

# Outlook © Greg Olynyk – October 3, 2007

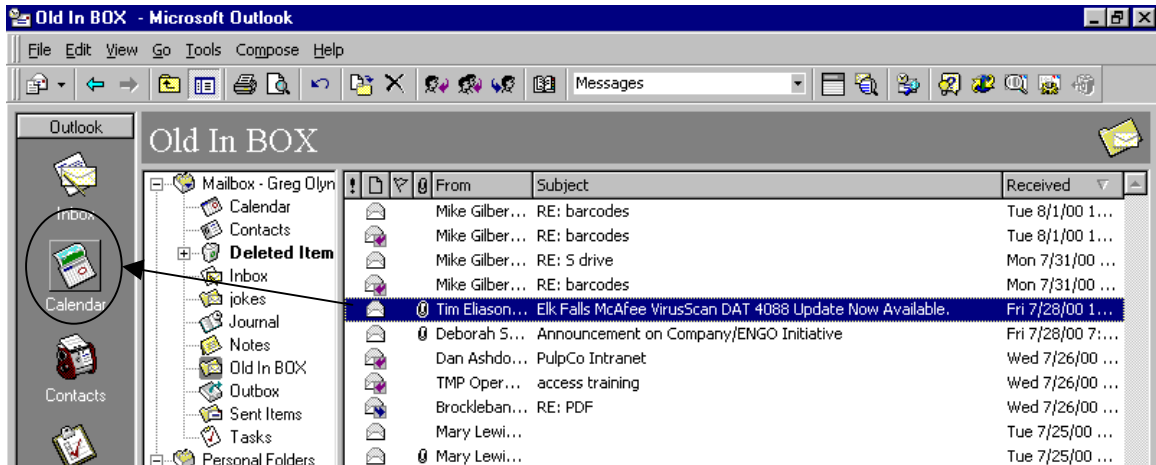
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## Drag & Drop

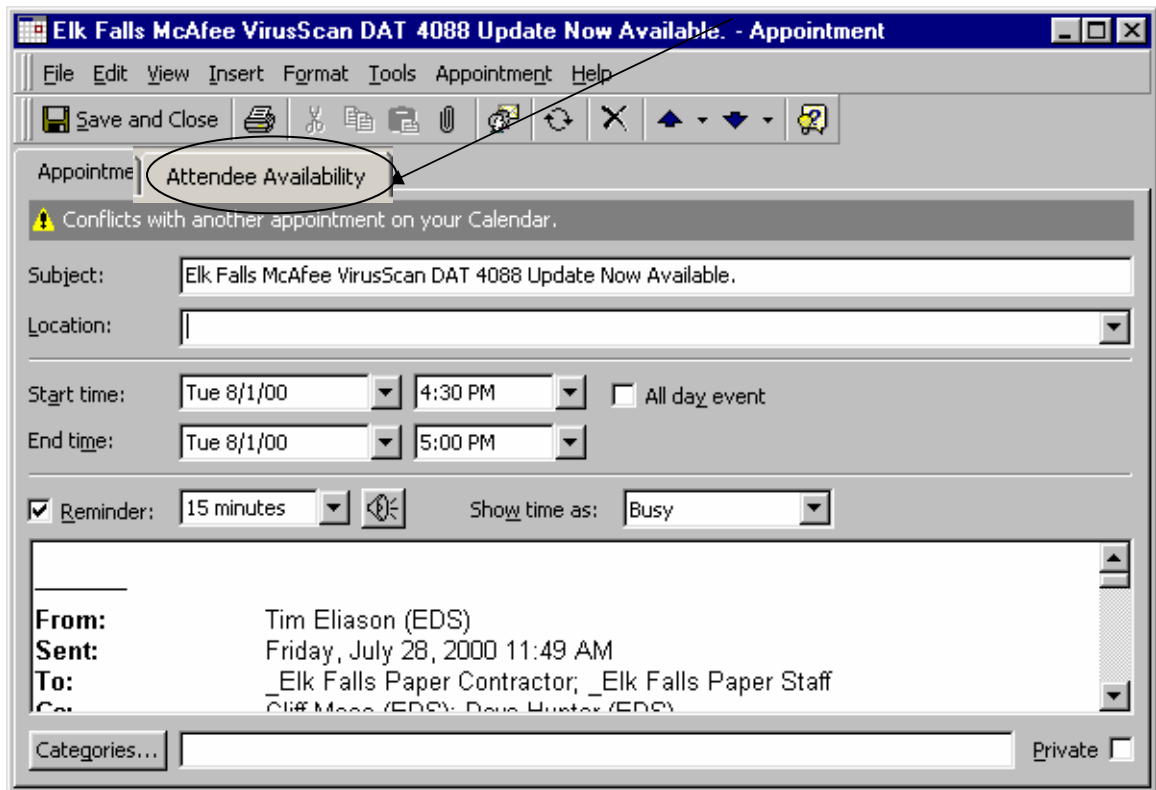
You can drag an email to the calendar icon to schedule an appointment, drag to the **CONTACTS** icon to add the name & email to your contact database, drag to **TASKS** to add it as a new task (to do list item) or drag to **NOTES** to add it as a “post-it” note.

Appointments can be scheduled by drag & drop.

