

Microsoft® Outlook 2007 Calendar Features

UK
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Participant Guide

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Microsoft® Outlook 2007 Calendar Objectives

After completing this course, you will know how to:

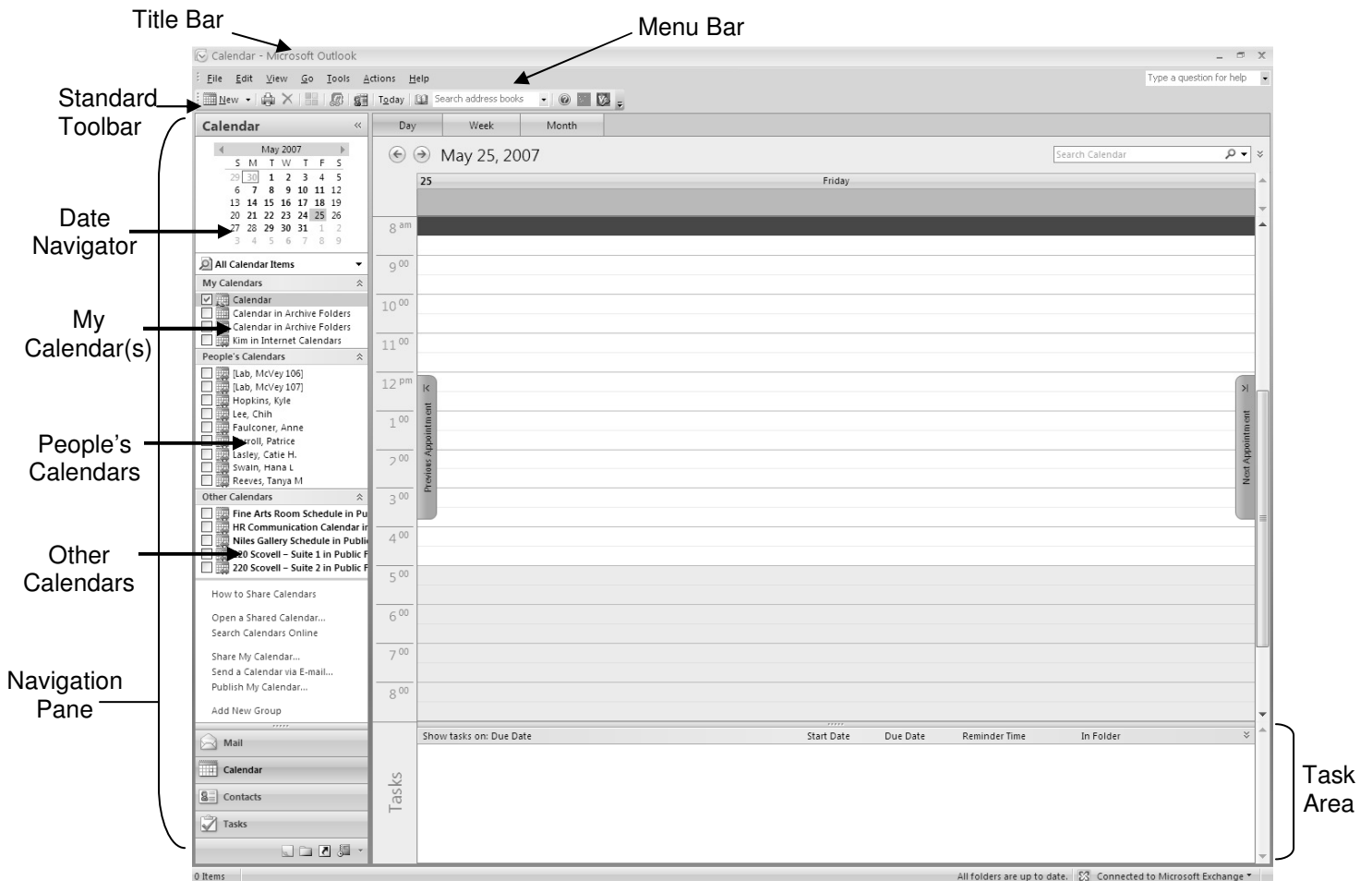
- Identify and customize the Outlook Calendar and Navigation Pane
- Manage Your Own Calendar
 - o Viewing your calendar
 - o Creating appointments and events
 - o Scheduling a recurring entry
 - o Editing calendar entries
- Meetings
 - o Creating a meeting
 - o Responding to a meeting invitation
 - o Making changes to a meeting
- Sharing calendars
 - o Sharing your calendar
 - o Viewing others' calendars
- Use the Group Schedule feature
- Viewing public calendars
- Appendix: Adjust personal calendar settings

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The Outlook calendar is a powerful tool to help organize your appointments, meetings, and important dates. It also allows for the sharing of calendars and integrates calendars and communication through email to create meetings between Exchange users.

