Exercise 4

Skills Covered

- Navigate in the Calendar
- Change the Calendar View
- Schedule Calendar Items
- Schedule Recurring Calendar Items
- Set Reminders
- Print a Calendar

Software Skills Use the Calendar in Outlook to schedule appointments and events and to monitor your daily, weekly, or monthly schedule. You can set audible reminders for appointments and change the way the Calendar is displayed.

Application Skills As an account manager at Restoration Architecture, you have a very busy schedule. In this exercise, you will schedule appointments and add events to your Calendar, set appointment reminders, and change the way the Calendar is displayed. You will also print a weekly calendar.

TERMS

Work week Usually, Monday through Friday.

Filter Display only items that match specific criteria.

Group A set of items that have something in common. Also, to organize items into a group.

Appointment An item you schedule in the Calendar that does not involve inviting other people or reserving resources.

Event An item you schedule in the Calendar that lasts 24 hours or longer.

Meeting An appointment to which you invite other people.

Recurring An appointment or event that takes place at regular intervals.

NOTES

Navigate in the Calendar

- When you open the Outlook Calendar, the current view is Day/Week/Month.
- The current day's schedule is displayed divided into half-hour time slots. The Daily Task List displays at the bottom of the calendar so you can easily see tasks due on the current day.
- The current month is shown in the top portion of the Navigator Pane.
- Click any date in the month to display the schedule for that day; click the forward or back arrow to change the month.

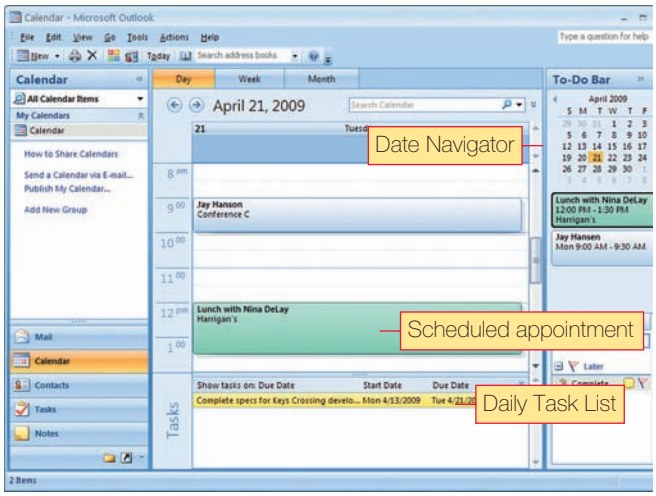
Change the Calendar View

- You can change the Calendar view to display the schedule for a **work week**, a seven-day week, or an entire month.
- Outlook also comes with built-in filters and groups that you can use to list items.
- For example, you can **filter** items to show only active appointments, or you can **group** items according to category.
- Select a filter from the Current View submenu.
- Select grouping options from the Arrange By submenu.
- You can show the Reading Pane in the Calendar in order to display details about the selected item.
- In Day/Week/Month view, you can show the To-Do-Bar.

- The To-Do Bar shows the Date Navigator, appointments, a task entry pane, and a list of tasks, as shown in the following illustration. When you show the To-Do Bar, the Date Navigator moves from the Navigator Pane to the top of the To-Do Bar.

