CALENDAR BEST PRACTICES: OUTLOOK 2013

Create a Meeting or Daily Note

Failure to create a meeting properly can lead to confusion.
Be sure to follow these Best Practices.

Creating a meeting improperly can lead to confusion. Be sure to follow these Best Practices

- To add attendees to a meeting that you created, you can choose to send the updated meeting information to all attendees OR to the newly added attendees only. If you send to the newly added attendees only, the original attendees will NOT see the new attendees when they view the meeting through the Scheduling Assistant.
- If you are scheduling a large meeting and do not want to be inundated with meeting responses, turn off the “Request Response” option BEFORE you send the meeting request. Remember that by turning off the “Request Response” option, you will NOT be able to see who accepts the meetings.
- If you cancel a meeting, send an email notification.
- If you’ve scheduled a recurring meeting and one of the attendees is no longer affiliated with the university, you can simply remove that person from the meetings. However, if you wish to have their presence recorded on past meetings for historical purposes, follow these steps:
  1. Open the recurring meeting and change the end date to match the last date of the attendee’s employment at the university
  2. Send a meeting update to all attendees
  3. Create a new recurring meeting from this point forward and invite all remaining employees to the meeting.

Steps to Create a Meeting

1. Click Calendar to access your calendar.
2. Click Home > New Meeting.
3. In the Subject field, enter a subject; enter meeting details in the message body.
4. Click Scheduling Assistant.
5. Click Address Book. The Global Address List appears.
6. Select the individuals, room or equipment that you want to include and, after each, click Required, Optional or Resources to add them to your meeting.
   Note: To include a list of people use either an Exchange Distribution Group, a group within your own contacts folder, or a group in the Contacts folder of an Exchange Shared Mailbox.
7. Click OK to close the Address Book window.
8. In the Scheduling Assistant, view everyone’s availability and check for conflicts.
   - If you sent the message to a group, be sure to click the “*” to view their availability and enable Outlook to track their responses.
   - If a resource is reserved, it will display as busy. In the bottom right corner of the screen display, the Suggested Times box suggests alternate meeting times. Be sure to read the response email from the room to verify if it has accepted or declined.
9. Click Send.

Using Daily Notes (a.k.a. “Events,” All-Day Events, etc.)

To add a Daily Note to your own calendar:

1. Create a new appointment and check the “All Day Event” checkbox.
2. Select the appropriate option to show your time as “busy” or “free.”

NOTE: To add a Daily Note to someone else’s calendar (e.g., a note to coworkers that you will be out that day), be sure to show the time on their calendar as “free.” If you want to mark that time as busy on your own calendar, you will need to add a separate event.
We can help! Use these shortcuts for Office of Information Technology assistance:

24/7 Info & Work Requests :: www ohio edu/oitech :: IT-related trouble reports, assistance requests
Password Changes :: www ohio edu/ohiopassword :: Help with password changes and account security
Network Registration (NetReg) :: www ohio edu/netreg :: More details and FAQs about NetReg
Email Help & Forwarding :: www ohio edu/email :: Help with Catmail, email forwarding, and Exchange
Blackboard Assistance :: www ohio edu/blackboard :: Extensive help files for using Blackboard
Software Sales & Licenses :: www ohio edu/software :: Downloadable software and software sales
Bobcat Depot :: (597-DEPO) www ohio edu/techdepot :: Walk-Up tech assistance and sales in Baker Center