

Outlook 2003 Calendar and Scheduling Skills Workshop

I. Other Training Opportunities

Online Outlook Training from Microsoft
(<http://office.microsoft.com/en-us/training/CR061832721033.aspx>)

FCCC Online Training
(https://www.foundationccc.org/FCCC/Training/training_apply.asp)

MS Office Webcasts
(<http://www.microsoft.com/events/business.mspix>)

For Outlook skills help, or departmental training, contact Terry Gray, (760) 744-1150 ext. 2877, tgray@palomar.edu. If you are having email problems with the implementation of Outlook or Exchange server at Palomar College, contact the help desk at (760) 744-1150 ext. 2140 or helpdesk@palomar.edu.

II. Calendar Skills

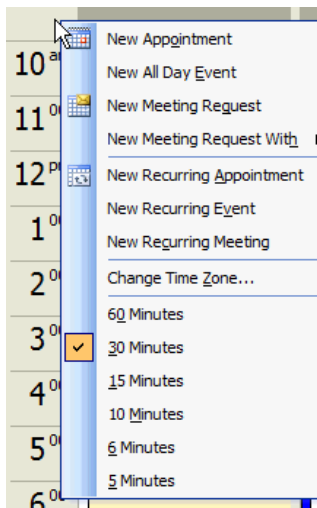
A. Formatting and setup skills

Setting up your calendar. Calendar options are set on the Tools > Options dialog box by clicking the Calendar Options... button. Calendar setup includes defining your typical work week and office hours, setting the reminder time, and setting the background color of the calendar.

A great introductory lesson to the calendar from Microsoft is:

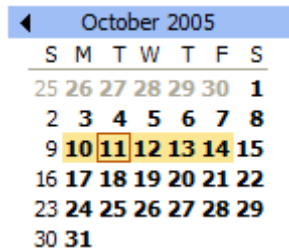
[Getting to know your Outlook calendar](http://office.microsoft.com/training/training.aspx?AssetID=RC011719291033)
(<http://office.microsoft.com/training/training.aspx?AssetID=RC011719291033>)

Changing the time scale on your calendar. The default time scale on the Outlook calendar is 30 minutes. To change this, right-click the time-scale bar and select a different time interval from the pop-up menu.

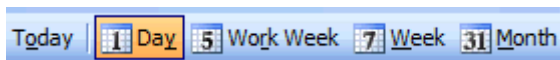


Navigating the calendar. The Outlook calendar is unique in that it understands English phrases like "in two weeks" or "next Wednesday" or "in three years" or "St. Patrick's day." Pressing Ctrl-G and typing in any of these English phrases will cause the calendar to jump to that date.

Another way to achieve a custom view in the calendar is to drag over a day or set of days in the printed calendar area. The days drag over will display on the calendar.



Displaying calendar views. The icons at the top of the calendar view within Outlook may be used to change your view of the calendar from 1-day, 5-days, 7-days and 31-days. The Today button will bring you back to the current date.

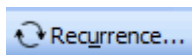


Try this audio lesson from Microsoft on [Great Outlook calendar features to make time work for you](http://office.microsoft.com/training/training.aspx?AssetID=RC011550431033) (<http://office.microsoft.com/training/training.aspx?AssetID=RC011550431033>).

Making an appointment. An appointment is time that you reserve on your Outlook calendar, not necessarily involving anyone else. There are several ways to initiate an appointment on the calendar: click the calendar button, then click the New icon; from any view choose File > New > Appointment; hold down Ctrl + Shift + A; or, simplest of all, double click the time slot on the calendar you wish to use for the appointment. All of these techniques will bring up the appointment form. On the form, fill in the dates and times

Moving an appointment to another time. It is simple to move an appointment from one time/day to another. Simply click on the appointment in your calendar view to select it, then drag it to another day on the calendar. You can also drag the borders of appointments to expand or contract them, and the time for the meeting adjusts if you do so.

Creating recurring appointments. It is simple to create recurring appointments in the Outlook calendar. To start the process, schedule an appointment (or meeting) and click the recurrence button at the top of the appointment form:



The recurrence dialog box will allow you to schedule any combination of recurrence for the meeting on a daily, weekly, monthly or annual basis.

