

Outlook 2003: Calendar and Tasks Learning Guide

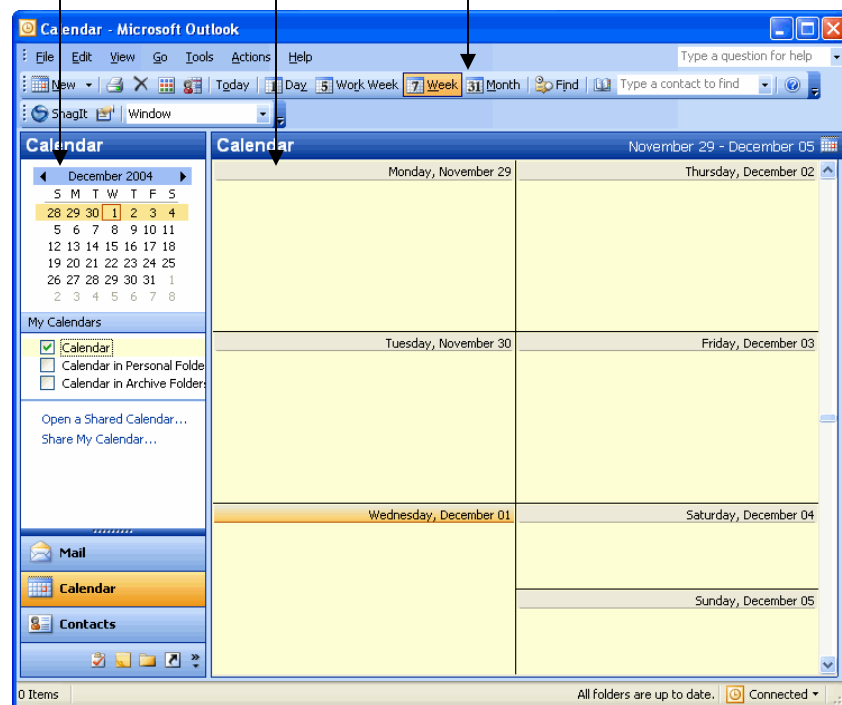
Understanding Outlook's Calendar

At first glance, Outlook's calendar window may seem complicated. Take a moment to understand the elements that make up the window and how they will be used.

Navigation pane

View pane

Standard toolbar



- The **Navigation** pane allows you to move between Mail, Calendar, Contacts, and Tasks, as well as to select folders within each application.
- The **View** pane displays the items within the folder you have selected in the **Navigation** pane.
- The **Standard** toolbar contains buttons for many of the common tasks that you will use in Outlook.

Using Outlook's Calendar

Outlook's **Calendar** is an electronic date book that allows you to manage your schedule by creating appointments and viewing your schedule in several formats.

- From the **Navigation** pane, click on the button labeled **Calendar**.

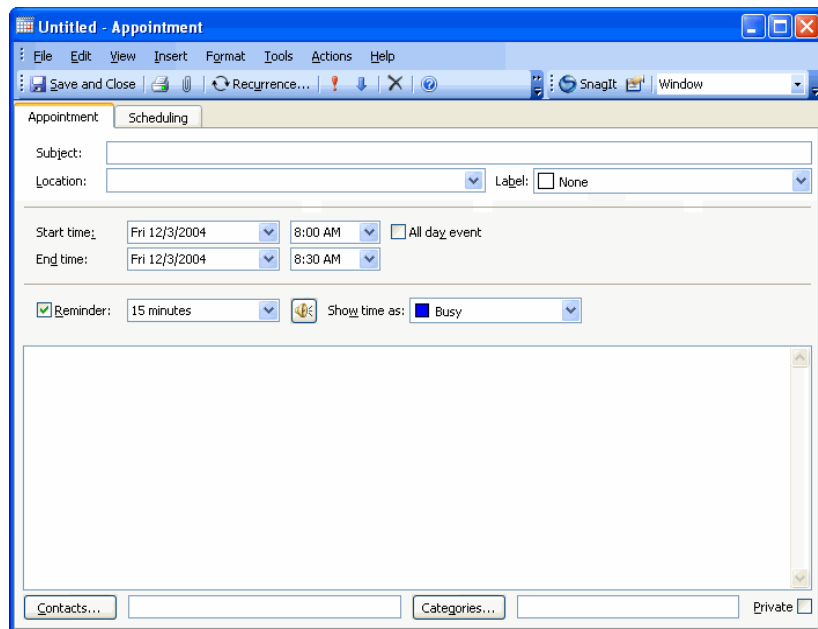


Creating an appointment

- Click on the button labeled **New**.



- The **Untitled-Appointment** window will appear.



- In the box labeled **Subject**, type a description of your appointment.

Subject: Meeting with group

- In the box labeled **Location**, type the location of your appointment.

Location: Office

- Click on the down-facing arrow next to the box labeled **Label**.

Label: None

- From the menu that appears, select a label that applies to your appointment.

Label: None

- None
- Important
- Business
- Personal
- Vacation
- Must Attend
- Travel Required
- Needs Preparation
- Birthday
- Anniversary
- Phone Call

Setting the Date and Time

The date and time will default to the day you had clicked on in the Calendar view, and the earliest available 30 minute period.

- To change the start date of your appointment:
 - Click on the down-facing arrow next to the box labeled with the default start date (for example, Tues 8/16/2005)
 - From the menu that appears, click on the actual date of your appointment.
 - Use the same technique to change the end date of your appointment.