  ✓ *You will work more with tasks in Exercise 5.*

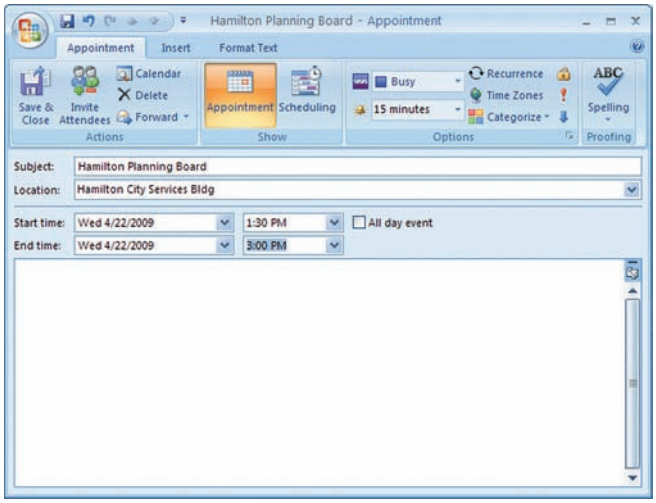
A daily schedule in Calendar



Schedule Calendar Items

- You can schedule an **appointment** in either of two ways:
  - Click on the calendar in the appropriate time or day and type the appointment information. When you type an appointment directly into a time slot, the appointment is scheduled for a half-hour. You can expand the appointment block if necessary.
  - For more control over the appointment options, or to schedule an **event** or a **meeting**, use the Appointment form shown in the following illustration.

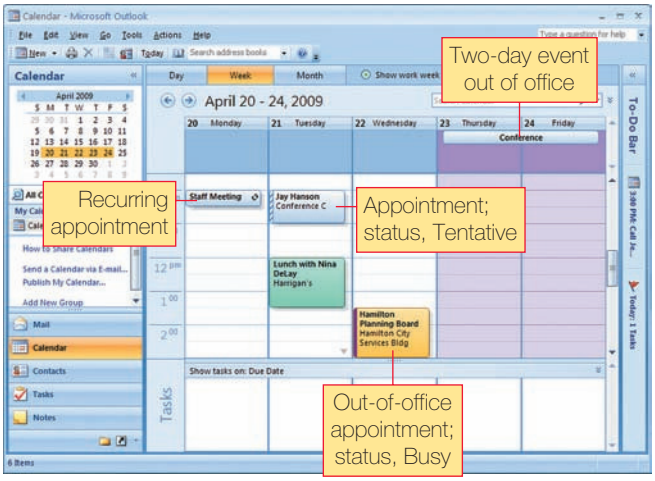
Appointment form



✓ *You schedule meetings by inviting contacts to an appointment.*

- To schedule an item, you enter a subject, which is the title that is displayed in the time slot on the calendar.
- You can also enter the duration, the location, a message, and availability status on the calendar display.
- Use a color category to categorize the appointment if desired. The category color shades the entire item on the calendar.
- Select an availability status to color code the item as Busy, Free, Tentative, or Out of Office.
- The availability status color is displayed as a border on the left side of the appointment block.
- Display options such as categories and availability status help you keep track of appointments, as shown in the following illustration.

A work week schedule

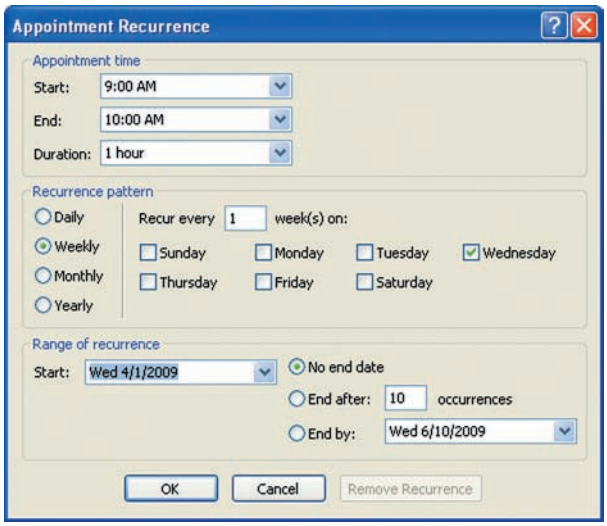


- Scheduled appointments also display on the To-Do Bar. This allows you to keep track of them while working in other Outlook components.
- Outlook displays warnings in the Appointment form if you try to schedule an item at the same time as an existing item, or in the past.
- You can delete calendar items, or move or copy them to a different time slot.