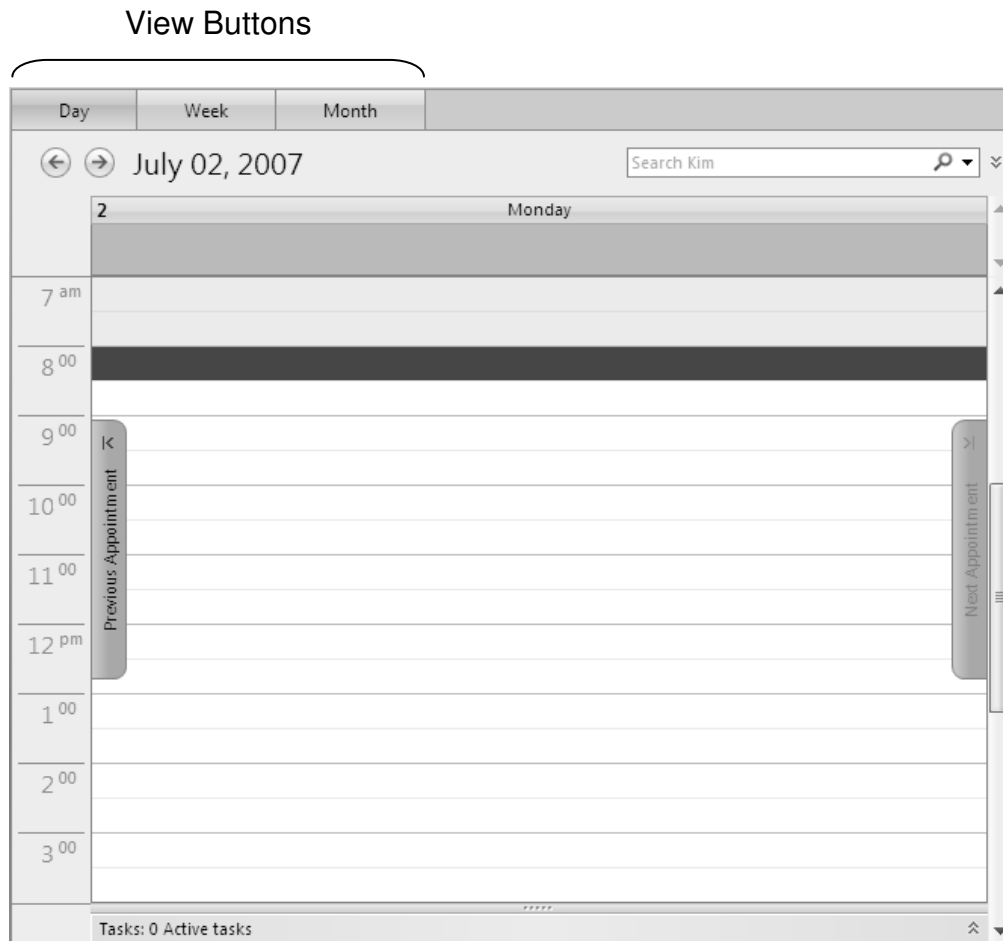
The Outlook Calendar Screen



- A. **Title Bar** – as with any Windows application, the title bar displays the name of the program.
- B. **Menu Bar** - gives access to Outlook commands on menus, including the “File”, “Edit”, “View”, and “Tools” menus.
- C. **Standard Toolbar** – (below the Menu Bar) - provides shortcut buttons to the most commonly used commands, such as “Create a New” item, “Print”, and “Delete”.
- D. **Navigation Pane** – (located on the left side of the screen) contains panels for viewing the various Outlook folders, the Outlook Folder list, and Shortcuts.
- E. **Date Navigator** – This “mini” calendar is used to view the month at a glance, as well as to navigate to a certain date for viewing or making entries.
- F. **My Calendar(s)** – displays your calendar which is stored on the Exchange server. It is possible to create multiple personal calendars under this section.
- G. **People’s Calendars** – this section displays the names of other Exchange user’s calendars that you have viewed (after they have given you permission to do so).
- H. **Other Calendars** – this section displays the names of public calendars you have viewed.
- I. **Task Area** – this area of the calendar displays in Day or Week View and lists tasks under the days that the tasks are due; this section can be minimized to view more of the calendar.

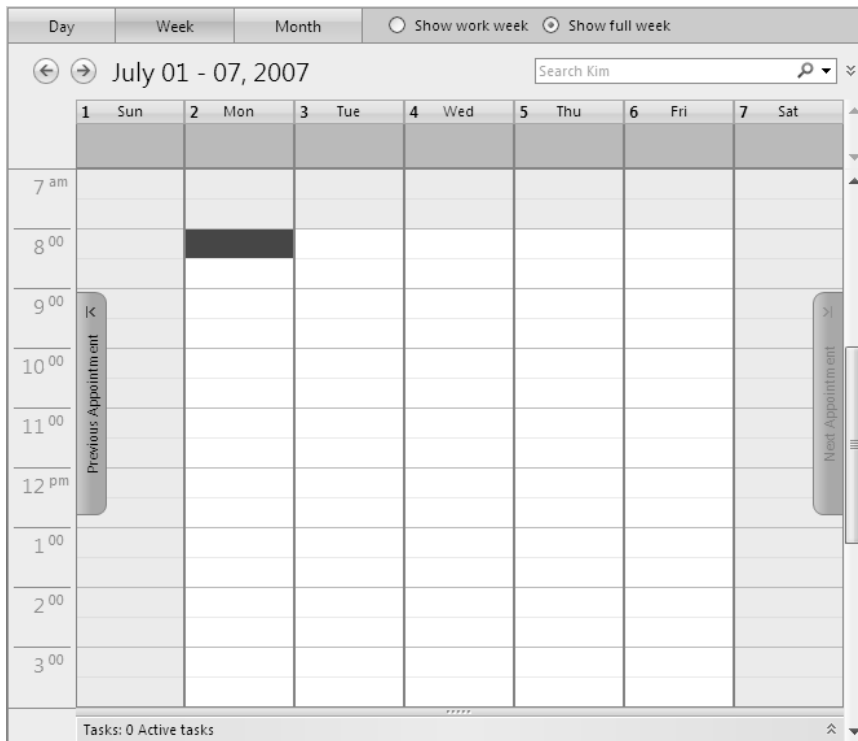
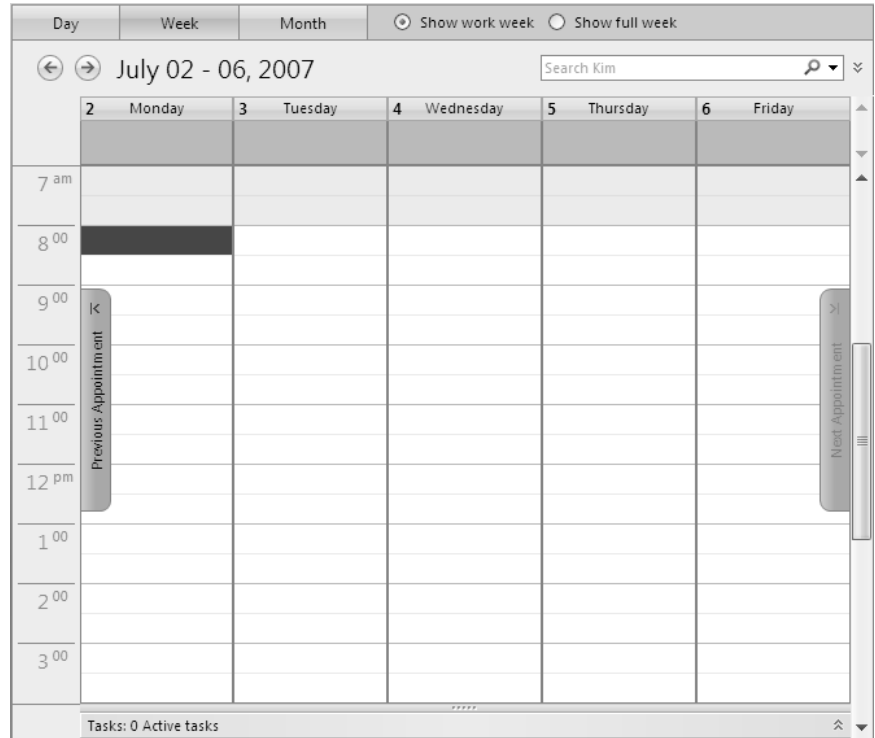
Viewing Your Outlook Calendar

There are three pre-set ways to view your calendar: you can view one day at a time, one week (either the five day work week as defined in your calendar settings or the full 7-day week), or the full month. To switch views, simply click on the view buttons at the top of the calendar.



