CHAPTER **15**

SHARING SCHEDULES AND PLANNING MEETINGS

In this chapter

Sharing Group Schedules

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Outlook is more than a personal organizer. If you work closely with a team of people who also use Outlook, you can coordinate schedules among group members to streamline the process of organizing meetings. As a meeting organizer, your job is much easier when you can see at a glance what times are available for the other group members.

In the office, you can view details from calendars on a Microsoft Exchange Server or on a corporate Web server. For users of Outlook 2002 and 2003 only, Microsoft offers a publicly accessible Internet server on which you can publish a list of Free/Busy times and share them with friends, family, and co-workers over the Internet.

CAUTION

> The basic concepts behind group scheduling are simple, but the reality is not so easy without an Exchange Server close at hand. Support for Internet Free/Busy information sharing has improved greatly since its introduction in Outlook 2000, but the public server still offers significant limitations, most notably the fact that you can't see any details of another person's schedule, only that he happens to be busy at a particular time.

To use Outlook's automatic scheduling features, everyone in your office needs to publish details of their schedules so that Outlook can identify free and busy times for each meeting attendee. If you're connected via an *Exchange Server*, this process is relatively easy. If you choose to use an Internet or intranet-based Web server, the process is slightly more complicated.

TIP FROM

EQ & Woody

> *Group scheduling* works properly only when everyone in a workgroup actively participates. In particular, you need to make sure that every appointment you make is entered in your Calendar folder; if you don't, Outlook constantly reports to other people that you have free time, even when you're booked solid. Make sure that you select the Show Time As check box for every appointment. You can select any of four options: Free, Tentative, Busy, or Out of Office. Click the Private box if you've published your Calendar folder on an Exchange Server and you want others to see only that you're busy, without being able to view details.

Sharing Calendars on an Exchange Server

To allow other users to share your calendar on an Exchange Server, you must meet all the following conditions:

- You must use Microsoft Exchange Server as your mail service.
- Your Calendar folder must be stored in the Exchange Server mailbox.

■ You must assign access permissions to the Calendar folder. Right-click the folder icon, choose Properties, and click the Permissions tab. Click Add to add the name of a user or group; choose Default to assign rights for all persons who have access to the Exchange Server. Set the desired permissions and click OK.

CAUTION

> When assigning rights to others to view your Calendar folder, be careful. For the default access, choose the Reviewer role, which enables others to view items in your Calendar but not add, edit, or delete items. Remember that unless you select the Private check box, other people will be able to read the Subject line of any appointment or meeting on your Calendar.

USING MICROSOFT'S PUBLIC FREE/BUSY SERVICE

If you use Outlook outside of a traditional office, you can use Microsoft's Internet-based Free/Busy Service to store information about your schedule. If the other members of your team do the same, you can easily share schedules with one another when you're halfway across the country or even on different continents.

TIP FROM

EQ & Woody

> If you share schedules with people in other time zones, it's crucial that you configure Outlook to reflect your time zone accurately. Don't forget to do the same in your Passport account.

To set up the connection, choose Tools, Options, and click the Preferences tab. Click the Calendar Options button, and then click the Free/Busy Options button. In the Free/Busy Options dialog box, select the Publish and Search Using Microsoft Office Internet Free/Busy Service check box. To set up the service or change settings, click the Manage button. The management controls are Web-based; this button opens your Web browser and takes you to the correct page.

To use the Microsoft Office Internet Free/Busy Service, do the following:

1. Log in with a Microsoft Passport account. This account is based on an e-mail address; it does not have to be the primary e-mail address you use with Outlook.
2. Sign up for the Microsoft service.
3. Enable Outlook to work with the service. This process uses an ActiveX control.
4. Authorize other users to access your Free/Busy information. They can do so using Outlook 2002/2003 or by accessing the Microsoft Office Internet Free/Busy Service directly over the Web.

Note that this option is not compatible with Outlook 97, 98, or 2000. If your team uses a mix of new and old Outlook versions, you can still share Internet Free/Busy information using the option described in the next section.

