

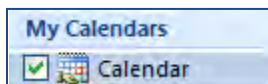
OUTLOOK 2007: **Calendar** MANAGEMENT TOOLS

SHARE YOUR CALENDAR INFORMATION WITH EVERYONE

You already know how to share your calendar with individuals, but what if you want to share your calendar with everyone at OHSU? You can easily set up your calendar permissions to give anyone at OHSU view-only rights to your calendar. *Calendar items **Marked Private** will not be visible to anyone but you (or those you give **Owner** rights to).*

Change calendar sharing permissions

1. In **Calendar**, in the left navigation pane, right-click the default **Calendar** folder. *NOTE: This is usually under **My Calendar**, and is displayed as **Calendar**.*



2. Click **Change Sharing Permissions...**
3. On the **Permissions** tab, in the **Name** box, select **Default**.
4. Under **Permissions**, in the **Permissions Level** list, select **Reviewer**. Reviewer permission gives anyone at OHSU *view-only* rights, with the exception of items marked private.

CREATE APPOINTMENTS FOR OTHERS WITHOUT PLACING THE APPOINTMENT ON MY CALENDAR

This setting allows the scheduler to:

- Add appointments to another person's calendar, and reschedule, update and cancel *only* appointments the scheduler has created.
- View the calendar owner's availability.

NOTE: The scheduler will not be able to see the appointments created by the calendar owner.

Steps for the calendar owner

1. Open your Outlook Calendar.
2. Right-click the calendar name in the **My Calendars** section on the left, and select **Change Sharing Permissions**.

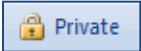
3. If the scheduler's name does not appear in the list of names, select **Add...** and locate the scheduler.
4. Select the scheduler's name.
5. Under *Read*, select **Free/Busy**.
6. Under *Write*, select **Create Items** and **Edit own**.
7. Under *Delete*, select **Own**.
8. Under *Other*, select **Folder Visible**.
9. Click **OK** to close the Permissions dialog box.

Steps for the scheduler

1. Open your Outlook Calendar.
2. Click **Open a Shared Calendar**.
3. Enter the calendar owner's name or click the **Name...** button to search for their name. Click **OK**.
*NOTE: In the Navigation pane, the scheduler will see the calendar owner's account name listed under **People's Calendars**.*
4. Click the **checkbox** to the left of the calendar owner's calendar. The owner's calendar appears to the right of the scheduler's calendar.
5. To hide the calendar, click the checkbox again.

MARK CALENDAR ITEMS PRIVATE

Have you given other people access to your calendar? Would you like to be able to mark an appointment so that the time was blocked out on your calendar, but only you could see the appointment details? Here's how:

1. Open an appointment. If it is a new appointment, enter the Subject, Location, etc.
2. On the **Appointment** tab, in the **Options** group, click **Private**. 
3. **Save and Close** the appointment. A padlock appears on the appointment.

NOTE: When someone views the appointment on your calendar, only the blocked time is visible. All other appointment information is hidden.

CREATE AND USE GROUP SCHEDULES

The Calendar group schedule makes it easy for you to see the combined schedules of a number of people or resources at a glance. You can create and use multiple group schedules. For example, one group schedule for everyone in your department; another group schedule for everyone on your project team; and another group schedule for all the conference rooms near you.

1. In **Calendar > Actions > View Group Schedules**

OR
Click the **View Group Schedules** icon on the Standard Calendar toolbar.

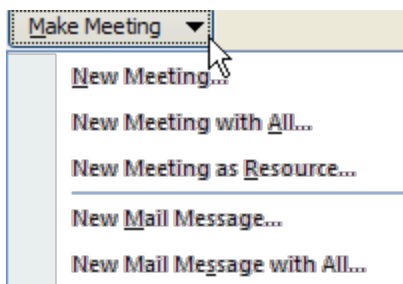


Create a group schedule

1. In the **Group Schedules** dialog box, click **New**.
2. Type a name for the new group schedule and click **OK**. The Scheduling Assistant appears.
3. Click **Add Others > Add from Address Book...**
4. Select the names that you want to add and click **OK**.
5. Click **Save and Close**.