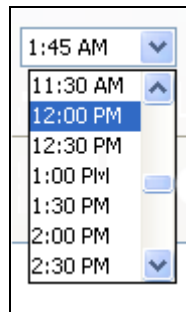
Start time: Tue 8/16/2005

End time: August 2005

| S | M | T | W | T | F | S |
|----|----|----|----|----|----|----|
| 31 | 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 | 9 | 10 |

Today

- To change the start time of your appointment:
 - Click on the down-facing arrow of the box labeled with default with the start time (for example, 1:45 AM)
 - From the menu that appears, click on the actual start time of your appointment.
 - Use the same technique to change the end time of your appointment.



Viewing your calendar and appointments

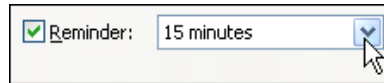
Outlook offers several ways to look at your electronic calendar.

| The view... | Allows you to see... |
|-------------|--|
| Day | A detailed list of appointments for any one day. |
| Work Week | Your Monday through Friday schedule for any particular week, with each day in its own column. |
| Week | Any particular week, Monday through Sunday, with each day in its own box and an abbreviated listing of each appointment. |
| Month | An entire month, with each day in its own box and a very abbreviated listing of each appointment. |

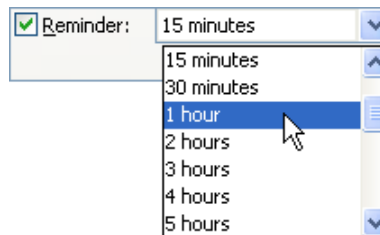
Appointment Reminders

Outlook will remind you of your appointment 15 minutes before its start time. If you want to change the timing of the reminder:

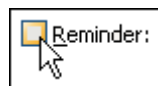
- Click on the down-facing arrow next to the box labeled **Reminder**.



- From the menu that appears, select a new time for your reminder to occur (for example, 1 hour).



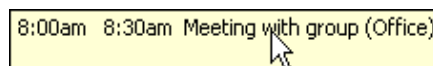
- If you do not want Outlook to remind you of your appointment, click to uncheck the box next to **Reminder**.



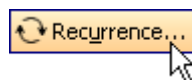
Creating a recurring appointment

If you have an appointment that occurs on a regular basis, Outlook can save you the trouble of typing it in every time. To create a recurring appointment:

- Double-click on the appointment in your calendar that you wish to set as recurring.



- In the appointment box that appears, click on the button labeled **Recurrence**.



- The **Appointment Recurrence** window will appear.
- In the window, check to make sure the appointment time is correct.

Appointment time

Start: 8:00 AM End: 8:30 AM Duration: 30 minutes

Setting the Recurrence Pattern

- In the section labeled **Recurrence Pattern**, set the recurrence of your appointment to one of the following shown below.

| If your appointment occurs... | Click on... |
|--------------------------------|--|
| Every day or every weekday | <input checked="" type="radio"/> Daily |
| On one or more days each week | <input checked="" type="radio"/> Weekly |
| On one or more days each month | <input checked="" type="radio"/> Monthly |
| On one or more days each year | <input checked="" type="radio"/> Yearly |

- From the recurrence pattern, select the days your appointment occurs (for example, Monday, Wednesday, and Friday).

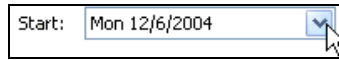
Recurrence pattern

Daily Recur every week(s) on:
 Weekly Sunday Monday Tuesday Wednesday
 Monthly Thursday Friday Saturday
 Yearly

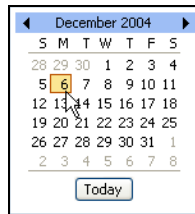
Setting your Appointment's End Date

- By default, the starting date for the recurring appointment will be set to the date of the original appointment. To change the starting date:

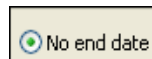
- Click on the down-facing arrow next to the **start** date.



- Select the date on which you want your recurring appointment to begin.

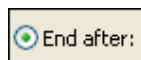


- If you want your appointment to recur indefinitely, click on the option button labeled **No end date**.

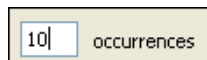


- If you want your appointment to recur a certain number of times:

- Click on the option button labeled **End after**.

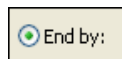


- In the text box, type the number of times you want your appointment to recur.

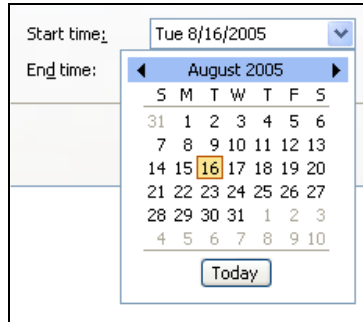


- If you want your appointment to recur until a certain date:

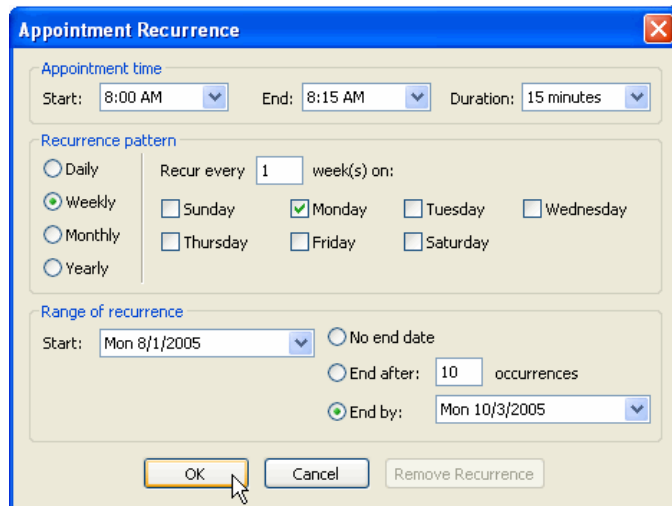
- Click on the option button labeled **End by**.



