

NCI Technologies presents:

Microsoft® Office Outlook® 2007 Training

Calendar basics

Course contents

- Overview: It's all about choices
- Lesson 1: Get it right in the calendar
- Lesson 2: Just beyond the basics

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

Overview: It's all about choices



In contrast to a paper calendar, Outlook 2007 offers many choices for how to keep track of your time.

For example, is the calendar entry a meeting or an appointment? Will it occur once or repeatedly? Should it be marked as busy, free, or tentative?

In this course you'll learn Outlook calendar essentials, find out how to efficiently book activities, and see how to stay on top of important dates with recurrence and reminders.

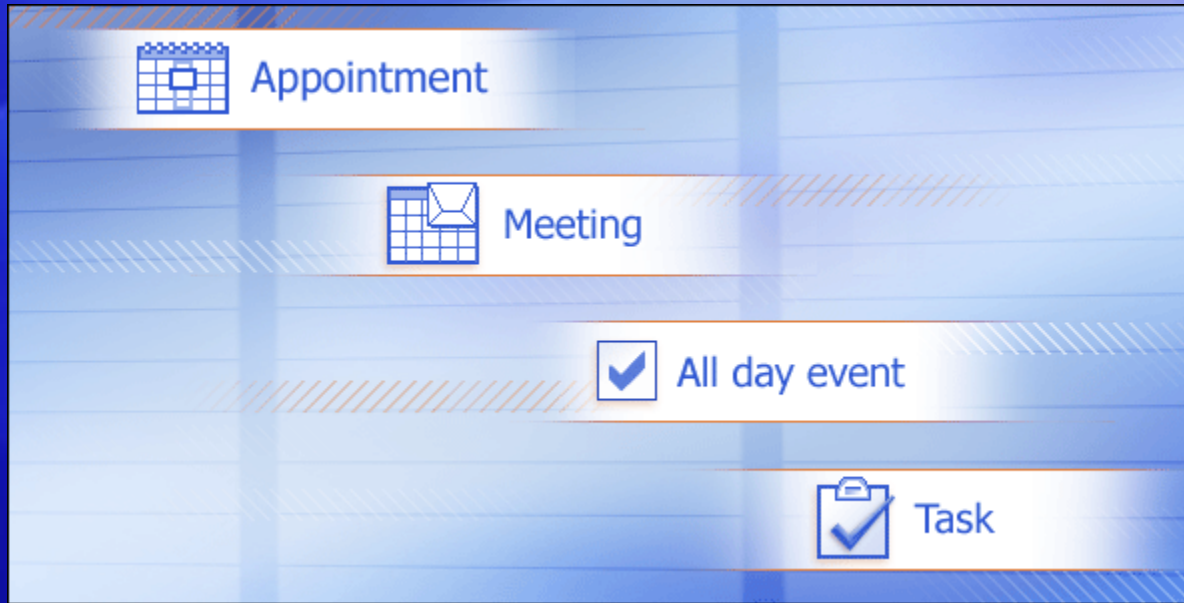
Course goals

- Use the right type of calendar entry for each occasion.
- Use reminders to remember activities.
- Use recurrence to quickly schedule activities that occur more than once.
- Use colours and free/busy time indicators to show calendar entries according to your needs.

Lesson 1

Get it right in the calendar

Get it right in the calendar

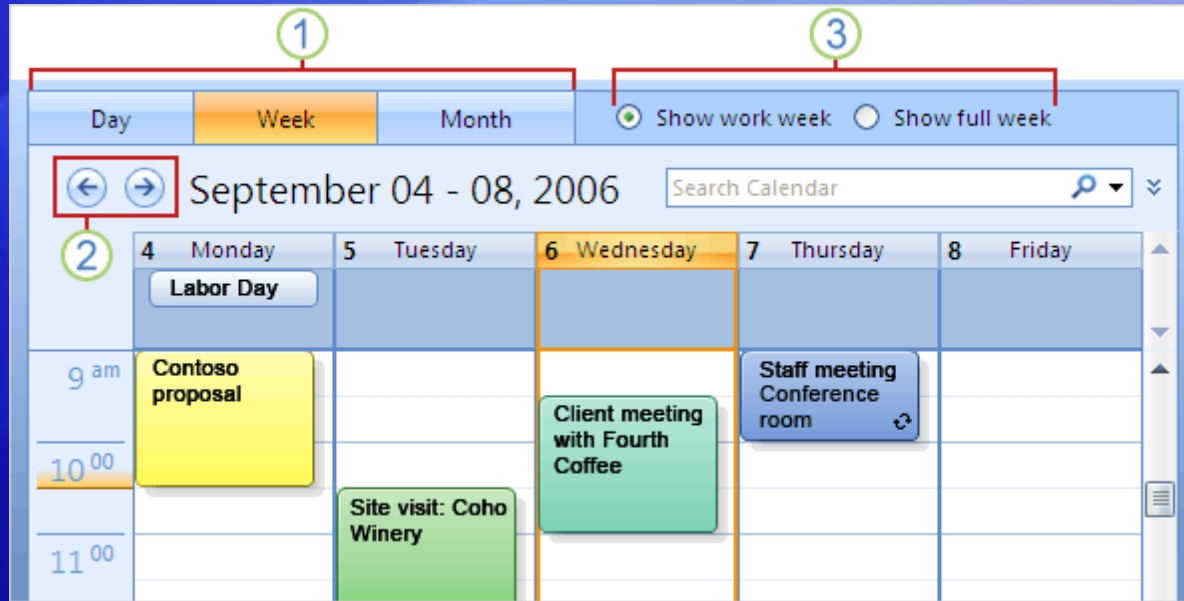


You have four different choices for how to schedule your Outlook calendar entries: **appointments, meetings, events, and tasks.**

Your choice of entry will depend on who else is involved and how you want the entry to appear.

By selecting entries in your calendar directly, you'll know at a glance what's going on, when, and with whom.

See your calendar

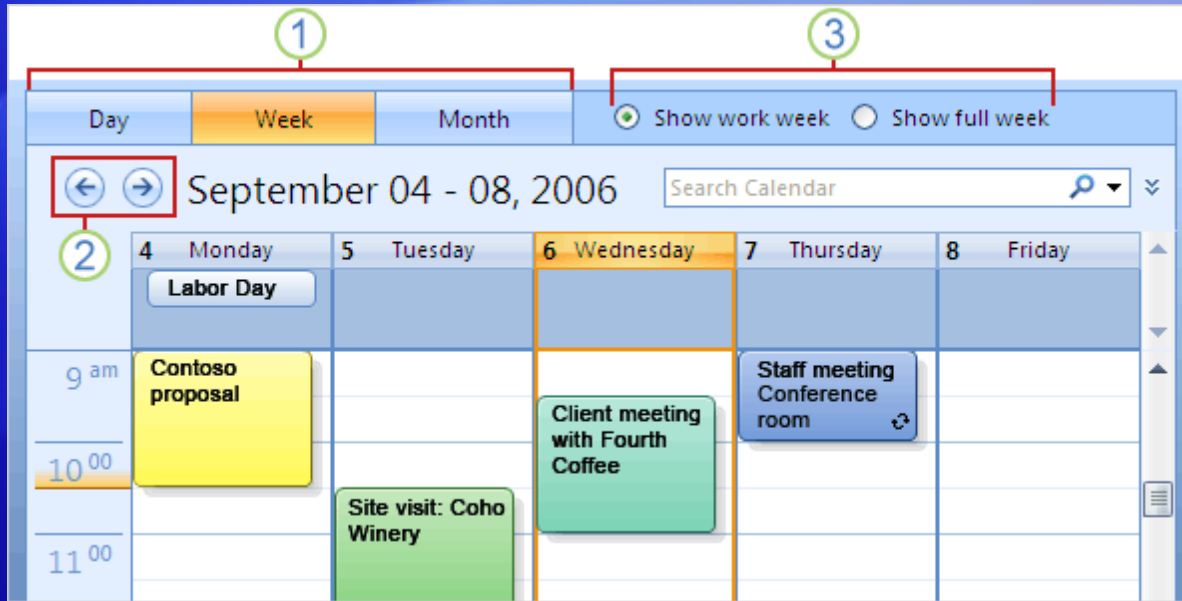


First things first. Before you can see what's on your calendar, you need to know how to find it.

There are two quick ways to see the calendar.

You can click **Calendar** in the **Navigation Pane**.

