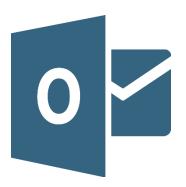




# Outlook 2016 Calendars



# Microsoft Outlook 2016 Calendars 1.5 hour

In this workshop we will investigate the Microsoft Outlook 2016 calendar views; customizing the calendar appearance; creating and modifying appointments, meetings and all day events; setting reminders, privacy, and recurrence properties.

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# **Introduction to Outlook Calendar**

The calendar is the second option in the Navigation Pane on the lower left side of your Outlook Window. If the menu is collapsed, it will be the second button down. You can also open the calendar by pressing Ctrl-2 on the keyboard.

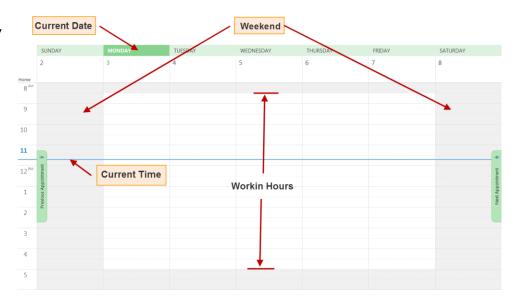


The Outlook calendars will always highlight the current date with an orange border. When viewing a calendar that displays the time you will see a thin orange line marking the current time.

By default, Saturday and Sunday are not part of the "work week" and therefore in some calendar views these days are shaded a different color. By default, 8:00 AM is the daily start time and 5:00 PM is the daily end time. Anytime outside this range is also color-coded. These values can be adjusted in the Calendar Options. (File Menu -> Options -> Calendar Options).



Week View



Day View



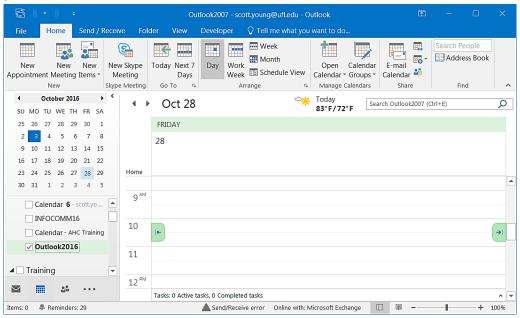
Month View

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Sep 25	26	27	28	29	30	Oct 1
2	3	4	5	6	7	8
Previous Appointment +	10	11	12	13	14	15 empiriodel 22
Previous	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	Nov 1	2	3	4	5

# **Calendar Views**

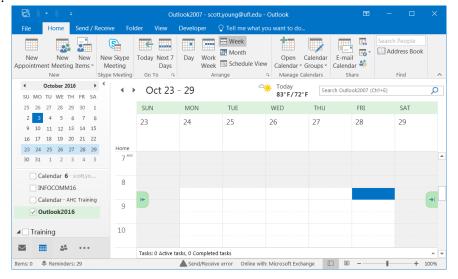
# Day View

The date navigator (little calendar) on the left, indicates, "Today" by surrounding it with dark blue box (i.e. October 3, 2016.) The day you are currently viewing is shaded in with light blue, in this case October 28, 2016. To change to a new day you can click any date in the date navigator, or use the navigation buttons ◀ ▶ along the top of the calendar. If the navigation pane has room, it may display more than one monthly calendar. You can browse through the months by using the navigation buttons provided by the month name on the date navigator, or by clicking on the month showing and choosing a new value.



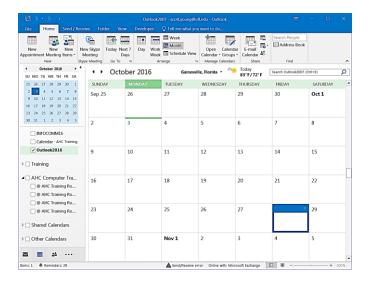
# Week View

Like the day view, the week view has a little calendar and date navigator in the navigation pane. There is a border around Today, and the dates shown are highlighted. You can move to a different week by clicking on another day in the date navigator or use the navigation buttons. You can tell the calendar to show only the "Work Week" (in this case Monday through Friday) or the full week (Sunday through Saturday). Hiding the non-work days (like the weekends) allows more room to see the details of your appointments.



