

## CHAPTER 8

## InFocus

# APPOINTMENTS AND EVENTS

Outlook **Calendar** is a scheduling tool that helps you manage **appointments**, **events** and **meetings** with other people. In Outlook appointments, events and meetings are collectively referred to as **activities**.

In Calendar, an **appointment** is an activity that you enter in your diary, such as weekly sales meetings on Monday mornings or a lunch date with friends.

An **event** is similar to an appointment except that it lasts for a minimum of one entire day. Conferences, golf days, training courses, and the like would be considered **events**.

### In this session you will:

- ✓ learn how to schedule an appointment using the **Click to Add Appointment** feature
- ✓ learn how to schedule an appointment using the **Appointment** window
- ✓ learn how to reschedule an appointment to another day
- ✓ learn how to reschedule an appointment to another time
- ✓ learn how to create recurring appointments
- ✓ learn how to change all recurring appointments in a series
- ✓ learn how to schedule an event in a calendar
- ✓ learn how to schedule free and busy times on your calendar
- ✓ learn how to categorise activities
- ✓ learn how to print appointments and events in your calendar
- ✓ learn how to delete appointments and events.

# SCHEDULING AN APPOINTMENT USING CLICK TO ADD


One of the more common tasks to perform in Outlook **Calendar** is the scheduling of an **appointment**. In **Calendar**, an **appointment** is an activity you enter in your diary that doesn't

involve inviting other people or reserving resources. It can be anything from a luncheon engagement, to a visit to the dentist or a meeting with a client offsite.

## Try This Yourself:

**Open File**

Before starting this exercise you **MUST** open the file *Watsonia\_13.pst...*


- 1 Ensure only **Calendar – Watsonia\_13** is ticked, then click on **Day** 

Let's add a basic appointment, specifying only a subject and start and end times...

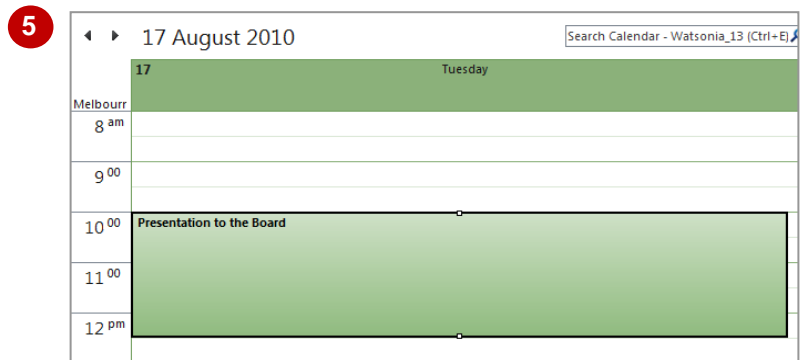
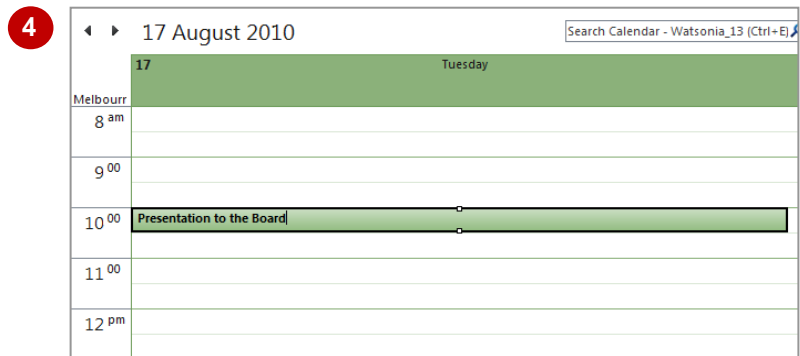
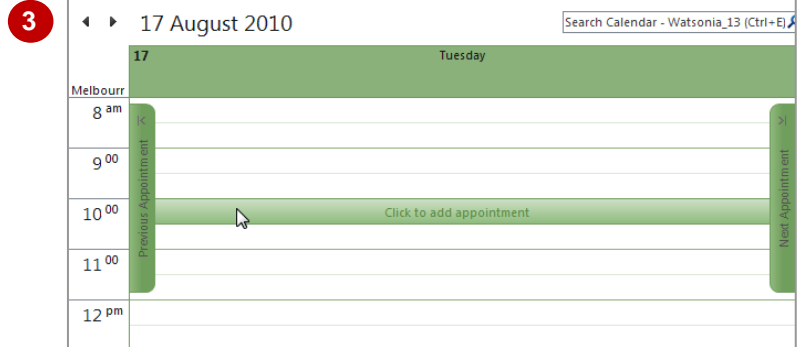
- 2 Click on next **Tuesday** in the **Date Navigator** in the **Navigation** pane

- 3 Hover over the blank **10:00 am** timeslot to display the **Click to add appointment** box

- 4 Click on the **Click to add appointment** box, then type **Presentation to the Board** and press

- 5 Hover over the bottom border of the appointment box until the pointer appears as a double-headed arrow , then drag it down until the appointment ends at **12.30 pm**

*The Calendar Tools: Appointments tab will open giving you access to relevant tools*



## For Your Reference...

To **schedule** an **appointment** using **Click to Add**:

1. Click on a blank timeslot
2. Type the desired appointment subject
3. Drag the top or bottom border to change the start or end time

## Handy to Know...

- If the calendar is displayed by **Month**, the **Click to add appointment** box will appear as the **Click to add event** box. If you double-click on the event box, you can change any or all parts of the activity, including whether it is an appointment, event and so on.

