

SCHEDULING MEETINGS

With Outlook, it is possible to schedule meetings and invite attendees. There is an availability feature that allows you to select a date and time that is convenient for all attendees. When an attendee from within the organization is invited to the meeting, it is possible to automatically see their Outlook Calendar information. To see free/busy information from attendees outside of the organization, they have to make the Calendar available over the Internet.

It is possible to indicate whether the attendance at the meeting is required or optional. You can also let Outlook select the meeting time.

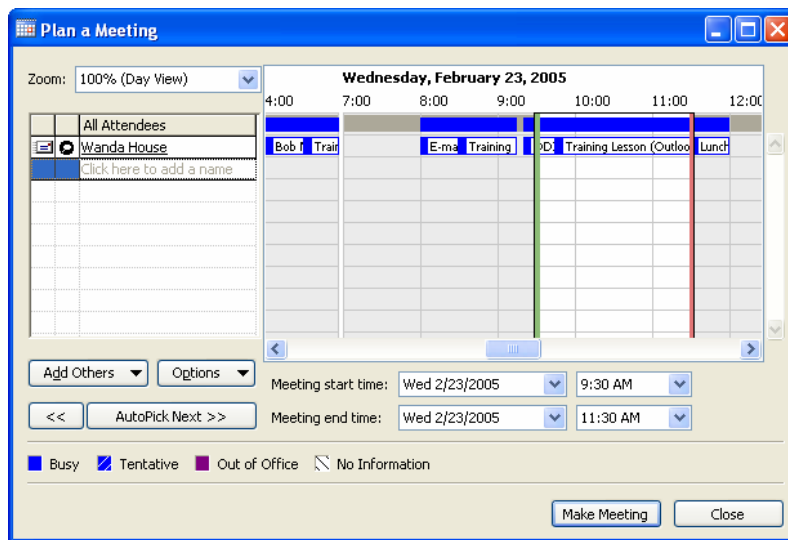
After a time has been selected, a meeting request can be sent to each attendee inviting them to the meeting. The invited attendee can send a response indicating whether or not they are able to attend the meeting at the time it is scheduled. Outlook allows you to keep track of the responses from the invitees.

SCHEDULING A MEETING (GROUP MEETINGS)

When you choose the invitees for a Group Meeting, you need to make sure that you use the **Global Address Book** rather than your Personal Address Book.

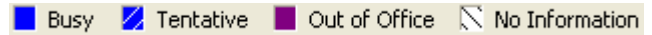
- ✦ Switch to the **Calendar** option.
- ✦ Do one of the following:
 - ✦ Click **Actions** on the **Menu Bar** and then click **Plan a Meeting**.
 - ✦ Click the **Plan a Meeting** button on the **Advanced** toolbar.
- ✦ The **Plan a Meeting** dialog box will appear (see illustration).
- ✦ Your name will appear in the **All Attendees** list.
- ✦ Do one of the following to add additional people to invite to the meeting:
 - ✦ Under your name, click the option **Click here to add a name**.
 - ✦ Input the name of the person who you want to attend the meeting.
 - ✦ That person's name will have to be in the **Address Book** in order for this to work.
 - ✦ For a list of the members of the organization, it is best to use the **Global Address Book**.
 - ✦ Click the symbol next to the person's name.
 - ✦ A drop-down menu will appear.
 - ✦ Choose one of the options from the list. These options are:
 - Required Attendee
 - Optional Attendee
 - Resource (Room or Equipment)
 - The default is **Required Attendee**.

or



- ✦ Click **Add Others**
- ✦ Click **Add from Address Book**.
- ✦ In the **Type name or select from list** box, enter the name of a person you want to invite to the meeting.
- ✦ For each name entered, click one of the buttons: **Required**, **Optional**, or **Resources**.

✦ The status of the invitee will be highlighted in one of the colors shown in the illustration at the right.



- ✦ The **No Information** status would indicate that the person is not an Exchange client or that they are not using the Calendar feature in Outlook.
- ✦ The **green** line indicates the beginning time of the appointment.
- ✦ The **red** line indicates the ending time of the appointment.
- ✦ To locate additional times when the all invitees are available, click the **AutoPick Next** button to locate the next available time for all invitees.