Schedule Recurring Calendar Items

- If a calendar item takes place at regular intervals, you can make it **recurring**.
- For example, if you have an appointment with your assistant every Monday at 10:00 a.m., you can schedule a recurring appointment instead of scheduling each week separately.
- Use the Appointment Recurrence dialog box, shown in the following illustration, to schedule a recurring item.

Appointment Recurrence dialog box



- You specify the time, subject and location, then select the recurrence pattern.
- The pattern includes the interval, which may be daily, weekly, monthly, or even yearly, and the frequency.
- The frequency options change depending on the interval.
  - For a daily interval, you can select every weekday, or enter the number of days between items.
  - For a weekly interval, you can select the day of the week and the number of weeks between items.
  - For a monthly interval, you can select the day of the month and the number of months between items.
  - For a yearly interval, you can select the month and the day of the month.
- You can also specify whether to cancel the recurrence after a certain length of time.
- When you work with a recurring item, you can work with a single occurrence or with the entire series.
- For example, you can copy, delete, or move this week's meeting from 11:00 a.m. to 11:30 a.m., or you can move all meetings in the series to 11:30 a.m.
- A recurrence icon is displayed on the schedule next to the subject information.

Set Reminders

- By default, all new calendar items have an audible reminder that sounds 15 minutes before the scheduled time.
- For each item, you can turn off the reminder or change the time frame.

Print a Calendar

- Print the calendar so you can retain a hard-copy record of the information.
- You can print a calendar that displays items, or you can print a blank calendar.
- By default, the calendar prints one day at a time, but you can select to print by weeks or months.
- You can also select the start and end date to include in the printout.
- Other print options include a tri-fold style, which prints in three columns, a calendar details style, which includes detailed information about each appointment, and a memo style, which you use to print information about selected appointments.
- To quickly print using the default settings, click the Print button on the Standard toolbar.
- To change settings, such as the format, or the number of copies, use the Print dialog box.
- Use Print Preview before printing to see how the information will look when printed.

PROCEDURES

Navigate in the Calendar

- Click a time slot to select it.

Move around the schedule:

- Use scroll commands to move up or down the schedule.
- Press ↑ to move up one time slot.
- Press ↓ to move down one time slot.
- Press PgUp to move up one screen.
- Press PgDn to move down one screen.

Change the displayed date:

1. Click **Forward** arrow ▶ on month in Date Navigator to display next month.

   OR

   Click **Back** arrow ◀ on month in Date Navigator to display previous month.
2. Click desired date on month ..... →, ←

   OR

1. Click **Go** ..... Alt+G
2. Click **Go To Date** ..... G
3. Click **Date** drop-down arrow ..... Alt+D
4. Click desired date to display.
5. Click **Show in** drop-down arrow ..... Alt+S+↓
6. Click desired calendar view ..... ↑, ↓
7. Click OK ..... ↵Enter

Display schedule for Today's date:

- Click **Go to Today** button Today.

  OR

1. Click **Go** ..... Alt+G
2. Click **Today** ..... O

Change the Calendar View

- Click desired view button at the top of the Calendar pane.
  - **Day** button Day.
  - **Week** button Week.

  ✓ *Select option Show work week or Show full week.*

  - **Month** button Month.

  OR

1. Click **View** ..... Alt+V
2. Click desired view option:
   - **Day** ..... D
   - **Work Week** ..... R
   - **Week** ..... W
   - **Month** ..... M

   ✓ *A checkmark next to the option indicates that it is already selected.*

Show/hide the To-Do Bar:

1. Click **View** ..... Alt+V
2. Click **To-Do Bar** ..... B
3. Click desired view option:
   - **Normal** ..... N
   - **Minimized** ..... M
   - **Off** ..... O

✓ *A checkmark next to the option indicates that it is already displayed.*

Arrange Items in groups:

1. Click **View** ..... Alt+V
2. Point to **Current View** V
3. Click desired view option.

Filter grouped items:

1. Click **View** ..... Alt+V
2. Click **Arrange By** ..... A

   ✓ *Arrange By displays on the View menu after you have grouped items using a Current View option.*

3. Click desired option to filter by.

Schedule an Appointment (Ctrl + Shift + A)

1. Click desired time slot.
2. Type appointment subject.
3. Press ↵Enter.

   OR

1. Click **New Appointment** button New.

   OR

   a. Click **File** ..... Alt+F
   b. Point to **New** ..... W
   c. Click **Appointment** ..... A
2. Click **Subject** text box ..... Alt+U
3. Type appointment subject.
4. Click **Location** text box ..... Alt+I
5. Type appointment location.

