

CMU/SCS Computing Facilities

# Microsoft Outlook 2011 for Mac Calendar Guide

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## Opening Outlook

Click on the Outlook icon in your **Dock** or from the **Finder menu** click **Go**, click **Applications**. From the **Applications** folder open **Microsoft Office 2011** folder and click **Microsoft Outlook**

## Finding your Calendar

At the bottom of the **Navigation Pane**, click the Calendar icon .

## Creating entries on your calendar

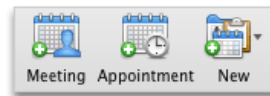
Entries will appear on Outlook calendar as appointments, meetings or events.

### Appointments

Appointments are activities that you schedule in your calendar that do not involve inviting other people. Designating each appointment as busy, free, or out of office, lets other exchange calendar users know your availability.

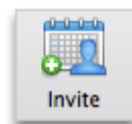
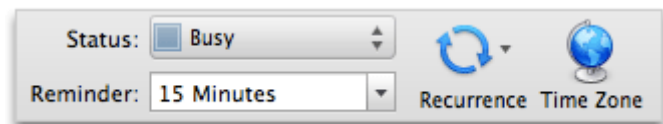
#### *Create an appointment*

1. On the Home tab, click Appointment.



You can also create an appointment in the calendar by double-clicking a time period in the day, week, or month view. The date and time of your selection are automatically entered in a new event window.

2. Enter the details about the event, and then do any of the following:
  - To Display the **Time zone** menu for the event, on the **Appointment** tab, click **Time Zone**.
  - To make the appointment recurring, on the **Appointment** tab, click **Recurrence**, and then select a recurrence pattern.
  - To change the appointment into a meeting by inviting other people, on the **Appointment** tab, click **Invite**.



## Meetings

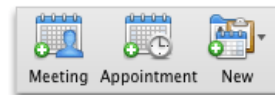
A meeting is an appointment that includes other people. Responses to your meeting requests appear in your **Inbox**.


Outlook helps you find the earliest time when all the invitees, **with an SCS Exchange/Calendar account**, are free. When you send the meeting request by email, the invitees receive the request in their Inbox. When the invitees open the request, they can accept, tentatively accept, or decline your meeting by clicking a single button. If your request conflicts with an item on the invitees' Calendar, Outlook displays a notification. If you, as the meeting organizer, allow this, invitees can propose an alternative meeting time. As the organizer, you can track who accepts or declines the request or who proposes another time for the meeting by opening the request.

**\*NOTE:** Resources are not managed via Exchange and will not be visible in the free/busy grid. SCS resources are managed through an external application accessed via this URL ([www.netsimplicity.net/SCS](http://www.netsimplicity.net/SCS)).

### Schedule a meeting

1. On the **Home** tab, click **Meeting**.
2. To send the invitation from an account that isn't your default account, click an account on the **From** pop-up menu.
3. In the **To** box, enter the names of people or resources to include for the meeting.



To search for additional contacts, on the right side of the **To** box, click .

4. In the **Location** box, type a description or location. (Note: The location field is a text field that is not attached to resources entities).
5. Enter the details about the event, and then do any of the following,

- To display the **Time zone** menu for the event, on the **Meeting** tab, click **Time Zone**.
- To add attachments to the meeting, on the **Meeting** menu, click **Attachments**, and then click **Add**.
- To make the meeting a recurring event, on the **Meeting** tab, click **Recurrence**, and then select a recurrence pattern.
- To see whether your invitees are available, on the **Meeting** tab, click **Scheduling**.



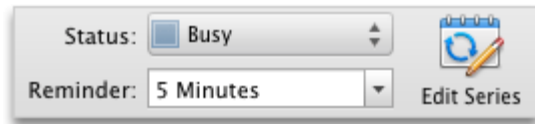
6. When you complete your invitation, on the **Meeting** tab, click **Send**.



### *Update a meeting*

1. Locate the meeting on your calendar, and then double-click the meeting to open it.

If you want to update all instances of a recurring meeting, on the **Meeting** tab, click **Edit Series**.



2. Change the options that you want.
3. On the **Meeting** tab, click **Send Update**.



### *Cancel a meeting*

1. Locate the meeting on your calendar, and then double-click the meeting to open it.
2. On the **Meeting** tab, click **Cancel**.
3. If you want to, type a message to invitees in the **Message** window.
4. On the **Meeting** tab, click **Send Cancellation**.

