

Microsoft Outlook Calendars



Outlook Calendars
1.0 hour

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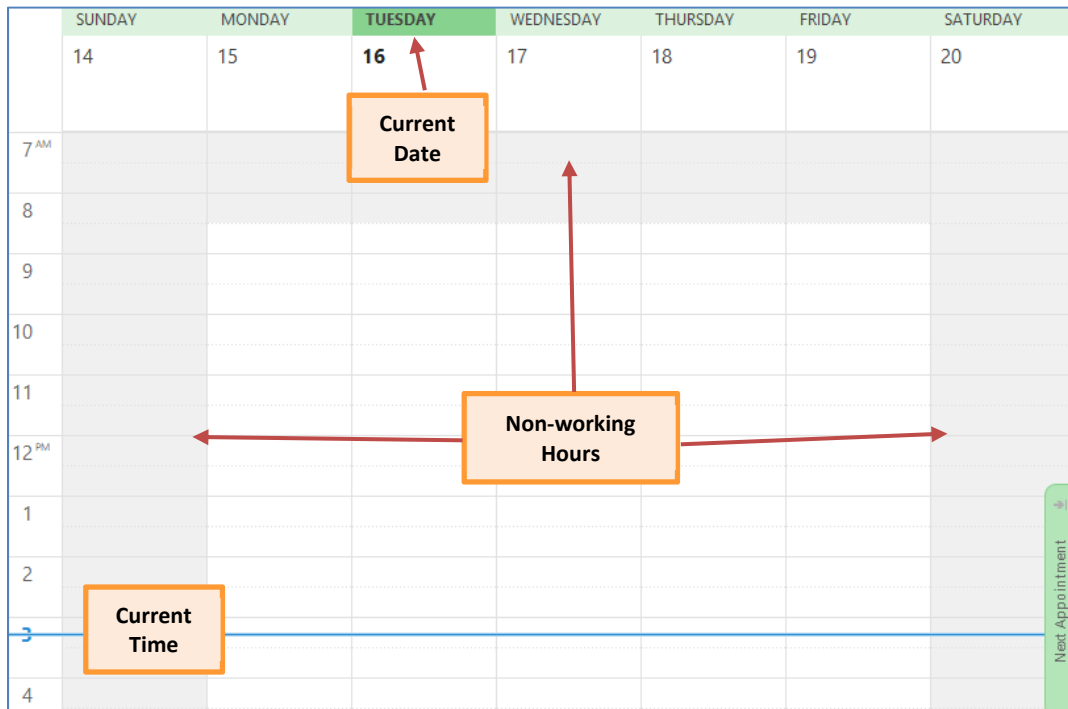
Introduction to Outlook Calendar

Images in this handout are from Outlook 2019, but should be similar to most versions of Microsoft Outlook.

The Calendar icon can be found at the bottom of the Navigation Pane on the left side of your Outlook Window. Click this icon or press Ctrl-2 on the keyboard to open the Calendar.

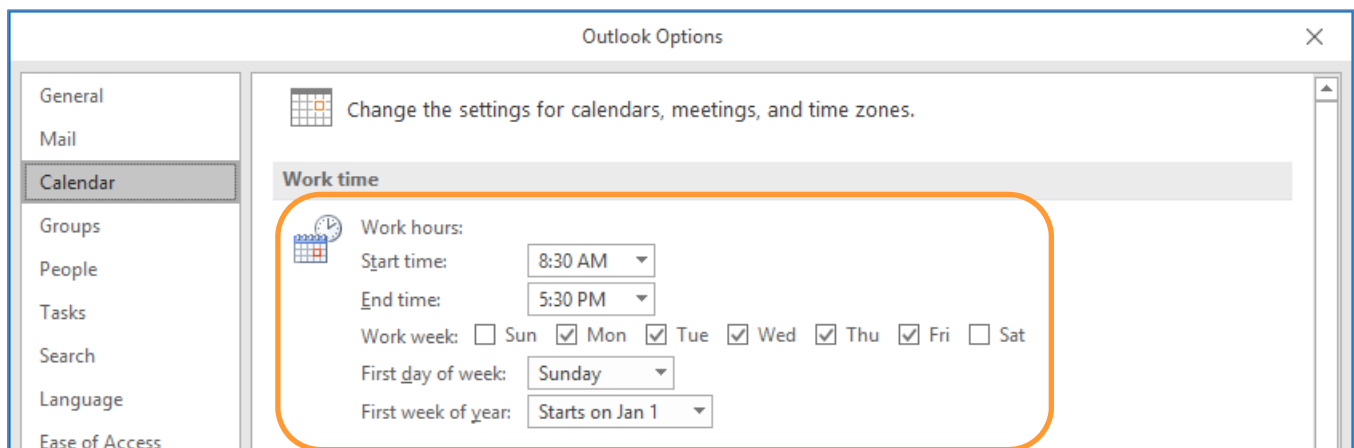


The calendars will always highlight the current date. When viewing a calendar that displays the time you will see a thin line marking the current time.



Non-working hours are shaded a different color. By default, the workweek is Monday through Friday and the work hours are 8:00 AM through 5:00pm.

These values can be adjusted in the Calendar Options. (File -> Options -> Calendar Options)



Calendar Views

The Date Navigator (little calendar) on the left highlights "Today", in this case, February 16, 2021. The day you are currently viewing is shaded a lighter color in the same date navigator, in this case February 1, 2021.

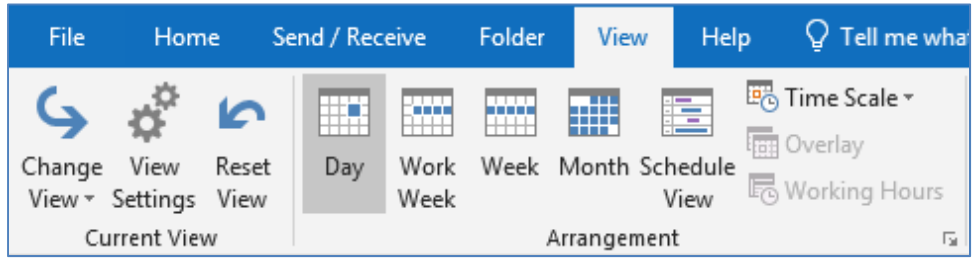
To change to a new day, you can click any date in the date navigator, or use the navigation buttons ◀ ▶ along the top of the calendar. If the navigation pane has room, it may display more than one monthly calendar. You can browse through the months by using the navigation buttons provided by the month name on the date navigator, or by clicking on the month showing and choosing a new value.