See your calendar

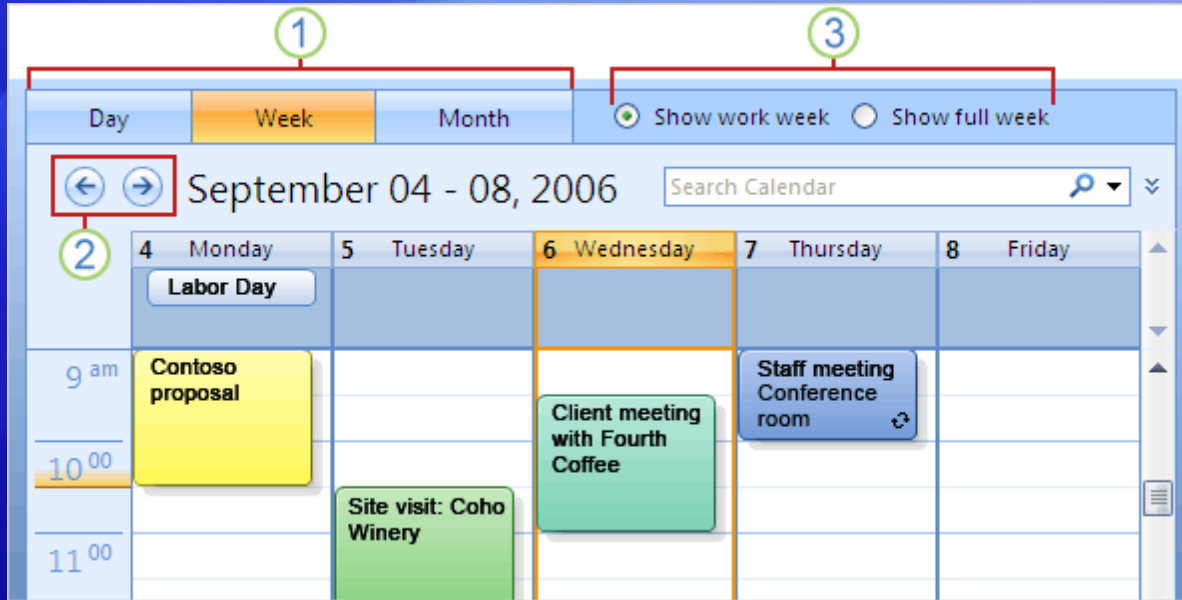


First things first. Before you can see what's on your calendar, you need to know how to find it.

Or you can click a date in the Date Navigator, which you'll find at the top of the **To-Do Bar**.

March						
S	M	T	W	T	F	S
26	27	28	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

See your calendar



Once you're looking at your calendar, you can use the buttons at the top of the window to show or hide detail.

The picture shows the options:

- ① You click **Day**, **Week**, or **Month** to quickly switch views.
- ② **Forward** and **Back** buttons allow you to easily move through your calendar.
- ③ More buttons let you show or hide days or detail, depending on your view.

Know your choices

The screenshot displays a calendar for Monday, August 8th. At the top, there is a header for 'Monday' and a 'Contoso Conference' entry marked with a circled '3'. Below this, a time slot from 8 am to 9:00 contains an 'Exercise' entry marked with a circled '1'. From 9:00 to 10:00, there is a 'Staff meeting' entry with details 'Conference Room 101' and 'Pia Lund', marked with a circled '2'. At the bottom, a 'Tasks' pane is visible, containing a table with columns for 'Show tasks on: Due Date', 'Start Date', and 'Due Date'. Two tasks are listed: 'Make photocopies for meeting' marked with a circled '4', and 'Pick up dry cleaning'. Both tasks have a start date of 'Mon 1/8/2007' and a due date of 'Mon 1/8/2007'.

Show tasks on: Due Date	Start Date	Due Date	
Make photocopies for meeting 4	Mon 1/8/2007	Mon 1/8/2007	<input type="checkbox"/>
Pick up dry cleaning	Mon 1/8/2007	Mon 1/8/2007	<input type="checkbox"/>

Now that you see your calendar, you can start scheduling.

Understanding the four different types of calendar entry will help you do this as effectively as possible.

- 1 **Appointment.** An appointment is an activity that involves only you, at a scheduled time.
- 2 **Meeting.** A meeting also occurs at a scheduled time. But you invite other people by using a meeting request that's sent via e-mail.

Know your choices

Monday

8

Contoso Conference (3)

8 am Exercise (1)

9⁰⁰ Staff meeting (2)
Conference Room 101
Pia Lund

10⁰⁰

Tasks

Show tasks on: Due Date	Start Date	Due Date	
Make photocopies for meeting (4)	Mon 1/8/2007	Mon 1/8/2007	<input type="checkbox"/>
Pick up dry cleaning	Mon 1/8/2007	Mon 1/8/2007	<input type="checkbox"/>

Now that you see your calendar, you can start scheduling.

Understanding the four different types of calendar entry will help you do this as effectively as possible.

- (3) **Event.** An event is an activity that lasts all day long. Unlike an appointment or meeting, an event doesn't block out time in your calendar. So you can still have other entries appear in your schedule for that day.

Know your choices

8 Monday

Contoso Conference (3)

8 am Exercise (1)

9 00 Staff meeting (2)
Conference Room 101
Pia Lund

10 00

Tasks

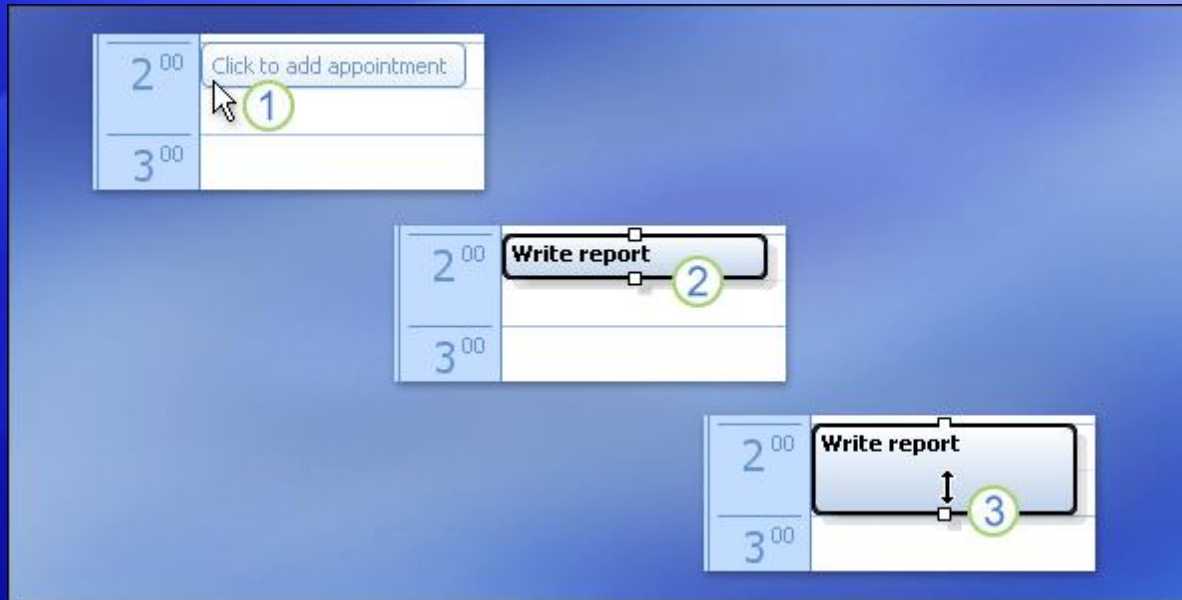
Show tasks on: Due Date	Start Date	Due Date	
Make photocopies for meeting (4)	Mon 1/8/2007	Mon 1/8/2007	<input type="checkbox"/>
Pick up dry cleaning	Mon 1/8/2007	Mon 1/8/2007	<input type="checkbox"/>

Now that you see your calendar, you can start scheduling.

Understanding the four different types of calendar entry will help you do this as effectively as possible.

- 4 **Task.** A task is an activity that involves only you, and that doesn't need a scheduled time. New to Outlook 2007 is an area in your calendar's Day and Week views that shows tasks.