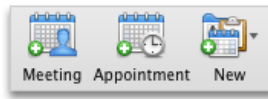


## Events

An event is an activity that lasts 24 hours or longer. Examples of an event include a trade show, a seminar, or a vacation.

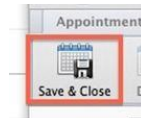
### Create an event

1. On the Home tab, click **Appointment**.



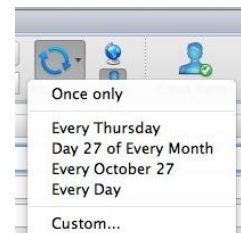
2. In the Appointment window, fill in the **Subject**, **Location**, **Start Time** and **End Time** and check the **All Day Event** check box.

3. Click on the **"Status"** drop-down list to indicate whether you want this time to show as **busy**, **tentative**, **free**, or **"out of office"**. This affects what delegates and others with whom you've shared your calendar will see when they look at your calendar, and what anyone will see when they try to schedule a meeting with you. Click on the **"Save & Close"** button when you're done.



### Set an event to recur

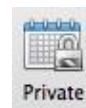
1. Create a **meeting**, **appointment** or **event** like you normally would.
2. You can make the calendar entry reoccurring either before or after you fill the needed information. Click on the **Recurrence** button in the **Options** section.
3. The **Recurrence** drop-down will then open. You can choose a preset or click on "Custom:" to set it up manually.
4. Click on the **OK** button when done.
5. A summary of the recurrence will be shown in the entry.



When a series of meetings has run its course, rather than cancel the meeting, which will remove all historical instances of the meeting, change the recurrence pattern to end on the last occurrence of the meeting. To do this, click the Recurrence button and change the end date.

### *Make an event private*

1. Create or open the event that you want to make private.
2. In the **Appointment** window, click the **Private** icon



### *Set or remove a reminder*

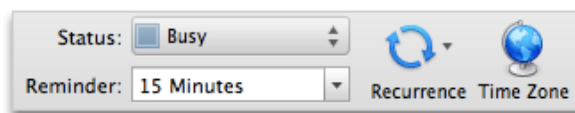
Do one of the following:

- **For all new events that you create**

1. Click the **Outlook** in the menu bar
2. Click **Preferences**.
3. Under **Other**, click **Calendar**. To automatically turn on or off the reminders for new events, select or clear the **Default reminder** check box.
4. If you select the check box, enter how long before the event that the reminder will appear.

- **For existing events**

1. Open the event or the series, if the event recurs.
2. To turn on or off a reminder, on the **Appointment** tab, in the **Options** group, in the **Reminder** list, click **None** or how long before the event that you want a notification.



### *Turn off all Office 2011 reminders*

When you turn off Office Reminders, you will not receive reminders from any of the Office applications.

1. On the *Outlook* menu, click **Turn Off Office Reminders**.

## Calendar Views

The calendar view can be customized to display different day ranges, a mini calendar, and events from different categories.

1. At the bottom of the navigation pane, click **Calendar**.



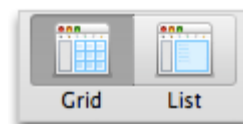
2. Do any of the following:

- To Display a single day, work week, full week, or whole month, on the **Home** tab, click the view that you want.



- To go to the current day, week, or month, on the **Home** tab, click **Today**.

- To view a specific date, on the **Home** tab, click **View Date**, and then click a day.



- To display your events in a list, on the **Organize** tab, click **List**.

- To show more or fewer hours in day or week view, on the **Organize** tab, slide the **Scale** slider.

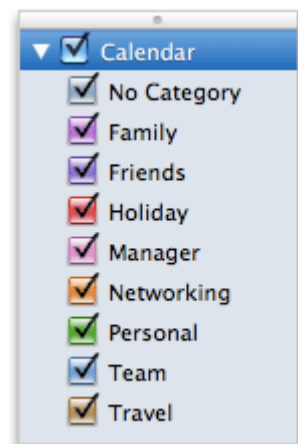


- To hide the mini calendar or expand it to show more months, in the **navigation pane**, click the divider between the mini calendar and the category list, and then drag the divider up or down.

