**6**

# Keeping Track Of Appointments and Other Big (Or Small) Events

Many people use Outlook to manage their schedule, to keep track of appointments, birthdays, holidays, meetings, and other events. Outlook includes holidays for many countries, and you can easily add your own. You can also add your own meetings and appointments, and you can have Outlook remind you about them ahead of time. When you use Outlook with Exchange Server, you can easily see others' schedules and organize group meetings.

This chapter explains how to use the Calendar folder in Outlook to manage your schedule.

# A Quick Tour of the Calendar Folder

You use Outlook's Calendar folder (see Figure 6.1) to manage appointments and other events. When you open the Calendar folder, the Navigation pane shows the *date navigator*, which is just a small calendar that you can use to select a month or day.

**FIGURE 6.1**

The Calendar folder's Day view shows a single day.
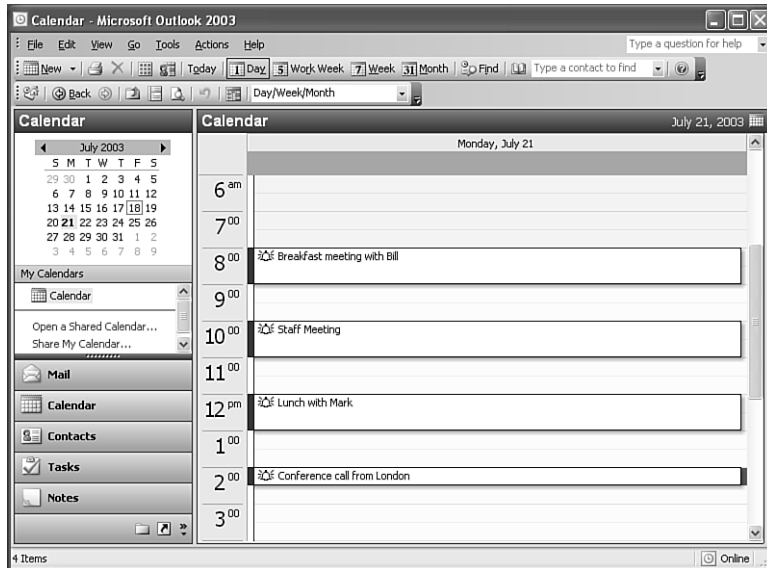


Like the other Outlook folders, the Calendar folder includes several predefined views, and you can also create your own. Figure 6.1 shows the Day view, and Figure 6.2 shows the Month view. You choose View, Arrange By, Current View to select a different view. You can also click the Today, Day, Work Week, Week, or Month buttons on the toolbar to open views.

The appointments and other events that you have added to your schedule appear in the Calendar folder on their assigned days. Events that span more than one day (such as conferences or vacations) span the appropriate days on the calendar. The Calendar folder also shows events that it has added, such as holidays.

⇨ See the section "Creating Custom Views" in Chapter 8, "Outlook Settings to Change," to learn how to create your own views of the Calendar.

The next section explains how to use the Calendar folder to add and work with appointments.

**FIGURE 6.2**

The Calendar folder's Month view shows an entire month.
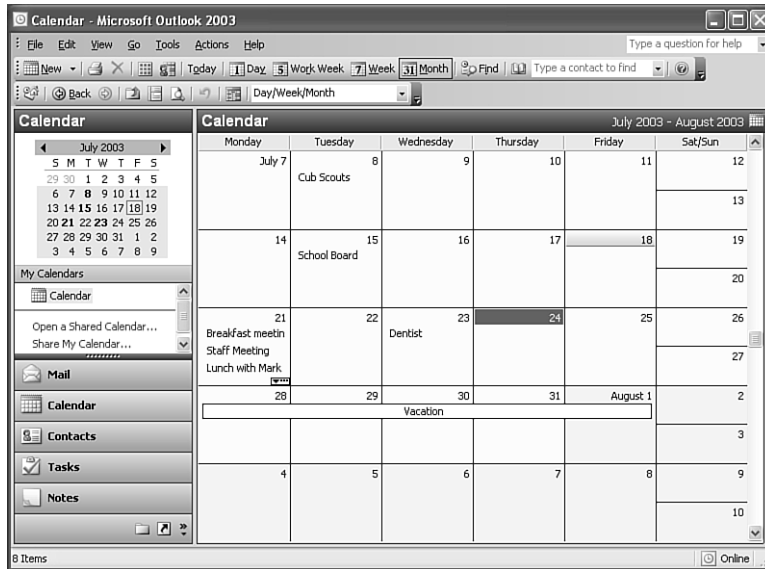


# Adding and Working with Events in the Calendar Folder

You can create *events* in the Calendar folder. Outlook treats all events the same, but you can use them for different purposes. For example, you might add an event for a meeting, an appointment, a project you need to complete, and so on.

## Adding an Event

Adding an event appointment in Outlook is easy:

1. Click Calendar on the Navigation pane to open the Calendar folder.

2. If you are viewing the Calendar folder in the Day or Work Week view, click the time slot for the beginning of the event. If you're working in the Week or Month view, click the day.

