

Microsoft Outlook 2010 – Level 1

8 – Working with the calendar



WORKING WITH THE CALENDAR

InFocus

Outlook *Calendar* is a scheduling tool that helps you manage appointments, events and meetings with other people.

But before you can create appointments and schedule meetings, you will need to know what features are available in the *Calendar* and learn how to use them.

In this booklet you will:

- ✓ learn how to access the *Outlook Calendar*
- ✓ learn how to change the number of days that display in the calendar
- ✓ learn how to display specific dates in the calendar
- ✓ learn how to navigate within a calendar
- ✓ learn how to alter the current view of the calendar
- ✓ learn how to create a second time zone for a calendar
- ✓ learn how to delete a second time zone
- ✓ learn how to create a calendar
- ✓ learn how to delete a calendar
- ✓ gain an understanding of how you can share calendars
- ✓ learn how to work with multiple calendars

ACCESSING THE CALENDAR

The **Calendar** feature of Outlook has its own screen and you access it in much the same way as you access other Outlook features such as Mail, Contacts and Tasks.

You can access the Calendar using the **Navigation** pane or with a keyboard shortcut.

Try This Yourself:

Open
File

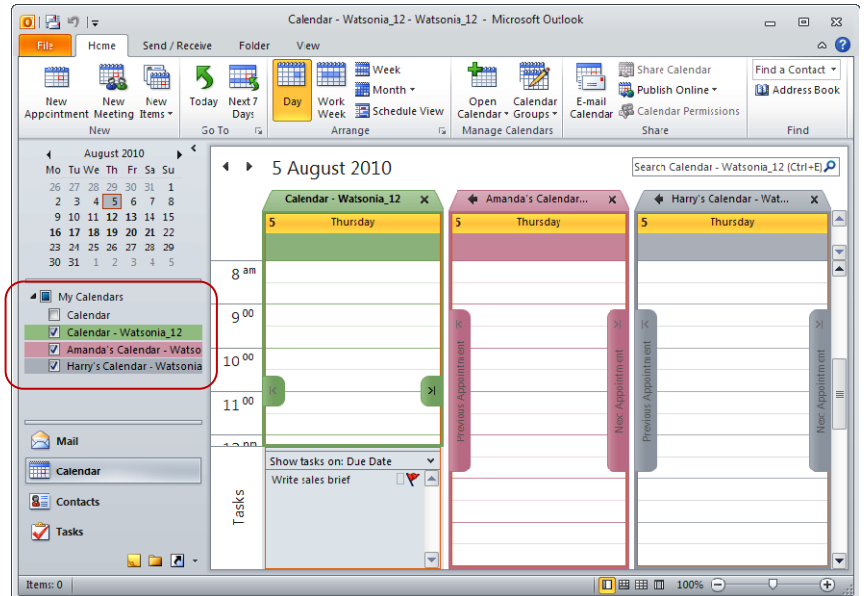
Before starting this exercise you **MUST** open the file *Watsonia_12.pst...*

1 Click on **[Calendar]** in the **Navigation** pane to display a calendar in Outlook

2 Click on each of the three calendars for **Watsonia_12** listed under **My Calendars** in the **Navigation** pane until all three calendars are ticked and displayed

If you have additional Calendars ticked, click on them to remove their tick...

3 Click on the ticks next to each calendar, except **Calendar - Watsonia_12**, until their ticks are removed and only one calendar remains on view



2

For Your Reference...

To **access** the **calendar**:

1. Click on **[Calendar]** in the **Navigation** pane
or
Press **Ctrl** + **2**

Handy to Know...

- Calendars are created in folders or files. You can create as many calendars as you require for your own specific purposes – but remember that the more you have, the more confusing it gets!

CHANGING THE CALENDAR ARRANGEMENT






Outlook lets you specify how many days you wish to have visible on your calendar. You can choose from a single day, the working week, a full week, the next seven

days from today, or an entire month. These arrangement tools are so important to the Calendar feature that Outlook includes them on both the **Home** and **View** tabs.

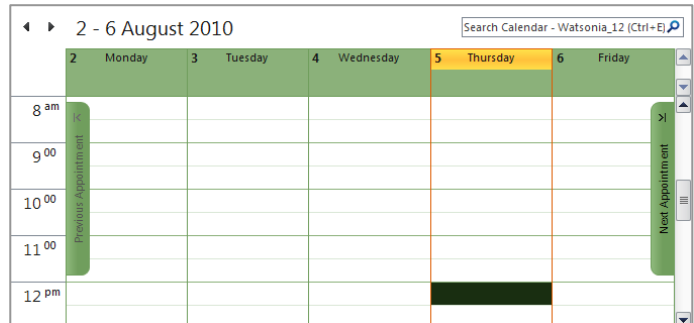
Try This Yourself:

