

Overview Outlook is a software application that allows you to electronically manage your time and your communication. The four main features of Outlook are Mail, Contacts, Calendar, and Tasks.

Audience All staff

Length 2 hours

Objectives

After this class participants will be able to: *pg*

- Access the Calendar and change the view2
- Explain and identify the differences between an appointment, a meeting, and an all-day event.....3
- Initiate a new meeting request at least one of three ways4
- Name the three basics elements of a meeting request.....5
- List the two categories of attendees5
- Identify the icons for the different elements5
- Add attendees and resources to a meeting request.....6
- Check availability of attendees and resources7
- Complete the details of a meeting request and send it.....7
- Write an effective agenda.....8
- Explain how Outlook processes meeting requests. [SELF-STUDY]9
- Name the four types of responses to a meeting request11
- Accept or Propose a New time for a meeting12
- Tentatively accept or Decline a meeting.13
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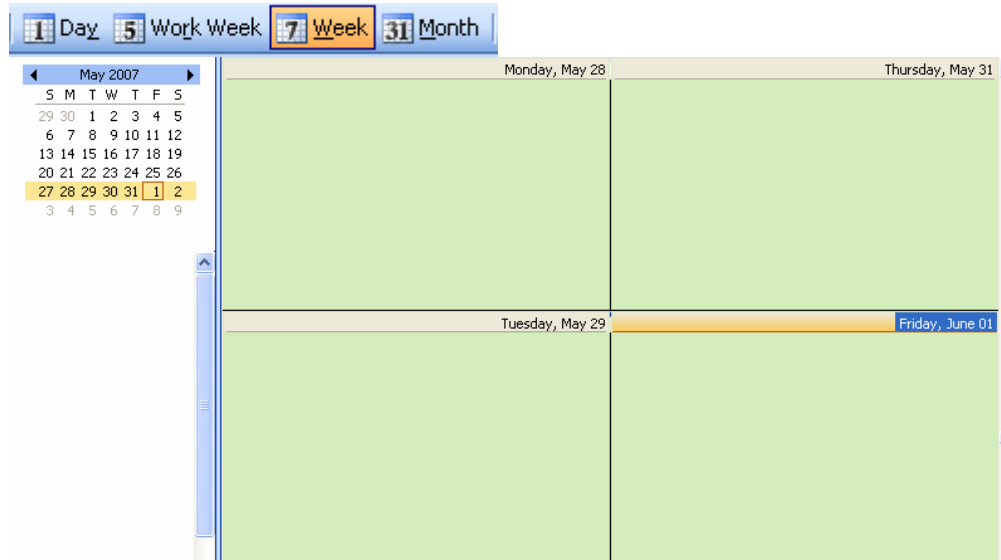
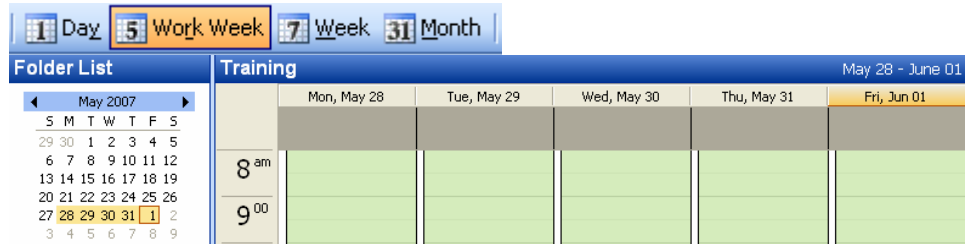
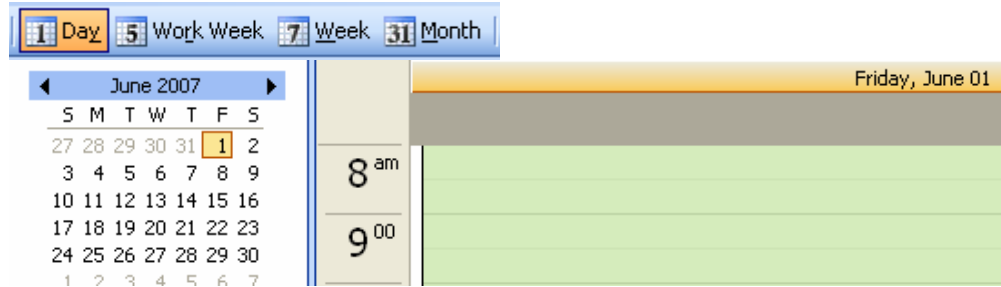
Access the Calendar