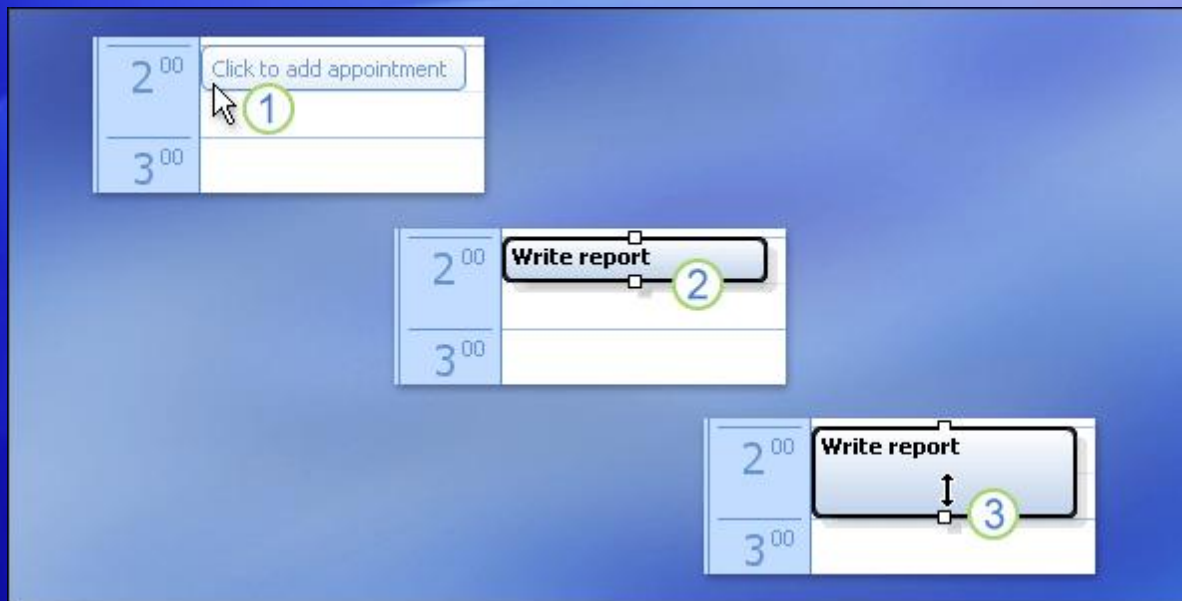
Just you? Use an appointment



Use an **appointment** when you know you'll be busy, but no one else is involved.

For example, you might want to block out time for research on a project, for writing a report, or for running an errand on the way home from work.

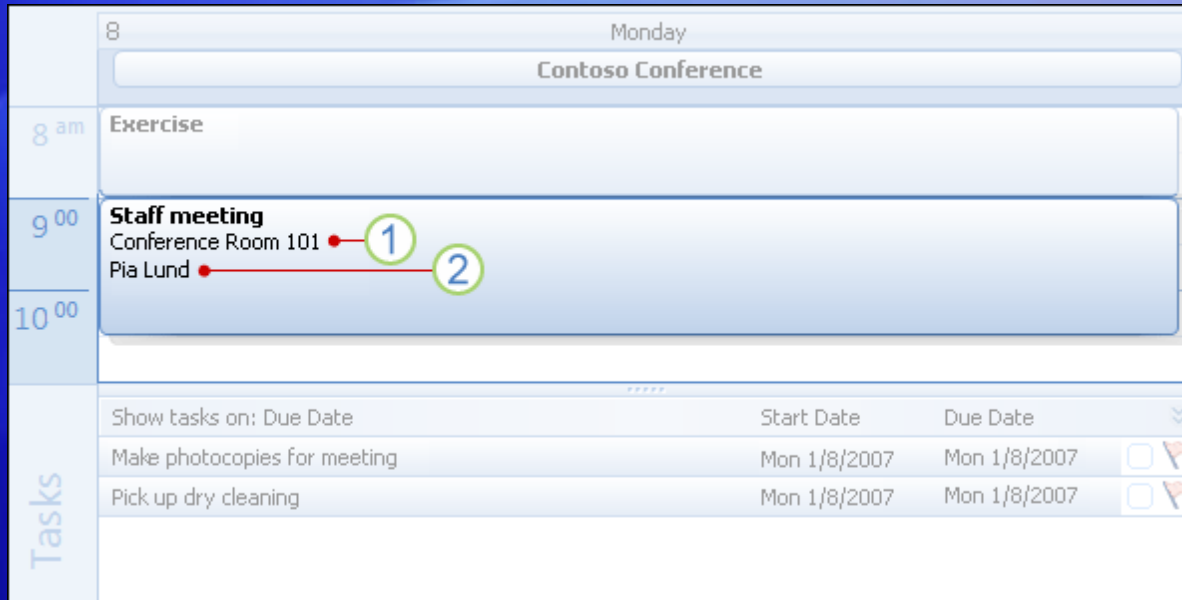
Just you? Use an appointment



The picture illustrates the steps.

- ① In Day view, rest the pointer over the desired time in your calendar, and click.
- ② Type the details.
- ③ If you need more time for your appointment, just drag the handle to make the appointment longer.

When others are involved, it's a meeting



The screenshot shows a calendar for Monday, 8:00 AM to 10:00 AM. A meeting titled "Staff meeting" is scheduled for 9:00 AM in Conference Room 101, with Pia Lund as the organizer. Two red lines with green circles labeled "1" and "2" indicate the meeting's duration and location. Below the calendar, a "Tasks" section lists two tasks: "Make photocopies for meeting" and "Pick up dry cleaning", both due on Mon 1/8/2007.

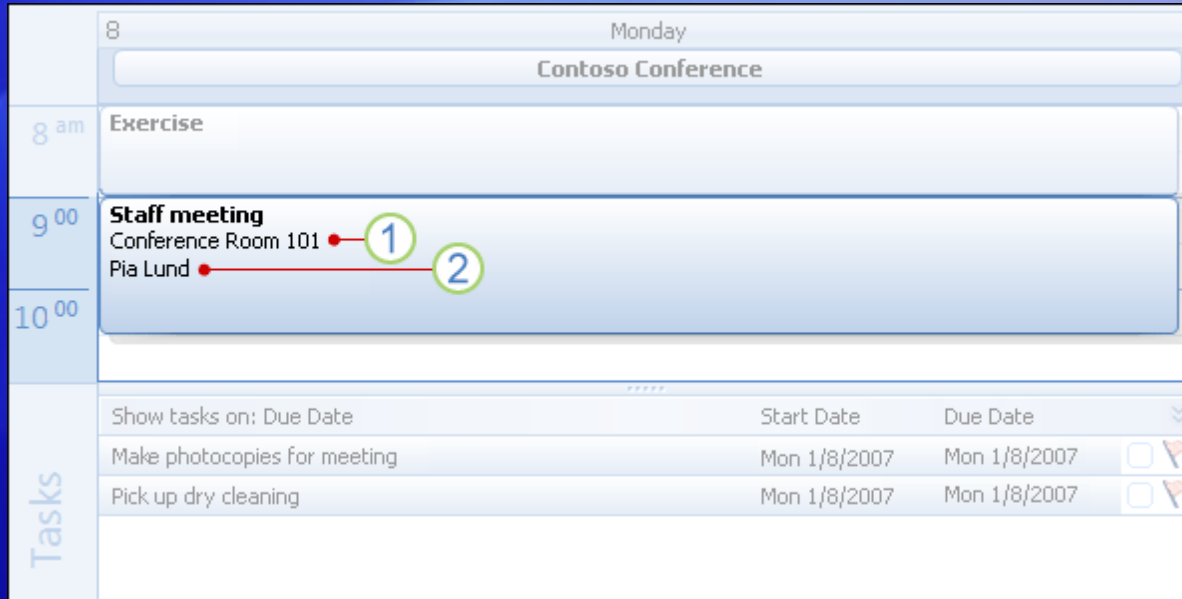
Show tasks on:	Due Date	Start Date	Due Date	
Make photocopies for meeting	Mon 1/8/2007	Mon 1/8/2007	Mon 1/8/2007	<input type="checkbox"/>
Pick up dry cleaning	Mon 1/8/2007	Mon 1/8/2007	Mon 1/8/2007	<input type="checkbox"/>

A **meeting** occurs at a scheduled time, and it includes other people and a meeting location.

A meeting in your calendar could be one you set up, or it could be one you've been invited to by someone else.

Meetings appear both in your calendar and in the calendars of the other people who are involved.

When others are involved, it's a meeting

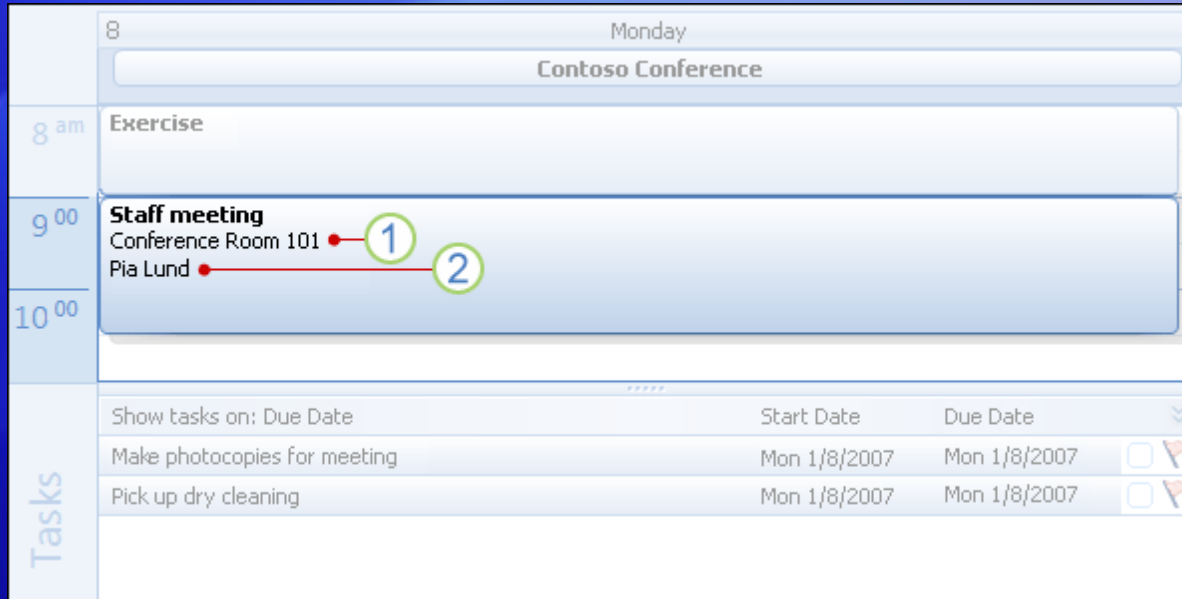


In your calendar, you can tell the difference between a meeting and an appointment by the information in the meeting entry.