#### Month View

Like the day view, the month view has a date navigator in the navigation pane. There is a border around "Today", and the dates shown are highlighted. You can move to a different month by clicking on the navigation buttons. If you click on a day in the date navigator, Outlook will take you to the Day view for the chosen date. There are three view options for the Month calendar: Low, Medium and High. Low shows only the full day events. Medium shows events and the color category for the appointments, with a thin line representing Noon. High displays the events and appointments, including start times, subjects and locations.

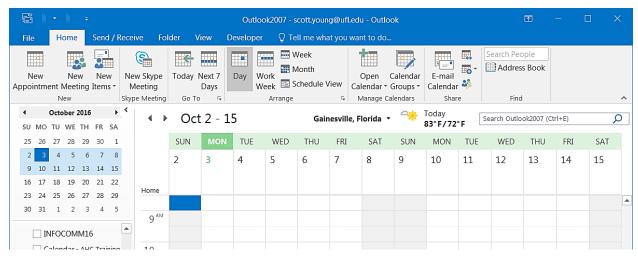


# **Custom Choices**

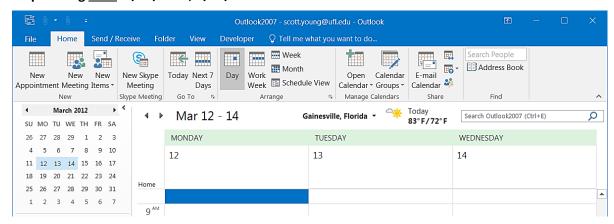
# Multiple Days

Throughout Windows you can use the Shift key and Control key on the keyboard to help you make a selection. Using the date navigator in the navigation pane you can **Click** on one date and then **Shift-Click** on another for a range of days. Clicking on one date and then Ctrl-Clicking on another will give you only the dates you choose.

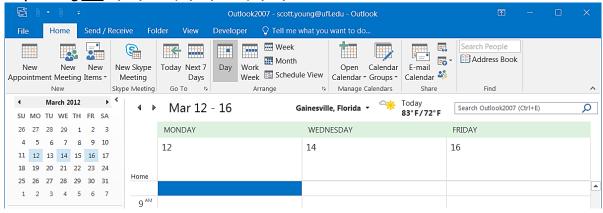
The most Outlook will let you view from the Day View is 14 days, but you can use your Shift and Ctrl keys to help you select which 14 days you'd like to display from the date navigator.



# Example using Shift: 3/12/2012, 3/14/2012

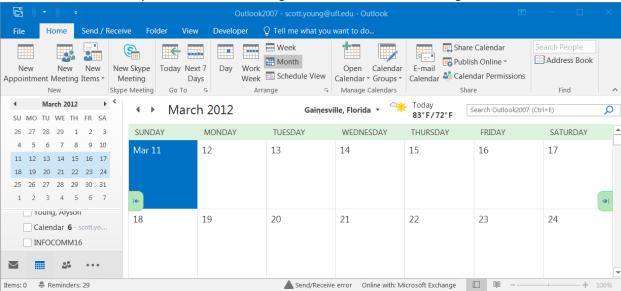


# Example using Ctrl: 3/12/2012, 3/14/2012, 3/16/2012



# Multiple Weeks

There isn't really a multiple week view, it's officially a month view that shows less than a full month; using the date navigator in the navigation pane, select Sunday through Sunday (click and drag.) You can use the scroll wheel on your mouse or the navigation buttons to move through the weeks.



# **Multiple Calendars**

We can view multiple calendars in any view. This includes custom calendars you have created, other people's calendars, and resource calendars.

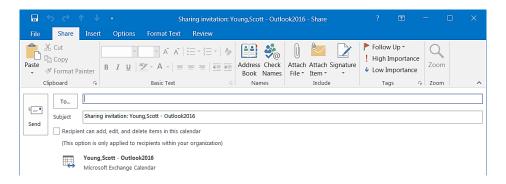
Open a Shared Calendar

Cancel

Name...

From the Home menu choose **Open Calendar**, and then choose **Open Shared Calendar**. Click the **Name...** button to find the user or type their name last, first in the box and click **OK**.

We can share our calendar with others. From the Home menu choose **Share Calendar**, click on the **To:** button to find the person or type their name last, first in the box and click the **Send** button.



