

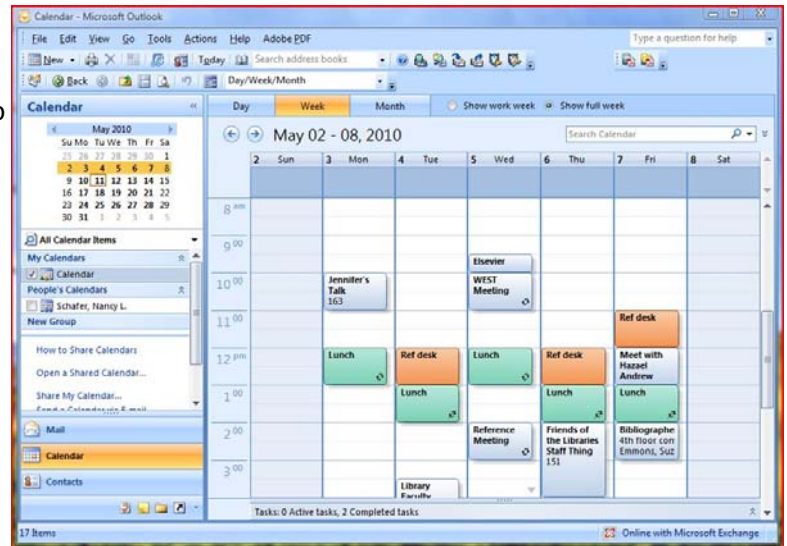
Managing Your Calendar with Outlook 07

Do you ever wish that you could see a co-worker's schedule? Have you gone looking for someone in their office only to learn that they're in a meeting three floors away? Or do you think it should be possible to schedule a meeting without sending a dozen emails? These things are not only possible, but simple with shared calendars. In this session, we'll talk about how to use Outlook to create calendars, share schedules, and streamline collaboration.

Getting Started

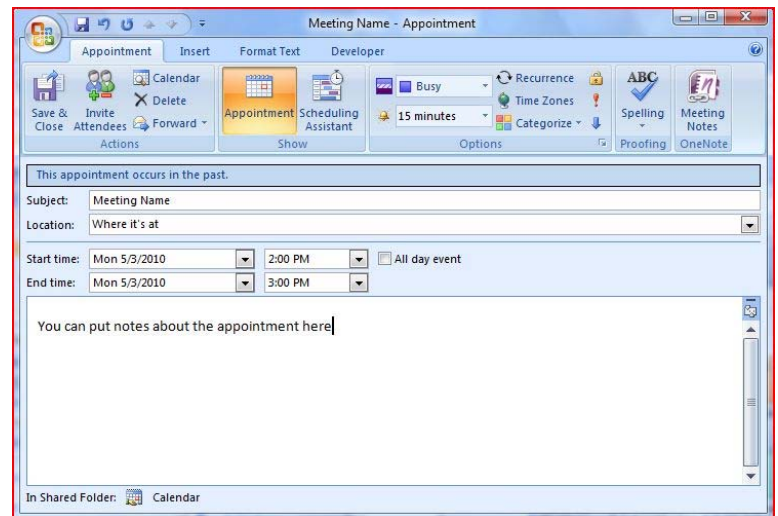
Open Outlook and look at the layout. You'll see that your schedule appears on the right. On the left, you'll see a smaller calendar that allows you to navigate between different weeks and months. The week that you are looking at will be highlighted in yellow and the current day will have a red box around it.

Further down the left side, you can see which calendars you are viewing. By default, you'll see one calendar under "My Calendars." Whenever the box next to it is checked, you are viewing your calendar. Below, you can add other people's calendars, once they have given you permission.