- Click on the down-facing arrow next to the default end date.



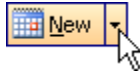
- Select the date on which you want your recurrences to end.



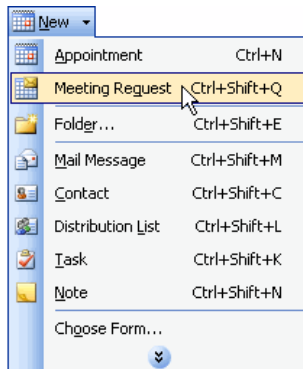
- Click on the button labeled OK.

Requesting and managing meetings

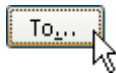
- Click on the down-facing arrow next to the button labeled **New**.



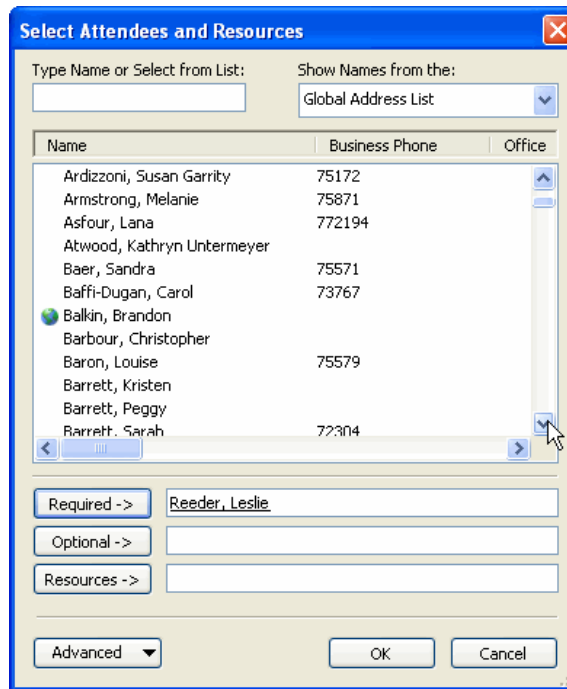
- From the menu that appears, select **Meeting request**.



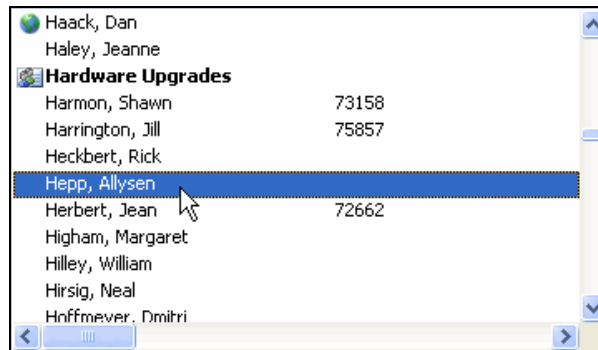
- The **Untitled-Meeting** window will appear.
- Click on the button labeled **To**.



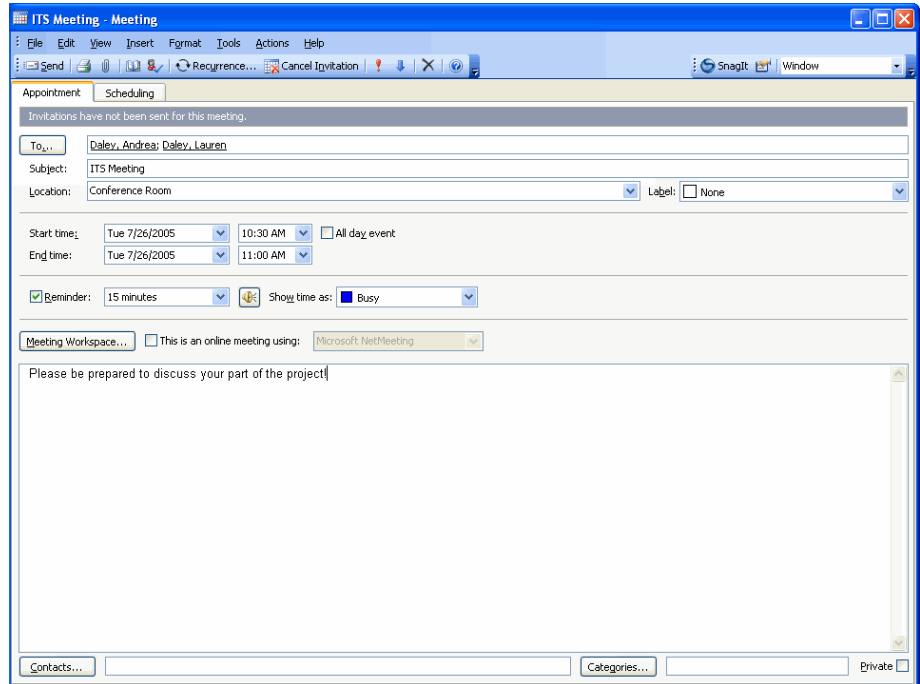
- The **Select Attendees and Resources** window will appear.
- Navigate to the name of a contact you want to invite to your meeting.



