NCI Technologies presents:

Microsoft® Office Outlook® 2003 Training

Organise meetings with Outlook

Course contents

- Overview: Organise meetings and attendees
- Lesson 1: Who's who and what’s what
- Lesson 2: When you are the meeting organiser
- Lesson 3: When you receive a meeting request

Each lesson includes a list of suggested tasks and a set of test questions.

Overview: Organise meetings and attendees

Using Outlook to keep track of meetings can save you time and prevent aggravation because Outlook uses e-mail and the Calendar to keep the details straight.

To get the best use from this feature, it helps to understand who's who and what's what in Outlook meetings. That's what this course will help you do.

Course goals

- Identify the basic components required for organising a meeting and know what goes on behind the scenes.
- Set up a meeting, see who's coming, make changes, and keep everyone updated.
- Manage and respond to meeting requests.

Lesson 1

Who's who and what’s what

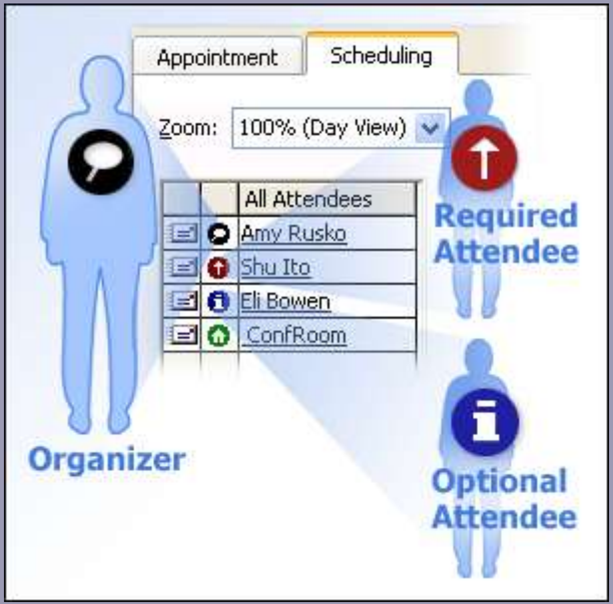
Who's who and what’s what

The components of a meeting

A successful meeting requires three basic components: an organiser, participants, and a location. Outlook meetings are no different.

In an Outlook meeting, each person involved has a distinct role that dictates what that person does and the amount of control he or she has.

The players

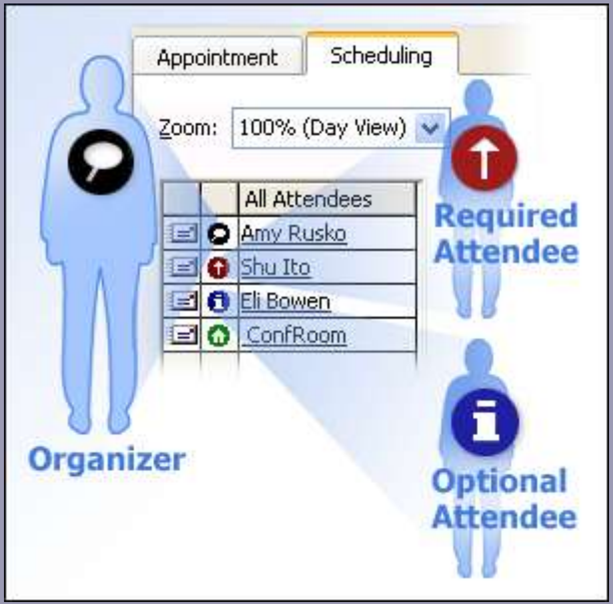


Each meeting member has its own icon.

Outlook meetings are activities you schedule in your Calendar that involve inviting other people or reserving resources.

In Outlook, each "player" in the meeting is represented by an icon that you can see on the **Scheduling** tab of a meeting request.

The players

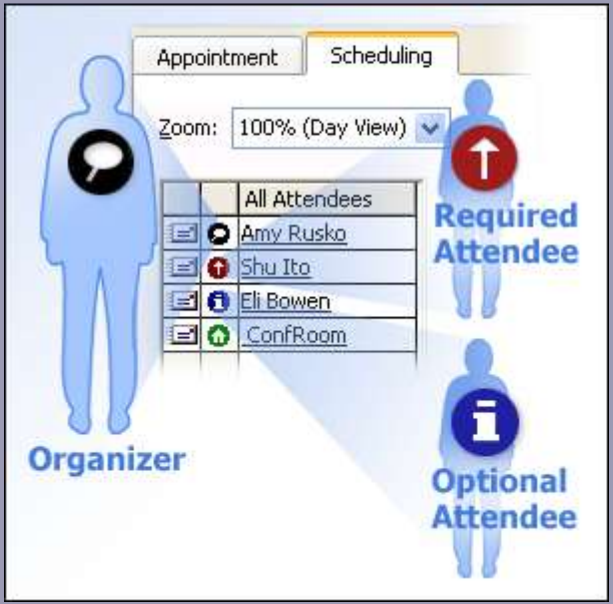


Each meeting member has its own icon.

Meeting organiser: Whoever sets up a meeting becomes the meeting organiser.

The organiser is the only person who can change the meeting details once it has been set up.

The players

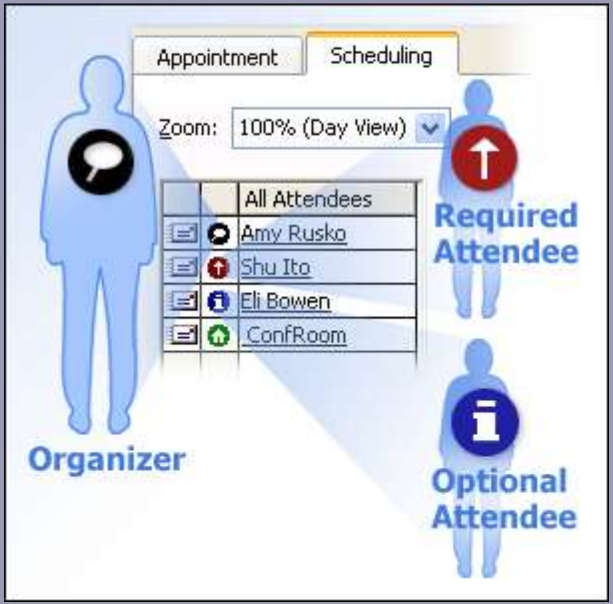


Each meeting member has its own icon.

Attendee: Anyone who is invited to the meeting is considered an attendee.

There are two categories of attendee: required and optional. Once an attendee is added to the attendee list, that person will always be considered an attendee for the meeting.

The players

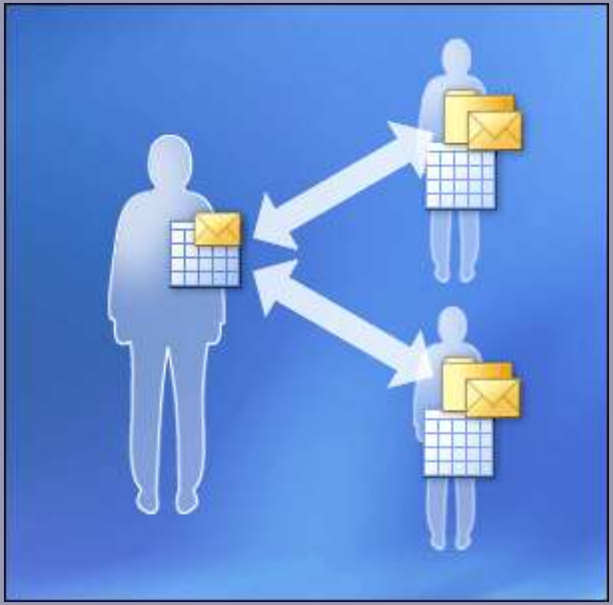


Each meeting member has its own icon.