# SCHEDULING USING THE APPOINTMENT WINDOW



If you want to specify more detailed information as you create an appointment, you can do so by creating it using the **Appointment** window. In addition to giving an appointment a subject and a

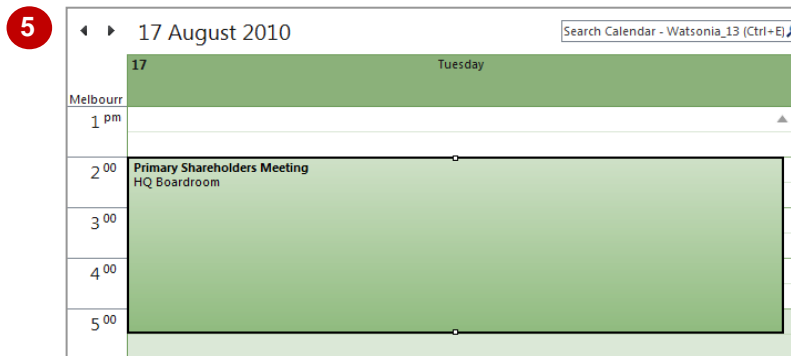
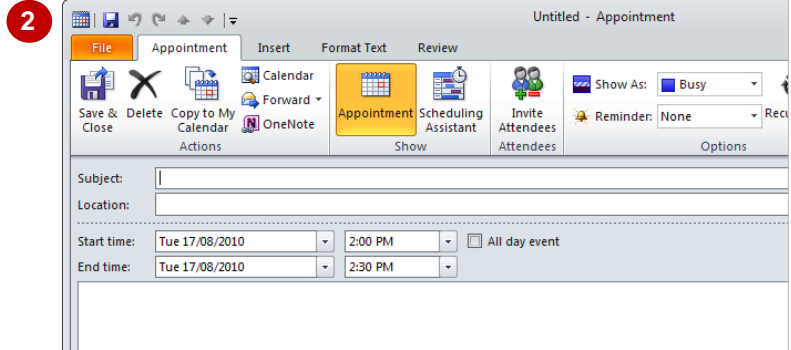
start and end time, you can also set a specific reminder time, appoint a location, type additional text, plus use various tools to help manage the appointment you are creating.


## Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *Watsonia\_13.pst...*


- 1 Continue working on next **Tuesday's** date and ensure that the Calendar shows one day at a time
- 2 Double-click on the **2:00 pm** timeslot to open the **Appointment** window
- 3 Type **Primary Shareholders Meeting** in **Subject** and type **HQ Boardroom** in **Location**
- 4 Click on the drop arrow  for the time to the right of **End time** and select **5:30 PM (3.5 hours)**
- 5 Click on **Save & Close**  to add the appointment to the calendar



*Tip: If other people have access to your calendar, you can mark appointments as 'Private' by clicking on **Private**  in the **Tags** group. Another more secure way to keep individual appointments private is to create them on a separate calendar.*

## For Your Reference...

To **create** an **appointment** with **many details**:

1. Double-click on the desired timeslot
2. Enter the appointment details
3. Click on **Save & Close** 

## Handy to Know...

- When you create an appointment Outlook will remind you, by default, 15 minutes before the appointment is due to start. It does this by displaying a message advising you of the appointment. You can select a different reminder time by clicking on **Reminder** in the **Options** group.

# RESCHEDULING AN APPOINTMENT TO ANOTHER DAY

Unfortunately, in the real world appointments (and other activities for that matter) aren't always set in concrete. Factors often intervene making it necessary to reschedule them. In Outlook

Calendar, you can reschedule an appointment in a number of ways. One way is to open the appointment and make changes to the start and/or end times and dates as required.


## Try This Yourself:

Same File


Continue using the previous file with this exercise, or open the file *Watsonia\_13.pst...*

1 Continue working on next **Tuesday's** date, then ensure that you can see the **Presentation to the Board** appointment at **10:00 am**

2 Double-click on the **Presentation to the Board** appointment to open it in the **Appointment** window

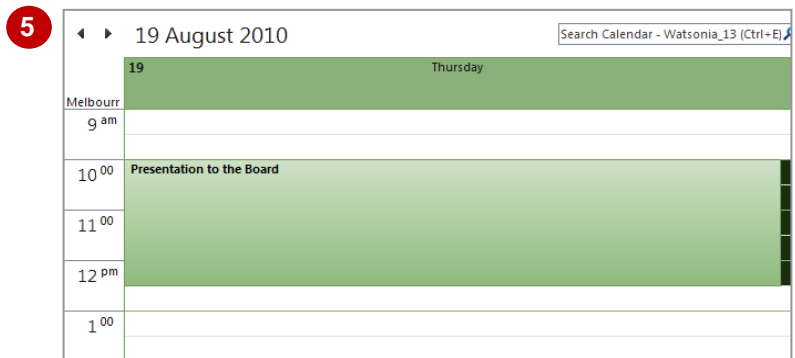
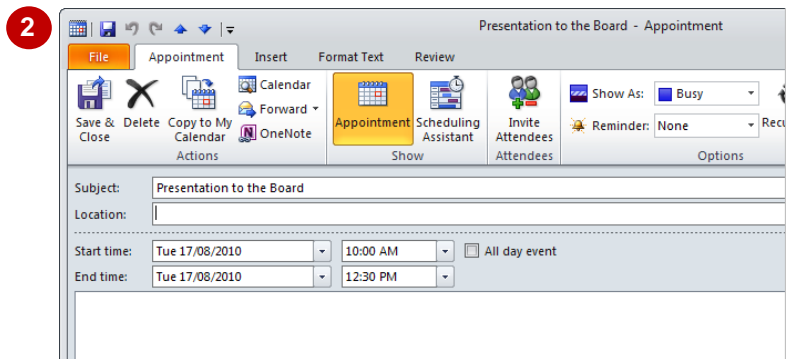
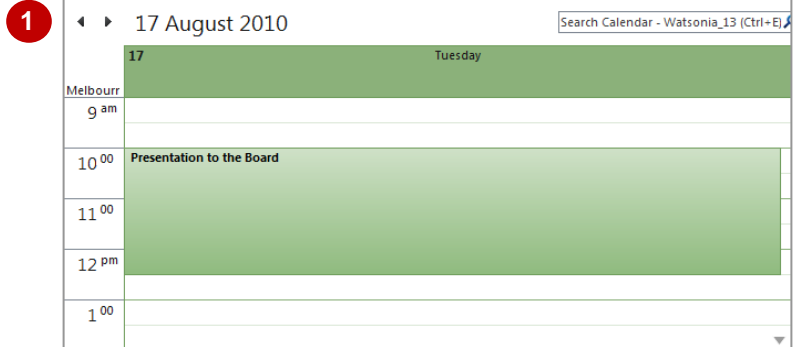
3 Click on the drop arrow  for **Start time** and select the following **Thursday**