## PUBLISHING FREE/BUSY INFORMATION ON A WEB SERVER

If you don't have access to an Exchange Server, you can still publish your Free/Busy information to a Web or file server for sharing over a company intranet. This option lets other people see the times you've marked as busy on your calendar, but it doesn't allow them to view details about individual appointments.

Outlook publishes Free/Busy information as a simple text file in iCalendar format. To publish your information, follow these steps:

1. Choose Tools, Options, and click the Preferences tab. Click the Calendar Options button, and then click the Free/Busy Options button. You'll see the dialog box shown in Figure 15.1.

Figure 15.1
To publish your free and busy times on a Web server, enter the details here.
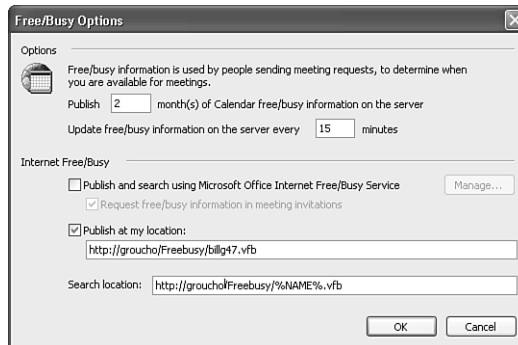
2. Check the Publish at My Location box.
3. In the Publish at My Location box, enter the full address of the Web page or file where you want to publish your Free/Busy information. You must have permission to create and edit files at this location.

TIP FROM

EQ & Woody

You can define any page name for your Free/Busy information, but we suggest that you use the following standard naming scheme. Start with the full name of the server, and for the page name, use the first portion of your e-mail address (up to the @ sign), followed by the extension .vfb. Thus, if your e-mail address is jsmith@example.com and your administrator has set up a folder called Freebusy on a Web server named Groucho, enter the URL `http://groucho/freebusy/jsmith.vfb`. You can also use a shared folder on a file server, using the syntax `\\groucho\freebusy\jsmith.vfb`. Using this naming convention makes it easy for other people to find your information without customizing your contact record, as explained in step 5.

4. Specify the number of months of information you want to include on the Free/Busy page, as well as how often you want to update this information. By default, Outlook publishes two months' worth of information and updates details every 15 minutes. You can enter any number between 1 and 99 in either box.

5. In the Search Location box, enter the following URL: `http://<servername>/<pathname>/%NAME%.vfb`. Substitute the actual names of the server and path where your company's Free/Busy information resides, but type the remaining text exactly as shown here. When searching, Outlook substitutes the first part of each contact's e-mail address for the %NAME% variable, followed by the .vfb extension. If everyone in your organization uses the standard naming conventions defined in step 2, you'll be able to pick up Free/Busy information automatically.

6. Click OK to close the dialog box and begin publishing your Free/Busy information on the schedule you specified in step 4.

If some of your contacts have published information using nonstandard naming schemes, or on servers other than the default location you defined, you can enter a custom URL that identifies this information. Switch to the Contacts folder and open that person's item; then click the Details tab and enter the full URL (or the location of the shared file) in the Internet Free-Busy Address box.

USING A SHAREPOINT CALENDAR

If you and your co-workers have access to a SharePoint server, you can create an Events List on the server and use it as a group calendar that everyone on the team can share. If you have permission to view the calendar, you can link it to Outlook 2003 and view the team calendar alongside your personal calendar.

With Outlook running, open the SharePoint Events List in your browser and click the Link to Outlook button on the Events List toolbar. An Outlook dialog box warns you that an outside program is trying to link to your calendar. Click OK to complete the link, and you'll see a side-by-side view like the one shown in Figure 15.2.

Within Outlook, the SharePoint calendar is read-only. You can view the contents of the group calendar, open individual appointments, and search for events, but you cannot add or edit items except by going to the SharePoint Web page. To copy an item from the shared calendar to your personal calendar, double-click the item and choose Actions, Copy to Personal Calendar.