Appointment Recurrence

Appointment time
 Start: 5:00 PM End: 5:30 PM Duration: 30 minutes

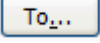
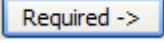
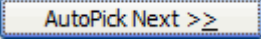
Recurrence pattern
 Daily
 Weekly
 Monthly
 Yearly

Day 11 of every 1 month(s)
 The second Tuesday of every 1 month(s)

Range of recurrence
 Start: Tue 10/11/2005
 No end date
 End after: 10 occurrences
 End by: Tue 7/11/2006

Note that the recurrence dialog also give you the means of controlling the range of occurrence.

Changing the time of a recurring appointment. To change the time of a recurring appointment, simply double click the recurring appointment on your calendar. You will be asked if you wish to edit this occurrence or the series of occurrences. If you are changing the time for one meeting only, choose "this" occurrence, otherwise choose the series. Make the changes you wish on the appointment form and click Save to save them.

Planning a meeting. To begin planning a meeting using Outlook click File > New > Meeting Request (Ctrl + Shift + Q). Click the To: button () and invite the required participants by looking up the participants in the Outlook address book and clicking the required button (). Of course, this only works with people who have accounts on the local Exchange server. Now click the Schedule tab in order to see the calendars of the invitees. To have Outlook find the next available time that fits the schedule of all attendees click the AutoPick Next button (). When Outlook has found an acceptable time when all required participants are available, send the invitation.

Invitees can respond by accepting the invitation, declining it, sending a tentative acceptance, or suggesting a new time, if you allow this (a setting in Calendar setup in Tools > Options).

After you have received responses from one or more of the invitees, you can track the status of the responses on the "Tracking" tab of the meeting form. To see it, double click the meeting time on your calendar and click the Tracking tab. You can manually set the response for those who respond by phone rather than by Outlook.

	Name	Attendance	Response
	Gray, Terry	Meeting Organizer	None
	Phillips, Shay	Required Attendee	Tentative
	Norcross, Chris	Required Attendee	Declined
	Armstrong, Elaine	Required Attendee	Tentative
	Valencia, Myrna	Required Attendee	Accepted
	Click here to add a name		

You can also see a quick Tally at the top of each of the responses as they are returned to your inbox:

Accepted: [Valencia, Myrna](#)
Tentative: [Phillips, Shay](#); [Armstrong, Elaine](#)
Declined: [Norcross, Chris](#)

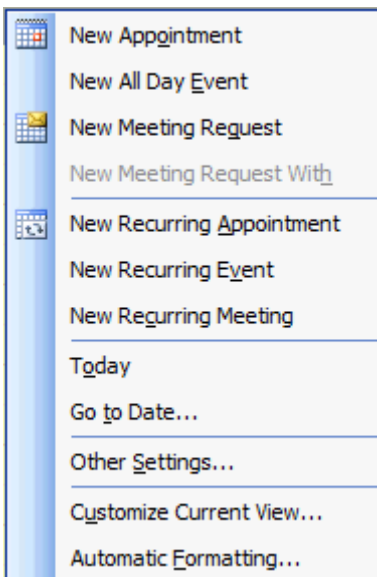
If someone has proposed another time for the meeting (if you allow this in your calendar setup) you will see the following buttons at the top of their returned meeting response:



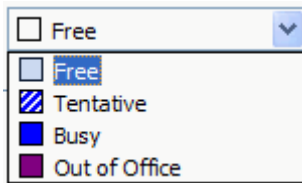
You can either accept their proposal (which is included in the body of the response) or View All Proposals, which will allow you to pick from them (if there is more than one) or propose an entirely new time.

Microsoft has a useful audio lesson titled [Organize meetings with Outlook](http://office.microsoft.com/training/training.aspx?AssetID=RC011659751033) (<http://office.microsoft.com/training/training.aspx?AssetID=RC011659751033>).


Scheduling an all-day event. To schedule an all day (or multi-day) event, go to calendar view (click the calendar button) then right-click the grey bar at the top of the daily view. Select "New All Day Event" from the pop-up menu.



If the event spans more than 1 day, include the date range on the appointment form. Also on the appointment form choose whether to show time as Free, Busy, Out of Office, or Tentative. Click Save and Close to save the all day event.



