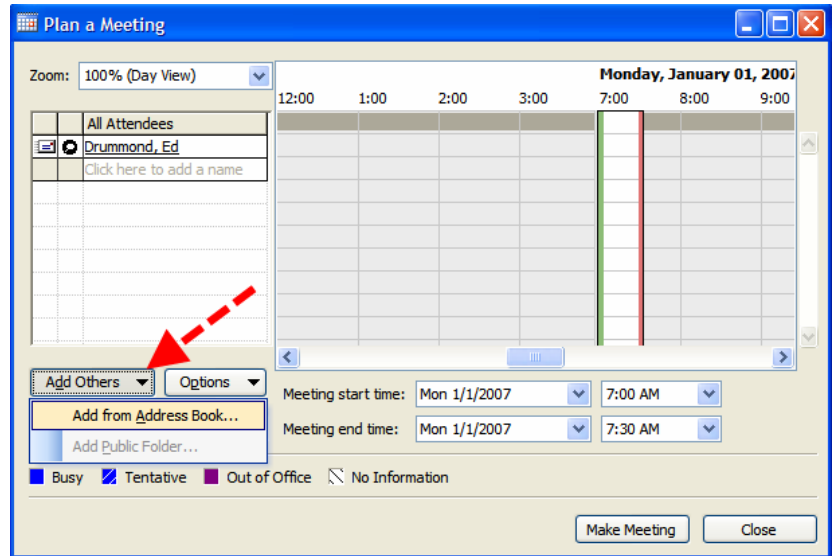


## Planning and Scheduling a Meeting in Exchange Using Outlook 2003

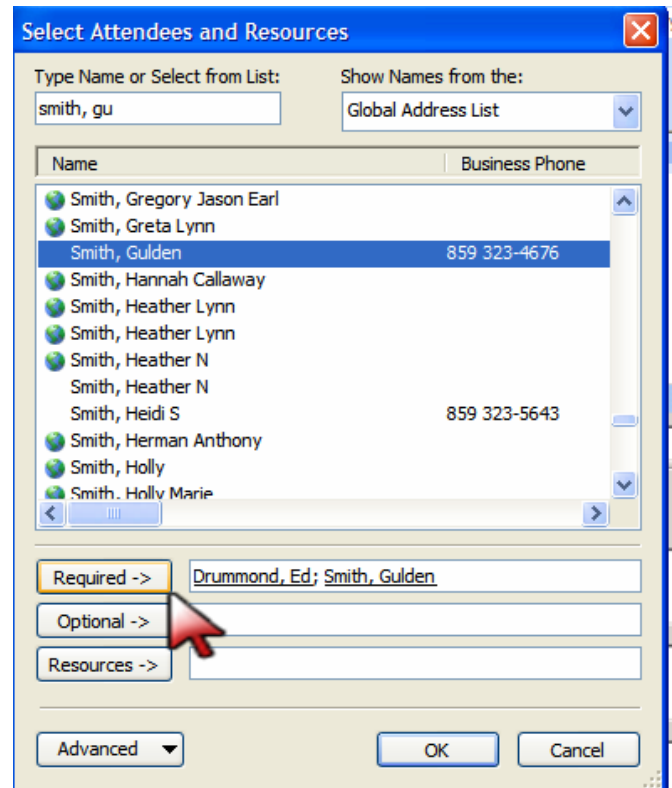
There are several ways to do this in Outlook, but this document will focus on one way.

1. Login to your Exchange e-mail account by using the Microsoft Outlook program on your office computer.
2. Go to your Calendar folder.
3. From the menu bar, click on **Actions** and **Plan a Meeting**.
4. The **Plan a Meeting** window opens.
5. To look at others Exchange e-mail calendars, click on the drop down arrow on the **Add Others** button.
6. Click on **Add from Address Book**.