CAUTION

Copying an event from a SharePoint calendar to your personal calendar doesn't create a link between the items. If another member of the team changes the item on the group calendar, you'll see no indication in either location that the two events are no longer in sync. If you do notice that the events have changed, you'll need to manually edit the item on your personal calendar.

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Figure 15.2
To publish your free and busy times on a Web server, enter the details here.
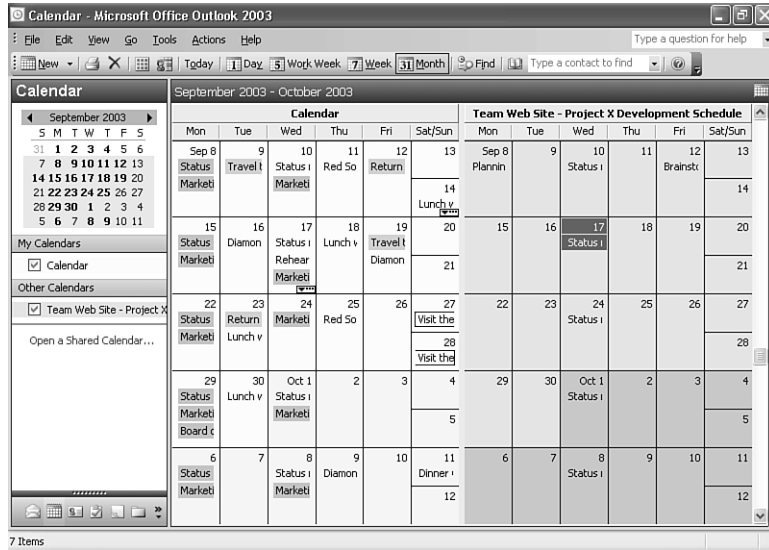
WORKING WITH GROUP SCHEDULES

In previous Outlook versions, comparing group schedules was a fairly cumbersome process. Outlook 2002 and 2003 provide easy access to a group schedule window, where you can save settings for any number of groups and open them by clicking a button. Create a group schedule when you routinely work with a committee or team, all of whom have accounts on the same Exchange Server.

From the Calendar window, click the Schedules button (or choose Actions, View Group Schedules). This opens the Group Schedules dialog box (see Figure 15.3), which shows groups you've already created. You can create a new group or work with an existing group; to add or remove names from a group, for instance, click the Open button. You can also remove a group from this window.

Figure 15.3
This dialog box shows groups you've already created and saved.
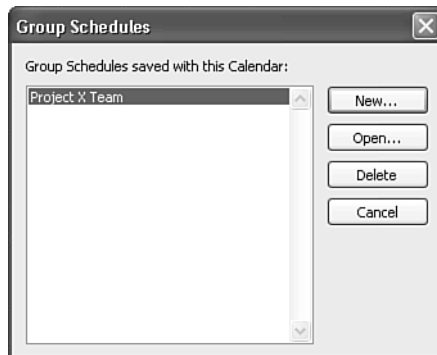
To create a new group, click the New button, enter a name for the group, and click OK. To add new members to the group, enter their names in the Group Members box and let AutoComplete suggest the correct name for you; or click the Add Others button to add from any Address Book or public folder.

Click the Save and Close button to save the settings for the new group you just created. Outlook updates the Free/Busy information for the people on the list. When you're finished, the dialog box should resemble Figure 15.4. If schedule information is not currently available for any person in the group, you'll be prompted to save a link that invites the group members to sign up for the Microsoft Office Internet Free/Busy service when they receive an invitation or e-mail from you.