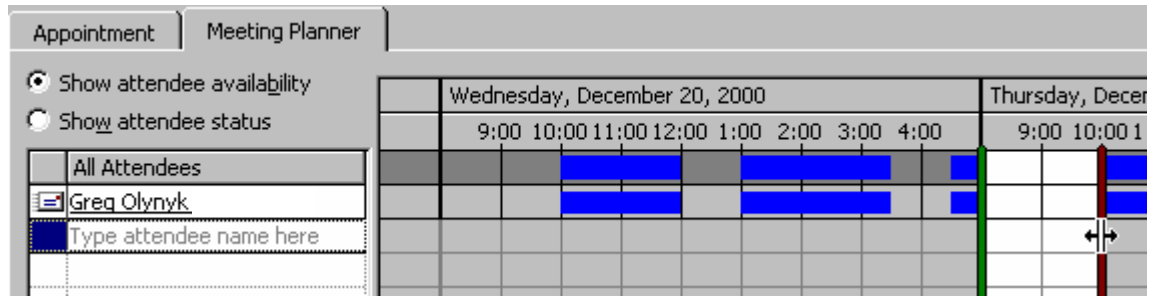
1. Drag an email to the calendar icon.



2. The Subject and details are filled in – Select Attendee Availability



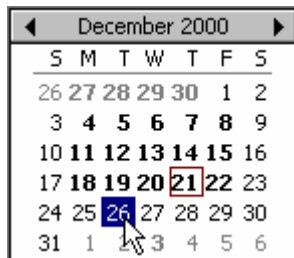
3. Click & drag to highlight desired time slot... Save & Close !



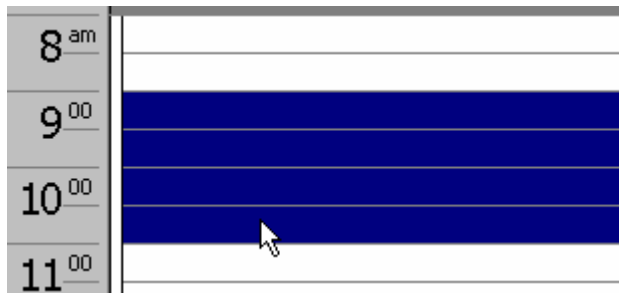
## Manually Add Appointment

### Blocking Method

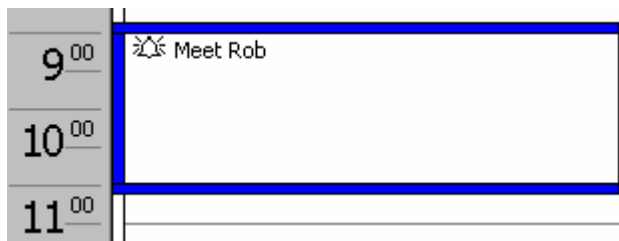
1. Select date on calendar panel



2. Click and drag to select time block



3. Type Appointment Title and [Enter] – then bell appears




4. Double click appointment to fine-tune – enough advance warning? Out of Office?  
If the appointment is at 1pm, perhaps 1.5 hours warning needed...

## Editing

Move Appointment = drag & drop in any View – or to small calendar

Clone Appointment = [Ctrl] & drag & drop

Delete Appointment = 

Select multiples = [Ctrl] selects non-adjacent items (to move or delete)

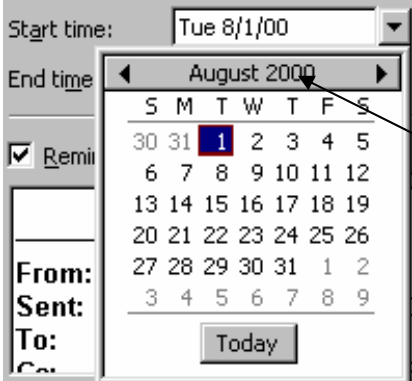
Undo = [Ctrl] [z] (best method since almost always available in most software)

Double click to edit an appointment's settings

## Date Changes

Type date – Aug 15 (defaults to current year)

Use the dropdown to select a distant date



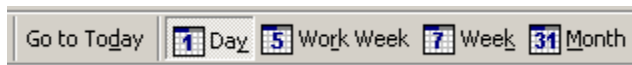
The screenshot shows a calendar interface with the following elements:

- Start time:** Tue 8/1/00
- End time:** August 2000
- Reminders:** A checked checkbox labeled "Remi".
- Calendar Grid:** A grid for August 2000 with days of the week (S, M, T, W, T, F, S) and dates. The date "1" is highlighted in a red box.
- Buttons:** "From:", "Sent:", "To:", and "Today".

Annotations on the right side of the screenshot:

- Defaults to today – or click “Today”
- Triangle Toggles for month (center for leap frog)
- Select day
- End time defaults to same date

## Views



**Current date** – “Go to Today “ from any view – jumps to the current date

Week and Month views – [PageUp] and [PageDown] work nicely

Select group of days (click & drag or [Shift] select or [Ctrl] select for non-adjacent – what you select is what you get to view, great to compare, move, clone...

### ***Day at a Glance – Default View***

Great to easily select blocks of time for appointments.