1. If necessary, launch **Outlook**.
2. Click **Calendar** in the **Navigation** pane.

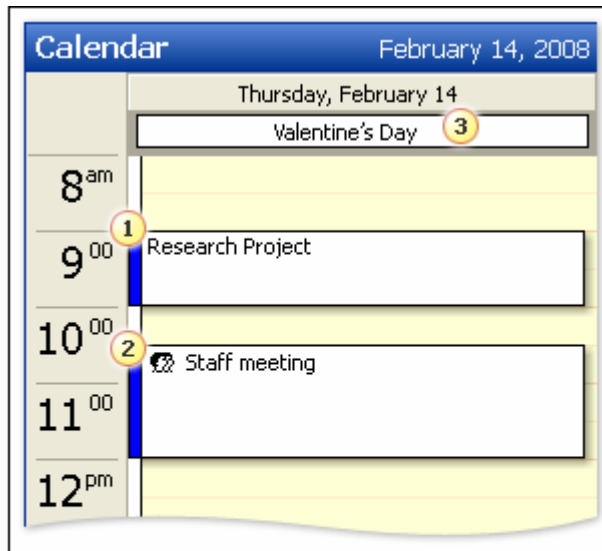


Change the Calendar view

Click the button of the corresponding view.



The differences between an appointment, a meeting, and an all-day event



- 1 An appointment.
- 2 A meeting.
- 3 An all day event.

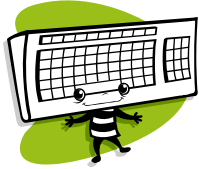
An **appointment** is an activity that involves only you.

A **meeting** is similar to an appointment. The difference is that you invite other people to it.

An **all-day event** is an activity that lasts all day long but doesn't block out time in your **Calendar**. With an event, you can still have other items appear in your schedule for that day.