   ✓ *If available, you may select the location from the drop-down list.*

6. Click **Start time:** drop-down arrow.
7. Select desired date.
8. Press Tab⇆.
9. Select desired start time ..... ↑, ↓
10. Press Tab⇆ twice.
11. Select desired end time ..... ↑, ↓
12. If desired, click **Show As** drop-down arrow ..... Alt+H, B
13. Select desired option ..... ↑, ↓, ↵Enter
14. Click **Categorize** button ..... Alt+H, G
15. Select desired category color ..... ↑, ↓, ↵Enter
16. If desired, click message area and type message text.
17. Click **Save and Close** button ..... Alt+H, A, V

Schedule an Event (Ctrl + Shift + A)

1. Click **New Appointment** button New.

   OR

   a. Click **File** ..... Alt+F
   b. Point to **New** ..... W
   c. Click **Appointment** ..... A
2. Click **Subject** text box ..... Alt+U
3. Type event subject.
4. Click **Location** text box ..... Alt+I
5. Type event location.

   ✓ *If available, you may select the location from the drop-down list.*
6. Click **All day event** check box ..... Alt+V
7. Click **Start time:** drop-down arrow.
8. Select desired start date.
9. Click **End time:** drop-down arrow.
10. Select desired end date

    ✓ *For a one-day event, this will be the same as the start date.*
11. If desired, click **Show As** drop-down arrow ..... Alt+H, B
12. Select desired option ..... ↑, ↓, ↵Enter
13. Click **Categorize** button ..... Alt+H, G
14. Select desired category color ..... ↑, ↓, ↵Enter
15. If desired, click message area and type message text.
16. Click **Save and Close** button ..... Alt+H, A, V

Open an existing Calendar item:

- Double-click item in schedule.

Delete Calendar items (Ctrl + D):

1. Select item(s) to delete.
2. Click **Delete** button ✕ on Standard toolbar.

   OR

   a. Click **Edit** ..... Alt+E
   b. Click **Delete** ..... D

Move Calendar items (Ctrl + Shift + V):

1. Select item(s) to move.
2. Drag item to new time slot.

   OR

1. Click **Edit** ..... Alt+E
2. Click **Cut** ..... T
3. Select destination time slot ..... ↑, ↓
4. Click **Edit** ..... Alt+E
5. Click **Paste** ..... P

Copy Calendar items:

1. Select item(s) to copy.
2. Press and hold Ctrl.
3. Drag item to new time slot.

   OR

1. Click **Edit** ..... Alt+E
2. Click **Copy** C
3. Select destination time slot ..... ↑, ↓
4. Click **Edit** ..... Alt+E
5. Click **Paste** ..... P

Schedule a Recurring Calendar Item

1. Create a new calendar item in Appointment form or open an existing item.

   Options Group
2. Click **Recurrence** button ..... Alt+H, E
3. Click **Start** drop-down arrow ..... Alt+T, ↓
4. Select desired start time ..... ↑, ↓, ↵Enter
5. Click **End** drop-down arrow ..... Alt+N, ↓
6. Select desired end time ..... ↑, ↓, ↵Enter
7. Click **Duration** drop-down arrow ..... Alt+U, ↓
8. Select duration time ..... ↑, ↓, ↵Enter
9. Select recurrence interval option:
   - **Daily** ..... Alt+D
   - **Weekly** ..... Alt+W
   - **Monthly** ..... Alt+M
   - **Yearly** ..... Alt+Y
10. Select additional recurrence options as necessary.

