



# Software Application Tutorial

## Microsoft Outlook Calendar 2010



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**For Assistance Call x3350**

**A Member of the Pennsylvania State System of Higher Education.**

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# INTRODUCTION

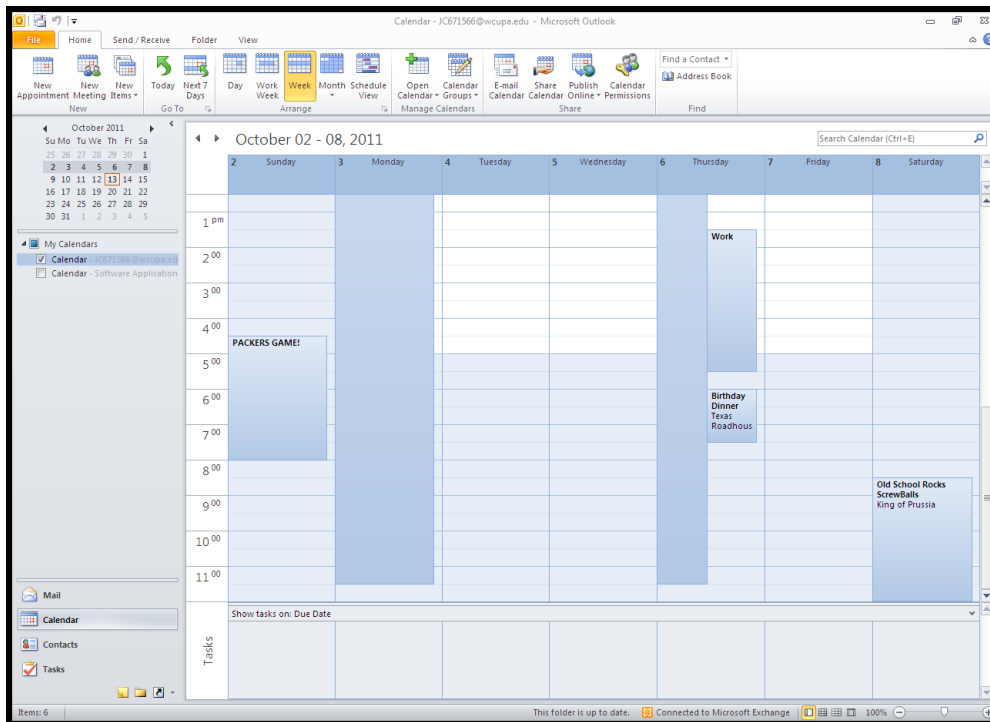
Like electronic mail, a computer-assisted appointment book can become an indispensable tool for today's workgroup member. Manual appointment systems are inefficient, take too much time, and frequently cause people to resort to keeping multiple calendars.

Outlook Calendar provides excellent tools for managing appointments and events on your schedule. Outlook calendar is also specifically designed to correlate with your workgroup. It interacts closely with the Mail system, so Mail system users can share schedules and access copies of schedule information.

You can authorize various levels of access to different users, providing security to your shared schedules. These access levels permit others to:

- Create appointments for you
- View your appointments
- See whether you are busy at certain times, viewing only your availability minus the details.
- See nothing at all

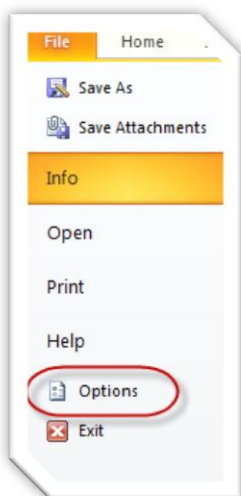
The main calendar window



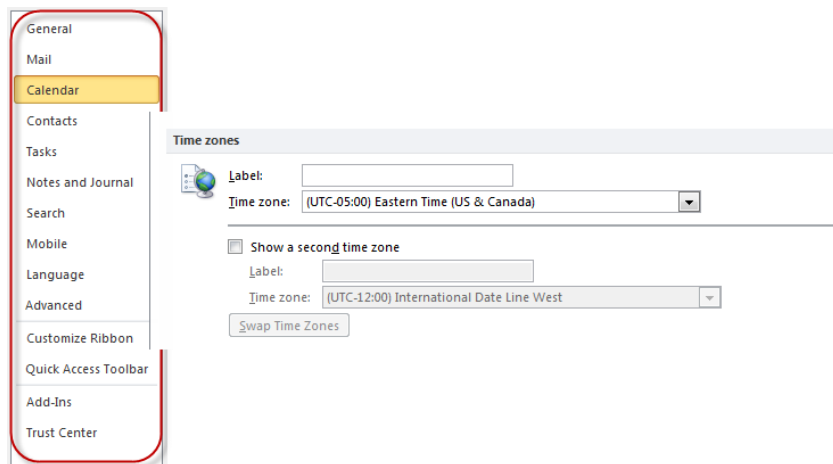
## NEW FEATURE IN OUTLOOK CALENDAR 2010

A cool new feature in Outlook Calendar 2010 is the ability to change time zones to match your current geographic location. When the time zone is changed, this is the same as changing the time zone in Control Panel in Windows. When you change the time zone setting in Outlook 2010, all Calendar views are updated so that they display the new time zone, and all Calendar items reflect the new time zone.

1. **Click the File tab.**
2. **Click Options.**

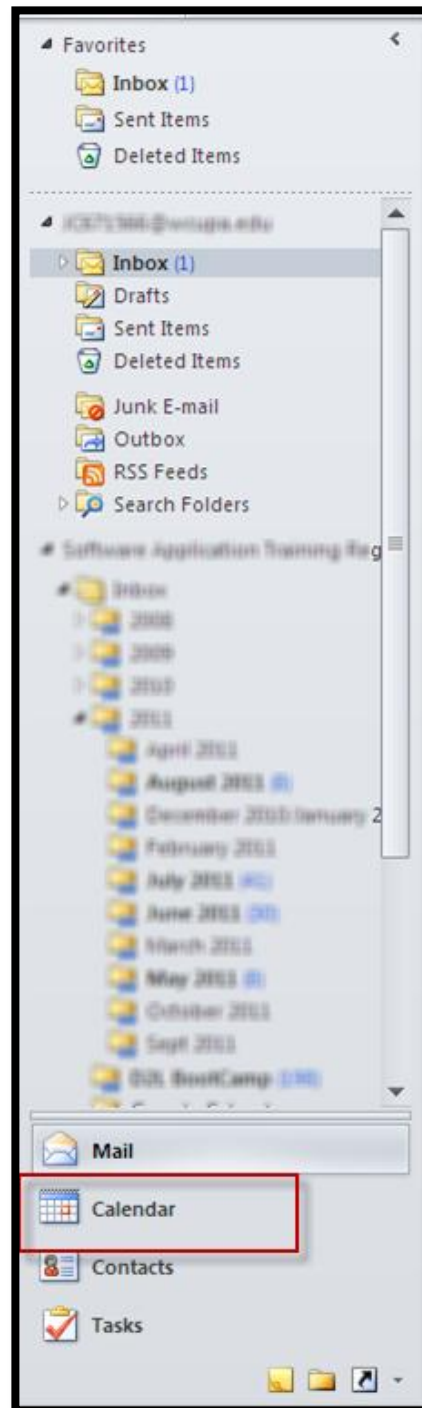


3. **Click Calendar** in the Outlook Options window.
4. Under **Time Zones**, type a name for the current time zone in the **Label** box.
5. In the **Time zone** list, click the time zone that you want to use.



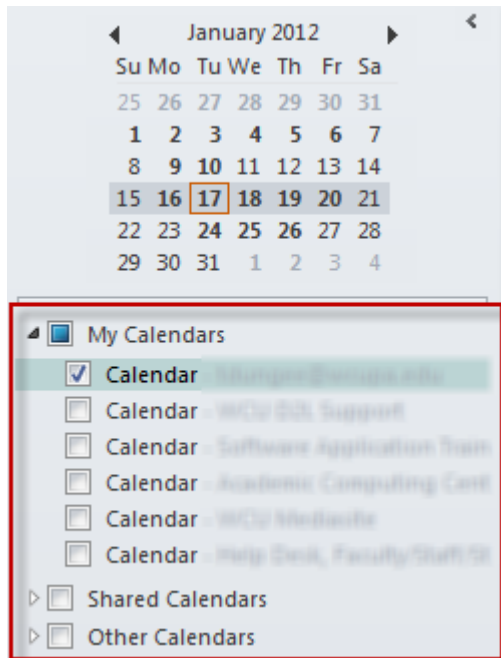
## HOW TO ACCESS YOUR CALENDAR IN OUTLOOK

Your calendar is found in your Outlook program. You must log on to Outlook to access your calendar.

