How to use the Calendar in Microsoft Outlook 2010

The Calendar module in Outlook 2010 allows you to schedule and track your appointments and meetings along with viewing calendars of others on campus. For more information on Office 2010, please visit the ITS Microsoft Online Training site at http://www.calstatela.edu/its/training/office.php#office

There are two quick ways to see the calendar:

1. Click ‘Calendar’ in the bottom left hand corner, this is the Navigation Pane area.
2. Click a date or event on the calendar above the To-Do bar, this is the Date Navigator.

Once you are in the Calendar, you can use the buttons at the top to navigate. Click Day, Week, or Month to switch views.

Return to the Date Navigator (now located on the left side). Click on dates to navigate from one date to another. The current date is boxed in red. Days with schedule items are bold with no scheduled item days in regular type. The left and right arrows allow you to scroll from one month to another.
Once you see your calendar, you can start scheduling. There are four types of entry:

1. **Appointment**: an activity that involves only you at a scheduled time.
2. **Meeting**: occurs at a scheduled time like an appointment but other people are invited using a meeting request sent via email.
3. **Event**: an activity that lasts all day long but does not block out time in your calendar. You can still have other entries appear in your schedule for the day.
4. **Task**: an activity that involves only you that does not need a scheduled time.

This guide will only cover appointments and meetings.

**Schedule an Appointment**

Appointments allow you to block out time that does not involve inviting other people. You can schedule one-time or recurring appointments.

To enter a new appointment, you can either click on ‘New Appointment’ in the upper left hand corner or double click on the date or time (if you are in day or week view you will see dates and times, if you are in month view you will only see days).

The Appointment window will open.

**Keyboard Shortcut**: CTRL+SHIFT+A
**Schedule an Appointment** (cont.)

**Subject:** description for the appointment  
**Location:** location (optional)  
**Start and End Time:** enter appropriate times  
**Show As:** click on the drop down to show others your availability during this time  
**Reminder:** by default, a reminder notice appears 15 minutes before the appointment start time. To change the time, click on the drop down and choose or click on ‘None’ to turn off the reminder.  

Click on ‘Save & Close’, you will see the appointment on your calendar.

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**ALL DAY EVENT checkbox:** when you are scheduling an appointment or meeting, there is a checkbox ‘All Day Event’ next to the date and time. This checkbox will allow you to choose the whole day or days without entering start and end times BUT will not block the time on your calendar preventing others from seeing that you are busy or out of the office. If you want others to see that you are not available, DO NOT check this box. See the section on ‘Checking Availability’ for more information.

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**Recurring Appointment**

When you are creating a new appointment or changing an existing appointment, you have the option to make it recurring.

On the Appointment tab, click on the button to open the Appointment Recurrence dialog box.

Set your time, recurrence pattern and range then click on ‘Ok’ to close the box.

Click on ‘Save & Close’ to finish creating or updating your appointment.

When you view your day or week calendar, you will see next to your appointment.
Updating or Deleting Appointments

Once an appointment is on your calendar, you can still make changes or delete the entry.

Update an Appointment: Open the appointment.

NOTE: if you are opening a recurring appointment, a dialog box will pop-up. Choose to update only that appointment (Open this occurrence) or update all occurrences (Open the series) then click ‘OK’.

Make your changes like subject, location or time, then click ‘Save & Close’.

Delete an Appointment: click on the ‘Delete’ button located next to ‘Save & Close’.

NOTE: if you are deleting a recurring appointment, when you click the ‘Delete’, you will have a choice to click only that appointment or the whole series.

Scheduling a Meeting

A meeting is an appointment which includes other people and uses Outlook to send notifications. Meetings can be a one-time or recurring sessions. Keyboard Shortcut: CTRL+SHIFT+Q

In the Calendar module, click on ‘New Meeting’ in the upper left hand corner, the Meeting window will open.

To: Type the name of each person you want to invite, entries are separated by a semicolon. You can also click on ‘To’ to open the ‘Select Attendees and Resources’ dialog box to search for participants. Once you find the person, you can indicate if they are ‘Required’ or ‘Optional’ then click on ‘OK’ to close the box.

NOTE: The ‘Resources’ button allows you to reserve specific conference or training rooms and is covered in the ‘Scheduling Resources’ section.

Subject: Enter the meeting description.