*You can also change the time here if desired...*

4 Click on **Save & Close**  to reschedule the appointment



5 Click on next **Thursday** in the **Date Navigator** to check that the appointment has been rescheduled correctly

*In our example, you will see that the appointment was originally scheduled for 17 August and now it is scheduled for 19 August*



## For Your Reference...

To **reschedule** an **appointment** to another **day**:

1. Double-click on the appointment
2. Click on the drop arrow  for **Start time** and select the desired day
3. Click on **Save & Close** 

## Handy to Know...

- An even quicker method for moving an appointment to another day in the calendar is to display the calendar in **Weekly** view and then drag the appointment to a new time and date slot. If you drag the appointment in **Monthly** view, the meeting will be rescheduled at the same timeslot.

# RESCHEDULING AN APPOINTMENT TO ANOTHER TIME

In Outlook **Calendar**, you can reschedule an appointment by using normal cut and paste tools or by dragging appointments to a new location in the calendar screen. This is convenient if you

only have to reschedule appointments over a relatively short timeframe such as a few hours on the same day, or across a couple of days in the same month.

## Try This Yourself:

Same File

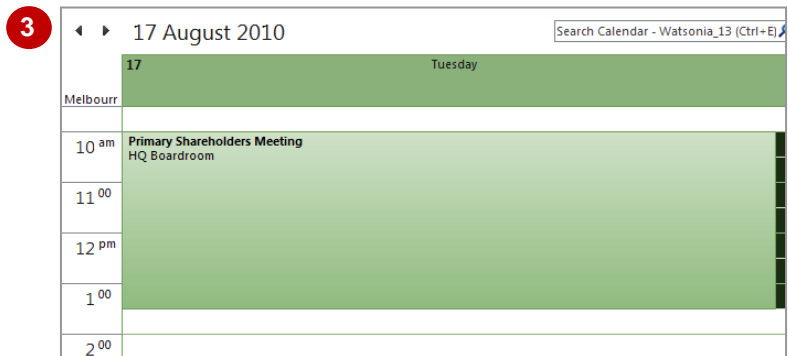
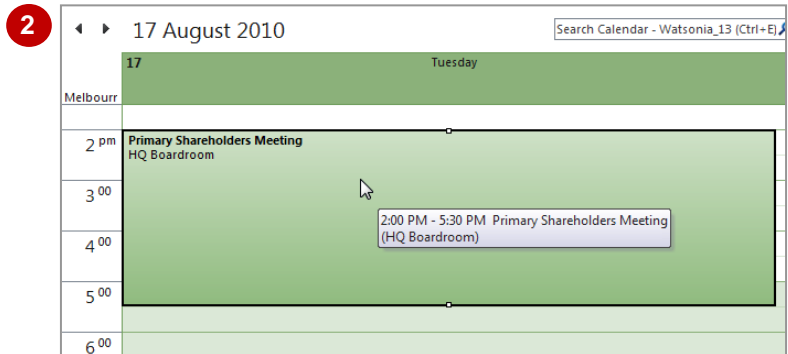
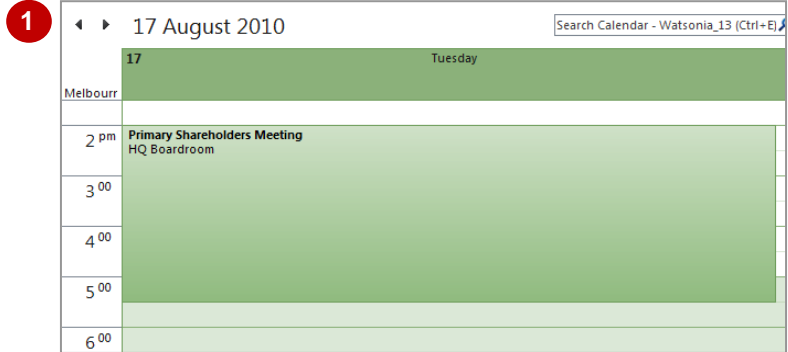
Continue using the previous file with this exercise, or open the file *Watsonia\_13.pst...*

**1** Click on next **Tuesday** in the **Date Navigator** and ensure that you can see the **Primary Shareholders Meeting** appointment at **2:00 pm**

**2** Click anywhere on the appointment box to select it

**3** Drag the appointment up so that it is timed to start at **10:00 am**

*You must drag the centre of the appointment box to move the appointment to a new timeslot. If you drag the top or bottom border, you will simply reschedule the appointment's start or end time*



## For Your Reference...

To **reschedule** an **appointment** to another **time**:

1. Click on the appointment to select it
2. Drag it to the desired start time

## Handy to Know...

- You can move an appointment to another day by dragging it off the calendar and onto a date in the **Date Navigator**. The start and end times will remain the same as they were on the original day.