# **Multiple Calendar Views**



By default the calendars appear in a Side by Side veiw. The arrow in front of the calendar name that points to the left will put the calendars into Overlay view. The arrows pointing right, will return them to a Side-by-Side view.



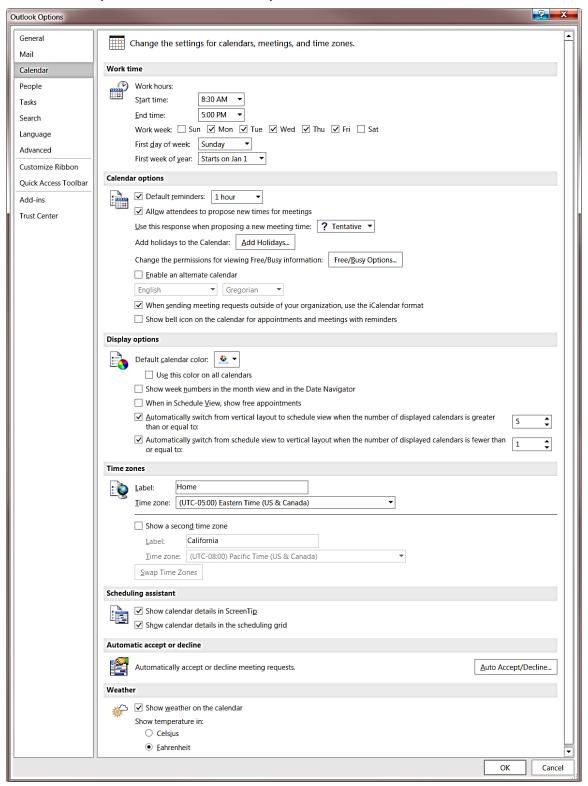
Outlook tries to keep each calendar and its appointments color coded. The top layer calendar will have solid color appointments and bolded text. Click on a calendar name to bring it to the top layer. Uncheck the calendar from the navigation pane to remove it from the view.



# Customize the Calendar

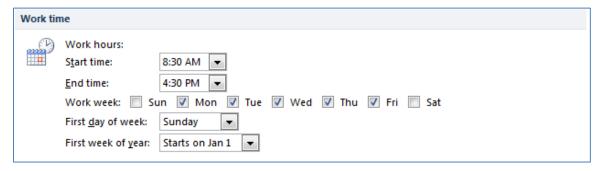
# **Calendar Options**

To open the calendar options, right-click inside the calendar and choose **Calendar Options** or from the **File** menu choose **Options**. From the **Outlook Options** tab, click **Calendar**.



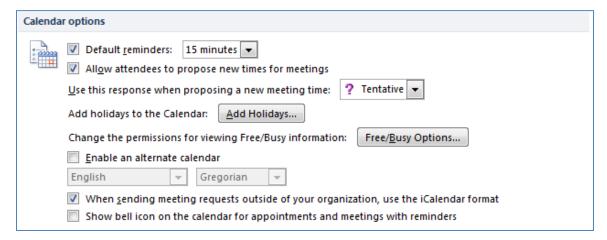
# Work Time (calendar shading)

Outlook shades the non-work hours based on the Calendar work time options. If you do not work on Fridays, you can uncheck the FRI box, if your hours are 9:00 AM to 5:00 PM set the times here. Outlook will adjust its shading based on the values you set here.



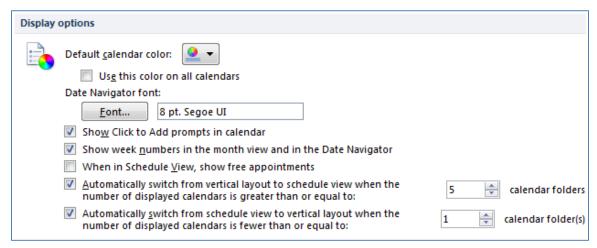
# Calendar Options (reminders, holidays)

The Calendar options section help you set the defaults for new appointments. How long should the reminder be? Can other attendees propose new times? Show a bell icon on the meetings with reminders?



