

# **Outlook Calendaring Features**

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## Disclaimer

Most of the information in this document comes from the “**Help**” sections built into the Microsoft Office Suite. Images have been inserted where appropriate.

## I. Calendar Delegate Permissions

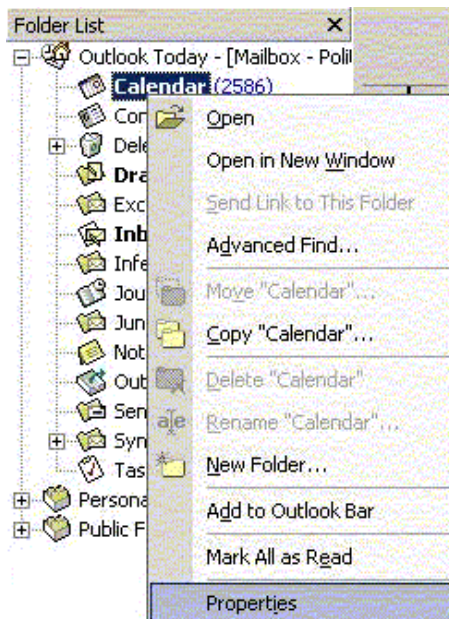
If you need to have someone schedule appointments on behalf of you in Exchange calendaring, it will be necessary to set up delegate access to your calendar. There are different levels of access you can grant (see chart 1 at the end of this document).

By following the steps below, you will be able to grant the correct privileges to your calendar so that people can schedule on your behalf. This practice is most common for Executive Assistants.

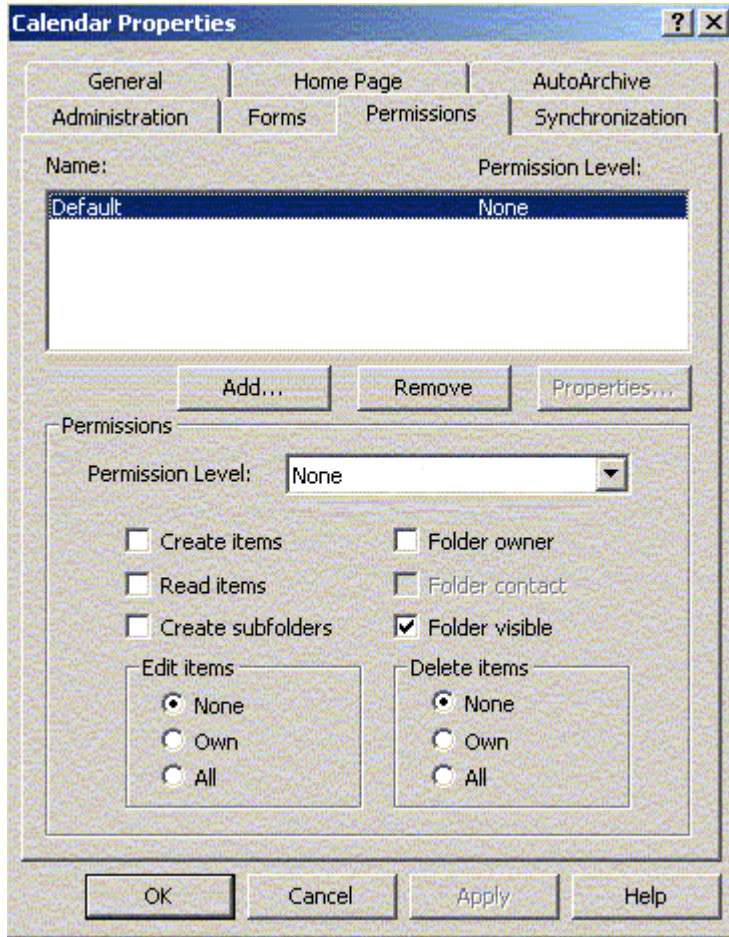
NOTE: This is not necessary for scheduling appointments on other people's calendar. Free/Busy provides the necessary information

### *Grant delegate permissions in Microsoft Calendar*

1. Open the Outlook Client
2. Select the **Calendar** folder under Outlook Today – [Mailbox – Your Name]
3. Right Click on the **Calendar** Folder, and select '**Properties**' as shown in **Figure 1**.