3. Type a name for the event, such as `Meeting with Joe`, and then press Enter. The event should now show up in the Calendar.
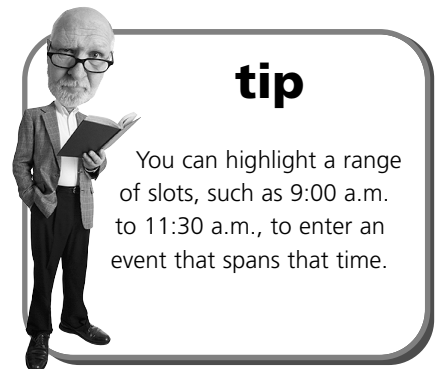
**tip**

You can highlight a range of slots, such as 9:00 a.m. to 11:30 a.m., to enter an event that spans that time.

Outlook treats the event a little differently, depending on what view is being used when you add it. In the Day and Work Week views, Outlook creates an appointment (that is, an event) within the time slot you selected when you started typing. In the Week and Month views, Outlook creates an all-day event on the selected date.

➭ See the section "Working with Reminders," later in this chapter, for details on changing the default reminder time or the reminder for a specific appointment.

**tip**

Outlook automatically adds a reminder for each appointment that pops up 15 minutes before the appointment.
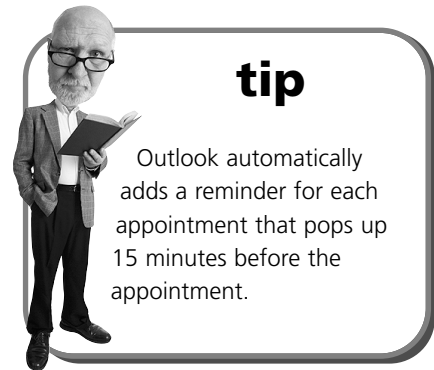
## Viewing and Changing an Event

Outlook events are much more than just a bit of text on the Calendar. You can add all sorts of information to an event. Double-click an appointment to open its form, as shown in Figure 6.3.

**FIGURE 6.3**

You can add lots of information to an event.

The subject of the event is what appears in the Calendar folder. You can also enter a location, start time, end time, and notes. Although the times in the drop-down list boxes on the event form are in half-hour increments, you can enter your own values if needed. For example, you might start an appointment at 9:05 a.m. and end it at 10:20.

You can set several other properties for an event. You click the Contacts button to select one or more contacts in order to associate them with the event. For example, if you're setting up an event for a conference call, you might add the contacts for the people involved in the call so you have quick access to their phone numbers.

You can also click Categories to associate one or more categories with the event. For example, if the event is a meeting for a particular project, you can associate the project's category with the event. You can then sort the Calendar folder by categories and quickly find all items associated with a specific category.

## Group Scheduling

When you open an event, you find a Scheduling tab on the event form (see Figure 6.4). You can use this tab to set a tentative meeting time and invite others to attend the meeting. You can also see if the other invitees' schedules are open to choose an appropriate time for the meeting. However, this requires at least one of the following:

**FIGURE 6.4**

You use the Scheduling tab to invite others to a meeting.
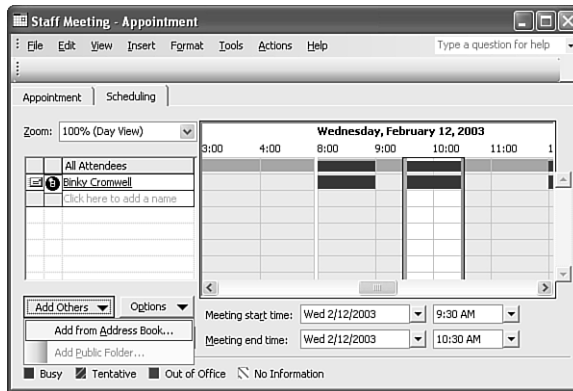


- **You need to share the same Exchange Server site**—If this is the case, you can view the schedules of others in your Exchange Server organization.
- **Each participant must publish free/busy information to a server**— If this is the case, you can view schedules published to a free/busy service such as the Microsoft Internet Free/Busy Service.

Outlook 2003 gives you two ways to view group schedules. First, you can view schedules when you create a meeting request. Second, you can create a named group schedule. Follow these steps to create a meeting request:

1. In Outlook, open the Calendar folder and click New to create a new event.

2. Fill in the subject and other information on the Appointment tab of the event form.

3. Select the Scheduling tab.

4. Click the Add Others drop-down list and then select Add from Address Book (refer to Figure 6.4).

5. Select the others whose schedules you want to view and click Required or Optional.

6. Click OK.

**tip**

Select a resource such as a meeting room or piece of equipment and click Resources in the Select Attendees and Resources dialog box to add that resource to the meeting request.

At this point Outlook checks the free/busy server you've specified in your calendar options or in each contact and display the free/busy times in the Scheduling tab, as shown in Figure 6.5.