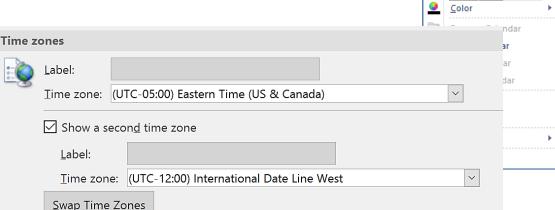
# Display Options (week numbers, background colors, fonts)

The display options allow you to set the defaults for your calendar. From here you can change the background color, the fonts, and when to switch to a vertical layout.



# **Time Zones**

Click **Show a second time zone** to create a dual calendar. Label and choose the new time zone value. The second time zone adds a new time column to the calendar views and will not change the way calendar items are stored or displayed

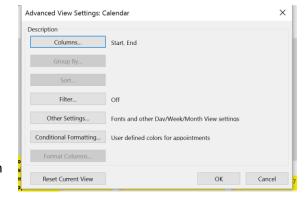


# **Other Settings**

Right-click anywhere inside the calendar click on **View Settings**, this will open the "Advanced View Settings: Day/Week/Month" window. From here choose **Other Settings...** 

# Change the time scale

By default, the calendar grid shows a time interval of 30 minutes. You can change the **Time Scale** to the interval you want for your calendar. Right-click in the time column of the calendar and choose a new time scale.



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# Change the font

By default Outlook is set to 8pt. Segoe UI. Choose the font option you want to change and set it to your preference.

To change the fonts of the date navigator (the little calendar), go to the **File** menu, choose **Options**, go to the **Calendar** tab, and look under Display options.

# **Multiple Windows**

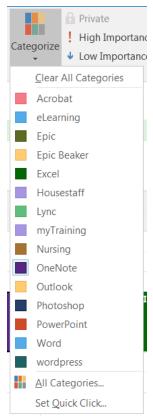
If you would like to see your calendar in a different window you can right-click on the Calendar in the Navigation Pane and choose "New Window". By making a new window, you can have one showing your Mail and one showing your Calendar, or show two different calendar views at once.

# **Custom Calendars**

You can create custom calendars by right-clicking on *your* Calendar under the **My Calendars** group in the Navigation Pane and choose "New Calendar".

# **Appointment Colors (Categories)**

We use the Categorize tool to change the appointment's color.

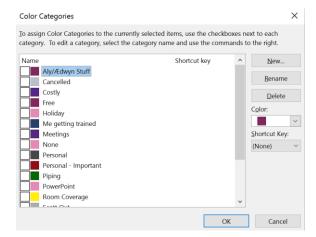


By default, Outlook has a standard set of color choices:

You can categorize an appointment from the **Categorize** option in the **Appointment** window, or right-click on an appointment and choose the categories. You can customize your own color choices by choosing the **All Categories...** option at the bottom of the menu. From the color categories window, you can rename the current color categories and create new ones.

When you share an appointment with another calendar, Outlook tries to match the "name" of the category. Both calendars need to have the exact same name

for their color categories or they won't match. It won't hurt the appointment to not match; the colors are purely for visibility.



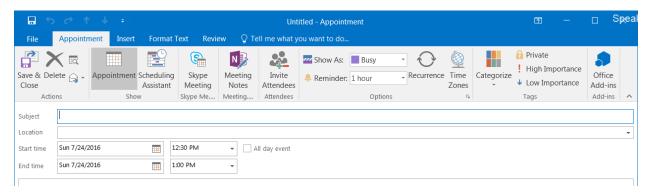


# **Creating Appointments**

You can create a new appointment

- From the menu: Home -> New Appointment
- Using the keyboard shortcut: Ctrl-N
- By dragging an outlook item to the calendar in the navigation pane
- By double-clicking in the calendar
- By selecting a time frame and typing directly on the calendar

# **Appointment Window**



To turn the ruler on and off, use the ruler button found at the top of the vertical scroll bar.



There are three basic tabs in the **Appointment** window. Your view may differ slightly depending on the size of your screen. When the window is narrow Outlook combines or shrinks the buttons, when it's wider it shows the buttons larger. However large the window, you should find all the options discussed here. Some options are only available in the body of the appointment.



# **Appointment Tab**

# **Action Group**

- Save and Close Saves the appointment and closes the window.
- Delete Deletes the appointment from the calendar and places it in the Deleted Items folder.
- Calendar Opens a day view calendar in a new window on the start date of the appointment.
- Forward Opens a new message (email) with the appointment attached.