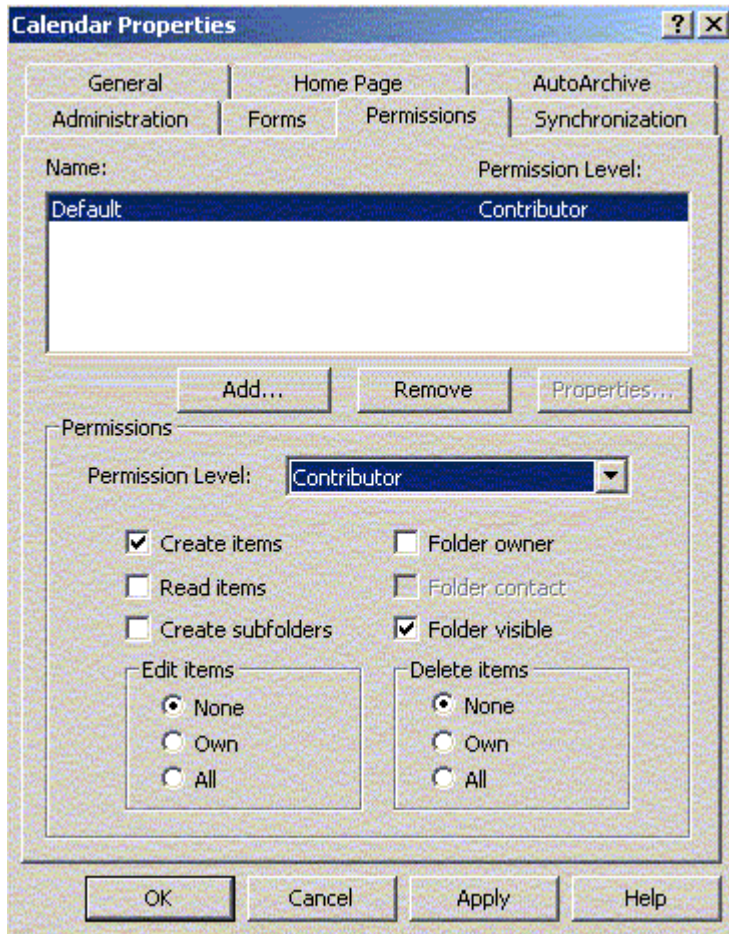


4. The following dialogue box opens:

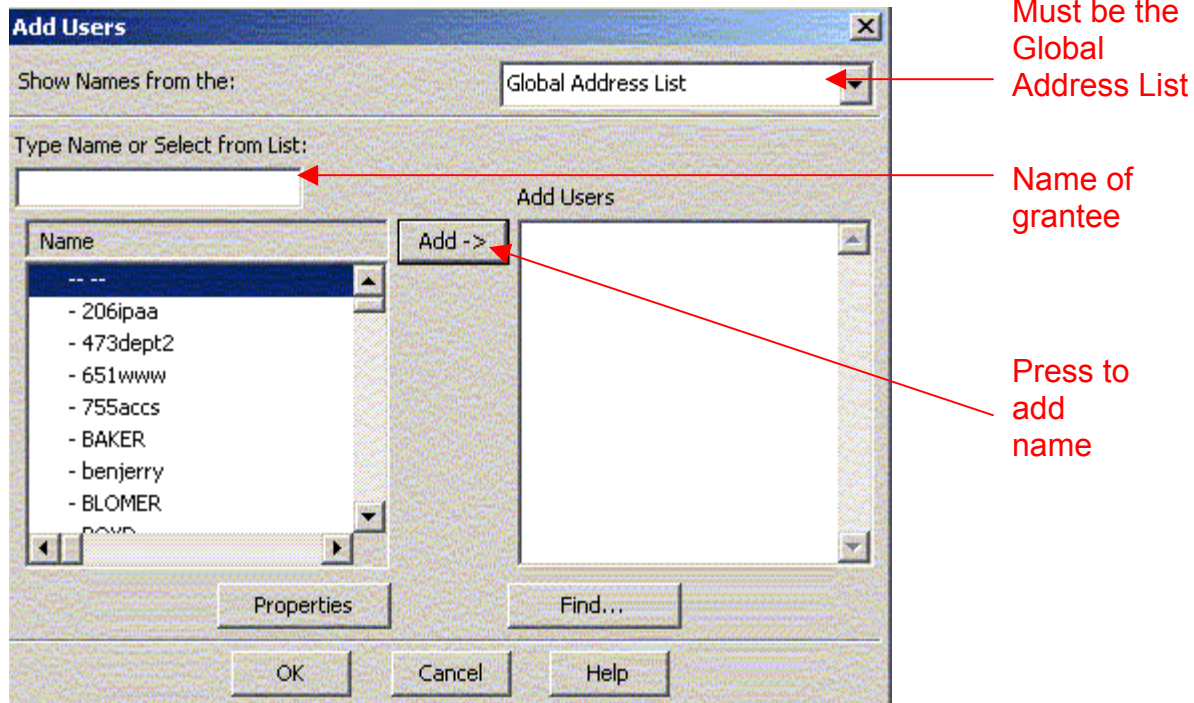


5. At this point, you will need to decide what level of access individuals will have to your calendar. The default access level to all users is “None”. See chart 1 for a description of each permission.

6. For the average user who wishes all to see and schedule on his/her calendar, “Contributor” would probably be best. This will allow individuals to see your busy times, but not read the actual content appointments.



- It is possible to grant access to specific users. To do this, select the “Add” button, the following window will open:



- Make certain to choose “Global Address List” in the top right. Once that is accomplished, type the name of the person you wish to grant access to in the “Type Name or Select from List” field.
- Once the user name appears, highlight the selection, and press the “Add->” button, click OK.
- Set the correct permission level for that user by repeating steps 1-7.

## II. Schedule an appointment on your calendar

*Schedule a meeting* (Note: This is just one of many methods)

- If you are not already in your calendar folder, switch to it by selecting the **Calendar** folder in your Exchange mailbox.
- On the **Actions** menu, click **Plan a Meeting (Figure 1)**.