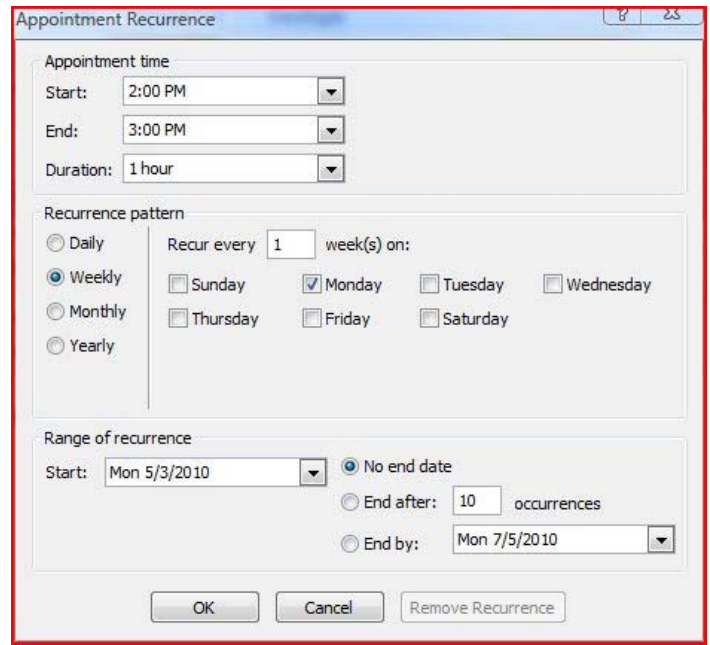
Entering an Appointment

To enter a new appointment, simply navigate to the correct week. Then, on the right side, double click the box that corresponds to the time and day. You can then add the subject and location of the meeting, along with any notes. You can also adjust the start and end time of the meetings. At this time, you can also choose when or whether you'd like to receive a reminder by adjusting the time next to the picture of the bell in the "Options" area.



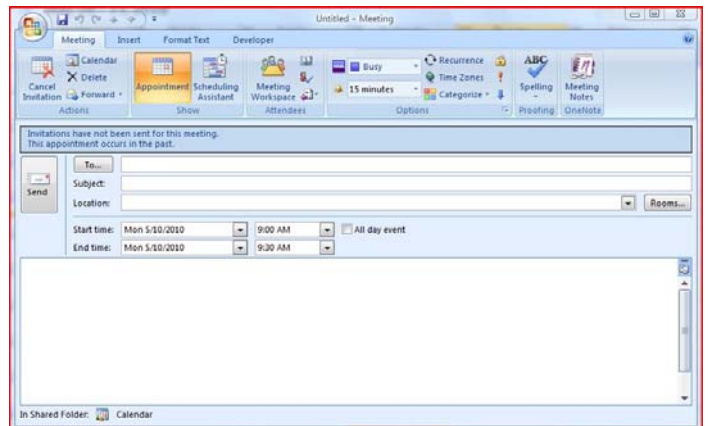
Regular Meetings

If you have a regularly scheduled meeting, it's probably a good idea to set up a recurrence. Click on the two arrows that form a circle in the "Options" area. A new window will open that allows you to set a pattern. You can set the range of the recurrence so that it occurs for a set number of times or until a specific date. When you are finished, press "OK."



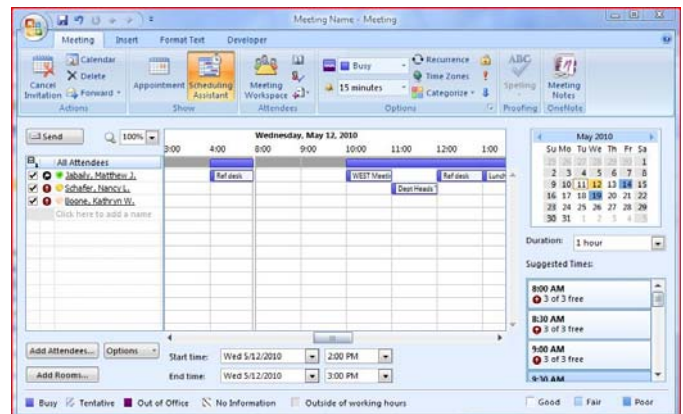
Inviting Others

It's easy to invite other people to join your meetings and appointments. Press the button in the top left corner that says "Invite Attendees." A "To..." line, like in an email, will appear and you can enter in the email addresses of everybody you want to invite. When you have added all the names you want, you can press the "Send" button and they will receive an invitation in their inbox. They can then reply with whether or not they will come.