Figure 15.4
Group schedules make it easy to find free times for a committee meeting.
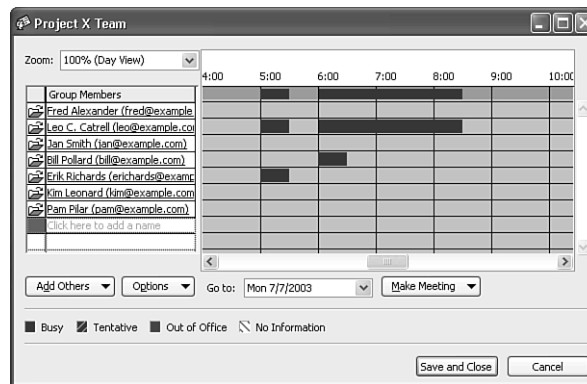
After creating a group, you can use it as the basis of a meeting request or e-mail. Open the group schedule and click the Make Meeting button to see your options.

PLANNING A MEETING WITH OUTLOOK

In the world according to Outlook, there is a crucial difference between an *appointment* and a *meeting*. When you create an appointment, you set aside a block of time on your own personal calendar. Although an appointment might involve other people, it's your responsibility, not Outlook's, to coordinate your schedule with theirs.

An Outlook meeting, on the other hand, consists of identical items in the Calendar folders of two or more people. Although these items closely resemble appointments—with a subject, start and end times, and the option to set a reminder—there are several crucial differences:

■ Every meeting has an *organizer*, who is responsible for setting the time, location, and other details.

■ The organizer fills in a meeting request form that includes details of the meeting as well as the names and e-mail addresses of all required and optional attendees; Outlook sends the invitations automatically when the organizer saves the meeting request.

- When you receive a meeting request, you can accept, tentatively accept, or decline the invitation. If you accept, Outlook adds the meeting to your calendar; Outlook sends all responses to the meeting organizer and tracks the meeting's status automatically.

- As part of the planning process, the meeting organizer can reserve a conference room and other resources, such as overhead projectors or presentation equipment.

- If you and other members of your workgroup publish the details of your schedule on an Exchange Server or a Web server, Outlook can automatically pick a time when all proposed attendees are available.

Creating a New Meeting Request

You can begin scheduling a meeting by opening a meeting request form directly, using any of the following four techniques:

- Choose New, Meeting Request; or press Ctrl+Shift+Q to open a blank meeting request form.

- If you've already selected the exact date and time of the meeting, switch to a Calendar view of that date and select the block of time; then right-click and choose New Meeting Request from the shortcut menu. This option opens a meeting request form with the date and time already filled in.

- To open a meeting request form with the invitees' names already filled in, select one or more names in the Contacts folder. With a single contact selected, you can right-click and choose New Meeting Request to Contact; with multiple contacts selected, choose Actions, New Meeting Request to Contact.

- To create a meeting while viewing a group schedule, click the Make Meeting button and choose New Meeting with All. (You can also Ctrl+click to select individual names from the Group Members list; choose Make Meeting, New Meeting to use only the selected names.)

- If you've already created an appointment in your Calendar folder and you want to turn it into a meeting, open the item and click the Invite Attendees button. This option uses all details you defined previously, adding a field in which you can enter the names of other attendees.

As Figure 15.5 shows, a meeting request form closely resembles an appointment form, with the crucial addition of the To field. Fill in the prospective attendees' names, and then add the remainder of the meeting details—Subject, start time, end time, notes, and so on—as you would for an appointment, and click Send to deliver the invitations.

Figure 15.5
A meeting request form resembles a cross between an e-mail message and an appointment form.

TIP FROM

EQ & Woody

Because the meeting request form is delivered via e-mail, you can use any of Outlook's addressing shortcuts, including automatic name checking. Click the To button to open the Address Book and select names directly.

Don't forget to include details in the Notes box at the bottom of the Appointment tab. Text you enter here appears in the Meeting item added to each attendee's Calendar folder after your invitation is accepted; it also serves as the text of the e-mailed invitation.


TIP FROM

EQ & Woody

To help attendees prepare for a meeting, you might want to send one or more files with the invitation—an agenda or a background memo in Word format, for example, or a worksheet for attendees to review before a budget-planning meeting. Drag a file icon directly into the Notes box on the meeting request form, or choose Insert, File, and select the file from the Insert File dialog box.