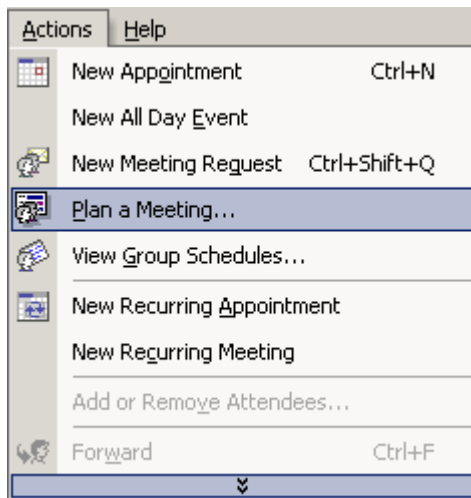


Figure 1

3. Click **Add Others**, and then click **Add from Address Book.** (Figure 2)

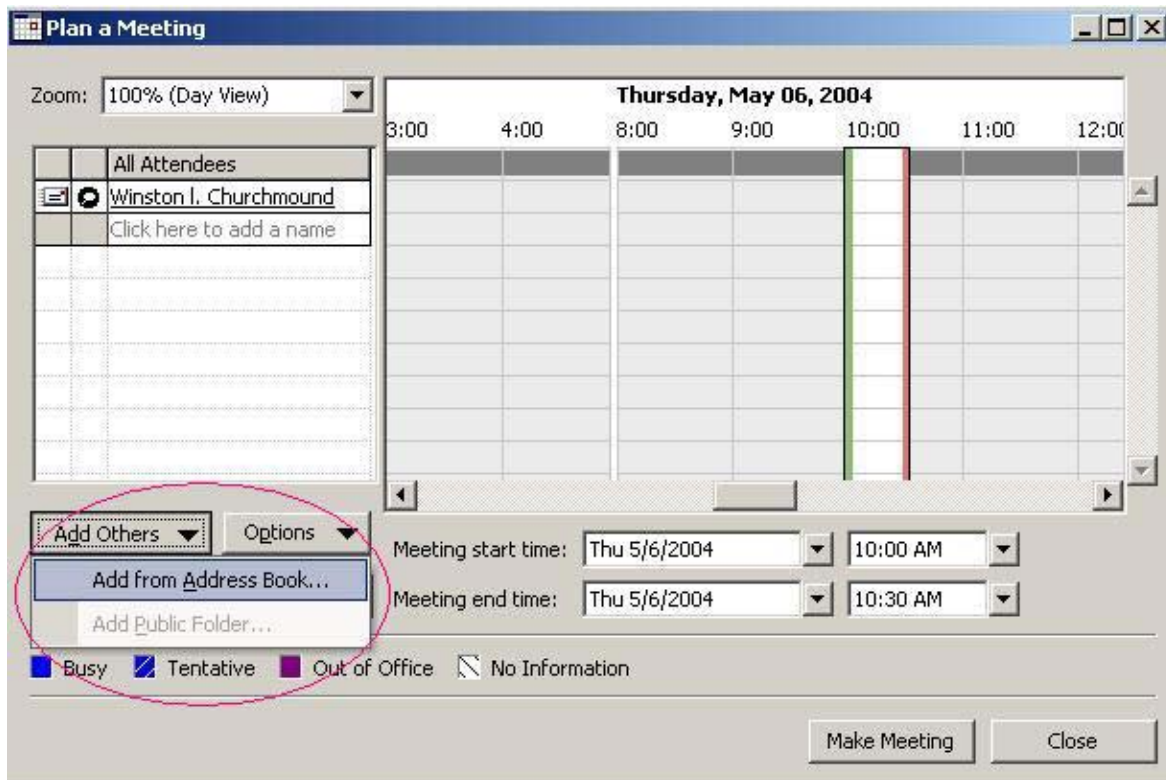
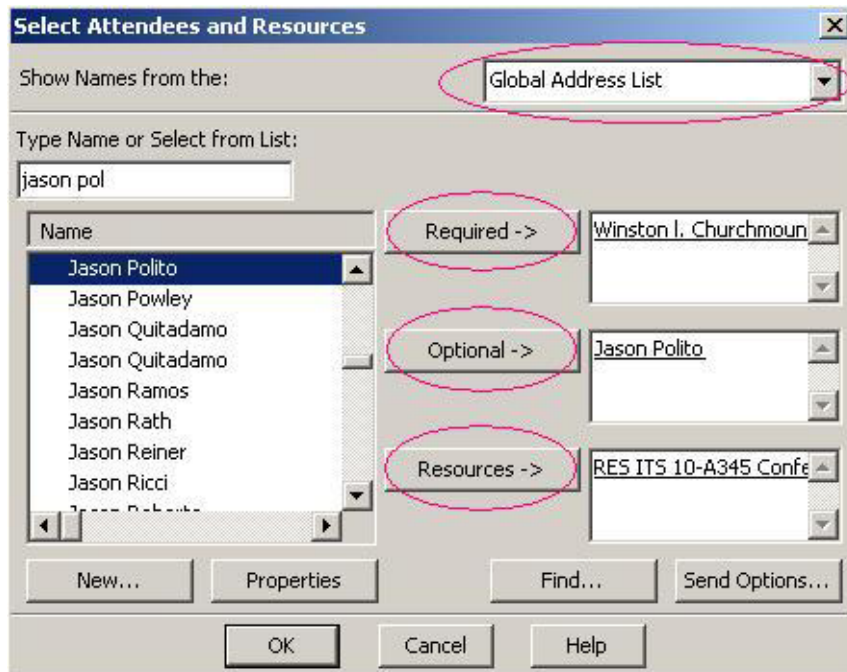


Figure 2

4. In the **Type name or select from list** box, enter the name of a person or resource you want at the meeting (**Figure 3**) Be certain that the **Global Address List** is selected.



**Figure 3**

5. For each name entered (**Figure 3**), click **Required**, **Optional**, or **Resources**. (The **Required** and **Optional** attendees appear in the **To** box on the **Appointment** tab, and **Resources** appear in the **Location** box. To get details on a conference room, click it in the **Resources** list, and then click **Properties**.) Click **OK**.
  - NOTE: Resources in the GAL will begin with RES, followed by department, location, and finally name. This helps organize them in the GAL so that they are easy to locate.
6. Click a time when all invitees are available. You can use **AutoPick Next** to find the next available free time for all invitees (**Figure 4**).