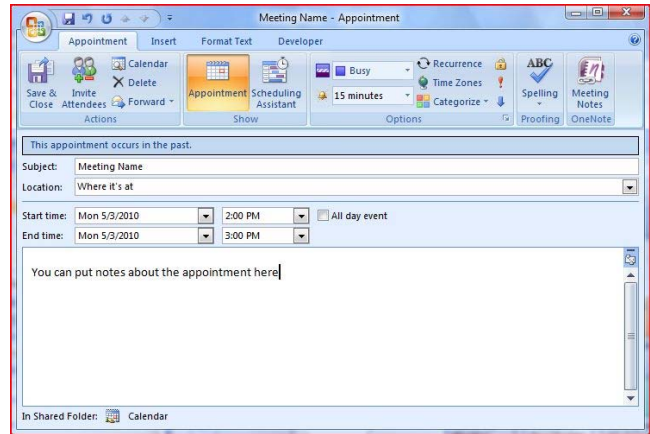
Using the Scheduling Assistant

Sometimes you're trying to find a time in which to schedule a meeting and it would be helpful to know when other people are busy. In the "Show" box, click on "Scheduling Assistant" and you will see a list of all of the people you have invited. Beside it, you will see a grid that shows at what times they are available or busy. In the lower right corner you'll see a list of suggested times; these are times near where you initially set your meeting that many or all of your attendees are available.



Closing/Reopening the Appointment

If you have not invited any other participants you can finish by pressing the “Save & Close.” If you have invited others, you’ll close the window by pressing the “Send” button. To reopen and modify a scheduled appointment, simply double click it on your calendar. If you make changes to an appointment that has other invited attendees, you will be asked before you close it if you want to send them an update.



Arranging and Rearranging

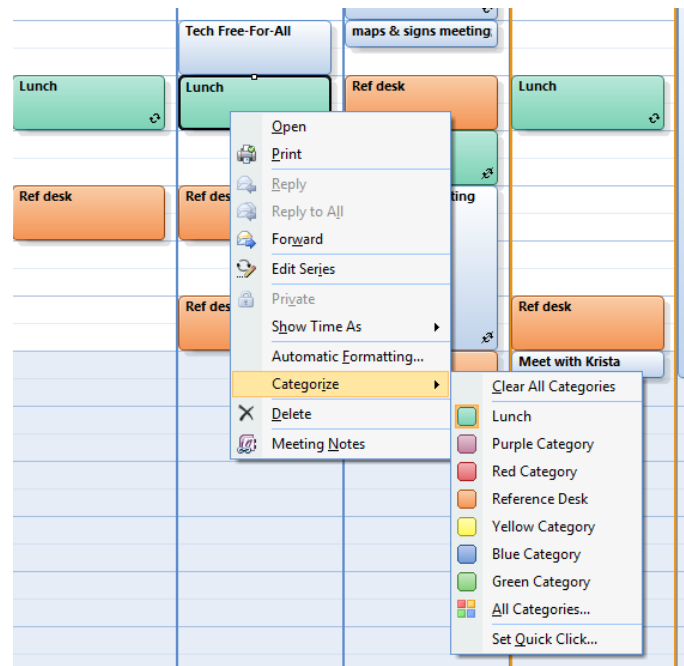
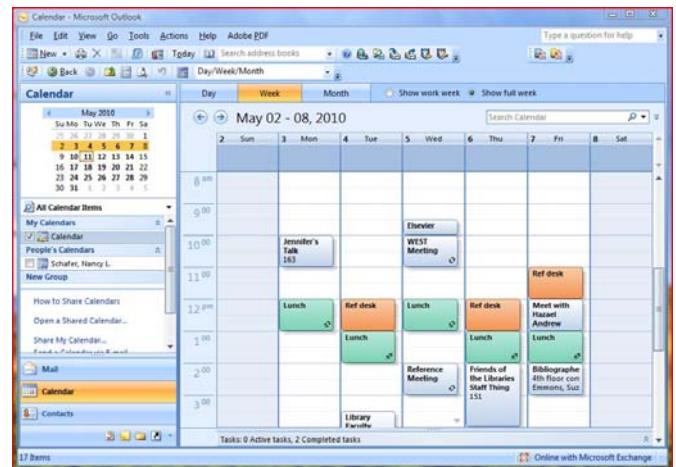
For appointments without other invited attendees, arranging and rearranging is simple. If you need to change a time, for example, you can double click an appointment and adjust the start or end time. It is simpler, however, to click on the box for the appointment and drag it to where you want it. You can also expand a box by clicking on the top or bottom edge of the box and dragging it up or down to change the duration.