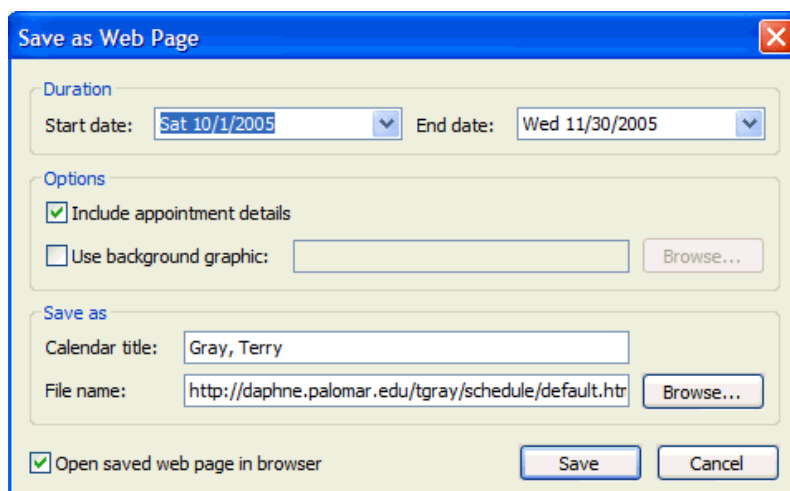
An all day event will be reflected in the grey header bar for each day it is schedules (holidays show this way in Outlook). You will still be free to use the appointment slots on your calendar during the all day event period.

Attaching files and items to appointments. You may attach files or Outlook items to calendar appointments just as you can with emails. To attach a file, click the paper clip icon at the top of the appointment form (). To attach an item, choose Insert > Item... from the menu bar, and locate the item you wish to attach. Attachments to appointments can be extremely useful in gathering all the materials you will need for a meeting in one convenient place.

Displaying the taskpad within the calendar view. Use the View menu to display the taskpad (an abbreviated version of the task folder) within a calendar view. Many people use this as their default Outlook view, with their day and tasks scheduled before them. The View > Taskpad View menu choice can be used to change the view of the taskpad within the calendar.

Many people use their calendar with the taskpad and turned on as their opening view in Outlook. I prefer the Outlook Today view with the mail navigation pane turned on, which contains calendar, tasks, and a summary of unread mail in key folders.

Publishing your calendar to the web. It is simple to publish your calendar to the web. Go to calendar view and choose File > Save as a web page...



Define the date range you wish to publish and the web address (you must have permissions to publish to this address, of course. Your own Palomar web site would be appropriate). Click Save and the publish operation will complete. View the web page at the specified address. Be careful not to publish to the root of your own web site so that the default.htm document is not overwritten.

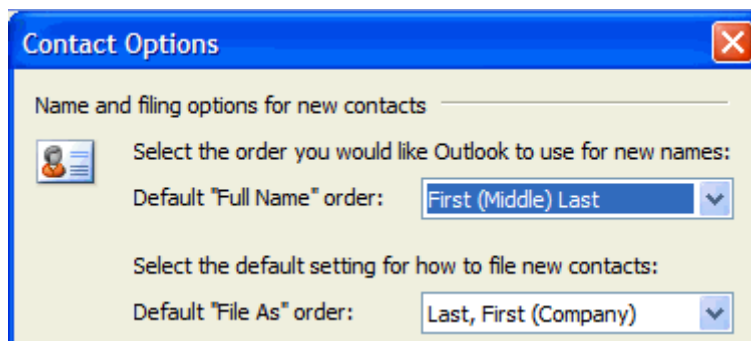
Also of relevance to managing your Outlook calendar are:

[Seeing and sharing multiple calendars in Outlook](http://office.microsoft.com/training/training.aspx?AssetID=RC010333631033)
(<http://office.microsoft.com/training/training.aspx?AssetID=RC010333631033>)

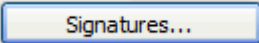
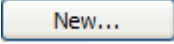
[Keep track of birthdays and anniversaries](http://office.microsoft.com/training/training.aspx?AssetID=RC060823511033)
(<http://office.microsoft.com/training/training.aspx?AssetID=RC060823511033>).

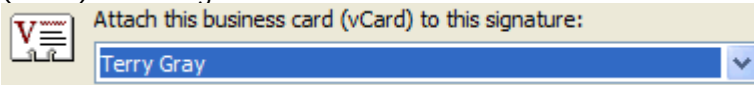
III. Contacts Skills

Setting up the way your contacts are filed. Use the Tools > Options > Contact Options dialog to set up your contact folder. There are only two significant settings, 1) how to display names, and 2) how to file names.