Same
File

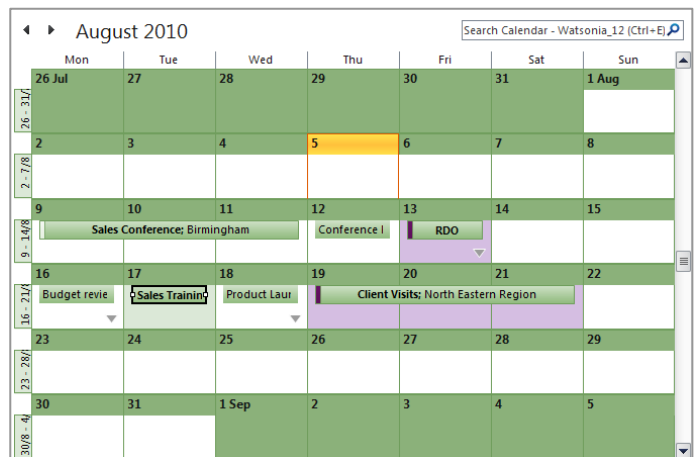
Continue using the previous file with this exercise, or open the file *Watsonia_12.pst...*

- 1 Click on the **Home** tab to see the available options
- 2 Click on **Work Week**  in the **Arrange** group to display Monday to Friday in the calendar
- 3 Click on **Week**  to display a full week in the calendar
- 4 Click on the drop arrow for **Month**  and select **Show High Detail** to display an entire month in the calendar
High Detail shows events, and appointments with their start and end times. Medium Detail shows events and appointments as solid bars at the times when they're scheduled, and Low Detail shows only events...
- 5 Click on **Next 7 Days**  in the **Go To** group to display the next seven days from today
- 6 Click on **Day**  to display the current day in the calendar

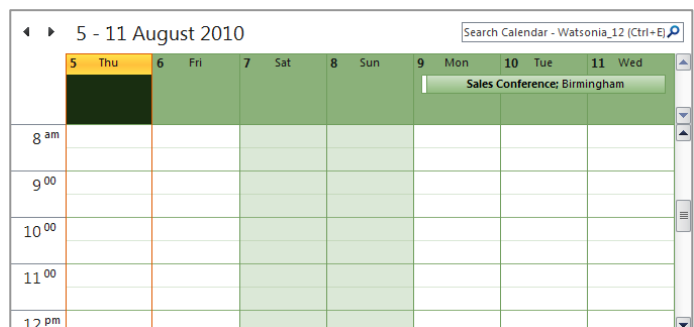
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



5



For Your Reference...

To change the number of days displayed in the calendar:

1. Click on the **Home** or **View** tabs
2. Click on **Day**  to display a single day, **Work Week**  to display the work week or **Month**  to display the month

Handy to Know...

- You can change the days comprising a work week and set the start and end times for a work day in the **Outlook Options** dialog box. To do this, click on the **File** tab to open the **Backstage**, click on **[Options]**, click on the **Calendar** category, and then set the desired options under **Work time**.

DISPLAYING SPECIFIC DATES

You will quite often need to display the activities that you have scheduled on a given date in the Calendar. You can achieve this using the tools on the **Ribbon**

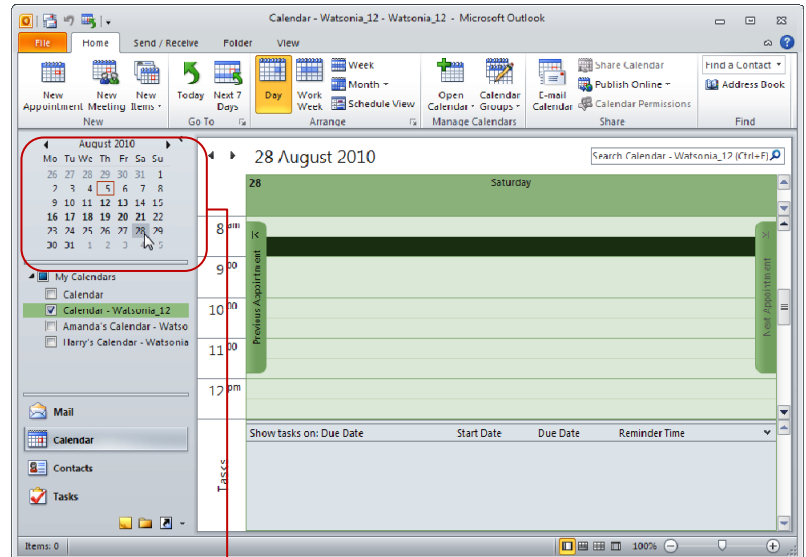
or a shortcut key. Being able to display specific dates in the Calendar can be very useful for planning your activities in advance.

Try This Yourself:

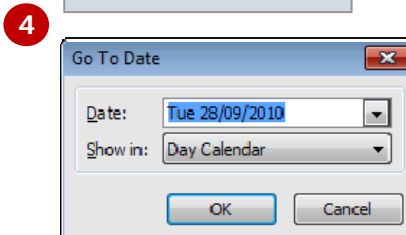
Same File

Continue using the previous file with this exercise, or open the file *Watsonia_12.pst...*

- 1 Ensure that only one day appears in the calendar, then click on the various dates in the month in the **Date Navigator** – notice how the calendar screen displays those days
- 2 Click on **next month** to the right of the month name in the **Date Navigator** several times to advance through the months
- 3 Click on **previous month** in the **Date Navigator** several times to go back through the months
- 4 Press **Ctrl** + **G** to open the **Go To Date** dialog box
- 5 Type a date for next year in **Date** (in the format **dd/mm/yy**) and then click on **[OK]** to display this day in the calendar
- 6 Click on **Today** in the **Go To** group to display the calendar for today

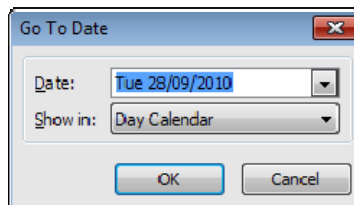


1 Date Navigator



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For Your Reference...

