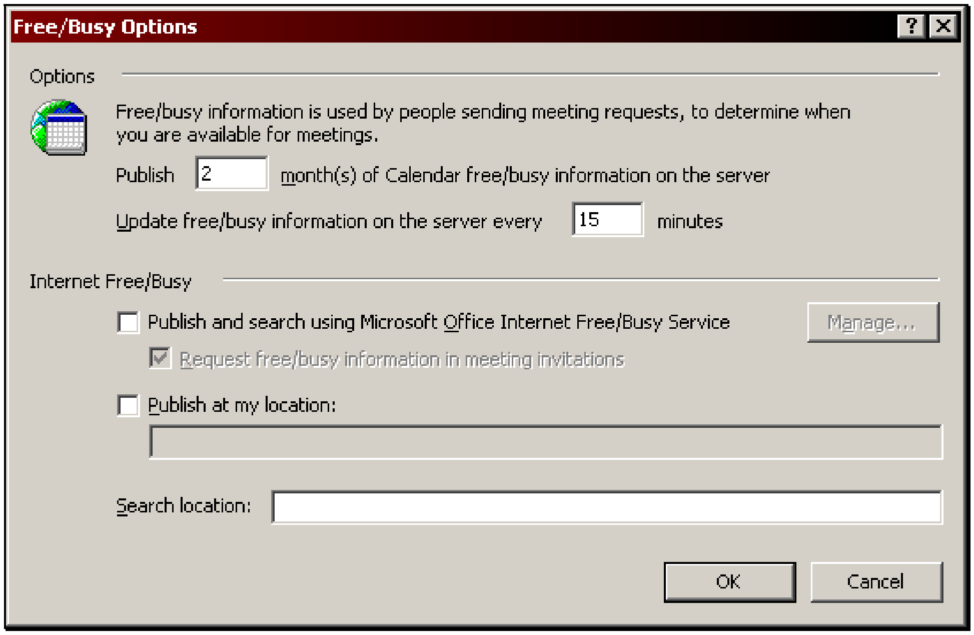
Setting Free and Busy Options

The following options control how many months of a user's calendar is made publicly available for scheduling meetings, and how often calendar information is updated with the server.

This is not the same as granting read permission to a calendar. Any user can view other users' calendars to see if they are available for meetings, however, they will not be able to see any details or specifics of appointments or meetings unless read permission has been granted.

Procedure:

1. In the **Calendar Options** dialog box, click **Free/Busy Options**. The **Free/Busy Options** dialog box displays:



Free/busy information is used by people sending meeting requests, to determine when you are available for meetings.

Publish 2 month(s) of Calendar free/busy information on the server

Update free/busy information on the server every 15 minutes

☐ Publish and search using Microsoft Office Internet Free/Busy Service

☑ Request free/busy information in meeting invitations

☐ Publish at my location:

Search location:

2. In the **Publish** box, type the number of months of information that should be available to other users in the planning grid.
3. In the **Update** box, type how often calendar information should be updated with the server.
4. Click **OK** to confirm the changes and close each dialog box when completed.

Tip:

- To have no information available on the server, enter **0** (zero) months in the **Publish** box. However, this is not recommended, as it will make it impossible for others to view your availability.

Warning:

- It is not recommended to change the **Update** setting beyond the range of 10 to 30 minutes. Setting too low of a value will cause increased network traffic. Setting too high of a value will cause other users to see outdated information.
- The **Microsoft Office Internet Free/Busy Service** is no longer supported by Microsoft. Visit Microsoft's support website for more information on alternative methods of sharing this information with non-local users.

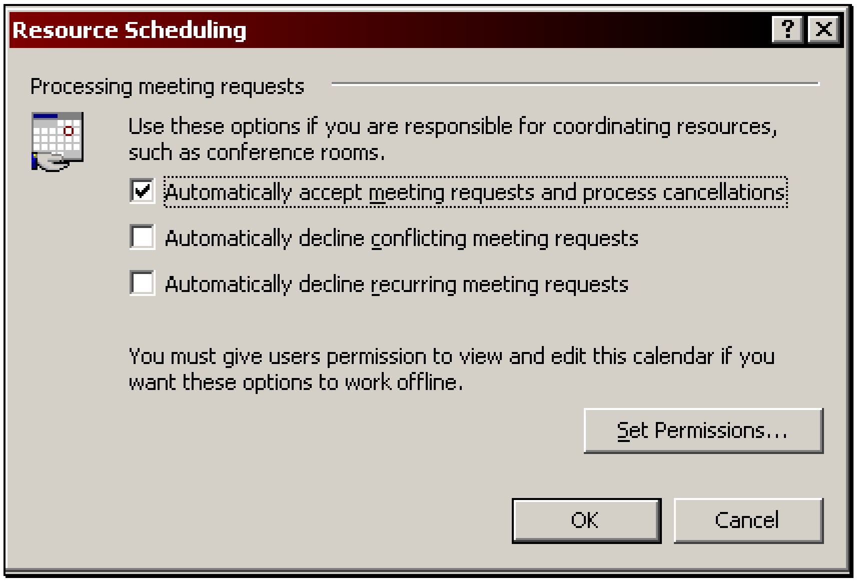
Processing Meeting Requests Automatically

The Inbox and Calendar can be configured to automatically handle meeting requests as they are received. These options are ideal for resource calendars such as conference rooms, but can be enabled by any user to help manage meeting requests.