### ***Week at a Glance***

Monday, August 14 1:00pm Word 4:30pm Word	Thursday, August 17
Tuesday, August 15	Friday, August 18
Wednesday, Aug 16 1:00pm Word 4:30pm Word	Saturday, August 19

can easily move / clone appointments

Page Up / Down – next week or previous week

Select Multiples – [Shift] or [Ctrl]

**Month at a Glance**

Mon	Tue	Wed	Thu	Fri	Sat/Sun
July 31 Windows Basic	August 1 Excel s1 Welcome to Ca Outlook email Outlook em	2 Excel - Functio	3 Eric Mike Outlook Sched	4 Eric Eric	5 6
7	8 off	9 off	10 off	11 off	12 13
14 Word Word	15	16 Word Word	17	18	19 20
21 Word Word	22 Access Access	23 Word Word	24 Access Access	25	26 27
28 Word Word	29 Access Access	30 Word Word	31 Access Access	September 1	2 3

Try Cloning with [Ctrl] drag

**View Selection**

Select the days from the side Calendar - try also non-adjacent with [Ctrl] selecting

April 2001						
S	M	T	W	T	F	S
25	26	27	28	29	30	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	1	2	3	4	5

	Mon 2	Tue 3	Wed 4	Thu 5
8 <sup>am</sup>				
9 <sup>00</sup>	Meet Bob		Dentist	
10 <sup>00</sup>				courses
11 <sup>00</sup>				
12 <sup>pm</sup>	Redo Safet plann	Phone Phil	Plan	
1 <sup>00</sup>				
2 <sup>00</sup>				
3 <sup>00</sup>				

## Edit Method

1. Double click start block

The screenshot shows the Outlook Meeting Planner dialog box. The subject is "Holidays". The start time is "Tue 12/26/00" at "11:00 AM" and the end time is "Tue 12/26/00" at "11:30 AM". The "All day event" checkbox is unchecked. The "Show time as" dropdown is set to "Busy". A calendar pop-up for December 2000 is open, showing the date 26th selected. The "Reminder" checkbox is checked.

2. Type Subject / Location (adds what you type to dropdown for future use)
3. Type or Select End Date and or time
4. All Day Event ?
5. Show time as – Out of Office (Email –Tools – Out of Office)
6. Reminder – perhaps 3 days in advance... 12h / 22d / 3w
7. Note you can attach a file to an invite – in case you want them to POST the notice of the meeting for others who do not have Outlook
8. Save & Close

## Vacation

Vacation – All day event / Out of Office / Start & End Date - no need for “recurrences” – easy to change start date if needed... alarm 4 days in advance enough notice?

The screenshot shows the Outlook Meeting Planner dialog box for a vacation. The subject is "Vacation". The start time is "Tue 11/04/2003" and the end time is "Fri 11/14/2003". The "All day event" checkbox is checked. The "Reminder" checkbox is checked, and the reminder is set to "4 days". The "Show time as" dropdown is set to "Out of Office".

## Recurring Appointment

**Appointment Recurrence**

Appointment time  
 Start: 2:30 PM End: 4:30 PM Duration: 2 hours

Recurrence pattern  
 Daily Recur every 1 week(s) on:  
 Weekly  Sunday  Monday  Tuesday  Wednesday  
 Monthly  Thursday  Friday  Saturday  
 Yearly

Range of recurrence  
 Start: Wed 8/2/2000  No end date  
 End after: 10 occurrences  
 End by: Wed 10/4/2000

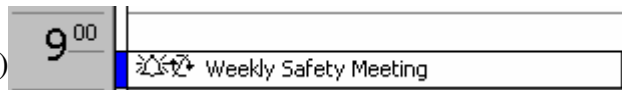
OK Cancel Remove Recurrence

- 1) Try daily – 8am to 9 am – only weekdays – no end date or ending after 10 occurrences
- 2) Weekly – Mon & Weds – end after 6 occurrences (3 week course perhaps)
- 3) Monthly – 2<sup>nd</sup> Friday of every Month – end by Calendar choice
- 4) Yearly – same date – no end (Birthdays) - show time as Free / All Day Event

OK – SAVE & CLOSE =



Move an Occurrence =  
 (orphan - not same as series)



Delete a Recurring -

Delete just one, then delete all occurrences

**Confirm Delete**

Do you want to delete all occurrences of the recurring appointment "Weekly Safety Meeting", or just this one?

Delete all occurrences.  
 Delete this one.

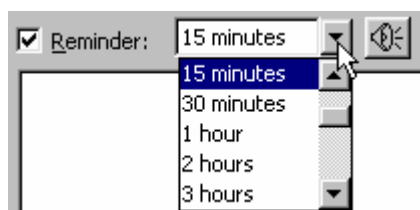
OK Cancel

Edit Series – change start time / end time – orphans will be forced the same

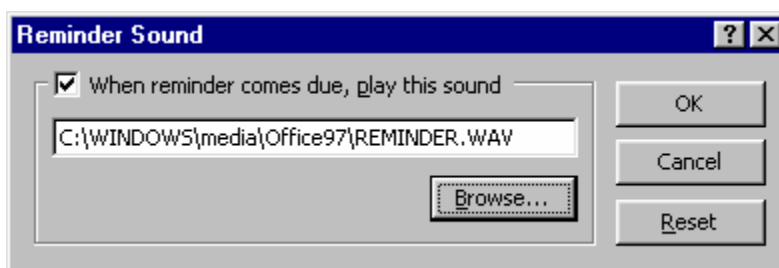
## Reminders

When you set the appointment – a default (can be changed in Tools - Options) 15 minute advanced warning will be set.