Week Views

When you choose the “Week” button at the top of the calendar, you will be given the option to choose whether you’d liked to view the week as a 5-day work week...



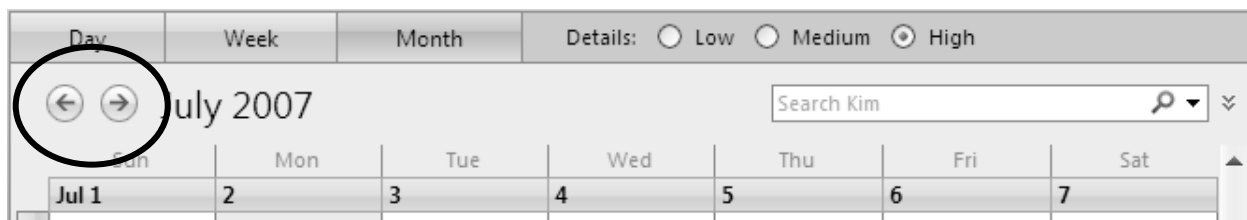
...or a 7-day full week.

Month View

In month view, you can view an entire month on the screen. You can also scroll (using the scroll bars or the scroll wheel on your mouse) through the monthly view advancing one week at a time.



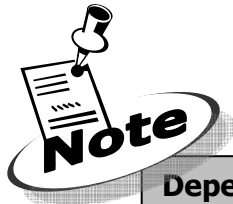
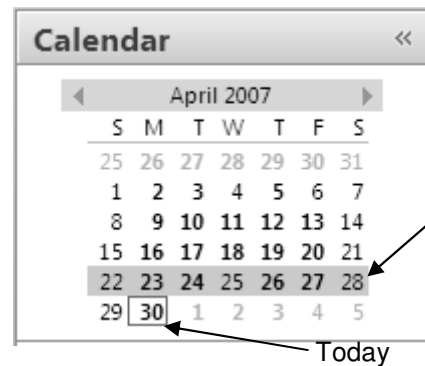
You can navigate to the previous or next day/week/month (depending on the view) by clicking on the left and right arrows between the View buttons and the displayed calendar.



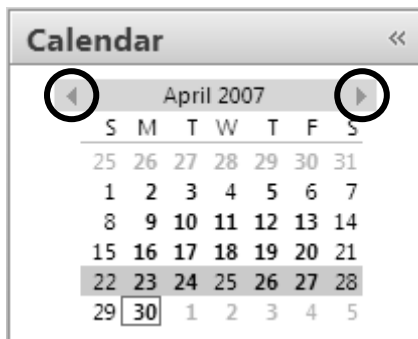
The Date Navigator

When you select a date or range of dates in the date navigator, it will be highlighted in yellow and the details of that day will be displayed on the right side of the screen.

Dates that are displayed in bold represent dates that have meetings or appointments scheduled that day. Today's date will have a red box around it.



Depending on how many calendars you have in the "My", "People's" or "Other" Calendars sections, you could see more than one "mini" calendar in the Date Navigator.

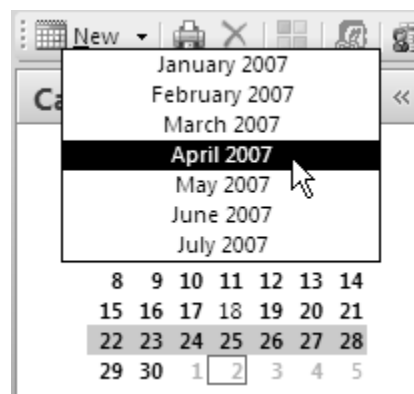
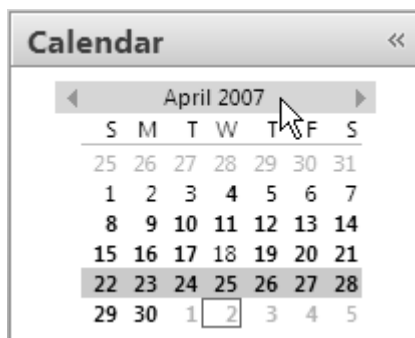


By clicking on the arrows to the right or left of the name of the month, you can navigate to months before or after the current month.

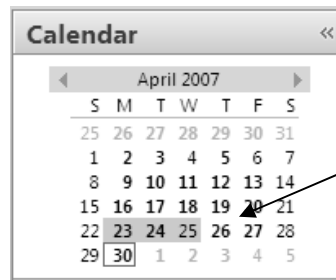
You can also move to different months in your calendar, by clicking on the month name and holding the left mouse button down. Three month names before and after the current month will be displayed. Keep the left mouse button pressed down, slide to highlight the month you would like to go to, and when you release the mouse button your calendar will display the month you've chosen.

Click on the month name...

to display this menu.

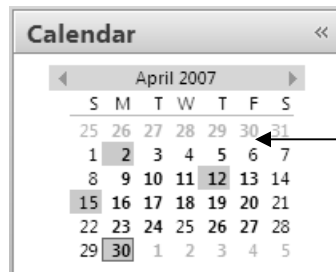


Tip -- If you wish to see a group of dates that doesn't fit into one of these pre-set views, simply click and drag to select the dates in the Date Navigator.



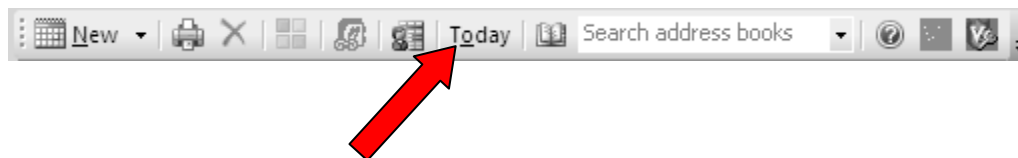
Click and drag to select the dates you wish to view! This will display the 23rd, 24th, and 25th.