✦ Click **Make Meeting**.

✦ The dialog box at the right will appear.

✦ The names of the **Invitees** will appear in the **To** box.

✦ In the **Subject** box, type a description of the meeting.

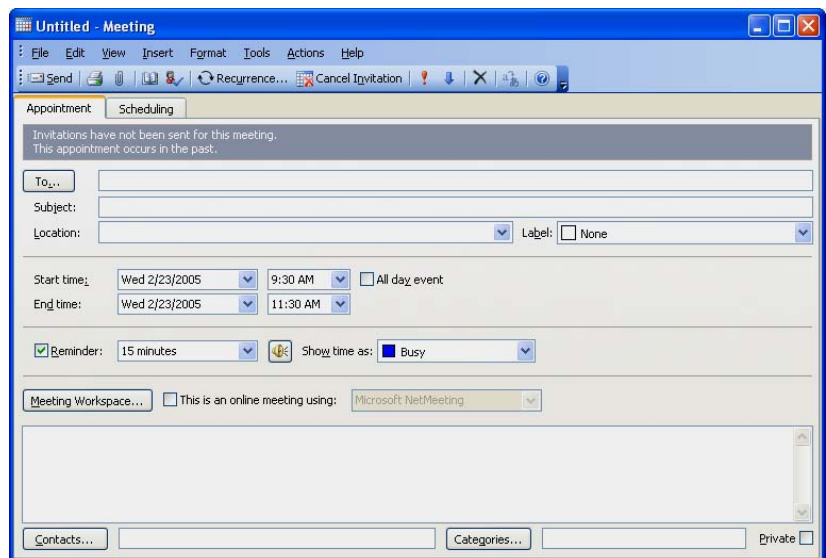
✦ Enter the location for the meeting in the **Location** box.

✦ To make the meeting recurring, click the **Recurrence** button and select a recurrence pattern.

✦ Information on scheduling recurring meetings appears earlier in this document.

✦ Select any other desired options.

✦ To add additional invitees or to change the time, click the **Scheduling** tab.



✦ Click **Send**.

✦ Click the **Close** button in the **Plan a Meeting** dialog box.

✦ The scheduled meeting should appear in your calendar.

✦ The meeting icon (next to the Subject) will distinguish this entry from an appointment (see illustration at right).

✦ A bell icon next to the time would indicate that a reminder was set for the appointment.

✦ To make any changes to the meeting information, or to see who has responded, open the appointment.

✦ A new tab will be displayed in the meeting record called Tracking.

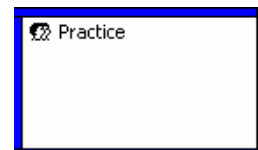
✦ Click this tab to find out the status of the responses for the meeting.

Notes:

✦ To send agendas or meeting minutes, attach a file to the meeting request.

✦ To prevent the recipients from sending a response:

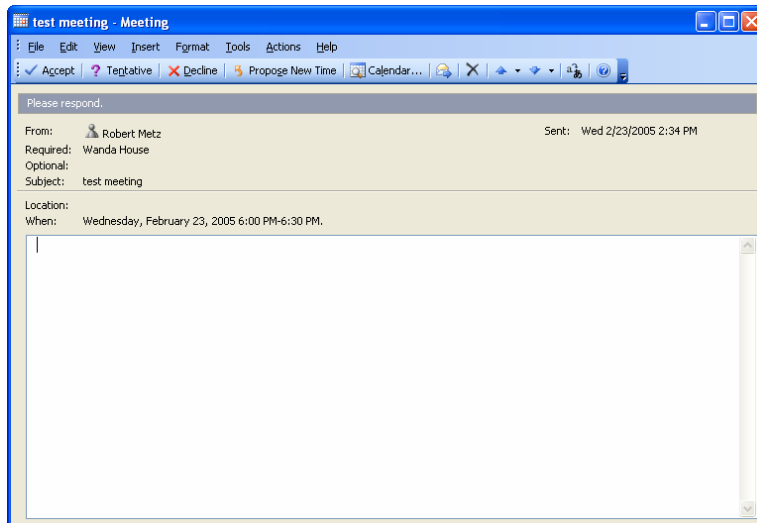
- ✦ In the Meeting Request, click the **Actions** menu.
- ✦ Click **Request Responses** to clear the check box next to it.