The screenshot displays the Microsoft Outlook calendar interface. At the top, the ribbon includes tabs for File, Home, Send / Receive, Folder, View, and Help, along with a search bar for "Tell me what you want to do". The Home tab is active, showing various calendar-related actions such as "New Appointment", "New Meeting", "New Items", "New Skype Meeting", "Go To", "Arrange", "Manage Calendars", "Share", "Groups", and "Find".

On the left side, there are two date navigators. The top one shows "February 2021" with the 16th highlighted in blue. Below it is "March 2021". Underneath these is a "My Calendars" section with checkboxes for "My Calendars", "Shared Calendars", "Rooms", and "Other Calendars".

The main calendar area shows a weekly view for "February 1, 2021". The day is labeled "MONDAY". A blue appointment bar is visible, spanning from 11 AM to 12 PM. The appointment bar has "Previous Appointment" and "Next Appointment" labels on its ends. A search bar for "Zoom Planner" is located at the top right of the calendar area.

Change calendar arrangements on the View tab.



Work Week View

| | MON | TUE | WED | THU | FRI |
|-------|----------------------|-----|-----|-----|--------------------|
| | 1 | 2 | 3 | 4 | 5 |
| 9 AM | | | | | |
| 10 | | | | | |
| 11 | ← | | | | |
| 12 PM | | | | | |
| 1 | Previous Appointment | | | | Next Appointment → |
| 2 | | | | | |
| 3 | | | | | |
| 4 | | | | | |
| 5 | | | | | |

Week View

| | SUN | MON | TUE | WED | THU | FRI | SAT |
|-------|----------------------|-----|-----|-----|-----|-----|--------------------|
| | 31 | 1 | 2 | 3 | 4 | 5 | 6 |
| 9 AM | | | | | | | |
| 10 | | | | | | | |
| 11 | | ← | | | | | |
| 12 PM | | | | | | | |
| 1 | Previous Appointment | | | | | | Next Appointment → |
| 2 | | | | | | | |
| 3 | | | | | | | |
| 4 | | | | | | | |
| 5 | | | | | | | |

Month View

| SUN | MON | TUE | WED | THU | FRI | SAT |
|--------|--------------|-----------|-----|-----|-----|-----|
| Jan 31 | Feb 1 | 2 | 3 | 4 | 5 | 6 |
| 7 | 8 | 9 | 10 | 11 | 12 | 13 |
| | 15 | 16 | 17 | 18 | 19 | 20 |
| | 22 | 23 | 24 | 25 | 26 | 27 |
| 28 | Mar 1 | 2 | 3 | 4 | 5 | 6 |

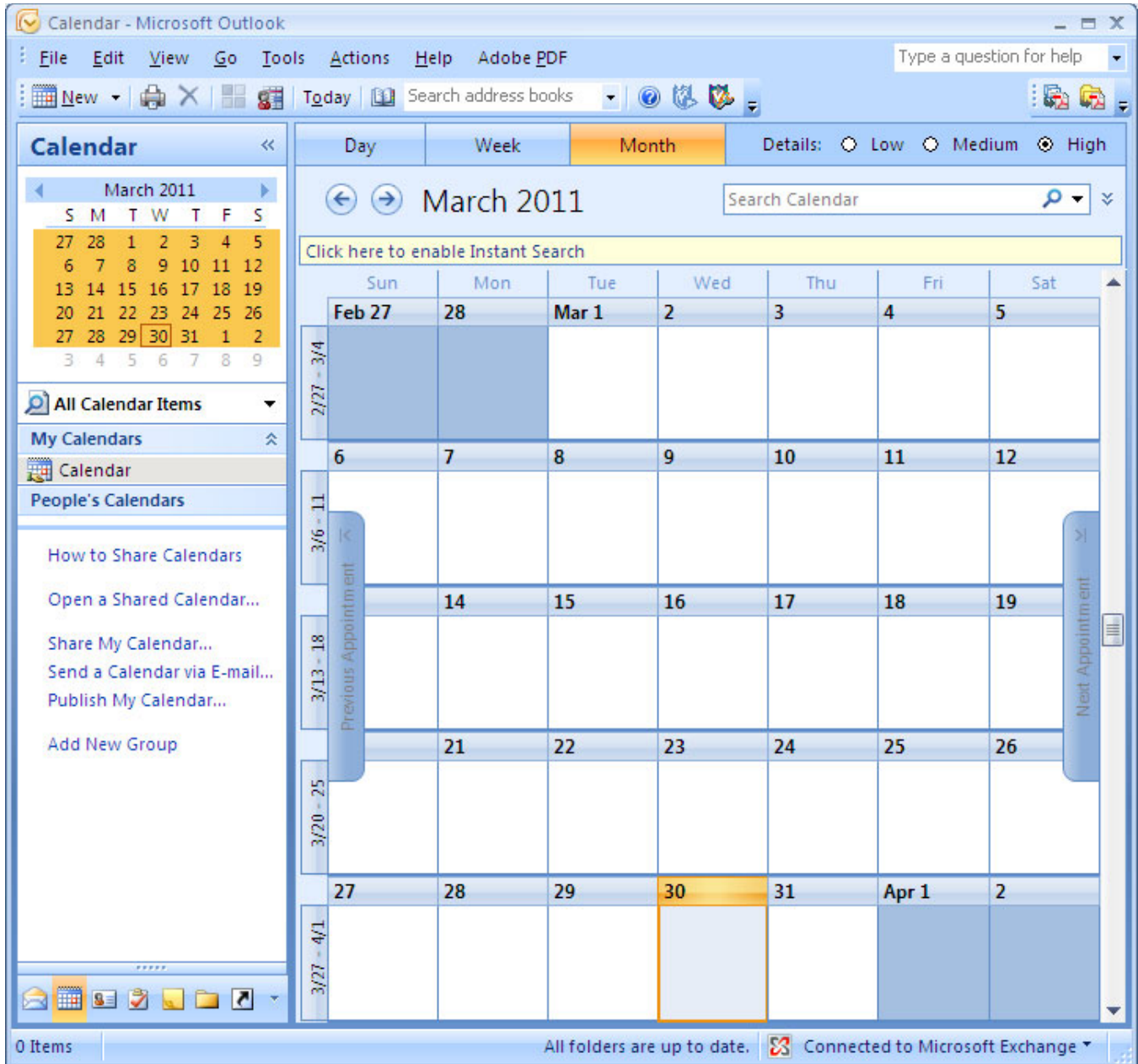
Schedule View

| | 9 am | 10 | 11 |
|--------------------------|------|----|----|
| Monday, February 1, 2021 | | | |
| Zoom Sessions | | | |
| | | | |
| | | | |

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.