Tip -- If you wish to see a group of dates that doesn't fit into one of these pre-set views and are not consecutive, simply press the Ctrl key on the keyboard when you are selecting the dates in the Date Navigator!



This will display the 2nd, 12th, 15th, and 30th.

Tip -- Once you have navigated to a date in the future or past, you can very easily return to the current day/week/month by clicking on the **Today** button in the **Standard toolbar**.



Appointments and Events

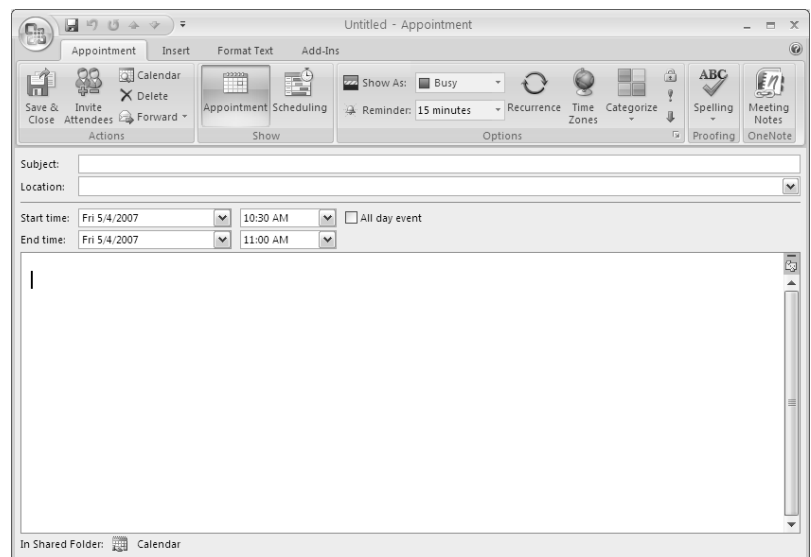
Calendar Entry Types

You can create three types of entries on your calendar:

1. **Appointment** – an activity that has a start and stop time and does not involve inviting other people or reserving resources.
2. **Meeting** - an activity that has a start and stop time to which you invite people and resources
3. **Event** – an activity that lasts at least 24 hours

Creating an Appointment or Event

1. In the monthly calendar pane, select the month and date.
2. Click on the “New” entry button in the standard toolbar (the first button).
3. Enter a **Subject**
4. Enter a **Location** (Outlook will keep a running list of frequently used locations)
5. If entering an Appointment: Enter **Start and End times** (enter dates and times or use drop-down menus to display calendars)
If entering an Event: Check “All day event”
6. Change any other settings in the Options area on the Ribbon. (See Other Appointment Options on pg 8)
7. Enter any notes (directions, what to bring, etc.) in the large text box
8. Click **Save and Close** button to return to the calendar.



Editing Calendar Entries

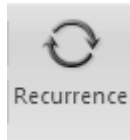
Once you have saved and closed an appointment, meeting, or event, you might need to make changes to it. Use one of the following methods to edit an activity:


1. Double-click on an appointment on your calendar to open it (Single-clicking selects the entry)
2. Click and drag the entry to the correct date/time (using date navigator and calendar view)

Schedule a Recurring Entry

If you have meetings, appointments, etc. that occur frequently (and follow some pattern) you can save yourself time by entering them as recurring entries.

1. When entering the activity, click the **Recurrence** button in the **Options** area of the Ribbon.
2. Verify the start and stop time and duration
3. In **Recurrence Pattern** area, indicate the frequency of the activity (Daily, Weekly, Monthly, or Yearly). When you select an option, the **Recurrence Pattern** choices change.
4. Specify how long the recurrence will last in the **Range of Recurrence** section
5. Click OK to close the **Appointment Recurrence** box
6. Save and Close the Appointment

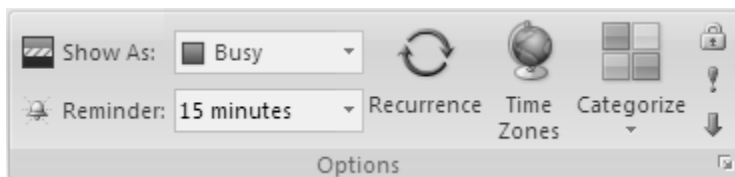


Note: A recurrence icon  will appear in the bottom right hand corner of the appointment bubble on your calendar.

Other Appointment Options

In addition to recurrence, you can change other options in your calendar appointment such as **Reminders, Privacy, Categories** and **Show Time As Status**.

With the Calendar Item open, look at the Options group on the Ribbon to find the options available to you:



Reminder

Under the Options group on the Ribbon, select a **Reminder** option and specify when you want to be reminded (default is 15 minutes).

Status

Every item that is entered into your calendar has a status attached to it. This is important when other people view your calendar or look at your status for meeting invitations. Status options include:

- Free – displayed on calendar with a white line
- Busy – default setting in calendar, no special display in calendar view. Displayed in group schedules or the Schedule tab with a dark blue line
- Out of Office – displayed with a purple line
- Tentative – displayed with a blue and white slashed line


To adjust the status, go to the Options group on the Ribbon of an open calendar appointment. In the **Show As** drop-down list, choose how you want to display the time in your calendar.

If you do not change the status, Outlook will default to the status associated with the entry type:

- Appointments default to a busy status
- Meetings default to a busy status
- Events default to a free status

Private Appointment

You can set an appointment to be private by clicking on the lock icon in the Options group. This will prevent individuals from viewing the details of your appointment.

The Private icon  will appear in the bottom right hand corner of the appointment bubble on your calendar.