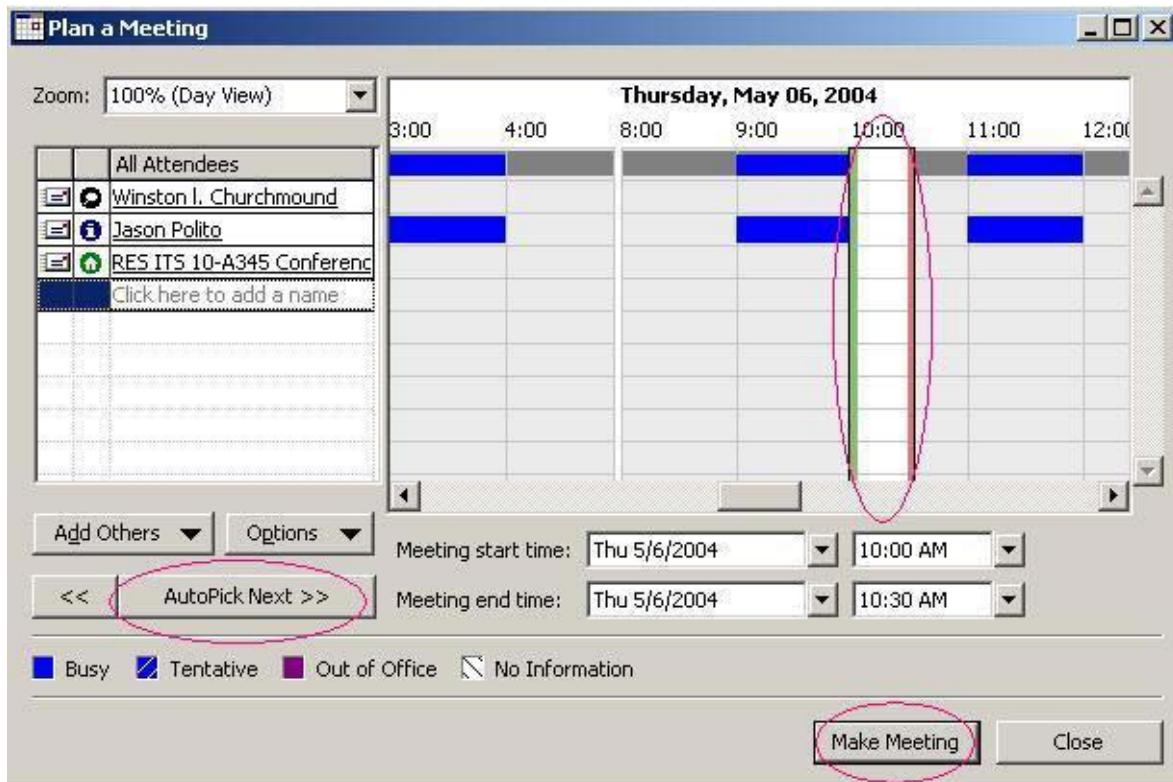


Figure 4

7. Click **Make Meeting (Figure 4)**.
8. In the **Subject** box, type a description (**Figure 5**).

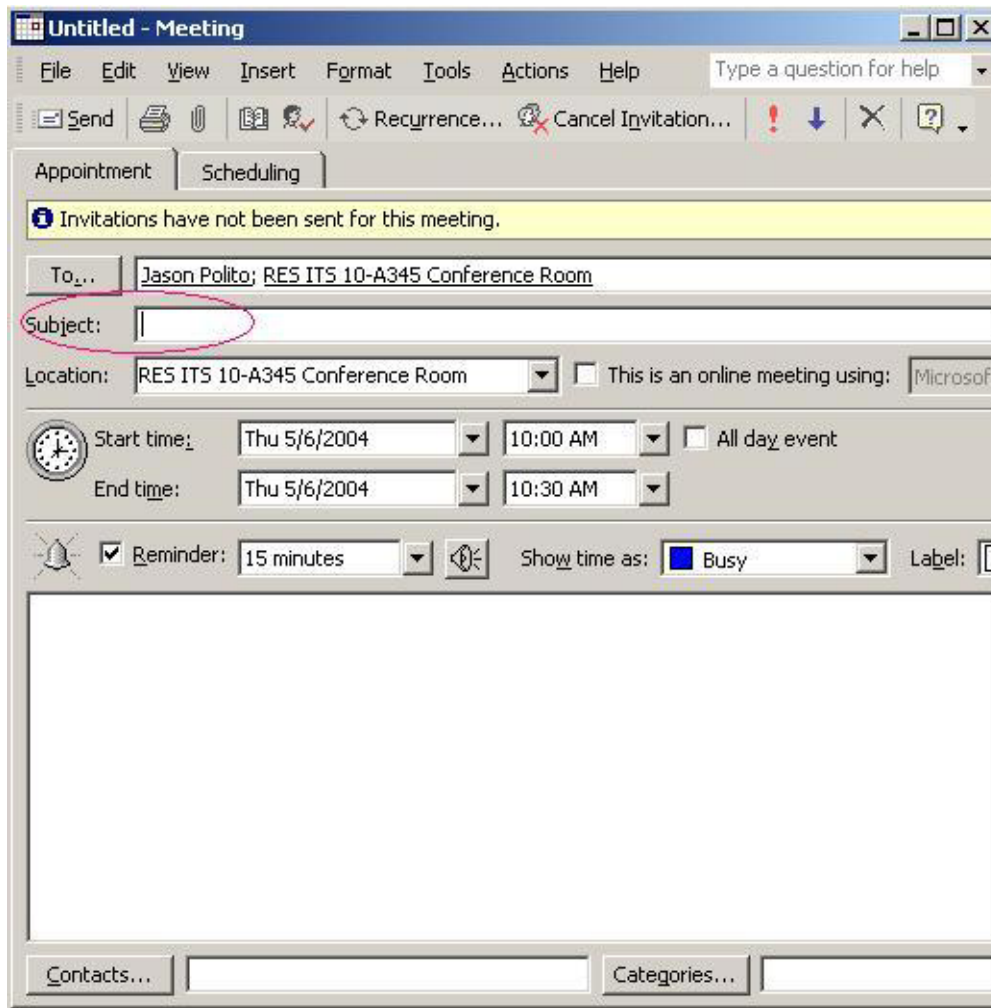


Figure 5

9. If you did not schedule a room, enter the location in the **Location** box.
10. If you want to make the meeting recurring, click **Recurrence**, and then select the recurrence pattern (**Figure 6**).

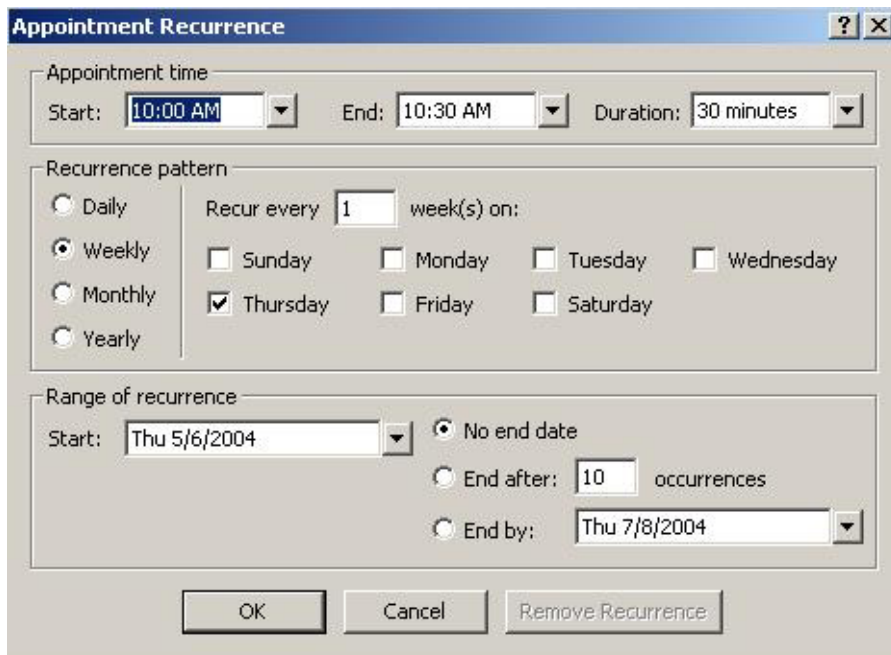


Figure 6

11. Select any other options you want.
12. Click **Send** (shown on **Figure 5**)

### III. Change the look of your calendar

This section will explain how to change the look and feel of Exchange Calendar. Following the steps below, you will be able to change the view of your calendar to be day, week, month or timeline. In addition, the concept of color coding will also be used.

In your Outlook Calendar, you can use colors to help you manage your appointments. For example, you can choose colors with predefined labels such as "Personal", "Needs Preparation," or "Must Attend;" or, you can create your own labels. Here's how:

*To color an appointment or meeting with a predefined label:*

1. Click Calendar.
2. Right-click an appointment or meeting, point to **Label** on the shortcut menu, and then click a color-coded label in the list. (To remove the color from the appointment or meeting, in the **Label** list, click **None**.)

### *To create your own colored label:*

1. Click **Calendar**.
2. Right-click an appointment or meeting, point to **Label** on the shortcut menu, and then click **Edit Labels**.
3. Pick the color you want to rename, type in your new label name, and then click **OK**.