In a meeting, you'll see the following:

- 1 The location of the meeting.
- 2 The organizer's name.

When others are involved, it's a meeting



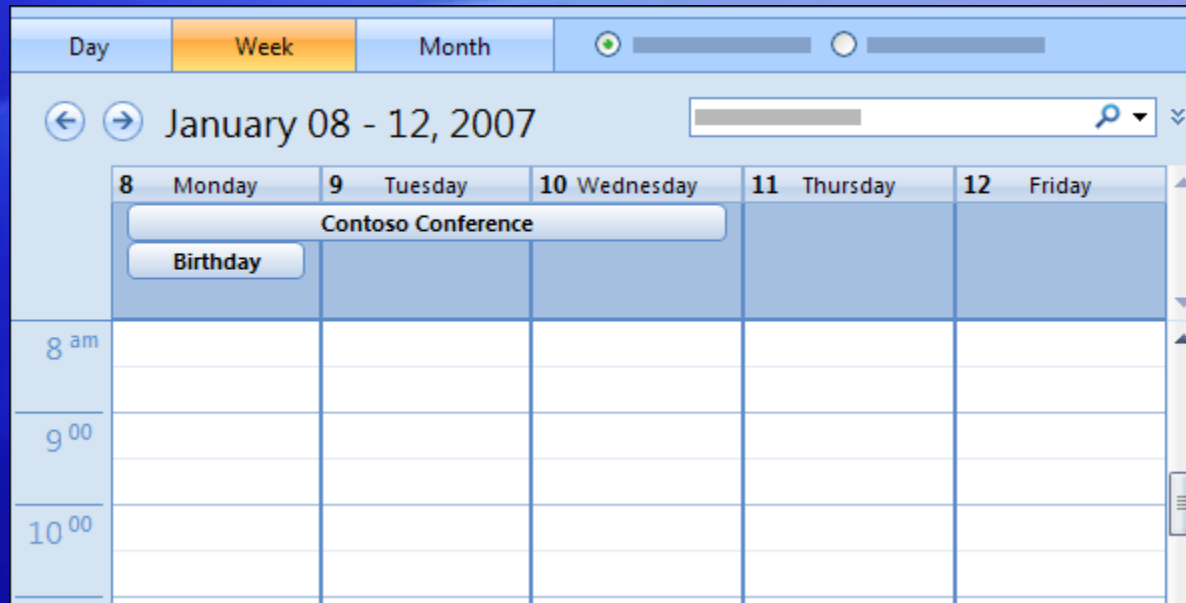
The screenshot shows an Outlook calendar for Monday, January 8, 2007. The calendar is titled "Contoso Conference". The time slots are 8 am, 9:00, and 10:00. A meeting entry titled "Staff meeting" is scheduled for 9:00 in Conference Room 101, with Pia Lund as a participant. Two red lines with circular callouts labeled "1" and "2" point to the meeting title and the participant name, respectively. Below the calendar is a "Tasks" pane with a table of tasks.

Show tasks on: Due Date	Start Date	Due Date	
Make photocopies for meeting	Mon 1/8/2007	Mon 1/8/2007	<input type="checkbox"/>
Pick up dry cleaning	Mon 1/8/2007	Mon 1/8/2007	<input type="checkbox"/>

In your calendar, you can tell the difference between a meeting and an appointment by the information in the meeting entry.

A meeting in Outlook is set up with the help of a **meeting request**, which is delivered to the meeting participants via e-mail.

Top the day with an event

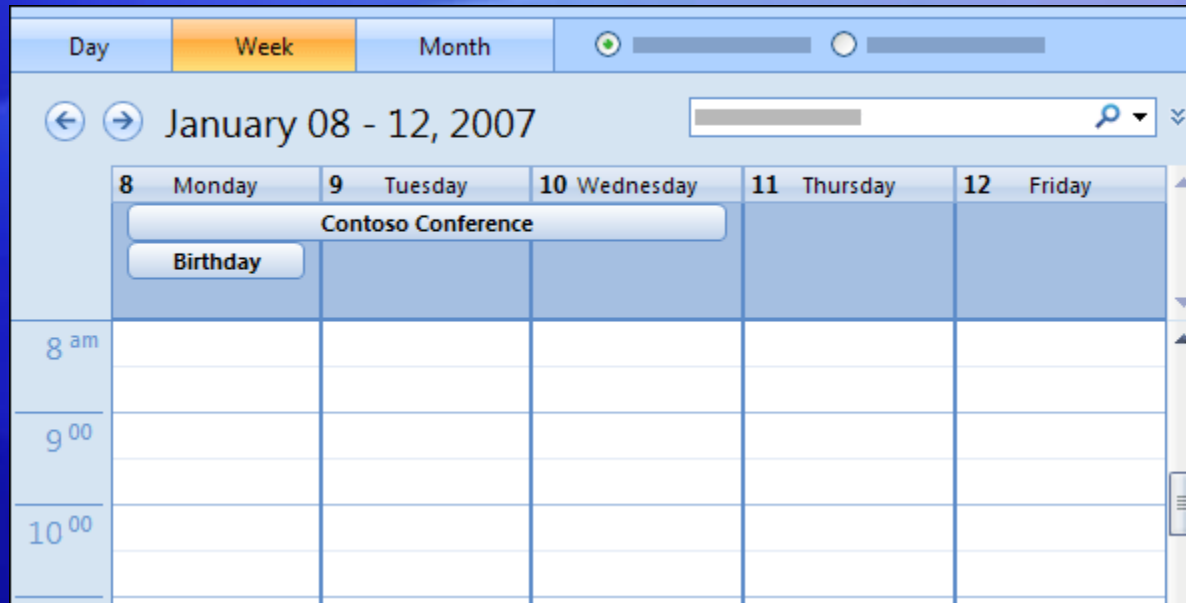


An **event** lets you note activities that last all day.

Events don't occupy scheduled time in your calendar; instead, they appear in banners at the top of the date you specify.

For example, in the picture the **Contoso Conference** is an event lasting three days, and the **Birthday** is an event lasting one day.

Top the day with an event



Use an event when you want to enter an activity on a specific day without having it clutter up all of that day's time slots in your calendar.

Here are some activities for which you might use an event:

- Conferences, business travel, or vacations, for one day or longer
- Birthdays and anniversaries
- Holidays

Keep track of your tasks

8 Monday
Contoso Conference

8 am Exercise

9⁰⁰ Staff meeting
Conference Room 101
Pia Lund

10⁰⁰

Tasks

Show tasks on: Due Date	Start Date	Due Date	
Make photocopies for meeting	Mon 1/8/2007	Mon 1/8/2007	<input checked="" type="checkbox"/>
Pick up dry cleaning	Mon 1/8/2007	Mon 1/8/2007	<input type="checkbox"/>

A **task** is an entry for any activity that you want to see on your calendar, but that doesn't need to be scheduled for a specific time or involve the whole day.

For example, if you have a number of errands to do, enter each errand as a task. (You'll see the Tasks area when you look at the calendar in Day or Week view.)

When you complete the task, check it off. A completed task sticks to the day on which it's completed, keeping a tidy list of the day's accomplishments at your fingertips.

Keep track of your tasks

8 Monday
Contoso Conference

8 am Exercise

9⁰⁰ Staff meeting
Conference Room 101
Pia Lund

10⁰⁰

Tasks

Show tasks on: Due Date	Start Date	Due Date	
Make photocopies for meeting	Mon 1/8/2007	Mon 1/8/2007	<input type="checkbox"/> ✓
Pick up dry cleaning	Mon 1/8/2007	Mon 1/8/2007	<input type="checkbox"/> 🗑️

You can enter a task with a scheduled start date and due date.

If you don't complete a task on its due date, it will automatically move forward and appear on the current day until you reschedule it or check it off.

Tip: To quickly reschedule a task, use the Week view and drag a task from one day to another.