**FIGURE 6.5**

The Scheduling tab shows free/busy times for each attendee.
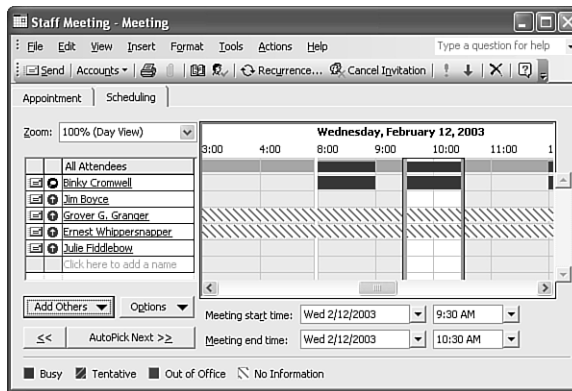


Use the free/busy times shown in the Scheduling tab to find a meeting time that enables everyone (or as many people as possible) to attend. Outlook automatically tries to pick a time that supports all users and at least one resource. You can choose a different AutoPick strategy from the Options button. Click AutoPick Next to automatically locate the next available time that matches your current AutoPick option.

Finally, set the meeting start and end time by using the combo boxes on the Scheduling tab, and then click Send when you're satisfied with the meeting request.

The second method that Outlook 2003 offers for creating and viewing group schedules doesn't require you to create an event. You can create multiple group schedules and save them by name for use any time. The main reason to use this method is to create schedules that you use primarily to manage resources or personnel rather than to create meeting requests. Here's how you use this method to create and view a schedule:

1. In Outlook, open the Calendar folder and choose Actions, View Group Schedules. The Group Schedules dialog box appears. This dialog box lists the schedules you've previously created and lets you create and delete schedules.

2. Click New, type a name for the group schedule, and click OK. Outlook opens a scheduling dialog box similar to the one shown in Figure 6.6, which is very similar to the one shown in Figure 6.5.

**FIGURE 6.6**

You can create a group schedule without creating an event.
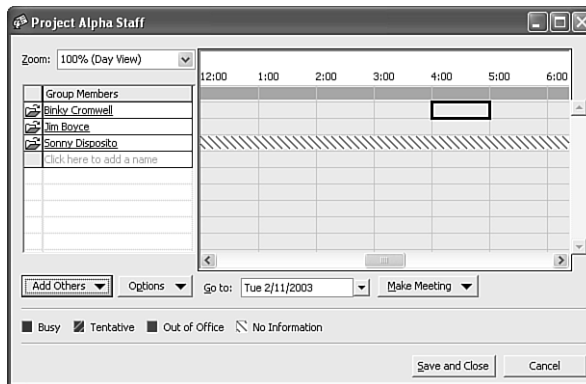


3. Add attendees and resources, as explained earlier in this section for an event. Then click Save and click Close to save the schedule.

# Publishing Free/Busy Information

If you want to do group scheduling with others who don't share your Exchange Server organization, you need to publish your free/busy times to a server that is accessible to those other people, and other people need to publish their free/busy information to a server that you can access.

Microsoft maintains a service called the Microsoft Internet Free/Busy Service that you can

**tip**

The group schedule dialog box includes a Make Meeting button that you can click to create a meeting request or send an email message to one or more of the people included in the schedule.

use to share schedules. With it, you have control over who can view your published schedule.

Follow these steps to specify the location for publishing your free/busy information:

1. In Outlook, choose Tools, Options and then click Calendar Options.

2. Click Free/Busy Options. The Free/Busy Options dialog box appears (see Figure 6.7)

**FIGURE 6.7**

Set your free/busy server location by using the Free/Busy Options dialog box.
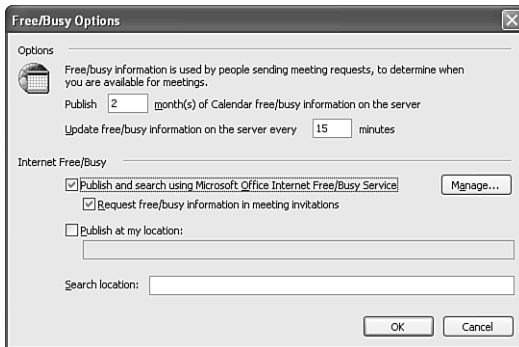


3. Enter the number of months to publish.

4. Enter the frequency, in minutes, at which Outlook should update your free/busy information.

5. Choose Publish and Search Using Microsoft Internet Free/Busy Service.

6. Select Request Free/Busy Information in Meeting Invitations.

7. Click Manage.

At this point, your Web browser opens and takes you to the Microsoft Internet Free/Busy Web site. If your computer isn't configured to automatically log on with your Microsoft Passport, you need to log on. If you don't have a Microsoft Passport, you have to sign up for one.