### *Change the Day/Week/Month view*

1. Click **Calendar**.
2. On the **View** menu, point to **Current View**, and then click **Customize Current View**.
3. Click **Other Settings**.
4. Do any of the following:
  - To change the day display, change the **Time Font**, **Font**, and **Time scale**.
  - To display appointment end times, under **Week** or **Month**, select the **Show end time** check box.
  - To display weekends together, select the **Compress weekend days** check box.
  - To display appointment times as miniature clocks, under **Week** or **Month**, select the **Show time as clocks** check box.

## **IV. View calendar in separate window**

1. Right click the calendar folder
2. Select '**Open in New Window**'

## **V. Create a group calendar**

### *Create a group schedule*

1. Select the **Calendar** folder.
2. Select the **Schedules** button (**Figure 7**).

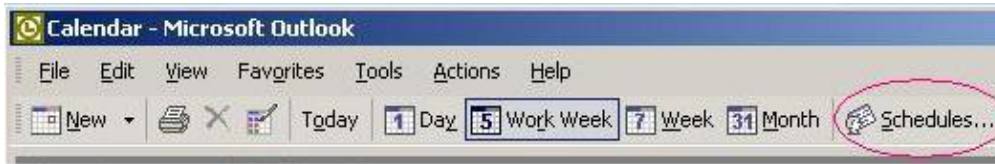


Figure 7

3. Click the **New** button. (Figure 8)

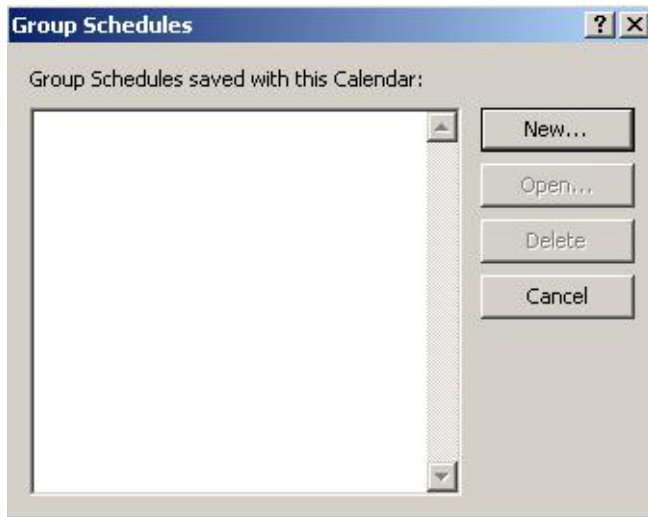


Figure 8

4. Type a name for the new group schedule, and then click **OK** (Figure 9).



Figure 9

5. Click **Add Others**, and then click either **Add from Address Book** (Use the GAL) Use the same method as described in **Figures 2 & 3**.
6. Select the names or the public folder, and then click **OK**.

## *View a group schedule*

- Select the group schedule you want to view, and then click **Open (Figure 10)**.

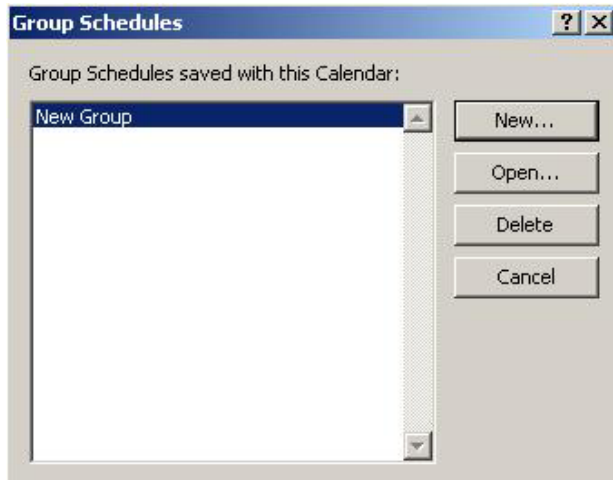


Figure 10

## *Delete a group schedule*

- Select the group schedule you want to delete, and then click **Delete**.

## **VII. Change an appointment, event, or meeting**

1. Open the appointment, event, or meeting you want to change.
2. Do one of the following:

### *To change options for an item that is not part of a series*

- On the **Appointment** tab, change the options, such as subject, location, and time, that you want to change, and then click **Save and Close**.