When preparing a meeting request, you can designate some attendees as Required and others as Optional. By default, anyone you invite to a meeting is a Required attendee. To change their status to Optional, click the Scheduling tab, click the icon in the column just to the left of any name, and use the drop-down menu to adjust an invitee's status, as shown in Figure 15.6. To view the status of all attendees, click the Tracking tab.

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Figure 15.6
Use this tab on a meeting request form to designate an attendee as optional rather than required.
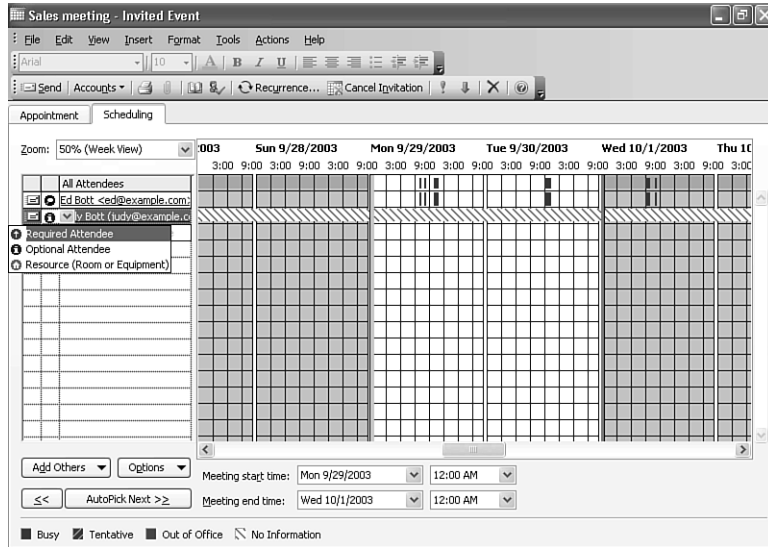
As the meeting organizer, you can change the status of any attendee at any time. When attendees open a Meeting item and click this tab, they see only the list of attendees and their status, without the capability to change the designation. On the meeting organizer's calendar only, this tab also summarizes the responses from prospective attendees.

After you've finished entering all details in the meeting request form, click the Send button. Outlook delivers the requests via e-mail to all prospective attendees.

TIP FROM

Ed & Woody

> Outlook 2003 automatically sends all meeting requests delivered via Internet mail in *iCalendar* format, which ensures that the request will work with all compatible contact-management programs. (Meeting requests sent to Exchange recipients are sent in Rich Text format.) To change this global option, choose Tools, Options, click the Calendar Options button on the Preferences tab, and select or clear the When Sending Meeting Requests over the Internet, Use iCalendar Format box.

USING GROUP SCHEDULES TO CHOOSE A MEETING TIME

One of the most frustrating aspects of scheduling a meeting is the lengthy exchange of e-mail messages and phone calls over schedules. If everyone in your group shares their calendars over the office network or over the Internet, Outlook can help you automatically pick a time when every prospective attendee is free. To work with an existing group schedule, open its window. If you've already started a meeting request form, click the Scheduling tab.

The list of attendees appears in the column at the left. To add new invitees to the list, enter a name directly in the blank box just below the last name in the list; click the Invite Others button to select additional people or resources from the Outlook Address Book.

On an Exchange Server where you've been granted permission to view another person's calendar, you'll see details about the other person's appointments. If you don't have access to calendar details for another person, color-coded blocks in the right side of the window show free and busy times on each attendee's schedule. The white zone is the block of time set aside for your meeting; click a new time to move the meeting, if necessary, or drag the left and right borders to change the start or end time and make the meeting longer or shorter. You can also set start and end times by using the controls at the bottom of the dialog box, and then see whether the time you selected works for all attendees. If your meeting includes a large number of people and only one attendee has a conflict, your easiest course of action might be a quick phone call to that person to see whether she can reschedule her conflicting appointment.