After you log in with your Passport, the Microsoft Internet Free/Busy Web site steps you through the process of setting up your free/busy information and specifying who can view it.
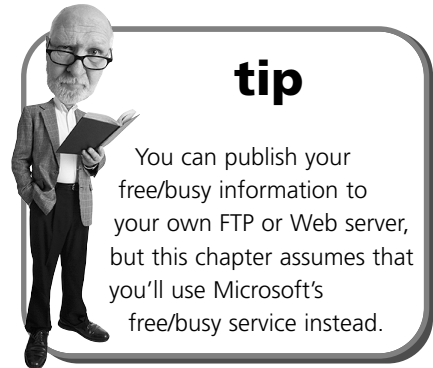
# Working with Reminders

When you create an event such as an appointment in your Outlook Calendar folder, Outlook automatically adds a *reminder* to the event and sets it to fire (that is, go off) 15 minutes before the event's start time. When the reminder fires, Outlook plays a reminder sound and displays a dialog box that contains the reminder and any other triggered reminders, as shown in Figure 6.8.

**FIGURE 6.8**

The Reminders dialog box shows Outlook reminders for events.
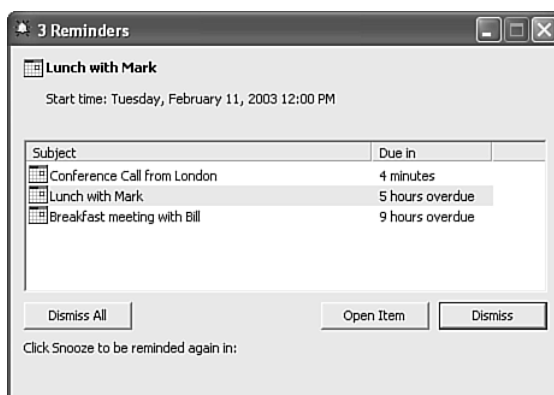


You can postpone a reminder so that it fires again later. For example, you might not be ready to make a phone call, but you might want to be reminded about the call again in 10 minutes. In this case, just click the appropriate reminder in the Reminders dialog box, select a time from the drop-down list box, and click Snooze.

You can also dismiss one or more reminders. To do so, select the reminder(s) you want to dismiss and click Dismiss. Or click Dismiss All to dismiss all the reminders that are set.

➩   See the section "Changing the Reminder Sound and Default Time" in Chapter 8 to learn how to assign a different sound to reminders.

You don't have to snooze or dismiss reminders. Instead, you can simply minimize the Reminders dialog box and restore it again when you want to work with the reminders. Or you can click the Close button to close the dialog box. Choose View, Reminders Window when you want to open the Reminders dialog box again.

# Coloring Certain Types of Events

The calendar provides at-a-glance access to your appointments and other events by displaying them in the calendar. Wouldn't it be great if you could make certain

types of events appear in a particular color to make them stand out? Well, you can! Even better, it's easy to do. You just have to apply a label to the event. You can also change label color or even use automatic formatting to color items automatically.

## Applying Labels to Events

A *label* is a combination of a color and a description that identifies a particular type of event. Outlook provides 10 different labels that you can use as they are or change to suit your needs. Follow these steps to color an event in the Calendar folder:

1. Open the Calendar folder, right-click an event, and choose Label.

2. Choose the color you want to apply to the event.

## Customizing Labels

Each of Outlook's 10 different labels has its own combination of color and text (for example, the Personal label is green). But you can change the text associated with a color. For example, you might want green to represent pending projects.

You follow these steps to change label:

1. Right-click any event and choose Label, Edit Labels to open the Edit Calendar Labels dialog box (see Figure 6.9).

**FIGURE 6.9**
Change labels by using the Edit Calendar Labels dialog box.



Edit Calendar Labels

- Important
- Business
- Personal
- Vacation
- Must Attend
- Travel Required
- Needs Preparation
- Birthday
- Anniversary
- Phone Call

OK    Cancel
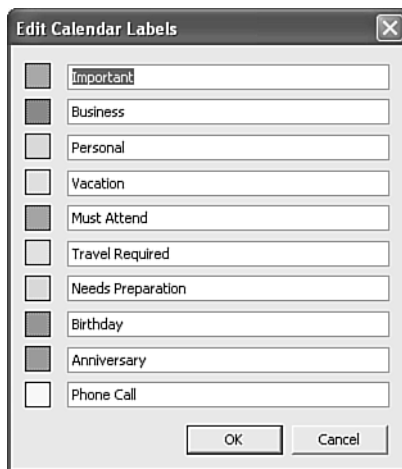
2. For any label, highlight the text you want to change and type the new text.

3. When you are done changing the labels, click OK.

You can't add new colors or change the existing colors, but you can change any or all of the text descriptions for your labels.

# Coloring Events Automatically by Using Formatting

Wouldn't it be great if you could have Outlook automatically color certain types of events? For example, maybe you want all holidays to appear in blue in the Calendar folder or all events that contain a certain text string in the subject to appear in red.

Outlook 2003 includes an automatic formatting feature that lets you specify rule conditions to color events automatically. With automatic formatting, you don't need to apply a label manually to color the event. Instead, Outlook checks the conditions you've specified for automatic formatting and applies a label for you as soon as you create the event.