    ✓ *The options will vary depending on the selected recurrence interval.*
11. Click **Start** drop-down arrow.
12. Select start date.
13. Select desired end date options:
    - **No end date** ..... Alt+O
    - **End after** ..... Alt+F

      ✓ *If you select this option, you must enter the number of occurrences.*
    - **End by** ..... Alt+B

      ✓ *If you select this option you must select the end date.*
14. Click OK ..... ↵Enter
15. Select additional appointment options as necessary.
16. Click **Save and Close** button ..... Alt+H, A, V

Set a Reminder

1. Create a new calendar item in the Appointment form or open an existing item.

   Options Group
2. Click **Reminder** drop-down arrow ..... Alt+H, Q, ↓
3. Select length of time prior to start time you want reminder to sound ..... ↑, ↓, ↵Enter

   ✓ *Select None on the Reminder list if you do not wish to receive a reminder.*

Print a Calendar

1. Select item(s) to print.
2. Click **Print** button to print item using default settings.

OR

1. Click **File** ..... Alt+F
2. Click **Print** ..... P
3. Click desired **Print style** ..... Alt+Y, ↑, ↓
   - **Daily Style**
   - **Weekly Style**
   - **Monthly Style**
   - **Tri-fold Style**
   - **Calendar Details Style**
   - **Memo Style** (this option is available only if items are selected)
4. Click **Start** box ..... Alt+S
5. Enter first date to print.
6. Click **End** box ..... Alt+E
7. Enter last date to print.
8. If desired, click **Hide details of private appointments** check box ..... Alt+H
9. Click OK ..... ↵Enter

EXERCISE DIRECTIONS

1. Start Outlook 2007.
2. Change to the Calendar component.
3. Display the To-Do Bar, if necessary.
4. Minimize the To-Do Bar.
5. Turn off the Reading Pane if it is displayed.
6. Display the Calendar in Work Week view.
7. Display the Calendar in Month view.
8. Display the Calendar in Week view.
9. Display the Calendar in Day view.
10. Change the day to Monday, March 9, 2009.
11. Select the 12:00 p.m. time slot.
12. Create a new appointment as follows:
    Subject: **Lunch with client**
    Location: **Vic's**
    Category: **Red Group,** and rename group to **Business**
    Start time: **12:00 p.m.**
    End time: **1:30 p.m.**
    Reminder: **10 minutes**
    Show time as: **Tentative**
13. Save and close the appointment.
14. Change the day to the following Thursday.
15. Create a new one-day event as follows:
    Subject: **Design Conference**
    Location: **Downtown Hotel**
    No category
    No reminder
    Show time as: **Out of Office**
    Message: **Important conference for client contacts**
16. Save and close the event.
17. Change the day to the following Friday.
18. Create a new recurring appointment as follows:
    Subject: **Weekly Review**
    Location: **My Office**
    Recurrence pattern: **Weekly, every Friday at 3:00 p.m., 30 minute duration, with no end date**
    Reminder: **5 minutes**
    Show time as: **Busy**
19. Save and close the appointment.
20. Change to Week view and show the work week.
21. Select the lunch appointment on Monday.
22. Move the appointment to the same time slot on Tuesday. The Calendar should look similar to the one in Illustration A.
23. Print the calendar in the Weekly style.
24. Exit Outlook.

Curriculum Connection: Social Studies

Calendars

The familiar twelve-month calendar we use today is called the Gregorian calendar. However, there have been other calendars over the years, including the Julian calendar, developed by Julius Caesar, the Roman calendar, and the Mayan calendar. There are even other calendars still in use today, such as the Chinese calendar, the Jewish calendar, and the Indian calendar. Most are used to track traditional holidays, such as the Chinese New Year, or the Jewish festivals.

Convert Important Dates

Research calendars that have been used over the ages. See if you can convert dates from a different calendar to dates on the modern Gregorian calendar. For example, can you determine when Chinese New Year will fall on the Gregorian calendar this year? Or can you figure out when your birthday would fall this year on the Chinese calendar? Enter the dates on your Outlook calendar.