If you want to set multiple appointments with the same characteristics you can copy (Ctrl+c) and paste (Ctrl+v) appointments. For example, each week you could paste in your service desk hours.

You can also categorize appointments, giving them different colors. To do so, simply right click an appointment, and hover over Categorize; you can then assign it a category.

For example, you can make all your service desk hours the same color, so they are easier to see. You could also use a color to highlight a particularly important appointment.

To delete a meeting, you can right click it and choose “Delete” or simply click on it and press the “Delete” key.



Sharing Your Calendar

The real advantage of using your outlook calendar instead of (or in addition to) another calendar is the ability to share you calendar with co-workers.

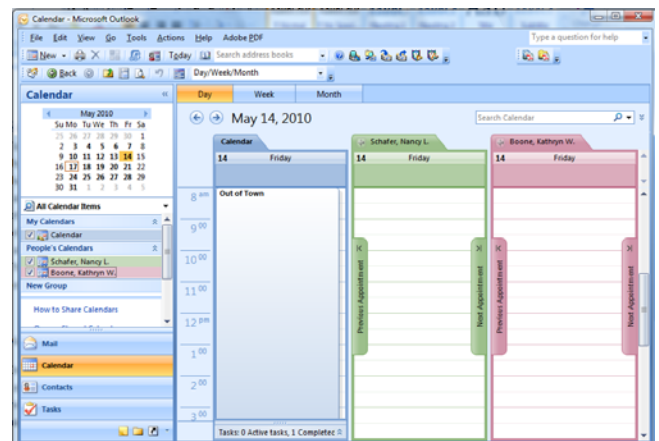
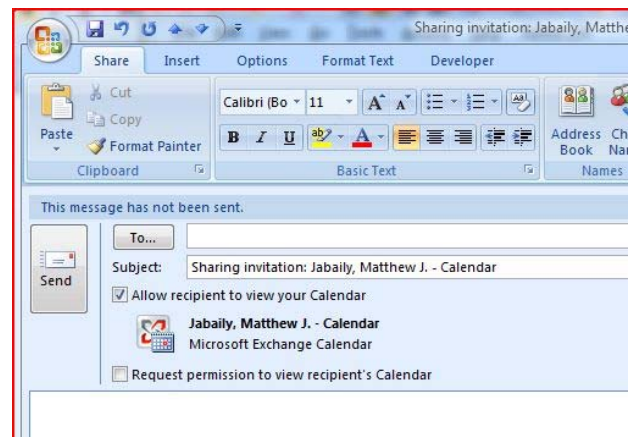
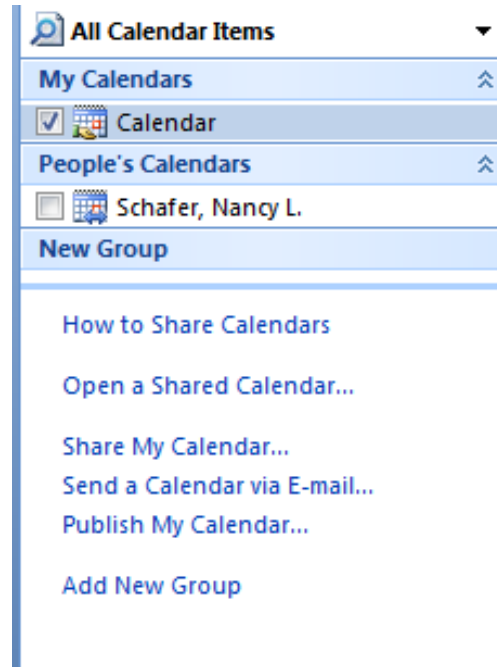
By default, calendars are kept private. This means that you can't see other people's calendars and they can't see yours. To make calendars accessible, you have two options. You can either ask people individually to allow calendar sharing or you can reset the default to allow others to see your calendar.