- To show or hide events by category, in the navigation pane, make sure that the category list is showing, and then select or clear the category check boxes.

- To show or hide entire calendars, in the **navigation pane**, select or clear the check boxes that are next to each calendar name.

- To specify your calendar preferences, such as the days of your work week, on the **Outlook** menu, click **Preferences**, and then under **Other**, click **Calendar**.

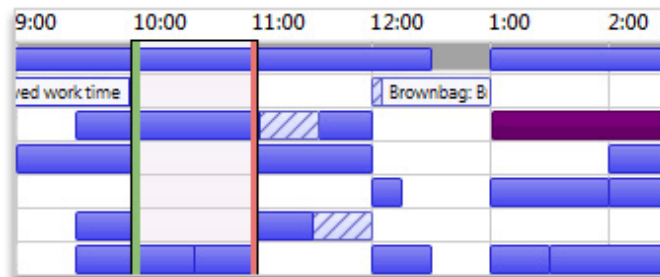




## Schedule View

You can create calendars that show the schedules of a group of people or resources. For example, you can view the schedules of all the people in your department. This helps you schedule meetings quickly.

1. To view Scheduling when composing a meeting request, do the following:
  - On the **Meeting** tab, click **Scheduling**.



## Calendar Sharing

With the **Delegate Access** feature, one person can use his or her own copy of Outlook to easily manage another person's calendar. There are two ways to work with another person's Microsoft Outlook folders — **folder sharing** and **Delegate Access**.

- **Folder sharing** enables another person to access one of your folders, perhaps while you are on vacation. However, it does not include permissions for one to act on behalf of the other.
- **Delegate Access** is an Outlook feature that allows one person to act on behalf of another Outlook user. The most common scenario in which this feature is used is a manager and his or her assistant. The assistant might be responsible for maintaining the manager's schedule, including creating and responding to meeting requests.

### Share your calendars

1. In the **navigation pane**, click the folder that you want to share.
2. On the **Organize** tab, click **Permissions**.
3. Click **Add User**, type the name of the user, and then click **Find**.
4. In the search results, click the user's name, and then click **OK**.
5. In the **Name** list, click the user's name, and then on the **Permission Level** pop-up menu, click the access level that you want.
6. To customize the user's permission levels, select or clear the check boxes. You can also change the options for **Edit Items** and **Delete Items**.



When you delegate a calendar delegates or users who share this folder could view your private events. To help protect your privacy, put private items in a separate, calendar.

### Stop sharing your calendars

1. In the navigation pane, click the folder that you want to stop sharing.
2. On the **Organize** tab, click **Permissions**.
3. On the **Permissions** tab, click the name of the user who you want to stop sharing with.
4. To temporarily suspend access, on the **Permission Level** pop-up menu, click **None**. Or, to permanently stop sharing with the person, click **Remove**.

### *Permissions for sharing a folder*

When you share a folder, you can set permissions that define what each user who accesses the folder can do:

- **Owner:** Can create, read, modify, and delete all items in the shared folder. As an owner, a user can change the permission levels that others have for the folder.
- **Publishing Editor:** Can create, read, modify, and delete all items, and create subfolders.
- **Editor:** Can create, read, modify, and delete all items.
- **Publishing Editor:** Can create and read items, create subfolders, and modify and delete items that you create.
- **Author:** Can create and read items, and modify and delete items that you create.
- **Nonediting Author:** Can create and read items, and delete items that you create.
- **Reviewer:** Can read items only.
- **Contributor:** Can create items only.
- **Custom:** Can perform activities defined by the folder owner.
- **Free/Busy time, subject, location:** For calendar sharing only, can read the free/busy information, subject, and location of calendar events.
- **Free/Busy time:** For calendar sharing only, can read the free/busy information of calendar events
- **None:** Cannot perform any activity. The user remains on the permissions list but has no permission and cannot open the folder.

## Allow someone else to manage your calendar


Microsoft Outlook allows another person, known as a **delegate**, to receive and respond to meeting requests and responses on your behalf. You can also grant additional permissions that allow your delegate to read, create, or have more control over your items.