Suggestions for practice

1. View your calendar.
2. Create an appointment.
3. Make a meeting.
4. Create an event.
5. Create a task.

Test 1, question 1

To switch to the calendar, you must quit and restart Outlook.
(Pick one answer.)

1. True.
2. False.

Test 1, question 1: Answer

False.

There are many ways to switch to your calendar. Restarting Outlook isn't one of them.

Test 1, question 2

Which of the following would best be entered as an event in your calendar? (Pick one answer.)

1. A party that occurs from 4:00 to 6:00 p.m.
2. A birthday.
3. A visit to the dentist.

Test 1, question 2: Answer

A birthday.

Your birthday or someone else's happens all day long, and that's what an event is for. The benefit of using an event is that you can show the event at the top of that day in the calendar. You're reminded about the event, and the time in your calendar is still available for you to schedule.

Test 1, question 3

Which type of calendar entry should you use if others at your workplace are involved? (Pick one answer.)

1. A meeting.
2. An appointment.
3. An event.

Test 1, question 3: Answer

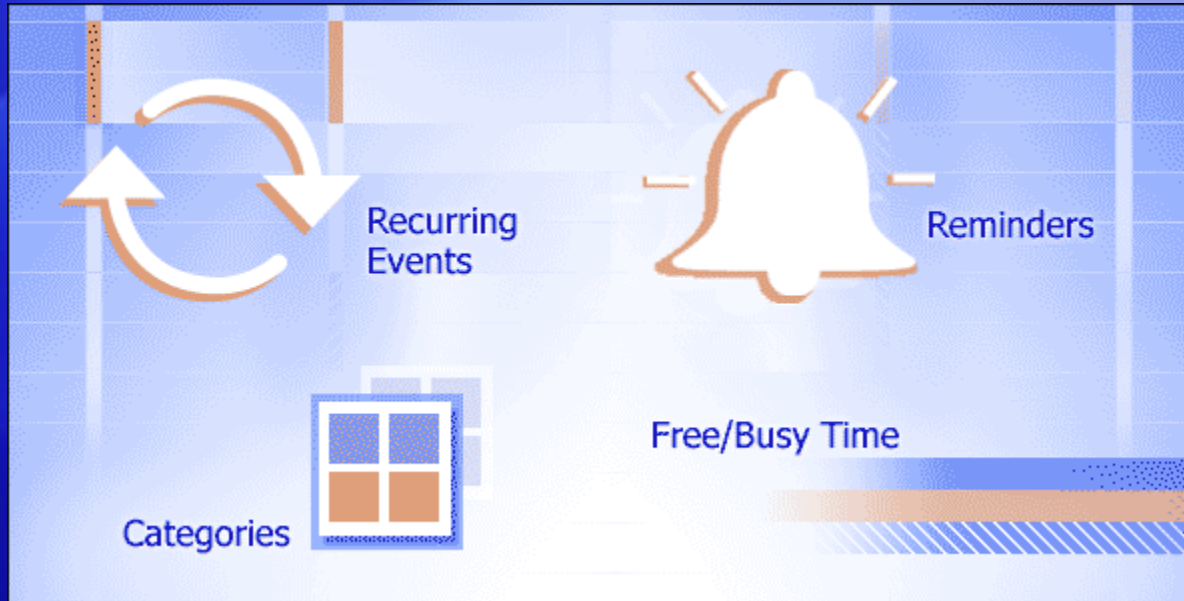
A meeting.

A meeting is what you use when others are involved.

Lesson 2

Just beyond the basics

Just beyond the basics

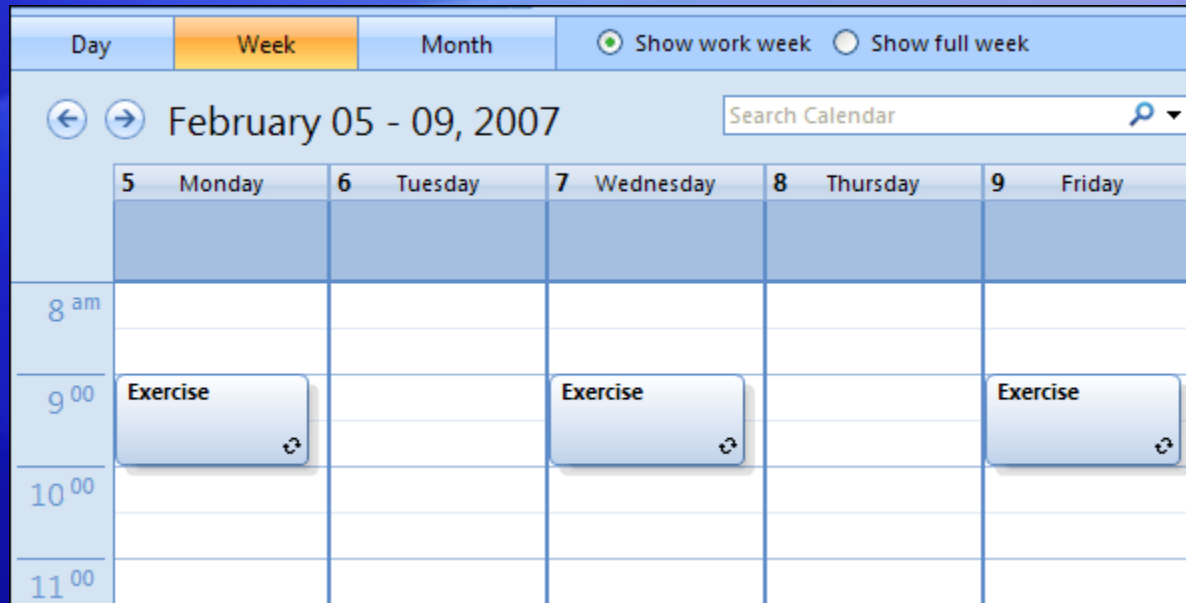


Writing one item in a paper calendar is a cinch. But what if something occurs on the first day of every month for the next year? You'd have to write down that same information 12 times.

Doesn't seem like a cinch any more. Maybe you'd rather enter it just once and let Outlook apply it all those other times. In this lesson, you'll learn how.


You'll also find out how your Outlook calendar can remind you of the time, help you do more in less time, and show your time to others.

Once is not enough: recurrence

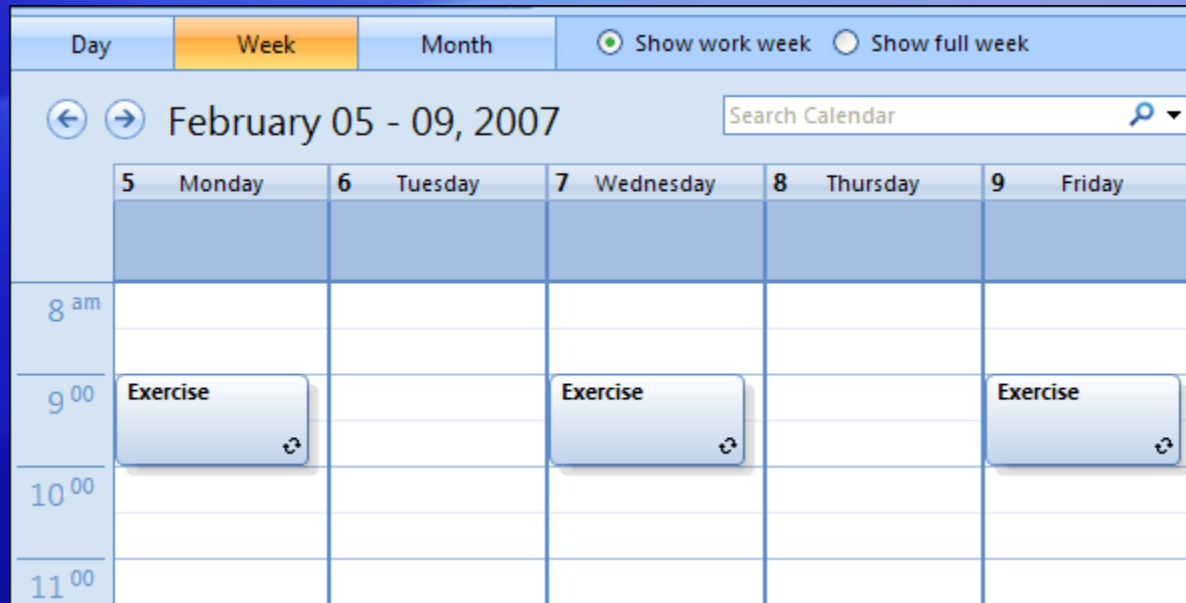


Something may happen again and again, but that doesn't mean you have to enter it again and again.

To tell Outlook that an appointment, meeting, or event occurs over and over, use the **Recurrence** feature. The frequency of the activity is called its **recurrence pattern**.