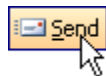
- Double click on the name of the contact you wish to add to your meeting.



- Repeat the process for all of the contacts you wish to add to your meeting.
- When you are finished, click on the button labeled **OK** to return to your appointment window.



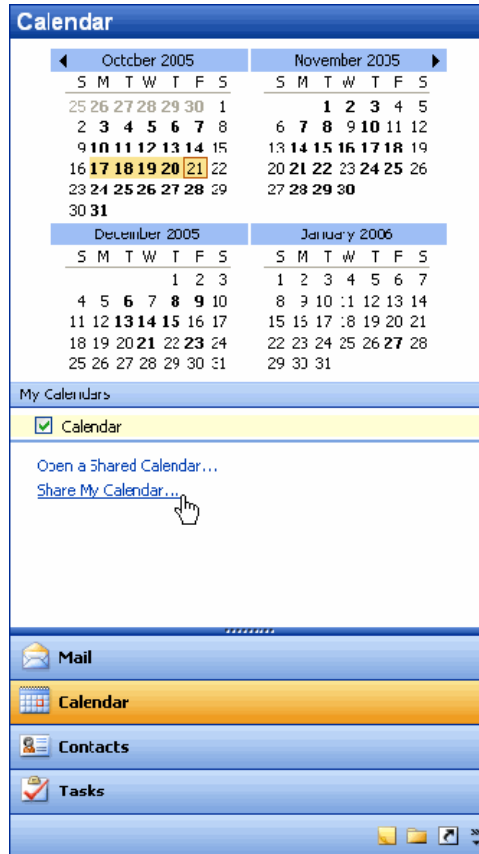
- In the box labeled **Subject**, type the subject of your meeting.
- In the box labeled **Location**, type the location of your meeting.
- In the boxes labeled **Start Time** and **End Time**, verify that the start and end times for your meeting are correct.
- If you want to receive a reminder, choose the length of time before your meeting.
- If you would like to add a message to the recipients of the invitation, type the message in the empty text box located at the bottom of the window.
- Click on the button labeled **Send**.



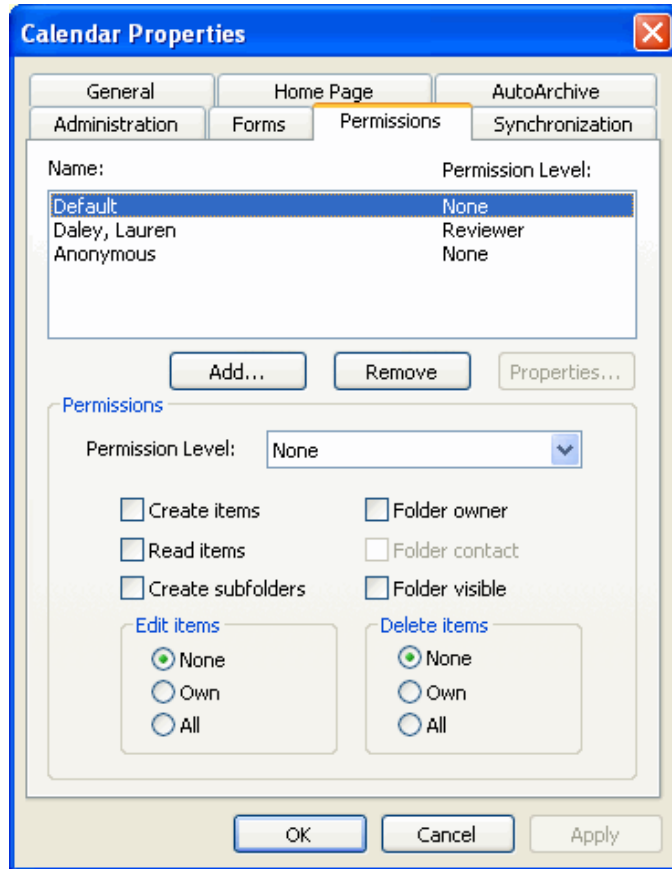
Sharing your Outlook calendar

Often times you may wish to share your calendar with other members of your department so that they can add, change, or delete appointments. To share your calendar:

- If you are not in Outlook calendar window
 - On the Navigation Pane, click on the button labeled **Calendar**.
- On the Navigation Pane, click on the link labeled **Share My Calendar**



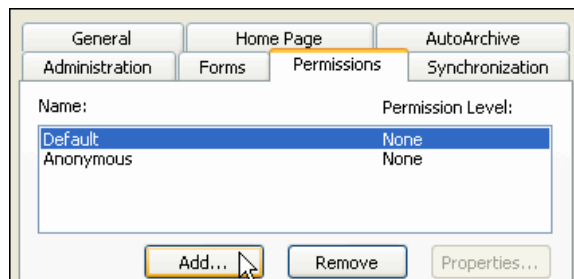
- The window labeled **Calendar Properties** will appear.