Sending an Invitation

To send an invitation, click on the link on the left sidebar that says "Share my Calendar..." In the "To..." line, write the email addresses of anybody you'd like to share calendars with. Below, you'll see two check boxes. One lets you allow other people to see your calendar. The other one requests that they allow you to see their calendar. You can check one or both of these boxes. There is also an area below to add any text you'd like to send along with the sharing request.

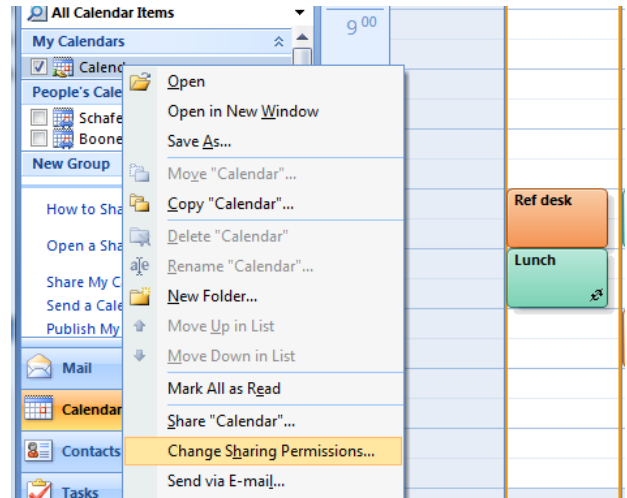
Viewing a Shared Calendar

Once you have received permission to see someone's calendar, you will see their name and calendar appear in your list. To view it, check the box beside the person's name. Check more than one box to see multiple calendars side by side (it may be easier to look at one day rather than a whole week or month). You can delete the shortcut to the calendar by right clicking it and choosing "Delete..." To add a name to the list, you can click on the link that says "Open a Shared Calendar" and then enter the person's name.



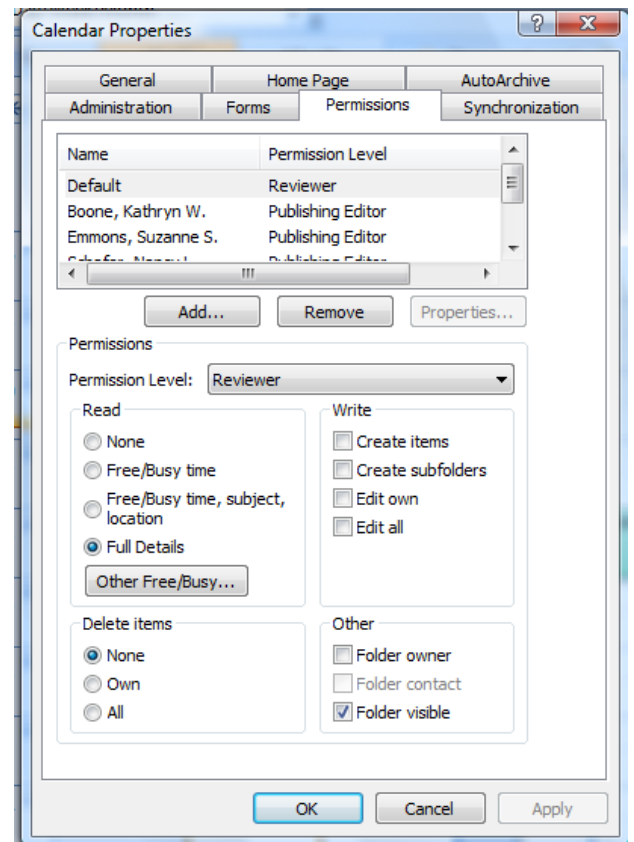
Resetting your Calendar Sharing Defaults

Instead of sharing your calendar with many individuals, you can set your calendar to be public, allowing anybody in the ODU system to view your calendar without asking permission. To do this, right click your calendar's icon on the left side list. Then choose "Change Sharing Permissions..."



In the Permissions menu, you can change how much of your calendar other people can see. You can assign rights to individuals or change "Default" to allow any user to have rights (unless you have specifically given that person special rights). There are many presets that you can use to set the level of permission. For example, a "Reviewer" can see the full details of your calendar but can't make any changes. If you set the level to "Free/Busy time," a person will be able to see if you are available but not any of the specifics. A "Publishing Editor," on the other hand, has the ability to add and delete items from your calendar without asking permission.