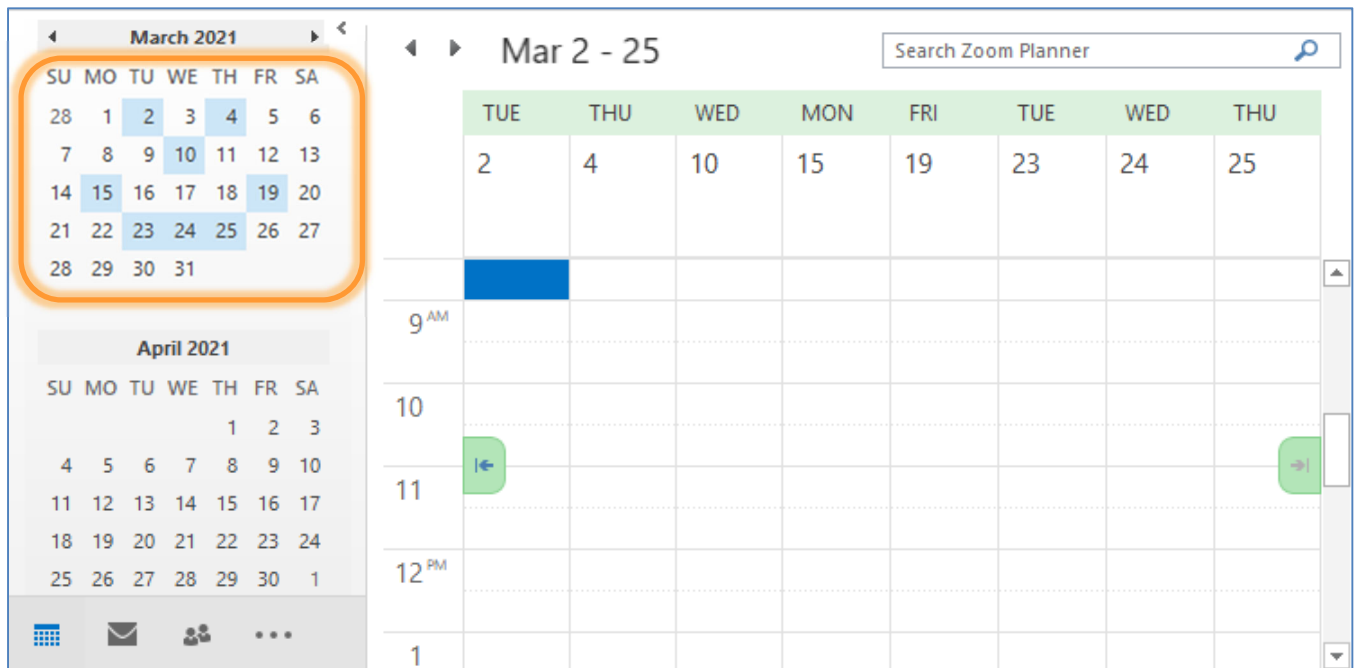
Example using Shift: 3/21/2021, 3/23/2021

The screenshot shows the Zoom Planner interface. On the left, a calendar for March 2021 is displayed with dates 21, 22, and 23 highlighted in blue and enclosed in an orange box. The main view shows a grid for 'Mar 21 - 23'. The columns are labeled 'SUNDAY', 'MONDAY', and 'TUESDAY'. The rows are labeled with times: 9^{AM}, 10, 11, 12^{PM}, and 1. A blue bar is visible at the top of the 9^{AM} row for Sunday. Green navigation arrows are present on the 11 row for Sunday and Tuesday. A search bar labeled 'Search Zoom Planner' is at the top right.

Example using Ctrl: 3/21/2021, 3/23/2021, 3/25/2021

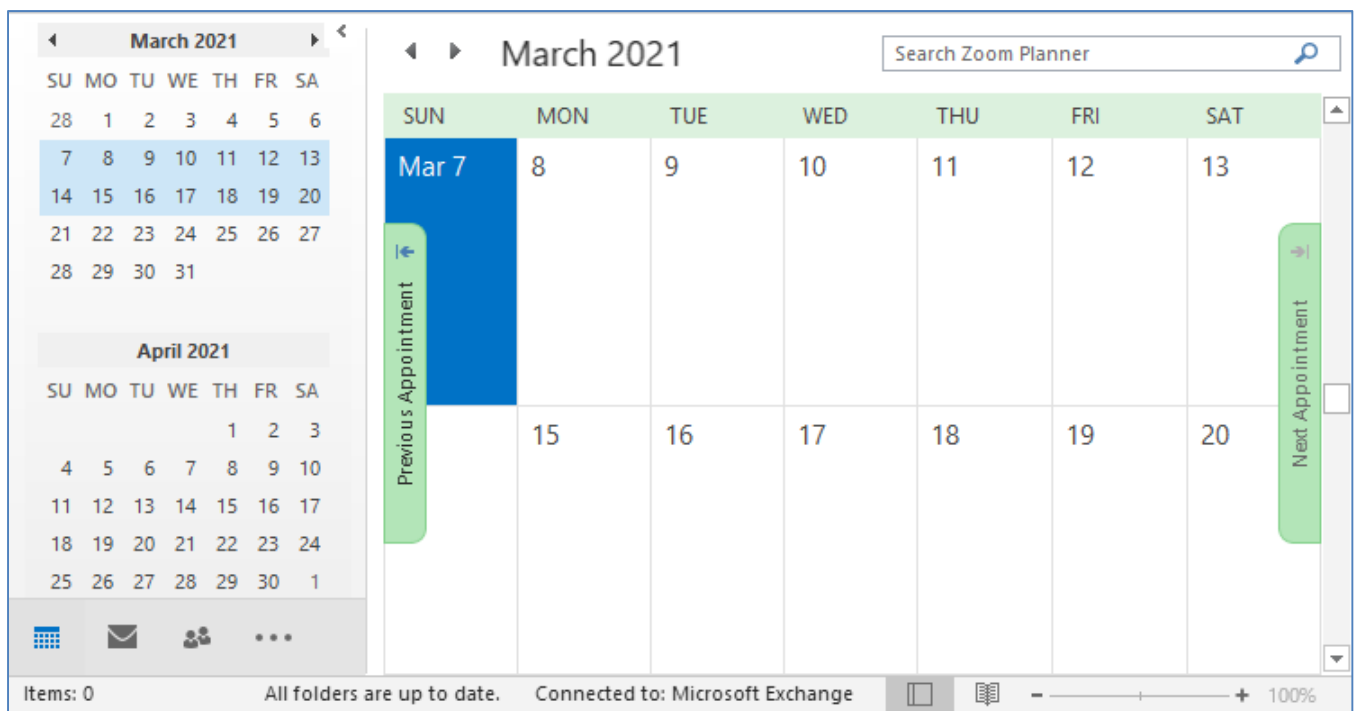
The screenshot shows the Zoom Planner interface. On the left, a calendar for March 2021 is displayed with dates 21, 22, 23, 24, and 25 highlighted in blue and enclosed in an orange box. The main view shows a grid for 'Mar 21 - 25'. The columns are labeled 'SUNDAY', 'TUESDAY', and 'THURSDAY'. The rows are labeled with times: 9^{AM}, 10, 11, 12^{PM}, and 1. A blue bar is visible at the top of the 9^{AM} row for Sunday. Green navigation arrows are present on the 11 row for Sunday and Thursday. A search bar labeled 'Search Zoom Planner' is at the top right.