Follow these steps to use automatic formatting to color events in the Calendar folder:

1. Open the Calendar folder and choose Edit, Automatic Formatting to open the Automatic Formatting dialog box (see Figure 6.10).
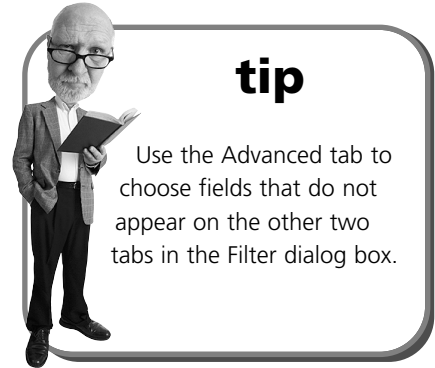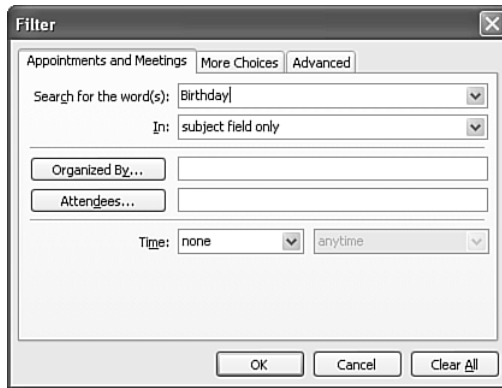
**FIGURE 6.10**

Use the Automatic Formatting dialog box to color Calendar events automatically.



2. Click Add, click in the Name field, and enter a name for the rule, such as `Birthdays`.
3. Select a label from the drop-down list box.
4. Click Condition to display the Filter dialog box (see Figure 6.11).

**tip**

Use the Advanced tab to choose fields that do not appear on the other two tabs in the Filter dialog box.

5. Use the controls on the Filter dialog box to specify the conditions for which you want Outlook to check.

6. Click OK and then click OK again to close the Automatic Formatting dialog box. Outlook applies the changes immediately.

# Keeping Track of Holidays, Birthdays, and Other Special Events

You might have already guessed that you can enter any kind of event in the Calendar folder. You're not limited to just keeping track of business meetings or work-related tasks. You can keep track of holidays, birthdays, and other special events.

## Adding Holidays

Outlook doesn't automatically add holidays to your Calendar folder because it has no way of knowing what country you are in. It does, however, include holidays for most countries. You can add them to your Calendar folder easily. Here's how:

1. In Outlook, choose Tools, Options. The Options dialog box appears. Click Calendar Options.

2. Click Add Holidays on the Calendar Options dialog box. The Add Holidays to Calendar dialog box appears (see Figure 6.12).

3. Place a check mark beside the countries whose holidays you want to add to your Calendar folder and then click OK.

Select countries from the Add Holidays to Calendar dialog box.

**Add Holidays to Calendar**

Select the locations whose holidays you would like copied to your Outlook Calendar:

- [ ] Syria
- [ ] Thailand
- [ ] Tunisia
- [ ] Turkey
- [ ] United Arab Emirates
- [x] United Kingdom
- [x] United States
- [ ] Uruguay
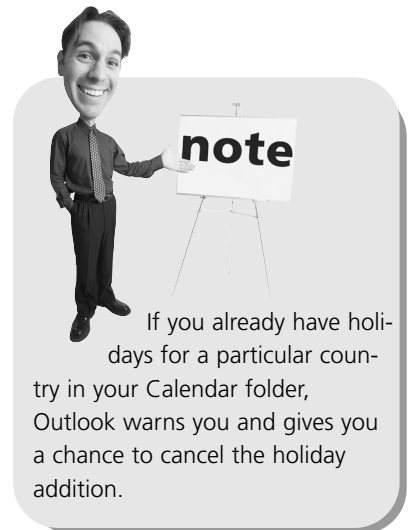- [ ] Venezuela
- [ ] Yemen

[ OK ]  [ Cancel ]

4. Click Cancel and then click Cancel in the Options dialog box. At this point, Outlook usually opens the Reminders dialog box and beeps like crazy because by default it adds a reminder to each holiday.

5. In the Reminders dialog box, make sure you don't have any important reminders and then click Dismiss All.

## Adding Birthdays and Other Special Events

A birthday or another special event is significant to you, but to Outlook it is no different from a business meeting or holiday. Adding these types of events is easy:

1. In Outlook, click the date (and time, if you're using a view that shows time slots) where you want to add the special event.

2. Type the subject for the event, such as `Mary's Birthday`, and press Enter.

3. Right-click the event you just added and choose Label. Then, optionally, select a label.

Instead of manually adding a label, I recommend that you set up automatic formatting, as described earlier in this chapter, in the section "Coloring Events Automatically by Using Formatting." For example, you can add a Birthday rule that looks for the text *birthday* in the subject. Then, when you enter the birthday, you need to make sure to include the word *birthday* in the subject so Outlook will color it automatically, using the label you've assigned to the automatic formatting rule.