Additionally, a user can control what happens to a meeting request in the Inbox once it is processed.

Procedure: (To set automatic processing)

1. In the **Calendar Options** dialog box, click **Resource Scheduling**. The **Resource Scheduling** dialog box displays:



Resource Scheduling

Processing meeting requests

Use these options if you are responsible for coordinating resources, such as conference rooms.

☑ Automatically accept meeting requests and process cancellations

☐ Automatically decline conflicting meeting requests

☐ Automatically decline recurring meeting requests

You must give users permission to view and edit this calendar if you want these options to work offline.

2. Select or clear the **Automatically accept meeting requests and process cancellations** check box. If selected, the following two check boxes will be enabled. Select or clear these check boxes as desired.

3. Click **OK** to confirm the changes and close each dialog box when completed.

Tip:

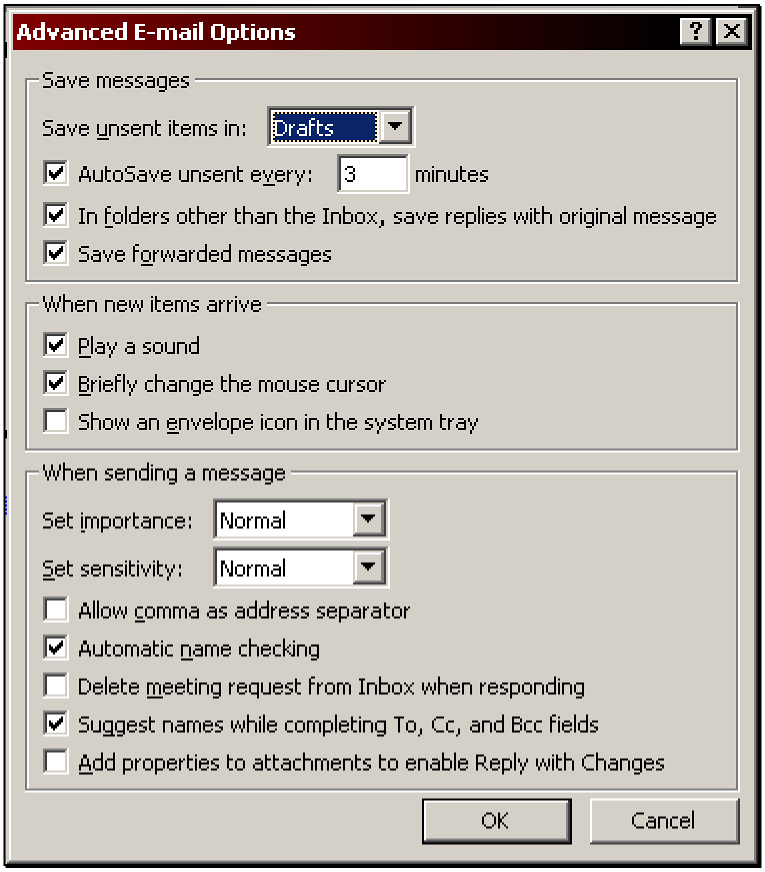
- The **Set Permissions** option is not needed in a network environment.

Procedure: (To change how meeting requests are handled in the Inbox)

1. Select the **Tools** menu and choose **Options**. The **Options** dialog box displays.

2. Click **E-mail Options**. The **E-mail Options** window displays.

3. Click **Advanced E-mail Options**. The **Advanced E-mail Options** window displays:



Advanced E-mail Options

Save messages

Save unsent items in: Drafts

☑ AutoSave unsent every: 3 minutes

☑ In folders other than the Inbox, save replies with original message

☑ Save forwarded messages

When new items arrive

☑ Play a sound

☑ Briefly change the mouse cursor

☐ Show an envelope icon in the system tray

When sending a message

Set importance: Normal

Set sensitivity: Normal

☐ Allow comma as address separator

☑ Automatic name checking

☐ Delete meeting request from Inbox when responding

☑ Suggest names while completing To, Cc, and Bcc fields

☐ Add properties to attachments to enable Reply with Changes

4. In the **When sending a message** section, select or clear the **Delete meeting request from Inbox when responding** check box. Selecting this check box will cause meeting requests to be deleted automatically once they have been responded to. Clearing the check box will keep the meeting request e-mail in the Inbox until it is deleted by the user.