Location/Resource: The place the meeting will occur is the location, sometimes referred to as a resource.

How you specify a location (or resource) for the meeting will depend on how things are set up at your organization.

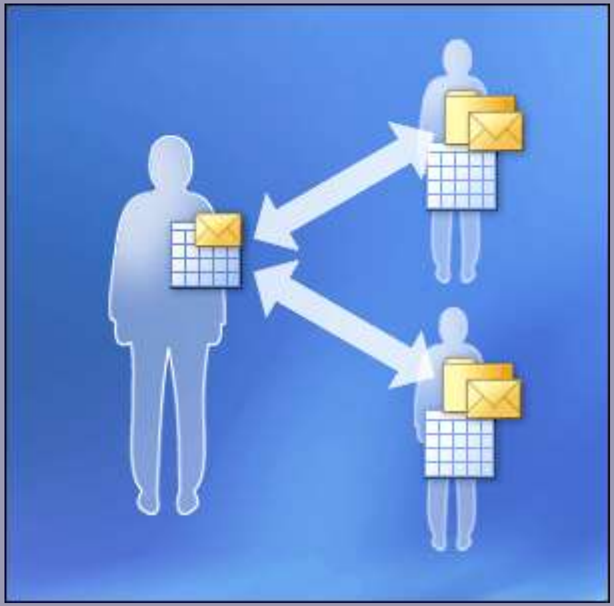
The process



When meetings are scheduled and maintained in Outlook, you can greatly improve the efficiency of the process because Outlook keeps track of the details using the Inbox and the Calendar.

When these details change, they can be updated for everyone, all at once, with the click of a button.

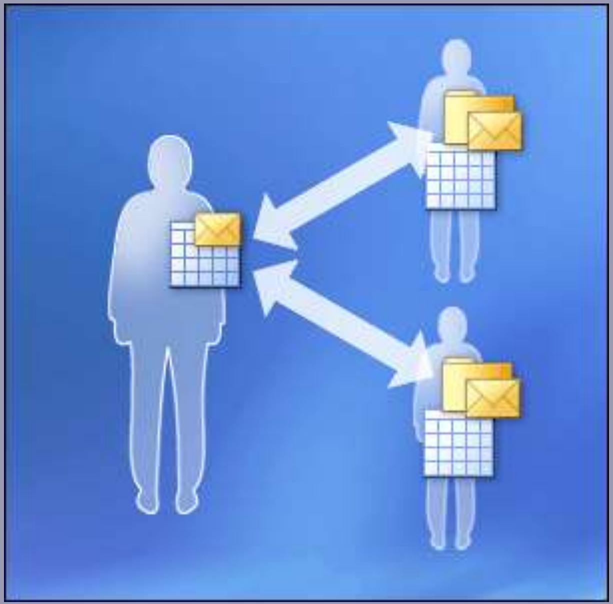
The process



Here's a quick overview of the process:

- The meeting organiser sends a meeting request to attendees.
- The request goes both to the Inboxes and the Calendars of the attendees.
- Responses go back to the meeting organiser.

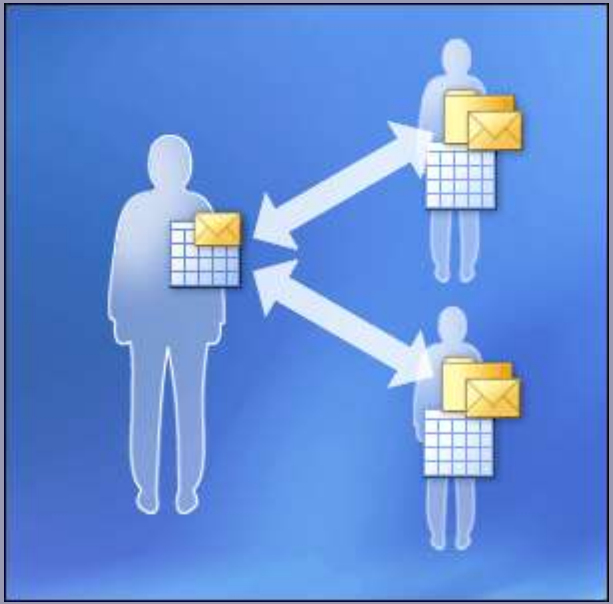
The process



The **meeting organiser** schedules the meeting and sends all of the participants a special type of message called a **meeting request**.

This request is delivered to the Inboxes of all of the meeting participants.

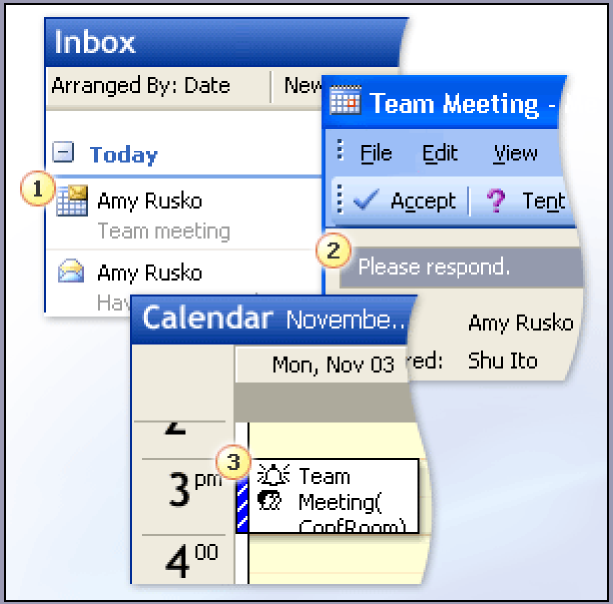
The process



Attendees read the request and respond. A **meeting response**, which is similar to a meeting request, is sent to the meeting organiser's Inbox.

As Outlook receives each response, the meeting entry is updated in the organiser's calendar with information about who is coming.

What's going on behind the scenes

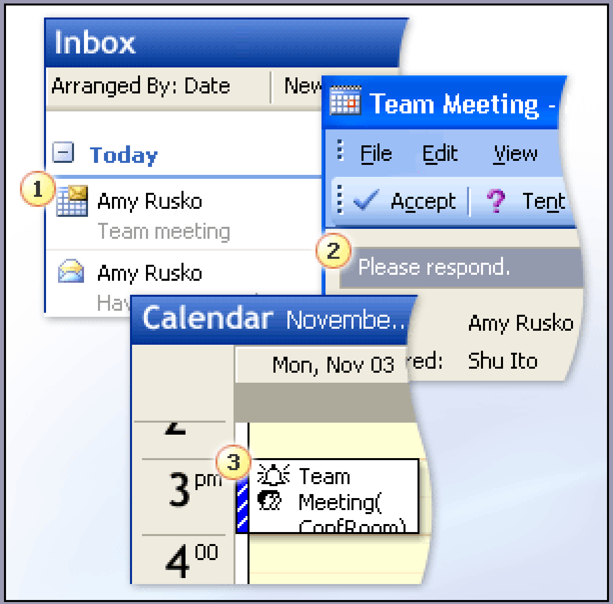


A meeting request and a tentative response

Outlook works behind the scenes to maintain the connections between meeting requests, responses, and entries in your Calendar. See the image at left.