# CREATING RECURRING APPOINTMENTS




Some appointments in your life happen on a recurring basis. For example, you may have a weekly mentoring session with your employees at the same time every week, or perhaps you have

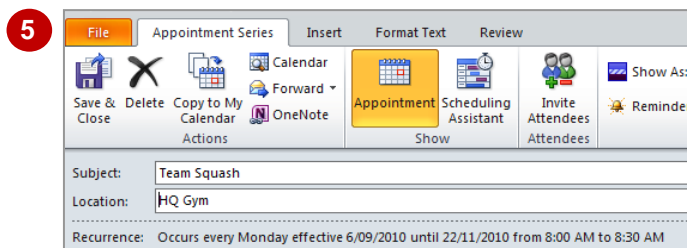
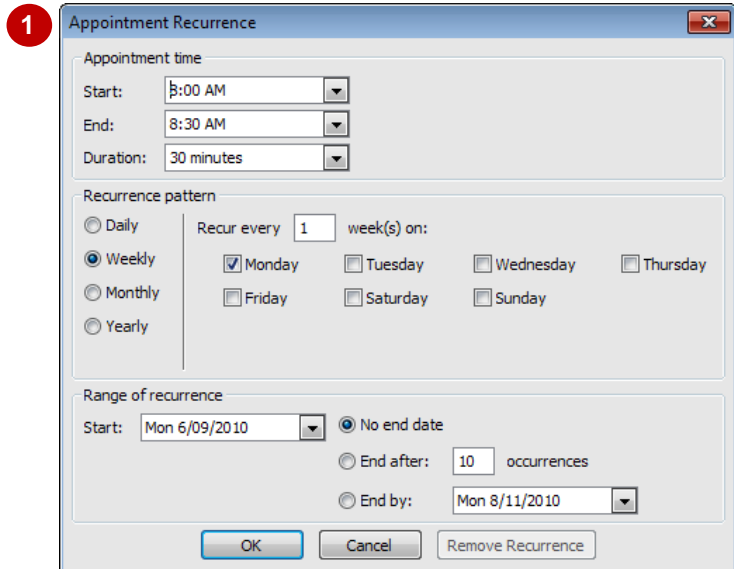
a one-hour training session on Monday afternoons for the next five weeks. These activities need to be entered only once in Outlook as a **recurring appointment**.

## Try This Yourself:

**Same File**

Continue using the previous file with this exercise, or open the file *Watsonia\_13.pst...*


- 1 Navigate to the first **Monday** of next month
- 2 Double-click on the **8:00 am** time slot to open the **Appointment** window and then enter the following details  
  
**Subject** Team Squash  
**Location** HQ Gym  
  
*Let's set this activity to occur weekly for the next three months...*
- 3 Click on **Recurrence**  in the **Options** group to open the **Appointment Recurrence** dialog box
- 4 Click on **End after** and change its value to **12** occurrences
- 5 Click on **[OK]**  
  
*The Recurrence details will be added to the bottom of the appointment header...*
- 6 Click on **Save & Close**  to add the recurring appointment to the calendar  
  
*Notice that the recurring appointment icon  has been added to the right of the appointment box*



## For Your Reference...

- To **create** a **recurring appointment**:
1. Create a new appointment in the **Appointment** window
  2. Click on **Recurrence**  in the **Options** group on the **Appointment** tab
  3. Complete the details, click on **[OK]** and then click on **Save & Close** 

## Handy to Know...

- You can change an existing appointment to recurring by clicking on the appointment in the calendar to select it, and then clicking on **Recurrence**  in the **Options** group on the **Calendar Tools: Appointment** tab.

# CHANGING RECURRING APPOINTMENTS

A **recurring appointment** has an activity that occurs on a recurring basis, such as weekly team meetings on Monday mornings. The activities that make up the recurring appointment are

described as a **series**. If you need to change a recurring appointment, you can choose to either change a specific activity (or **occurrence**) or change all activities by opening the **series**.

## Try This Yourself:

Same File


Continue using the previous file with this exercise, or open the file *Watsonia\_13.pst...*

1 Ensure that you can see the first occurrence of the recurring appointment **Team Squash at 8:00 am**


2 Double-click on the **Team Squash** appointment


Outlook asks if you want to open just this occurrence or the series. Let's change them all...