To **display** a **specific date** in the **calendar**:

1. Press **Ctrl** + **G**
2. Type the desired **Date**
3. Click on **[OK]**

Handy to Know...

- After displaying a specific day in the calendar, you can print it by clicking on the **File** tab to open the **Backstage**, clicking on **[Print]** and then selecting the desired **Print style**, such as **Daily Style**, **Weekly Calendar Style** and so on.

NAVIGATING WITHIN A CALENDAR








Outlook provides various ways to navigate within a calendar. In addition to the **Date Navigator** in the **Navigation** pane, you can also use the navigation arrows that appear at the top of the calendar page to

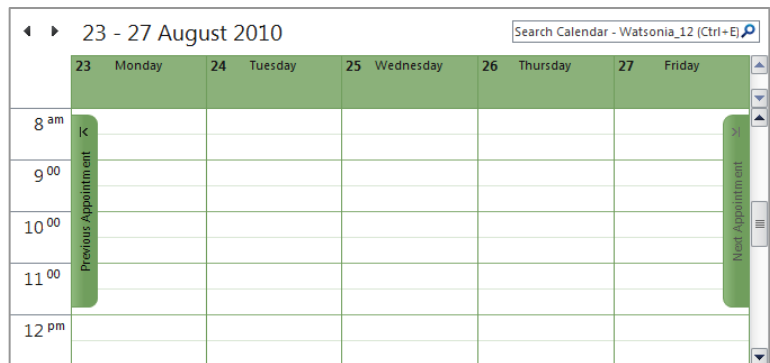
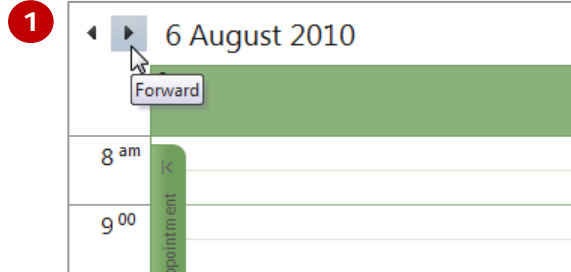
move to the next or previous day, week or month – depending on the view that is currently displayed. You can also use the **To-Do Bar** to move to a particular month as well.

Try This Yourself:

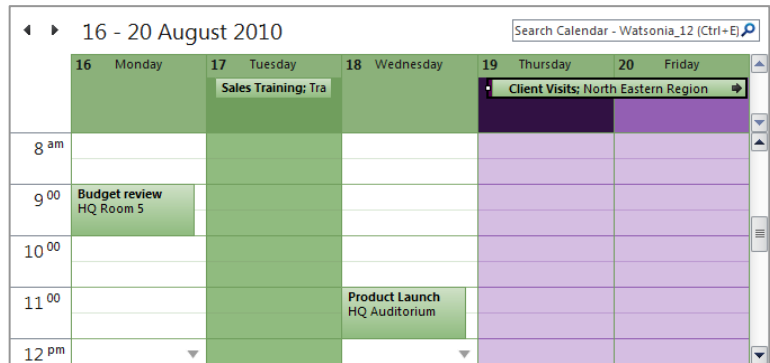
Same File

Continue using the previous file with this exercise, or open the file *Watsonia_12.pst...*

- 1 Ensure that **Day**  is selected and that today's date appears in the calendar, then click on **Forward**  (which is located to the left of the date in the calendar) to display the calendar for tomorrow
- 2 Click on **Back**  to display the calendar for today
- 3 Click on **Work Week**  to display the working week, then click on **Forward**  three times to display the calendar for three weeks' time
- 4 Click on the green **Previous Appointment** tab – this is located vertically along the left-hand edge of the calendar – to move to the previous appointment
In our case it is the Client Visits event...
- 5 Click on **Day**  and then on **Today**  on the **Home** tab





3



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For Your Reference...

To **navigate** within a **calendar**:

1. Arrange the calendar as desired: **Day**, **Week** or **Month** etc
2. Click on **Forward**  and **Back** 

Handy to Know...

- You can show more than one calendar on the screen at a time and you can navigate within each one. If you display more than one calendar side-by-side, each calendar appears in a different colour.

CHANGING THE CURRENT VIEW


With a paper-based diary, you are restricted to how you look at your calendar entries. Outlook, however, provides a range of different **views** that allow you to look through your schedule in a number of

ways. For example, **List** view shows activities sorted by start date and grouped based on whether or not they're recurring. You can modify these views and create new custom views.

Try This Yourself:

Same
File


Continue using the previous file with this exercise, or open the file *Watsonia_12.pst...*

- 1 Click on the **View** tab, then click on **Change View**  to open a gallery of options

Currently, **Calendar** view is selected...