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.



Multiple Weeks

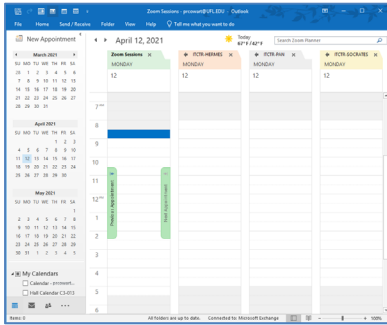
There is not really a "multiple week" view, it's officially a "month" view that shows less up to six weeks; using the date navigator in the navigation pane, select Sunday through Sunday (click and drag).



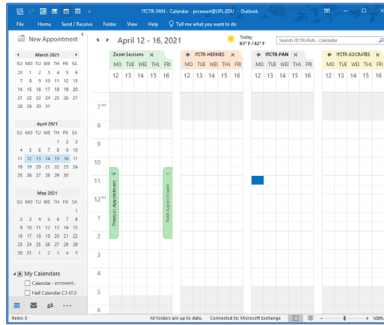
Multiple Calendars

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

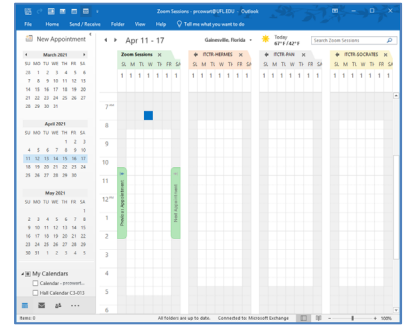
Day



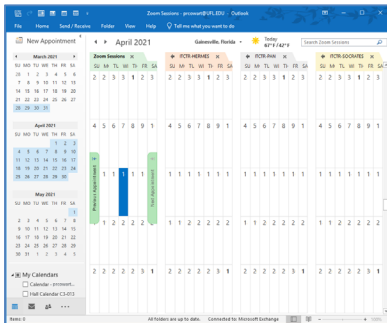
Work Week (M-F)



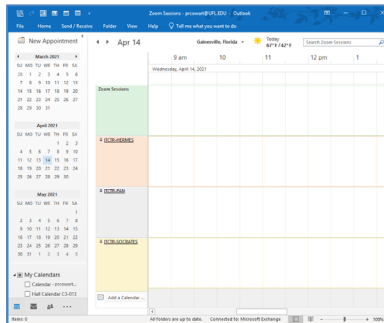
Week



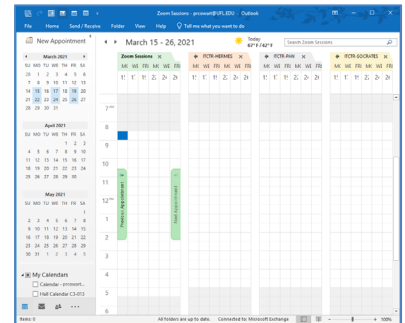
Months



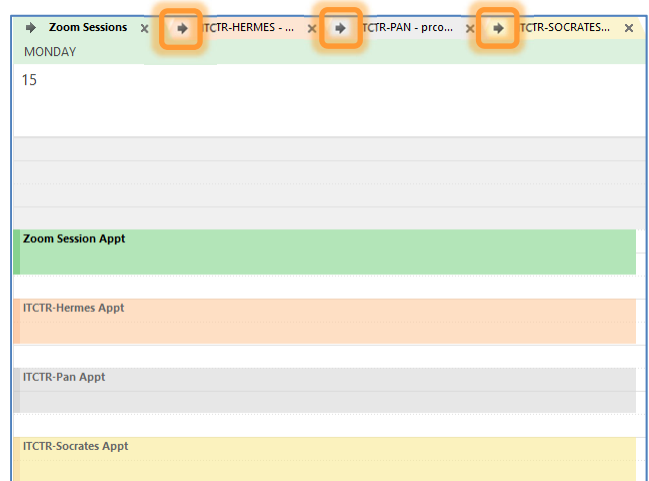
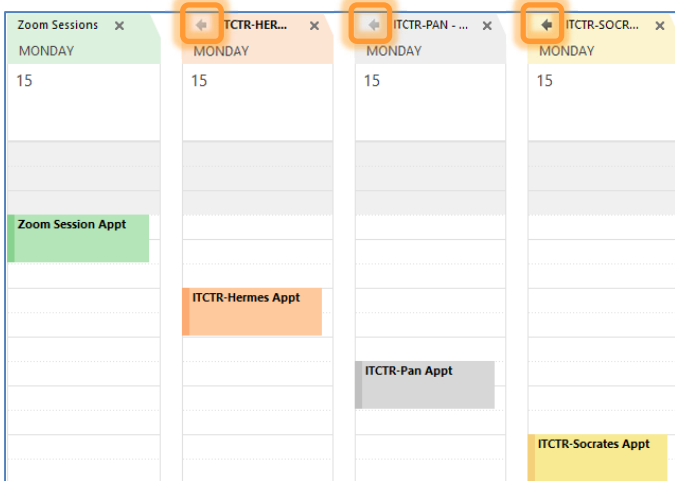
Schedule View



Custom Days



By default the calendars appear in a **Side by Side** view. 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. Click on a name at the top to focus on a calendar. Click on the little x to close a calendar.