➤ ***Tips and Tricks for Managing Your Own Calendar:***

- Click and drag an email to your calendar to quickly create a calendar entry and include the email in the details section
- View non-adjacent dates in the date navigator by holding down the **Ctrl** key
- Copy calendar entries by holding down the **Ctrl** key when clicking and dragging

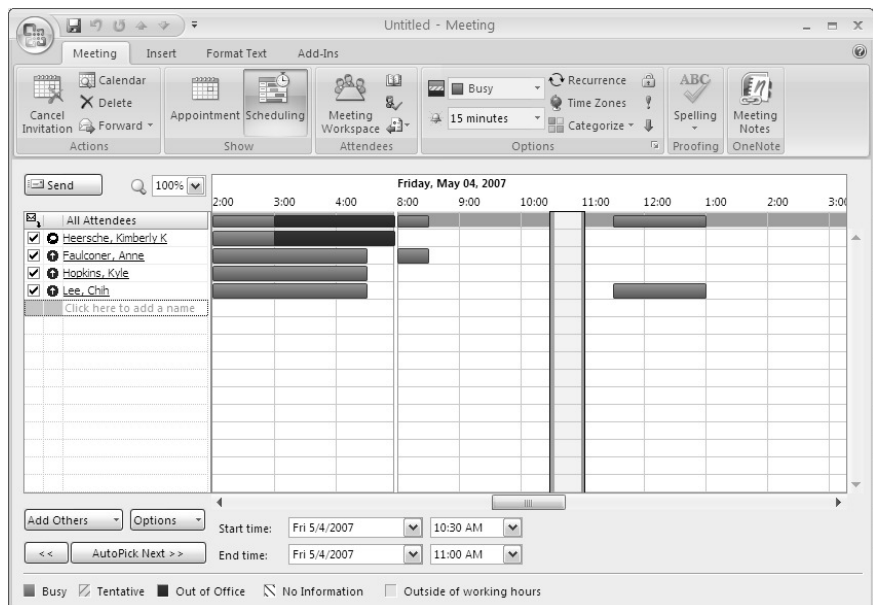
Meetings

Meetings combine the flexibility of the calendar feature in Outlook and the communication tool of Outlook's email to make scheduling meetings a much easier task.


Creating a Meeting

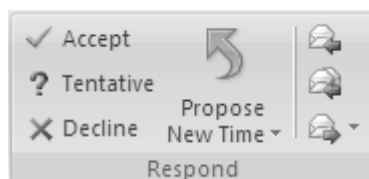
The steps to create a meeting are similar to creating an appointment or event. However, before saving the entry, you will select people from the Global Address List (a list of people on the exchange server) to invite to the meeting. Regardless of what rights you have to their calendars, you will be able to see their status (free, busy, out of office, or tentative).

1. Click on the down arrow next to the New button on the Standard Toolbar and choose **New Meeting Request**
2. Select the names of the attendees from the Global Address List by clicking the **To:** button (as you would address an email)
3. Enter the information about the meeting, including the subject, location, start and end dates/times, reminder, status, and notes you wish to include
4. Click on the **Scheduling** button in the "Show" Group on the Meeting Tab of the Ribbon to display scheduling information (as shown to the right)
5. Note the time grid to the right of each attendee name showing availability, the legend (showing the colors corresponding to the status) and the first row, summarizing "All Attendees"
6. When finished, click the **Send** button to send the invitations via email.



Responding to a Meeting Invitation

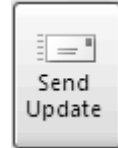
Meeting invitations appear in the inbox with a calendar icon  to the left of the message. When you read the message, you will have an opportunity to accept or decline the invitation, tentatively accept, or propose a new time by using the options in the "Respond" Group on the Meeting tab. The response is automatically emailed to the meeting organizer.



NOTE: Until you respond to the invitation, the meeting will automatically be scheduled in your calendar with a "Tentative" status. If you accept the invitation, it automatically goes into your calendar with the settings the meeting organizer selected (reminder, status, notes, etc.)

Making Changes to a Meeting

As the meeting organizer, Outlook will recognize any changes that you make to the meeting and will encourage you to send updates to the attendees. If you choose to send an update, the attendees will be given an opportunity again to accept, decline, tentatively accept, or propose a new time.



Once meeting invitations have been sent, the meeting organizer can easily keep track of responses. A third option in the "Show" Group of the Meeting tab, labeled "**Tracking**" will appear in the meeting entry in their calendar. The Meeting Organizer can click this Tracking button to see who and how someone has replied to the meeting request. (See Below)

 A screenshot of the Outlook 2007 Meeting Tracking window. The window title is "Outlook Presentation to College of Education - Meeting". The ribbon includes "Meeting", "Insert", "Format Text", and "Add-Ins". The "Meeting" tab is active, showing groups for "Actions", "Show", "Attendees", "Options", "Proofing", and "OneNote". The "Tracking" button is highlighted in the "Show" group. Below the ribbon, a table displays the following responses:

The following responses to this meeting have been received:		
Name	Attendance	Response
<input checked="" type="checkbox"/> Heersche, Kimberly K	Meeting Organizer	None
<input checked="" type="checkbox"/> Lee, Chih	Required Attendee	Accepted
<input checked="" type="checkbox"/> [Lab, McVey 106]	Resource (Room or Equipment)	None
Click here to add a name		

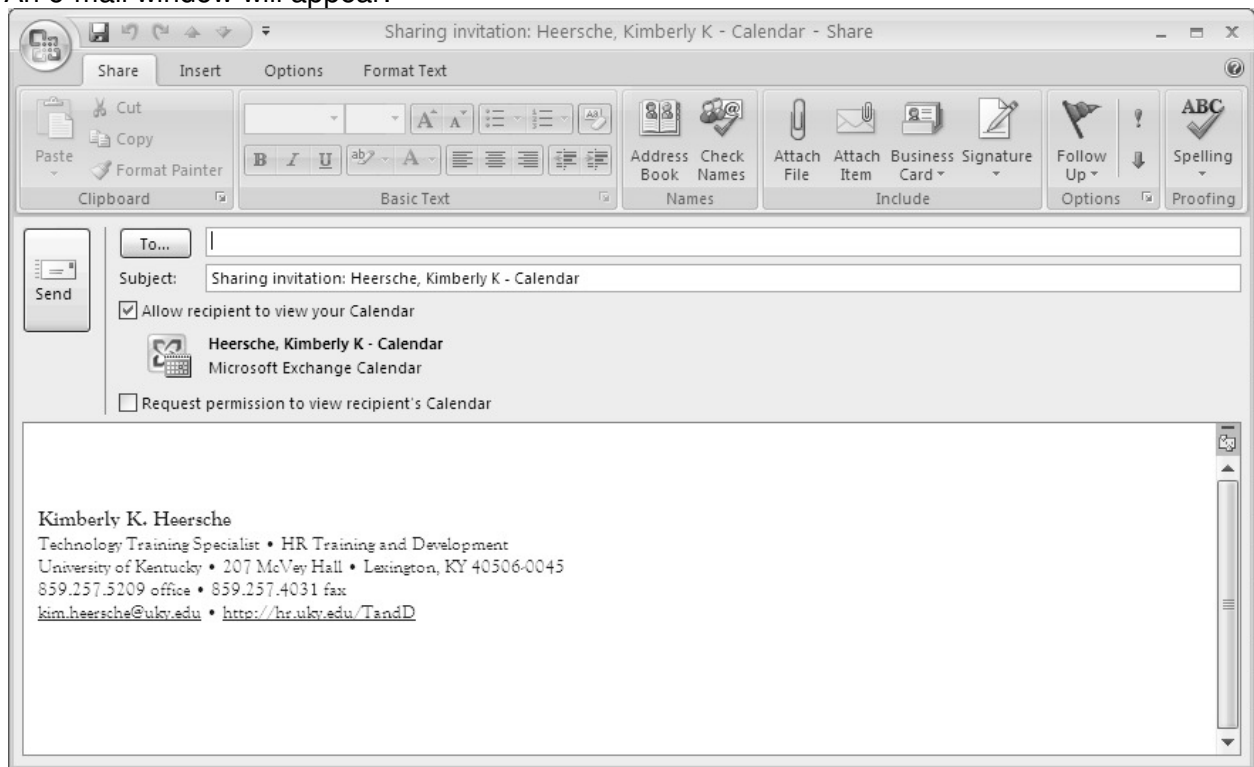
Note: Meeting attendees will not have access to the Tracking section, but will be able to see the "Scheduling" section and thus, can see who else is participating in the meeting.