1. A meeting request sent to an attendee.
2. The Infobar.
3. A tentative Calendar entry for the meeting.

What's going on behind the scenes

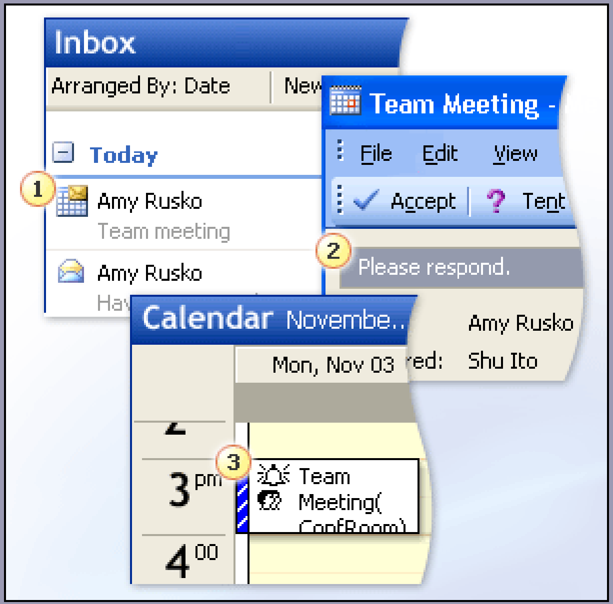


A meeting request and a tentative response

The comings and goings of meeting requests and their related calendar entries are tracked in Outlook by something nicknamed the "sniffer."

You'll see the work of the sniffer by looking at the **Infobar** of a meeting request in your Inbox or a meeting entry in your Calendar.

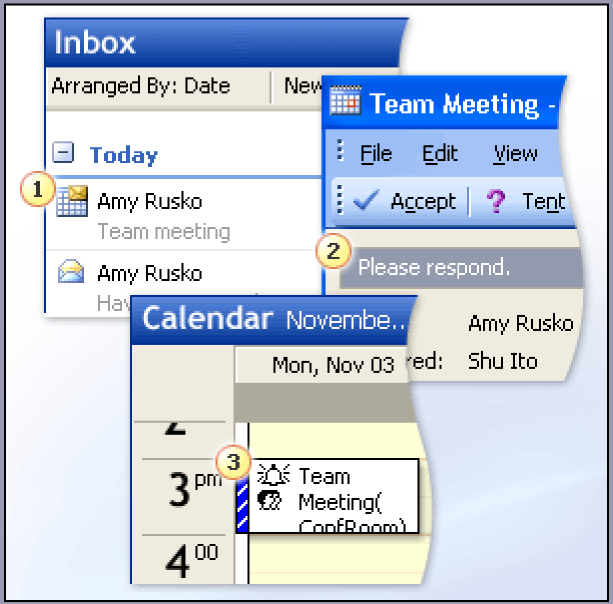
What's going on behind the scenes



A meeting request and a tentative response

When you're a meeting organizer: The meeting requests you send to your attendees, as well as their responses, are detected by the sniffer as they sit in your Inbox. The sniffer then updates the Calendar and the requests themselves with the relevant information.

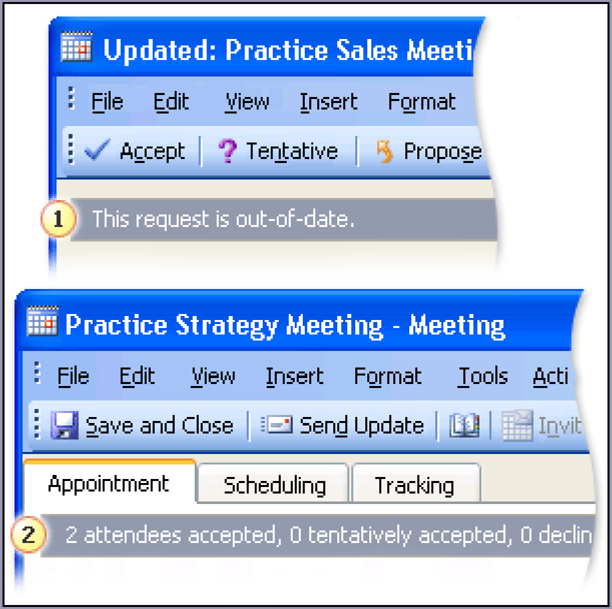
What's going on behind the scenes



A meeting request and a tentative response

When you're an attendee: When you receive a meeting request, the sniffer automatically enters that request as a tentative item in your calendar to help reduce your chances of getting double-booked.

What's going on behind the scenes



A meeting request in the Inbox

The Infobar in two different meeting requests.

1. The Infobar in a meeting request to an attendee that has been subsequently updated.
2. The Infobar for a meeting in the meeting organiser's Calendar showing a quick count of how many attendees have accepted and how many have declined.

Suggestions for practice

1. Make a meeting.
2. Cancel the meeting.
3. See the "sniffer" in action.

Online practice (requires Outlook 2003)

Test 1, question 1

In an Outlook meeting, ______ controls the meeting. (Pick one answer.)

1. The organiser.
2. The first attendee to accept.
3. The resource.

Test 1, question 1: Answer

The organiser.

The person who sets up the meeting controls it. In Outlook, that's the meeting organiser.

Test 1, question 2

Which of the following is NOT considered a meeting attendee? (Pick one answer.)

1. Someone who is not invited to the meeting at all.
2. Someone who declines the meeting request.
3. A person who accidentally moves the meeting out of his Inbox.

Test 1, question 2: Answer

Someone who is not invited to the meeting at all.

Anyone whose name appears on the meeting request is an attendee. Anyone who isn't on the request is not an attendee.

Test 1, question 3

In Outlook, ______ links your Inbox and your Calendar and keeps entries in each up to date. (Pick one answer.)

1. The "smeller."
2. The "sniffer."
3. The "stinker."
4. The "auto organiser detector."

Test 1, question 3: Answer

The "sniffer."

Lesson 2

When you are the meeting organiser

When you are the meeting organizer

The meeting organiser sets up the meeting.

As the meeting organiser, you are the one who is in control of the meeting.

You invite people to the meeting, arrange for a place to meet, and choose the meeting's time and duration.

When you are the meeting organizer

The meeting organiser sets up the meeting.

But what if people aren't available when you call or come by?

Phone messages and sticky notes aren't always efficient, especially if you're trying to reach a big group. And what if you have to reschedule?

Outlook can help.

Start with the meeting request

New Meeting Request and Plan a Meeting commands

As the meeting organiser, you set up the meeting and you control it in the Calendar.

Your first step is to create the meeting request, which you always do from the Calendar.

Start with the meeting request

New Meeting Request and Plan a Meeting commands

The picture on the left shows you three ways to start your meeting request.

1. On the **Actions** menu, click **New Meeting Request**. Or...
2. On the **Actions** menu, click **Plan a Meeting**. Or...
3. Right-click a selected time in your calendar, and click **New Meeting Request**.