**note**

If you already have holidays for a particular country in your Calendar folder, Outlook warns you and gives you a chance to cancel the holiday addition.

# Printing a Calendar

You probably don't often print email messages or contacts, but you might print your Calendar folder fairly frequently, particularly if you use a paper day planner.

It's as easy to print the Calendar folder as it is to print any other document. You specify which range of dates to print, the type of printout format you want, and other options. You have the ability to create a variety of different views of the same information. For example, you might print a month's worth of the Calendar folder to use as a wall or planning calendar.

To print a range of events, open the Calendar folder and choose File, Print to open the Print dialog box, which is shown in Figure 6.13.
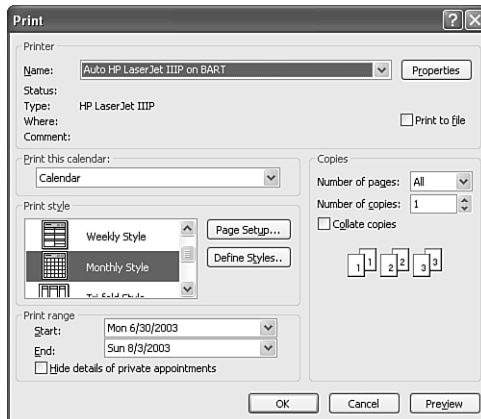
**tip**

I have five children at home and use Outlook to keep track of each child's chores for the day. I print a monthly schedule and stick it on the refrigerator with a magnet so everyone knows their responsibilities for the day. That cuts out all arguing (or most of it) about whose turn it is for each chore.

**FIGURE 6.13**

You can choose the print style from the Print dialog box.



The Print Style list includes five different print styles. Each print style produces a unique output. For example, you would use the Monthly style to print a wall calendar. Each of these styles has certain properties you can change. For example, on the Monthly style, you can turn off weekends so the printout includes only work days.

To set properties for a style, first select the style from the list and then click Page Setup. The Page Setup dialog box appears. Figure 6.14 shows the Page Setup dialog box for the Monthly style.

**FIGURE 6.14**

You can use the Page Setup dialog box to set options for the selected style.
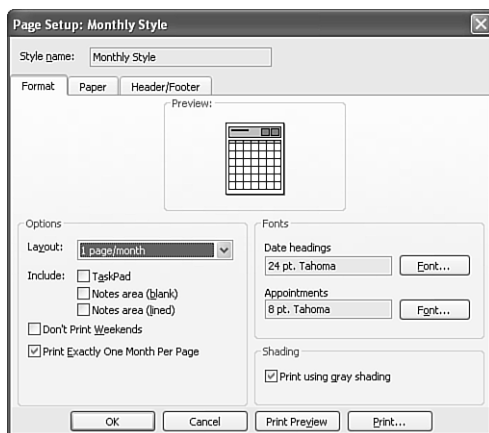


After you select the options you want, click the Print Preview button to view a sample printout. Then click the Page Setup button in the preview toolbar to return to the Page Setup dialog box to make layout changes, or click the Print button to return to the Print dialog box to change options there, such as the start and end times for the printout.

If the existing print styles and options don't give you quite the results you need, or if you don't like having to change them each time, you can create a custom print style. I don't go into detail on custom print styles here because that's a rather advanced topic, but here's a quick overview:

1. Choose File, Print to open the Print dialog box.

2. Click Define Styles to open the Define Print Styles dialog box.

3. Select an existing style and click Copy to open the Page Setup dialog box.

4. Edit the name and settings and then click OK.

You can then choose your custom print style when you need to print your Calendar folder.

# Creating a Recurring Appointment or Event

Almost everyone has some events that recur. For example, I write tips for distribution by email, and those tips are always due on the first Wednesday of the month. Likewise, I have a school board meeting the third Tuesday of each month. These are good examples of *recurring events*. As you might expect, Outlook does a good job of managing these events.

## Creating a Recurring Event

You create a recurring event in much the same way that you create a one-time event. You just need to go the extra step to specify the event's recurrence pattern. Here's how you create a recurring event:

1. In Outlook, open the Calendar folder and create an event as explained earlier in this chapter, in the section "Adding an Event." Or simply double-click a one-time event that you've already created.

2. Click the Recurrence button in the event dialog box's toolbar. The Appointment Recurrence dialog box, shown in Figure 6.15, appears.

**FIGURE 6.15**

Specify an event's recurrence pattern in the Appointment Recurrence dialog box.



3. Choose the start time, end time, and duration in the Appointment Time group box.

4. Choose Daily, Weekly, Monthly, or Yearly. The rest of the options in the Recurrence Pattern group box change accordingly.

5. Choose options in Recurrence Pattern group box to specify how often and when the event reoccurs.

6. In the Range of Recurrence group, choose the first date for the event. Choose End After if you want to stop the recurring event after the specified number of occurrences. Choose End By to end the event by the specified time.

7. Click OK and then click Save and click Close to save the event.

## Changing a Recurring Event

As with one-time events, you can make changes to recurring events. You can change a single occurrence of an event, or change the entire series of occurrences.