RESPONDING TO A MEETING REQUEST

When you are invited to a meeting, a message will appear in your Inbox with a Meeting Request icon next to it.

- ✦ Switch to the **Inbox** in Outlook.
- ✦ Select the **Meeting Request** message.
- ✦ A **Meeting Request** icon will appear next to the message (see illustration).
- ✦ Double-click on the message to open it.
- ✦ The dialog box at the right will appear.
- ✦ Key in a message to the invitee before sending the response, if desired.
- ✦ Click one of the options below for this meeting request.
 - ✦ Click **Accept** to approve the meeting time.
 - ✦ Click **Tentative** if you are not positive about whether or not you will be able to attend.
 - ✦ Click **Decline** to indicate that you will not be able to attend the meeting.
 - ✦ Click **Propose New Time** if you feel a different meeting time would be more convenient for you.



- ✦ Before making a decision about whether or not to **Accept** or **Decline** the meeting request, it is possible to check your Calendar by clicking the Calendar icon (see illustration).
- ✦ After looking at the Calendar, click the **Close** button to return to the dialog box.
- ✦ When one of the first three options is chosen, the dialog box at the right will appear.
- ✦ Choose one of the responses and then click **OK**.
- ✦ Select one of the options that appear in the middle of the message window.
- ✦ Once a reply has been sent, Outlook updates your Calendar by inserting the meeting time and date.

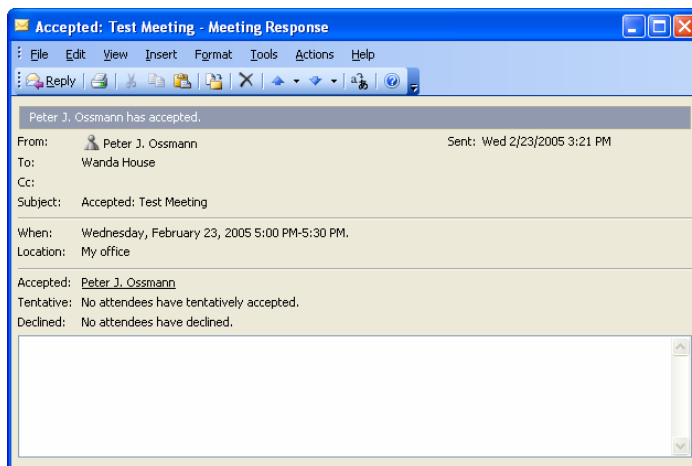


REVIEWING AND CHANGING MEETING DETAILS

Once a meeting has been created, the meeting organizer should receive replies. As these replies are received, Outlook compiles the responses. A summary of responses is displayed in the Meeting window under the Tracking tab.

- ✦ To check for any responses, click your **Inbox**.
- ✦ Click on the message
- ✦ Once a response is received, the dialog box on the next page will display.
- ✦ Switch to the **Calendar**.

- ✦ Double-click the appointment that is to be reviewed.
- ✦ In the **Information Bar** on the **Appointment** tab, a message will appear regarding whether anyone has responded to the meeting request.
- ✦ The **Scheduling** tab is similar to the **Meeting** window.
- ✦ Click the **Tracking** tab to view the status of the responses.
- ✦ In the **Response** column for the **Invitee**, the entry should indicate what the response was, such as Accepted.



ADDING OR REMOVING ATTENDEES

It is a very simple process to remove attendees from a meeting request. To do so:

- ✦ Open the **Meeting** in the **Calendar**.
- ✦ Click the **Actions** option on the **Menu Bar**.
- ✦ Click the **Add or Remove Attendees** option.
- ✦ The **Meeting Request** dialog box will appear.
- ✦ Click on the **Schedule** or **Tracking** tab.
- ✦ Click the attendees name in the list.
- ✦ Press the **Delete** key on the keyboard.
- ✦ The message at the right will display.
- ✦ Click one of the options:
 - ✦ Send cancellation and delete meeting.
 - ✦ Delete without sending a cancellation.
- ✦ If the first option is selected, a message will appear in your Inbox.