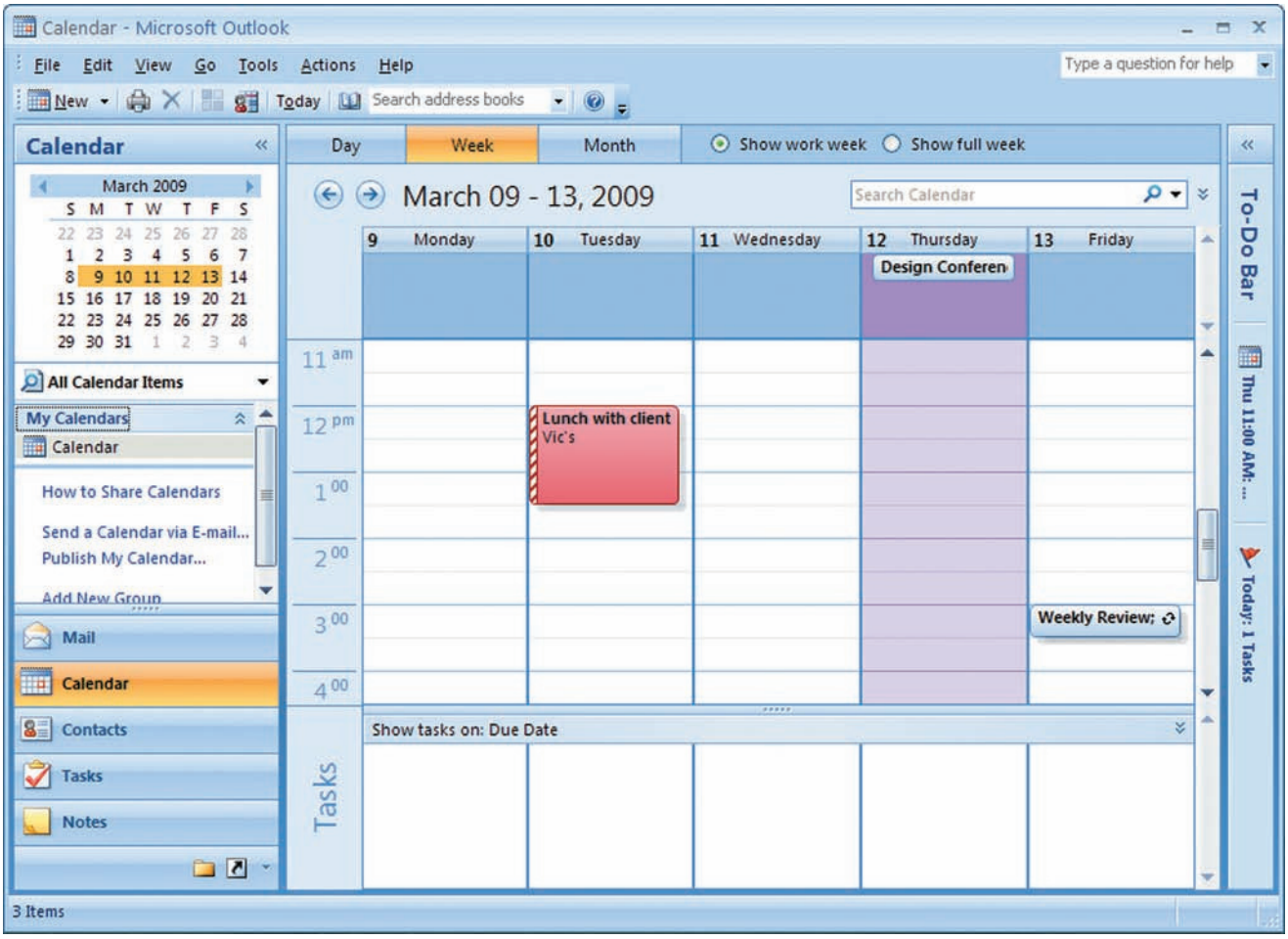



Illustration A