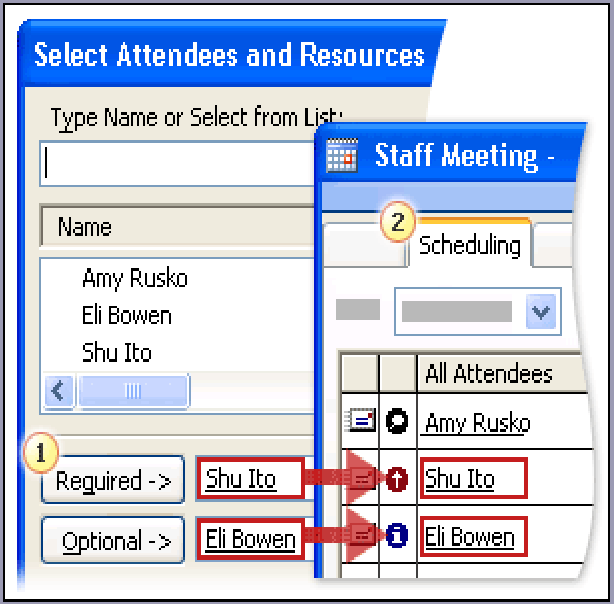
Start with the meeting request

New Meeting Request and Plan a Meeting commands

Every request should include three basic details:

- The people who will attend the meeting.
- The time and duration of the meeting.
- A place to meet.

Attend to your attendees

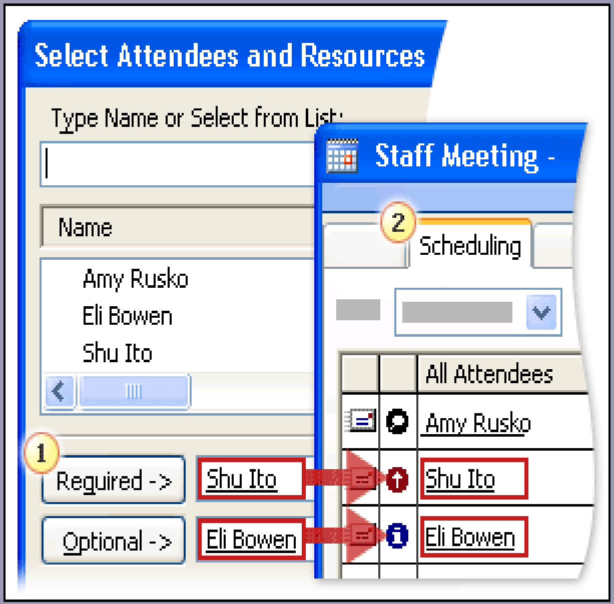


Select Attendees and Resources dialogue box

You can't have a meeting by yourself. Therefore, a key step in creating your meeting request is to choose people for your attendee list.

The best way to add attendees to your meeting is to use the Address Book, which you can easily access from the **Select Attendees and Resources** dialogue box.

Attend to your attendees



Select Attendees and Resources dialogue box

See the image at left.

1. The **Select Attendees and Resources** dialogue box lets you specify whether an attendee is Required or Optional.

2. Icons on the **Scheduling** tab help you keep track of your choices.

Find time with the Scheduling tab

The Scheduling tab at a company using Microsoft Exchange Server.

We mentioned that one thing that may influence your choice for how you set up meetings will be the type of e-mail system your company uses.

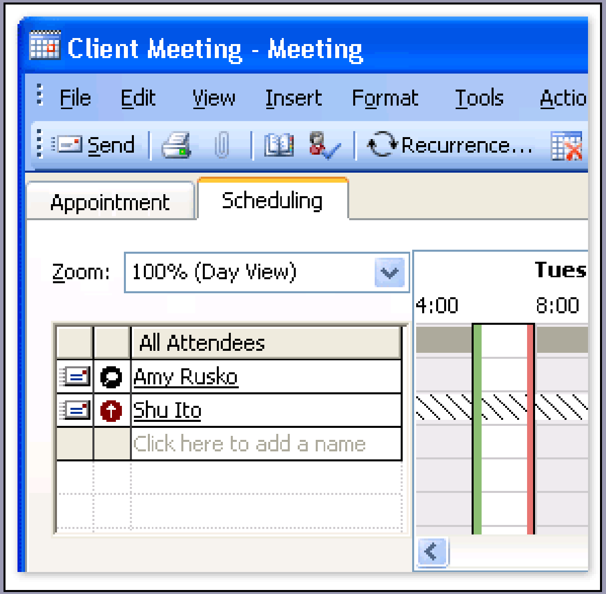
If your organisation uses Microsoft Exchange Server for your e-mail, you'll have the ability to check the schedules of your coworkers before you set up a meeting.

Find time with the Scheduling tab

The Scheduling tab at a company using Microsoft Exchange Server.

1. Coloured horizontal bars show time constraints, such as Free, Busy, or Out of Office.
2. The green and red vertical bars represent the start and end times of the meeting you're setting up.
3. To quickly find a time when everyone is available, click **AutoPick Next**.

Find time with the Scheduling tab



The Scheduling tab with free/busy information unavailable.

With Microsoft Exchange Server, people in your organisation share information about their schedules automatically. In Outlook, this information is called **free/busy time**.

The function of the **Scheduling** tab is to let you check free/busy time for all of your meeting participants, all at once.

Location, location, location

The Location box in a meeting request.

Logically enough, by filling in the **Location** box of the meeting request, you let everyone know where your meeting will be located. How this box gets filled in will also depend on how things are done at your company.

Location, location, location

The Location box in a meeting request.

If your company uses Microsoft Exchange Server for its e-mail server, you *may* set up the location for your meeting by inviting the meeting room to your meeting—just as you would invite any other participant.

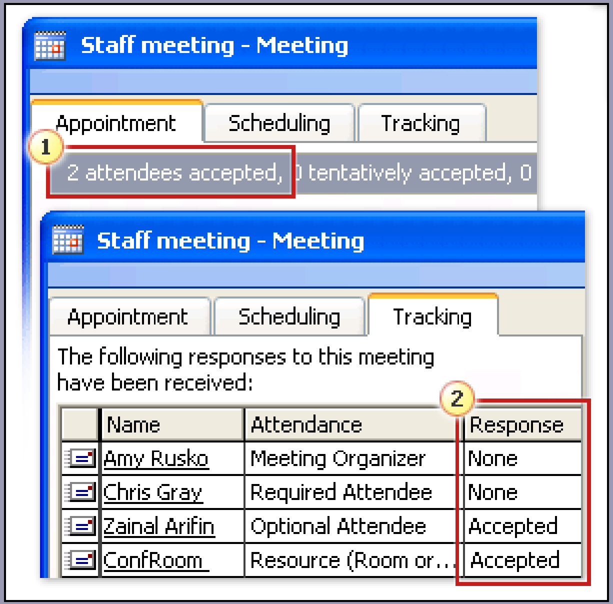
You do this by specifying that the invited room is a **resource**.

Location, location, location

The Location box in a meeting request.

If your company doesn't use Microsoft Exchange Server to handle conference room scheduling, you can specify a location for your meeting by typing the location of the meeting into the **Location** box of the meeting request.