You should set the level of permissions for the default user according to what you are comfortable allowing everyone to know. It is not recommended that you give the default user any write/delete privileges.



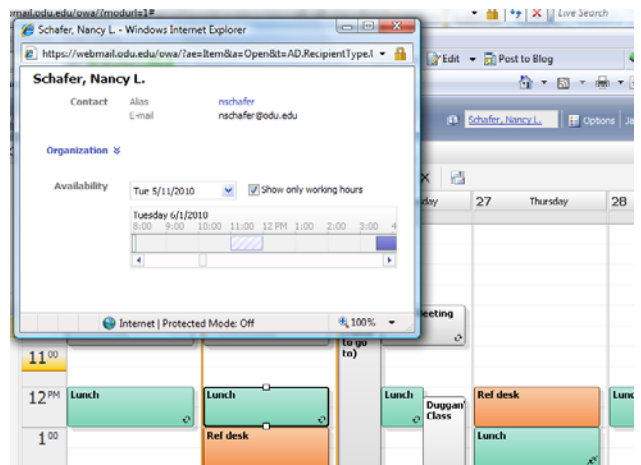
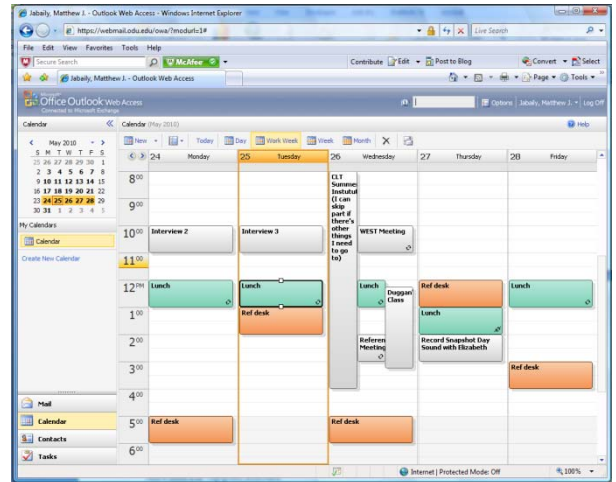
Web Version

The web version of Outlook is not as robust as the desktop version, but it is still useful for checking and scheduling appointments. When using Outlook Web, it is a good idea to use Internet Explorer, as it will look better and work better than if you use Firefox or another browser. To access your mail and calendars, go to <http://mail.odu.edu> and log in with your email username and password.

You'll notice that you have more options than in typical web interfaces; for example, you can drag and drop appointments to different times. You can also double click on a record to edit details. You cannot, however, copy and paste appointments.

You can use the search box in the top right corner (that says "Find Someone") to look up the availability of another person. You cannot, however, see what appointments they have (only if they are marked as busy or not).

If you need the full functionality of Outlook from a home computer or laptop and own Microsoft Office 2007, you can configure your work account using instructions from OCCS (see link below).



Advanced Applications

This workshop only scratches the surface of the functionality of Outlook Calendars. For example, you can program your smart-phone to automatically sync your calendar, allowing you to access and modify your calendar from anywhere. If you have questions or need help getting setup, feel free to ask or email me at mjabaily@odu.edu

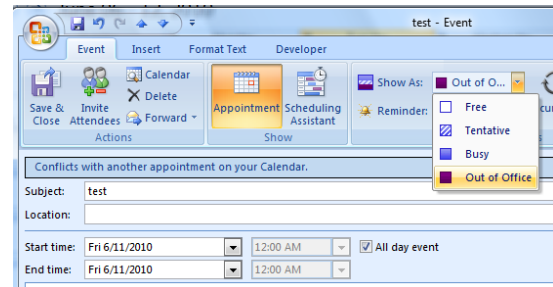
You can also find links to helpful Outlook materials from the OCCS page: http://occs.odu.edu/projects/exchange/ex_training.shtml

Outlook Calendar Follow-Up

Thanks to all who participated in the Oracle Calendar staff developments. Special thanks to those who taught me something new about the calendars. This handout is a supplement to the staff development, and it contains new things I learned during the sessions and details about some of the features people asked about during the sessions.