TIP FROM

EQ & Woody

Click and hold the Options button to choose from a menu that controls the display of times. By default, you see only working hours for a two-day period, but you can change the display to show all hours. Another option on this menu lets you refresh the Free/Busy times for all attendees instead of waiting for the next scheduled synchronization. Use the Zoom control at the top of the window to see additional days or greater detail.

Use the AutoPick Next button to instruct Outlook to select the next free time in the calendars of all prospective attendees automatically; click the left or right arrows to pick an earlier or later time that fits on every attendee's calendar.

CHECKING THE STATUS OF A MEETING YOU'VE ARRANGED

Outlook uses special scripts embedded in meeting invitations to process responses. As the invitees accept or decline the meeting request, they return a message to you; when it arrives in your Inbox, Outlook uses the script commands to update the status of the list. As the meeting organizer, you can check a meeting's status at any time by opening it. Look at the information bar at the top of the Appointment tab to see a running tally of the number of prospective attendees who have accepted, declined, or failed to respond.

If you continually fail to receive updates from specific people, see "The Case of the Missing RSVP" in the "Troubleshooting" section at the end of this chapter.

For a more detailed view of responses, click the Tracking tab. This list lets you see at a glance which invitees have failed to respond to your invitation, allowing you to send a follow-up message quickly, if necessary.

RESCHEDULING OR CANCELING A MEETING

Handling changes to Outlook meetings requires a delicate balancing act. After the initial round of invitations and responses, each prospective attendee has a separate meeting item on his calendar. Communication of any changes is crucial. In Outlook 2000 and earlier versions, only the meeting organizer could trigger a new round of Outlook messages that ensured every calendar is properly updated.

As the organizer, you can change the date or time of a meeting, change other details (such as its location), or cancel it outright. To make any changes, open the item in your Calendar folder, click the Appointment tab, and change the meeting details; then click the Send Update button. To cancel the meeting, open the meeting item and choose Actions, Cancel Meeting, or click the Delete button on the Standard toolbar. If you change the date, time, or other details, Outlook prompts you to send an Update message to everyone on the list; if you cancel a meeting, Outlook generates a cancellation request.

An Update message looks exactly like the original request. Everyone who receives it will see the Accept, Decline, and Tentative buttons, just as if it were an original meeting request.

TIP FROM

Ed & Woody

> When you send an Update message, be sure to include text in the Notes box that explains the changes you've made—that text becomes the body of the update message. If you omit this step, attendees who don't read the message carefully might assume they're receiving a duplicate of the original meeting request and fail to notice the change in date or time.

RESPONDING TO MEETING REQUESTS

When you receive a meeting invitation via e-mail, it resembles an ordinary message, with the following key differences:

- The Meeting Request icon to the left of the invitation in the message list is different.
- The message header shows the sender's name, Required and Optional attendees, and the location and time of the meeting.
- Special-purpose toolbar buttons are visible in the message window and in the Reading pane, as shown in Figure 15.7. Using these buttons, you can accept the invitation, decline it, or propose a new time. Click the Tentative button when you want to reserve the right to change your mind later.

If you accept the invitation, Outlook adds the item to your calendar. You can add a note to your response or send a default notification to the meeting organizer.

Figure 15.7
Use these buttons to accept or decline a meeting invitation. Click the Calendar button to open your Calendar folder and check details of your schedule.
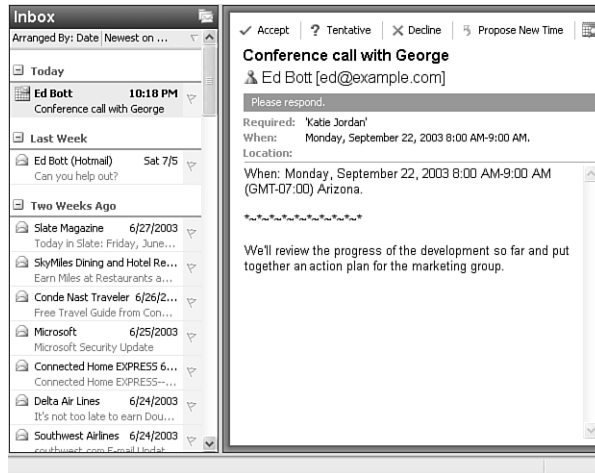
If you're not the meeting organizer, you can propose an alternative date or time for the meeting. Choosing this option opens a form in which you can respond to the meeting organizer. As the organizer, you can see all proposed changes in a single window and choose the one that works best for you.