# **Show Group**

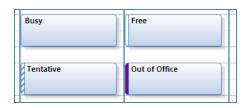
- Appointment Change to Appointment view.
- Scheduling Assistant Change to Scheduling Assistant view (see scheduling meetings).

# **Attendees Group**

• Invite Attendees – Changes the appointment to a Meeting and adds a **To:...** line to the header.

# **Options Group**

 Show As – Choose from Free, Working Elsewhere, Tentative, Busy, and Out of Office. These choices will show visually on the left side of the appointments and the choices will help plan meetings in the Scheduling Assistant.



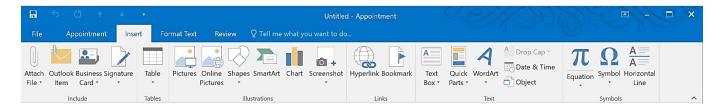
- Reminder Sets how early you wish to be reminded of this meeting. You can choose None or increment of minutes, hours, days or weeks.
- Recurrence Set the appointment recur over a pattern of dates (see recurring appointments)
- Time Zones Adds Time zone options next to the times. This helps with travel plans where you start in one time zone and end in another.

# Tags Group

- Categorize Apply custom categories which will color code your calendar items (see Appointment Colors (Categories)).
- Private Blocks the subject and content of the appointment from shared calendar viewers.
- High Importance Marks the appointment has High Importance. This will make a visual difference if the appointment is shown in a list like the **Mail** view.
- Low Importance Marks the appointment has Low Importance. This will make a visual difference if the appointment is shown in a list like the **Mail** view.

# **Insert Tab**

The Insert tab of an Appointment and an Email are the same.



# Include Group

- Attach File Attach a file, such as a Word document or PDF file, to the appointment.
- Attach Item Attach an Outlook item, such as an email, to the appointment.
- Business Card Include a business card from your contacts. Recently used business cards will
  appear on the list. Business cards are created in the Contact section of the navigation pane.
- Signature Include a preset signature in the body of the appointment. Signatures are created through the Tools menu -> Options -> Mail Format -> Signatures.

#### Tables Group

• Tables – The tables menu allows you to insert a table into the body of the appointment. Once you have created a table Outlook will show the Table Tools tabs. These appear only when you are in the table. For more information about tables see the Word 2016: Tables handout.

# Illustrations Group

(As with tables, most of these options will have custom tabs when they are selected)

- Picture Add a graphic file to the appointment.
- Online Pictures Find and insert pictures from a variety of online sources.
- Shapes Draw a ready-made shape inside the appointment.
- Smart Art Insert a Smart Art graphic, these help to visually show data flow.
- Chart Insert a Microsoft Excel Chart. Outlook will open a sample set of data you can change to create your custom chart.
- Screenshot Insert a picture of any program that is not minimized to the taskbar.

# Links Group

- Hyperlink Insert a hyperlink into the appointment. Outlook will automatically change any values with a standard web format to a hyperlink, but this option will give you a chance to display a "name" and still like to the full address.
- Bookmark Insert a bookmark into the appointment. A bookmark is used to name a specific location in a document, in this case in the appointment. You can create a hyperlink to jump to bookmarks. This is useful if there is a lot of text in the body of the appointment.

# **Text Group**

- Text box Inserts a floating box of text separate from the body of the appointment.
- Quick parts Create and insert items from the AutoText.
- Word Art Inserts a graphical text object.
- Drop Cap Makes the first character in the paragraph large.
- Date/Time Inserts the current date and time. Outlook will let you choose the format of the
  date/time value. If you would like the displayed text date to change each time the appointment
  is opened you can check the Update Automatically option in the corner of the Date/Time
  window.
- Object Inserts an embedded object. This can be a new or existing file.

# Symbol Group

- Equation Inserts an equation and show the Equation Tools. Here you can use common mathematical symbols to custom build an equation.
- Symbol Insert a symbol that is not on your keyboard. Such as: ॐ ♡ ¿
- Horizontal Line Inserts a line into the appointment. Click on the line and press delete to make it go away.

# **Format Text Tab**

The Format tab of an Appointment and an Email are the same. These are the same tools we use in Microsoft Word. For details of these options, please see the **Word 2016: What Every Word User Should Know!** handout.