Just type what you need – 13h / 22d / 3w



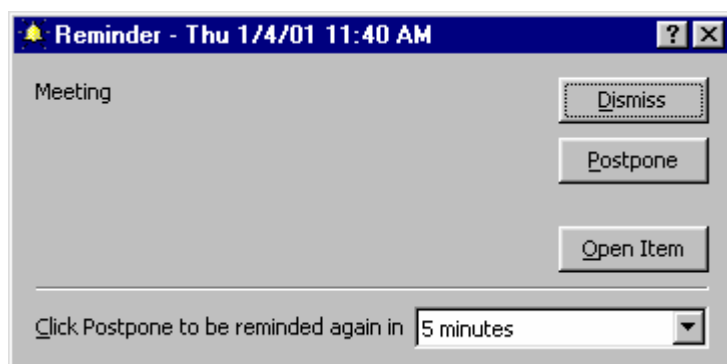
You can even alter the sound effect for the reminder – birthday song for birthdays, severe alarm for important meetings, etc. – click the speaker icon;



Browse to locate any wav file you have..

## **Appointment Reminders**

This is what the reminder pop-up looks like;

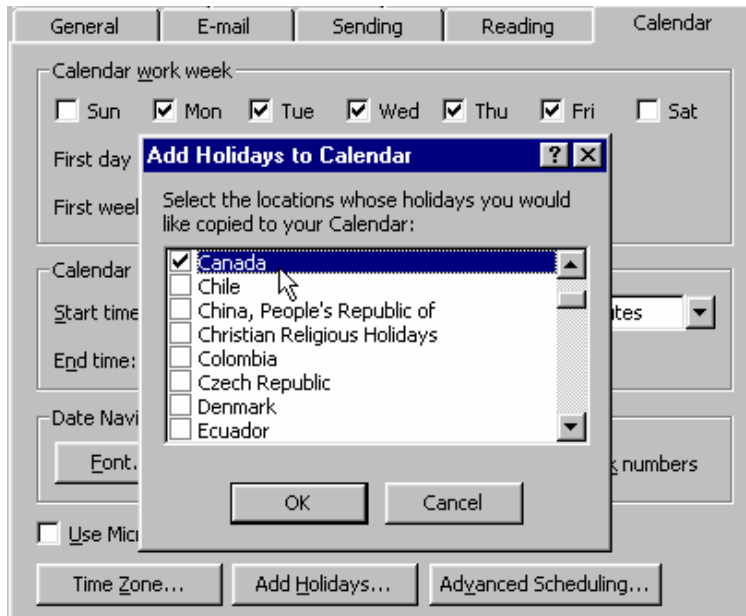


**Dismiss** – you are on your way - deactivates reminder

**Postpone** – the dropdown says it will remind you again after 5 minutes (say you are busy with a client and want the reminder again) you can alter the reminder recurrence by the dropdown.

**Open Item** – to re-schedule it...

## Tools – Options – Calendar



Add Holidays – may have to contact help desk if it will not allow you to add them

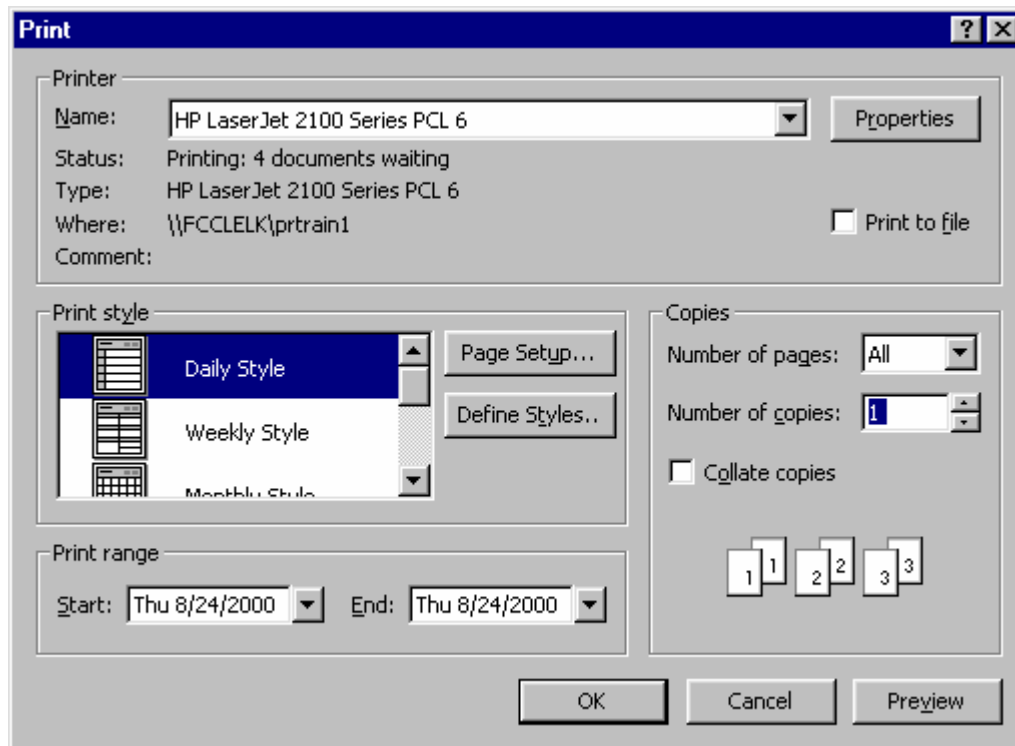
Change your work day times / Week days you work...

Default reminder alarm – perhaps you usually need 20 minutes to get anywhere.

Contact help desk if Holidays won't go in...