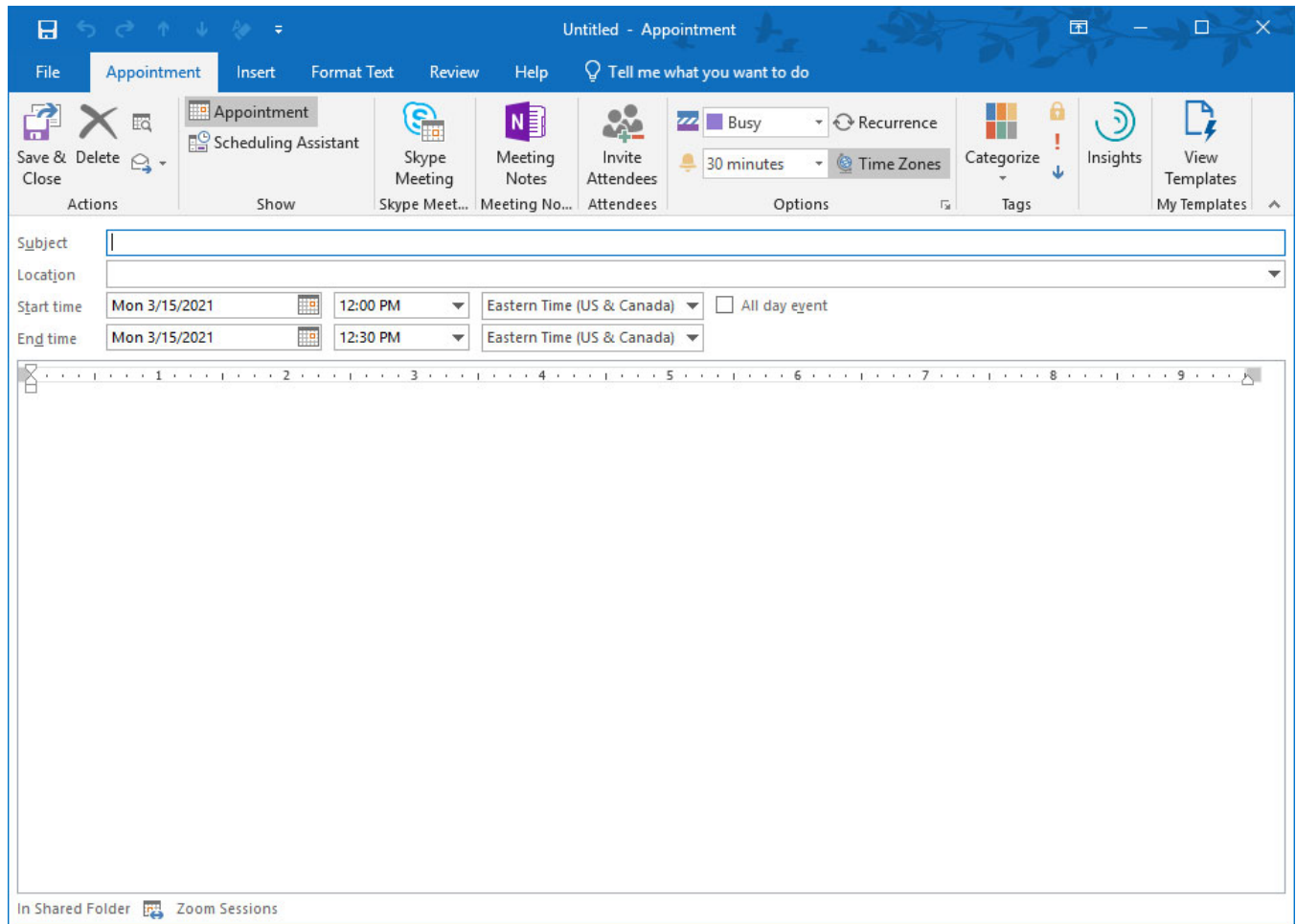


Creating Appointments

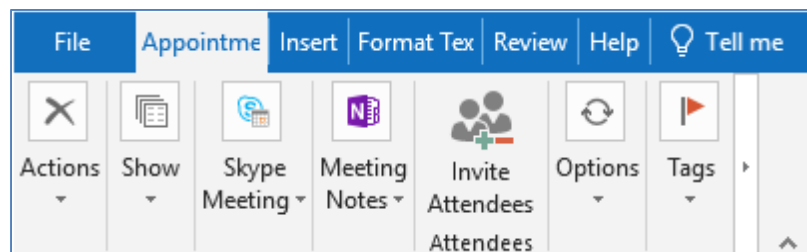
You can create a new appointment

- From the **New** button on the **Home** tab
- Using the keyboard shortcut: **Ctrl-Shift-A**
- By dragging an Outlook item to the calendar icon in the navigation pane
- By double-clicking in the calendar view
- By selecting a time frame and typing directly on the calendar

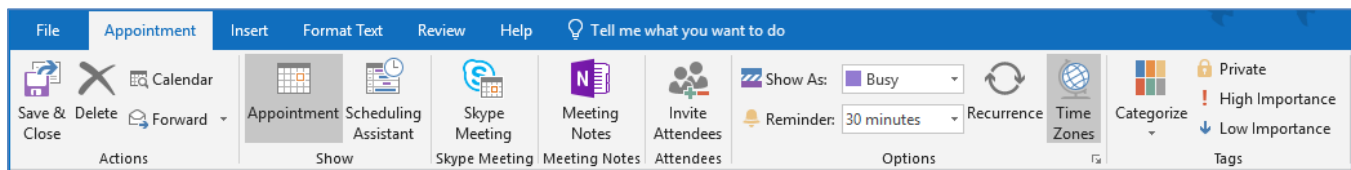
Appointment Window



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

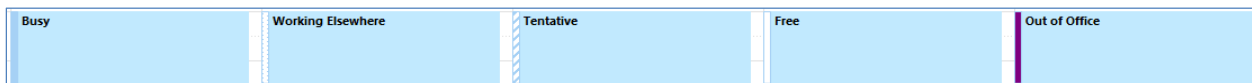
- Appointment – Change to *Appointment* view.
- Scheduling Assistant – Change to *Scheduling Assistant* view (see scheduling meetings).

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, 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.