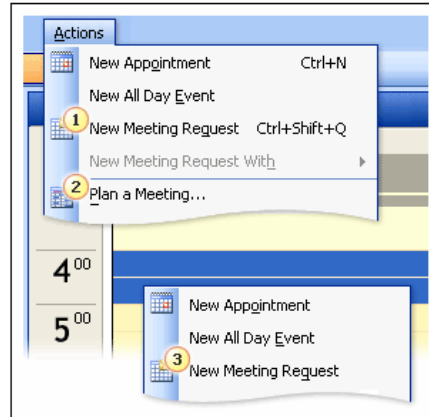


Initiating a Meeting Request

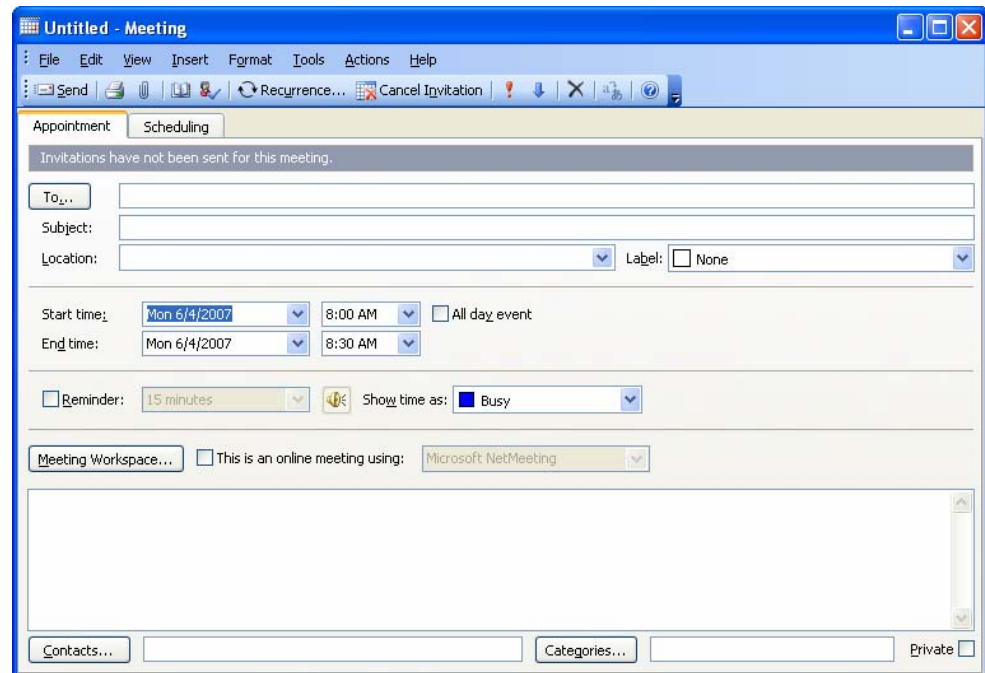


CTRL+SHIFT+Q

There are a few different ways to start your meeting request depending on what your goal is.



- New>Meeting Request**
 This method gives you a blank slate for the meeting and starts you off in the **To** box of the meeting request. When you use this method, you'll need to fill in all of the meeting details yourself.
- Actions>Plan a Meeting**
 Use this method when your first goal is to find a time that's free in everyone's schedule.
- Right-click a selected time slot>New Meeting Request.**
 Use this method to book the meeting at a specific time. Selecting the time first allows that part of the request to be filled in when it opens.



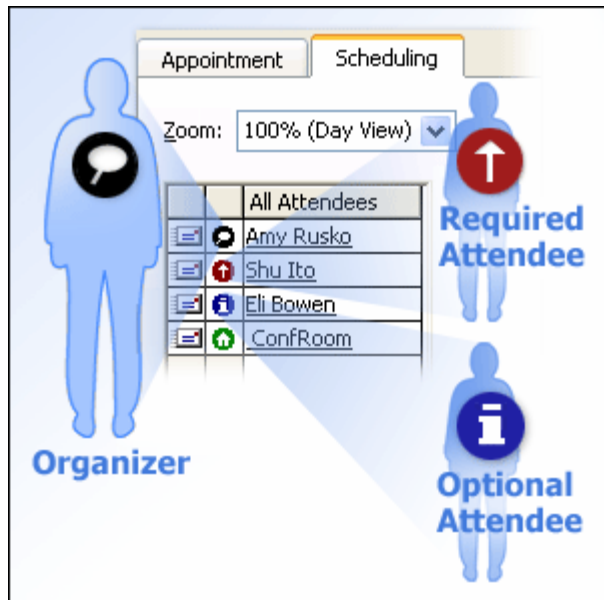
**The Basics
Elements of a
Meeting Request**

Outlook meetings are activities you schedule in your calendar that involve inviting other people or reserving resources. The three basic elements of a meeting request are 1) an organizer 2) an attendee and 3) a location [aka resource].

Whoever sets up and sends a meeting request is the **organizer**. The organizer is the only person who can change the meeting details once it has been set up. Also, keep in mind that you can never assign a new organizer to an existing meeting. Once you're the organizer, you're always the organizer.

Anyone who is invited to the meeting is considered an **attendee**. There are two categories of attendee: required and optional. Once an attendee is added to the attendee list, that person will always be considered an attendee for the meeting. Even if an attendee declines a meeting, he or she is still considered an attendee.

The place the meeting will occur is the **location**, sometimes referred to as **resource**.