## Printing

*File - Print*



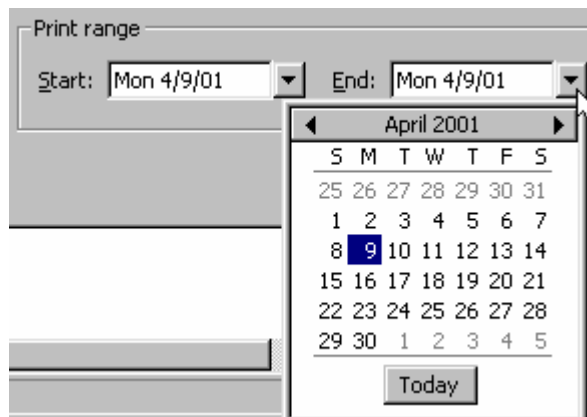
try TriFold Style – Preview Button



August 29, 2000	Tri-fold	August 21 - August 27
07 <sup>th</sup>	<ul style="list-style-type: none"> <li>07<sup>th</sup> - 08<sup>th</sup> - 09<sup>th</sup> - 10<sup>th</sup> - 11<sup>th</sup> - 12<sup>th</sup> - 01<sup>st</sup> - 02<sup>nd</sup> - 03<sup>rd</sup> - 04<sup>th</sup> - 05<sup>th</sup> - 06<sup>th</sup></li> </ul>	<ul style="list-style-type: none"> <li>Monday, August 21</li> <li>Tuesday, August 22</li> </ul>
08 <sup>th</sup>		
09 <sup>th</sup>		
10 <sup>th</sup>		
11 <sup>th</sup>		
12 <sup>th</sup>		
01 <sup>st</sup>		
02 <sup>nd</sup>		
03 <sup>rd</sup>		
04 <sup>th</sup>		
05 <sup>th</sup>		
06 <sup>th</sup>		

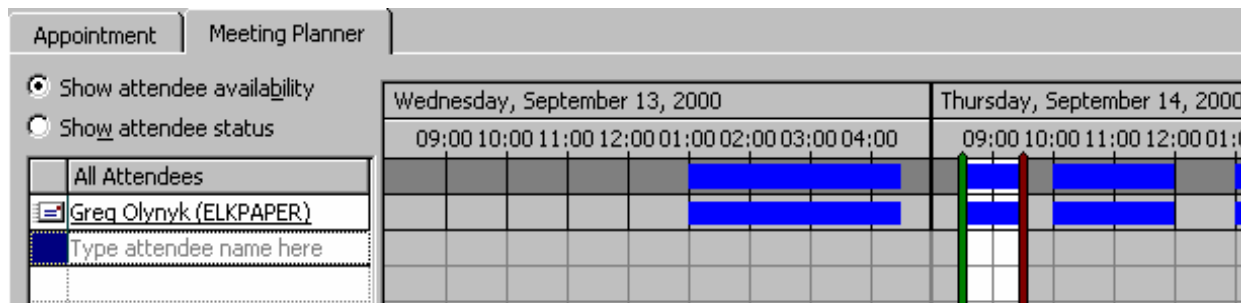
**Print Range**

Specify the End Date



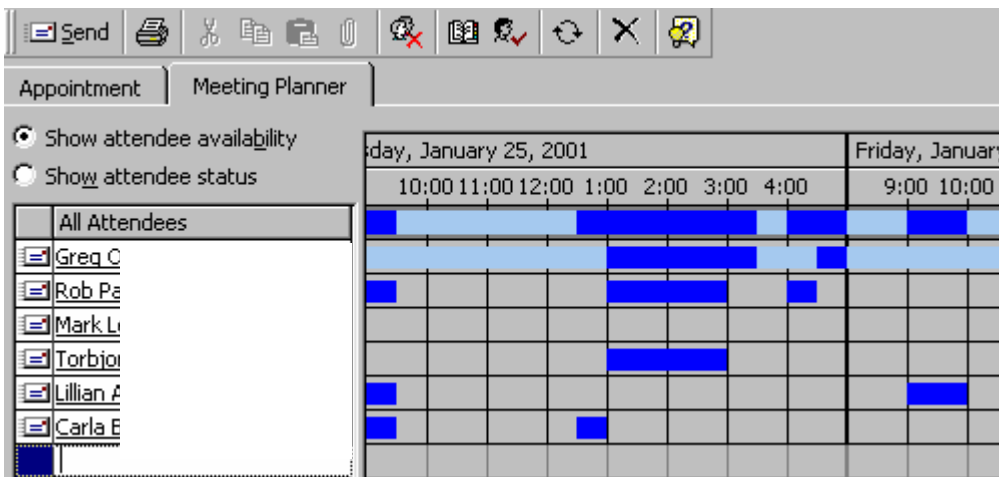
## Planning Meetings

When you schedule a meeting try meeting planner;



Invite Others button to activate your address book can invite other people, groups of people and/or meeting rooms (to even just see if room is available) If you have AUTHOR rights on that room, you could invite it as a resource to book it if it is available – also requires the room to Auto Accept / Decline – unless a delegate is monitoring that room’s emails they can ACCEPT or DECLINE your booking request.

Helps to find a time block where you all are available...