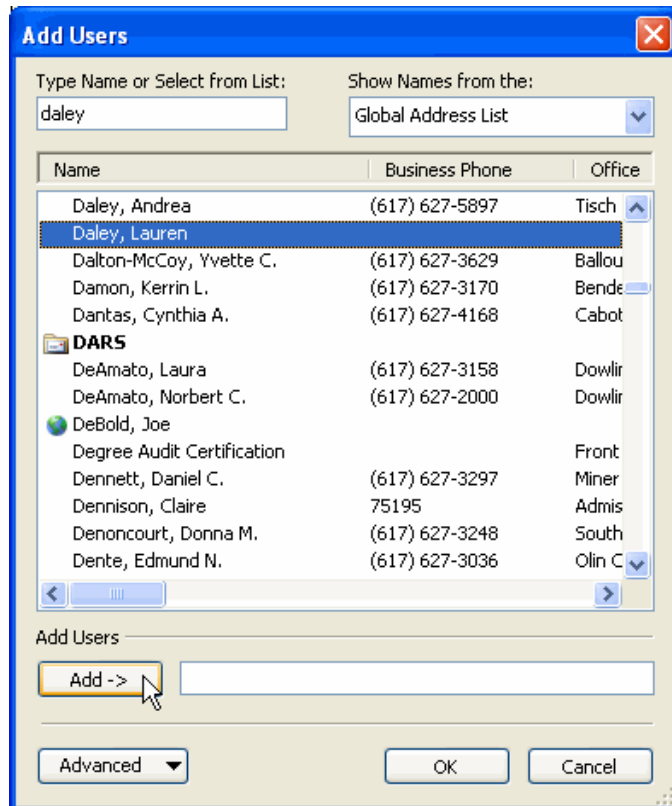
Adding Shared Calendar Recipients

In order to allow colleagues to view your calendar, you must first add them and then assign their permissions. To add a recipient:

- In the middle of the Calendar Properties window, click on the button labeled **Add**.

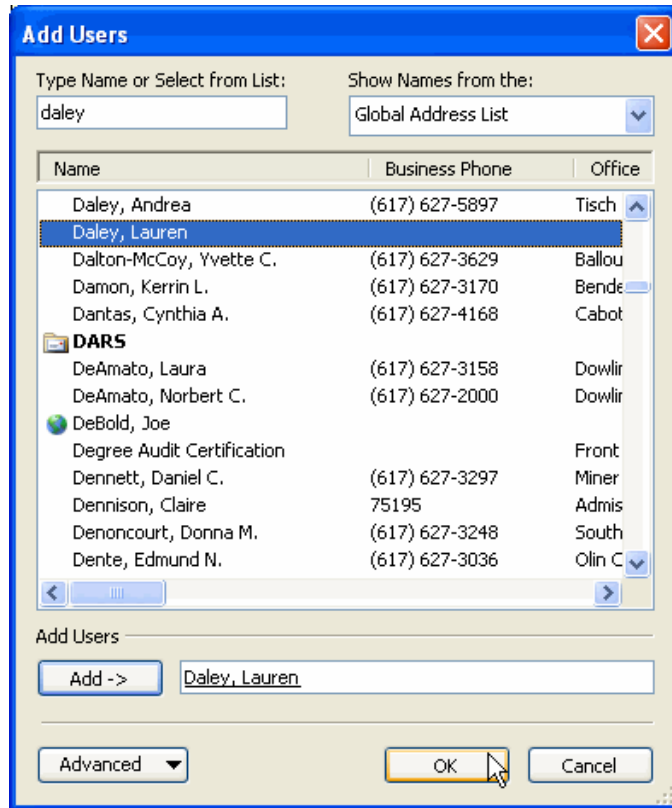


- The **Add Users** window will appear.
- Confirm that **Global Address List** appears in the box labeled **Show Names from the**.
- In the box labeled **Type Name or Select from List**, begin typing the name of the recipient or your shared calendar.
- From the list that appears, click on their name.
- Click on the button labeled **Add**.



- Repeat the previous steps to add more recipients of your shared calendar.

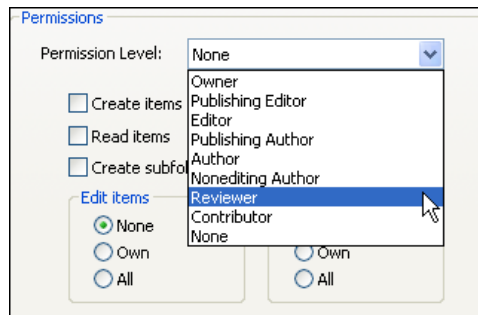
- When you have added all recipients, click on the button labeled **OK**.



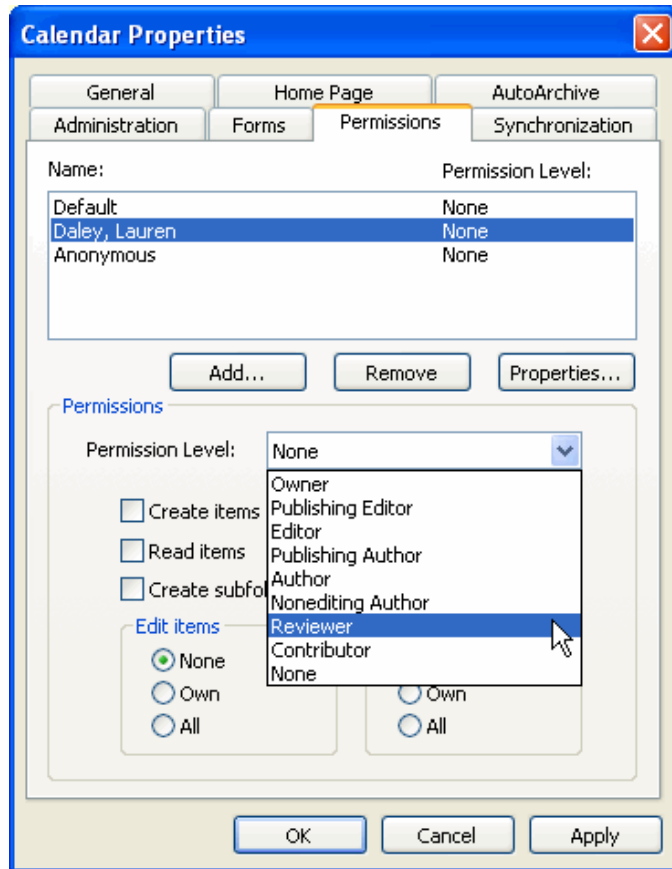
Assigning Permission to Shared Calendar Recipients