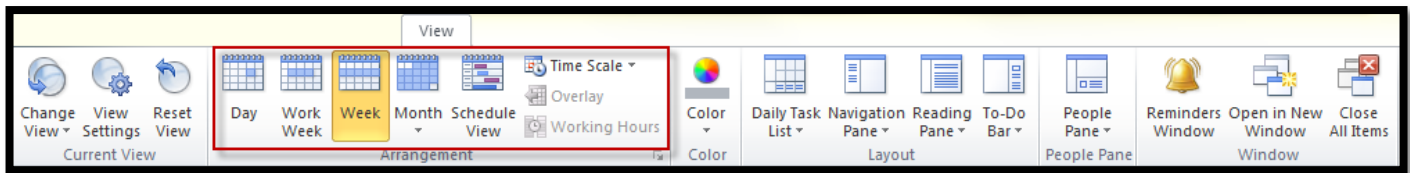


## CALENDAR VIEWS

1. From the Navigation Pane, select the calendar you would like to view.



2. Click the **View** tab to see all the default calendar views.

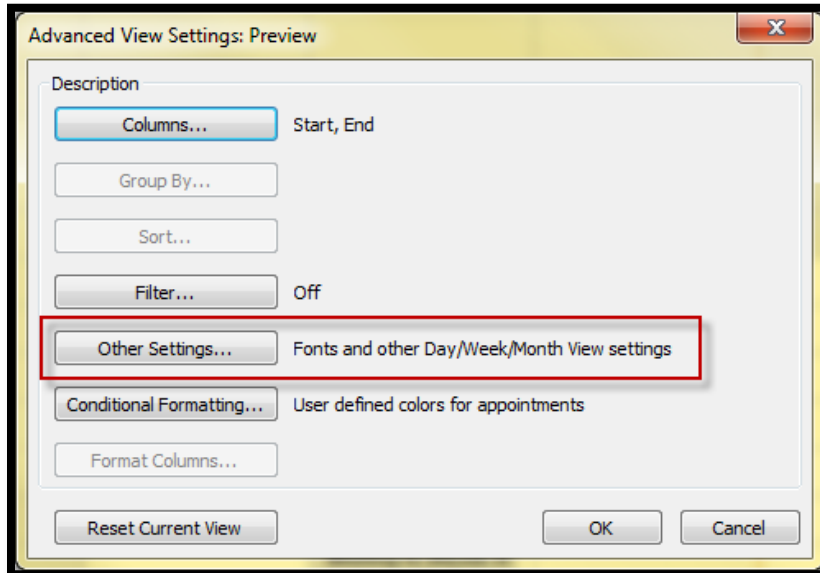


3. **Select** a view to apply it to your calendar.
4. Current View will appear under “My Calendars” and will be highlighted a specific color

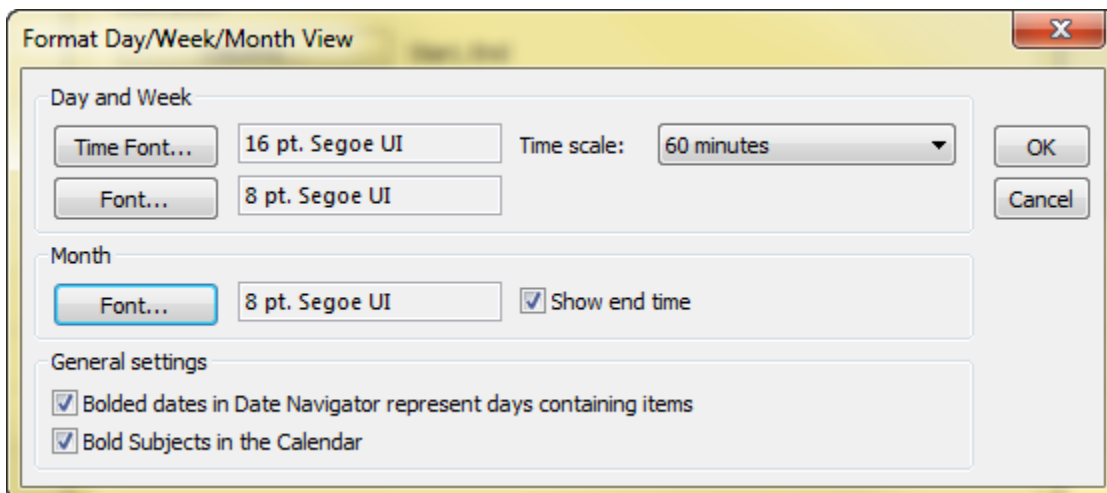
- **Changing the Font Size of Your Calendar**

If you are having difficulty reading the font in your Calendar because it is too small you can change it to a larger font.

1. **Click the View tab.**
2. In the Current View group, **click View Settings.**
3. In the Advanced View Settings box, **click Other Settings**



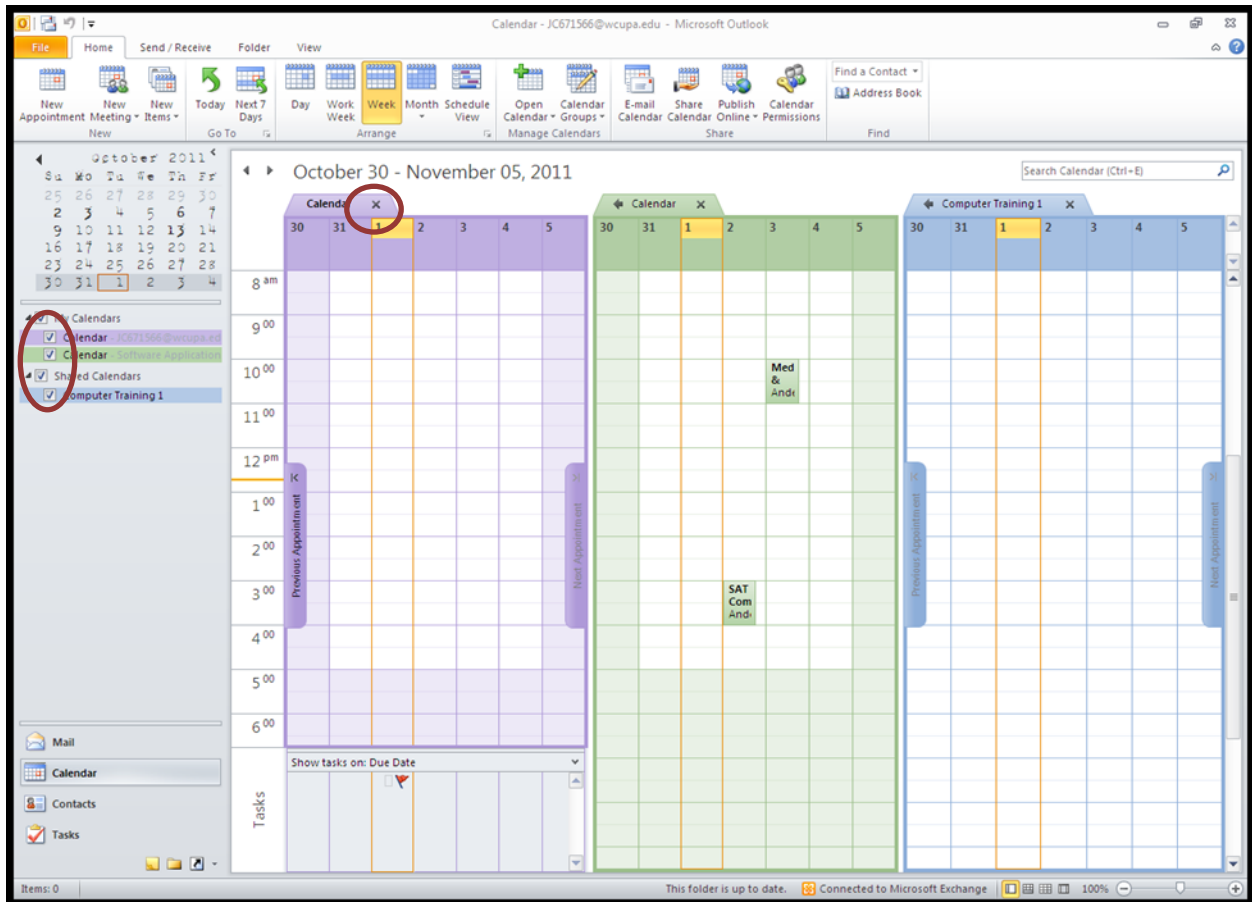
4. Make your font changes, **Click OK**



## Calendar Sharing

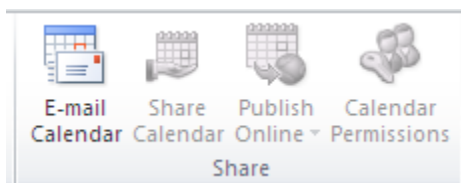
Sharing your calendar and viewing multiple calendars at once is a snap. Click on the calendar icon located on the Navigation Pane and get ready to experience the ease of application like never before.