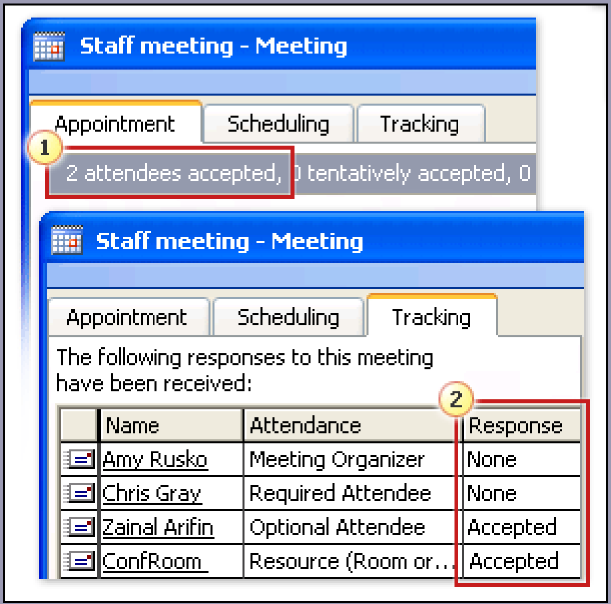
Send the meeting request, track responses



The Location box in a meeting request

Once you've set up the meeting in your own Calendar, click **Send** to send the meeting request to the participants.

Send the meeting request, track responses

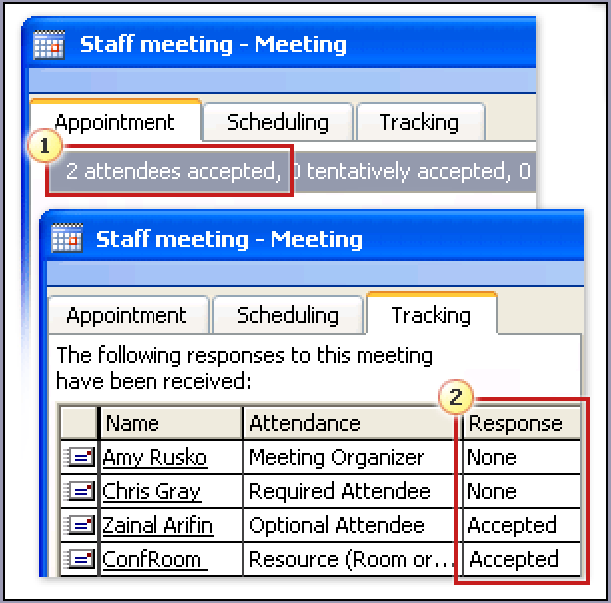


The Location box in a meeting request.

Once you've sent your request and started receiving responses, you can see how many people plan to attend by looking at the Infobar at the top of the meeting request in your Calendar (you need to open the request to see this).

You can get more details by looking at the **Tracking** tab for the meeting item in your Calendar.

Send the meeting request, track responses



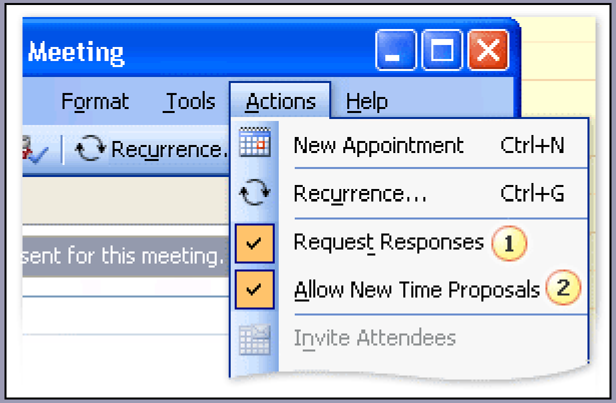
The Location box in a meeting request.

See the image at left. You can track the responses using these tabs.

1. Use the Infobar on the **Appointment** tab.

2. Look in the Response column on the **Tracking** tab.

Send the meeting request, track responses

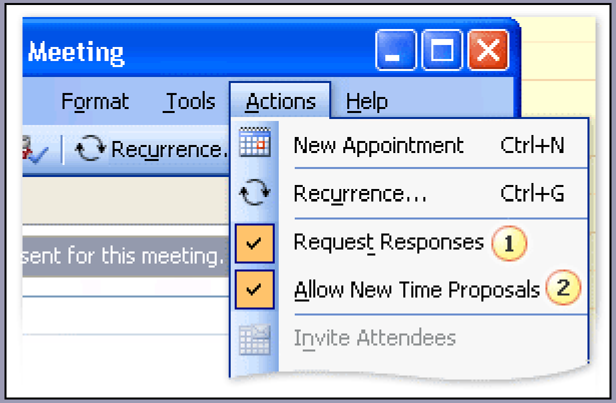


Request Reponses and Allow New Time Proposals commands

See the image at left. Use these commands to control responses meeting-by-meeting. You'll see these commands on the **Actions** menu when the meeting is open for editing.

1. See responses.
2. Allow others to propose new meeting times.

Send the meeting request, track responses

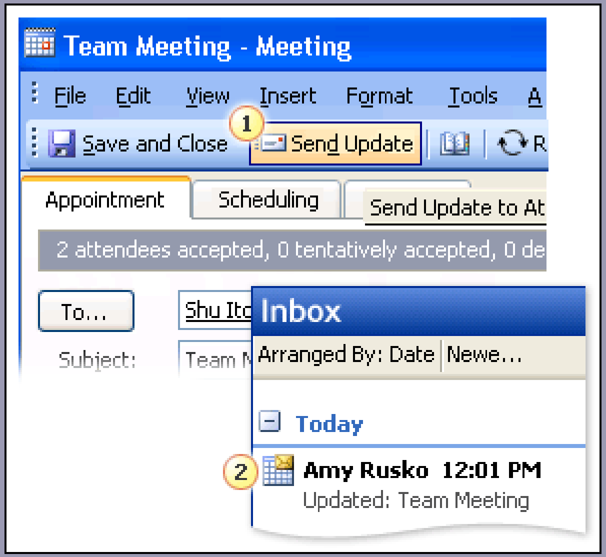


Request Reponses and Allow New Time Proposals commands

The following options give you some control over your meeting request:

- **Ignore responses**: You can choose not to track the attendees' responses.
- **Allow new time proposals**: Since you're in charge of the meeting, you decide whether to allow attendees to suggest new times for your meeting.

Wrong time, place, or person? Change it!

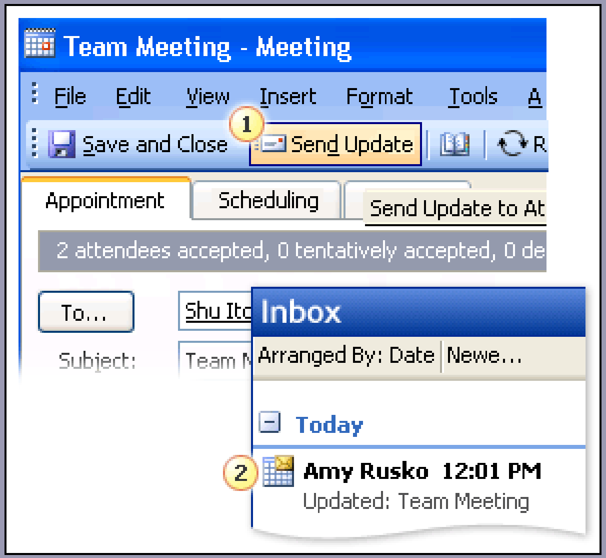


Send Update button

You can change any aspect of the meeting any time after the meeting request has been sent:

- First, make your changes in the meeting request in your Calendar.
- Then, send an update to the people who need to know about the change by clicking the **Send Update** button.

Wrong time, place, or person? Change it!