5. Click **OK** to confirm the changes and close each dialog box when completed.

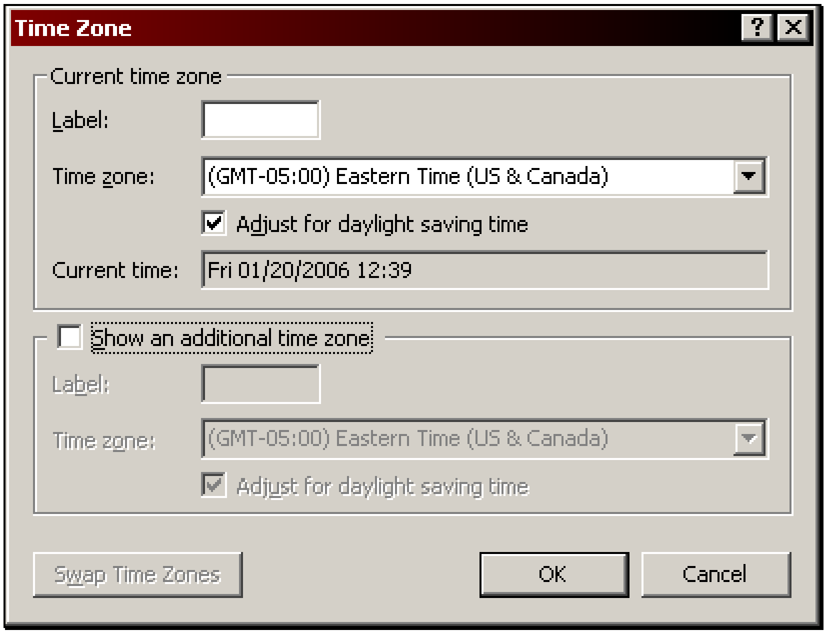
Setting Time Zone Options

Outlook offers a great deal of flexibility when it comes to time zones on the calendar. Time zones can be changed easily, as well as a second time zone can be added to the calendar.

For instance, a project manager who deals with a consultant in a different time zone would be able to quickly reference the calendar with both time zones to simplify scheduling.

Procedure:

1. In the **Calendar Options** dialog box, click **Time Zone**. The **Time Zone** dialog box displays:



Label:

Time zone: (GMT-05:00) Eastern Time (US & Canada)

☑ Adjust for daylight saving time

Current time: Fri 01/20/2006 12:39

☐ Show an additional time zone

Label:

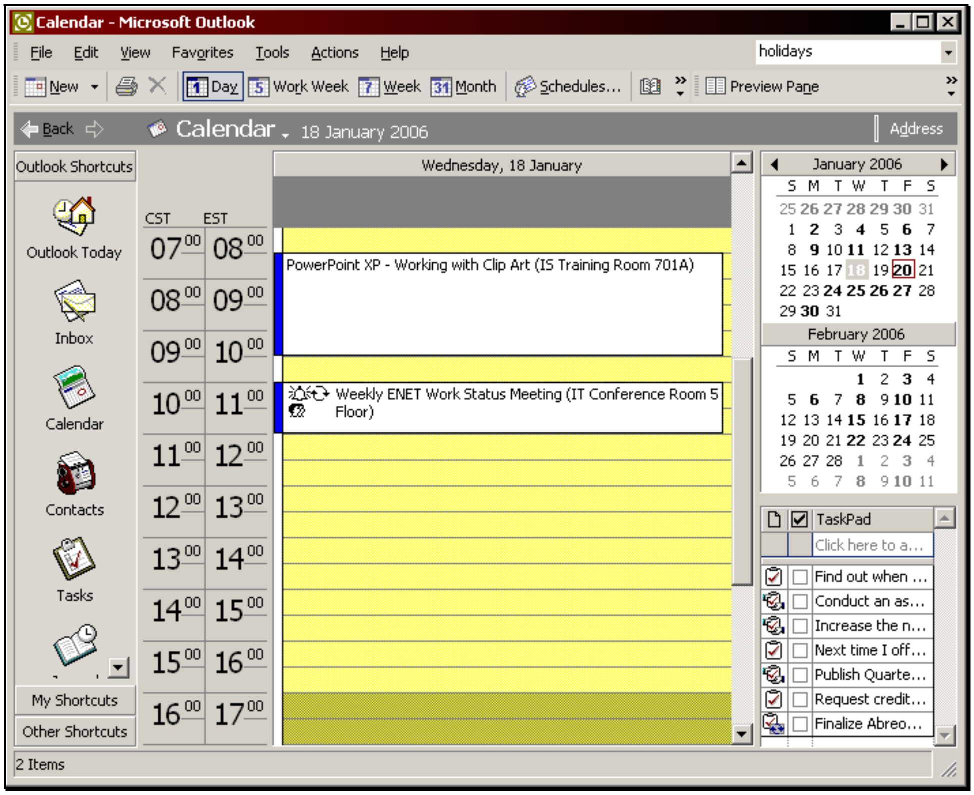
Time zone: (GMT-05:00) Eastern Time (US & Canada)

☑ Adjust for daylight saving time

2. Use the following table to select and set options:

Option	Description
Label	Type a text label for the selected time zone. This can be the time zone abbreviation such as EST or PST, or it can be a description, such as “Manager” or “Consultant”. It should be kept short as the Time Bar can only display a limited number of characters.
Time Zone	Use this drop-down list to select a time zone.
Adjust for daylight saving time	Select or clear this check box to indicate whether daylight saving time is observed within the selected time zone.
Current time	This is the current date and time as determined by the workstation. It cannot be changed in this dialog box. Use the clock icon in the Windows system tray, or the **Date and Time** icon in the Windows Control Panel to make changes.
Show an additional time zone	Select this check box to enable the display of a second time zone and set its options.
Swap Time Zones	If two time zones are enabled, this option will swap their positions on the Time Bar as well as swap their positions in the dialog box.

3. Click **OK** to confirm the changes and close each dialog box when completed.


Calendar - Microsoft Outlook
File Edit View Favorites Tools Actions Help
holidays
New Day Work Week Week Month Schedules... Preview Pane
Back Calendar 18 January 2006 Address
Outlook Shortcuts
Outlook Today
Inbox
Calendar
Contacts
Tasks
My Shortcuts
Other Shortcuts
CST EST
Wednesday, 18 January
PowerPoint XP - Working with Clip Art (IS Training Room 701A)
Weekly ENET Work Status Meeting (IT Conference Room 5 Floor)
January 2006
February 2006
TaskPad
Click here to a...
Find out when ...
Conduct an as...
Increase the n...
Next time I off...
Publish Quarte...
Request credit...
Finalize Abreo...
2 Items

Calendar with two time zones displayed.