Clipboard Group – Cut, Copy, Paste, and Format Painter; paste has a menu showing special options.

Font Group – Modify current font options.

Paragraph Group – Modify current paragraph settings.

Styles Group – Set and use the same 'font' and 'paragraph' styles throughout the appointment.

Zoom Group – Open the **Zoom** window to specify the zoom properties.

Editing Group – Search and select options.

# **Review Tab**

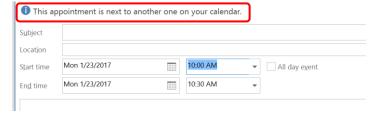
**Proofing Group** 

 Spelling – The Spelling menu offers the same proofing options as Microsoft Word. Outlook used the same keyboard shortcuts as well. F7 to check spelling and Shift-F7 to open the Research and Thesaurus pane.



#### **Header Values**

Outlook will give you a warning message if you already have an appointment during the time you are attempting to schedule.



• Subject – Displays bold within the appointment.



- Location Displays in a lighter font. In some views, you will not see this option at all.
- Start Time Set the beginning date and time. Outlook is forgiving, if you leave off the year it will assume this year. If you leave off the AM/PM, it will assume you mean AM. Outlook does understand the 24-hour clock, i.e. 15:00 = 3:00 PM.
- End Time Set the ending date and time.

• All day event – This option will gray out the times and change the Appointment into an Event.

# Creating an Appointment from an Email

From an open email, you can choose "Move to Folder" and choose a calendar, or you can simply drag an email from the **Mail** view onto the **Calendar** in the **Navigation Pane**.

Outlook will open a new appointment window with the email in the body of the message. By default, the appointment will be set for the current date and time.

# All day events

In the appointment window next to the **Start time** there is a check box to mark the appointment as an **All-day event**.

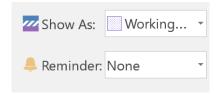




Events appear at the top of the **Day** and **Week** view calendars and display in every detail view of the monthly calendar. The **Show time as** options will color code the full day.

# Reminders (alarms)

The default reminder is 15 minutes. This can be changed in the Calendar Options (**File** menu, **Options**, **Calendar**). When you create or modify an appointment, you can set the reminder from the Options group on the Appointment tab. Outlook has to be open to receive the reminders.



# **Recurring Appointments**

When you create an appointment, it is created for one instance in time. You can copy or duplicate an appointment, but sometimes it is nice to let Outlook create the multiple instances for you.

To set the recurrence options, click on the **Recurrence** button in the **Appointment**.



All the appointments will have the same start and end time.



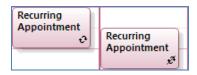
#### The Recurrence pattern varies depending on the setting: Daily Recurrence pattern Daily Every 1 day(s) Weekly Every weekday Monthly Yearly Weekly Recurrence pattern O Daily Recur every 1 week(s) on: Weekly Sunday Monday Tuesday ✓ Wednesday Monthly Thursday Friday Saturday Yearly Monthly Recurrence pattern O Daily O Day 25 of every 1 month(s) <u>W</u>eekly ▼ Wednesday of every 1 month(s) Monthly Yearly Yearly Recurrence pattern O Daily Recur every 1 year(s) @ Weekly • On: January 25 Monthly ▼ Wednesday On the: fourth • ▼ of January Yearly Range of recurrence ▼ ○ No end date Start: Tue 1/25/1876 End after: 99 occurrences O End by: Mon 4/1/1974 OK Cancel Remove Recurrence

The pattern of appointments will continue through the range set in this window.

The reoccurring appointments will show a little recurrence symbol in the lower left. If an appointment is moved outside of the original time, outlook will put a little slash through the symbol.

You cannot categorize (change the color of) individual appointments. If you set one, you set them all.

If you delete a recurring want to remove all the choose all the occurrences, past, present and future.



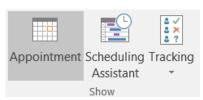
appointment, Outlook will ask if you occurrences, or just this one. If you Outlook will delete "all" of them:

# Scheduling Meetings

When you create an appointment, it goes on your calendar. If you would like it to appear on others, you need to "invite" them to the appointment. Click on the **Invite Attendees** button on the

**Appointment** tab. This will change the **Appointment** to a **Meeting**. Outlook changes the header to allow for more options, adding a **To...** 

line for the invitees and a **Rooms**... button to search for available locations.