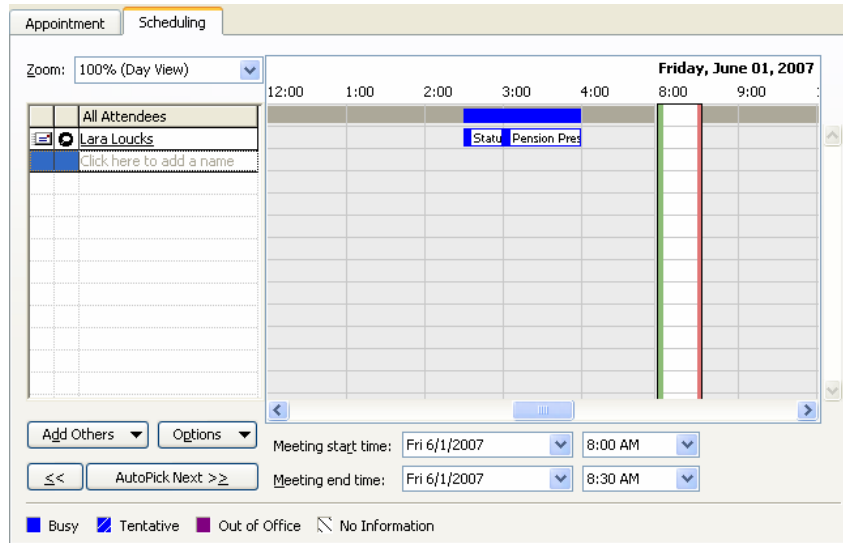


		All Attendees
Organizer		Lara Loucks
Required attendee		Tracy Mickle-Collins
Optional attendee		Elsie Rodriguez
Resource (Location)		Seminar Rm-Kendall
		Click here to add a name

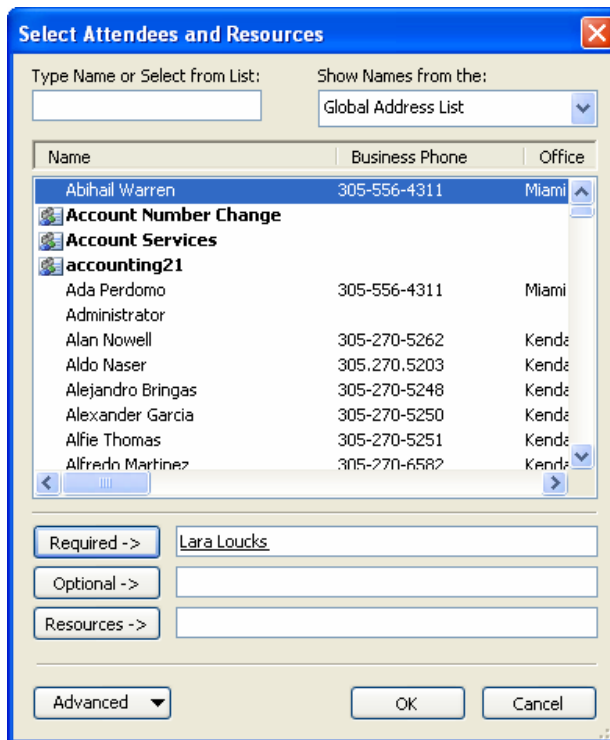


Add Attendees and Resources

1. Activate the **Scheduling** tab.



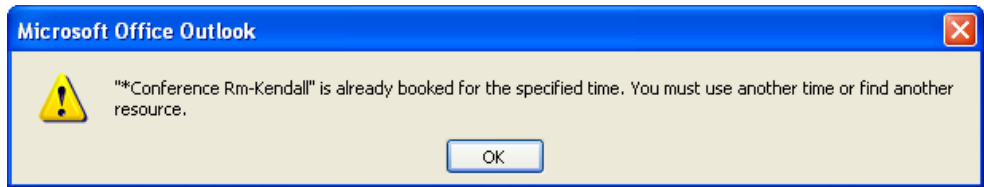
2. Click **Add Others>Add from Address Book**. The **Attendees and Resources** dialog box appears.



3. Locate and select the name of the required attendee.
4. Click **Required**. Repeat Step 3 until all required attendees are added.

Add Attendees and Resources

5. If applicable, locate and select the name of the optional attendee.
6. Click **Optional**. Repeat Step 5 until all optional attendees are added.
7. If applicable, locate and select the name of the resource.
8. Click **Resources**.
9. Click **OK**.