Sharing Calendars

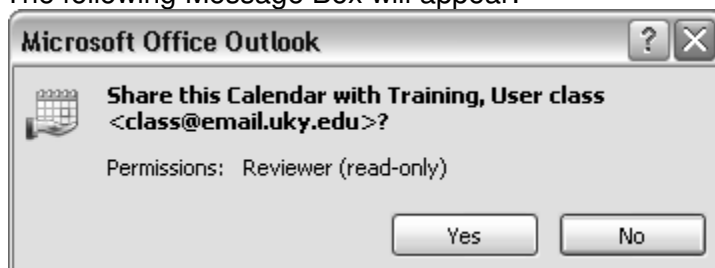
Although it is not necessary to share calendars to be able to use the meeting feature, many departments find it useful to share calendars. When sharing calendars, you determine who to give access to as well as how much access to give each person.

Sharing Your Calendar

1. Click on “Share My Calendar...” in the Navigation Pane
2. An e-mail window will appear:



3. In the **To...** field, type or select the name of the person to whom you want to grant sharing permissions.
4. The check box next to “Allow recipient to view your calendar” will be checked.
5. If you would also like to ask for permission to view the same individuals calendar, check the “Request permission to view recipient’s Calendar” box.
6. Press Send.
7. The following Message Box will appear:



8. Click Yes to confirm your decision to share your calendar.

Viewing Other People’s Calendars

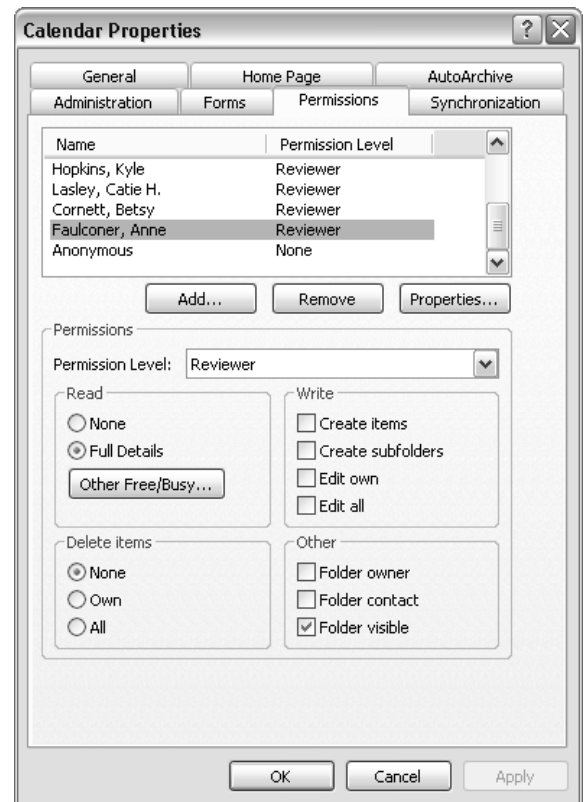
1. Click on “Open a Shared Calendar...” in the Navigation Pane
2. Click on the “Name...” button
3. Select the name from the Global Address List and click OK
4. Click **OK**

NOTE: Once you have viewed a person’s calendar, it will appear in the “People’s Calendars” section of the Navigation Pane with a checkbox that allows you to open and close the person’s calendar with the click of a button. To remove the calendar from your

5. “Other Calendars” section, right-click and select “Remove from Other Calendars.”

Permissions

To check permissions, right click on a calendar and choose “Change Sharing Permissions...” The Properties Window will open up to the Permissions tab (see right). You will see a list of people whom you have given rights to see your calendar and what level of permissions each has been given.