From this window you can open and view other user's calendars (once permission has been granted) within the same window. Notice how each calendar is represented in a different color. To close these calendars, locate the calendar in the Navigation Pane, and uncheck the box to the left of the calendar or click the x on the calendar.

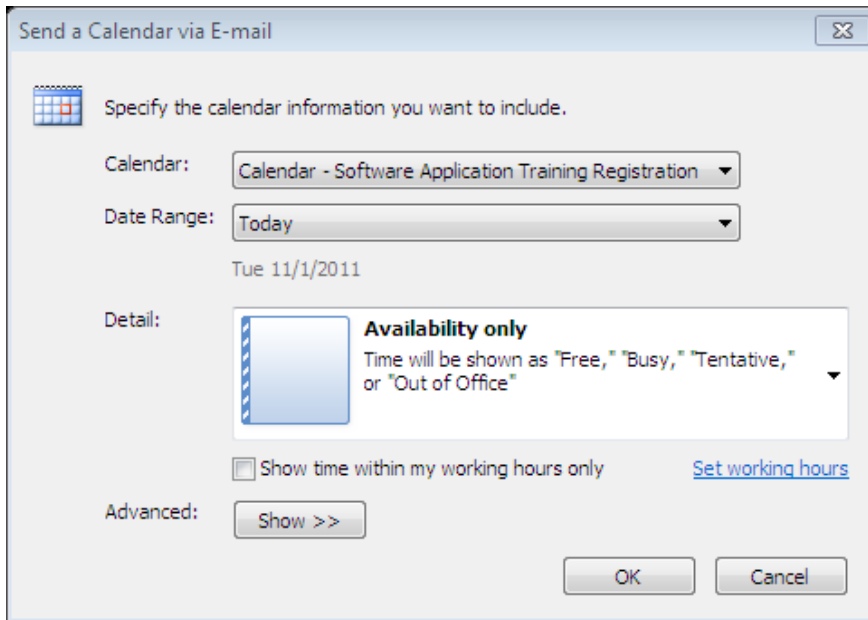


- **E-mail Calendars**

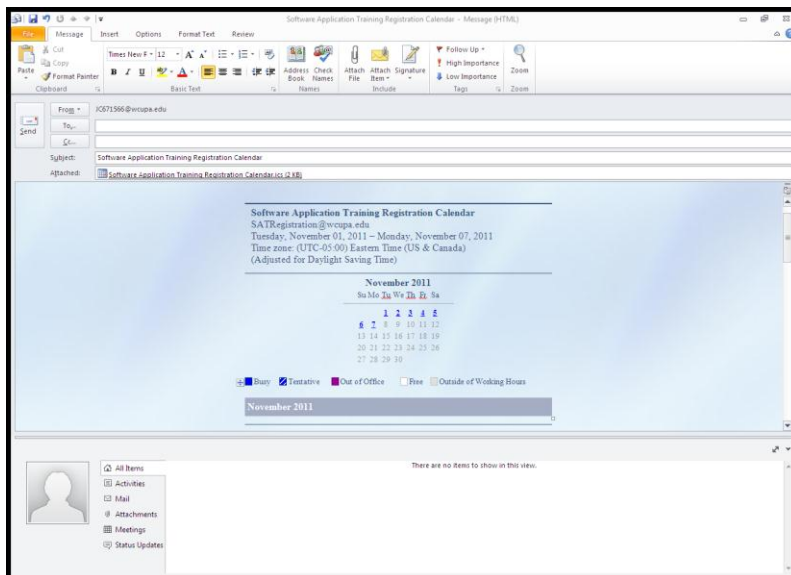
1. Click on the Home tab and in the Share group, click E-mail calendars



2. In the Send Calendar window specify the calendar information you want to include.



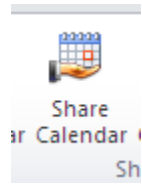
3. Once you select what you'd like to send, it will condense the calendar into an e-mail.



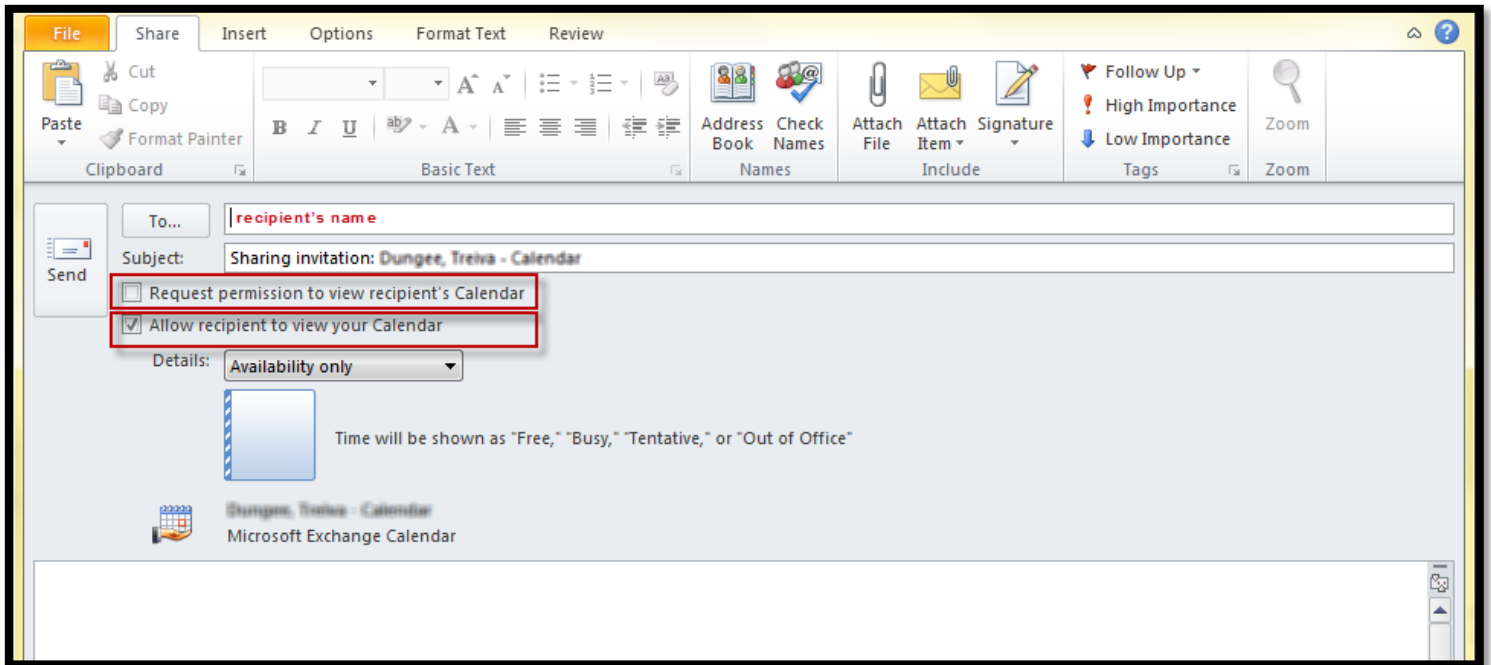
4. Type the recipient's name in the To.. line and **click send**

- **Sharing Your Calendar**

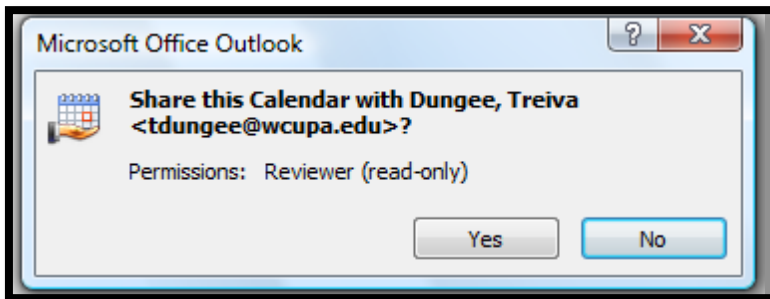
1. **Click the Home tab** and in the Share group, **click Share Calendar**.