Check Availability of Attendees and resources

1. Choose a meeting start time.
2. Choose a meeting end time.
3. Note availability of attendees and resources.
4. Adjust meeting times, if necessary.



- 1 Colored horizontal bars show time constraints such as Free, Busy, or Out of Office.
- 2 The green and red vertical bars represent the start and end times of the meeting you're setting up.
- 3 To quickly find a time when everyone is available, click **AutoPick Next**.



Complete the details and send

1. Activate the **Appointment** tab. The **To, Location, Start** and **End Time** fields are complete.
2. Type a descriptive subject line.
3. Write an effective agenda in the message box.
4. Click **Send**.



Write an Effective Agenda

1. Determine your meeting type.

While there many types of meetings, the two most relevant are:

- Status Meetings, generally Leader-led, which are about reporting via one-way communication
- Work Meetings, which produce a product or intangible result such as a decision

2. Write each discussion topic on a separate line beginning with an action verb.

Some common meeting action verbs include:

Answer	Define	Facilitate
Brainstorm	Determine	Identify
Celebrate	Discuss	Review
Decide	Explain	Share

3. Type an allotted time amount after each topic and who is responsible for that topic.

Sample agendas:

Agenda (30 minutes)

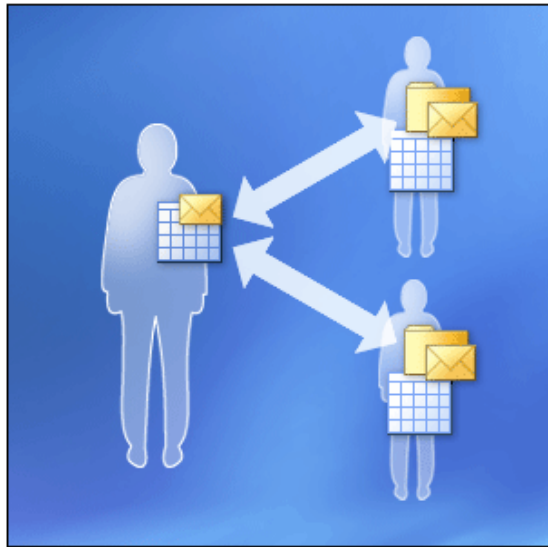
- Facilitate icebreaker, 10 min (Lulu)
- Share annual report results, 10 min (Jojo)
- Celebrate success and eat cake, 10 min

Agenda (1.5 hours)

- Facilitate icebreaker, 5 min (Ariel)
- Brainstorm new product ideas, 45 min (Bambi)
- Answer questions, 15 min
- Decide which idea to focus on, 15 min
- Assign project roles, 10 min (BMOC)



The Process



The meeting organizer sends a meeting request to attendees. The request goes both to the inboxes and the calendars of the attendees. Responses go back to the meeting organizer.

Outlook keeps track of the meetings using the Inbox and the Calendar. When meeting details change, they can be updated for everyone, all at once, with the click of a button.

The meeting organizer schedules the meeting and sends all of the participants a **meeting request**. This request is delivered to the Inboxes of all of the meeting participants.

Once the request is in the attendee's **Inbox**, Outlook recognizes it as something that belongs in the **Calendar** and puts it there as a *tentative* entry until the attendee has a chance to respond.

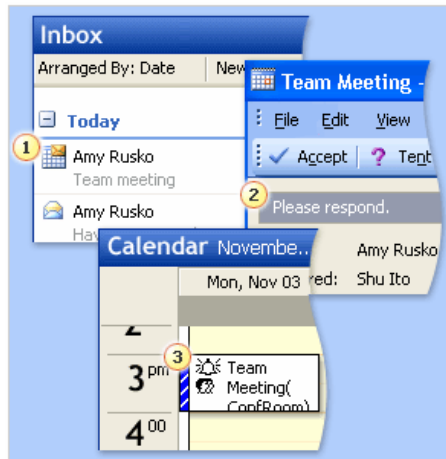
Attendees read the request and respond. A meeting response, which is similar to a meeting request, is sent back to the Inbox of the meeting organizer — and just as it did with the requests; Outlook recognizes each response as something special. The meeting entry is updated in the organizer's calendar with information about who is coming.