### *To change options for all items of a series*

1. Click **Open the series**, and then change any options, such as subject, location, and time, that you want to change on the **Appointment** tab.
2. To change recurrence options, click the **Actions** menu, click **Recurrence**, change the options, such as time, recurrence pattern, or range of recurrence, that you want to change, and then click **OK**.
3. Click **Save and Close**.

## *To change options for one item that is part of a series*

- Click **Open this occurrence**.
- On the **Appointment** tab, change the options, such as subject, location, and time, which you want to change, and then click **Save and Close**.

### *Tips*

- In **Calendar**, you can drag the appointment, event, or meeting to a different date. You can also edit the subject by clicking the description text and typing your changes.
- You can change an event into an appointment, causing the time to be blocked out in your **Calendar**, by clearing the **All day event** check box and then entering start and end times. Events are defined as lasting from midnight to midnight; clearing this check box allows you to enter specific times.

## **VIII. Delete an Appointment**

1. Open the item.  
Select one or more items in the main Microsoft Outlook window.
  - To select adjacent items, click the first item, and then hold down SHIFT and click the last item.
  - To select nonadjacent items, click the first item, and then hold down CTRL and click additional items.
  - To select all items, click the **Edit** menu, and then click **Select All**.

**Note** Changing the view for items can make selecting specific items easier. For instance, if you want to select all messages that have the same subject, in the folder containing the messages, click **View**, point to **Current View**, and then click **By Conversation Topic**. Select the messages you want from the view.

2. On the toolbar, click **Delete**. The items are moved to the **Deleted Items** folder.
3. To permanently delete the items, empty the **Deleted Items** folder.

# Chart 1

## Outlook folder permissions

This feature requires you to be using a Microsoft Exchange Server e-mail account. If your administrator has set up a public folder, you may have permission to use some or all of the folders within the public folder. If someone has shared one of their private folders with you or designated you as a for that folder, then you have permission to perform certain activities in that folder. The extent of the activities you can perform in a public folder, shared private folder, or folder you are a delegate for, depends on your role (or combination of permissions) in that folder, as described next.

With this permission level (or role)	You can
Owner	Create, read, modify, and delete all and files, and create subfolders. As the folder owner, you can change the permission levels others have for the folder. (Does not apply to delegates.)
Publishing Editor	Create, read, modify, and delete all items and files, and create subfolders. (Does not apply to delegates.)
Editor	Create, read, modify, and delete all items and files.
Publishing Author	Create and read items and files, create subfolders, and modify and delete items and files you create. (Does not apply to delegates.)
Author	Create and read items and files, and modify and delete items and files you create.
Contributor	Create items and files only. The contents of the folder do not appear. (Does not apply to delegates.)
Reviewer	Read items and files only.
Custom	Perform activities defined by the folder owner. (Does not apply to delegates.)
None	You have no permission. You can't open the folder.

**Note:** With author or editor permissions, a delegate has send-on-behalf-of permission. Sent messages contain both the manager's and delegate's names. Message recipients see the manager's name in the Sent On Behalf Of box and the delegate's name in the From box.

Source:

<http://office.microsoft.com/assistance/hfws.aspx?AssetID=HP052422871033&CTT=98>

## Glossary

**Delegate** - Someone granted permission to open another person's folders, create items, and respond to requests for that person. The person granting delegate permission determines the folders the delegate can access and the changes the delegate can make.

**Item** - An item is the basic element that holds information in Outlook (similar to a file in other programs). Items include e-mail messages, appointments, contacts, tasks, journal entries, notes, posted items, and documents.)

**Meeting** – Similar to a Appointment, but can be held virtually in a chat room type environment.

**Appointment** – The most common way to schedule face to face meetings with in

### Contacting the ITS HelpDesk

**Phone Support:** (585) 475-HELP or 475-2810 (TTY)

**Email:** [helpdesk@rit.edu](mailto:helpdesk@rit.edu)

**Web Address:** <https://www.rit.edu/its/>

**In Person:** Gannett Building, Room 7B-1113

### Contacting the Resnet (Residential Computing) HelpDesk

**Phone Support:** (585) 475-2600 or 475-4927 (TTY)

**Email:** [resnet@rit.edu](mailto:resnet@rit.edu)

**Web Address:** <https://www.rit.edu/its/services/resnet/>

**In Person:** Nathaniel Rochester Hall (Building 43), Room 1034

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