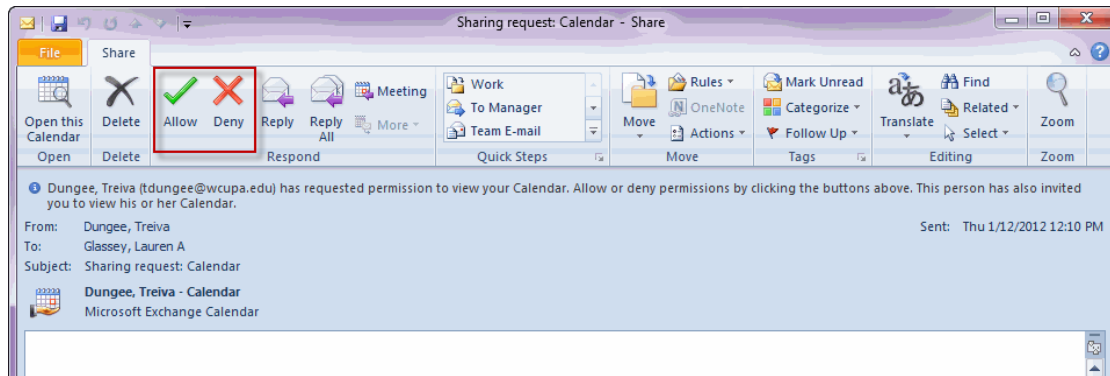
2. The following email automatically opens, enter the recipient's name in the To.. line.



3. If you would like to access the recipient's calendar click in the box next to Request permission to view recipient's Calendar.
4. **Type a message**, if you wish, and **click send**. The following window will appear, **click Yes** to send.

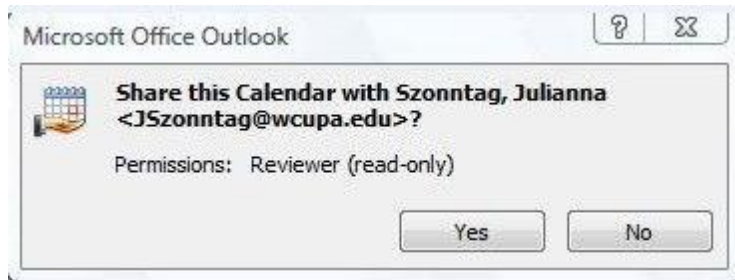


5. The recipient will receive the following email



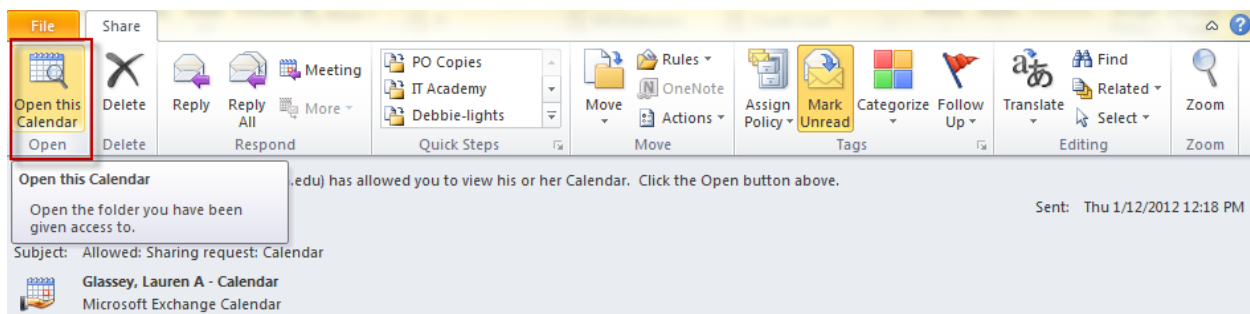
6. The information bar located under the Ribbon explains the email and how the recipient should respond. Here the recipient decides whether to allow or deny the request.

7. After clicking on Allow or Deny the following window appears.



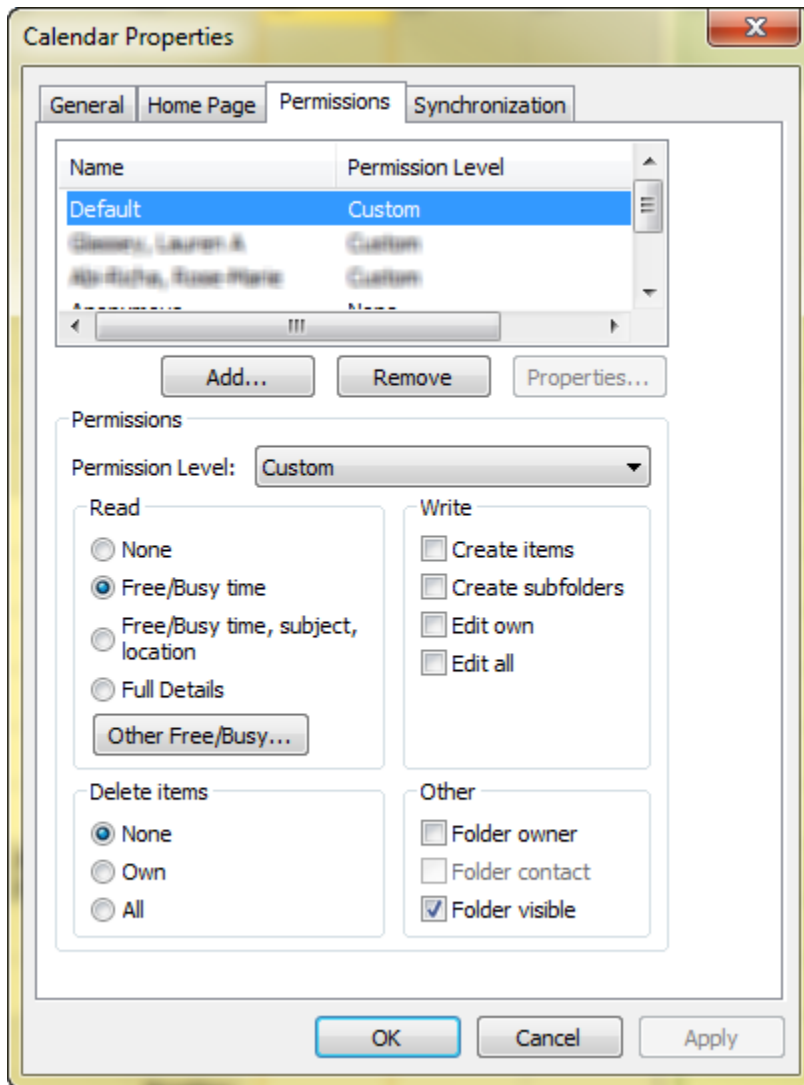
8. The recipient clicks Yes and a message is automatically sent to the person requesting permission to view the calendar. The information bar contains the response.

9. **Click Open this Calendar** and the person's calendar opens and their name appears in the Navigation Pane under Shared Calendars



- **Assigning Permissions to Your Calendar**

1. Open the Home tab and **select Calendar Permissions** located in the Share group.



2. **Select a Name** to change their permissions.
3. Under Permissions, select an already established permission level or customize the permissions.
4. **Click OK.**

## Permission Levels

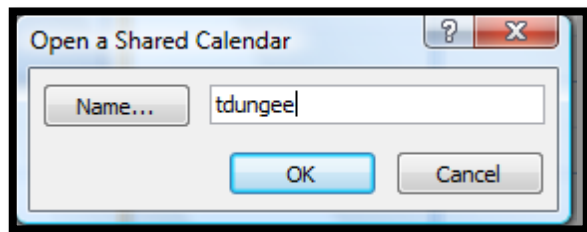
None	The person cannot see any information related to your calendar
Free/Busy time	The person can see when you're free or busy
Free/Busy time, subject, location	The person can see the time, subject, and location of your appointments
Contributor	The person can put appointments on your calendar but cannot see details of existing appointments
Reviewer	The person can read everything related to an appointment (except a private one) and see folders, but not subfolders
Nonediting Author	The person can see appointment details, create appointments (but not folders), and delete the appointments they created
Author	The person can see appointment details, create appointments, edit appointments they created, and delete appointments they created
Publishing Author	The person can do everything an Author can, plus create subfolders
Editor	The person can create items, edit all appointments, delete any appointment, and see the full details of all appointments
Publishing Editor	The person can do everything an Editor can, plus create subfolders
Owner	The person will have the same permissions to your calendar that you have

**Note:** You can also grant access to your calendar from the Calendar Properties window.

- a. **Click Add**
- b. Locate the person you are granting access rights to from the Global Address List, highlight the name with a mouse click, and then **click** the **Add** button (note you can add multiple people from this window).
- c. **Click OK.**
- d. Assign the appropriate calendar privileges