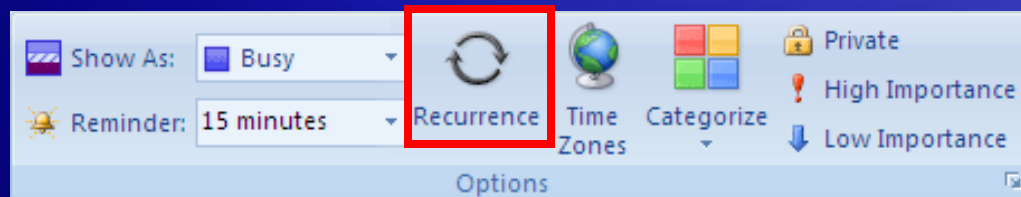
As you can see with the “Exercise” appointment in the picture, a recurring appointment appears repeatedly and displays a recurrence icon .

Once is not enough: recurrence

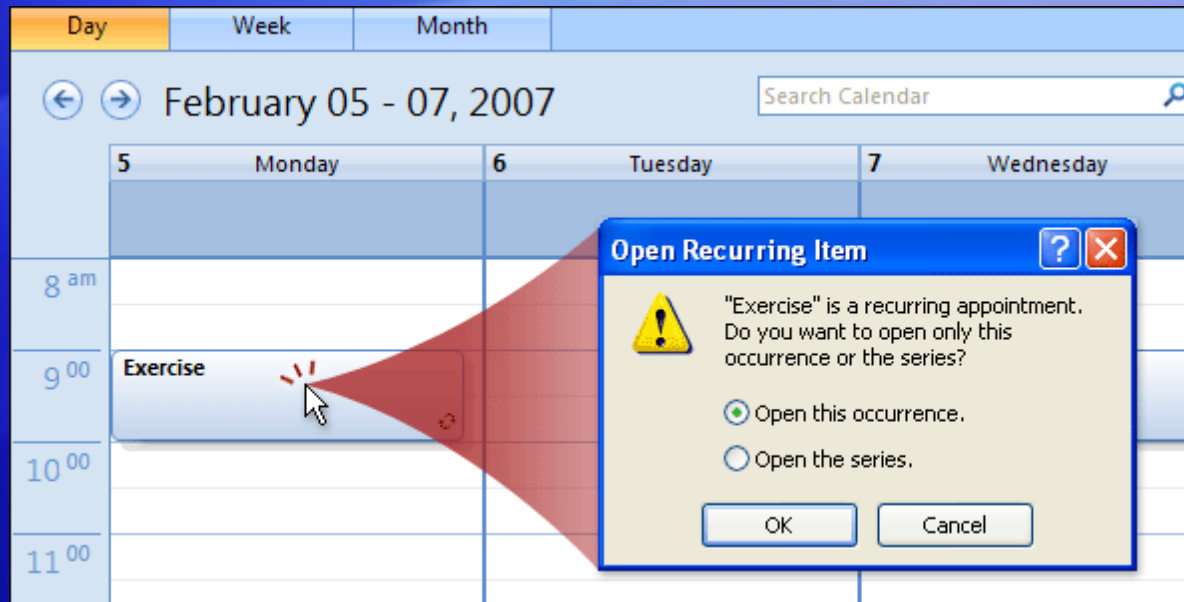


Something may happen again and again, but that doesn't mean you have to enter it again and again.

To set up a recurrence pattern, open the appointment and click the **Recurrence** button in the **Options** group on the **Appointment** tab.



Open a recurring entry

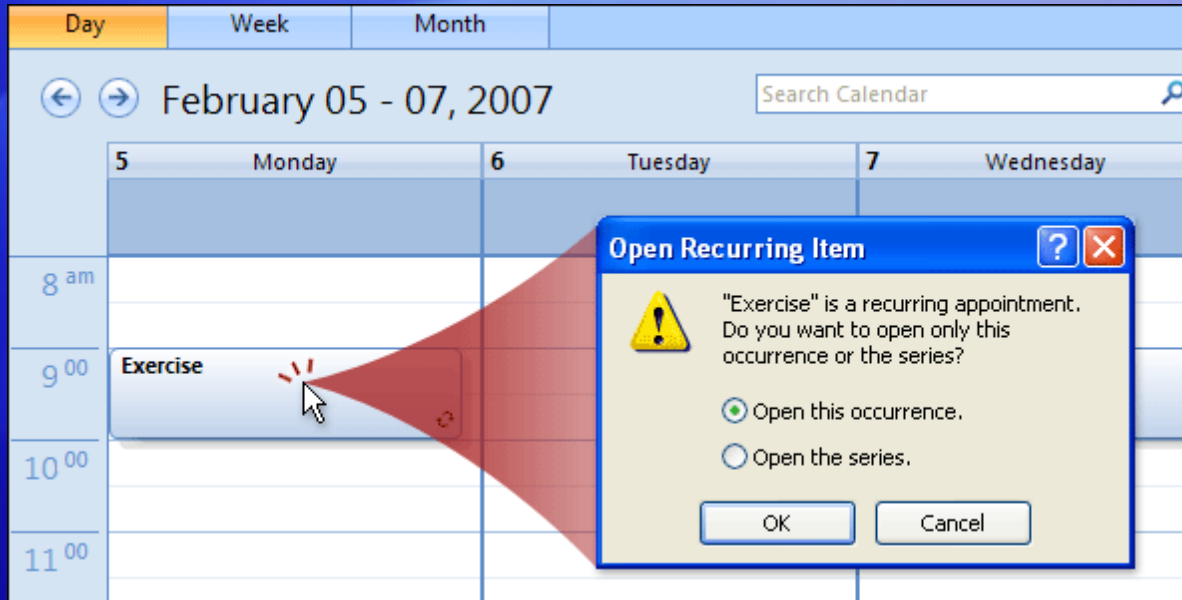


To open a recurring calendar entry to see its details or change it, start by double-clicking it.

A message appears like the one in the picture, giving you two options:

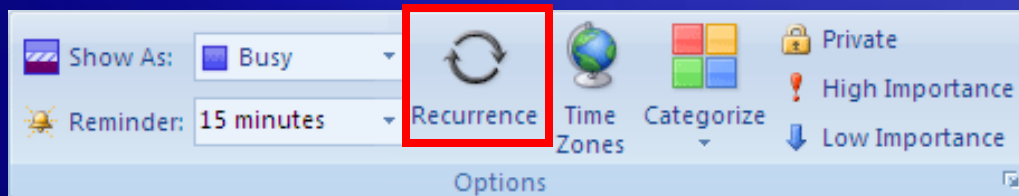
- **Open this occurrence.** Choose this when you want to see or change one instance, not the entire series.
- **Open the series.** Choose this when you want to see or change the entire series.

Open a recurring entry

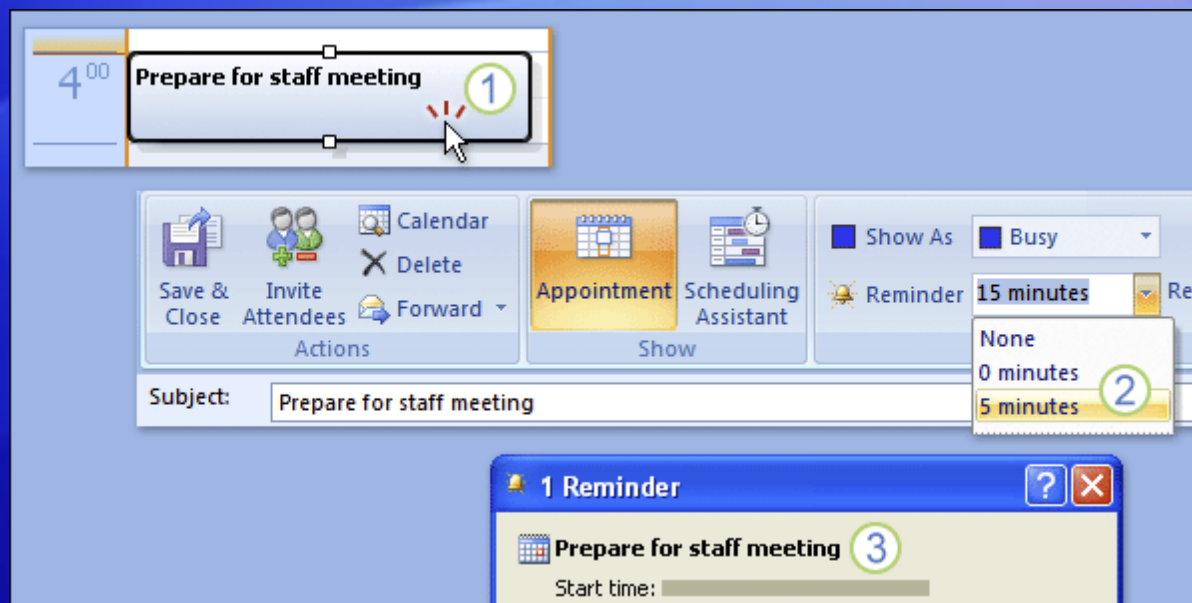


To open a recurring calendar entry to see its details or change it, start by double-clicking it.