Once you have added recipients of your shared calendar, you must assign them permissions. To give shared calendar recipient permissions:

- In the middle of the Calendar Properties window, click on the name of the recipient you wish to assign permissions.
- Click on the down-facing arrow next to the box labeled **Permission level**, and select the permission you wish to give the recipient (for example Reviewer).



- Repeat the previous steps until you have given permissions to all shared calendar recipients.
- When you have finished assigning permissions, click on the button labeled **OK**.

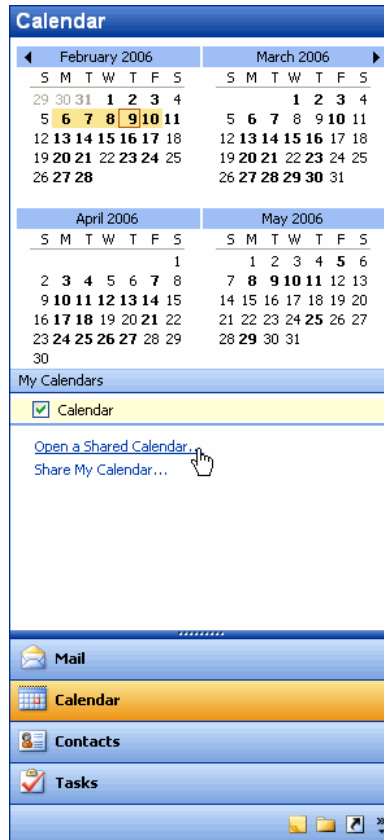


Opening a Shared Calendar

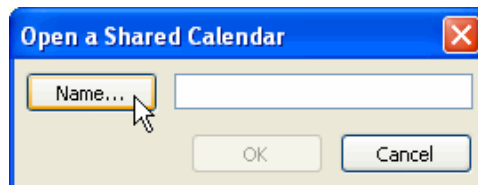
Although a colleague may have listed you as a recipient of their calendar, you must open the shared calendar in order to view it.

To view a shared calendar:

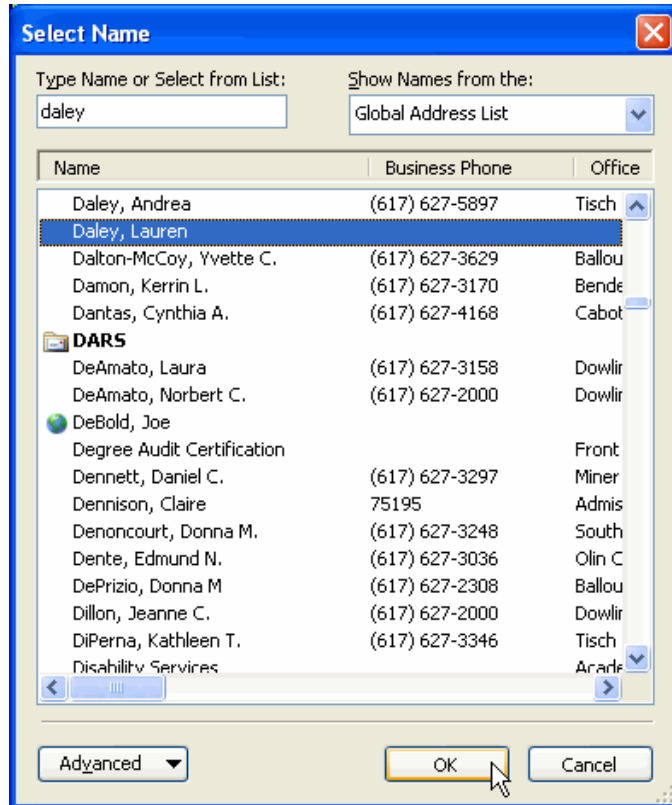
- On the navigation pane, click on the labeled **Open a Shared Calendar**



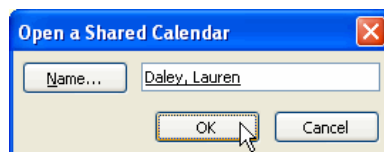
- The **Open a Shared Calendar** window will appear.
- Click on the button labeled **Name**.



- The **Select Name** window will appear.
- Confirm that **Global Address List** appears in the box labeled **Show Names from the**.
- In the box labeled **Type Name or Select from List**, begin typing the name of the person whose shared calendar you wish to view.
- From the list that appears, click on their name.
- Click on the button labeled **OK**.



- The **Open a Shared calendar** window will appear.
- The name of the person whose shared calendar you wish to view will appear in the box labeled **Name**.
- Click on the button labeled **OK**. To view the shared calendar.



Using Outlook's Tasks

The **Tasks** section of Outlook is essentially a thorough to-do list, through which you can remind yourself of simple chores or manage complex, long-term projects among several people. Using Tasks, you can integrate calendar items, e-mail, contacts, and computer files into one easily accessible project.