- 2 Click on **List** to see a list of events sorted by start date

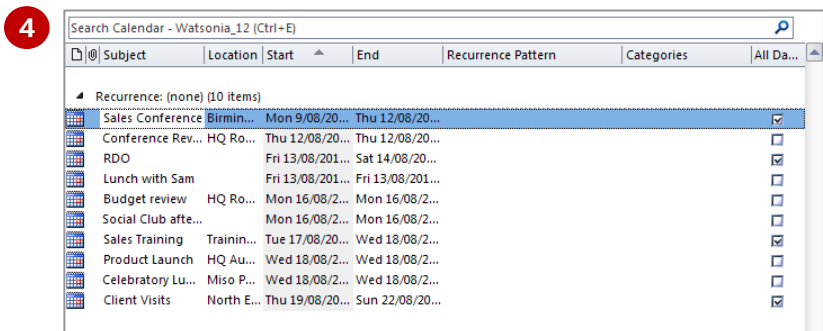
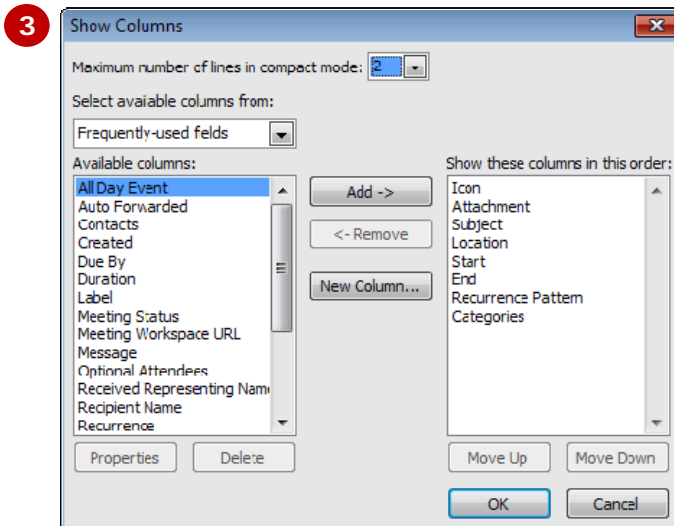
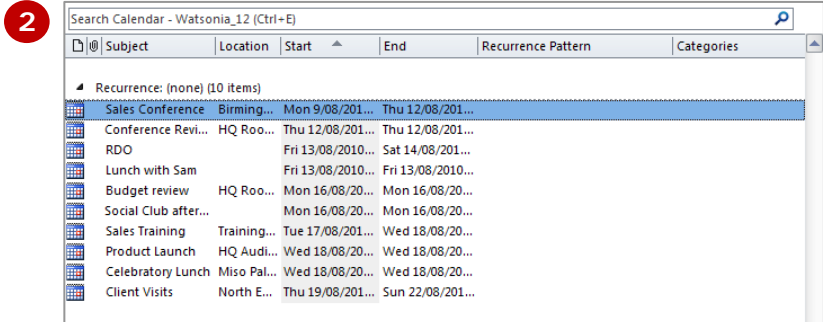
You can modify this...

- 3 Click on **Add Columns**  in the **Arrangement** group to open the **Show Columns** dialog box

- 4 Ensure that **All Day Event** is selected, then click on **[Add]** and then on **[OK]** to add the **Event** column


- 5 Click on the grey **All Day Event** column header to sort the data into all day events and non-events

- 6 Click on **Change View** , then click on **Calendar** to display the calendar in the default **Calendar** view





For Your Reference...

To **change** the **current view** of the calendar:

1. Click on **Change View**  in the **Current View** group on the **View** tab
2. Select the desired option

Handy to Know...

- After modifying a view, it will remain changed each time you use it until you click on **Reset View**  in the **Current View** group.
- To create a custom view, click on **Change View** , select **Manage Views** to open the **Manage All Views** dialog box, and then click on **[New]**.

CREATING A SECOND TIME ZONE


If you regularly deal with people in a city that operates in a different time zone – for example your company may have an office in Moscow – you can add and display a

second time zone in the Calendar. Doing this will be useful if you want to schedule meetings or conference calls at times that are appropriate in both locations.

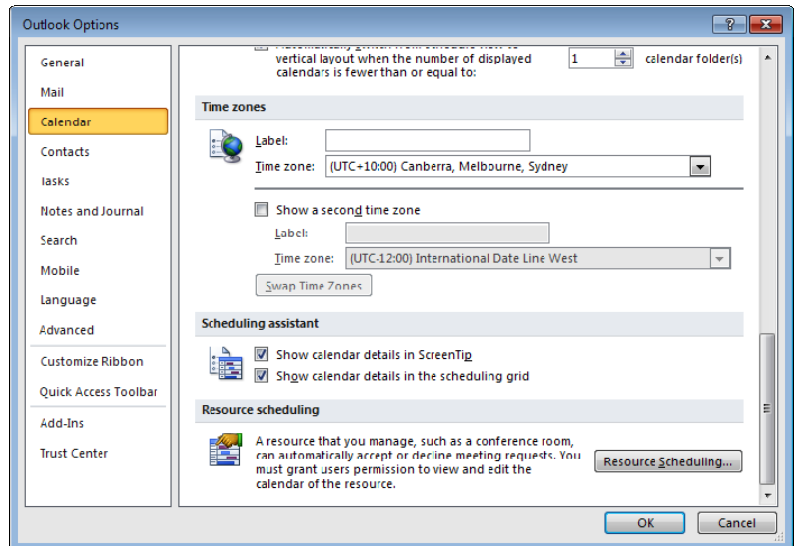
Try This Yourself:

