SCHEDULING MEETINGS

CHAPTER 9

INFOCUS

Microsoft Outlook's *Calendar* feature allows you to schedule meetings. *Meetings* are more complex to schedule than appointments or events as they normally require the participation of other members of your network, plus resources such as meeting rooms.

To help with meetings Calendar uses some of the Outlook Mail features to assist you in the planning and organising of meetings. The Outlook Calendar will automatically communicate with the participants using Outlook Mail and advise them of the meeting details. The participants themselves can reply to you through Outlook Mail to advise you of their attendance.

In this session you will:

✓ learn how to schedule meetings

✓ gain an understanding of the response options in a meeting request

✓ learn how to respond to a meeting request

✓ learn how to track responses to a meeting request

✓ learn how to change the details of an existing meeting

✓ learn how to add or remove meeting attendees

✓ learn how to prevent responses to a meeting

✓ learn how to cancel a meeting

✓ gain an understanding of how the *Scheduling Assistant* works

✓ learn how to use the *Outlook Scheduling* feature to plan and schedule a meeting

✓ learn how to schedule a meeting for a calendar group.

SCHEDULING A MEETING

Meetings are scheduled using the **Meeting** window. While the concept is similar to that of scheduling an appointment, the main difference is that you can **invite** people to a meeting and schedule resources, such as a meeting room. The people you invite must be available in Outlook somewhere, usually through the post office mail box or through your contacts listing.

Try This Yourself:

Before starting the exercises in this entire chapter, you MUST have an Exchange account…

1 Click on your personal calendar under **My Calendar** in the **Navigation** pane

2 Navigate to the first **Wednesday** next month, click on the **12:30 pm** timeslot, then click on **New Meeting** 🗓 on the **Home** tab to open a new **Meeting** window

3 Enter the details as shown to the right

4 Click on **[To]** to open the **Select Attendees and Resources** dialog box

5 Double-click on a name (make sure they know this is an exercise), then click on **[OK]**

If it's not essential for an invitee to attend, insert their name in the Optional field…

6 Click on **Send** 📧 to send the meeting invitation and record the meeting in the calendar

The recipient will receive an email message requesting them to respond to your meeting invitation

1

◢ My Calendars
   📅 Calendar - pdawson@alphe
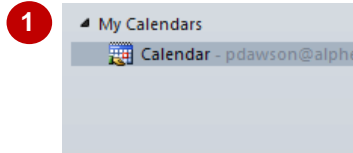
3

Subject	Think Tank Lunch
Location	The Mucky Duck
End time	2:30 pm
Text	Let's share some ideas over lunch. Let me know ASAP.

ⓘ Invitations have not been sent for this meeting.

[Send]   [To...]
   Subject: Think Tank Lunch
   Location: The Mucky Duck

   Start time: Wed 1/09/2010 ▼ 12:30 PM ▼ ☐ All day event
   End time: Wed 1/09/2010 ▼ 2:30 PM   ▼

Let's share some ideas over lunch. Let me know ASAP.

5

ⓘ Invitations have not been sent for this meeting.

[Send]   [To...]   Amanda Bennett
   Subject: Think Tank Lunch
   Location: The Mucky Duck

   Start time: Wed 1/09/2010 ▼ 12:30 PM ▼ ☐ All day event
   End time: Wed 1/09/2010 ▼ 2:30 PM   ▼

Let's share some ideas over lunch. Let me know ASAP.

For Your Reference…

To **schedule** a **meeting**:

1. Click on a blank timeslot in the calendar, then click on **New Meeting** 🗓
2. Click on **[To]**, double-click on the desired names, then click on **[OK]**
3. Type the details and click on **Send** 📧

Handy to Know…

- If you have access to the invitees' calendars, the **Room Finder** pane (which appears by default on the right side of the **Meeting** window) will show suggestions for the best time for your meeting – this is the time when most invitees are available. To select a time, click on a time under **Suggested times**.

MEETING RESPONSE OPTIONS

When you receive a meeting request, there are a number of options from which you can choose. These options are included in the ribbon at the top of the meeting request. Using the tools you can accept the meeting request, decline it, tentatively accept it or propose a different time. Outlook includes a snapshot of your calendar in the message to help you determine your availability.