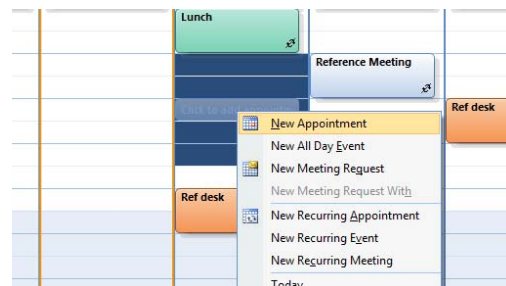
Out of Office

When you schedule an appointment, your status typically defaults to “busy.” If you are going to be out of the office, however, it may be helpful to mark this in your calendar. Open an appointment and you’ll see a dropdown box next to “Show As:” From there, you can select out of office. If you are going to be gone all day, you can mark the “All day event” box to the right of the start time. If you mark an all day even and display it as “Out of Office” you will appear in the scheduling assistant as unavailable for the entire day.



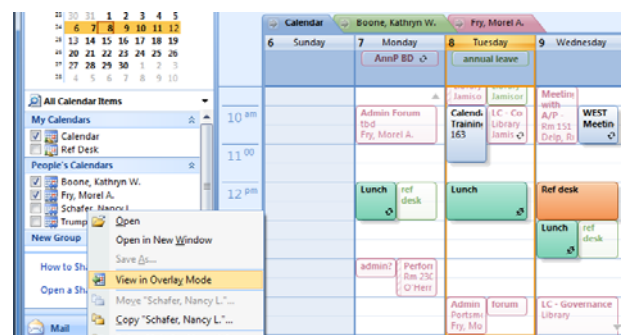
Scheduling a Meeting for More than a Half Hour

Whenever you double-click a spot on the calendar, Outlook assumes you want a half hour meeting. You can, of course, adjust the time later. If you’d like, however, you can set proper meeting duration in one step. Simply highlight the range of time for which you’d like to schedule the meeting. Then, right click the highlighted area and select “New Appointment.”



Viewing Multiple Calendars in Overlay Mode

During the second session, several people expressed an interest in overlaying multiple calendars on top of one another. First, make sure that you have permission to view the person’s calendar and that it is listed in your “People’s Calendars” area. Then, right click on the person’s calendar and choose “View in Overlay Mode.” You can choose to overlay several calendars in this way, and each will have its own color for appointments. You can select the tabs at the top of the calendar to bring

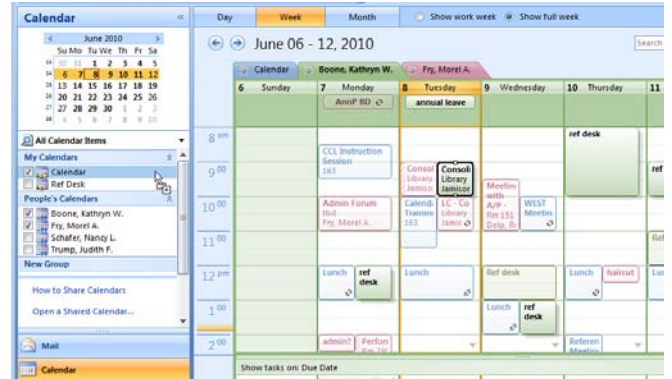


one person's schedule to the top (the other people's calendars will be ghosted).