To change a recurring event, double-click the event in the Calendar folder. Outlook displays the Open Recurring Item dialog box, which is shown in Figure 6.16.

**FIGURE 6.16**

Choose whether to change one occurrence or an entire series.



Choose Open This Occurrence if you want to make changes to only one instance of the recurring event. Choose Open the Series to make a global change to the series. Click OK to open the event, make the changes, and click Save and Close to save the changes.

# Tracking Documents and Events by Using the Journal

The Journal folder in Outlook lets you keep track of lots of different types of events that don't really fit into the other Outlook folders. For example, you can use the Journal folder to keep notes, to track duration of phone calls, to track the time you spend working on particular documents, and to note other events. In fact, Outlook can automatically track your document usage in the Journal folder if you direct it to do so.

Outlook doesn't show the Journal folder on the Navigation pane by default. You can open the Journal folder from the folder list. Or click Configure Buttons on the bottom right of the Navigation pane and then choose Navigation Pane Options. Place a check mark beside the Journal folder and click OK. The Journal folder then appears on the Navigation pane.

The first time you open the Journal folder, Outlook asks if you want it to automatically keep track of your documents (see Figure 6.17).
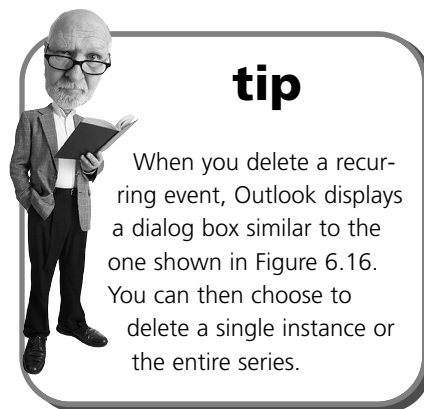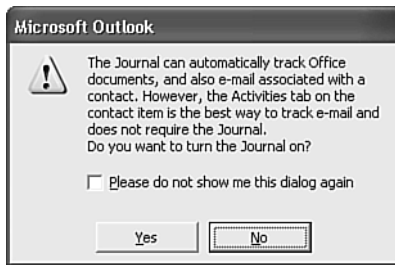
In general, I don't suggest that you turn on automatic journaling of all items in Outlook because it can bloat the Journal folder. However, selectively journaling items from specific contacts helps you limit the amount of information Outlook adds to the Journal folder.

To turn on automatic journaling, you click Yes when prompted, as shown in Figure 6.17. Outlook then displays the Journal Options dialog box, shown in Figure 6.18.

**FIGURE 6.18**
Set up journal-
ing by using the
Journal Options
dialog box.
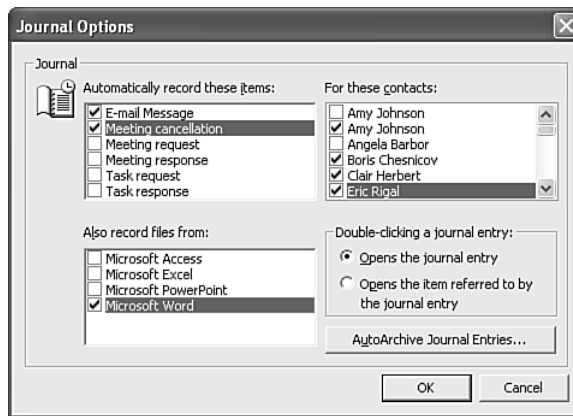


Follow these steps to set up journaling:

1. In the Automatically Record These Items list, place a check mark beside each item you want Outlook to add to the Journal folder.

2. Place a check mark beside each contact for whom you want to track the selected items.

3. In the Also Record Files From list box, place a check mark beside the

applications whose documents you want the Journal folder to track automatically.

4. In the Double-Clicking a Journal Entry group box, choose one of the following options:

   ■ **Opens the Journal Entry**—With this option selected, when you double-click an item in the Journal folder, Outlook opens the item itself.

   ■ **Opens the Item Referred to by the Journal Entry**—With this option selected, when you double-click an item in the Journal folder, Outlook opens the document or other item associated with the entry.

5. Click OK to close the Journal Options dialog box.
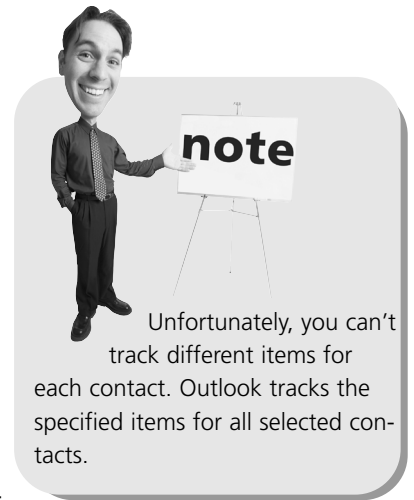
## Using the Journal

Figure 6.19 shows the Journal folder with a few items added to it. The default view shows a linear time line with items organized by type. For example, all phone calls are grouped together, all email messages are together, and all Word documents are grouped together.