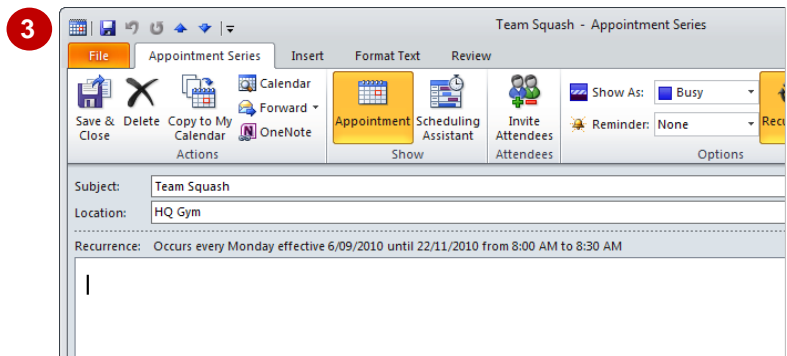
3 Click on **Open the series** and then click on [OK] to open the **Appointment Series** window

4 Change the **Location** to **Fitness Centre**, then click on **Recurrence**  to open the **Appointment Recurrence** dialog box

We also need to change the start time to 7:30 am...


5 Click on the drop arrow  for **Start** and select **7:30 AM** – notice that **End** changes automatically to **8:00 AM** which is what we want – then click on [OK]

6 Click on **Save & Close** 



## For Your Reference...

To **change** all **recurring appointments** in a series:

1. Double-click on the recurring appointment
2. Click on **Open the series** and then click on [OK]
3. Make the desired changes
4. Click on **Save & Close** 

## Handy to Know...

- If you use the mouse to drag a particular recurring appointment to another timeslot, you will update the time/date for that particular appointment only – not for all recurring appointments in the series.

# SCHEDULING AN EVENT




An **event** is an activity that occupies a full day or more. It is treated differently to an appointment or meeting in that it appears in the banner area at the top of the calendar rather than against a

particular timeslot. **Events** are normally created for activities of longer duration such as a trade show, sporting events, training and the like.

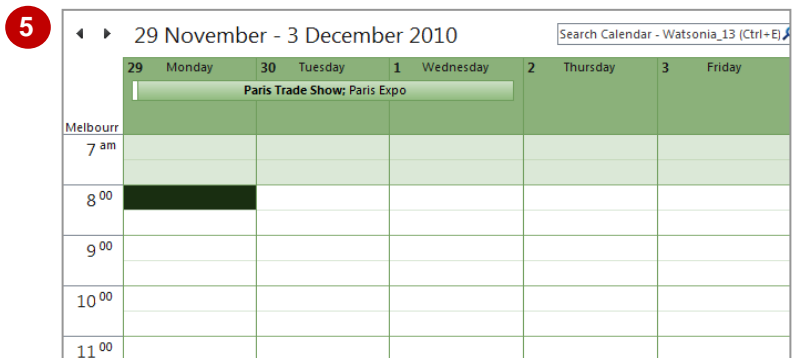
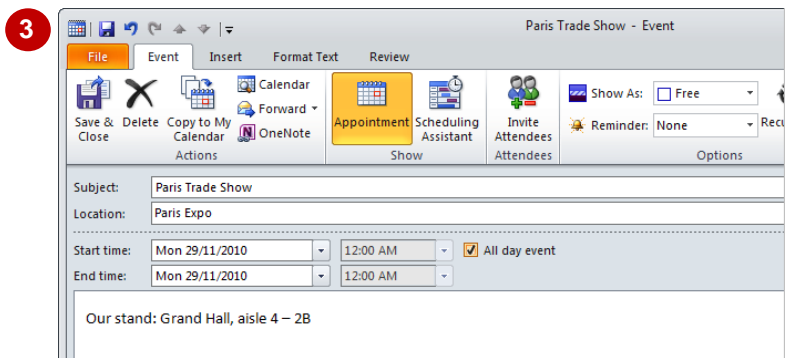
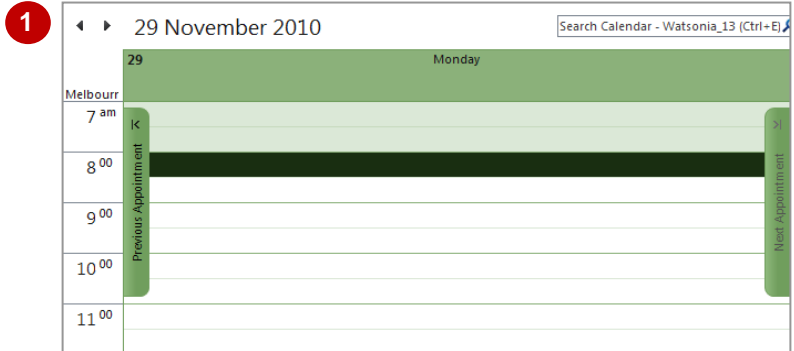
## Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *Watsonia\_13.pst...*

- 1 Use the **Date Navigator** to move ahead four months from now and select the first **Monday** of that month
- 2 Double-click on any timeslot to open the **Appointment** window
- 3 Type **Paris Trade Show** in **Subject**, type **Paris Expo** in **Location**, type **Our stand: Grand Hall, aisle 4 - 2B** in the white text area, and then tick **All day event** in the header
- 4 Click on the drop arrow  for **End time** and select **Wednesday**, then click on **Save & Close**  to add the three-day event to the calendar
- 5 Click on **Work Week**  to change the view of the calendar to **Work Week**

Notice how the event appears above the timeslots in the calendar, unlike appointments




## For Your Reference...

To **schedule** an **event**:

1. Create a new appointment in the **Appointment** window
2. Enter the desired details
3. Tick **All day event**
4. Click on **Save & Close** 

## Handy to Know...

- You can add new activities by clicking on **New Items**  in the **New** group on the **Home** tab and selecting the desired option – **Appointment**, **Meeting**, **All Day Event**, etc.
- You can edit an all-day event by dragging it to a different day or by double-clicking on it to open it in the **Event** window.