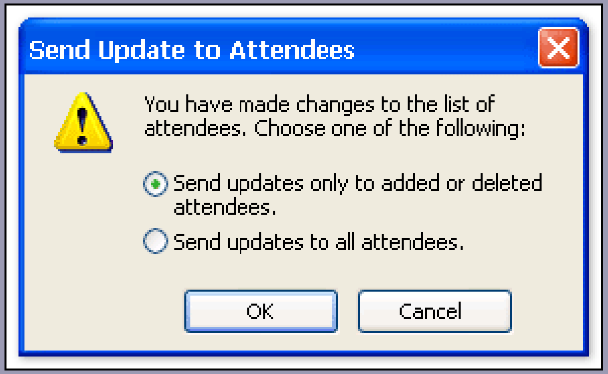


Send Update button

Here is the process to update a meeting.

1. After you make a change to the meeting request, click **Send Update**.
2. An updated meeting request is sent to attendees.

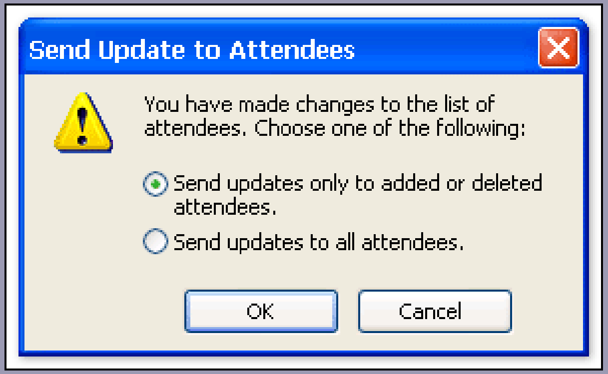
Wrong time, place, or person? Change it!



Send Update to Attendees dialogue box

See the picture to the left. If you add or remove attendees, you can choose whether to send an update to everyone or only to those attendees who will be affected by the change.

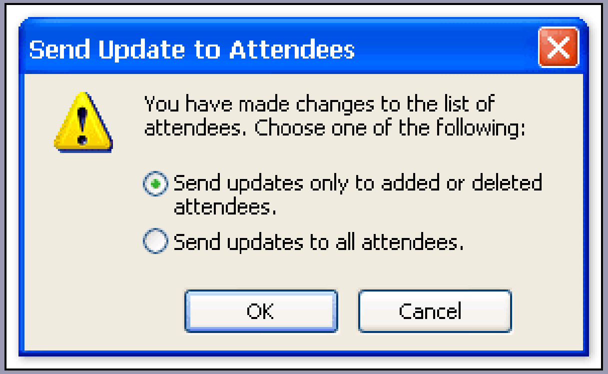
Wrong time, place, or person? Change it!



Send Update to Attendees dialogue box

Send updates to all attendees: If you've changed something substantial, like the time or location of the meeting, everyone needs to know.

Wrong time, place, or person? Change it!



Send Update to Attendees dialogue box

Send updates only to some attendees: If you made changes to the attendee list only—for example, if you added one person to the meeting—there's no need to send the whole group an update.

Suggestions for practice

1. Open the practice file.
2. Open the sample meeting.
3. Look at attendees and scheduling.
4. Look at the Tracking tab.

(Continued on next slide.)

Suggestions for practice, cont'd.

5. Make changes to a meeting and send an update.
6. Remove an attendee.
7. Cancel the meeting.
8. See how to always prohibit counterproposals.

Online practice (requires Outlook 2003)

Test 2, question 1

What is a quick way to know how many participants will be attending a large meeting?
(Pick one answer.)

1. Look at the Tracking tab and count the attendees.
2. Open the meeting in your Calendar and look at the Infobar.
3. Look in your Inbox, sort the messages by subject, and count the responses to your meeting request.

Test 2, question 1: Answer

Open the meeting in your Calendar and look at the Infobar.

If you're tallying responses, the Infobar is your quickest way to see how many people are coming.

Test 2, question 2

On the Scheduling tab of a meeting request, you can check ______ if your company is using Microsoft Exchange Server for its e-mail. (Pick one answer.)

1. Whether an attendee is coming.
2. Whether an attendee is free or busy.
3. Whether the attendees can suggest alternate times.

Test 2, question 2: Answer

Whether an attendee is free or busy.

For each attendee that's using Microsoft Exchange Server, you can check free/busy time by looking at the Tracking tab. You'll see different coloured horizontal bars indicating that the attendee is Busy, Tentative, or Out of Office. If, instead, you always see a white band with slashes, meaning No Information, chances are that someone (you or the attendee) is not using Microsoft Exchange Server.

Test 2, question 3

You can reassign ownership of a meeting once it has been set up. (Pick one answer.)

1. True.

2. False.

Test 2, question 3: Answer

False.

Once a meeting has been set up by an organiser, that organiser is the only person who can own the meeting. To assign a new organiser, that person would need to create a new meeting.

Test 2, question 4

The only detail about a meeting you've changed is the attendee list. You've added one person, "Chris Gray." What's the best update method to let only Chris know of the change? (Pick one answer.)

1. When prompted, select the **Send updates only to added or deleted attendees** option.

2. When prompted, select the **Send update to all attendees** option.

3. There isn't a way to update only Chris.

Test 2, question 4: Answer

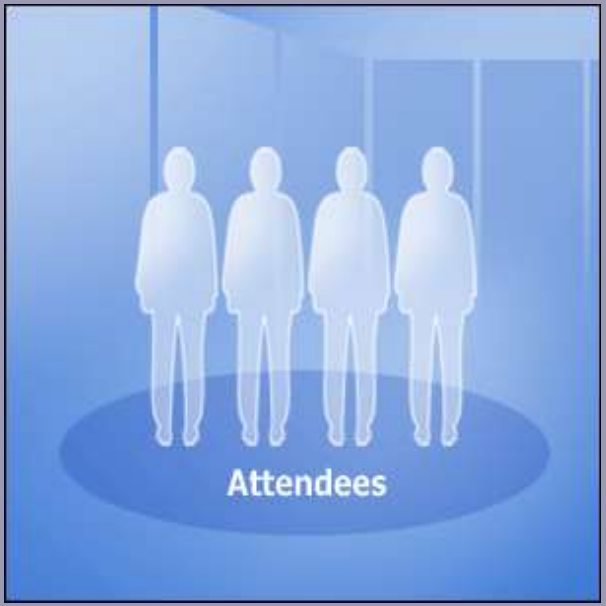
When prompted, select the **Send updates only to added or deleted attendees** option.

Use this option, and you'll avoid cluttering the Inboxes of everyone else. You'll send one update to the person who really needs to know...and that's Chris, the person you added.

Lesson 3

When you receive a meeting request

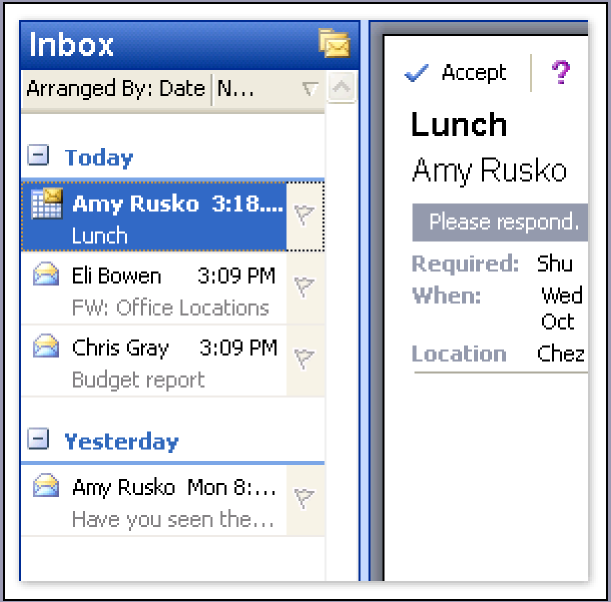
When you receive a meeting request



When a meeting request lands in your Inbox, it is automatically added to your Calendar. This reduces the potential for double-bookings and helps you to avoid missing meetings.