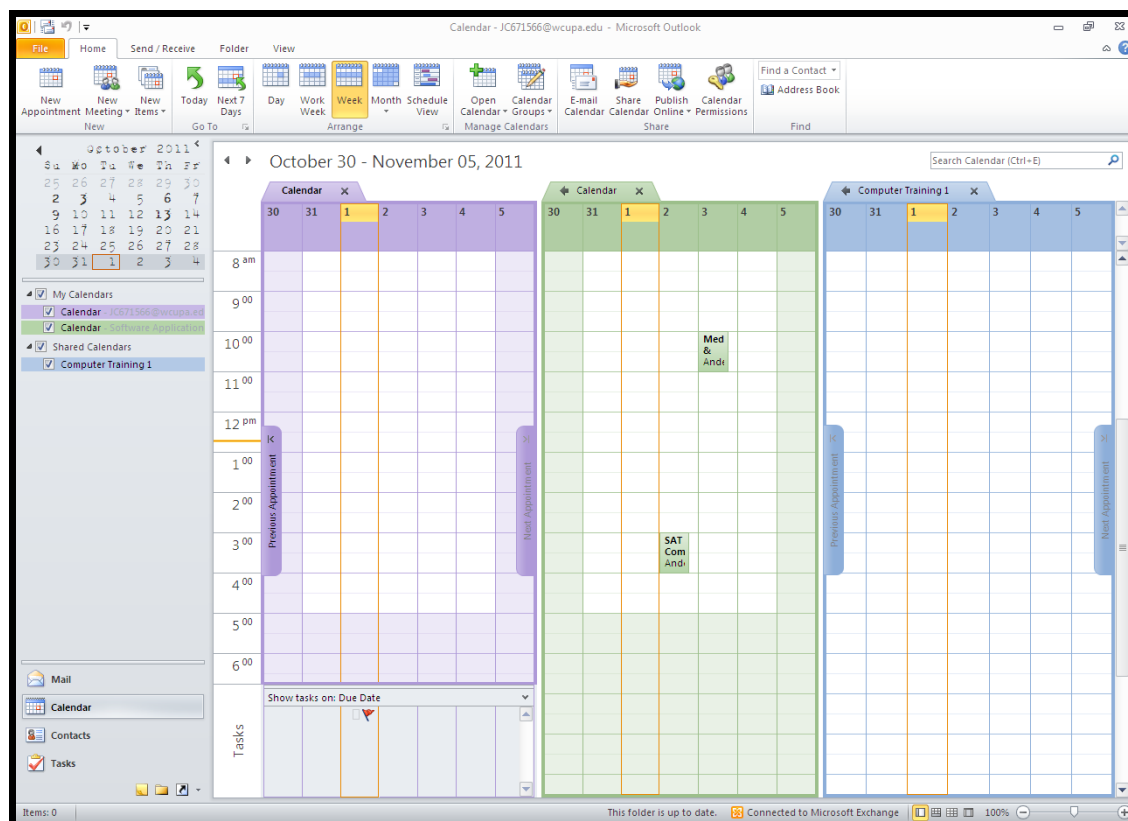
## VIEWING ANOTHER CALENDAR

1. Click the **Calendar icon** located at the bottom of the Navigation Pane.
2. Click the **Home tab** and in the Manage Calendars group **select Open Calendar**
3. **Select Open Shared Calendar**
4. Type the user's name in the Open a Shared Calendar window or click Name and search the Global Address book.



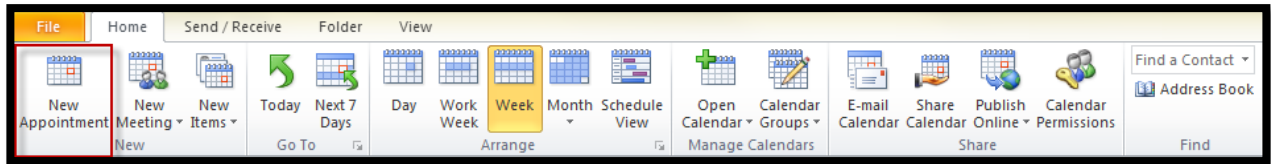
5. **Click OK.**
6. The user's calendar will open in your Calendar window.

**Note:** Outlook 2010 allows you to view several calendars in the same window at once. To distinguish between calendars, Outlook assigns a different color to each calendar. To close the calendar, simply uncheck the box next to the calendar.



# SCHEDULING APPOINTMENTS

1. On the Home tab, **Select New Appointment**



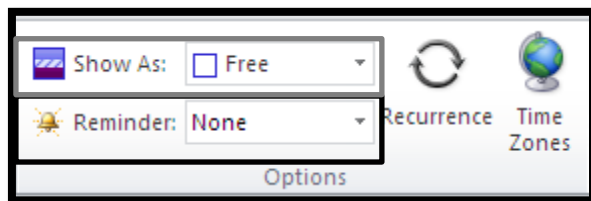
2. Enter a subject and or location for this appointment in the following boxes.

A screenshot of the appointment scheduling form. It shows two input fields: 'Subject:' and 'Location:'. The 'Subject' field is a text box, and the 'Location' field is a dropdown menu. Both fields are currently empty.

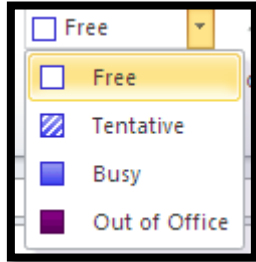
3. Enter a start time and date and an end time and date for the appointment. If it is an all day event, check the ALL DAY EVENT box.

A screenshot of the appointment scheduling form showing the time and date selection fields. The 'Start time:' field has a date dropdown set to 'Thu 11/3/2011' and a time dropdown set to '8:00 AM'. The 'End time:' field has a date dropdown set to 'Thu 11/3/2011' and a time dropdown set to '8:30 AM'. There is an 'All day event' checkbox which is currently unchecked.

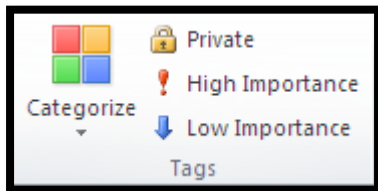
4. If you would like a reminder for the appointment, you must click the Reminder box (located on the Ribbon) and indicate how many minutes before the appointment you would like to be reminded. Fifteen minutes is the default time. **Click the down arrow next to the time indicator window** to select a different time (outlined here in black).



5. You can also record how your appointment should be displayed: Free time, Tentative time, Busy time or Out of Office. **Click the down arrow** (see picture in step 4) next to Show As to choose which of these best suits your appointment.



6. If you would like to have this appointment marked as private **click Private**



7. Once you have all your desired options for your appointment, **click Save and Close.**

- **Scheduling Recurring Appointments**

1. Follow all steps for creating an appointment (directions in previous topic).
2. **Click Recurrence** in the Options group:

The following dialogue box will appear:

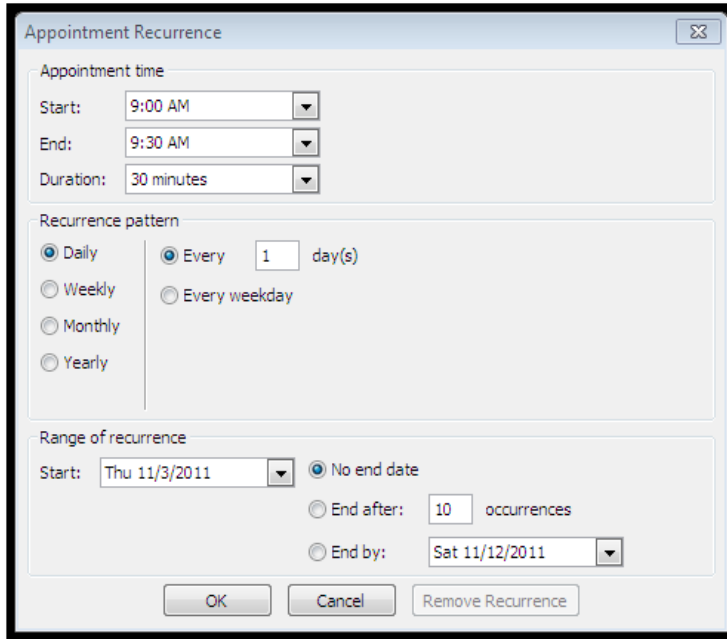
The screenshot shows the 'Appointment Recurrence' dialog box. It is divided into three main sections: 'Appointment time', 'Recurrence pattern', and 'Range of recurrence'.  
- **Appointment time:** Start is set to 8:30 AM, End is 9:00 AM, and Duration is 30 minutes.  
- **Recurrence pattern:** The 'Weekly' radio button is selected. The recurrence is set to 'Recur every 1 week(s) on:'. The days checked are Thursday, Sunday, Monday, Tuesday, and Wednesday. Friday and Saturday are unchecked.  
- **Range of recurrence:** The start date is 'Thu 11/3/2011'. The 'No end date' radio button is selected. The 'End after' option is set to 10 occurrences. The 'End by' date is 'Thu 1/5/2012'.  
At the bottom, there are three buttons: 'OK', 'Cancel', and 'Remove Recurrence'.