Copying Appointments from Other People's Calendars

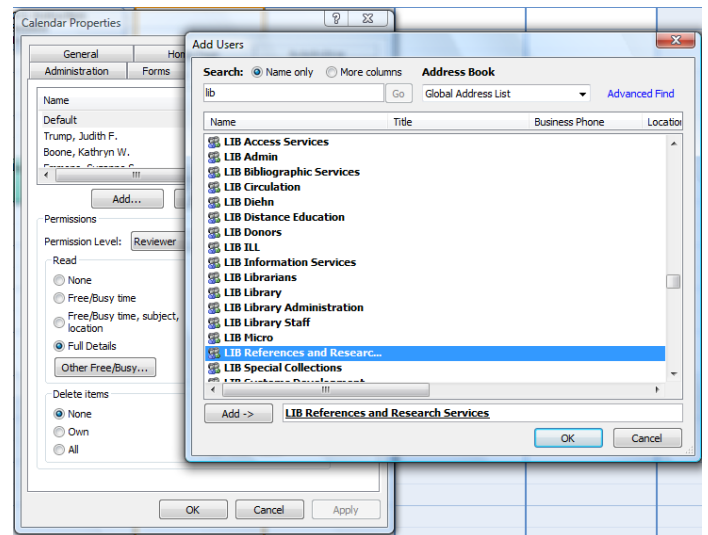
Let's say you're looking at a colleague's calendar and you see an appointment that you'd like to add to your own calendar. You can add a copy of that appointment by selecting the event on the calendar and dragging it to your own calendar (on the left side of the screen, listed under "My Calendars").

Note that if the appointment is one that is scheduled for several people, you won't receive updates about the appointment. In some cases, it may be better to ask the person who scheduled the meeting add you to its list of attendees.



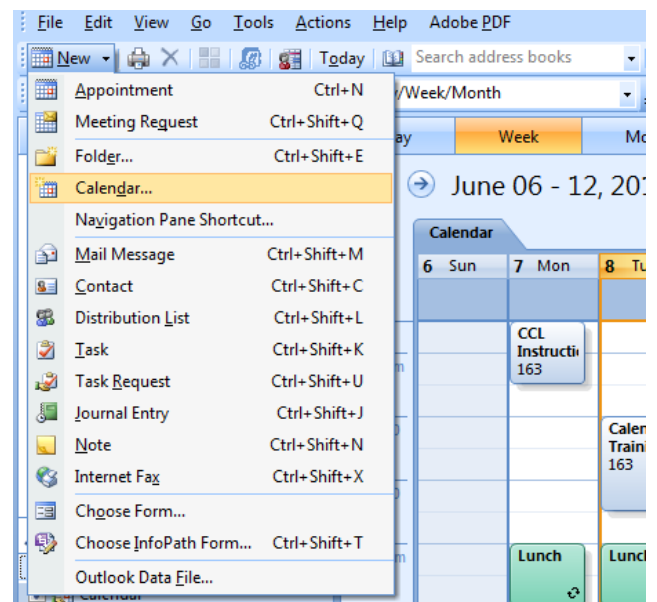
Sharing your Calendar with Groups/Lists

You may want to make your calendar visible to a specific group of people, instead of the campus as a whole. To do this, right click on your calendar listing (on the left side of the screen) and choose "Change Sharing Permissions..." Then, click the "Add..." button. In the search box, type in "lib" and you will see a list of all the library mailing lists. Highlight the one you want, click the "Add ->" button, and press the "OK" button. Then, choose the "Permission Level" for the group (probably "Reviewer") and press "OK" again.



Creating Additional Calendars

You can have more than one calendar if you want. To create a new calendar, click on the triangle arrow on the "New" button in the top-left corner of the screen. Then, select "Calendar..." and give the new calendar a name. This new calendar can be shared in the same way as your regular calendar. You can configure the calendar so that several people can view, add, and delete appointments, making it a useful collaboration tool.



Creating and Viewing Group Schedules

If you are a member of a group that meets regularly, it may be useful to create a group schedule. This way, you will be able to view everybody's schedule quickly, without having to enter names in individually.

In the "Actions" menu you can choose "View Group Schedules..." Next, you will create a group by clicking the "New..." button. You will be asked to give the group a name.

Next, you will add names to the list. You can input these names individually, but it may be faster to add a list. Click the "Add Others..." button and choose "Add from Address Book..."

You can then type "lib" into the search box to see the library groups. Choose the one you want and press the "To ->" button and then press "OK." (Individuals can also be added this way.)

By default, the schedule for the group as a whole will be displayed (if any person is busy, the whole group will be marked as busy). You can click on the + button to the left of the list to view the individuals in that list. You can then add or delete individuals you want. When you are finished, click the "Save and Close Button." You can now view this set of schedules at any time by choosing opening the "Actions" menu and choosing "View Group Schedules..."