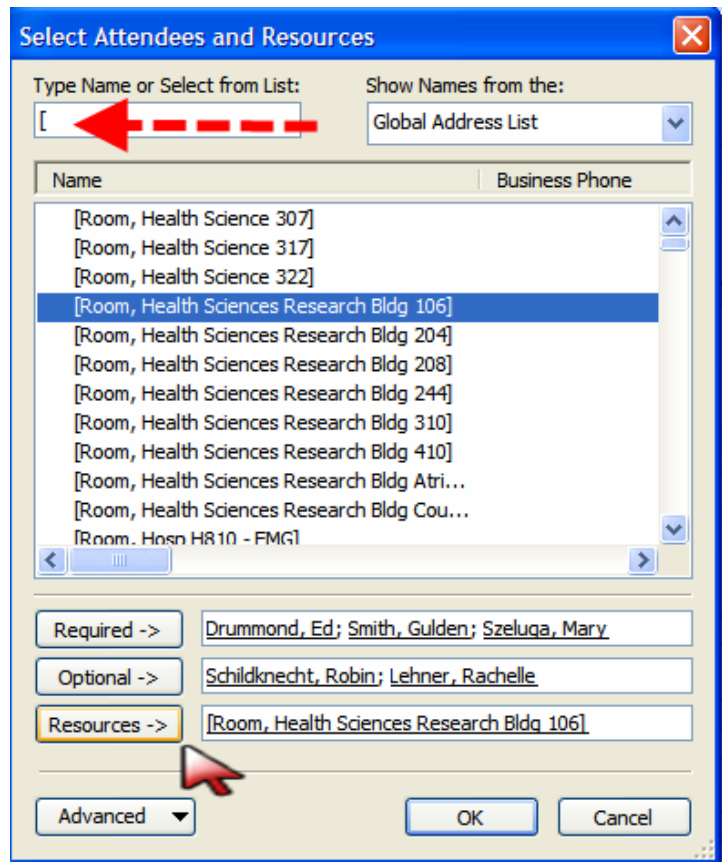
- 1a. A **Select Attendees and Resources** window will open. **Required** attendees would be staff you want to come to the meeting. **Optional** attendees would be staff you want to know about the meeting but do not have to attend the meeting. **Resources** are rooms or equipment needed to conduct the meeting.
- 2a. In the **Type Name or Select from List** field, type the last name of a person you want to attend the meeting. **Note:** Do not press the Enter key.
- 3a. In the **Name** area, click on the person's name to attend the meeting.
- 4a. Click either the **Required** or **Optional** button depending on the preference for that person to attend the meeting.

**Note:** To select other attendees, repeat steps 2a – 4a until all attendees are selected.



**Resources** are conference rooms, labs, proximas, or other equipment that have been setup on the Exchange server. Resources on the Global Address list have to be created by campus just like any other user account on the server. By selecting a Resource, once the meeting is scheduled, Exchange will send an e-mail to the coordinator of the selected Resource. The coordinator of the Resource will determine its availability and respond to the scheduling of it.

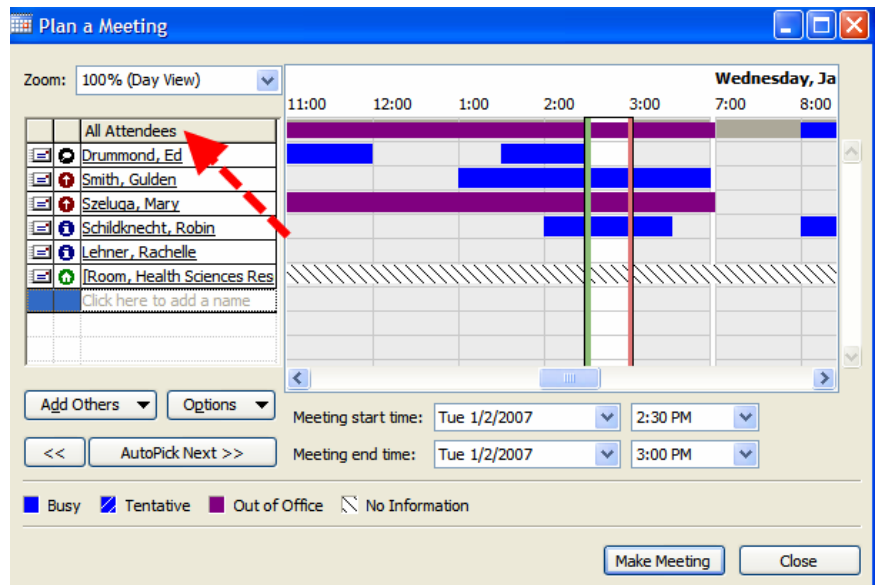
1. ***If a Resource is needed***, in the **Type Name or Select from List** field, delete any name that may be in that field and type the left bracket character. It looks like this: [.
2. Click on the needed Resource to highlight it.
3. Click on the **Resources** button to add it to the Resources area.
4. Once all potential attendees and resources have been selected, click **OK**.



The **Plan a Meeting** window re-opens showing all chosen attendees and resources with busy and available times on their respective calendars showing for each selected attendee and/or resource.