Outlook works behind the scenes to keep up the connections between meeting requests, responses, and entries in your calendar. The comings and goings of meeting requests and their related calendar entries are tracked in Outlook by something nick-named the "sniffer." You'll see the work of the sniffer by looking at the **InfoBar** of a meeting request in your **Inbox** or a meeting entry in your **Calendar**.

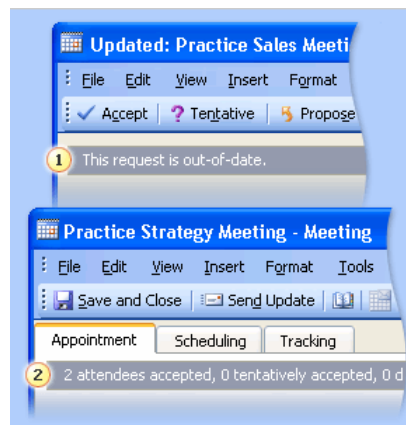
The Process (cont'd)

When you're a meeting organizer the meeting requests you send to your attendees, as well as their responses, are detected by the sniffer as they sit in your **Inbox**. The sniffer then updates the **Calendar** and the requests themselves with the relevant information. For example, look in the **InfoBar** to see the responses that the sniffer has counted in the **Inbox**.

When you receive a meeting request, the sniffer automatically enters that request as a tentative item in your calendar to help reduce your chances of getting double-booked. If the sniffer has detected a later version of a meeting request, the **InfoBar** of that request may read **This request is out-of-date**.



- 1 A meeting request sent to an attendee.
- 2 The InfoBar.
- 3 A tentative calendar entry for the meeting.



- 1 The InfoBar in a meeting request to an attendee that has been subsequently updated.
- 2 The InfoBar for a meeting in the Meeting Organizer's calendar, showing a quick count of how many attendees have accepted and how many have declined.



The Four Types of Meeting Responses

The four choices for responses are:

- 1) **Accept**
- 2) **Propose New time**
- 3) **Tentative** and
- 4) **Decline**

Accept a meeting that you know you'll be able to attend. When you accept a meeting, the meeting is scheduled in your Calendar and you receive updates if the meeting organizer changes the details of the meeting. If others view your free/busy time, the time appears as **Busy** by default.

Propose a New time if you would like to attend the meeting yet it isn't at an ideal time. Whenever you make a counter proposal, it is sent with a default message saying that you want to propose a new time, but that you have tentatively accepted the meeting.

Use the **Tentative** option if you're interested in the meeting, but aren't sure whether you'll be able to make it. The meeting is scheduled in your Calendar and that block of time is displayed to others as tentatively unavailable.

Decline a meeting if you can't go. Declining a meeting deletes the item from your Calendar (freeing that block of time), but it does not sever your ties with the meeting: You'll still get updates if the meeting organizer makes them and you'll have the opportunity to respond to the update. (If you truly want to opt out of a meeting, you may want to ask the organizer to remove your name from the attendee list.)



Caution: If you simply delete the request without responding, you will lose the meeting request from your Calendar.

Before you respond, read the text in the Infobar to make sure you're responding to the most up-to-date version of the request.



If you want to check your calendar before you respond to a request, you can click the Calendar button on the Standard toolbar of the request.