Respond options

Calendar snapshot – the meeting is marked as tentatively accepted in your calendar
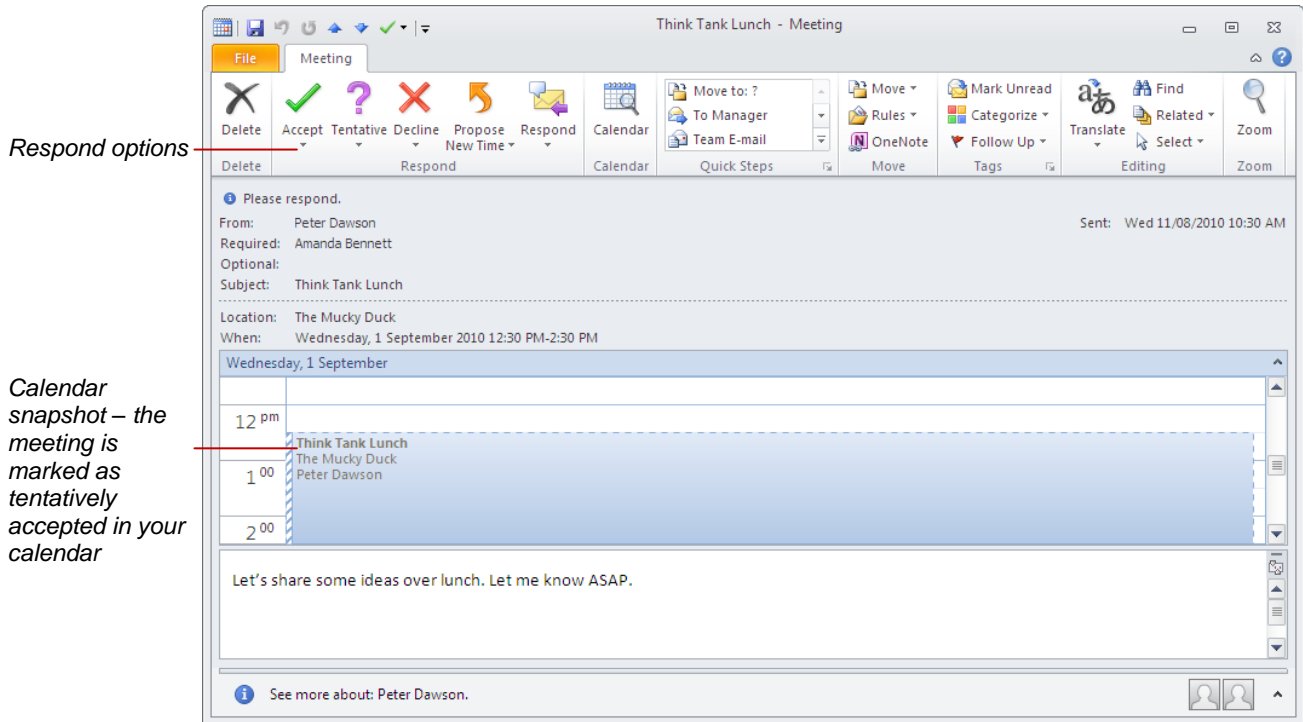
Accept	Allows you to accept the meeting as proposed. The meeting will automatically be added to your calendar. You will be given the opportunity to send an immediate response to the meeting organiser, edit the message to send, or accept the meeting without responding to the organiser.
Tentative	Allows you to tentatively accept the meeting as proposed. The meeting will automatically be added to your calendar. You will be given the opportunity to send an immediate response to the meeting organiser, edit the message to send, or accept the meeting without responding to the organiser.
Decline	Allows you to decline the meeting invitation.
Propose New Time	If the current time is not suitable you can either reply tentatively and propose a new time for the meeting or decline the invitation and propose a new time. When you choose either option a dialog box showing all meeting participants will appear. The current calendar details for these people will display allowing you to see what free time they have for the meeting. When you propose a new time, a message will be sent informing the organiser that you want to propose a new time.
Respond	This option allows you to ***reply*** to the message, ***reply*** to ***all*** recipients of the message, ***forward*** the message or ***forward*** the message ***as an attachment***.

RESPONDING TO MEETING REQUESTS

An invitation to a meeting arrives in the form of a mail message. Outlook *Mail* treats a meeting invitation in a special way and allows you to respond to the meeting request by accepting the invitation, accepting it tentatively, changing the meeting details or declining the invitation.

Try This Yourself:

To complete this exercise you will need someone else in your workgroup to send you a meeting request – ideally they should have completed the previous task inviting you to their lunch...

1 Click on the *Inbox*, then ensure the *Reading* pane is open

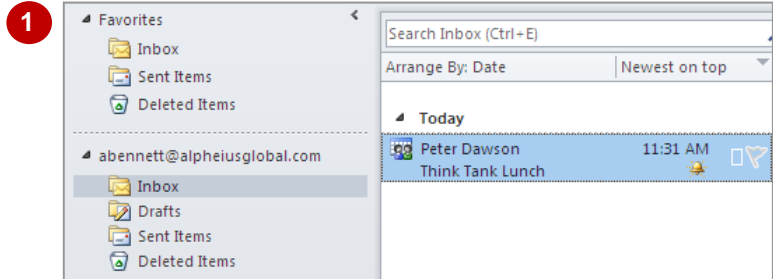*Meeting requests display in the message list with a special meeting icon …*

2 Click on the meeting request to display it in the *Reading* pane

Notice the various buttons at the top of the request and the snapshot showing how the proposed meeting fits into your calendar. These two features make it very easy for you to decide how you want to respond.

If you didn't have the Reading pane open, you could have also double-clicked on the request to open it in a Meeting window…

3 Click on *Accept* at the top of the message, then select **Send the Response Now**

Outlook will send your response to the person who sent you the invitation and will then add the meeting to your calendar

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1

	Search Inbox (Ctrl+E)
▲ Favorites	Arrange By: Date · Newest on top
✉ Inbox	
☐ Sent Items	▲ Today
☐ Deleted Items	Peter Dawson 11:31 AM
	Think Tank Lunch
▲ abennett@alpheiusglobal.com	
✉ Inbox	
☐ Drafts	
☐ Sent Items	
☐ Deleted Items	

2

✓ Accept ▾ | ? Tentative ▾ | ✗ Decline ▾ | ↰ Propose New Time ▾ | 📅 Calendar...

Think Tank Lunch

Peter Dawson

ⓘ Please respond.

Required: Amanda Bennett
When: Wednesday, 1 September 2010 12:30 PM-2:30 PM
Location: The Mucky Duck

Wednesday, 1 September

12 pm

Think Tank Lunch
The Mucky Duck
1 00 Peter Dawson

2 00

Let's share some ideas over lunch. Let me know ASAP.

ⓘ See more about: Peter Dawson.

For Your Reference…

To *respond* to a *meeting request*:
1. Double-click on the meeting request
2. Click on *Accept* (or other tool in the **Respond** group as desired)
3. Click on the appropriate response

Handy to Know…

- You can see how the meeting fits into your schedule from the *calendar snapshot* that is included near the top of the message. You can scroll up and down to see where you have activities already scheduled on the day.

TRACKING MEETING RESPONSES

When you have organised a meeting with only one person it is very simple to keep track of who has accepted and who has declined your meeting request. But, when several people are involved things can get a little trickier. Outlook, therefore, has some tools and facilities that allow you to keep track of what is happening with responses and the meeting overall.