Permission Levels

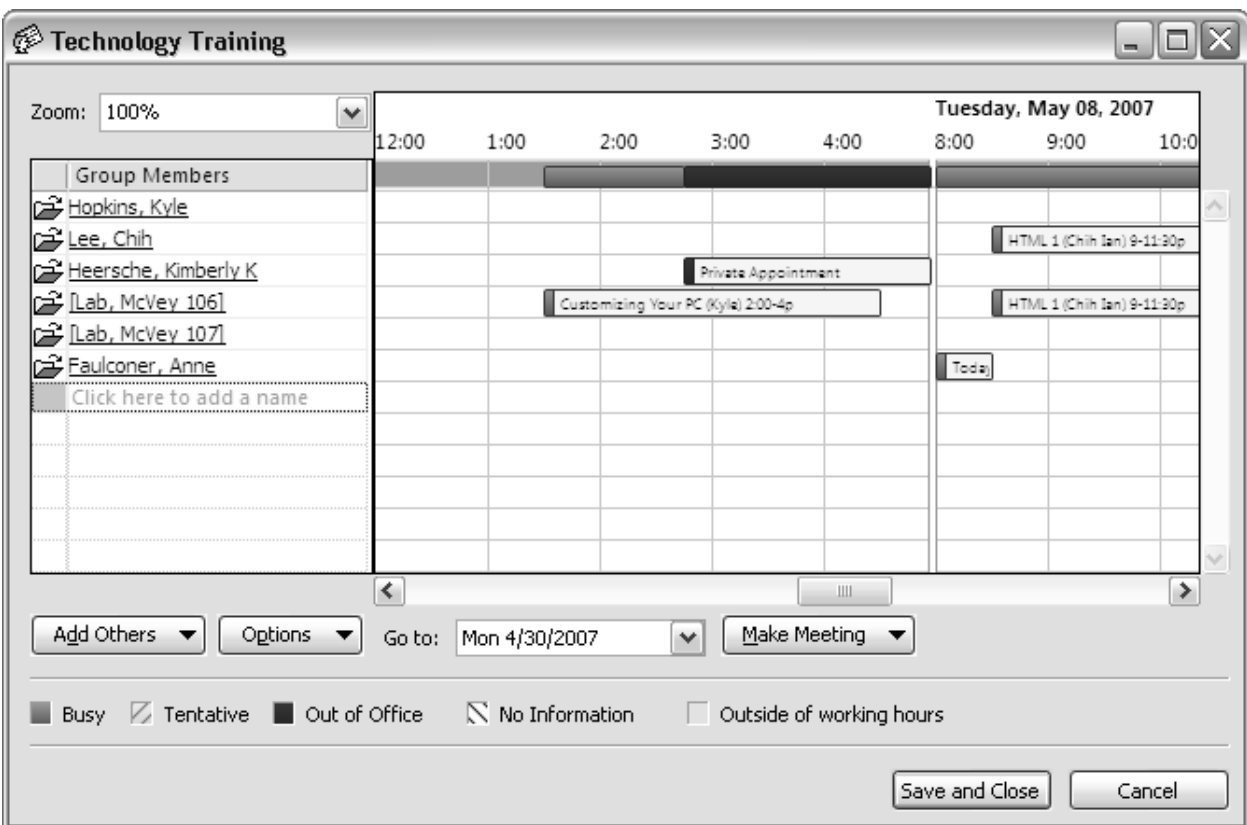
<u>In this Role:</u>	<u>You have these permissions:</u>
Owner	Create, read, modify, and delete all items and files and create subfolders, and change the permission levels others have for the folder
Publishing Editor	Create, read, modify, and delete all items and files, and create subfolders
Editor	Create, read, modify, and delete all items and files
Publishing Author	Create and read items and files, create subfolders, and modify and delete items and files you create
Author	Create and read items and files, and modify and delete items and files you create
Reviewer	Read items and files only
Contributor	Create items and files only. The contents of the folder do not appear

Group Schedules

Use the Group Schedules feature to view several people's availability on the screen at one time (regardless of what rights you have to view their calendars) without having to actually schedule a meeting.

1. Click the Group Schedules button in the Standard toolbar 
2. Click the **New...** button to create a new group
3. Type a name for the group and click OK
4. Add members to the group by clicking Add Others and selecting them from the Global Address List (or typing the name in the next available row)


NOTE: If you have reviewer rights to the person's calendar, the details of their calendar will appear. If you do not, you will see their status (busy, tentative, out of office) represented by a color. If an activity has been marked "private," the status will be visible, but the entry will read "Private Appointment" (see below).

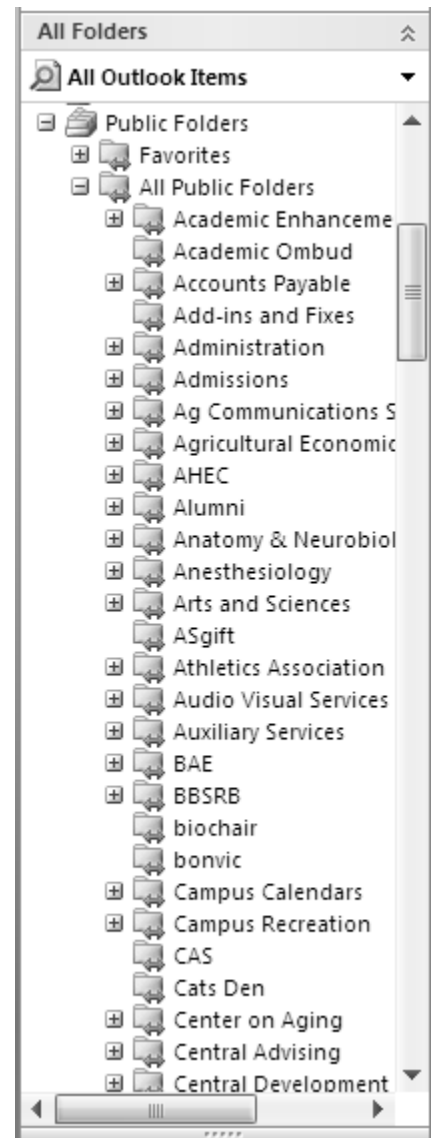


Public Calendars

Many departments at the University of Kentucky make use of public calendars. For example, many training rooms and conference rooms are kept on a public calendar in Outlook.

Viewing Public Calendars

1. Display the folder list by clicking on the folder icon  in the navigation pane
 2. Scroll down and click on the plus sign by “Public Folders”
 3. Click on the plus sign by “All Public Folders”
 4. Continue to scroll down and expand (click on the plus sign) until you have located the calendar you wish to view.
 5. Click on the calendar
 6. In the Folder List, click and drag the calendar to the “Favorites” folder under the “Public Folders” (see below)
- **Tips and Tricks for Public Calendars:**
- Right-click on the public calendar and select “Add to Favorites” to add the public calendar to your “Other Calendars” section.
 - With your calendar and the public calendar side-by-side, click and drag to copy entries from one calendar to the other



Appendix: Customizing Your Calendar

Set your default work schedule, change your calendar's color, add holidays to your calendar, specify the default reminder (time and sound), and more!

Setting the Default Reminder

By default, every entry that is entered into the Outlook calendar automatically has a reminder set. (The default reminder is 15 minutes). You can change the amount of time for this reminder for all new entries or turn it off altogether. (*Reminders can still be changed on a case-by-case basis; this is simply what the default setting will be.*)

1. Go to **Tools → Options**
2. Clear the checkmark to remove the default reminder or change the amount of time.
3. Click **OK**.

