

Get familiar with the Outlook Calendar

Quick Reference Card

Navigate to your calendar

- In the Navigation Pane, click **Calendar** to go to your calendar.

Note To display the Navigation Pane, click the **View** tab, go to the **Layout** group and click **Navigation Pane**, and then click **Normal**.

Create an appointment

1. In **Calendar**, on the **Home** tab, in the **New** group, click **New Appointment**. Alternately, you can right-click a time block in your calendar grid and click **New Appointment**.



Keyboard shortcut To create an appointment, press CTRL+SHIFT+A.

2. In the **Subject** box, type a description.
3. In the **Location** box, type the location.
4. Enter the start and end times.

Tip You can type specific words and phrases in the Start time and End time boxes instead of dates. For example, you can type Today, Tomorrow, New Year's Day, Two Weeks from Tomorrow, Three days before New Year's Day, and most holiday names.

5. To show others your availability during this time, on the **Appointment** tab, in the **Options** group, click the **Show As** box and then click **Free**, **Tentative**, **Busy** or **Out of Office**.
6. To make the appointment recurring, on the **Appointment** tab, in the **Options** group, click **Recurrence** . Click the frequency (**Daily**, **Weekly**, **Monthly**, **Yearly**) with which the appointment recurs, and then select options for the frequency. Click **OK**.

Note Adding a recurrence to an appointment changes the **Appointment** tab to say **Recurring Appointment**.

7. By default, a reminder appears 15 minutes before the appointment start time. To change when the reminder appears, on the **Appointment** tab, in the **Options** group, click the **Reminder** box arrow and then click the new reminder time. To turn the reminder off, click **None**.
8. On the **Appointment** tab, in the **Actions** group, click **Save & Close**.

Note Double-click any blank area on the calendar grid to create a new appointment.

Change an appointment

1. Open the appointment that you want to change.
2. Do one of the following:
 - **Change options for an appointment that is not part of a series**
 - Change the options, such as subject, location, and time, that you want to change.
 - **Change options for all appointments in a series**
 1. Click **Open the series**, and then change any options that you want to change.
 2. To change recurrence options, on the **Recurring Appointment** tab, in the **Options** group, click **Recurrence**, change the options and then click **OK**.
 - **Change options for one appointment that is part of a series**
 1. Click **Open this occurrence**.
 2. On the **Recurring Appointment** tab, change the options that you want.
1. On the **Appointment** or **Recurring Appointment** tab, in the **Actions** group, click **Save & Close**.

Tip In **Calendar**, you can drag the appointment to a different date. You also can edit the subject by clicking the description text, pressing F2, and then typing your changes.

Make an existing appointment recurring

1. Open the appointment that you want to set to recur.
2. On the **Appointment** tab, in the **Options** group, click **Recurrence** .
3. Click the frequency — **Daily**, **Weekly**, **Monthly**, **Yearly** — with which you want the appointment to recur, and then select the options for the frequency.
4. On the **Recurring Appointment** tab, in the **Actions** group, click **Save & Close**.

Create a meeting when using an Exchange Server Account

1. In **Calendar**, on the **Home** tab, in the **New** group, click **New Meeting**.



Keyboard shortcut To create a new meeting request, press CTRL+SHIFT+Q.

2. In the **Subject** box, type a description.

3. In the **Location** box, type a description or location. If you use a Microsoft Exchange account, click **Rooms** to choose from available rooms.
4. In the **Start time** and **End time** lists, click the start and end time for the meeting. If you select the **All day event** check box, the event shows as a full 24-hour event, lasting from midnight to midnight.

Note If you want to schedule meetings based on an alternate time zone, on the **Meeting** tab, in the **Options** group, click **Time Zones**.

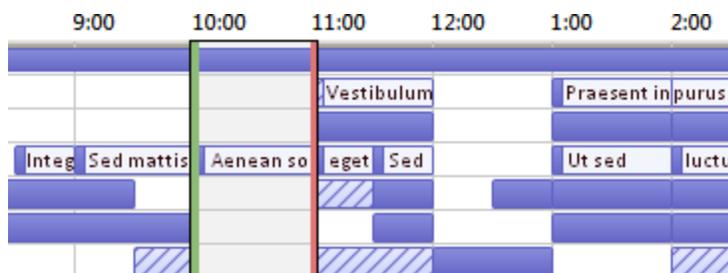
5. In the meeting request body, type any information that you want to share with the recipients. You can also attach files.
6. On the **Meeting** tab, in the **Show** group, click **Scheduling Assistant**.