Try This Yourself:

Same File

Continue using the previous data file with this exercise…

1 Click on the meeting response in your *Inbox*

A meeting response acceptance appears in the message list with an acceptance icon …

2 Double-click on the *Accepted* message to open it in a *Meeting Response* window – this window shows a summary of the responses received so far

3 Press Esc, then open the calendar and click on the *Think Tank Lunch* meeting (first Wednesday next month) to select it

The Calendar Tools: Meeting contextual tab will open…

4 Click on *Tracking* in the *Attendees* group to see who has and has not accepted

5 Press Esc to return to the calendar
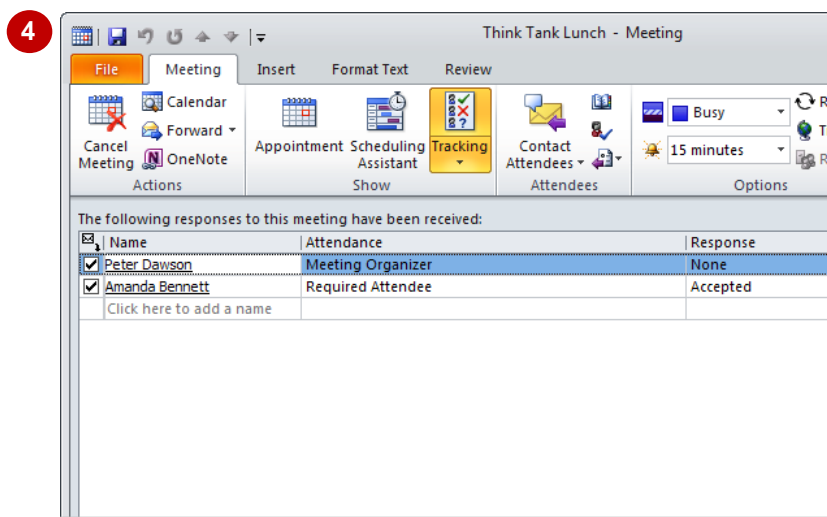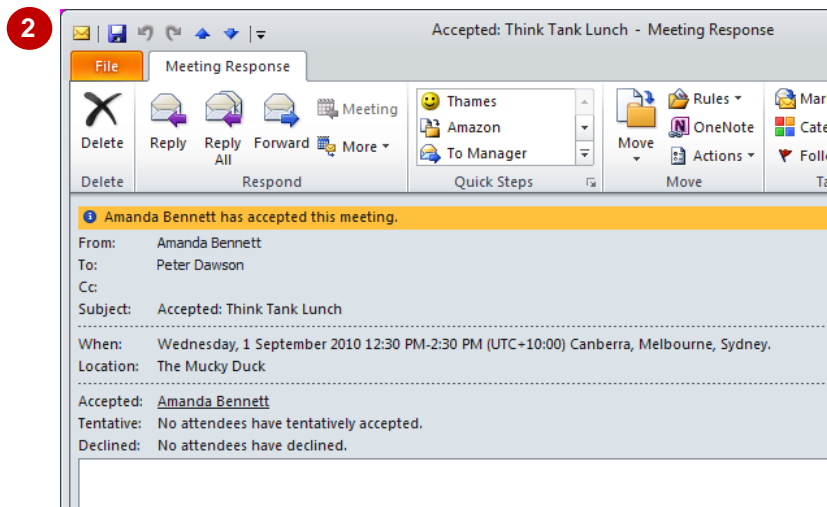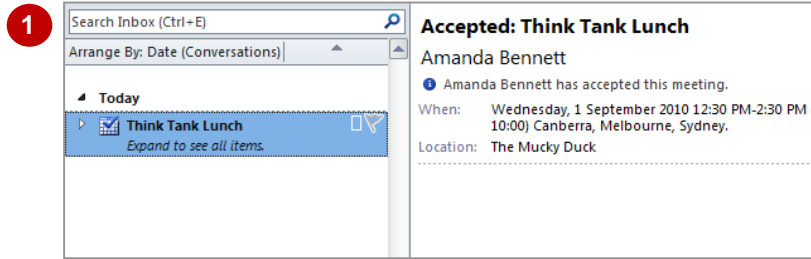
For Your Reference…

To *track meeting responses*:

1. Double-click on the meeting response in your *Inbox*

    or

    Click on the meeting, then click on *Tracking* in the *Attendees* group

Handy to Know…

- There are a number of places where you can see who has accepted a meeting. The easiest is to open the message response in the *Inbox*, but the more comprehensive is to open the meeting in the *Calendar* since meetings are automatically updated from responses.

CHANGING A MEETING

If you are the meeting organiser, you can change the details of the meeting at any time. For example, you may want to change the location of a meeting, the date, the times, plus more. If you make a minor change, such as a change of location, invitees aren't required to respond − they will simply receive a message highlighting the changed meeting details.

Try This Yourself:

Same File

Continue using the previous data file with this exercise…

**1** Navigate to the ***Think Tank Lunch*** meeting next month, and then double-click on the meeting to open it in the ***Meeting*** window

2 Select the text ***The Mucky Duck*** in ***Location*** and type **The Spotted Dog**

3 Click on ***Send Update*** 📧

Outlook will send a message to the invitees highlighting the information that has changed – in this case, the new Location will appear in orange type and the original Location will appear with strikethrough and in parentheses