The color coding is helpful in planning your meeting. The meanings of the colors are as follows:

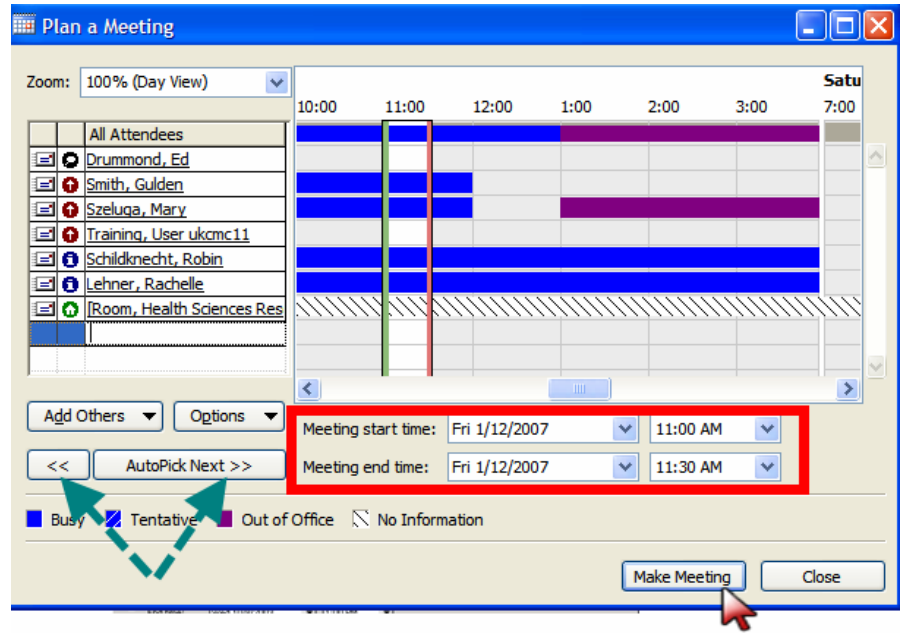
- **Blue** indicates busy times on one's calendar.
- **Blue with stripes** indicates tentatively scheduled times.
- **Maroon** shading indicates times out of the office.
- **White with stripes** indicates no information.
- **White** shading indicates free or available times on one's calendar.



The first line in the list of attendees is named **All Attendees** and gives a summary, as a group, of available/busy times of **all** selected attendees including the selected resources.

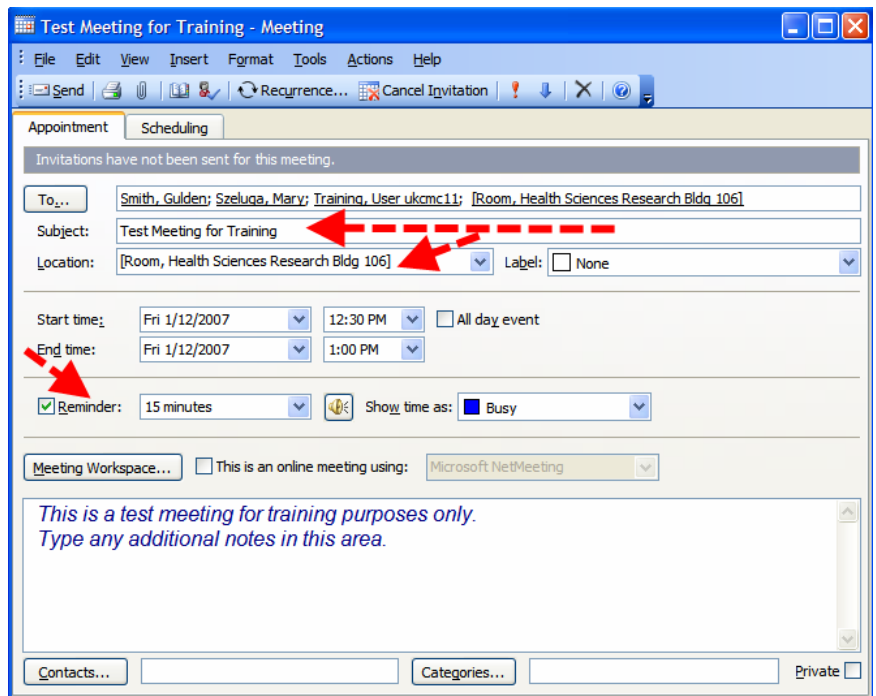
**Note:** This information is only as reliable as each person properly maintaining his/her calendar in Outlook Exchange e-mail.

1. Clicking on the drop down arrows in the **Meeting start time** and **Meeting end time** fields will allow changes to dates and times. If you want the Exchange server to **auto pick** the next available free time for all attendees and resources, click on the **AutoPick Next** button, or to move back in time use the **<<** button.
2. Once the appropriate date and time have been selected, click on the **Make Meeting** button.