Location/Rooms: Enter the meeting location. If you need to reserve specific conference or training rooms, this will be covered in the ‘Scheduling Resources’ section.
Scheduling a Meeting (cont.)

In the notes section, type information you want to share, you can also attach files.

Click the ‘Send’ button to send the meeting request and it will add the meeting to your Outlook calendar.

Each person that receives your meeting request can accept, tentatively accept or decline your invite, propose a new meeting time and include a message in the reply. Responses to your meeting requests appear in your Inbox folder.

NOTE: When you click an answer, there is an option ‘Do not send response’ - **DO NOT USE THIS OPTION.** If you choose this, the meeting organizer will not receive any notice back or know what your response is.

Checking Availability

Once you have added all the attendees, you can use ‘Scheduling Assistant’ to check their availability to determine a date and start/end times.

Click on ‘Scheduling Assistant’ to open the calendars for the attendees.

Use the calendar on the right to view specific days/months.

Move the green (start time) and red (end time) bars to update the meeting times below.

With a date/time set, click on ‘Appointment’ to return to the ‘New Meeting’ page.

**ALL DAY EVENT checkbox:** when this check box is used, others on campus will not be able to see that you are busy or out of office.

Example - on the employee’s calendar:

January 20-24 the employee is out of the office
January 27-31 the employee is again out of the office but checked the ‘All Day Event’ checkbox.

In Scheduling Assistant:

January 20-24 shows the attendee is ‘Out of Office’.

January 27-31 shows the attendee is ‘free’.

If you will not be available for a day or more, do not use ‘All Day Event’ for your appointments.
Recurring Meetings
When you are creating a new meeting or changing an existing one, you have the option to make it recurring or remove the recurrence.

Click on ‘Recurrence’

NOTE: if you are opening an existing recurring meeting, a dialog box will pop-up. Choose to update only that meeting (Open this occurrence) or update all occurrences (Open the series) then click ‘OK’.

Update your recurrence settings and click ‘OK’.

If you are removing the recurrence, the ‘Remove Recurrence’ button will be available.

Updating or Cancelling Meetings
After your meeting is set, you may need to make changes. As the meeting organizer, you can make changes to the meeting request including adding or removing attendees, or cancelling the meeting. When a meeting is cancelled, it is removed from your Outlook calendar.

In the Calendar module, double-click on the meeting you need to update.

NOTE: if you are opening an existing recurring meeting, a dialog box will pop-up. Choose to update only that meeting (Open this occurrence) or update all occurrences (Open the series) then click ‘OK’.

Updating Meetings - enter your changes and click on ‘Send Update’. Your attendees will receive a notification which they can accept or reject and you will receive an email back.

REMINDER: Do not choose option ‘Do not send response’. If you choose this, the meeting organizer will not receive notice back.
Updating or Cancelling Meetings (cont.)

Cancel a Meeting: double-click on the meeting you want to cancel and click on ‘Cancel Meeting’.

NOTE: if you are canceling a recurring meeting, a dialog box will pop-up. Choose to cancel only that meeting (Open this occurrence) or cancel all occurrences (Open the series) then click ‘OK’.

Enter any information you want to share with the attendees. Click on the ‘Send Cancellation’ button. All attendees with receive a cancellation notice and your calendar will be updated.

Using Resources - this is currently being tested by the campus and the list of available locations is limited. Once the testing is completed, to add any additional rooms, please contact Administrative Technology. Each conference and training room has a coordinator who is responsible for accepting/declining/changing the room reservation.

This feature allows you to view availability and book designated conference or training rooms. There are two places to access the rooms:
New Meeting - on the right side is a ‘Rooms’ button. This allows you to add the room to your meeting request but does not allow you to view the room’s availability.
Scheduling Assistant - at the bottom left side is a ‘Add Rooms’ button. Allows you to add the room and view the room’s availability.

Choose one or more of the rooms,

On the schedule page, you can view the room availability. You can also add multiple rooms to view all at the same time to find an available one.

Once you have chosen a room and time, click on ‘Appointment’ to return to the main page and complete any final information. Click on ‘Send’ for meeting requests or ‘Save & Close’ for appointments to finish.
Using Resources (cont.)

On your calendar you will see the time blocked for your meeting.

You will also receive ‘tentative’ response for the room reservation.

Once the room coordinator accepts the reservation, you will receive an ‘accepted’ response and the time will be blocked on your calendar.