### *About Delegate Access*


Beyond merely sharing Outlook folders, **Delegate Access** enables you to grant additional permissions, such as allowing a delegate the ability to respond to meeting requests on your behalf.

As the person granting permission, you determine the level of access that the delegate has to your folders. You can grant a delegate permission to read items in your folders or to read, create, change, and delete items.

### *Turn on Delegate Access*

1. On the **Tools** menu, click **Accounts**.
2. Click the account that you want to add a delegate to, click **Advanced**, and then click the **Delegates** tab.
3. Under **Delegates who can act on my behalf**, click **Add** .
4. Type the name of the person that you want to add as a delegate, and then click Find.
5. Click the delegate's name, and then click **OK**.
6. For each item type, use the pop-up menu to select the permission level that you want to set for the delegate.


### *Change permissions for your delegate*

1. On the **Tools** menu, click **Accounts**.
2. Click the account that you want to change permissions for, click **Advanced**, and then click the **Delegates** tab.
3. Under **Delegates who can act on my behalf**, click the **delegate**.
4. Click the **Action**  button, click Set Permissions, and then make the changes that you want.

### Permissions for folder delegation

- **Editor** – Can read, create, and modify items, including modifying and deleting items that the account owner created.
- **Author** – Can read and create items, and modify and delete items that he or she creates.
- **Reviewer** – Can read items only.

### Remove delegation

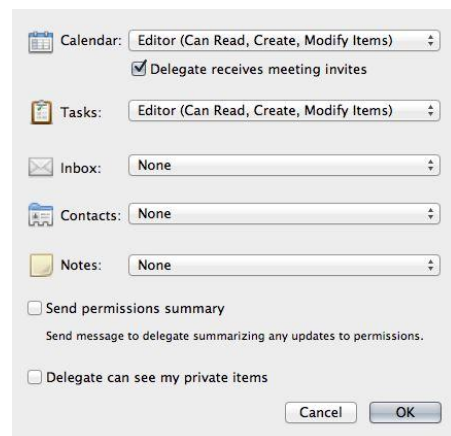
1. On the **Tools** menu, click **Accounts**.
2. Click the account that you want to change, click **Advanced**, and then click the **Delegates** tab.
3. Under **People I am a delegate for**, click the person that you want to stop being a delegate for, and then click **Delete** .

### Change delegate access to private items

If you have assigned permissions to a delegate so that he or she can access your Outlook folders, you can hide personal information in appointments, meetings, tasks, and contacts.

If you want to give a delegate access to see your private items, do the following:


1. On the **Tools** menu, click **Accounts**.
2. Click the account that you want to add a delegate to, click **Advanced**, and then click the **Delegates** tab.
3. Under **Delegates who can act on my behalf**,
4. Type the name of the person that you want to add as a delegate, and then click **Find**.
5. Click the delegate's name, and then click **OK**.
6. Check or uncheck the **Delegate can see my private items** box at the bottom of the window, and then click **OK**.



You should not rely on the Private feature to prevent other people from accessing the details of your appointments. To help protect your privacy, put private items in a separate, calendar

## Manage someone else's Calendar

### *Open another person's folders*

1. Click **Calendar** on the **navigation pane**.
2. On the **Organize** tab, click **Open Calendar**.
3. Click **Find User** .
4. Type the name of the person who granted you access, click **Find**, click the person's name, and then click **OK**.

### *Send or respond to meeting requests for another person*

To respond to meeting requests

1. Open the other person's **Inbox** if his or her meeting requests are not sent to you directly.
2. Open the meeting request.
3. Click **Accept**, **Tentative**, or **Decline**.

To send a meeting request

1. Open the other person's calendar.
2. On the **Home** tab, in the **New** group, click **New Meeting**.
3. Enter the attendees, subject, location, and start and end times as you ordinarily do.

## References and useful external links:

### Outlook 2011 Calendaring

<http://mac2.microsoft.com/help/office/14/en-us/outlook/category/7efcad14-9bf5-4e2c-801e-13242f0e2ec0>

### Lynda.com

<http://www.cmu.edu/lynda/>

### Compare Outlook for Mac 2011 with Outlook 2010 for Windows

<http://mac2.microsoft.com/help/office/14/en-us/outlook/item/a2a4d247-f9f3-4b35-b298-ceb147669dd7>