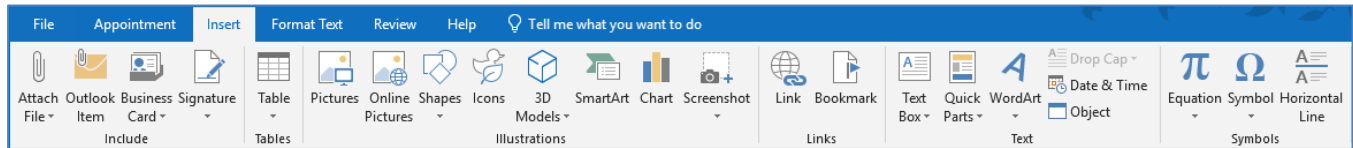
Tags Group

- 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.

Other Groups

You will see other groups in your Appointment tab depending on how your computer is set up. Above I have Skype and Meeting Notes (OneNote).

Insert Tab



Include Group

- **Attach File** – Attach a file, such as a Word document or PDF file, to the appointment.
- **Outlook 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.

Tables Group

- **Tables** – The tables menu allows you to insert a table into the body of the appointment. Outlook uses the Microsoft Word editor. Please see the handouts for Word Tables for help with these.

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**– Choose an image from the internet.
- **Shapes** – Draw a ready-made shape inside the appointment.
- **Icons** – Insert a symbol from Microsoft's list of icons. (New to Outlook 2019)
- **3D Models** – Insert a 3-D model from a file or online source.
- **Smart Art** – insert a Smart Art graphic, these can 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 images you have captured through Print Screen button or the Snipping Tool.

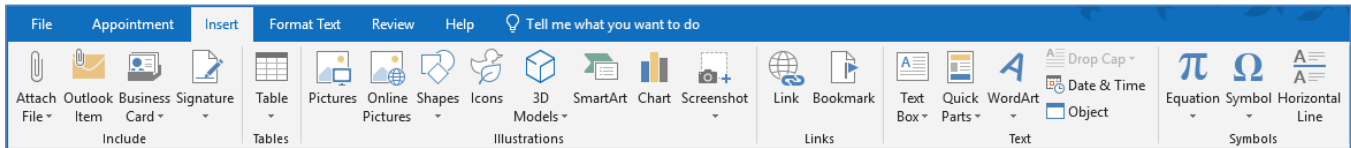
Links Group

- **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. 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 Quick Art Gallery.
- **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.
- **Object** – Inserts an embedded object. This can be a new or existing file.

Insert Tab Continued...

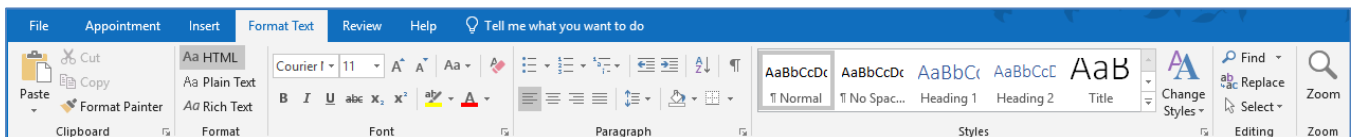


Symbol Group

- 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: ✨ ö ç
- 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 2007: Basics I** handout.



Clipboard Group

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

Format Group

- HTML – Allows for all formatting.
- Plain Text – Blocks all formatting and images. You can only type text.
- Rich Text – Allows for basic formatting.

Font, Paragraph, Styles, Editing Groups

- Standard formatting buttons, the same as you would find on the Home tab in Microsoft Word.

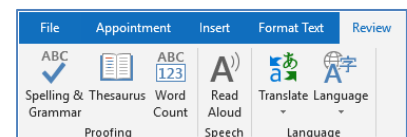
Zoom Group

- Open the **Zoom** window to specify the zoom properties.

Review Tab

Proofing Group

- *Spelling & Grammar* – Run the Spelling and Grammar check
- *Thesaurus* – Open the thesaurus tool
- *Word Count* – Show the Word Count statistics



Speech Group

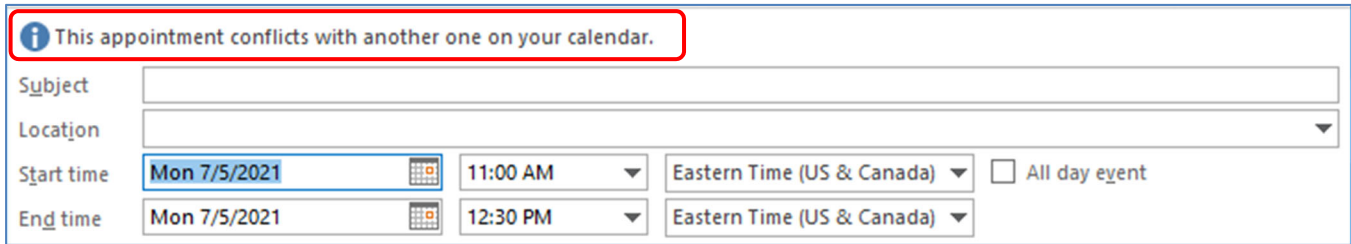
- *Read Aloud* – Read the text, and highlight each word as it's read.

Language Group

- Translate – Attempt to translate the text.
- Language – Change the language used for Spell Check.

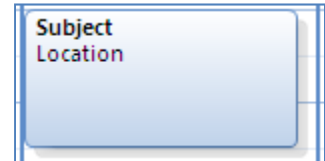
Header Values

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



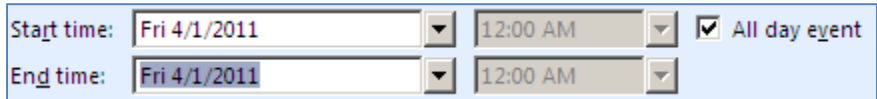
A screenshot of the Outlook appointment window. At the top, a red-bordered box contains an information icon and the text "This appointment conflicts with another one on your calendar." Below this, the appointment form includes fields for Subject, Location, Start time (Mon 7/5/2021, 11:00 AM, Eastern Time), and End time (Mon 7/5/2021, 12:30 PM, Eastern Time). There is also an "All day event" checkbox which is currently unchecked.

- **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**.