Same
File

Continue using the previous file with this exercise, or open the file *Watsonia_12.pst...*

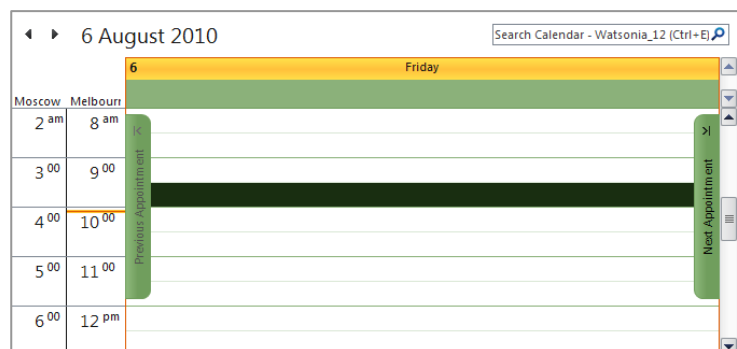
- 1 Click on the **File** tab, click on **[Options]** to open the **Outlook Options** dialog box, then click on the **Calendar** category to see the calendar options
- 2 Scroll down to the **Time zones** area
- 3 Tick **Show a second time zone**
- 4 Click on the drop arrow  for the second **Time zone** and select **(UTC+03:00) Moscow, St. Petersburg, Volgograd**
- 5 Click in the second **Label** and type **Moscow**, then click in the top **Label** and type the city that you are currently in
- 6 Click on **[OK]** to return to the calendar

The two time zones will appear to the left of the current calendar view



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For Your Reference...

To **create** a **second time zone**:

1. Click on the **File** tab, click on **[Options]**, then click on the **Calendar**
2. Tick **Show a second time zone**
3. Select the new **Time zone** and type the **Labels**

Handy to Know...

- When you add a second time zone, the current time in the primary time zone is highlighted in orange making it easier to see.
- The second time zone is used only to show a second time bar in Calendar view. It doesn't affect the way in which Calendar items are stored or displayed.

REMOVING A TIME ZONE

If you no longer work or communicate regularly with people in another time zone, you can remove their time zone from your Calendar if you had previously added it.

This very simple process will ensure that your Calendar remains as clear and as uncluttered as possible.

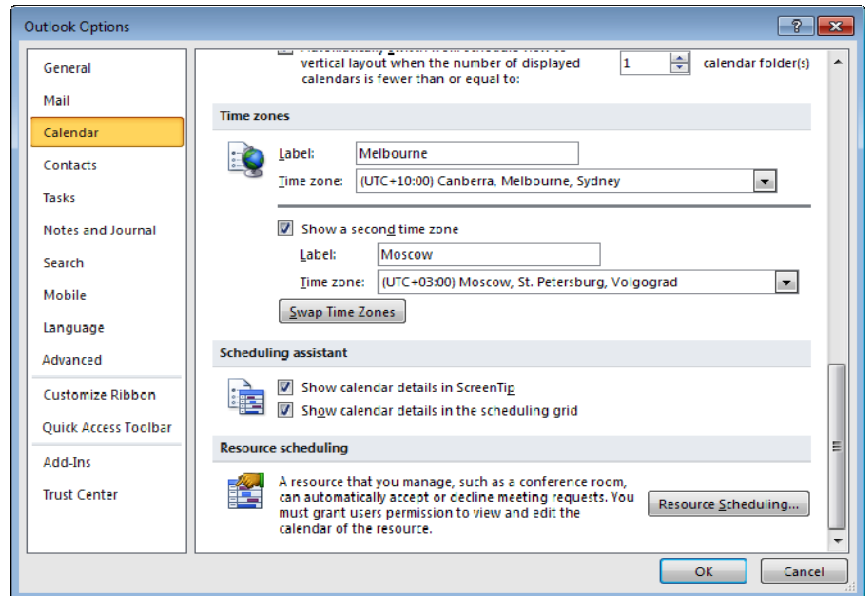
Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *Watsonia_12.pst...*

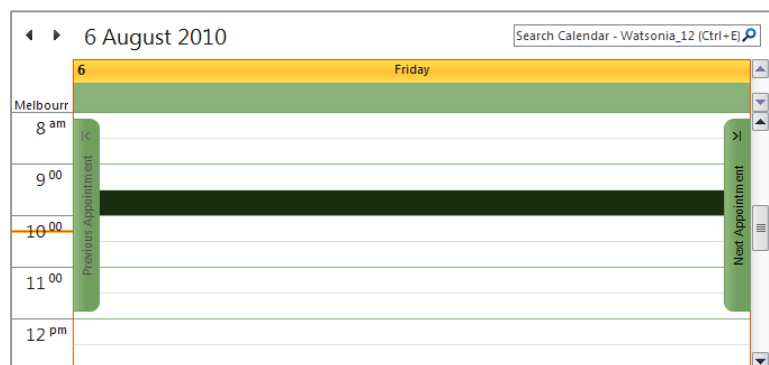
- 1 Click on the **File** tab, click on **[Options]** to open the **Outlook Options** dialog box, then click on the **Calendar** category
- 2 Scroll down to the **Time zones** area
- 3 Remove the tick from **Show a second time zone**
- 4 Click on **[OK]** to return to the calendar

Only one time zone will appear in the current calendar view



2

4



For Your Reference...