Warning:

- Changing the first time zone has the same effect as changing the time zone in the **Date and Time** icon in the Windows Control Panel.
- When changing the time zone, the time of appointments and meetings adjusts as well. Appointments will stay at their scheduled time in the original time zone but will move to the appropriate time in the new time zone. For example, an appointment scheduled for 10:00 a.m. in the GMT-5 time zone (Eastern Standard Time) will move to 9:00 a.m. if the time zone is changed to GMT-6 (Central Standard Time). Appointments are scheduled in absolute time by Outlook, regardless of the time zone.

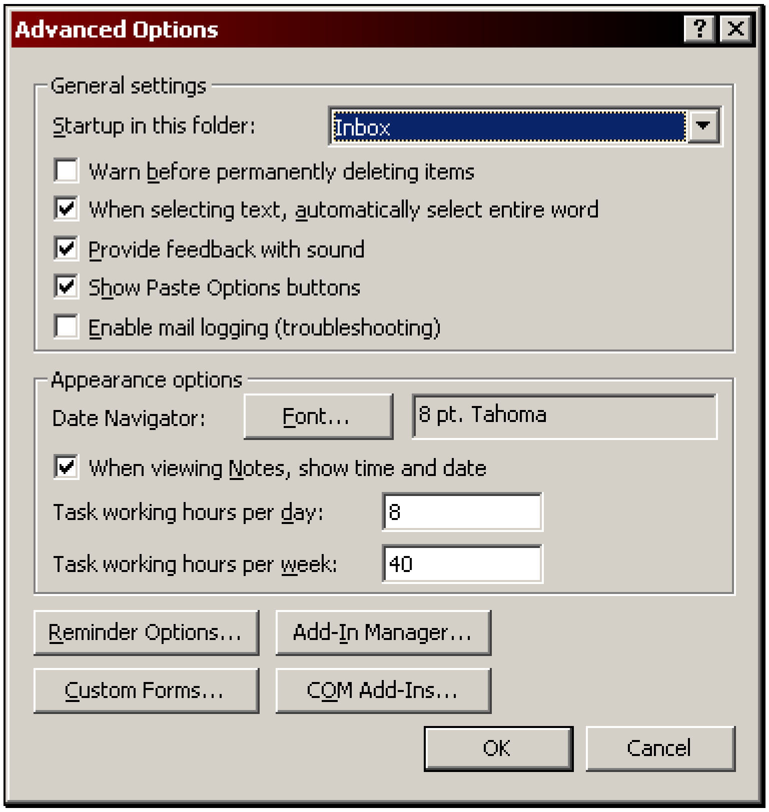
Changing the Date Navigator Font

The **Date Navigator**, located in the upper-right corner of most calendar-based views, allows easy selection of any date in the calendar. One of the options that can be changed for the Date Navigator is the font and font size that are used in the display.

The option for how dates with items appear in the Date Navigator are discussed in the view options topic later in this chapter.

Procedure:

1. Select the **Tools** menu and choose **Options**. The **Options** dialog box displays.
2. Select the **Other** tab.
3. Click **Advanced Options**. The **Advanced Options** dialog box displays:


Advanced Options
?
X
General settings
Appearance options
Font...
Reminder Options...
Add-In Manager...
Custom Forms...
COM Add-Ins...
OK
Cancel

Startup in this folder: Inbox

☐ Warn before permanently deleting items
☑ When selecting text, automatically select entire word
☑ Provide feedback with sound
☑ Show Paste Options buttons
☐ Enable mail logging (troubleshooting)