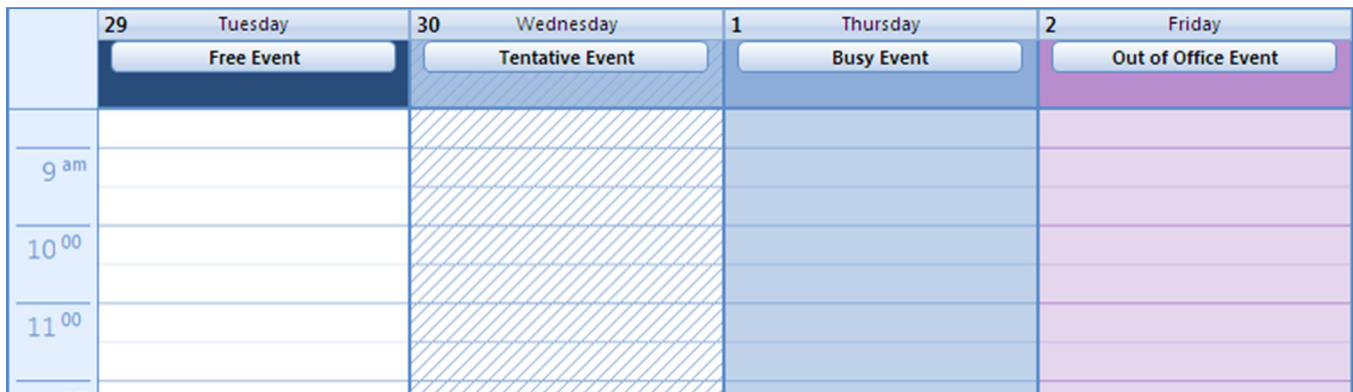
All day events

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



A screenshot of the Outlook appointment window showing the "All day event" checkbox checked. The start and end times are both set to "Fri 4/1/2011 12:00 AM".

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.



A screenshot of an Outlook calendar grid showing four days: Tuesday (29), Wednesday (30), Thursday (1), and Friday (2). Each day has a colored header bar indicating the event type: Tuesday is "Free Event" (dark blue), Wednesday is "Tentative Event" (light blue with diagonal lines), Thursday is "Busy Event" (medium blue), and Friday is "Out of Office Event" (purple). The time slots for 9 am, 10:00, and 11:00 are visible on the left.

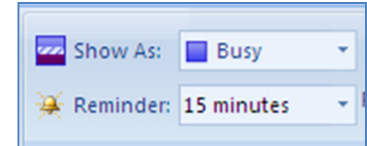
Creating an Appointment from an Email

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.

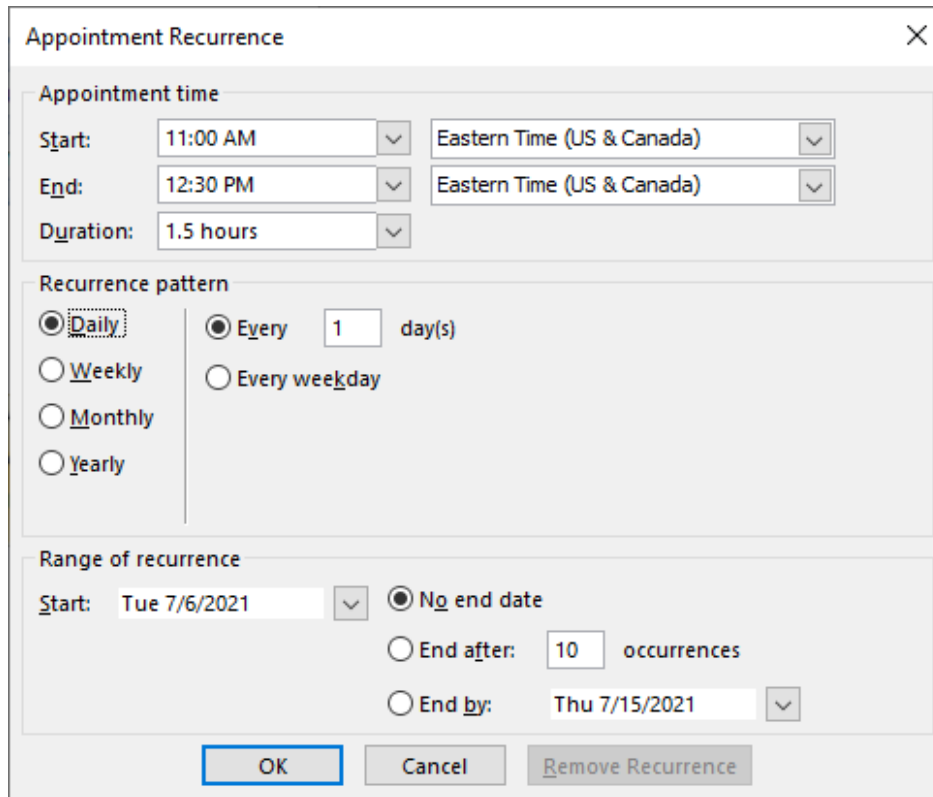
Reminders (alarms)

The default reminder is 15 minutes. This can be changed in the Calendar Options (Tools menu, Options, Preferences). 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's nice to let Outlook create the multiple instances for you.



The dialog box is titled "Appointment Recurrence" and has a close button (X) in the top right corner. It is divided into three main sections:

- Appointment time:** Contains fields for Start (11:00 AM), End (12:30 PM), and Duration (1.5 hours). Each field has a dropdown arrow. To the right of each time field is a dropdown for the time zone, both set to "Eastern Time (US & Canada)".
- Recurrence pattern:** Contains radio buttons for "Daily", "Weekly", "Monthly", and "Yearly". The "Daily" option is selected. To the right of "Daily" are radio buttons for "Every 1 day(s)" and "Every weekday".
- Range of recurrence:** Contains a "Start" field (Tue 7/6/2021) with a dropdown arrow. To its right are three radio button options: "No end date" (selected), "End after: 10 occurrences", and "End by: Thu 7/15/2021" with a dropdown arrow.

At the bottom of the dialog are three buttons: "OK", "Cancel", and "Remove Recurrence".

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, Weekly, Monthly, Yearly. The pattern of appointments will continue through the range set in this window.

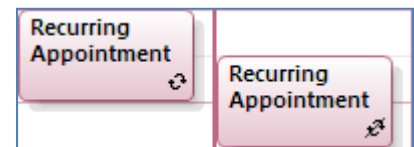
The reoccurring appointments will show a little recurrence symbol in the lower left. If an appointment is moved outside of the original time, Outlook will put a little slash through the symbol.

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

If you delete a recurring appointment, Outlook will ask if you want to remove all the occurrences, or just this one. If you choose all the occurrences Outlook will delete "all" of them: past, present and future.

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**.