# SCHEDULING FREE AND BUSY TIMES



Not every appointment or event takes up your time. You may want to add activities to your calendar that are for information only. By default, Outlook marks your activities as **Busy** so that if

anyone else can view your calendar, you appear to be unavailable. But, you can change how an activity is marked so that others can see whether you are free, tentatively busy or out of the office.

## Try This Yourself:



Same File

Continue using the previous file with this exercise, or open the file *Watsonia\_13.pst...*

1 Click on **Today** , navigate to **Wednesday** next week, then click on **Work Week** 

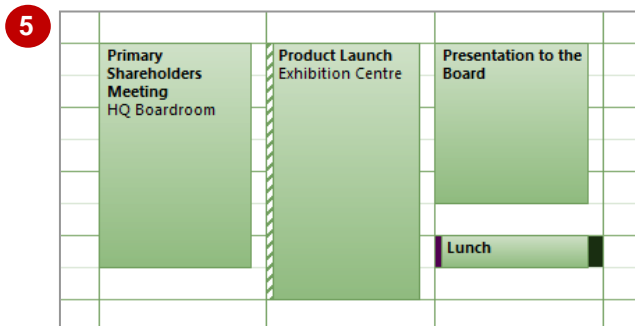
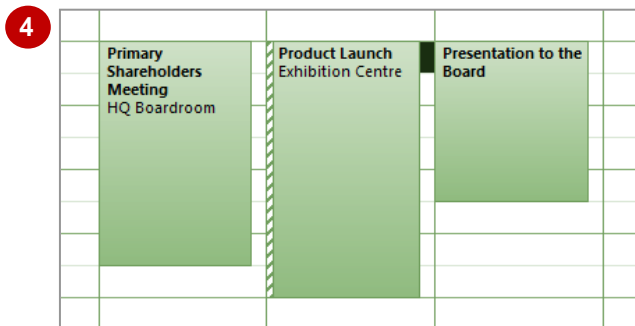
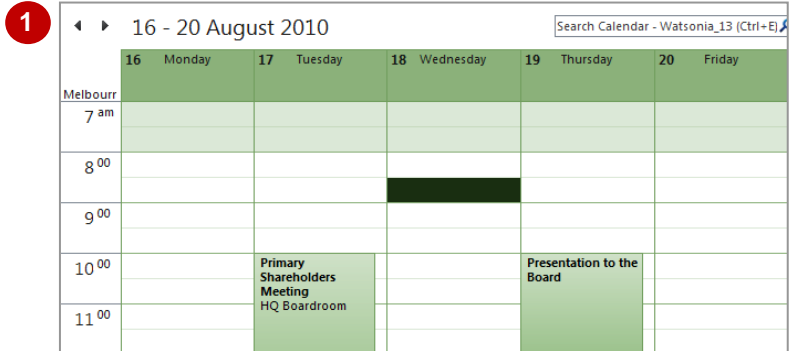
2 Double-click on the **10:00 am** time slot for **Wednesday** to open the **Appointment** window

3 Enter the following details  
**Subject** Product Launch  
**Location** Exhibition Centre  
**End time** Wed 2:00 PM

4 Click on the drop arrow  for **Show As** in the **Options** group and select **Tentative**, then click on **Save & Close** 



*Notice how the left edge of the activity appears as a hatched line, while the edge of the default (Busy) activity is a plain line...*

5 Repeat the above steps to add a new appointment for **Lunch** on **Thursday, 1:00 – 1:30 pm**, but this time select **Out of Office** in **Show As**



## For Your Reference...

To **schedule free and busy time** in the **calendar**:

1. Create a new appointment in the **Appointment** window
2. Click on the drop arrow  for **Show As** and select **Free**, **Tentative** or **Out of Office**
3. Click on **Save & Close** 

## Handy to Know...

- If your calendar can be accessed and viewed by other people, it is important that you specify the **Show As** time for each activity correctly as this will determine your availability.

# CATEGORISING ACTIVITIES

Outlook includes a **Categories** feature that lets you highlight certain items so that they can be easily found. For example, you may want to show that a group of messages, appointments, events,

notes, and so on are relevant to a particular project or department. You can categorise a calendar entry when you create it or later as you scan through the calendar pages.


## Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *Watsonia\_13.pst...*


**1** Navigate to **Friday** next week, then double-click on the **12:00 pm** timeslot to open the **Appointment** window