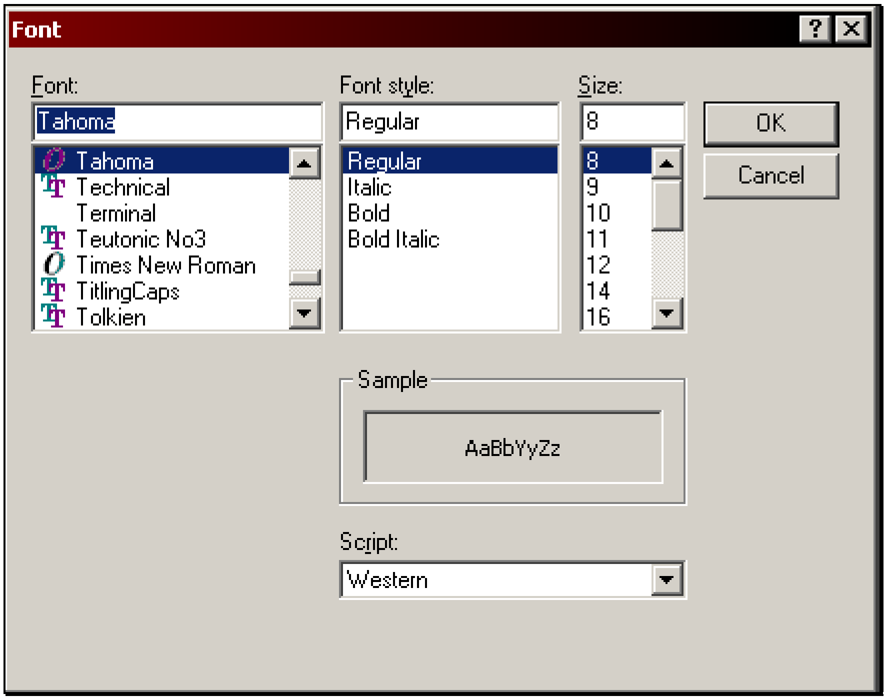
Date Navigator: 8 pt. Tahoma

☑ When viewing Notes, show time and date

Task working hours per day: 8

Task working hours per week: 40

4. In the **Appearance options** section, next to **Date Navigator**, click **Font**. The **Font** dialog box displays:


Font
?
Font:
Tahoma
Tahoma
Technical
Terminal
Teutonic No3
Times New Roman
TitlingCaps
Tolkien
Font style:
Regular
Regular
Italic
Bold
Bold Italic
Size:
8
8
9
10
11
12
14
16
OK
Cancel
Sample
AaBbYyZz
Script:
Western

5. Use the **Font**, **Font style**, and **Size** lists to select a new font. The **Sample** area displays how the selected options will appear.

6. Click **OK** to confirm the changes and close each dialog box when completed.

Tip:

- The Date Navigator font should be kept relatively small (less than 12 points). Larger fonts will make it more difficult to display several months at a time and take up valuable Outlook interface space.

Chapter 9 – Customizing the Calendar

Making Calendar the Default Outlook Folder

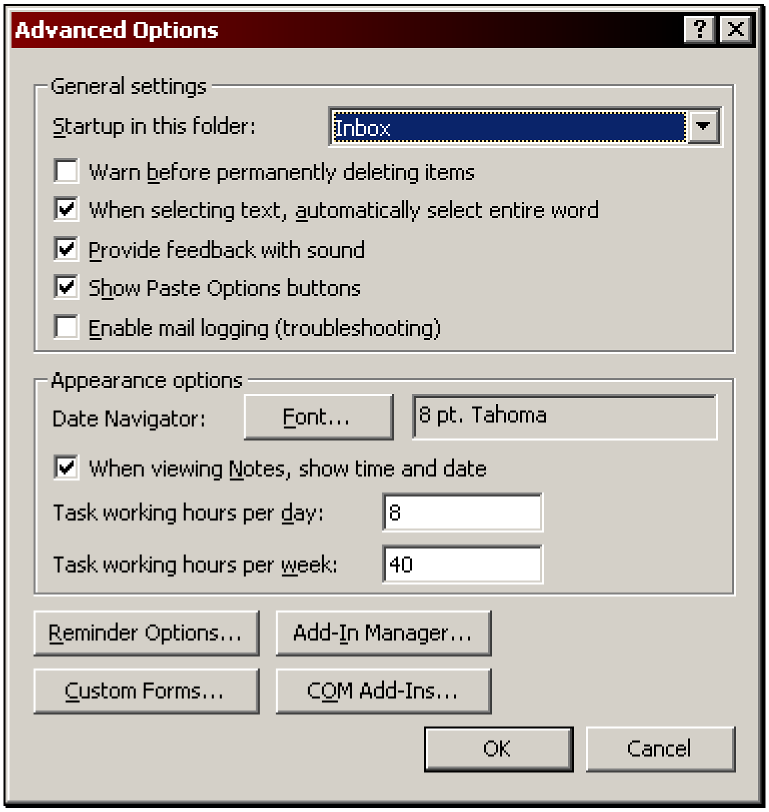
By default, Outlook is configured so that the Inbox is the first folder displayed when the program is started. However, this setting can be changed so that the **Calendar** folder is displayed instead.

Procedure:

1. Select the **Tools** menu and choose **Options**. The **Options** dialog box displays.

2. Select the **Other** tab.

3. Click **Advanced Options**. The **Advanced Options** dialog box displays:



Advanced Options

General settings

Startup in this folder: Inbox

☐ Warn before permanently deleting items

☑ When selecting text, automatically select entire word

☑ Provide feedback with sound

☑ Show Paste Options buttons

☐ Enable mail logging (troubleshooting)