3. Choose a start time and end time.
4. Choose recurring pattern.

**Example:**

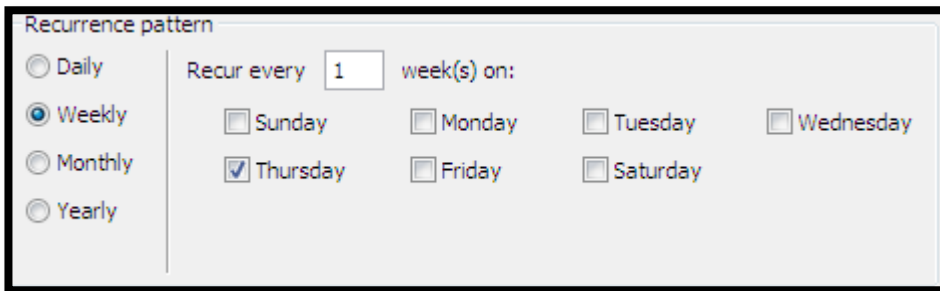
**DAILY:** if it is a daily occurrence **select Daily** under Recurrence pattern.

- a.) Select every day(s) and enter the number of days per week you would like the appointment to occur.
- b.) Or select Every Weekday for the appointment to occur on a daily basis.



**WEEKLY:** if the appointment is a weekly recurrence click on Weekly under Recurrence pattern.

- a.) Next choose the day of the week you would like the weekly appointment to occur.
- b.) Indicate the weekly occurrence by entering a number in the Recur every week(s) box (i.e. 1 for every week, 2 for bi-weekly, etc.).



**MONTHLY:** for a monthly recurrence, **select Monthly** under Recurrence pattern.

- a.) Next choose the day of the month you wish the recurring appointment to happen by filling in the number next to the Day box.
- b.) Indicate if you want the appointment to occur every month, every two months or every three months, etc. by entering a number in the box next to the text of *every*.
- c.) To select a specific weekday for the recurrence select “The”, and click on the down arrows in the two boxes to make your choice.
- d.) Fill in the frequency of the recurrence in the *of every* box to the right of the two “The” boxes. Remember to click on the down arrows for more choices.

Appointment Recurrence

Appointment time

Start: 9:00 AM

End: 9:30 AM

Duration: 30 minutes

Recurrence pattern

Daily

Day 3 of every 1 month(s)

Weekly

The first Thursday of every 1 month(s)

Monthly

Yearly

Range of recurrence

Start: Thu 11/3/2011

No end date

End after: 10 occurrences

End by: Fri 8/3/2012

OK Cancel Remove Recurrence

**YEARLY:** for a yearly recurrence, **select Yearly** under the Recurrence pattern.

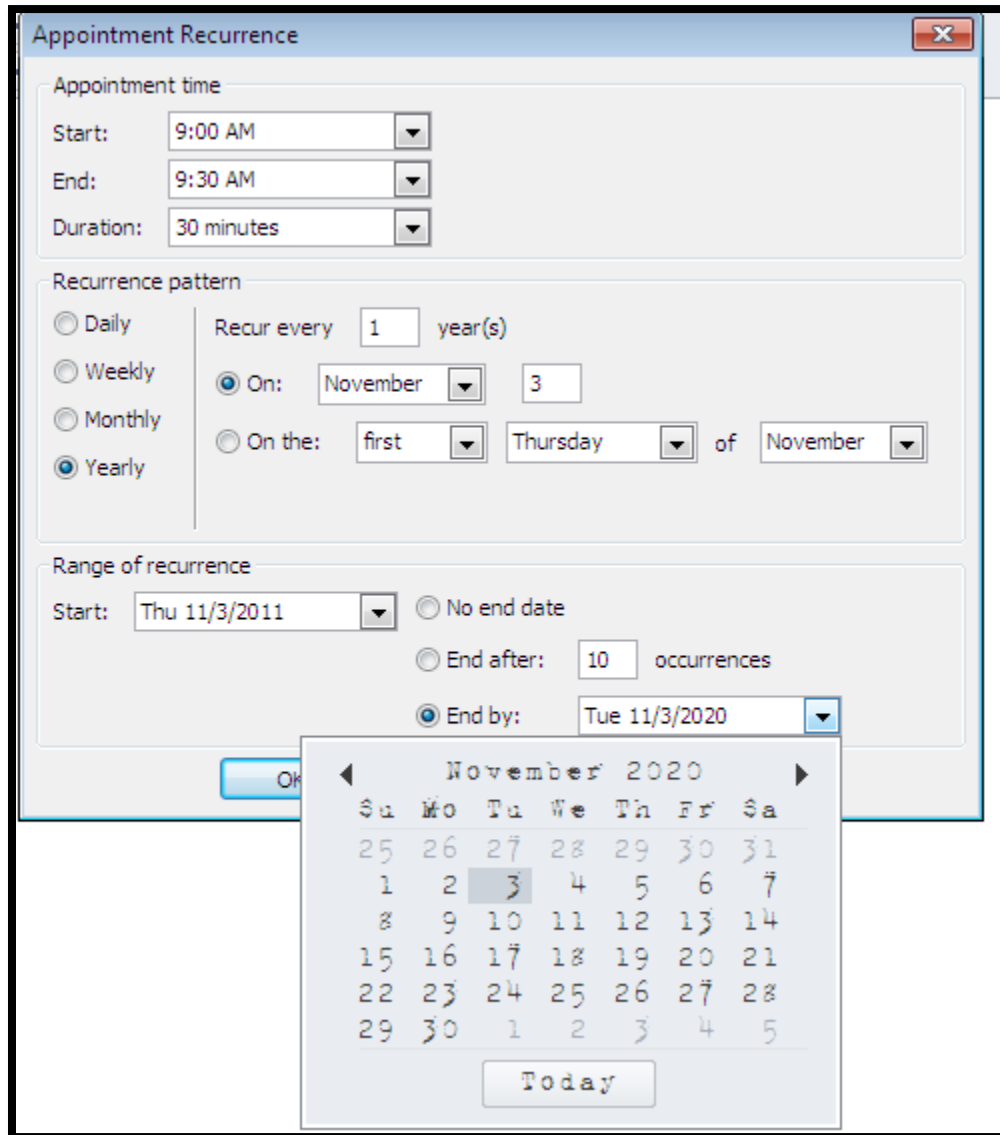
a.) Select how often the appointment is to occur.

The screenshot shows the "Appointment Recurrence" dialog box with the following settings:

- Appointment time:** Start: 9:00 AM, End: 9:30 AM, Duration: 30 minutes.
- Recurrence pattern:** Yearly (selected). Recur every 1 year(s). On: November 3.
- Range of recurrence:** Start: Thu 11/3/2011. No end date (selected).

Buttons at the bottom: OK, Cancel, Remove Recurrence.

5. Select when you would like the appointment occurrence to end.
  - a.) Select no end date if the appointment will be ongoing.
  - b.) Click the end after option and enter the number of times you would like the appointment to occur.
  - c.) Or click the end by option and enter a specific date you would like the appointment to end or click on the down arrow next to the end by box and select a date.