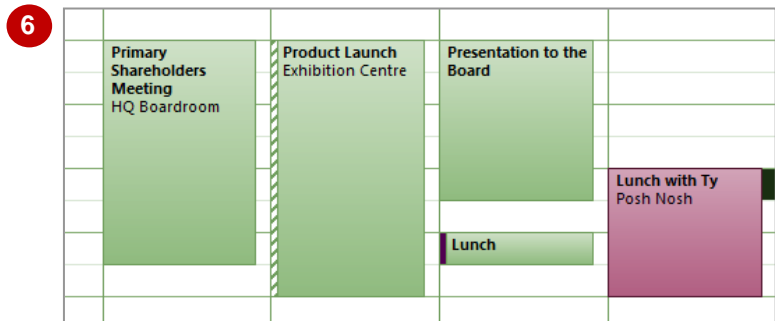
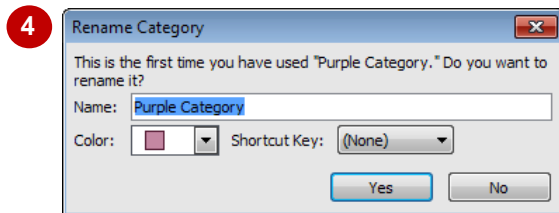
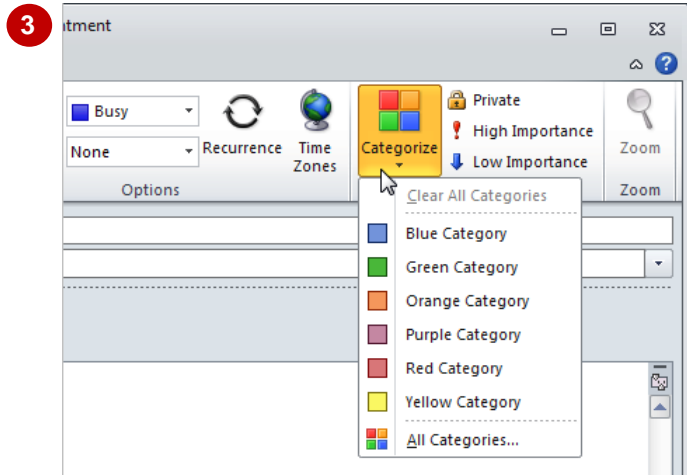
**2** Enter the following details  
**Subject** Lunch with Ty  
**Location** Posh Nosh  
**End time** Fri 2:00 PM

**3** Click on **Categorise**  in the **Tags** group to display a list of available colour categories

**4** Click on **Purple Category**  
*If this is the first time that you have used this category you will be asked if you want to rename it to something more appropriate. We won't bother now...*

**5** Click on **[No]** to apply the **Purple Category** to the appointment

**6** Click on **Save & Close**   
*Notice that the entire appointment has been shaded in purple*




## For Your Reference...

To **categorise** an **activity**:

1. Create a new appointment in the **Appointment** window
2. Click on **Categorise**  in the **Options** group and select the desired category
3. Click on **Save & Close** 

## Handy to Know...

- You can clear a category from an activity. To do this, click on the activity, click on **Categorise**  and select **Clear All Categories**.
- You can apply more than one category to a calendar activity.

# PRINTING YOUR CALENDAR



If you're on the road a lot it's not practical to start your laptop just to check your appointments. So most people will want to **print** their schedule and take it with them. By default, what you print will

be determined by the current view. For example, you can print all activities for a single day using **Day** view but you can choose other options such as weekly from the **Print** settings in the **Backstage**.

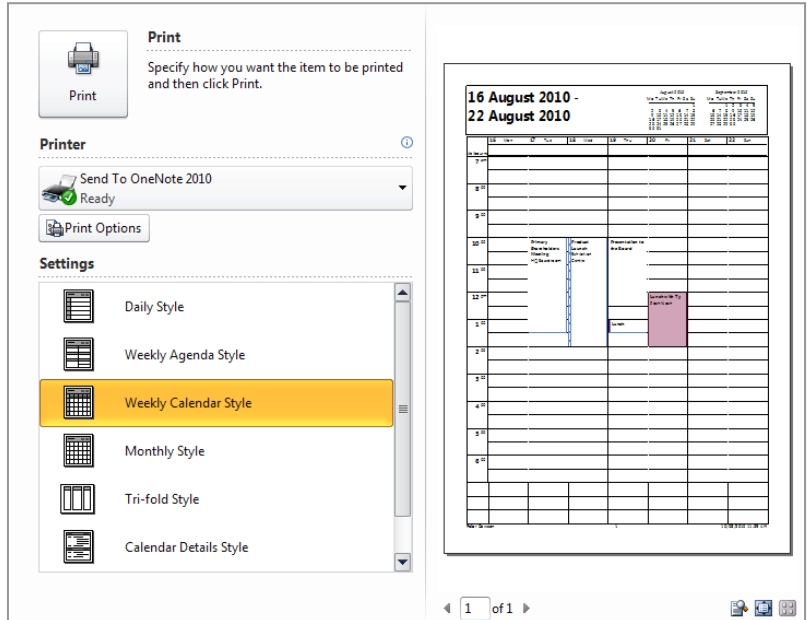
## Try This Yourself:

Same File

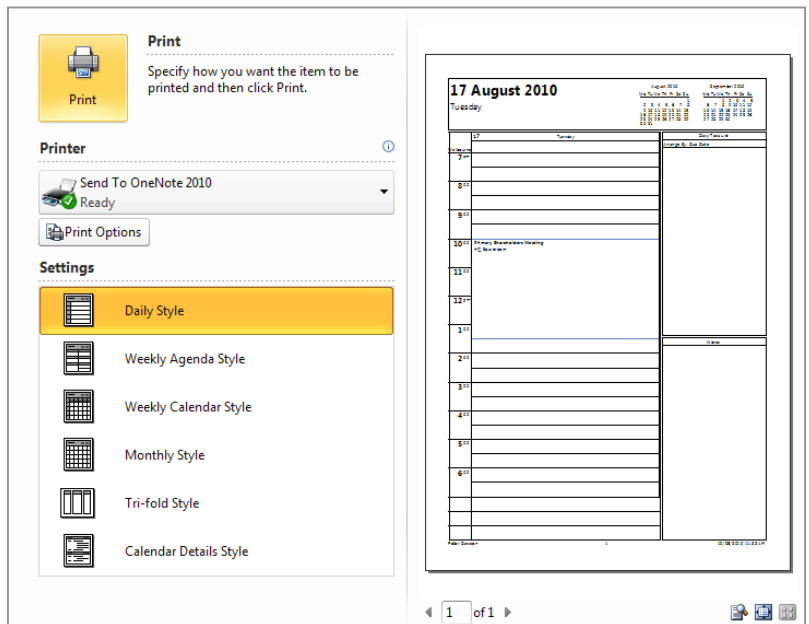
Continue using the previous file with this exercise...