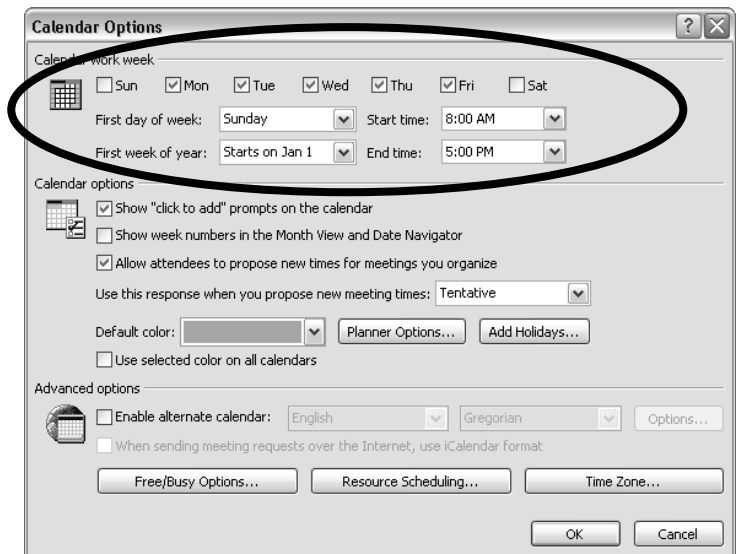
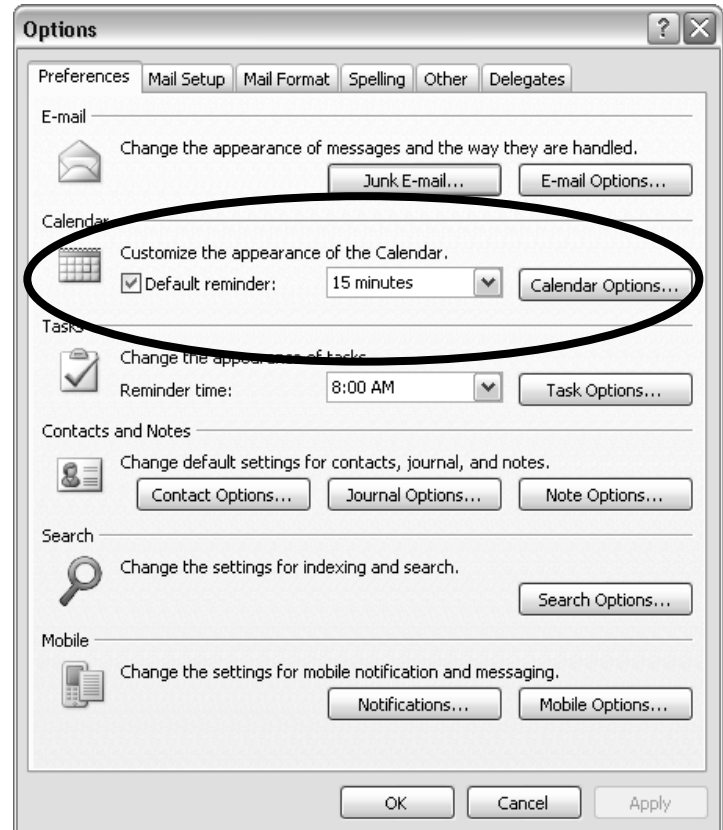
Setting Your Work Schedule

The default work schedule for everyone in Outlook is 8:00am to 5:00 pm. However, if you work a different schedule, it is a good idea to change your work schedule in Outlook. This is extremely important when others are viewing your availability for scheduling meetings.

1. Go to **Tools → Options → Calendar Options**
2. Check off the days/times that you work in the "Calendar work week" section
3. Click **OK**

*The "First day of week" section allows you to specify which day of the week appears first in the Date Navigator.

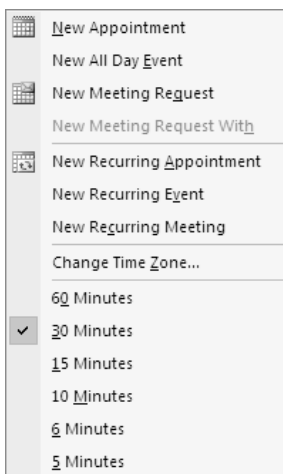
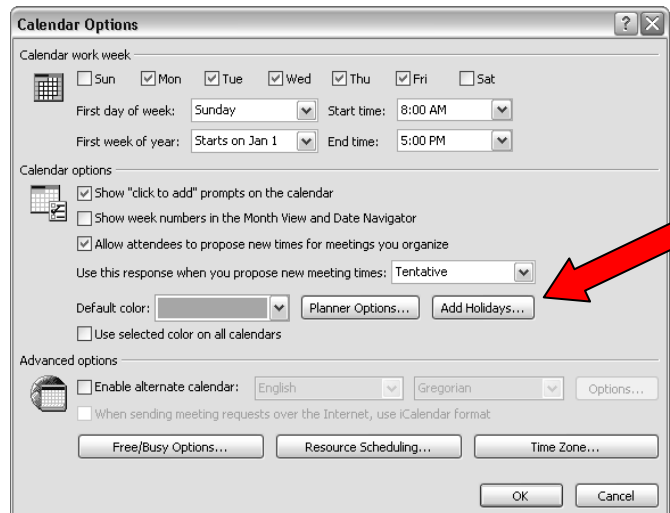
*Your work schedule will be displayed in a different shade of color in the Day and Week views.



Adding Holidays

To add all of the United States holidays to your Outlook calendar, do the following:

1. Go to **Tools** → **Options** → **Calendar Options**
2. Click **“Add Holidays...”**
3. Place a checkmark beside **“United States”**
4. Click **OK**
5. Click **OK**
6. Click **OK**



Changing the Time Scale

When viewing your calendar in the Day or Week formats, the times are displayed on the left side of the screen in 30-minute increments. This time scale can be changed to display time in 5, 6, 10, 15, 30, or 60-minute increments.

1. Right-click on the left side of the screen where the time is displayed
2. Left-click to select the time increment you want

Changing Fonts

There are a variety of other settings that you can change to give your Outlook calendar a unique look. For example, you can change the font of the time scale (displayed in the Day or Week views) or change the font used for entries in all of the views to make it easier to read.

1. Right-click anywhere on the calendar screen
2. Click **“Other Settings...”**
3. Select the options you want
4. Click **OK**