To **remove** a **time zone**:

1. Click on the **File** tab, click on **[Options]**, then click on the **Calendar**
2. Remove the tick from **Show a second time zone**
3. Click on **[OK]**

Handy to Know...

- When you have two time zones displayed, you can quickly switch from your current time zone to the other time zone. To do this, right-click in the empty space at the top of the time bar, then select **Change Time Zone** to open the **Outlook Options** dialog box. Click on **[Swap Time Zones]** and then click on **[OK]**.

CREATING A NEW CALENDAR


Outlook provides several default calendars. The first is a personal calendar that is for your use, and there is usually a calendar in your Mailbox which you can share if you use Exchange. And if this is still not

enough, you can create additional calendars. For example, if you play sport you may want to create a special sports fixture calendar that shows when matches will be played.

Try This Yourself:

Same
File

Continue using the previous file with this exercise, or open the file *Watsonia_12.pst...*

1 Click on the **Folder** tab, then click on **New Calendar**  in the **New** group to open the **Create New Folder** dialog box

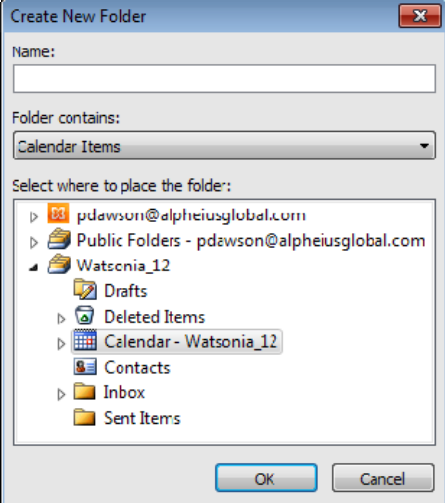
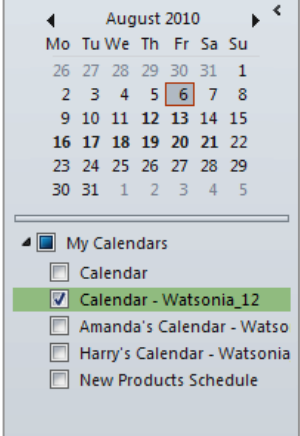
2 Type **New Products Schedule** in **Name**

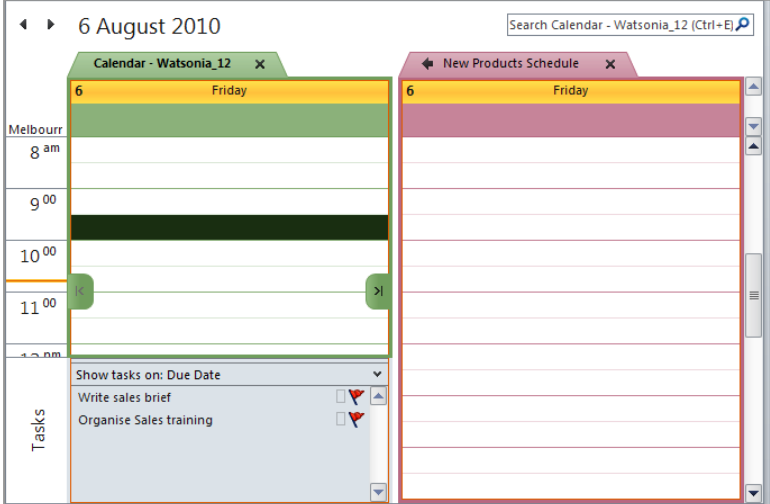
3 Ensure that **Calendar Items** is selected in **Folder contains**

4 Click on **Calendar - Watsonia_12** in **Select where to place the folder**, then click on **[OK]**

The new calendar will appear at the bottom of **My Calendars** in the **Navigation pane...**


5 Click on **New Products Schedule** to display it alongside the default calendar

1  **4** 


5 

For Your Reference...

To **create** a **new calendar**:

1. Click on **New Calendar**  on the **Folder** tab
2. Type the **Name**
3. Click on the desired folder in **Select where to place the folder**, then click on **[OK]**

Handy to Know...

- If you're an Exchange user and you have a set of calendars that you frequently view together (such as the members in your team), create a **calendar group** as it makes it quicker to see their schedules. Click on **Calendar Groups**  on the **Home** tab and select **Create New Calendar Group**.

DELETING A CALENDAR


If you no longer wish to use a calendar you can quickly delete it from Outlook. Deleting a calendar is much the same as deleting a mail folder. All of its contents, plus the

calendar itself, will be moved to the **Deleted Items** folder from which you can recover it fully if necessary or delete it permanently.