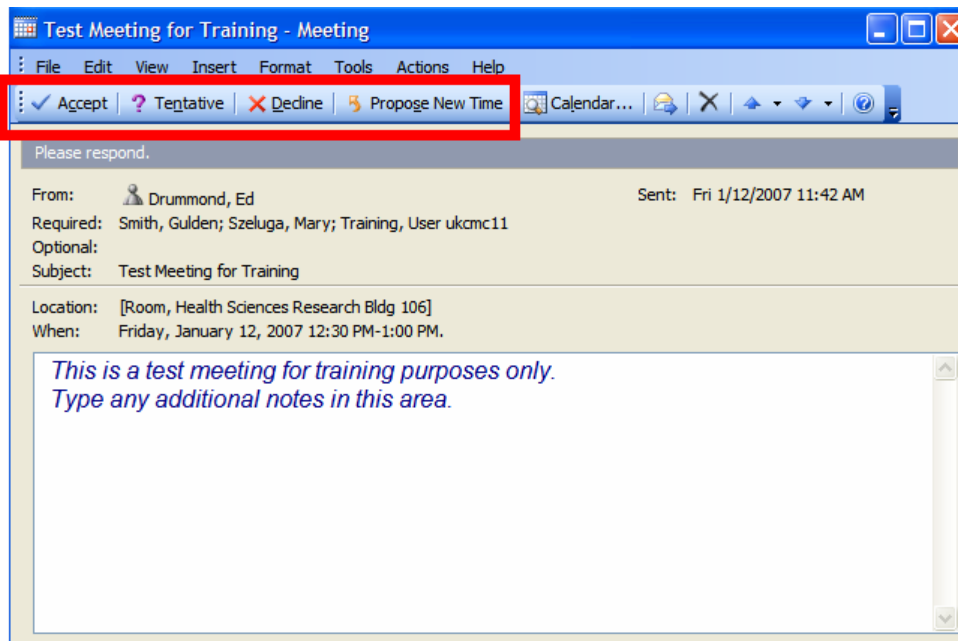
A new untitled e-mail message will open and it will be addressed to all selected attendees and resources.

1. In the **Subject** field, type the subject of the meeting.
2. In the **Location** field, if a resource has not been selected, type in the location of the meeting.
3. Setup a **Reminder** time if you like.
4. Type additional notes in the white space near the bottom of the screen.
5. Click the **Send** button to mail the meeting invitation to all attendees and resources.

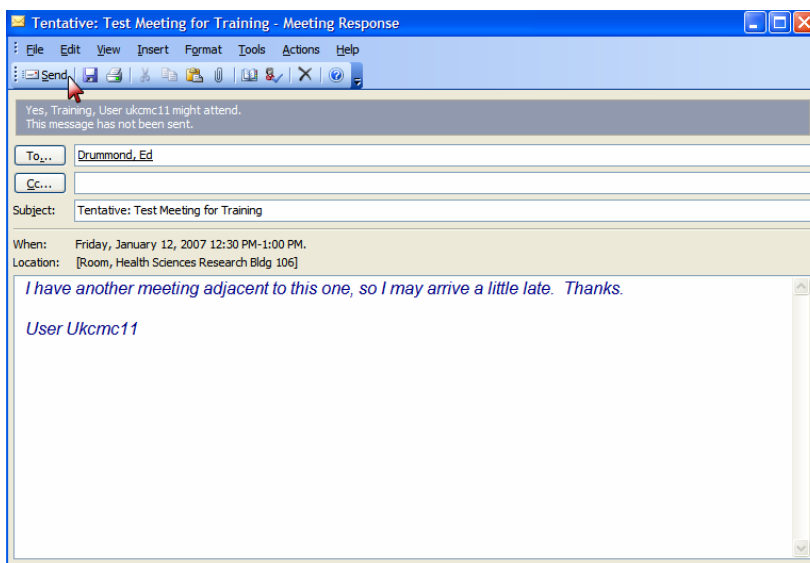


If the **Plan a Meeting** window remains open, close it unless you need to plan another meeting.

All invited attendees and resources will receive an email meeting invitation similar to the one illustrated to the right. Each recipient of the invitation will have the option to respond by **accepting**, **tentatively accepting**, **declining**, or **proposing a new time**.



When an invited attendee responds to the meeting invitation, he/she has the option to send their response to the organizer of the meeting. **It is strongly recommended that the invited attendee send the response to maintain communication.** A response e-mail to the meeting organizer will look similar to the illustration on the left, depending on the chosen option by the respondent.



The organizer of the meeting can open that meeting from his/her calendar, click on the **Tracking** tab to see a summary of responses from the invited attendees/resources.