Creating a new task

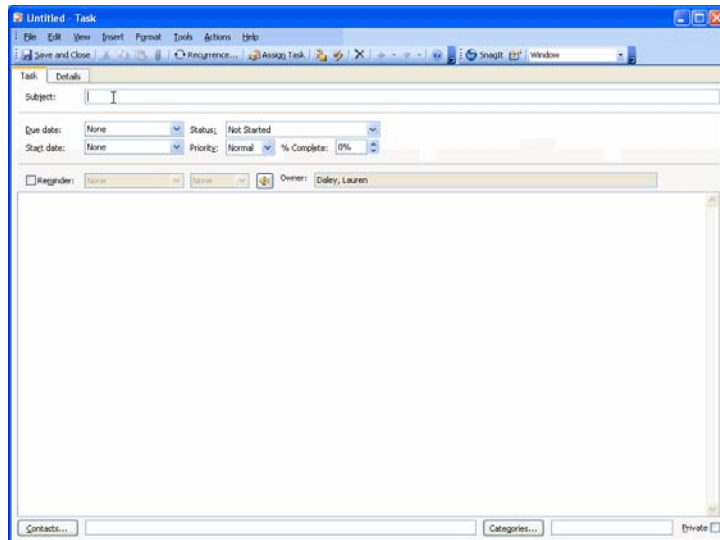
- In the Navigation Pane, click on the button labeled **Tasks**



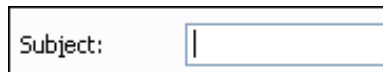
- On the standard toolbar, click on the button labeled **New**.



- The **Untitled-Task** window will appear.



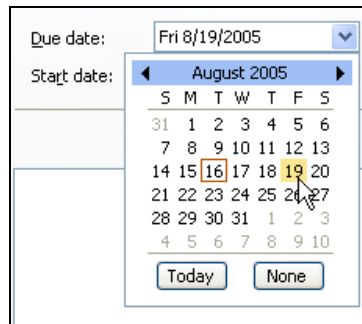
- Click in the box labeled **Subject**.
- In the box, type a brief description of your task.



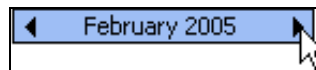
Assigning a due date

If your task must be finished by a certain date, you can assign a due date. To assign your task a due date:

- Click on the down-facing arrow next to the box labeled **Due date**.
- From the calendar that appears, click on the due date of your task (for example, Fri 8/9/2005).



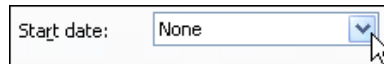
- To move the calendar to a future month, click on the right facing arrow next to the month and year.



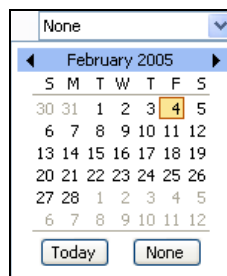
Assigning a starting date

If your task has a specific starting date, such as a project planning meeting, you can designate that in Outlook task. To assign your task a starting date:

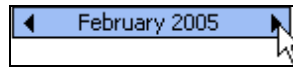
- Click on the down facing arrow located next to the textbox labeled **Start date**.



- A small calendar will appear, containing the month and year at the top.



- To move to a future month, click on the right facing arrow next to the month and year.



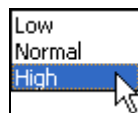
Assigning priority level

You can order your tasks by importance by giving each a priority of high, normal, or low. To assign your task a priority level:

- Click on the down facing arrow next to the box labeled **Priority**.



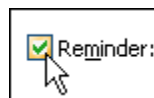
- From the menu that appears, select the appropriate priority setting.



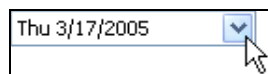
Setting a reminder

Outlook can automatically remind you of a task close to its due date. To set a reminder:

- Click to place a check mark in the square labeled **Reminder**.

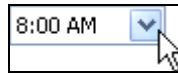


- If you want to change the default date:
 - Click on the down-facing arrow next to the default date.

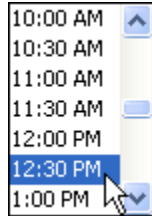


- A small calendar will appear, containing the month and year at the top.
- To move to a future month, click on the right facing arrow next to the month and year.
- When you have found the date on which you would like Outlook to remind you of your task, click on it once.

- To change the time of your reminder
 - Click on the down-facing arrow next to the box containing the time.



- From the menu that appears, select the new time you wish to set for your reminder.



Setting a task to repeat

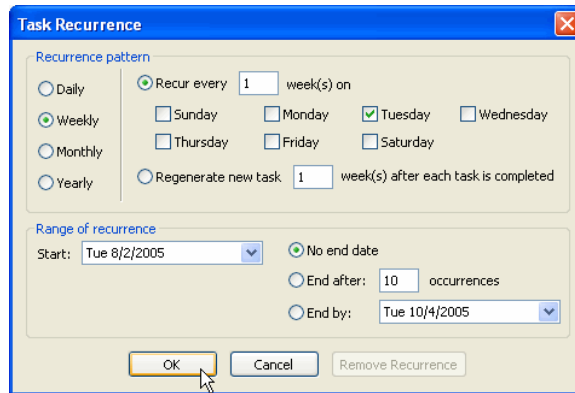
If your task is one that occurs on a regular basis, Outlook allows you to create a recurring task. To set a recurring task:

- On the **Untitled-Task** window, click on the button labeled **Recurrence**.