**Auto Pick** - Will locate the next available time for all invited people

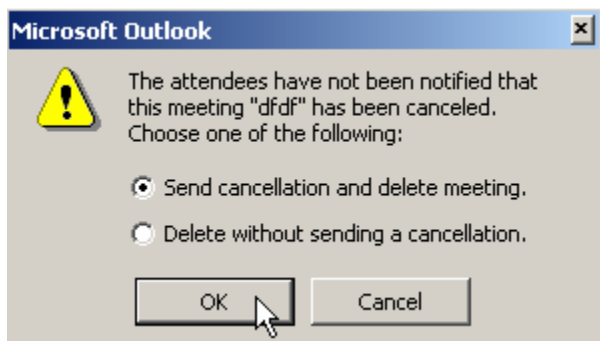
**Send** will invite the others and add the meeting on their calendars as well if they click Accept – if Reject – they should let you know why... If they choose Accept yet when prompted to send response and click no, you will always show that invitee as no response... Perhaps we could remove that option of “no response” You can set up Inbox Rules to direct these responses as desired to Trash or folders appropriately...

**Future Meetings with same people?**

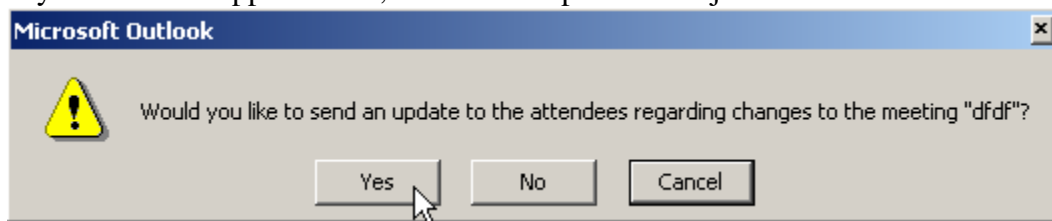
File – Save As – Meeting – As Type – Outlook Template...

**Un-Invite**

If you delete the meeting – it will prompt you to send a Cancel update – definitely a good idea to do so...



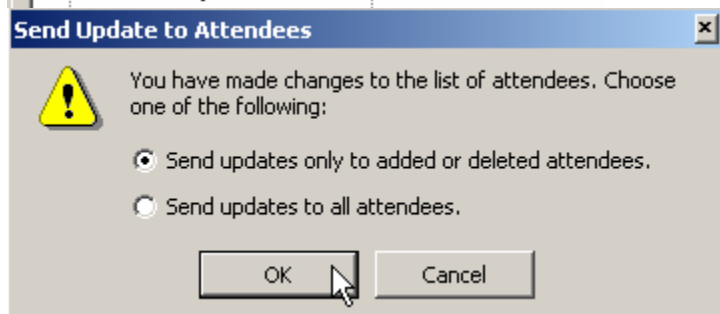
If you move the appointment; then Send Update – not just Save & Close...



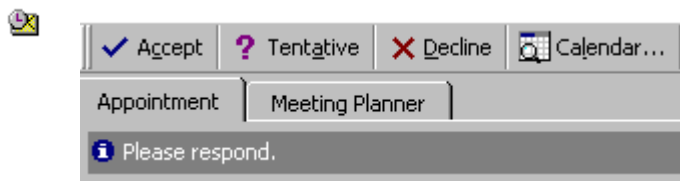
If you want to send a reminder again to all, just open the appointment –

If you want to **un-invite** a person, toggle them with an X and send update – to just changed attendee(s) (added or deleted)...

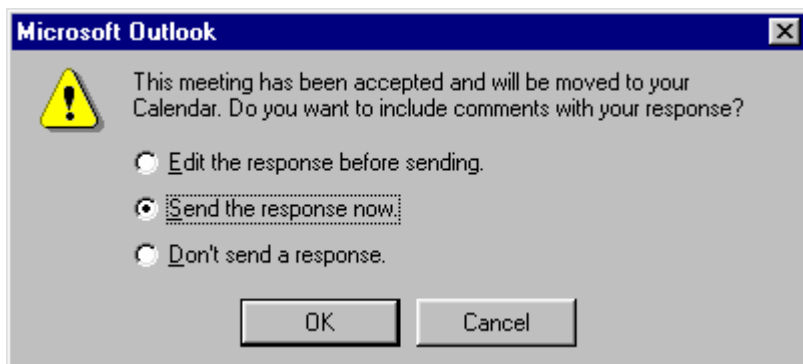
	ELKPRTRAINING4 (Elk Falls)	Required Attendee
	ELKPRTRAINING5 (Elk Falls)	Required Attendee
	ELKPRTRAINING6 (Elk Falls)	Required Attendee
	ELKPRTRAINING7 (Elk Falls)	Required Attendee
	ELKPRTRAINING8 (Elk Falls)	Required Attendee
	ynvk, Greg (Elk Falls)	Required Attendee
Click here to add attendee		



### Receive Meeting Invitation

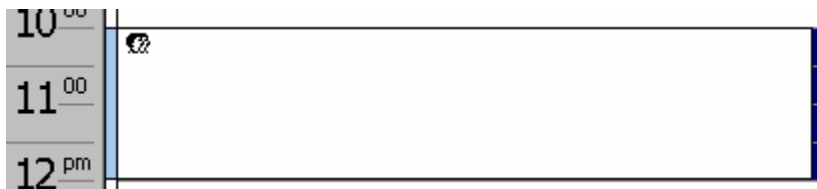


**Accept** – then **SEND** response (just click OK) so they know you have accepted, no need to add comments to acceptance, people usually do not read acceptance notifications, especially if the invite comes from a room...