You still need to **reply** to the meeting organiser, however, confirming your attendance.

How to respond

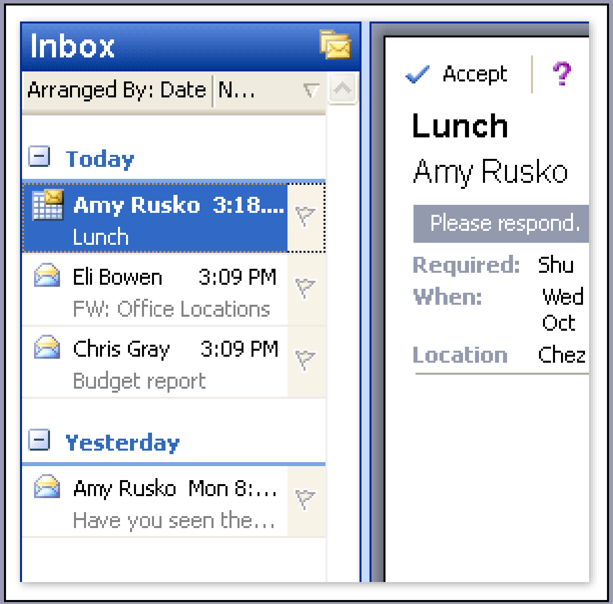


A meeting request in the Inbox

So the request lands in your Inbox, and the meeting time is blocked out tentatively in your Calendar.

Now, it's up to you to respond to the organiser's request.

How to respond



A meeting request in the Inbox

Your main choices for responses are:

- Accept
- Decline
- Tentative

How to respond

The Accept button in a message box

After you click one of the buttons to respond to a meeting request, you are given three options for your response:

- Include a message with your response
- Send the response right away
- Do not send a response at all

How to respond

The Accept button in a message box

Include a message with your response.

Do you need to let the meeting organiser know that you might be late? Maybe you need to verify if lunch will be provided at a lunchtime meeting or whether you need to bring anything to a client presentation. When you respond to a meeting request, you can send a personal note to the organiser.

How to respond

The Accept button in a message box

Send the response right away.

The meeting response is sent back to the organiser's Inbox, and the meeting entry is updated in the Calendar.

How to respond

The Accept button in a message box

Do not send a response at all.

The meeting response is sent back to the organiser's Inbox, and the meeting entry is updated in the Calendar.

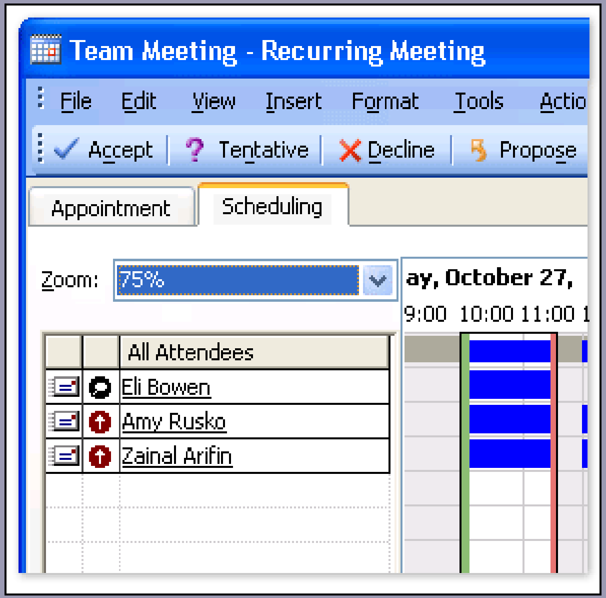
How to respond

The Accept button in a message box

See the image to the left. To include a message with your response:

1. Respond to the meeting request.
2. Select **Edit the response before sending**, and click **OK**.
3. Write your message in the response before sending it to the meeting organiser.

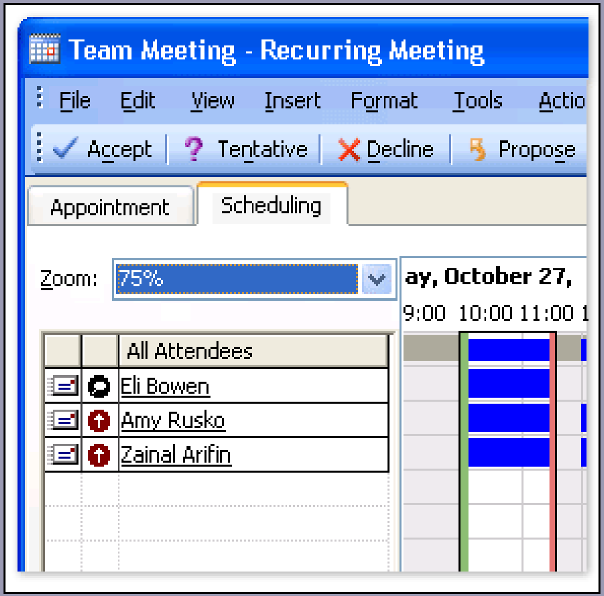
See who else is coming



The Scheduling tab of a meeting request

Want to know who else is invited? It may be considered rude to ask, but with Outlook you can look for yourself and no one will be the wiser.

See who else is coming

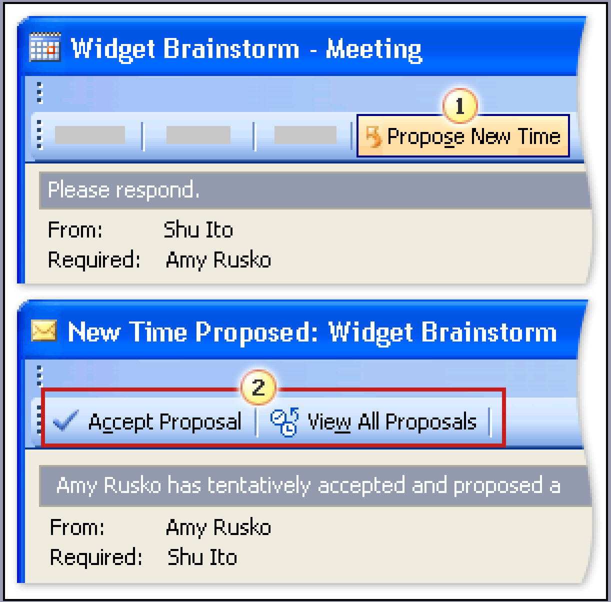


The Scheduling tab of a meeting request

You can use the **Scheduling** tab to see who else is coming to the meeting:

- Open the meeting request.
- Click the **Scheduling** tab.
- You'll see a list of all of the other people who were invited to the meeting.

Want to meet at a different time?