- 1 Click on a day in the **Date Navigator** that has appointments or events scheduled (the date will appear bolded in the **Date Navigator**), then click on **Work Week** 
- 2 Click on the **File** tab, then click on **[Print]** to display the printer options – notice that **Weekly Calendar Style** is selected by default under **Settings**
- 3 Ensure that the correct printer is selected, then click on **[Print]**
- 4 Click on **Day**  then ensure that there is an activity scheduled for that day
- 5 Repeat step 2 to display the printer options – notice that **Daily Style** is now selected under **Settings**  
*Let's print the current month rather than the selected day...*
- 6 Click on **Monthly Style** under **Settings**, then click on **[Print]**

2



5




## For Your Reference...


To **print** your **appointments**:

1. Display the desired period
2. Choose the appropriate view
3. Click on the **File** tab, then click on **[Print]**
4. Click on **[Print]**

## Handy to Know...

- You can display the preview of the calendar in the **Backstage** at 100% so you can read the details. To do this: click on the **File** tab, click on **[Print]**, then click on **Actual Size**  which is located in the bottom right corner of the window.

# DELETING ACTIVITIES


There will be times when appointments or events are cancelled rather than rescheduled. When this occurs you can delete the appointment or event from the calendar using the **Delete** tool  on the

ribbon. Like other deleted items in Outlook, any appointment or event that you delete will be moved to the **Deleted Items** folder.


## Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *Watsonia\_13.pst...*

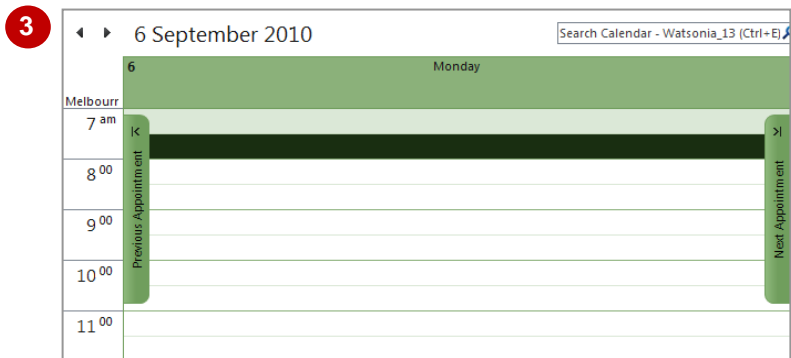
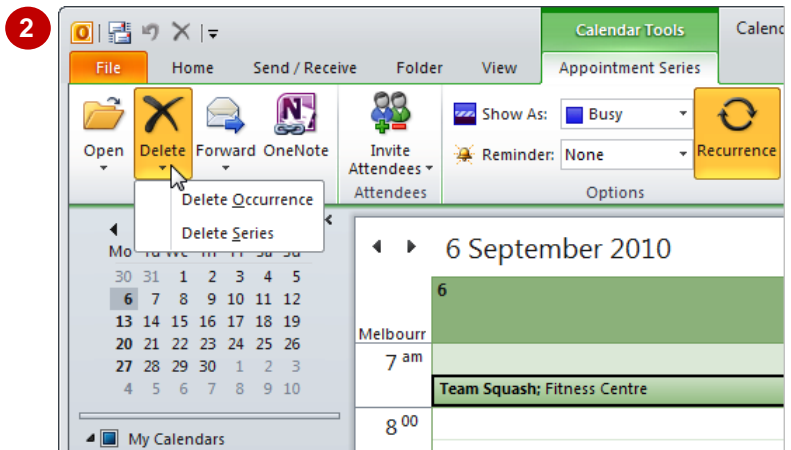
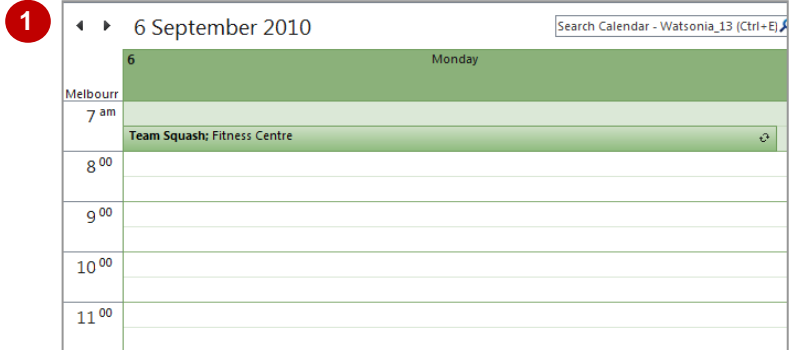
1 Click on **Today** , then navigate to the **Monday** next month with the first **Team Squash** appointment at **7:30 am**

Use the Date Navigator – all days with activities scheduled are bolded...

2 Click on the appointment to select it, then click on **Delete**  in the **Actions** group

Since this is a recurring appointment you must select to delete only this occurrence or the entire series...

3 Select **Delete Occurrence** to delete the appointment



## For Your Reference...

To **delete appointments** or **events**:

1. Click on the appointment or event
2. Click on **Delete** 

## Handy to Know...

- You can delete selected appointments or events using the keyboard shortcut **Ctrl** + **D**.