Appearance options

Date Navigator: 8 pt. Tahoma

☑ When viewing Notes, show time and date

Task working hours per day: 8

Task working hours per week: 40

4. From the **Startup in this folder** drop-down list, select **Calendar**.

5. Click **OK** to confirm the changes and close each dialog box when completed.

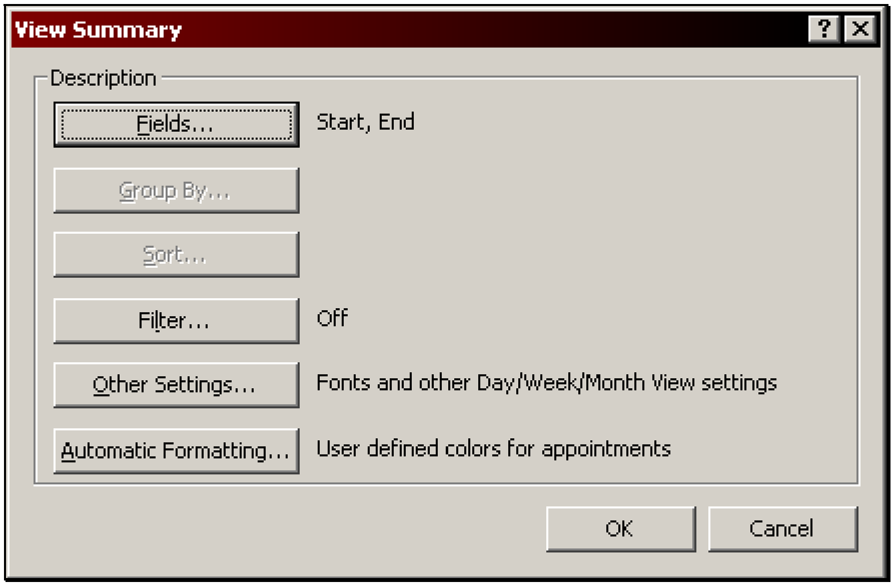
Modifying a Calendar View

Views are a powerful feature of Outlook that allow a user to customize how and what information is displayed in the calendar, as well as all folders of Outlook. **Chapter 1** of this manual explored the built-in views that come with calendar, including the calendar-based and table-based views.

A complete discussion of creating and customizing views is beyond the scope of this course, however, the following procedure and table explores the **Other Settings** view options that can be set by the user when working in a calendar-based view (i.e. the Day/Week/Month views).

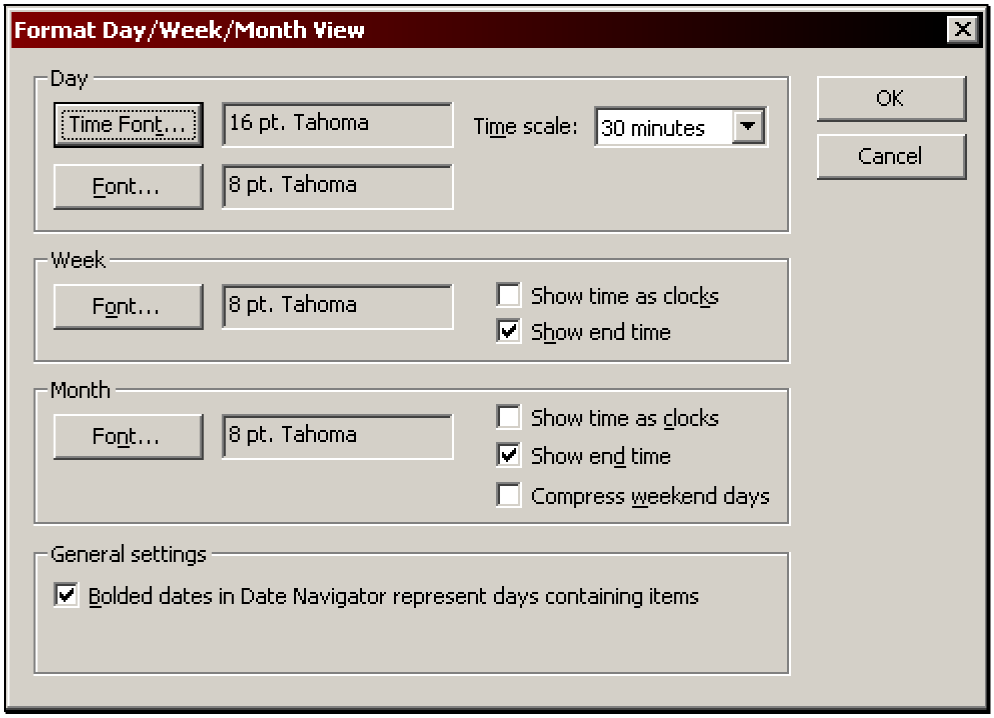
Procedure:

1. Select the **View** menu, choose **Current View**, then **Customize Current View**. The **View Summary** dialog box displays:



Fields...	Start, End
Filter...	Off
Other Settings...	Fonts and other Day/Week/Month View settings
Automatic Formatting...	User defined colors for appointments

2. Click **Other Settings**. The **Format View** dialog box displays:



Day

Time Font... 16 pt. Tahoma

Font... 8 pt. Tahoma

Time scale: 30 minutes

Week

Font... 8 pt. Tahoma

☐ Show time as clocks

☑ Show end time

Month

Font... 8 pt. Tahoma

☐ Show time as clocks

☑ Show end time

☐ Compress weekend days

General settings

☑ Bolded dates in Date Navigator represent days containing items

3. Use the following table to change or set options in this dialog box:

Option	Description
Time Font (Day)	Selects the font for the Time Bar
Font (Day/Week/Month)	Selects the font that calendar items will use in the selected calendar view.
Time scale (Day)	Use this drop-down to select how much time each line/box represents in **Day** view. This is the same setting as described in the **Changing the Time Bar** topic in **Chapter 1**.
Show time as clocks (Week/Month)	If selected for **Week** or **Month** views, the start and end times of appointments and meetings will be displayed as graphical clocks instead of text. The start time clock will have a white background, and the end time clock will be black.
Show end time (Week/Month)	Displays the end time of an appointment or meeting in addition to the start time.

Option	Description
Compress weekend days (Month)	In **Month** view, compresses Saturday and Sunday into a single box on the right side of the calendar to allow more space for weekdays.
Bolded dates in Date Navigator represent days containing items	Select this option to have dates with calendar items with a status (Show time as) of **Busy**, **Out of Office**, or **Tentative** appear in bold print in the **Date Navigator**. Dates with items that are marked as **Free** will not have their dates bolded.