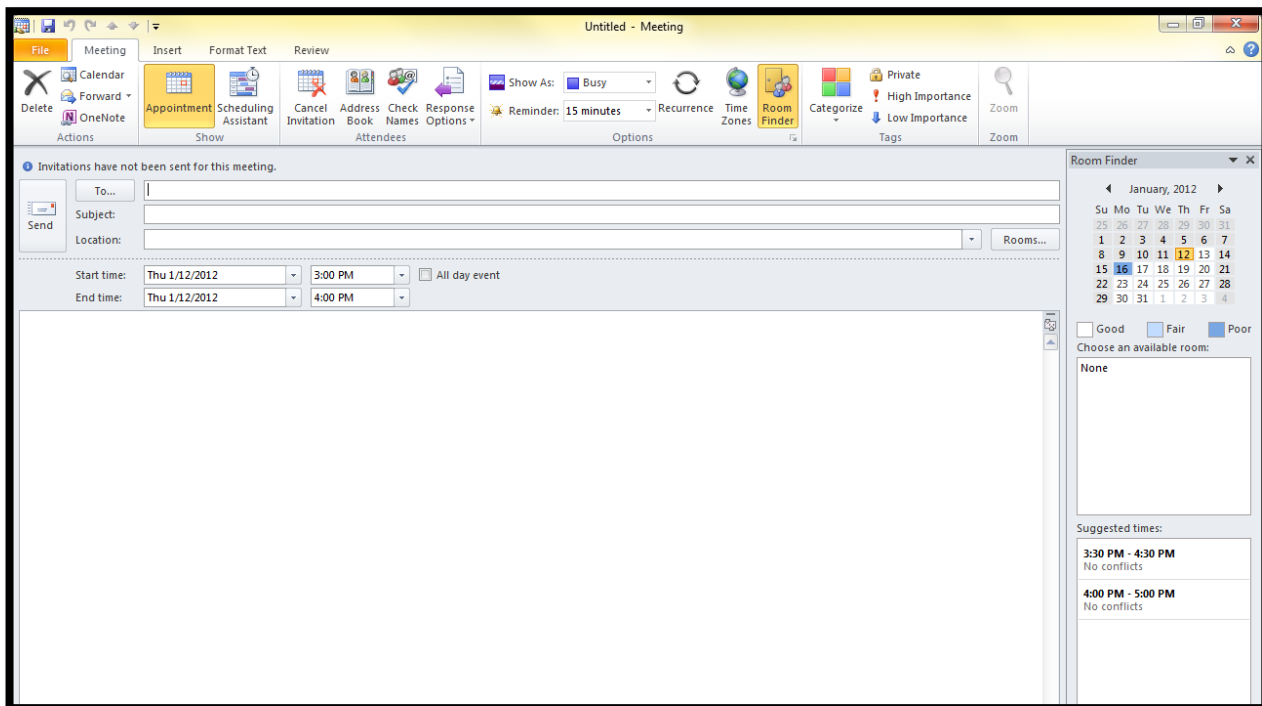


6. Once you have completed these steps, **click the OK button** and this will set your appointment to become recurring. You will notice that any recurring appointment will have a cycle symbol next to the subject.

## SCHEDULING MEETINGS

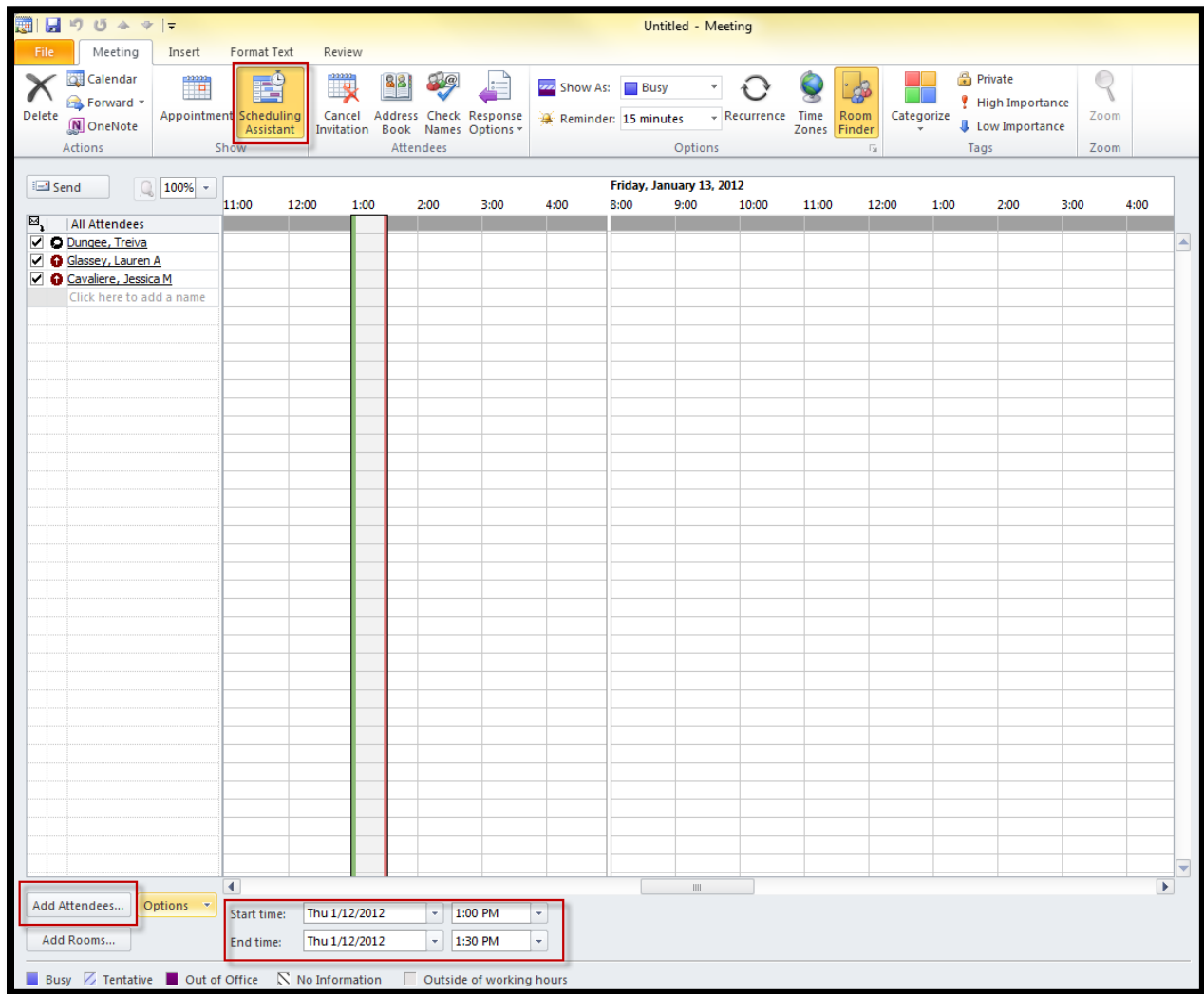
1. On the Home tab, **select New Meeting**.
2. In the Meeting Request window **click the To...button** to add meeting attendees.

**Note:** Resources are inanimate objects such as a conference room, projector, etc. with their own e-mail account.

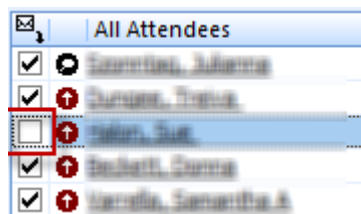


3. Follow the instructions for making an appointment to create the rest of the meeting. (i.e. location, time, recurrence, reminder).


4. **Select Scheduling Assistant** to assist you in scheduling the best time for your meeting.



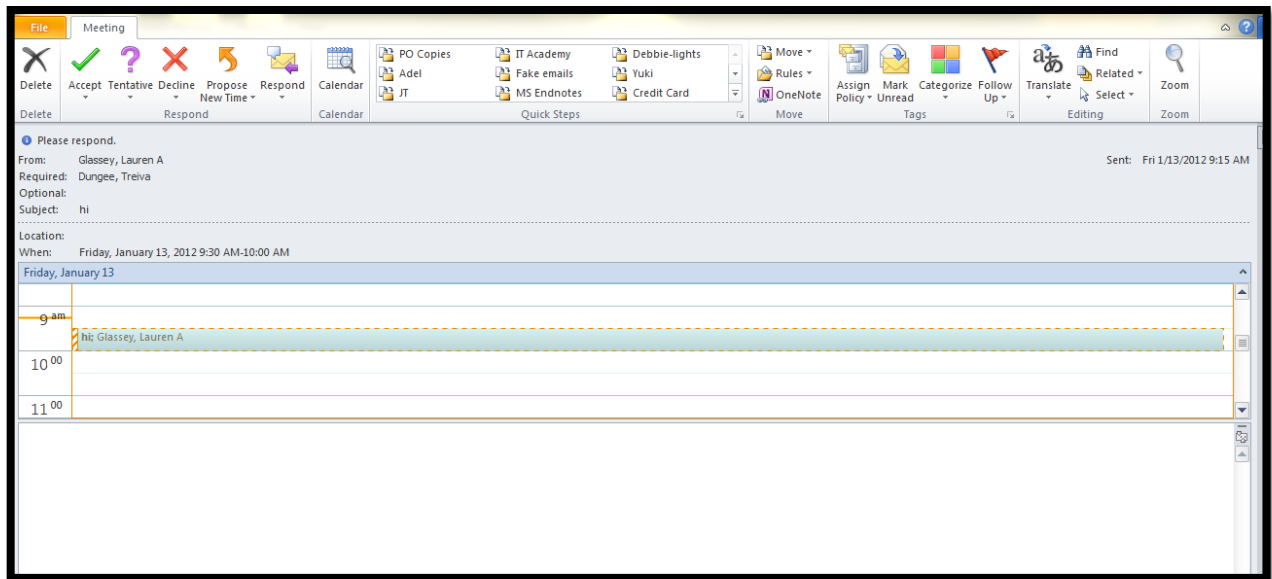
5. **Click Add Attendees** to add names from the Global Address List.
6. **Click OK.**
7. After scheduling a time, location, and adding the attendees, **click the Send** button to send an email to all attendees.  
*If you do not wish to send an e-mail to an attendee, uncheck the box next to the person's name. Only the attendees with check marks will receive an email.*



# RESPONDING TO A MEETING APPOINTMENT

When someone is trying to schedule a meeting with you, he/she issues an invitation in the form of an e-mail. The Meeting Request is identified by the following icon  in the Inbox.