After the series is open, change its recurrence pattern by clicking the **Recurrence** button on the **Appointment** tab.



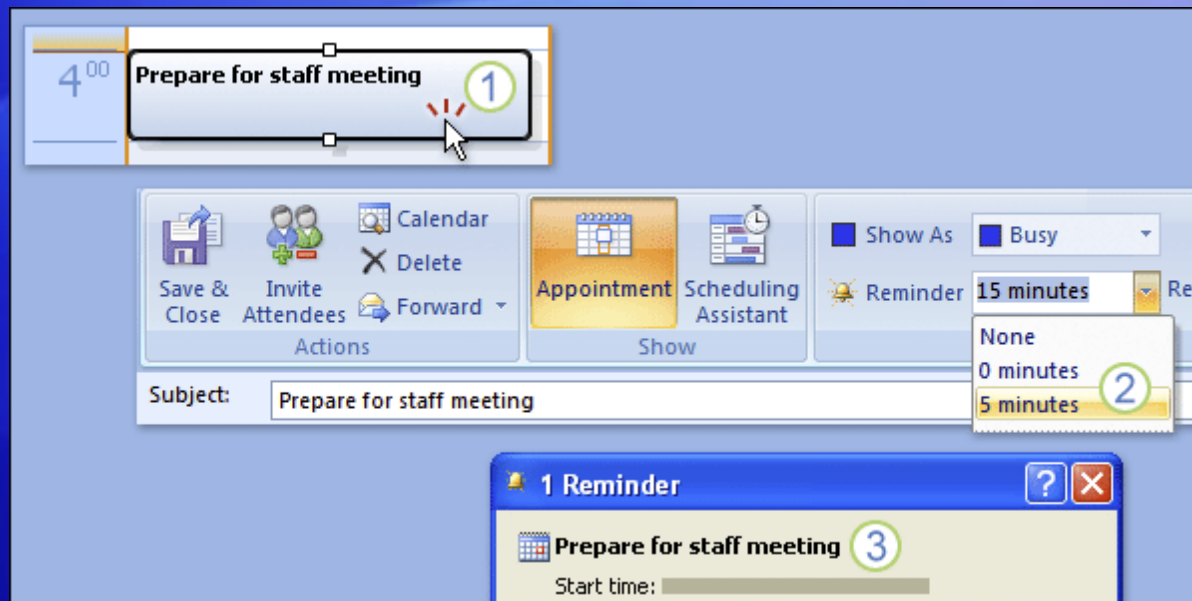
Remember with reminders



When you create any type of calendar entry, a reminder is set automatically.

By default, Outlook will notify you of appointments and meetings 15 minutes before they start.

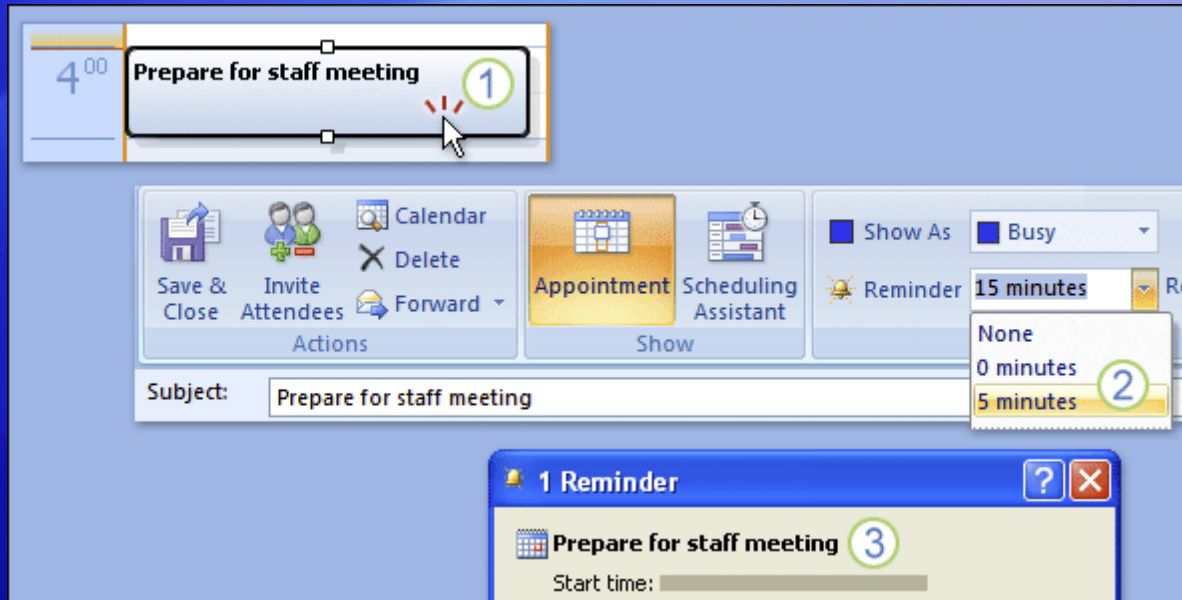
Remember with reminders



The picture shows the steps to change the reminder time for any calendar entry.

- ① Double-click the appointment to open it.
- ② In the **Reminder** box on the **Appointment** tab, choose the reminder time.
- ③ A reminder appears at the specified time.

Remember with reminders

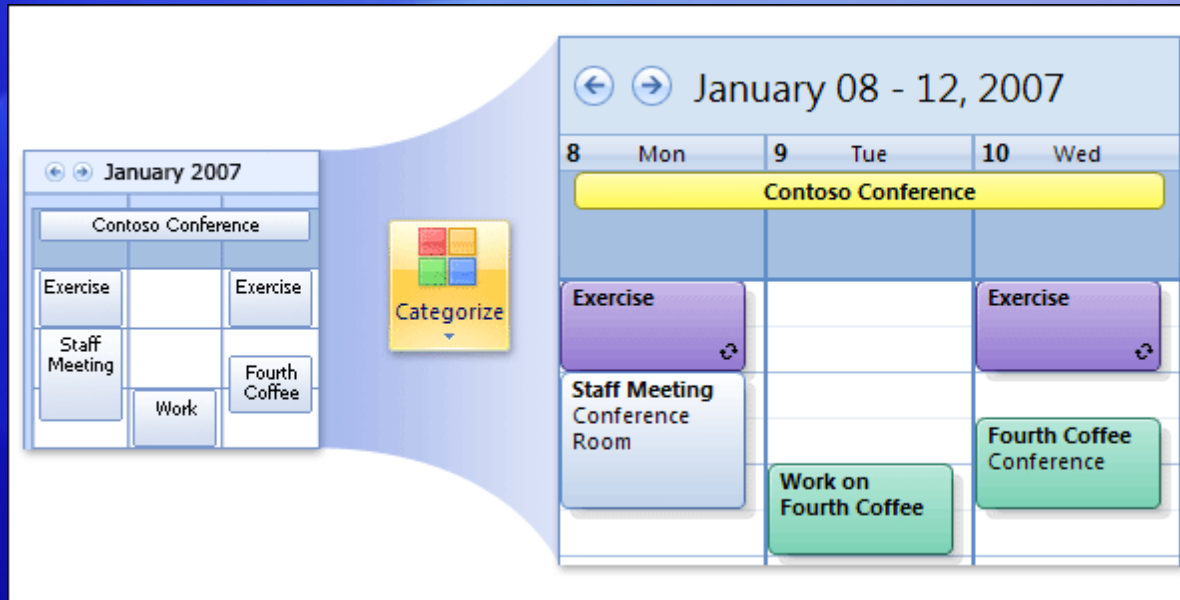


Wondering about reminders for events?

Outlook will notify you of events 18 hours before they start.

While you can't change this automatic setting, you can use the same steps shown in the picture to change reminders for events on an event-by-event basis.