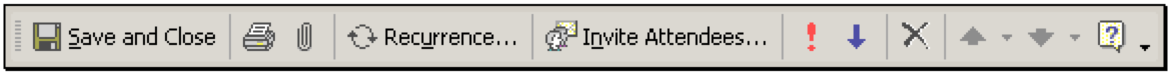
4. Click **OK** when complete.
5. Click **OK** again to close the **View Summary** dialog box and return to the calendar.

Appendix A

Toolbars

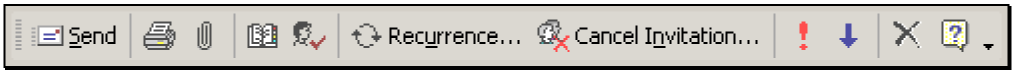
Appointment and Event Toolbar

This toolbar appears on all appointments and events, including those that are recurring. The title bar of windows with this toolbar will display either **Appointment**, **Recurring Appointment**, **Event**, or **Recurring Event**.

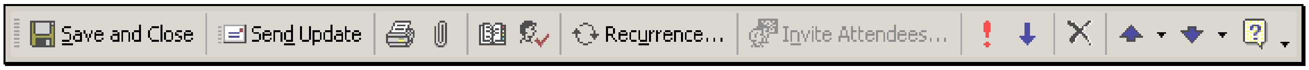

Save and Close
Recurrence...
Invite Attendees...

The Meeting Organizer Toolbars

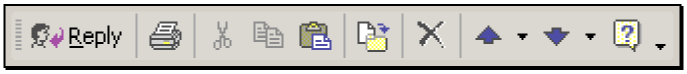
This toolbar appears when a meeting is being organized. The title bar of this window displays **Meeting**.


Send
Recurrence...
Cancel Invitation...

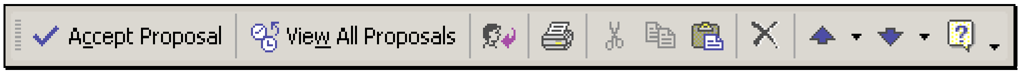
This toolbar appears on a meeting that has already been organized. The title bar of this window displays **Meeting**.


Save and Close
Send Update
Recurrence...
Invite Attendees...

This toolbar appears on a meeting response e-mail to the organizer. The title bar of this window displays **Meeting Response**.



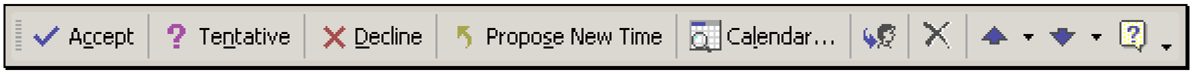
This toolbar appears on a meeting response e-mail to the organizer that has a new time proposal. The title bar of this window displays **Meeting Response**.


Accept Proposal
View All Proposals

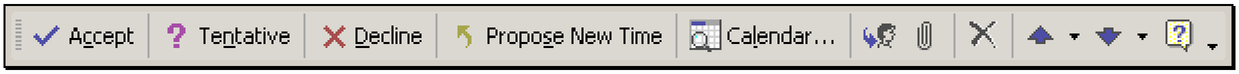
Appendix A – Toolbars

The Meeting Attendee Toolbars

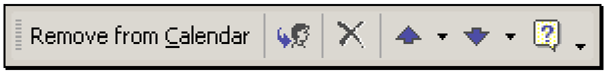
This toolbar appears when a meeting attendee receives a meeting invitation e-mail. The title bar of this window displays **Meeting**.


Accept
Tentative
Decline
Propose New Time
Calendar...

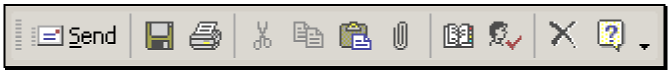
This toolbar appears on a meeting that is in the attendee's calendar. The title bar of this window displays **Meeting**.


Accept
Tentative
Decline
Propose New Time
Calendar...

This toolbar appears on a meeting cancellation notice e-mail. The title bar of this window displays **Meeting**.


Remove from Calendar

This toolbar appears on the response e-mail an attendee sends to the organizer. The title bar of this window displays **Meeting Response**.



Calendar Item Toolbar Buttons

The following table lists alphabetically all of the toolbar buttons found on the calendar item toolbars as shown in this appendix and a description of their function.

Button	Name	Function
✓ Accept	**Accept**	Accepts a meeting invitation sent by the meeting organizer. The meeting is automatically placed on the calendar.
✓ Accept Proposal	**Accept Proposal**	Accepts the meeting attendee's new time and date proposal for a meeting.
📖	**Address Book**	Opens the Outlook address book.
Calendar...	**Calendar**	Opens the user's calendar.
Cancel Invitation...	**Cancel Invitation**	Converts a meeting window into an appointment window when the item is being created.
✓	**Check Names**	Validates the names in the **To** field against the Global Address List.
📋	**Copy**	Copies the selected item to the clipboard.
✂	**Cut**	Deletes the selected item from its original location and copies it to the clipboard.
✕ Decline	**Decline**	Declines the meeting invitation sent by the meeting organizer. The meeting is not placed on the calendar.
✕	**Delete**	Deletes the selected item. (The item is moved to the Deleted Items folder.)
➥	**Forward**	Opens an e-mail window allowing the user to forward the item to another user.
?	**Help**	Opens the online help system.