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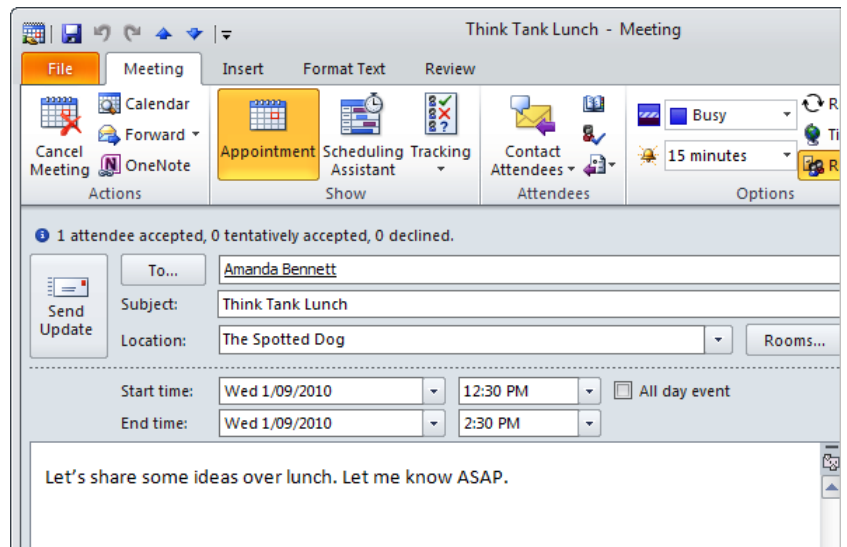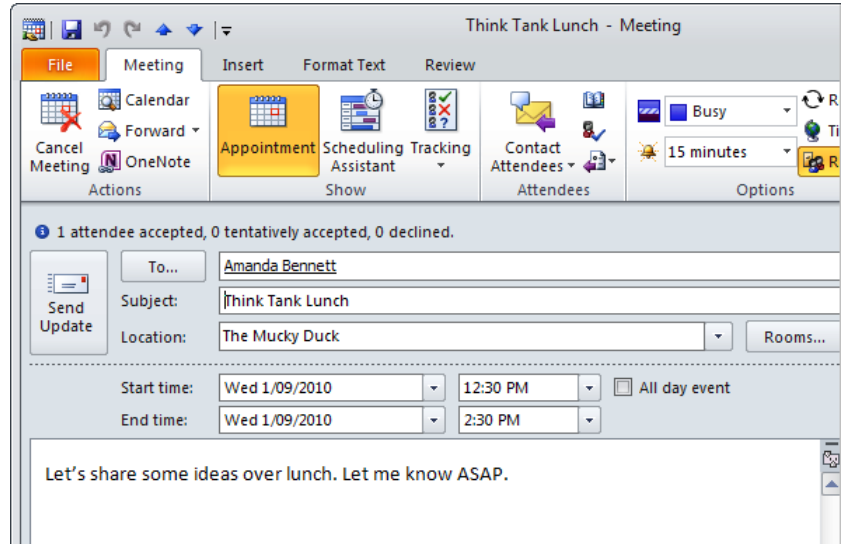
For Your Reference…

To **change** a **meeting**:

1. Double-click on the meeting in the calendar
2. Make any necessary changes
3. Click on ***Send Update*** 📧

Handy to Know…

- If a meeting invitee uses the ***Reading*** pane to view a message informing them of a change to the meeting, a comment will appear at the top left of the message notifying them that they don't have to respond to the message.

ADDING OR REMOVING ATTENDEES

Once a meeting request has been sent, you may decide to change the attendees. For example, you may want to include some additional names and remove others. Once you've changed the list of attendees in an existing meeting, Outlook lets you decide whether or not to send the updated information to everyone who has been invited or just to the new and/or deleted attendees.

Try This Yourself:

Same File

Continue using the previous data file with this exercise…

**1** Click on the **Think Tank Lunch** meeting next month to select it

2 Click on **Add or Remove Attendees** 📇 in the **Attendees** group to open the **Select Attendees and Resources** dialog box and the **Meeting** window

The currently invited attendees will appear in the boxes. To remove an attendee, simply delete their name from the box...

3 Double-click on a different name and then click on **[OK]** to return to the meeting request

4 Click on **Send Update** 📧

Outlook will ask you who you want to send the updates to...

5 Ensure that **Send updates only to added or deleted attendees** is selected, then click on **[OK]**

②

③

④
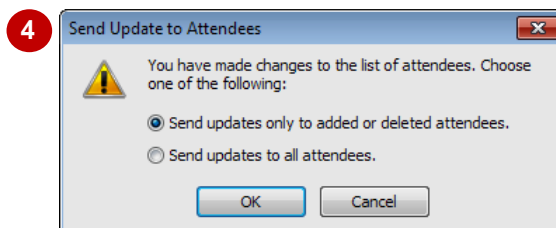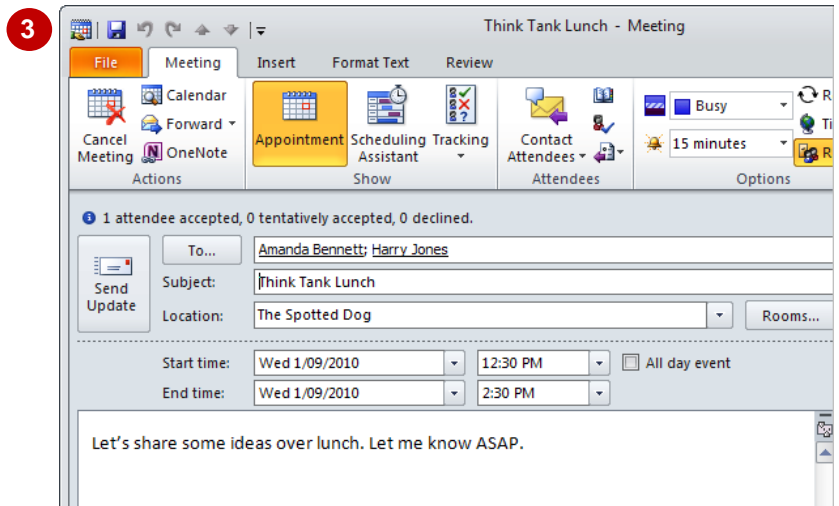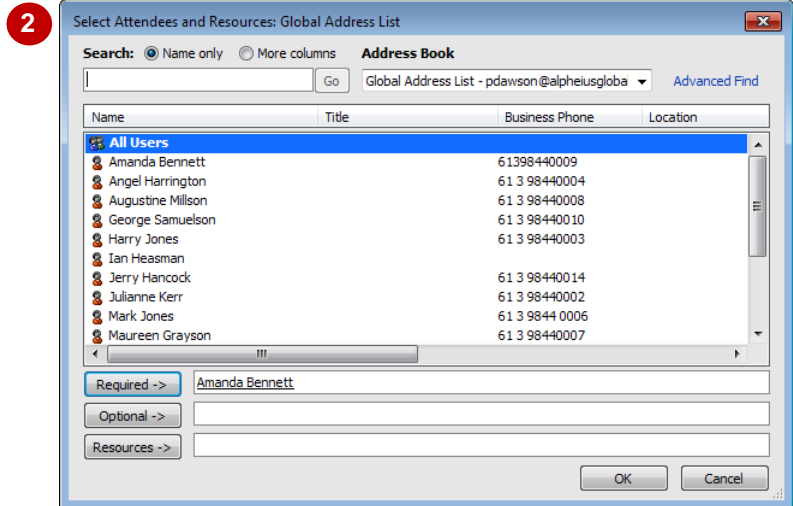
For Your Reference…