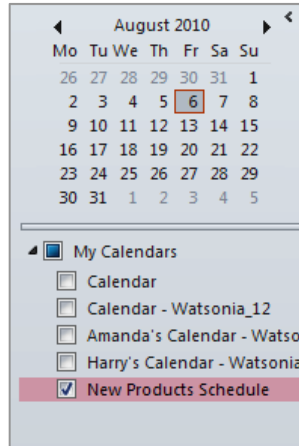
Try This Yourself:

Same
File

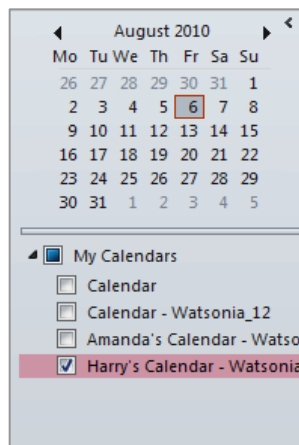
Continue using the previous file with this exercise, or open the file *Watsonia_12.pst...*

- 1 Remove the tick from the **Calendar – Watsonia_12** calendar to ensure only the **New Products Schedule** calendar is selected in the **Navigation** pane
- 2 Open the **Folder** tab, then click on **Delete Calendar**  in the **Actions** group
You will be asked to confirm the deletion...
- 3 Click on **[Yes]** to delete the calendar
The calendar will be removed from under My Calendars and Harry's Calendar will be displayed...
- 4 Redisplay only **Calendar – Watsonia_12**

1




3




For Your Reference...

To **delete** a **calendar**:

1. Click on the desired calendar in the **Navigation** pane
2. Click on **Delete Calendar**  in the **Actions** group on the **Folder** tab
3. Click on **[Yes]**

Handy to Know...

- If you have accidentally deleted the wrong calendar, you can recover it from the **Deleted Items** folder in the **Folders List** as long as you haven't emptied it. To display the **Folders List**, click on **Folder List**  at the bottom of the **Navigation** pane.


SHARING CALENDARS

If you are happy for other people to see an overview of when you are busy or free, you can share your calendar with other users. Outlook lets you share your calendar in three ways. You can share a

snapshot of your calendar by email, publish your calendar online, or if you are an Exchange user you can share your calendar using your Exchange Server account.


Sharing By Email

When you share your calendar by email, it will arrive in the recipient's Inbox as a message attachment (which they can open in Outlook if desired) along with a **Calendar Snapshot** in the message body.

To share a Calendar by email, click on **Email Calendar**  in the **Share** group (**Home** tab) to open the **Send a Calendar via E-mail** dialog box. Here you can select the calendar to be shared; the date range; and whether you want to include the **full details** from your calendar, **limited details** (availability and Subject only) or **availability only** (displayed as free, busy, tentative or out of the office).

Sharing Using A Microsoft Exchange Server Account

Microsoft Exchange Server enables calendar sharing with other users who have Exchange accounts. Your calendars can be viewed only by users to whom you have given permissions. Conversely, if you want to open someone else's calendar and they have not granted you permission to view it, Outlook will prompt you to ask the person for the permission you need.


To share your calendar with another Exchange user, click on **Share Calendar**  in the **Share** group (**Home** tab) to open a **Sharing invitation** (see sample below on the left). In addition to sharing your calendar with the recipient, you can also request permission to view their calendar in the **Sharing Invitation**.

Opening An Exchange Calendar


1. Click on the **Open this Calendar** link at the top of the **Sharing Invitation** message. The calendar will appear under **Shared Calendars** in the **Navigation** pane

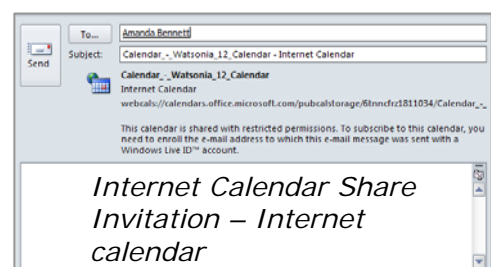
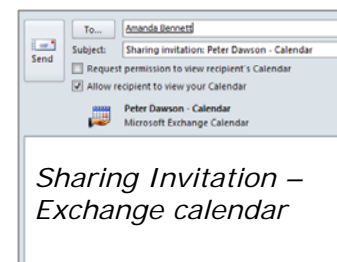
Sharing By Publishing A Calendar Online

You can publish your default calendar onto Microsoft's Office.com. This is a free service. Using this feature you can control who can access your calendar, and only you can modify your calendar in Outlook. In this situation, neither the publisher nor the person viewing your internet calendar requires an Exchange account.

To publish your calendar, click on **Publish Online**  in the **Share** group (**Home** tab) and select **Publish to Office.com** to open an Internet Calendar share invitation (see sample below on the right). Note that you must register for Office.com using a free Windows Live ID, which you can create during the registration process. This only takes a few moments.

Opening An Internet Calendar

1. Click on the **Subscribe to this Calendar** link at the top of the **Internet Calendar – Share** message. A message box will display showing the URL of the calendar
2. Select the URL and press **Ctrl** + **C** to copy it to the clipboard
3. In Calendar, click on **Open Calendar**  in the **Manage Calendars** group (**Home** tab) and select **From Internet**
4. Press **Ctrl** + **V** to copy the URL as the location of the internet calendar and click on **[OK]** to add the calendar in the **Navigation** pane under **Other Calendars**