**FIGURE 6.19**

The Journal folder holds your journal items.
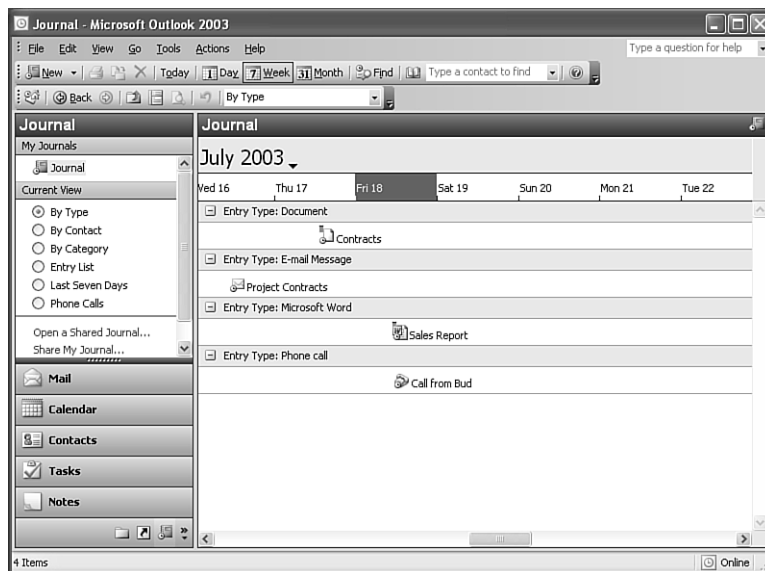
You can open a Journal folder entry by double-clicking it in the Journal folder. Figure 6.20 shows an example of a Journal folder entry—in this case, an entry for a phone call.

**FIGURE 6.20**
Add Journal items to track phone calls and over events.
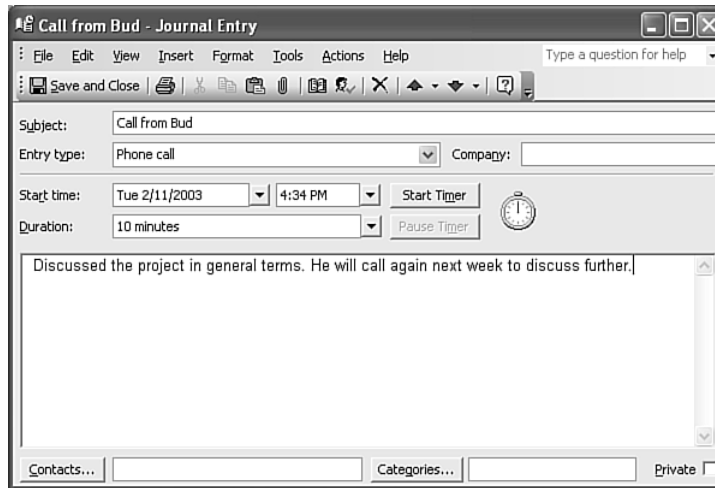


A Journal folder entry is relatively simple. You can specify a subject, choose an entry type, set time and duration, and assign categories or contacts to the item. Note that you can also mark Journal folder entries as private, which prevents your delegated assistant and others from seeing them unless you explicitly give them permission (through folder permissions) to view your private items.

## Creating a Journal Entry Manually

You create a Journal folder entry yourself in much the same way that you create other Outlook items. First, open the Journal folder, and then click New in the toolbar. Outlook displays a new Journal folder item form. Choose the entry type, fill in the other fields as needed, and then click Save and Close.

## Turning Off Journaling

Journaling takes some system overhead, so it can have an impact on your system's performance. If you decide that journaling is having too big an impact on your system's performance, or if you just want to switch to manual journaling, you can turn off automatic journaling.

Outlook doesn't give you a one-click method to turn off automatic journaling. Instead, you need to follow these steps to turn it off:

1.  Open Outlook and choose Tools, Options. The Options dialog box appears.
2.  Click Journal Options.
3.  Remove all the check marks from the Automatically Record These Items and the Also Record Files From lists.
4.  Click OK and then click OK to close the Options dialog box.

# The Absolute Minimum

The Outlook Calendar folder helps you keep track of your appointments, meetings, and other events by providing an at-a-glance look at your day, week, or month. You can set reminders to notify you prior to an appointment, a meeting, or an event to help you keep on schedule. You can also use color to help differentiate one type of Calendar item from another, such as personal items from business ones. Using recurring appointments and events eliminates the need for you to set up multiple individual items for items that recur.

The Calendar folder is also useful for tracking holidays and other special occasions, such as birthdays, weddings, and vacations.

Outlook gives you the capability to view the Calendar folder in several ways, and you can also print calendars and individual items.

Finally, in this chapter you learned how you can use the Journal folder to track phone calls, conversations, time spent on a document, and other events.

The following chapter explores another of Outlook's default folders—the Tasks folder. You can use the Tasks folder to create and manage your own to-do list, as well as assign tasks to others.