Creating a vCard. Though useful as a means of distributing your contact information, a vCard is not created in the contacts area of Outlook. It is created in the Signatures area. Here's how:

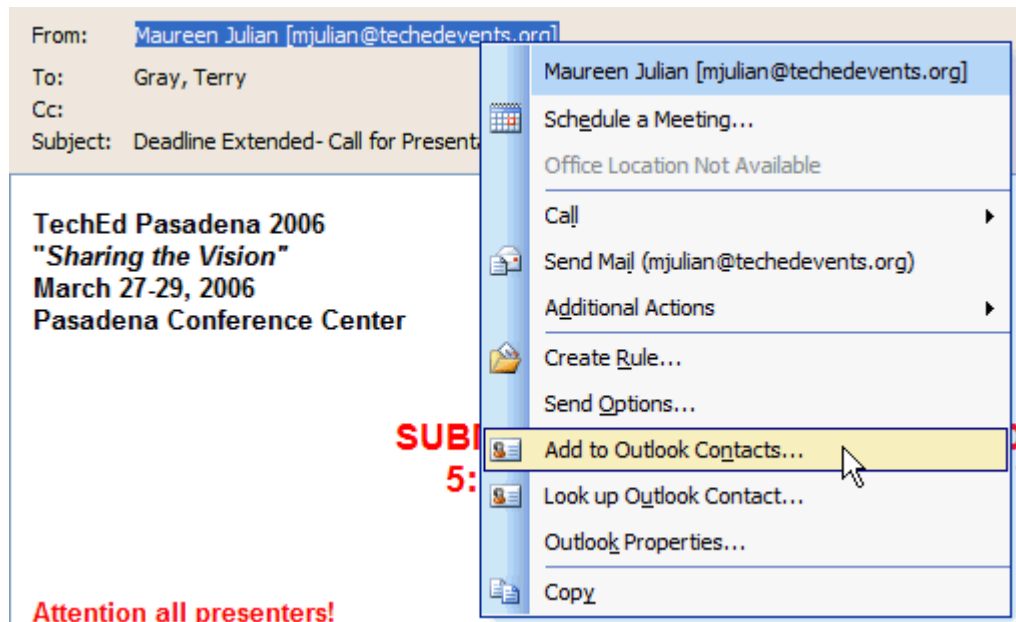
1. Tools > Options > click the Mail Format tab
2. Click the Signatures... button 
3. Click the New... button 
4. Give the signature a title, be sure "Start with a blank signature is selected, and click the Next... button.
5. Create a signature and select your contact information under "Attach this business card (vCard) to this signature:



- 6.
7. Click Finish.

Each time you use this signature file in an email your vCard will be attached.

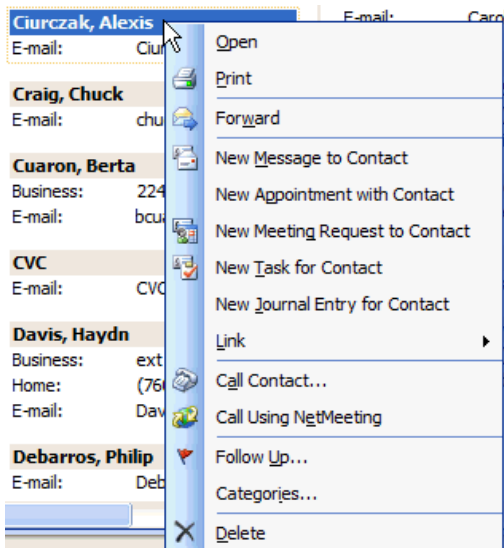
Creating a contact from the To: field. When you receive an email from someone you wish to add to your contacts list, simply right-click their email address in the header of the email and choose "Add to Outlook Contacts..." from the pop-up menu.



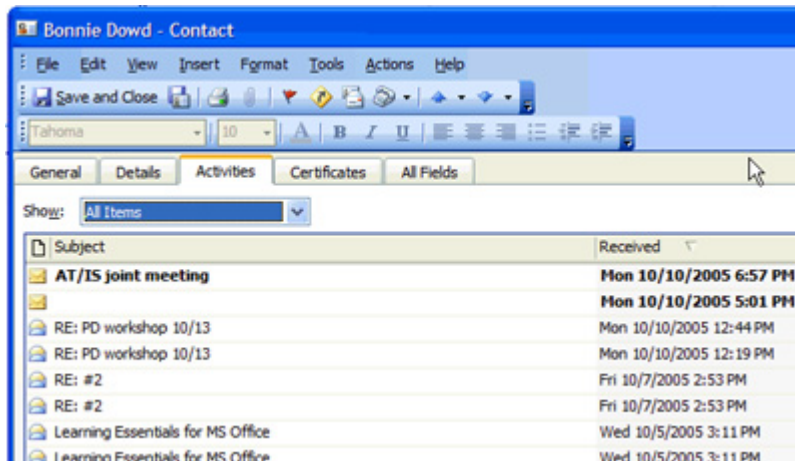
Creating a contact from one mailed to you. If someone attaches their contact information to an email (attached as an Outlook Item) simply drag and drop it on the Contacts button (or folder) to add them to your contacts.