WORKING WITH MULTIPLE CALENDARS

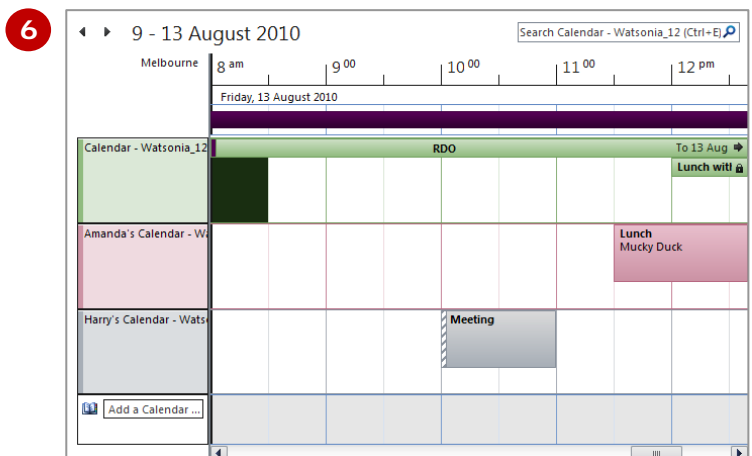
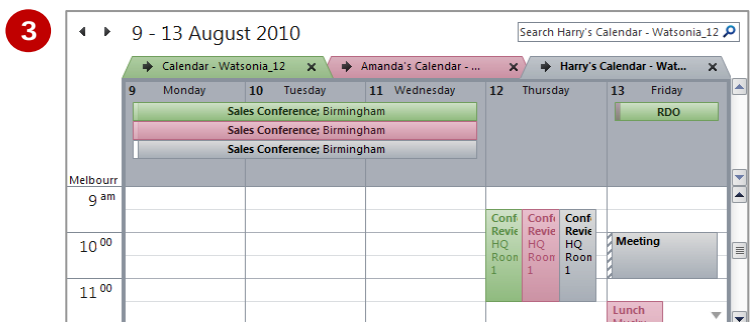
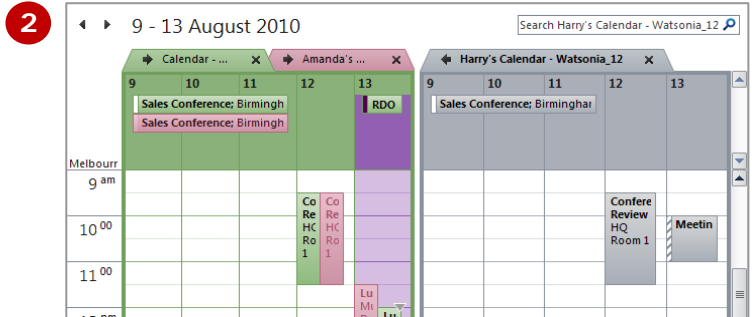
You can view multiple calendars simultaneously – both your own calendars plus calendars that have been shared with you. When viewing multiple calendars you

can view them in the default side-by-side layout, or either overlaid or in **Schedule view** so that you can see available and busy times clearly.

Try This Yourself:


Continue using the previous file with this exercise...

- 1 Select the three **Watsonia_12** calendars, click on **Work Week**  and navigate to **9 Aug 2010**
- 2 Click on the **View** tab, then click on **Overlay**  in the **Arrangement** group to overlay the first two calendars
All activities will appear colour-coded based on the colour of the calendar tab...
- 3 Click on **View in Overlay Mode**  to the left of **Harry's** calendar tab to overlay this calendar as well
You can clearly see when all three people are free...
- 4 Navigate to the next week to see scheduled activities
- 5 Click on **View in Side-By-Side Mode**  for both **Harry's** and **Amanda's** calendars
- 6 Click on **Schedule View**  in the **Arrangement** group to change the view, then scroll through the days
The calendars will split horizontally...
- 7 Click on **Day** 



For Your Reference...

To **overlay multiple calendars**:

1. Display the desired calendars
2. Click on **View in Overlay Mode**  at the top left of the desired calendar tabs

Handy to Know...

- If you have five or more calendars open, the calendar will automatically change to **Schedule view**.
- You can only view shared Exchange calendars and calendars published on Office.com in **Schedule view**.

CONCLUDING REMARKS

Congratulations!

You have now completed the **Working with the calendar** booklet. This booklet was designed to get you to the point where you can competently perform a variety of operations as listed in the objectives on page 2.

We have tried to build up your skills and knowledge by having you work through specific tasks. The step by step approach will serve as a reference for you when you need to repeat a task.

Where To From Here...

The following is a little advice about what to do next:

- Spend some time playing with what you have learnt. You should reinforce the skills that you have acquired and use some of the application's commands. This will test just how much of the concepts and features have stuck! Don't try a big task just yet if you can avoid it - small is a good way to start.
- Some aspects of the course may now be a little vague. Go over some of the points that you may be unclear about. Use the examples and exercises in these notes and have another go - these step-by-step notes were designed to help you in the classroom and in the work place!

Here are a few techniques and strategies that we've found handy for learning more about technology:

- visit CLD's e-learning zone on the Intranet
- read computer magazines - there are often useful articles about specific techniques
- if you have the skills and facilities, browse the Internet, specifically the technical pages of the application that you have just learnt
- take an interest in what your work colleagues have done and how they did it - we don't suggest that you plagiarise but you can certainly learn from the techniques of others
- if your software came with a manual (which is rare nowadays) spend a bit of time each day reading a few pages. Then try the techniques out straight away - over a period of time you'll learn a lot this way
- and of course, there are also more courses and booklets for you to work through
- finally, don't forget to contact CLD's IT Training Helpdesk on **01243-752100**