The **Scheduling Assistant** helps you find the best time for your meeting.

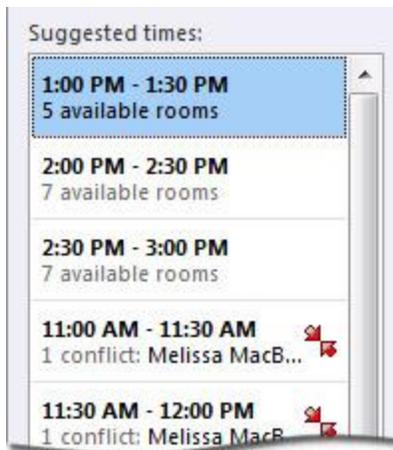
7. Click **Add Others**, and then click **Add from Address Book**.
8. In the **Select Attendees and Resources** dialog box, in the **Search** box, enter the name of a person or resource to include at the meeting. If you are searching with the **More Columns** option, click **Go**.
9. Click the name from the results list, then click **Required**, **Optional**, or **Resources**, and then click **OK**.

Required and **Optional** attendees appear in the **To** box on the **Meeting** tab, and **Resources** appear in the **Location** box.

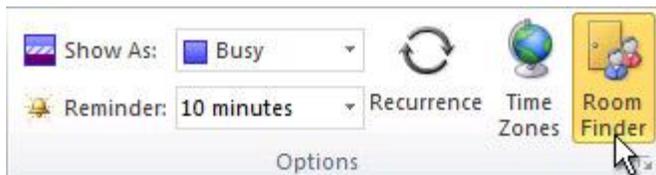
The free/busy grid shows the availability of attendees. A green vertical line represents the start of the meeting. A red vertical line represents the end of the meeting.



The **Room Finder** pane contains suggested times for the best time for your meeting (when most attendees are available). To select a meeting time, click a time suggestion in the **Room Finder** pane in the **Suggested times** section, or pick a time on the free/busy grid.



Note If the **Room Finder** pane doesn't appear, on the **Meeting** tab, in the **Options** group, click **Room Finder**.



10. To set up a recurring meeting, on the **Meeting** tab, in the **Options** group, click **Recurrence**. Choose the options for the recurrence pattern you want, and then click **OK**.

When you add a recurrence pattern to a meeting request, the **Meeting** tab changes to **Recurring Meeting**.

Note To change the advance time of the meeting reminder, on the **Meeting** tab, in the **Options** group, click **Reminder**, and then click the time you want. Click **None** to turn off the reminder.

The organizer can also set the reminder time for recipients by changing the reminder time on the meeting invitation. If the organizer does not change the default reminder time on the invitation, the recipients will each use their own default reminders.

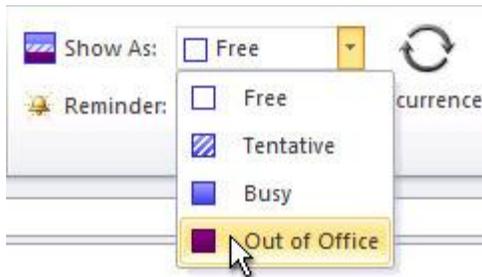
Create an appointment without an Exchange Server account

1. Follow steps 1-5 in the previous section.
2. When you finish creating the meeting and adding any notes or attachments, click **Send**.

Create an all-day event

1. In **Calendar**, on the **Home** tab, in the **New** group, click **New Items**, and then click **All Day Event**.
2. In the **Subject** box, type a description.
3. In the **Location** box, enter the location.

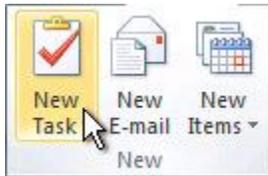
4. To indicate to people who are viewing your calendar that you are out of office instead of free, on the **Event** tab, in the **Options** group, click **Out of Office** in the **Show As** list.