Accept a meeting

1. Open the meeting request.
2. Click **Accept**. A prompt appears.

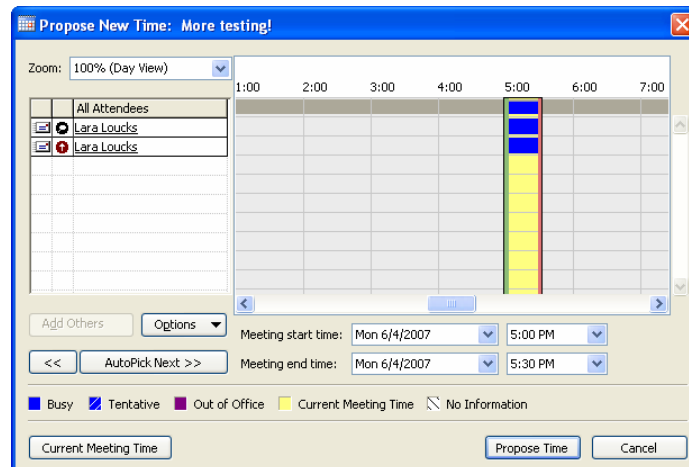


3. Do one of the following:
 - Click **OK** to send the response.
 - Select **Edit the response before sending** and click **OK** to include a message with your response. Type a message. Click **Send**.

The meeting time is marked on the Calendar as busy and a response is sent to the meeting organizer.

**Propose New Time**

1. Open the meeting request.
2. Click **Propose New Time**. The **Propose New Time** dialog box appears.
3. Choose the new time based on the availability of other attendees.
4. Click **Propose Time**. A message box appears.
5. Type an explanation as to why you are proposing a new time.
6. Click **Send**.



Tentatively Accept a Meeting

1. Open the meeting request.
2. Click **Tentative**. A prompt appears.



3. Do one of the following:
 - Click **OK** to send the response.
 - Select **Edit the response before sending** and click **OK** to include a message with your response. Type a message. Click **Send**.

The meeting time is marked on the Calendar as tentative and a response is sent to the meeting organizer.



Decline a meeting

1. Open the meeting request.
2. Click **Decline**.
3. A prompt appears.



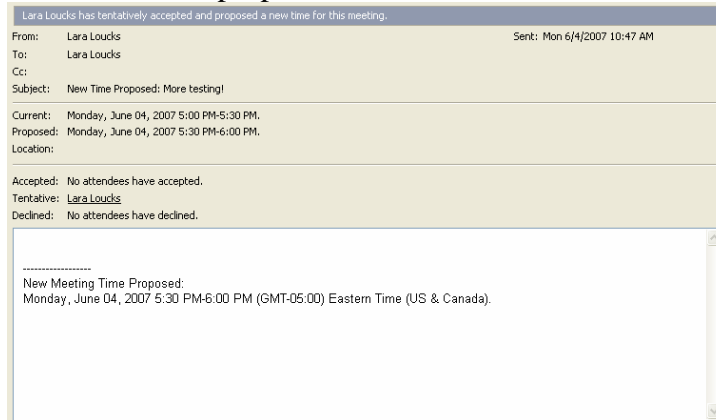
- 4.
5. Do one of the following:
6. Click **OK** to send the response.
7. Select **Edit the response before sending** and click **OK** to include a message with your response. Type a message. Click **Send**.

The meeting is deleted from your Calendar and a response is sent to the meeting organizer.



Accept a new proposed time

1. Open the meeting request.
2. Click **Reply**.
3. Type your message.
4. Click **Send**. The meeting remains at the time you specified.
5. Delete the counter proposal.



Decline a new proposed time

1. Open the meeting request.
2. Click **Reply**.
3. Type your message.
4. Click **Send**. The meeting remains at the time you specified.
5. Delete the counter proposal.

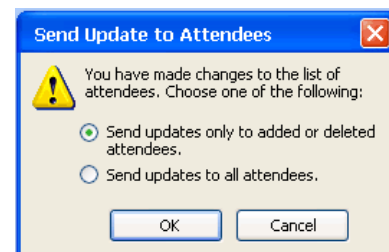
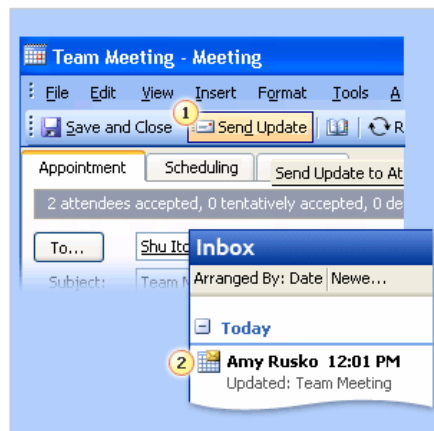