To **add** or **remove attendees** from a meeting:

1. Double-click on the meeting in the calendar
2. Click on **Add or Remove Attendees** 📇 in the **Attendees** group
3. Click on **Send Update** 📧
4. Select the desired option, then click on **[OK]**

Handy to Know…

- If you make other changes to a meeting while adding or removing attendees, you should send the updates to all attendees.

       Scheduling Meetings

PREVENTING RESPONSES

Normally, when you send a meeting request the *Request Response* option is turned on so that you can track attendees' responses. But, if you are sending a meeting request to a large number of people and it is not critical that you know who can and cannot attend, you can turn off the *Request Response* option when you send the meeting request.

Try This Yourself:

Same File

Continue using the previous data file with this exercise…

1 Go to the first *Thursday* next month and create a new meeting at *6:00 pm*

2 Click on **[To]** and select a name, then enter the following details

   Subject   Farewell drinks for Alex Parker
   Location   HQ Boardroom
   End time   7:30 pm

3 Click on *Response Options* in the *Attendees* group to display the available options

4 Select **Request Responses** – this will remove the tick from both *Request Responses* options

5 Click on *Send* to send the meeting request and record the meeting in your calendar

   The recipients will receive a message informing them that they do not need to respond to your request. If they respond, it will affect only their calendar and not yours
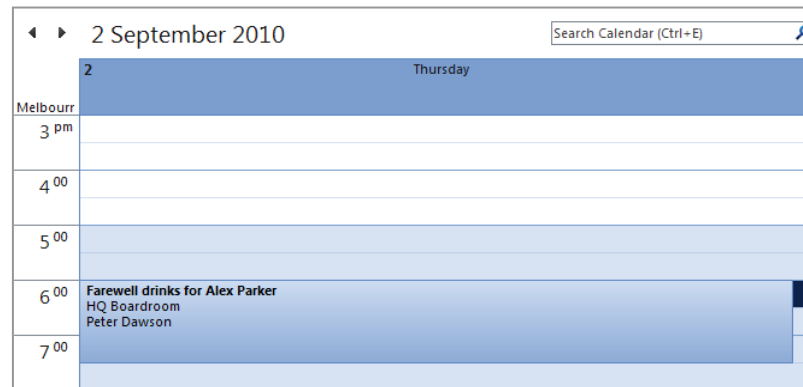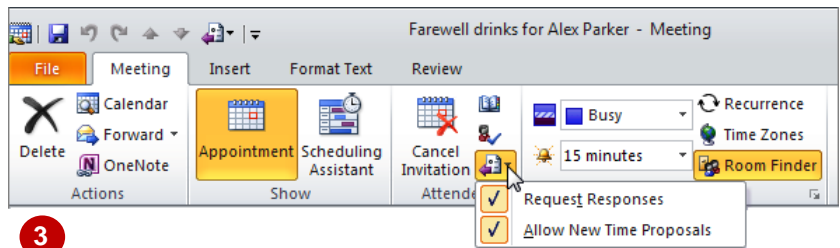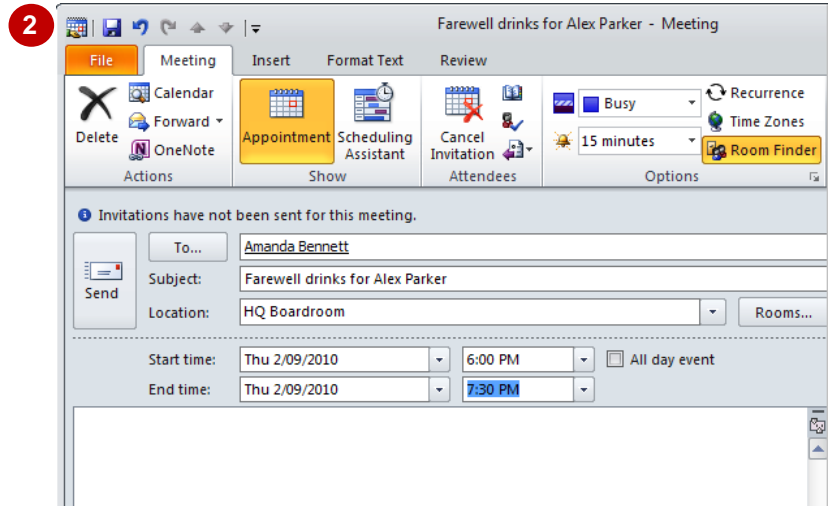
For Your Reference…

To *prevent meeting responses*:
1. Create a meeting request
2. Click on *Response Options* in the *Attendees* group
3. Remove the tick from *Request Responses*
4. Click on *Send*

Handy to Know…

- You can prevent responses after you have sent the initial meeting request. To do this, double-click on the meeting to open it, click on *Response Options* in the *Attendees* group, select **Request Responses**, and click on *Send Update*.