5. If the event lasts longer than one day, change the values in the **Start time** and **End time** boxes.
6. Click **Save and Close**.

Create a task

1. In **Tasks**, on the **Home** tab, in the **New** group, click **New Task**.



Keyboard shortcut To create a new task, press CTRL+SHIFT+K.

2. In the **Subject** box, type a name for the task. You can add more detail in the task body.
3. On the **Task** tab, in the **Actions** group, click **Save & Close**.

Create a task from an Outlook item

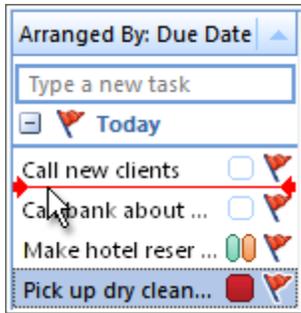
You can create a task out of any Outlook item, such as e-mail message, contact, calendar item, or note.

Do one of the following:

- Drag an e-mail message to the To-Do Bar

The To-Do Bar must be arranged by **Start Date** or **Due date** to use these procedures.

1. Drag the item to the task list section of the To-Do Bar.
2. When you see a red line with arrows at each end positioned where you want to put the task, release the mouse button.



- Drag an item to Tasks

When you drag an item to **Tasks** in the Navigation Pane, you can use all the features of a task item. The contents of the item, except attachments, are copied to the body of the task. Even if the original item is later deleted, the task is still available, including the copied contents of the item

- Drag the item to the **Tasks** tab on the Navigation Pane.

Tip To add the item as an attachment to the task instead of pasting the text into the task body, right-click the item and drag it to the task list, and then click **Copy Here as Task with Attachment**.

Create a task in the To-Do Bar

The To-Do Bar appears in all Outlook views by default.

To create a task, do one of the following:

- In the To-Do Bar, click the **Type a new task** box, and then enter the task description. Press ENTER to finish. The task appears in your To-Do list with today's date.
- In the To-Do Bar, double-click the **Type a new task** box to open a task in a new window. You can enter more detail about the task.

Tip To turn on or off the To-Do Bar, on the **View** tab, in the **Layout** group, click **To-Do Bar** and click **Normal**, **Minimized**, or **Off**. This changes the To-Do Bar only in the current view, not in all views.

Create a task in the Daily Task List in Calendar

The Daily Task List appears only in the Outlook Calendar day and week views.



1. Rest your pointer in the Daily Task List under the day that you want.

2. Click **Click to add task**.
3. Type a subject for the task, and then press ENTER.

By default, the start and due dates are set for the day under which you inserted the task. To change the start date or due date of the task, drag the task to the day that you want. To manually change the start or due date, right-click the task and then click **Open**.

Note To turn on or off the Daily Task List, in Calendar, on the **View** tab, in the **Layout** group, click Daily Task List, and then select **Normal**, **Minimized**, or **Off**.

Apply color categories

1. In the calendar grid, click an item.
-or-
In the To-Do Bar or Daily Task list, click an item. You can also click **Tasks** in the Navigation Pane to display your tasks.
2. On the tab that appears when you select the item, click **Categorize**.
Tip That tab that appears varies with the type of item you select. For example, if you click **Tasks** in the Navigation Pane, the **Home** tab appears, but if you click a task in the To-Do Bar, the **Task List** tab appears. Those various tabs all provide the **Categorize** command.
3. Click **Categorize**, then click the category you want to apply.

Set a Quick-Click category

1. In the calendar grid, click an item.
-or-
In the To-Do Bar or Daily Task list, click an item. You can also click **Tasks** in the Navigation Pane to display your tasks.
2. On the tab that appears when you select the item, click **Categorize**.
Tip That tab that appears varies with the type of item you select. For example, if you click **Tasks** in the Navigation Pane, the **Home** tab appears, but if you click a task in the To-Do Bar, the **Task List** tab appears. Those various tabs all provide the **Categorize** command.
3. Click **Categorize**, and then click **Set Quick Click**.
4. Select a category from the list, then click **OK**.