Appendix A – Toolbars

Button	Name	Function
!	**Importance: High**	Sets the importance of the item to high.
↓	**Importance: Low**	Sets the importance of the item to low.
📎	**Insert File**	Allows the user to attach documents to the calendar item. The icons will be placed in the message area.
Invite Attendees...	**Invite Attendees**	Converts an appointment window into a meeting window when the item is being created.
📁	**Move to Folder**	Opens a submenu to place the item in a different Outlook folder.
▼ ▾	**Next Item**	In a table-style view, opens the next item in the list. In a calendar-style view, opens the next item on the currently selected day or closes the window if there are no other items.
📋	**Paste**	Copies the item from the clipboard to the currently selected date and time.
▲ ▾	**Previous Item**	In a table-style view, opens the previous item in the list. In a calendar-style view, opens the next item on the currently selected day or closes the window if there are no other items.
🖨	**Print**	Creates a hard copy of the currently selected item.
Propose New Time	**Propose New Time**	Allows a meeting attendee to propose a different date and/or time for a meeting they have been invited to.
Recurrence...	**Recurrence**	Opens the **Recurrence** window to set the repetition pattern for the item.

Button	Name	Function
Remove from Calendar	**Remove from Calendar**	Removes the related item from the calendar.
Reply or	**Reply**	Creates an e-mail reply window.
💾	**Save**	Saves the item to the **Drafts** folder.
💾 Save and Close	**Save and Close**	Saves changes to the item and closes the item window.
Send	**Send**	Sends the item to the chosen recipients.
Send Update	**Send Update**	Sends an update e-mail to meeting attendees when changes have been made to the meeting.
? Tentative	**Tentative**	Provisionally accepts a meeting invitation sent by the meeting organizer. The meeting is automatically placed on the calendar and marked as Tentative.
View All Proposals	**View All Proposals**	Opens the **Meeting** window so that the meeting organizer can view all of the new time proposals that have been received.

Appendix B

Symbols and Icons

Appendix B – Symbols and Icons

The following tables list the symbols and icons that appear in the calendar and on calendar-related e-mails.

Icons in Calendar Views

Symbol	Description
👥	A meeting.
↻	The item is recurring.
↻̸	An exception to recurrence pattern.
🔔	The item has a reminder set.
🔑	The item is marked as private.
🕛	The start time of an appointment or meeting.
●	The end time of an appointment or meeting.

Icons in Table Views

Symbol	Description
📅	An appointment or event.
📅↻	A recurring appointment or event.
👥	A meeting.
👥↻	A recurring meeting.
📎	A item with an attachment.

Appendix B – Symbols and Icons

Calendar-Related E-Mail Icons

Symbol	Description
✉	A meeting request.
✓	An accepted meeting request.
?	A meeting that has been tentatively accepted or a new time proposal for a meeting.
✗	A declined meeting request.
✗	A cancelled meeting notice.

Calendar Folder Icons

Symbol	Description
📅	The shortcut bar calendar icon.
📅	The folder list calendar icon.

Appendix C

Keyboard Shortcuts

Appendix C – Keyboard Shortcuts

The following is a list of keyboard shortcuts for working in the calendar. It is not a comprehensive list of Outlook keyboard shortcuts, but rather, a list of shortcuts that are most relative to working in the calendar.

Action	Keyboard Shortcut
Create an appointment	Ctrl+Shift+A
Create a meeting request	Ctrl+Shift+Q
View from 1 to 9 days	Alt+number of days
View 10 days	Alt+0 (zero)
Switch to weeks	Alt+- (hyphen)
Switch to months	Alt+= (equal sign)
Select next appointment	Tab
Select previous appointment	Shift+Tab
Go to previous day	Left arrow
Go to next day	Right arrow
Go to same day in following week	Alt+Down arrow
Go to same day in previous week	Alt+Up arrow
Modify length of time in selected block	Shift+arrow
In Day view, select time that begins work day	Home
In Day view, select time that ends work day	End
In Day view, select previous block of time	Up arrow
In Day view, select next block of time	Down arrow
In Day view, select block of time at top of screen	Page Up
In Day view, select block of time at bottom of screen	Page Down
In Day view, extend or reduce selected time	Shift+Up or Down arrow

Appendix C – Keyboard Shortcuts

Action	Keyboard Shortcut
In Day view, move appointment when cursor is in the appointment	Alt+Up or Down arrow
In Day view, change appointment start or end time when cursor is in the appointment	Alt+Shift+Up or Down arrow
In Week or Month views, go to first day of week	Home
In Week or Month views, go to last day of week	End
In Week view, go to same day in previous week	Page Up
In Month view, go to same day 5 weeks previous	Page Up
In Week view, go to same day in following week	Page Down
In Month view, go to same day 5 weeks in the future	Page Down
In Week or Month views, move appointment up	Alt+Up arrow
In Week or Month views, move appointment down	Alt+Down arrow
In Date Navigator, go to first day of current week	Alt+Home
In Date Navigator, go to last day of current week	Alt+End
In Date Navigator, go to same day in previous week	Alt+Up arrow
In Date Navigator, go to same day in next week	Alt+Down arrow
In Date Navigator, go to first day of month	Alt+Page Up
In Date Navigator, go to last day of month	Alt+Page Down

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