CANCELLING A MEETING

Meetings don't always proceed as planned and sometimes they need to be cancelled. Meetings in Outlook can be cancelled at any time. When a meeting is cancelled Outlook will send cancellation messages to prospective attendees, remove the meeting from your calendar and update the meeting in the attendees' calendars marking them as 'Cancelled: Meeting Name'.

Try This Yourself:

Same File

Continue using the previous data file with this exercise…

1 Click on the **Think Tank Lunch** meeting (first Wednesday next month) to select it

2 Click on **Cancel Meeting** 🔲 in the **Actions** group to open the **Meeting** window
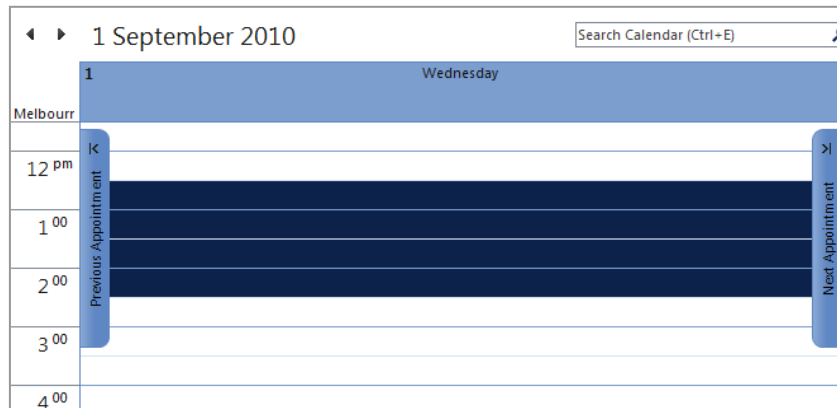
A cancellation note will appear at the top of the header…

3 Click on **Send Cancellation** 📧

Outlook will send a message to the attendees notifying them of the cancellation. It will then remove the meeting from your calendar
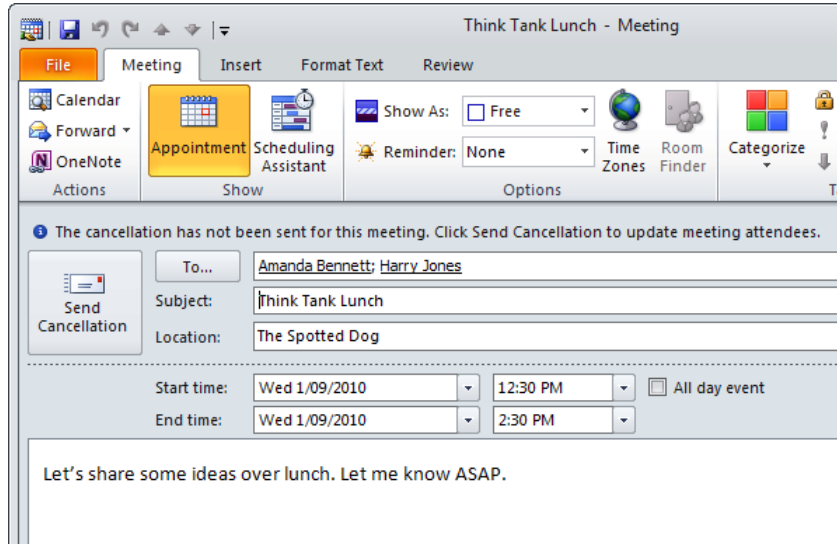
2

3

For Your Reference…

To **cancel** a **meeting**:

1. Click on the meeting in the calendar
2. Click on **Cancel Meeting** 🔲 in the **Actions** group
3. Click on **Send Cancellation** 📧

Handy to Know…

- When you cancel a meeting, invitees will receive a **Cancelled: Meeting Name** message in their **Inbox**. To delete the meeting from their calendar, they can click on **Remove from Calendar** in either the **Reading** pane or the **Respond** group in the open **Meeting** window.