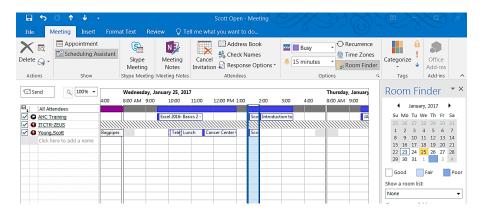


To return this appointment to only be on your calendar, press the "Cancel Invitation" button.

If you set a meeting to an All-day event, Outlook calls it an Invited event.

# **Scheduling Assistant**

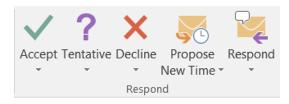
The Scheduling Assistant will show you the availability of the invitees and help plan your meetings.



# **Tracking Meetings**

Once a meeting has been sent, if you open the appointment you will see a new button in the show group on the Meeting tab. This new view will show a list of the invitees and their responses to your meeting request.

# Responding to Meeting Requests



Meeting requests will appear in your in box and on your calendar (shown as "tentative"). Whether you open the request in from the Mail or Calendar view, you will see a Response group.

When you choose one of the three responses, **Accept**, **Tentative**, or **Decline**, Outlook asks if you would like to send your response to the meeting creator.

#### **Modifying Appointments**

To modify the contents of an existing appointment, in a calendar view you can -

- Double-click on an appointment
- Click on an appointment and chose **Open** from the Appointment tab.

#### **Deleting Appointments**

To delete an existing appointment, in a calendar view you can -

- Click on the appointment to select it and press Delete on the keyboard.
- Open the appointment and press the Delete button in the Actions Group of the Appointment Tab.
- Right-click on the appointment and choose Delete.

No matter how you delete the appointment you can retrieve it from the **Deleted Items** folder in the **Mail** view. To 'un-delete' the appointment, open the **Deleted Items** folder and drag the appointment back to the Calendar in the Navigation Pane.

# **Moving Appointments**

To move an appointment, in a calendar view you can -

- Select an appointment and drag it to the new Date/Time, use the shift or ctrl to select multiple appointments. (Be careful with the control key, as sometimes Outlook thinks you are trying to copy the selection).
- Open the appointment and modify the Date/Time.

# **Duplicating Appointments**

To duplicate an appointment, in a calendar view you can -

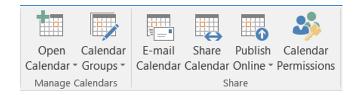
- Select an appointment and Ctrl-drag it to the new Date/Time.
- Select an appointment and use the Edit menu or keyboard short-cut (Ctrl-C) to copy, click on the new date/time and paste.

# Moving and Duplicating with Multiple Calendars

When two calendars are displayed, you can drag an appointment from one calendar to the other. Outlook will copy the appointment(s) to the second calendar. If you would like to "move" the appointments from one to another, press and hold the Shift key before you release the mouse.

# **Sharing Calendars**

In the bottom of the navigation pane in the calendar view, you will find several "share" options for your calendar.



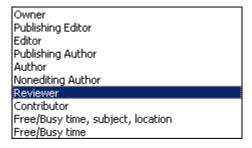
If you think, you have permission to view a calendar and the name does not appear in your navigation pane, in the Home tab click on the **Open Calendar** in the Manage Calendars.

If you do not have permission, Outlook will prompt you to contact them, and offer you a choice to share your calendar with that person.

To give permissions to another person, in the Share link click on the **Share Calendar** or right-click on your calendar and choose **Share, Share Calendar**. By default when you share your calendar the other person is considered a "reviewer", that is they can only see what is on your calendar. To allow them to do more you need to change your permission levels.

# **Permission Levels**

Right-click on a calendar in calendar groups in the navigation pane. Choose **Share, Calendar Permissions**.



#### In General:

- Owner Full permissions
- Editors Read, create and modify
- Author Read, and create
- Reviewer Read

The **Permission Level** choice is a starting place of the permission options. You can customize the permissions for each person on your list.

From this window, you can add and remove contacts who share your calendar.