Creating a new message to a contact. To quickly start a new message to someone in your contacts list, go to the contacts list and right-click the title of the contact card for the desired person and select "New Message to Contact" from the pop-up menu. Note that there are many other actions that can be initiated in the same manner.



Summarizing Activities with a contact. One of the great features of Outlook is the Activities tab in the contacts folder for any individual (or entity) in your contacts list. Open the contacts form for an individual and click the Activities tab. Outlook thinks for a moment (you will see a little magnifying glass icon circling on the upper right of the form if you look carefully) and then responds by listing all activities with that contact within Outlook from the time the contact was created. Wow.



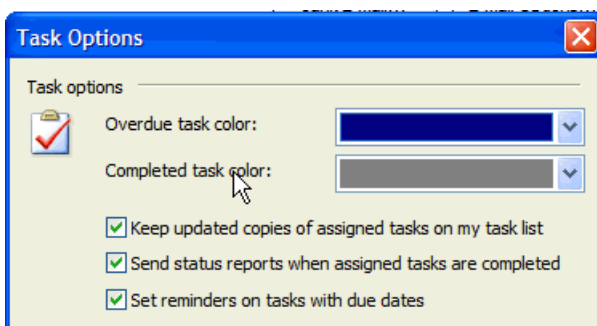
Creating a map to a contact's address.  The little yellow road sign at the top of the contact form will create an MSN map to the address given on the form when you click it.

Sending a contact to someone else. You can send your contact information to someone else as a vCard (see above) or simply attach it as an Outlook item to an email. The item will be meaningful to other users of the Exchange server, the vCard is more universal and can be used by many email programs.

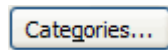
You may also be interested in this video lesson from Microsoft: [Great Outlook features to organize your contacts](http://office.microsoft.com/training/training.aspx?AssetID=RC011036431033) (<http://office.microsoft.com/training/training.aspx?AssetID=RC011036431033>). Also interesting is: [Business Contact Manager: track customer data in Outlook](http://office.microsoft.com/training/training.aspx?AssetID=RC010897461033) (<http://office.microsoft.com/training/training.aspx?AssetID=RC010897461033>).

IV. Task Skills

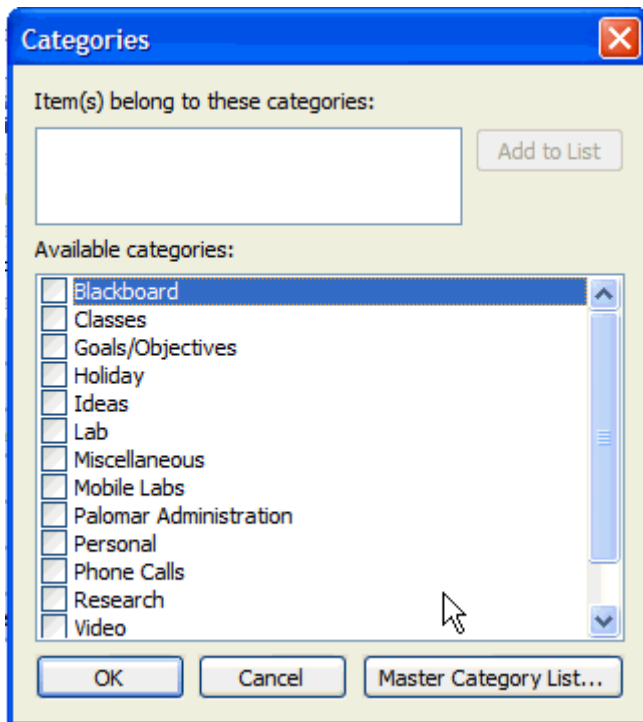
Setting up the task folder. There are just a few, self explanatory setup options for your task folder:



Categorizing tasks. Categories are a very powerful means of organizing not just your tasks, but any item in Outlook. To assign a category to a task (or appointment or contact) open the task form and click the categories... button at the bottom.