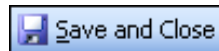


- The **Task Recurrence** window will appear.
- In the **Recurrence Pattern** section, set the frequency with which you want your task to recur. For example, if your task is something that must be done each week on Tuesday, such as payroll:
 - Click on the option button labeled **Weekly**.
 - Click on the option button labeled **Recur every**.
 - Click to place a checkmark in the box labeled **Tuesday**.
- If you want your task to end on a certain date:
 - Click on the option button labeled **End by**.
 - Click on the down-facing arrow next to the default end date.
 - Navigate to the date you want your task to stop repeating on.
 - Click on the date.

- If your task will occur a certain number of times and then stop:
 - Click on the option button labeled **End after**.
 - Click in the text box labeled **End after**.
 - In the text box, type the number of times you want your task to repeat.
- When you have set the recurrence pattern and range, click on the button labeled **OK**.



- When you have finished setting up your new task, click on the button labeled **Save and Close**.



- Once you have created and saved a new task, it will appear in a list of tasks in the **View Pane** of the Outlook window.

| Tasks | | | | | |
|------------------------------|---------|-------------|---------------|------------|------------|
| | Subject | Status | Due Date | % Complete | Categories |
| Click here to add a new Task | | | | | |
| | Task 1 | Not Started | Mon 2/28/2005 | 0% | |
| | Task 2 | In Progress | Thu 2/24/2005 | 0% | |
| | Task 3 | Not Started | None | 0% | |
| | Task 4 | Not Started | Thu 2/24/2005 | 0% | |
| | Task 5 | Not Started | Sat 3/19/2005 | 0% | |

Sorting tasks

Outlook allows you to sort your tasks according to a variety of criteria, including priority level and due date.

- To arrange your tasks by priority level, click on the **exclamation point** icon located in the grey bar at the top of your **tasks** list.



- To arrange your tasks by due date, click on **Due Date** in the grey bar at the top of your tasks list.



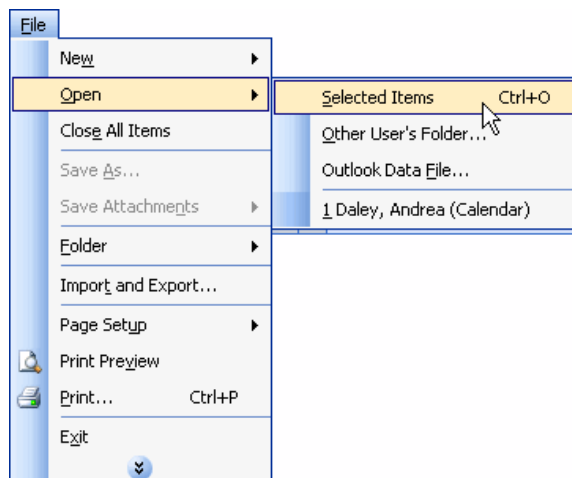
Viewing and editing a task

After you have created your new task, you may wish to access it again to view details that do not appear in the View pane, or to change information related to your task. To access a task:

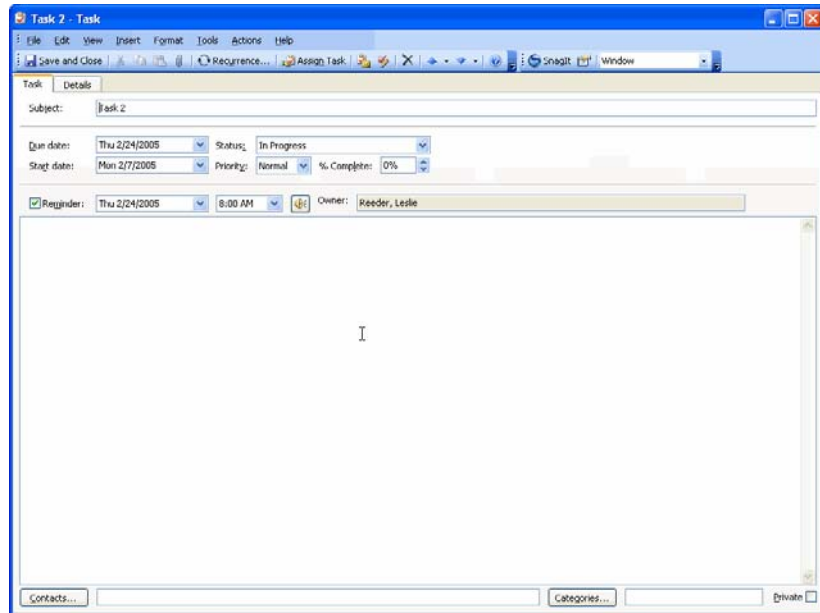
- Click on the task you wish to view so that it is highlighted in blue.



- From the **File** menu, select the **Open** submenu.
- From the **Open** submenu, select **Selected Items**.



- The **Task** window will appear.



- In the **Task** window, make any changes to the appointment you would like.
- Click on the button labeled **Save and Close**.

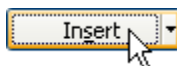
Attaching files to a task

If your task involves files on your computer or network drive, you may wish to attach copies of your files to the task for easy access through Outlook. To attach a file to a task:

- Open up your task for editing.
- In the **Task** window, click on the **paperclip** icon.



- The **Insert File** window will appear.
- Navigate to the file you wish to attach to your task.
- When you have found the file you want, click on the button labeled **Insert**.



- The file you inserted will appear as an icon in the main text box of your Task window.



- Click on the button labeled **Save and Close**.