Stay organized with colored categories



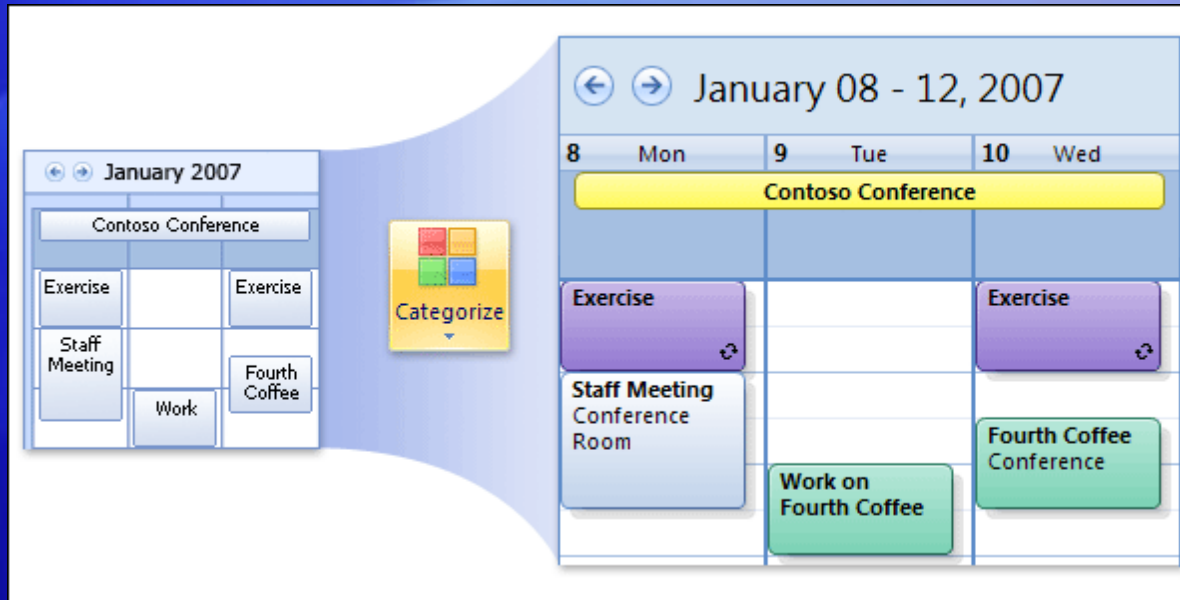
Want birthdays to catch your eye and personal appointments to stand out from business ones?

Outlook can make it happen.

Introducing...**colored categories!**

Colored categories let you name your colors (and change the names when you want to). Use colors to make certain entries stand out at a glance.

Stay organized with colored categories

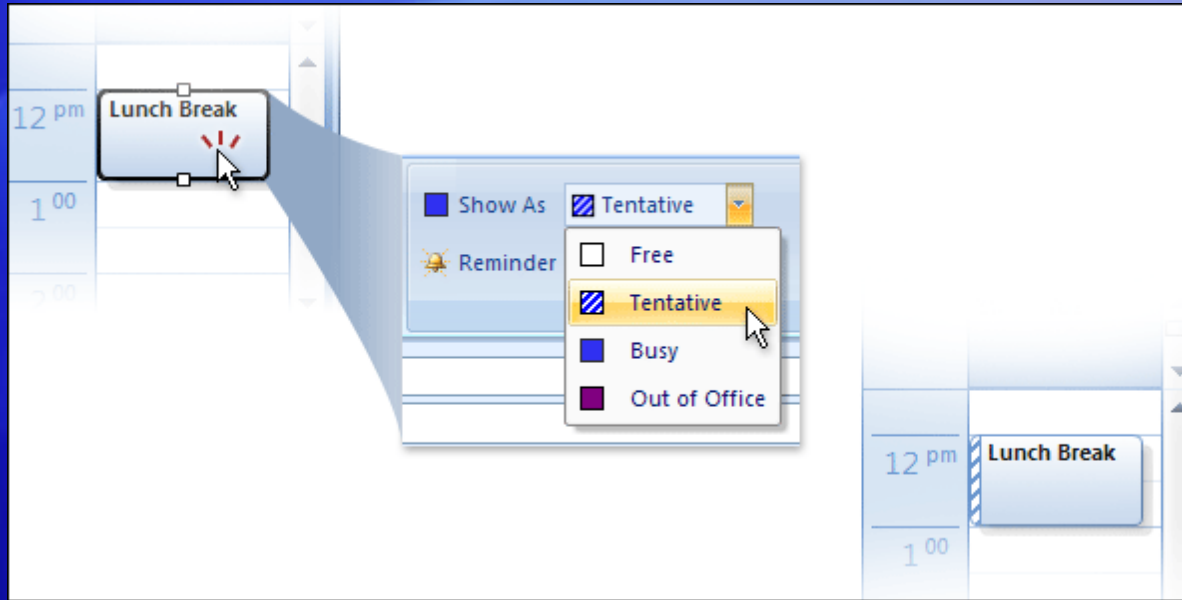


If you used labels in Outlook 2003 to colour-code your calendar entries, you may be wondering if you'll need to edit each calendar item individually to use the new system.

Happily, the answer is no.

When you upgrade to Outlook 2007, calendar labels will automatically be updated to coloured categories.

Is lunch time flexible? Show it.

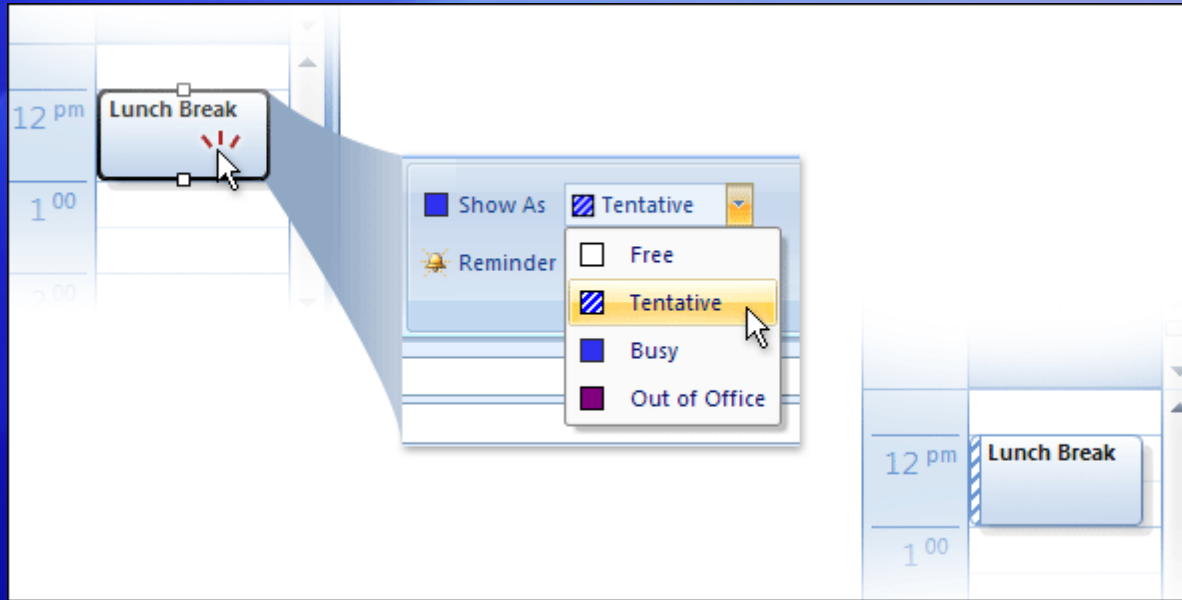


When you schedule a meeting, you want to choose a time when people can attend.

Outlook lets you and your colleagues tell each other who's busy, who's out of the office, who's free, and when.

A calendar entry's border colour indicates whether that time is scheduled as free, busy, tentative, or out of office.

Is lunch time flexible? Show it.



Newly created appointments and meetings are automatically entered as busy, and events are automatically entered as free.

By keeping this information current and accurate, you'll benefit from features that let you share your schedule with others.

Is lunch time flexible? Show it.

Notes

- If you change the time setting for an event from free to anything else, the whole day for that event will appear shaded.
- If you change the time setting for a meeting you didn't create, your change will be overwritten if the meeting organizer updates the time of the meeting.

Suggestions for practice

1. Create practice calendar entries.
2. View the reminder time and change one reminder.
3. Make an appointment recur.
4. Change one instance of a recurring appointment.
5. Organise with colours.
6. Change how time appears.
7. Share your availability via e-mail (optional).

Test 2, question 1

You've double-clicked a recurring appointment to change it. In the dialogue box that opens, you see two options. Which option allows you to change the details for all instances of the appointment? (Pick one answer.)

1. The **Open this occurrence** option.
2. The **Open all appointments** option.
3. The **Open the series** option.

Test 2, question 1: Answer

The **Open the series** option.

To make a change to the entire series, select **Open the series**.

Test 2, question 2

You can use coloured categories to colour-code calendar entries. (Pick one answer.)

1. True.
2. False.

Test 2, question 2: Answer

True.

You can colour-code e-mail messages, too.

Test 2, question 3

You have a regular meeting that occurs on the first day of each month. The meeting will occur each month for an entire year. How many times do you need to type the details of the meeting? (Pick one answer.)

1. Once.
2. 12 times.
3. 365 times.

Test 2, question 3: Answer

Once.

Enter the meeting once and set its recurrence to Monthly, on the first day of the month, ending after a year. Then type the details, once only. Because you set it up as a recurring meeting, it will be entered in your calendar 12 times.