Send updated meeting requests

There are a number of reasons to update a meeting request:

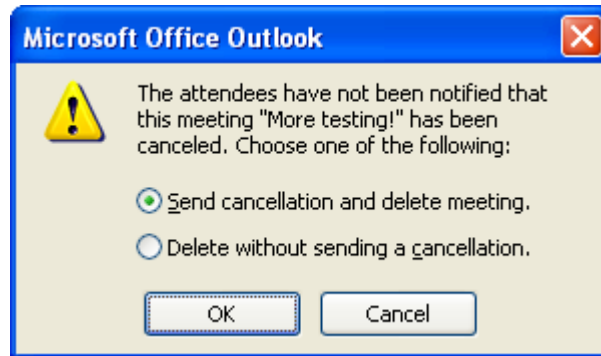
- additional attendee
- change in location, date, or time

If you are the meeting organizer and you want to invite another person after sending the original meeting request, add the person to the attendee list (the To line) of the original meeting and then send an update to all attendees.



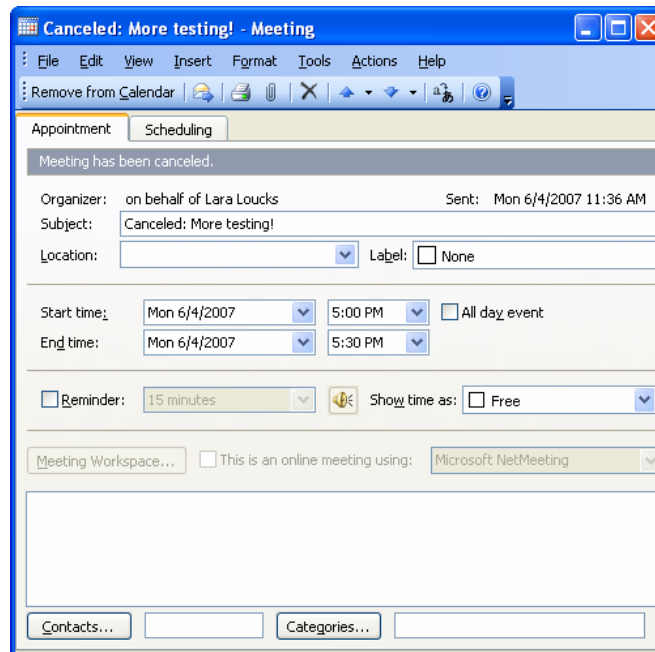
Cancel a meeting

1. Open the meeting entry.
2. Click **Actions>Cancel Meeting**. A prompt appears.
3. Select **Send cancellation and delete meeting**.
4. Click **OK**.
5. Type a message.
6. Click **Send**.



Remove cancelled meeting from your calendar

If you receive a meeting cancellation, click **Remove from Calendar** to remove the meeting from your calendar. Deleting the cancellation from your **Inbox** won't remove the meeting from your calendar.



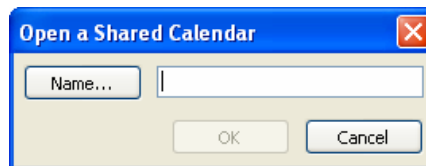
Track responses to meeting requests

1. Open the meeting request.
2. Click **Tracking**.



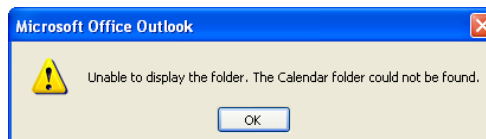
Open a Shared Calendar

1. Click **Calendar**.
2. Click Open a Shared Calendar. The **Open a Shared Calendar** dialog box appears.



3. Click **Name**. The **Select Name** dialog box appears.
4. Locate and click the user's name.
5. Click **OK**. The user's calendar appears.

Note: If you do not have permissions to open a user's calendar a prompt appears.



Once you've opened a calendar, it appears in the Other Calendars section of your navigation pane. Click the checkmark to the left of the calendar name to hide. Click again to show.