THE SCHEDULING ASSISTANT

Rather than send a meeting request in the hope that attendees will be able to attend, you can plan a meeting using the *Scheduling Assistant*. This entails checking the schedules of the attendees to see their unallocated times so you can see when the best time will be to hold the meeting. Once you have determined the most appropriate time, you can send the meeting requests in the normal way.
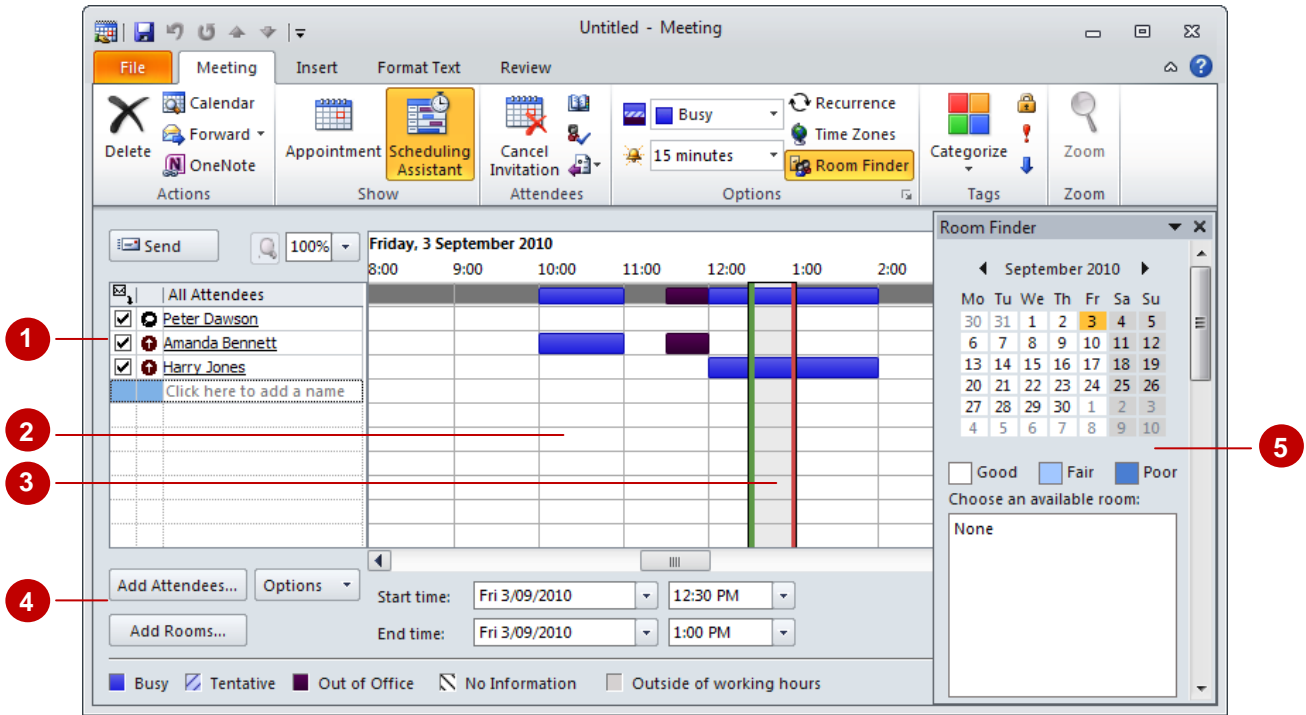
1	**Attendees list**	Displays the names of the people or resources that you want to invite to the meeting.
		The tick ✔ in the first column indicates that the person or resource will be sent a meeting request. Removing the tick will still allow you to see their availability but they will not be sent a meeting request.
		The icons in the second column indicate the attendee's status – Meeting Organiser ●, Required Attendee ♦, Optional Attendee ♦, Resource ♦. If desired, you can change the status of the attendees in the attendees list by right-clicking on the status icon and selecting the desired icon.
2	**Free/Busy grid**	Shows the availability of attendees plus yourself as the organiser. Appointments and meetings are shown as coloured blocks in the grid – *blue* when the attendees are unavailable, *hashed* when they are tentatively busy and *purple* when they are out of the office.
3	**Suggested Times bar**	Shows the time that you have allocated in your meeting request (these times also appear towards the bottom of the screen in *Start time* and *End time*). The green vertical line represents the start of the meeting and the red vertical line represents the end of the meeting. If you want to change the meeting duration, you can drag the *green* line to alter the start time and the *red* line to alter the end time.
4	**[Add Attendees]**	Use **[Add Attendees]** to add people to the attendees list.
	[Options]	Use **[Options]** to control how the calendar details are displayed.
	[Add Rooms]	Use **[Add Rooms]** to add resources to the attendees list.
5	**Room Finder pane**	Shows the rooms that are available at the suggested meeting time under *Choose an available room*. It also shows a list of other times when the majority of the required attendees are available under *Suggested times*. You can click on a time in this list to change the meeting to that time. (The *Suggested times* list is at the bottom of the *Room Finder pane* which you can't see in the above example.)

USING THE SCHEDULING ASSISTANT

Using the *Scheduling Assistant*, you can add attendees to a meeting request and then Outlook will display a summary of when attendees are busy, tentatively busy or out of the office.

Visually, this makes it very easy to schedule a meeting when attendees are free. And to make it even easier, Outlook displays a list of suggested meeting times in the *Room Finder* pane.

Try This Yourself:

Same File

Continue using the previous data file with this exercise…

1. Create a new meeting request at *12:30* on the first *Friday* next month

2. Click on *Scheduling Assistant* 📇 in the *Show* group to display the *Scheduling Assistant*

   Let's add some people...

3. Click on **[Add Attendees]** to open the *Select Attendees and Resources* dialog box, double-click on two people and click on **[OK]**

   Harry isn't free at 12:30 in our example. Let's change the meeting time…

4. Ensure *Room Finder* 📇 is selected in the *Options* group, then click on a time range under *Suggested times* in the *Room Finder* pane

5. Click on *Appointment* 🗔 to return to the meeting request, type a *Subject* and *Location*, then click on *Send* 📧 to send the meeting invitation and record the meeting in the calendar

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4
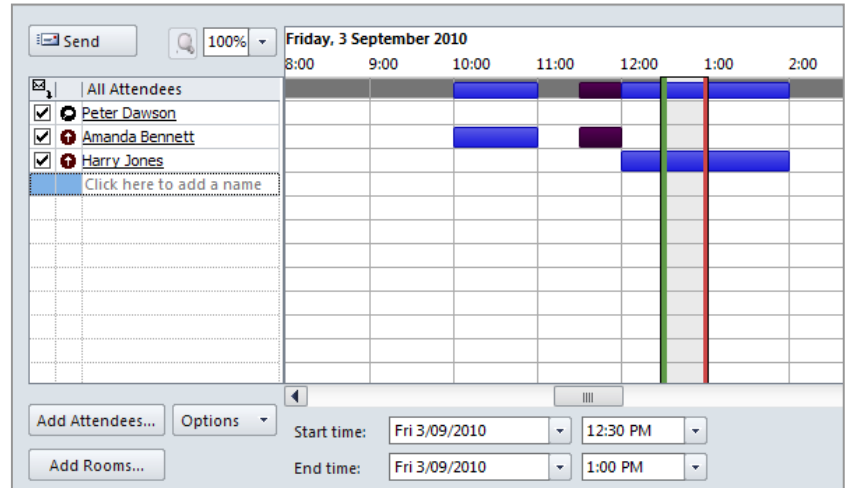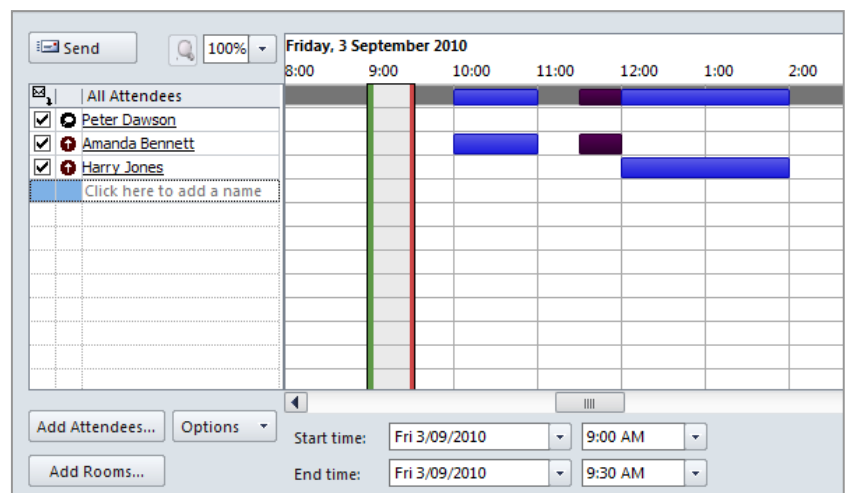
For Your Reference…