- Choose "Don't send" to only affect your calendar and **not** notify the meeting organizer of your decision (when would you want that?)

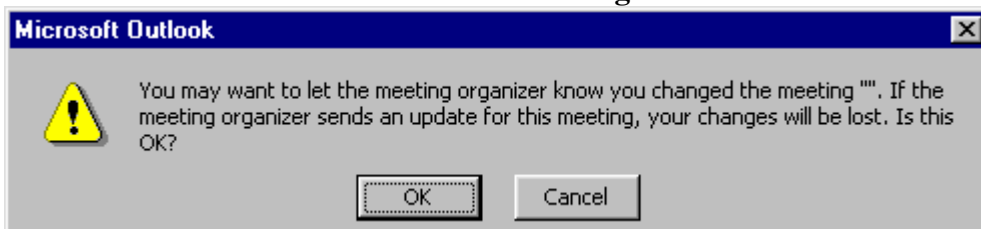
**Tentative** – puts it in your calendar – pale blue, can be bumped by other invites...



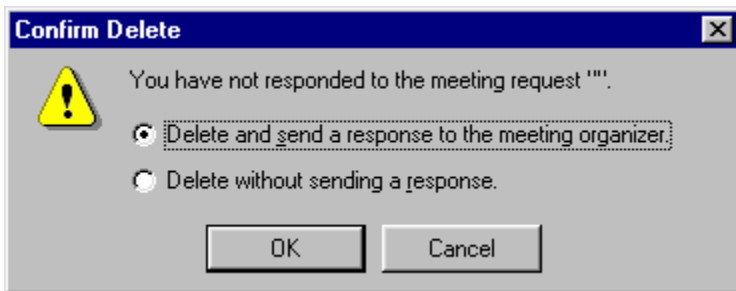
**Decline** – Please send response and perhaps explain why to the meeting organizer if you feel that would be appropriate.

**Calendar...** To see that new appointment if it conflicts with your life... Then just exit the calendar view and decide accept or decline...

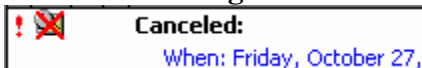
**Move it? Do not move someone else's Meeting – it will have no effect on their PC**



**Delete it?**



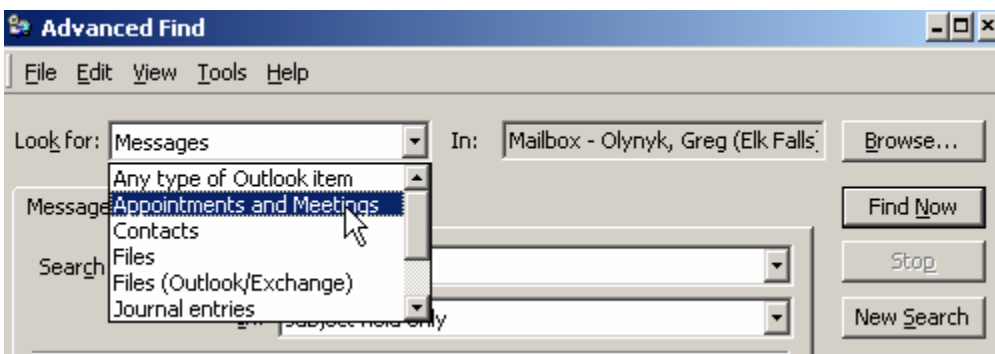
**Canceled notice goes out..**



**Advanced Find**

Lose something? Tools – Advance Find will help

Be in the folder where you think it might be... if uncertain – select your main MAILBOX and it will search all sub folders as well.



Note: DENT will find dentist as well as dental appointments, but will also find President’s Day ! Simply double click the item desired... or delete it, etc...

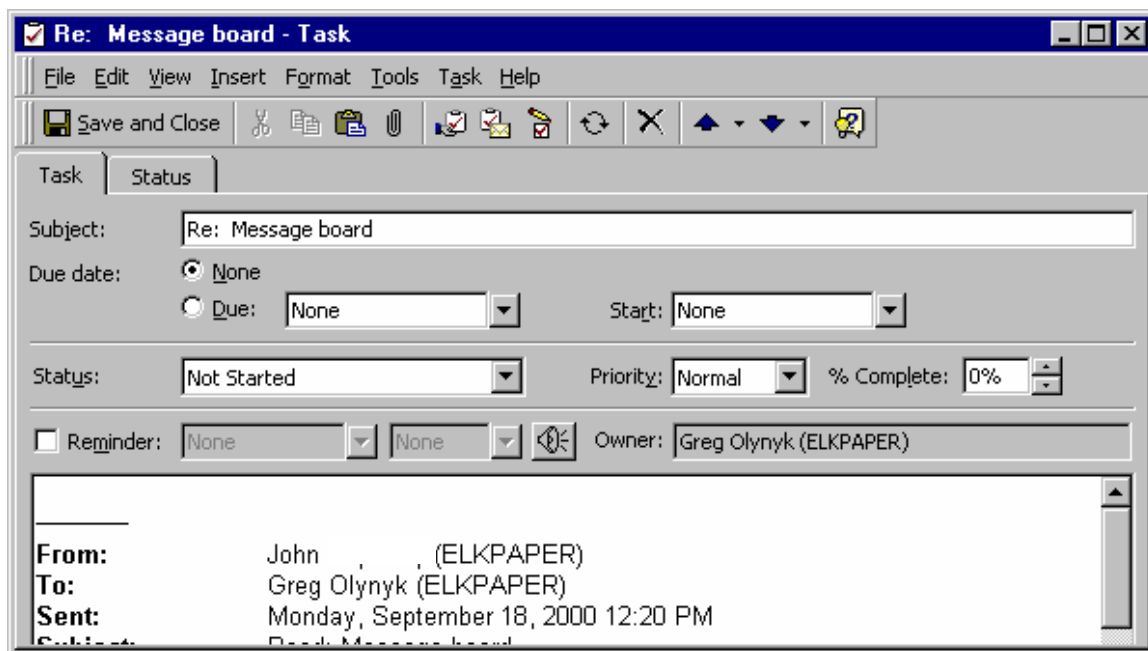
Subject	Location	Start	End	Recurr...	Cate..
President's Day	United...	Mon 2/...	Tue 2/1...	(none)	Holida
President's Day	United...	Mon 2/...	Tue 2/1...	(none)	Holida
President's Day	United...	Mon 2/...	Tue 2/2...	(none)	Holida
President's Day	United...	Mon 2/...	Tue 2/2...	(none)	Holida
President's Day	United...	Mon 2/...	Tue 2/1...	(none)	Holida
dentist		Wed 9/...	Wed 9/...	(none)	