View a group schedule

1. Select the group schedule you want to view, and then click **Open**.
 - a. To make a meeting or send an email to some or all group members, click the **Make a Meeting** button. A menu is displayed.
 - b. To schedule a meeting with all group members, select **New Meeting with All...**



- c. To send an email to all group members, select a time and select **New Mail Message with All...**
- d. To make a meeting with one group member, select a time on the member's schedule and select **New meeting...**

*NOTE: To schedule a meeting room or other resource, select **New Meeting as Resource...***

CREATE A GROUP SCHEDULE FROM AN EXISTING EMAIL GROUP

Copy names from email group

1. Open a new mail message.
2. In the **To:** text box, type the name of the email group. The email group appears.
3. Click the **+** sign to the left of the group name. The **Expand List** dialog box appears. *NOTE: If you previously checked the **Do not show this message again**, the Expand List dialog box does not appear.*
4. Click **OK**. All names from the group appear in the **To:** text box.
5. Click in the **To:** text box and press **CTRL-A** to copy all the names. *NOTE: There is a maximum of 30 names per group schedule. If your expanded list is more than 30 names, select and copy approximately 20 at a time (so you can add more if needed).*
6. Press **CTRL-C** to copy the names to the clipboard.

Create a group schedule

1. In Calendar, select **Actions > View Group Schedules** OR
Click the **View Group Schedules** icon on the Standard Calendar toolbar.
2. In the **Group Schedules** dialog box, click **New**.
3. Type a name for the new group schedule and click **OK**. The Scheduling Assistant appears.
4. Click **Add Others > Add from Address Book...**
5. Click in the **To ->** text box and press **CTRL-V** to paste the names.
6. Click **OK**.




See *Create and Use Group Schedules* for information on viewing a group schedule.

CREATE AND ASSIGN CATEGORIES

Categories allow you to easily identify and group associated items in Outlook. For example, you can keep track of all your meetings and messages for a project by using Categories.

Create a new category

1. On the toolbar, click the **Categorize** button. 
2. Select **All Categories**.
3. Select **New**. The **Add New Category** dialog box appears.
4. In the **Name** box, type a name for the new color category.
5. Click the arrow next to **Color** and select the color for the new category. Click **OK**. (See *Tips if you prefer not to use colors*.)

TIPS

- Choosing a shortcut key for commonly-used categories is optional.
- You can assign more than one category to an item.
- If you change a color that is already assigned to items, all assigned items for that category are updated to the new color.
- If you prefer to assign names, not colors, select **None** in the color palette. The category will apply the category name to the item, rather than a color.

Assign a category to an open calendar appointment or meeting request

For an open appointment:

1. On the **Appointment** tab or **Recurring Appointment** tab > **Options** group, click the **Categorize** button.
2. Select a category.

For an open meeting request:

1. On the **Meeting** tab or the **Recurring Meeting** tab > **Options** group, click the **Categorize** button.
2. Select a category.

Set up a quick click category

Setting a Quick Click category allows you to click only once in the Categories column of your inbox or calendar list view; for example, Active Appointments view.

This feature can be helpful if you are currently focusing on one project or responsibility, or for a “Follow-up” category.

1. On the toolbar, click the **Categorize** button.
2. In the **Set Quick Click** dialog box, select a category.

Assign a quick click category to an Item

Just one step: In your inbox or calendar list view, click the **Categories** column next to a message or calendar item.

CALENDAR VIEWS

You can view your calendar in a variety of ways. Go to **View > Current View** to change your calendar view. Further calendar view customization is located at **Tools > Options > Calendar Options**. Here are some of the views:

- **Day/Week/Month view** – Displays appointments by day, week, or month.
- **Active Appointments view** – Displays all appointments starting on or after the current day, grouped by frequency of recurrence. *If you are looking for a specific appointment or series of appointments, use this view and sort by subject.*
- **Events view** – Displays all-day events, grouped by frequency of recurrence. *With this view, you can deal with all the downtime notices at once.*
- **Recurring Appointments view** – Displays recurring appointments and events, grouped by frequency of recurrence.
- **By Category view** – Displays all calendar items grouped by category. Items assigned to multiple categories appear in each of the assigned category groups. *With this view, you can see all appointments for a specific project grouped together.*