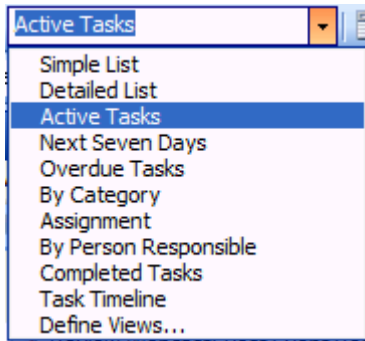
The Master Category list can be edited to suite your needs, and you can add categories whenever you want.



(Simply type the new category in the box at the top of the Categories form and click "Add to List.") To assign a category (or multiple categories) to a task, place a check in the box next to the category title.

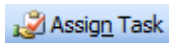
Arranging tasks by category. To arrange your tasks by category, first be sure categories are assigned to them (you can open each task's form and select a category, as described above, or you can select a group of tasks, click Edit > Categories... and select the categories to assign to the group of tasks all at one time).

Within your tasks folder, first, using the view drop-down, arrange tasks in a basic manner, like All active tasks. (This drop-down menu is on the advanced toolbar).



Then, use the View > Arrange By > Categories choice to arrange the list of active tasks into categories.

Assigning a task to someone else. To do this, open a new task form and click the Assign Task button.



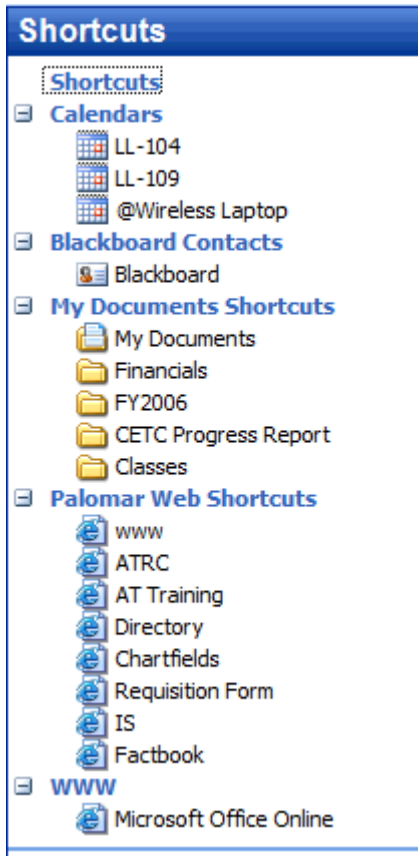
On the resulting form, fill in the To... field, the due date (if the task has a due date) and the other variables associated with this form. Once the task is assigned, you are no longer the owner of the task, but rather the person it is assigned to is the owner. She is the one responsible for updating its status and completing it. The details tab of the task form can be very useful in tracking the time spent on a certain task for reporting purposes. Also, organizing by categories makes it easy to summarize work on a certain project.

V. Shortcut Bar Skills

Setting up the shortcut bar. The shortcut bar is one of the most underutilized features of Outlook, but can make life easy in an environment like ours where some of the information we need is in Outlook, some on our hard drives or other computers on campus, and some on the web. You can create shortcuts to each of these areas on the shortcut bar and thereby have them at your fingertips.

To use the shortcut bar, click the shortcut bar icon on the button bar:

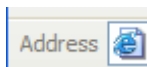




Creating an Outlook shortcut. To create an Outlook shortcut on the shortcut bar, right-click a shortcut group title and select the folder you wish to add a shortcut to. (A folder may contain email, a calendar, tasks, items, etc.).

Creating a disk folder shortcut. To add a disk location shortcut, start Windows Explorer, minimize it so that you can see the shortcut bar and the Explorer window. Navigate to the folder or file you wish to create the shortcut to and drag it to the shortcut group you wish to place it in (you will need to pre-create the group). When you release the mouse button, you will see a folder or file icon appear in the shortcut bar.

Creating a web shortcut. To create a web shortcut, start Internet Explorer. Minimize it so you can see the shortcut bar and the address bar in IE on the same page. Navigate to the web page you wish to create a shortcut to and drag the address icon from the IE address bar to the shortcut group where you wish to create the shortcut.



Moving Shortcuts and Shortcut Groups. You can rearrange your shortcuts or move them around between groups (or create new groups for the purpose) by simply dragging them within the shortcut bar. To move a shortcut group title, right-click it and choose move up or move down in the list of groups.

Deleting or Renaming Shortcuts. Delete or rename a shortcut by right-clicking its icon and choosing delete or rename from the pop-up menu.