### Adding a Task

Drag & Drop - email onto Task Icon

stores the message body as reminder of what the task concerns...

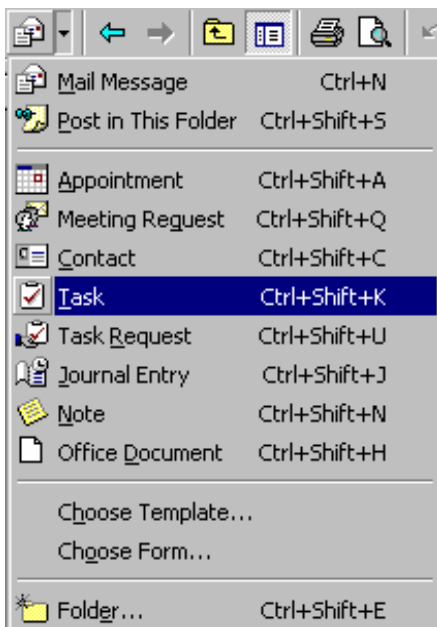
subject copied into task subject



Click Task Icon - New Icon



New Item Dropdown - Task



## Status

To record distance traveled (for example, for mileage reimbursement), type in the Mileage box.


## About task assignments

Task assignments help you keep track of progress on work that other people do for you or in cooperation with you on a project. For example, a manager might assign a task to an assistant, or an employee might assign a task to a coworker in a group effort. A task assignment requires at least two people: one to send a task request and another to respond to it.

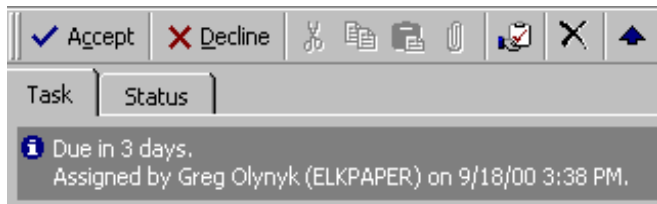
When you send a task request, you give up ownership of the task. You can keep an updated copy of the task in your task list and receive status reports, but you cannot change information such as the due date or percentage complete for the task.

When you receive a task request, you are the temporary owner of the task. You can accept the task, decline the task, or assign the task to someone else. If you accept the task, you become the new, permanent owner and are the only person who can make changes to the task. If you decline the task, the task is returned to the person who sent you the task request. If you assign the task to someone else, you can keep an updated copy in your task list and receive status reports, but ownership is transferred to the person you assign the task to.

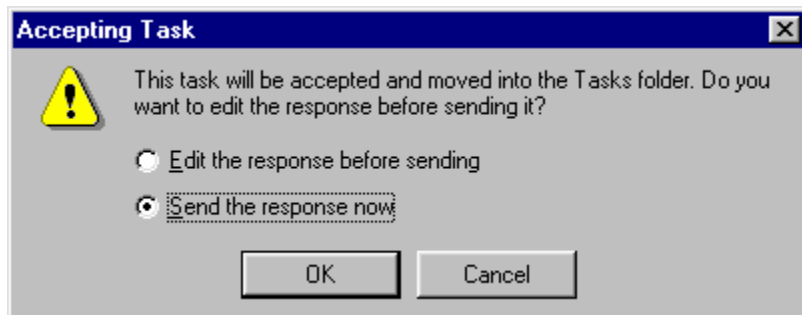
## Receive Task


 Greg Olynyk (ELKPAPER) Task Request: plan meeting 18-Sep-00  
 Subject: plan meeting  
 Due Date: Thursday, September 21, 2000  
 Status: Not Started

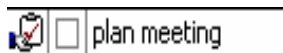
## Accept / Decline Task



## Response




## Assigned & Accepted Task



Send Status Report - Owner of task

## Planer receives update - opens


**Task Update: plan meeting**  
 Subject: plan meeting  
 Due Date: Thursday, September 21, 2000  
 Priority: High

*- updates the task...*

Subject: plan meeting  
 Due date: Due on 9/21/2000  
 Status: Waiting on someone else      Priority: High      % Complete: 50%