If a meeting organized by someone else is on your calendar, you can change its time—for that matter, you can delete it outright. There's nothing wrong with this course of action if the meeting organizer stops you in the hall or calls on the phone to cancel or change the time. If you change the item in your calendar, Outlook does not update the original item on the meeting organizer's calendar.

CAUTION

> If you attempt to change the time of a meeting organized by someone else, be sure to click the Propose New Time box. If you click Accept or Tentative, Outlook displays a warning dialog box urging you to send a message to the meeting organizer, but Outlook's response-handling script ignores the changes and marks the original item on the organizer's calendar to show that you've accepted.

To decline an invitation after you have already accepted the meeting request and added it to your calendar, open the item and click the Decline button. Outlook offers to send a message to the organizer; add text explaining that your schedule has changed, and click the Send button.

If you are the meeting organizer, you can also cancel a meeting at any time by deleting it from your calendar. Outlook offers to send a cancellation message on your behalf to all the attendees you previously invited.

TROUBLESHOOTING

THE CASE OF THE MISSING RSVP

Every time I plan a meeting involving a specific person, I fail to receive a response from that person.

Make sure the recipient is receiving your e-mailed invitations. If there's a problem with her e-mail address, the invitations might not be arriving. If she doesn't use Outlook, you might need to send the invitations in iCalendar format. Outlook should choose this format automatically; to verify that this option is selected, open the meeting request form and choose Tools, Send As iCalendar. It's also possible that the recipient is consistently choosing the Don't Send a Response option when acting on meeting invitations. If you can't break recipients of this habit, you'll have to follow up (preferably by phone) and manually update their status on the Attendee Availability tab of the Meeting item.

SECRETS OF THE OFFICE MASTERS: PUBLISHING A CALENDAR AS A WEB PAGE

If you don't have access to an Exchange Server and you don't want to publish your Free/Busy information to a Web server, you can still give other people access to calendar information by saving your Outlook Calendar folder in HTML format.

TIP FROM

Ed & Woody

> This option is especially useful if you maintain an events calendar for an organization. Choose File, New, Folder and create a folder that contains Calendar items. Enter details of the organization's activities as appointments in this folder, and then publish the contents of the calendar periodically as a Web page.

Switch to the Calendar folder and choose File, Save As Web Page. Outlook opens the following dialog box.

Choose the start and end dates you want to publish and specify whether you want to include details about each appointment from the Notes box. Give the calendar a title, specify a file location, and click Save. If you've set up a shortcut to a Web server in your My Network Places
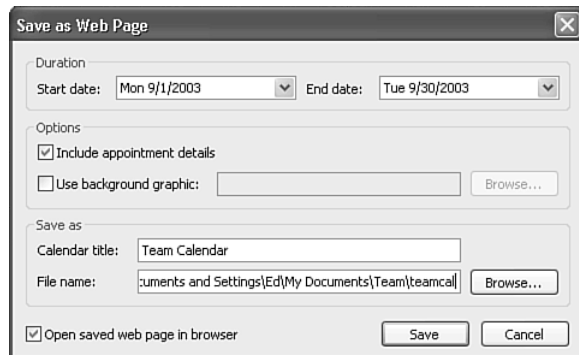
Figure 15.8

folder, you can publish the page directly to the server by using this technique. The result, as shown in the following figure, is a slick, frame-based page that lets you click individual dates in the month view at left and see details in the frame on the right.

Figure 15.9