Modifying Appointments

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

- Double-click on an appointment
- Right-click on an appointment and chose **Open**

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 -

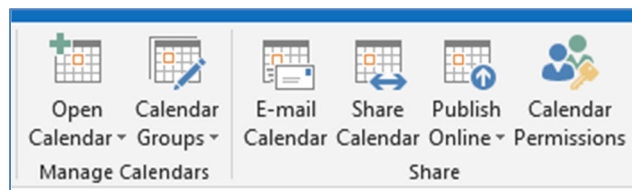
- Select an appointment and Ctrl-drag it to the new Date/Time.
- Select an appointment and use the Edit menu or keyboard short-cut (Ctrl-C) to copy, click on the new date/time and paste.

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.

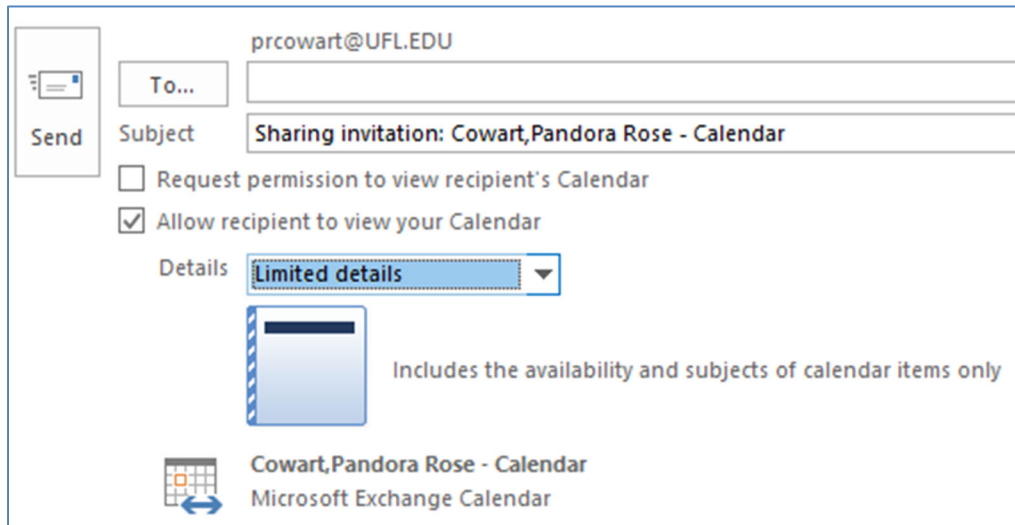
Sharing Calendars

The bottom left of the Navigation Pane, in the Calendar view, shows all of the calendars you have opened. If you have permission to view a calendar and the name does not appear in your navigation pane you will need to open it. Click inside your calendar, from the **Home** tab choose Open Calendar, and then Open Shared Calendar. Type in the username, or use the **Name...** button to find the calendar.



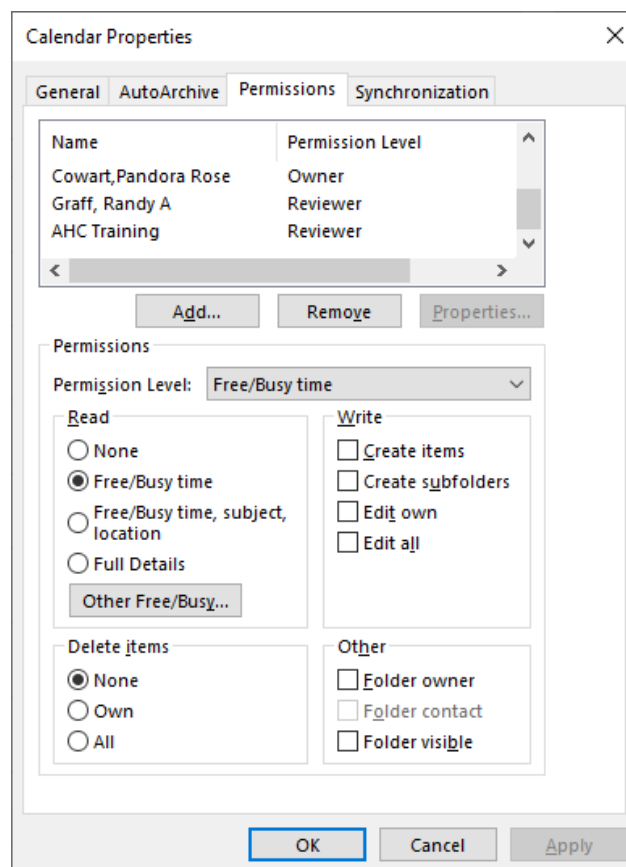
To give permissions to another person, choose **Share Calendar** from the **Home** tab.. Outlook will let you customize the request before you send it. By default, when you share your calendar the other person is considered a "reviewer", that is they can only see what's on your calendar. To allow them to do more you need to change your permission levels.

Permission Levels



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

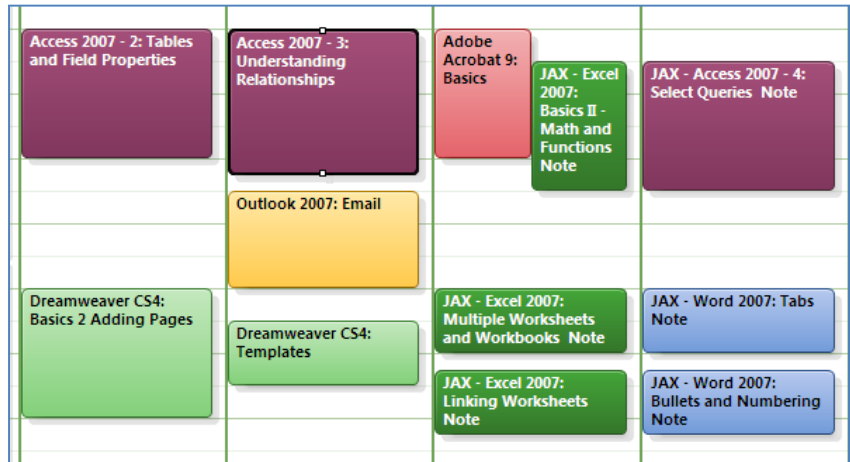
You can change the permission settings at any time. Click the **Calendar Permissions** on the **Home** tab, or by right clicking on the calendar in the **Navigation Pane** and choosing **Properties**, and turning to the **Permissions** tab.



Appointment Colors (Categories)

Sometimes it's nice to use colors to organize your calendar. 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.