To *use* the *Scheduling Assistant*:

1. Create a meeting request, then click on *Scheduling Assistant* 📇 in the *Show* group

2. Click on **[Add Attendees]**, determine the best time for the meeting and click on *Send*

Handy to Know…

- You can move the meeting to a different timeslot by clicking on a blank area of the free/busy grid in the *Scheduling Assistant*.

- You can change the start and end times for the meeting in the *Scheduling Assistant* by dragging the green (start) and red (end) lines as desired.

SCHEDULING MEETINGS USING CALENDAR GROUPS

Outlook's *calendar groups* make it easy for you to see at a glance the combined schedules of a number of people or resources. For example, you may often schedule meetings with the same people in a particular project or within your team. By creating a *calendar group* for each of these sets of people, you can quickly check their availability and then schedule a meeting.

Try This Yourself:

Continue using the previous data file with this exercise…

1 Click on *Calendar Groups* 📅 in the *Manage Calendars* group, then select *Create New Calendar Group* to open the *Create New Group Schedule* dialog box

2 Type **BSS Project** and then click on **[OK]** to open the *Select Name* dialog box

3 Double-click on two names, and then click on **[OK]** to create the calendar group and display it in the *Navigation* pane

The calendars will open in side-by-side view. If your calendar group had five members or more, the calendars would display in the horizontal Schedule view…

4 Click on *Schedule View* 📅, then double-click in a white area between the timeline and the top of the calendar to open a *Meeting* window

5 Type a *Subject* and *Location*, then click on *Send* 📧 to schedule the meeting

1

Create New Calendar Group

Type a name for the new calendar group

[   ]

[OK] [Cancel]
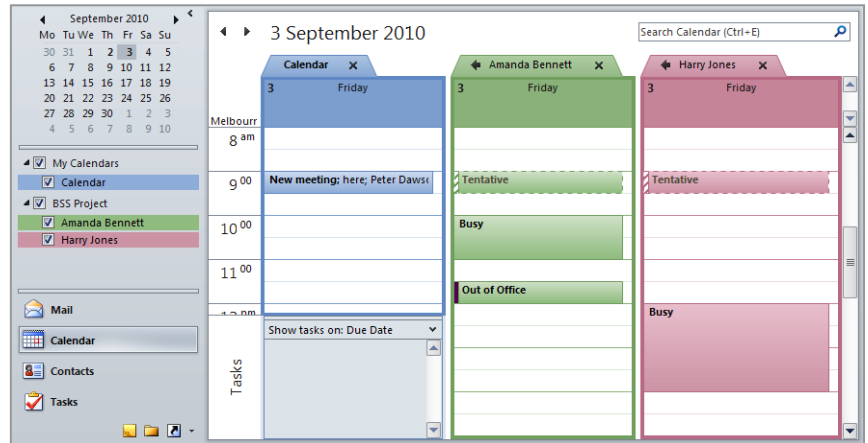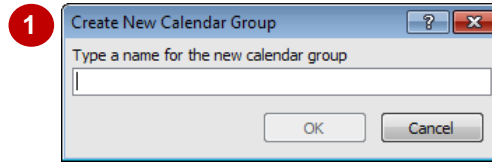
3

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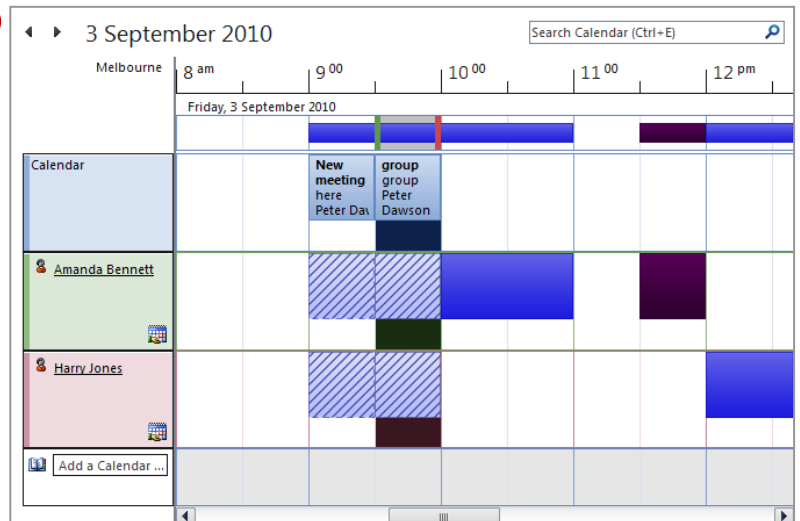
For Your Reference…

To *create* a *calendar group*:

1. Click on *Calendar Groups* 📅
2. Select *Create New Calendar Group*
3. Type a *Name* and click on **[OK]**
4. Select the people and click on **[OK]**

Handy to Know…

- You can create a new calendar group by displaying the desired calendars, clicking on *Calendar Groups* 📅 and selecting **Save As New Calendar Group**.

- You can add a shared calendar to a calendar group by dragging it onto the calendar group's name in the *Navigation* pane.