## 1. Open the Meeting Request

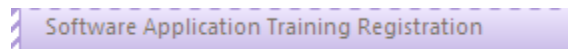


2. Make a meeting selection. When you receive the meeting notice, you have several options. You can accept the meeting request, decline it, book it as a tentative meeting, or propose a new time.

## Responses to Meeting Requests

Response	Effect
<b>Accept</b> - This meeting will be automatically added to your calendar	<ul style="list-style-type: none"> <li>• <b>Edit the response before sending:</b> select this option if you would like to include some comments in the response to the meeting organizer.</li> <li>• <b>Send the response now:</b> select this option if you want the response sent without any comment from you. A default notification will be sent to the meeting organizer.</li> <li>• <b>Don't send a response:</b> select this if you don't want a response to be sent to the meeting organizer.</li> </ul>
<b>Tentative</b> - This meeting will be automatically added to your calendar	<ul style="list-style-type: none"> <li>• See above</li> </ul>
<b>Decline</b>	<ul style="list-style-type: none"> <li>• See above</li> </ul>
<b>Propose New Time</b>	<ul style="list-style-type: none"> <li>• Tentative and propose new time</li> <li>• Decline and propose new time</li> </ul>
<b>Respond</b>	<ul style="list-style-type: none"> <li>• Allows you to reply to the message</li> </ul>

**Note:** Once you have selected either Accept, Tentative or Decline the Meeting Request, the e-mail disappears from your inbox and the meeting is entered into your calendar unless of course if you select decline.

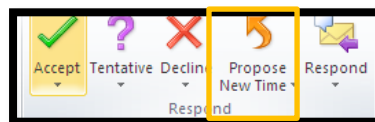


The purple (or blue) and white striped bar to the left of the meeting title indicates that this is a tentative meeting. This is what will appear in your calendar if you open and close the Meeting Request without selecting a response or if you select tentative.

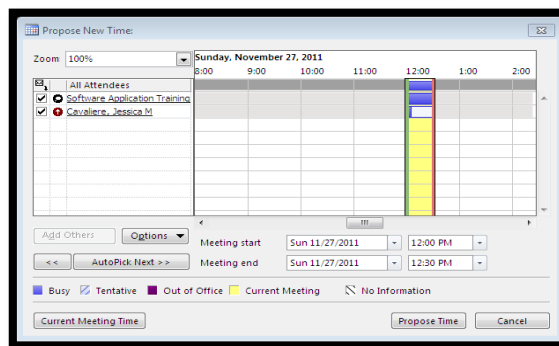
### • Propose New Meeting Time

If you're not the meeting organizer, you can propose an alternative date or time for the meeting.

1. Click the **Propose New Time** box.



2. In the Propose New Time window **select** a new time for the meeting.



3. You can manually select a new time or use **Autopick** to search for the next available time.
4. Once you've changed the meeting time, **click *Propose Time*** located at the bottom of the window
5. A response window will open where you can send a message to the meeting organizer indicating that you have proposed a new time. Notice how the subject box contains the message "New Time Proposed". The Current meeting time and the proposed meeting time are listed below the Subject box.
6. Enter your message and click send.

## **RESCHEDULING OR CANCELLING A STANDING MEETING**

As the organizer, you can change the date or time of a meeting, change other details (such as location) or cancel the meeting altogether.

- **To Reschedule a Meeting**

1. Open the meeting in your calendar.
2. Change the meeting details.
3. **Click Send Update.**

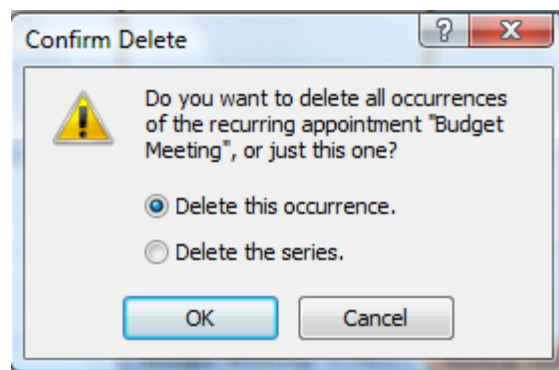
**Note:** An update message looks exactly like the original request. Everyone who receives the meeting request will see the accept, decline and tentative buttons, just as if it were an original meeting request. When you send the Update message, be sure to include text in the body of the email that explains the changes you've made. If you omit this step the attendees may think that this is a duplicate of the original meeting request and fail to notice the changes.

- **To Cancel the Meeting**

1. Open the meeting in your calendar.
2. Click Cancel Meeting, and in the body of the email write your explanation for the cancellation of the meeting.
3. Click Send Cancellation.

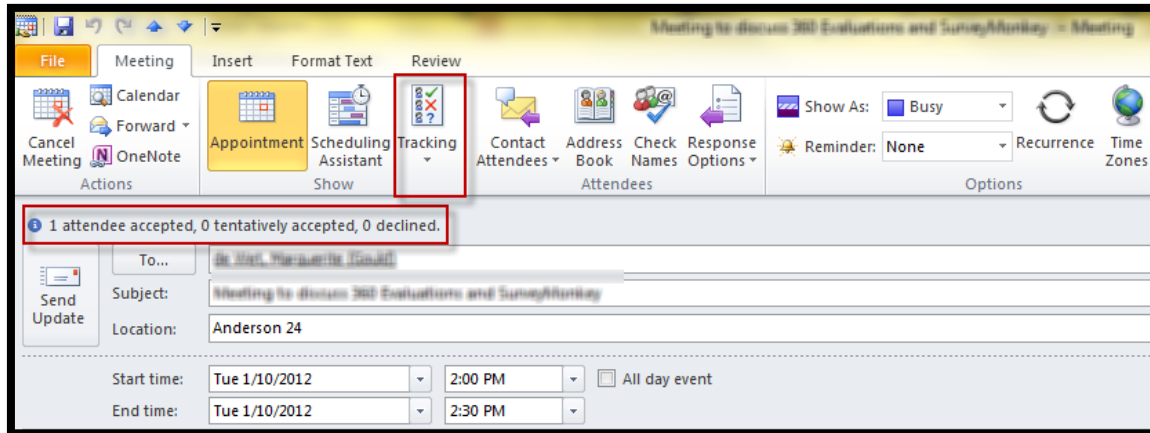
**Note:** Once cancelled the meeting will be automatically removed from your calendar.

If this were a recurring meeting, the following window would open, after selecting Delete, asking if you want to Delete this occurrence or Delete the series.



- **Checking the Status of a Meeting Request**

As the meeting organizer, you can check a meeting's status at any time. Look at the information bar located below the Ribbon to see a running tally of the number of prospective attendees who have accepted, declined, or failed to respond.



For a more detailed view of responses, click the Tracking button. This list lets you see at a glance which invitees have failed to respond to your invitation, allowing you to send a follow-up message quickly, if necessary.

## PRINTING YOUR CALENDAR

Even though there are many options to view your schedule on the screen, there will be times when you will want to print a hard copy. Calendar includes flexible printing options.

To print your appointment schedule:

1. **Click File.**
2. **Click Print.**
3. **Select** the view that you want to print. The options are Daily Style, Weekly Style, Monthly Style, Tri-fold style and Calendar Details style.
4. **Click Print**

**Note:** To change the print range, click Print Options. In the Print Range area, adjust the start and end dates.