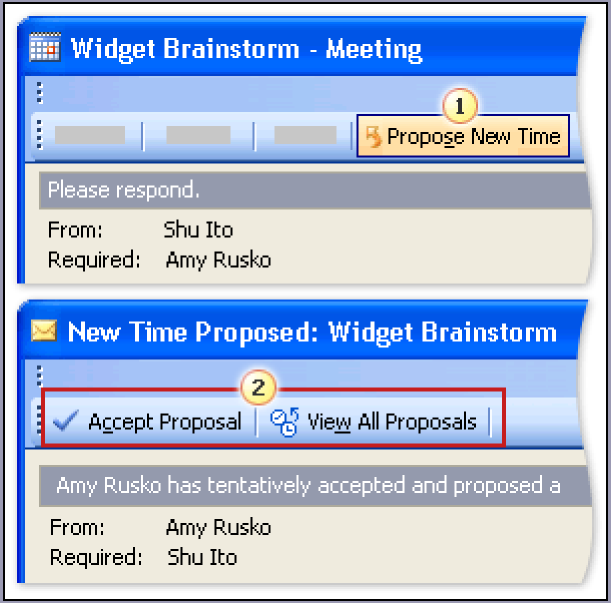


Propose New Time button

You can propose a different time for the meeting by using the **Propose New Time** button .

When you do this, the meeting organiser receives your request. But, as with all things about the meeting, the organiser gets to make the final decision about the new meeting time.

Want to meet at a different time?



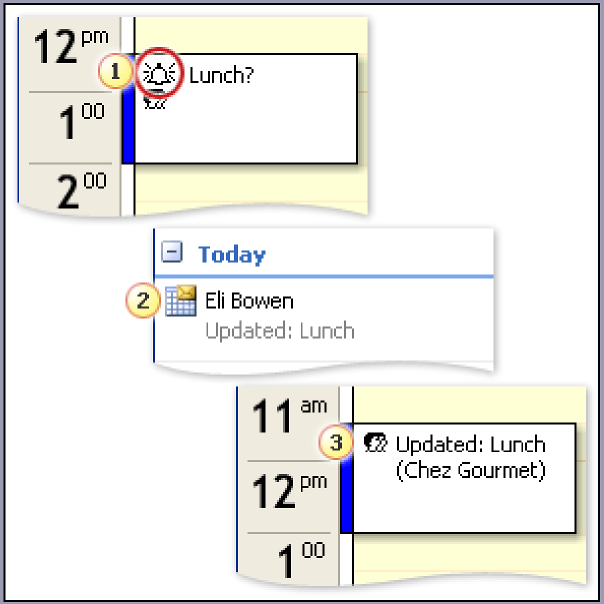
Propose New Time button

To propose a new meeting time:

1. Click **Propose New Time** to suggest a new meeting time.

2. The meeting organiser can choose whether to accept the proposal. The organiser can also view all proposals at once.

It's in your calendar, but you don't own it

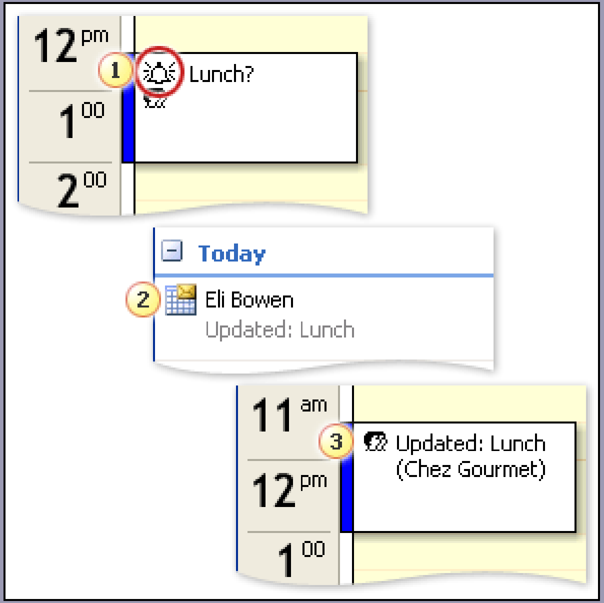


Meeting in Calendar with reminder from attendee

Once you've accepted (or tentatively accepted) a meeting request, you'll have the ability to open and modify it in your own Calendar—but you shouldn't.

Remember, you don't own the meeting, so it's not really yours to change.

It's in your calendar, but you don’t own it



Meeting in Calendar with reminder from attendee

See the image to the left.

1. An appointment in the Calendar with a reminder that was set by the attendee, not the meeting organiser.
2. The meeting organiser sends an update.
3. The reminder is overwritten.

Use caution when forwarding

Forward command on **Actions** menu

Does someone else need to know about this meeting? It's possible to forward a meeting request to someone else.

When you forward a meeting request, if that person responds to it, the meeting organiser will receive a message *directly* from that person—you'll be out of the loop.

Use caution when forwarding

Forward command on **Actions** menu

Will the forwarded request be an unpleasant surprise to the organiser?

Before you forward a meeting request, think about whether the meeting organiser will be inconvenienced by your actions.

Use caution when forwarding

Forward command on **Actions** menu

For example, think about these factors:

- Are there space limitations for the meeting location?
- Is there a cost associated with the meeting? (Is the organiser providing expensive handouts or lunch?)
- Is the subject matter of the meeting likely to be controversial or confidential?

Suggestions for practice

1. Open the practice file.
2. Accept a meeting request.
3. Tentatively accept a meeting.
4. Change time to display as free.

(Continued on next slide.)

Suggestions for practice, cont'd.

5. Propose a new time.
6. Clean up and close the practice file:
   - Close the practice data file.
   - Delete "Undeliverable" e-mail messages.

Online practice (requires Outlook 2003)

Test 3, question 1

If you modify your copy of a meeting request (for example, by adding important notes about items that you want to talk about at the meeting), what's the danger? (Pick one answer.)

1. You'll lose the changes if the meeting organiser updates the meeting.
2. Other people will be able to see your notes because the meeting request includes other attendees besides yourself.
3. Modifying the request will cause you to become the meeting organiser, and you'll be the new owner of the meeting.

Test 3, question 1: Answer

You'll lose the changes if the meeting organiser updates the meeting.

There's always a risk of losing changes you make to a meeting you don't own.

Test 3, question 2

You aren't interested in the meeting and you don't want to receive updates. How should you respond? (Pick one answer.)

1. Tentative.
2. Just decline.
3. Decline, and ask to be removed from the attendee list.

Test 3, question 2: Answer

Decline, and ask to be removed from the attendee list.

If you're truly not interested, you'll need to have the meeting organiser remove you from the attendee list. This could be the perfect opportunity to use the Edit the response before sending option when you send your response.

Test 3, question 3

A meeting appears in your Calendar with a free/busy status of Tentative. You haven't yet responded to the request, but since you want to be tentative about the meeting, there's no need to do anything more. (Pick one answer.)

1. True.

2. False.

Test 3, question 3: Answer

False.

Some action is required on your part so that the meeting organiser knows your intentions. If you do nothing, the organiser sees your status as No Response. To let the organiser know you're tentative, you have to respond as such.

Test 3, question 4

The meeting organiser has contacted you because uninvited attendees are accepting meeting requests for a meeting (and there's not enough room for everyone). What's the likely cause?
(Pick one answer.)

1. The organiser may have forgotten to clear the Request Responses option.

2. Someone is forwarding the meeting requests to uninvited people.

3. The location wasn't specified.

Test 3, question 4: Answer

Someone is forwarding the meeting requests to uninvited people.

That's the most likely scenario. When a meeting request is forwarded, the forwardee can accept the meeting request just as if that person had been invited by the organiser. If the meeting organiser is trying to keep the number of participants to a certain size or limit it to a certain group of people, forwarding can be problematic.