Microsoft Outlook 2013: Meetings

Using the Scheduling Assistant to set up a Meeting

Microsoft Outlook's Scheduling Assistant is a tool which allows you to invite groups of people to meetings or events without having to email them individually. You may complete a new meeting request which Outlook emails to the desired recipients in the form of an invitation. When the invitation is sent, a tentative appointment will appear on the invitees' calendars. Potential attendees can then accept or reject the invitation. If an individual accepts, Outlook will automatically mark the time as busy on his or her Calendar.

Scheduling Assistant Considerations

The Scheduling Assistant is a powerful tool, but like many other tools, the value is determined by how people use it. If individuals actively maintain their Outlook Calendar, the Scheduling Assistant can be very useful. However, not all participants for a meeting will have access to Outlook and some will choose not to use the Calendar feature. If one or more of your participants does not maintain or use the Outlook Calendar, the value of the Scheduling Assistant decreases.

Creating a New Meeting Request

When you create a meeting in Outlook, you actually create a meeting request. The request is sent out by e-mail to the prospective meeting participants, who respond by accepting or declining the meeting request or by proposing a new time. When you schedule a meeting in Outlook you can view the calendar time slots of co-workers that are on the Outlook exchange server. You cannot see what they have scheduled but you will see a darken time slot, which means that they have filled in their calendar.

1. On the **Home** tab, in the **New** grouping, click **New Items,** then **Meeting**.
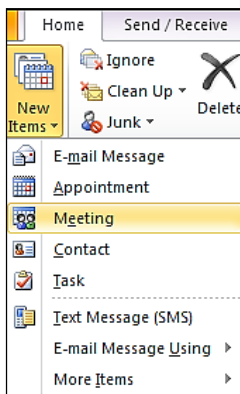
2. An Untitled Meeting appears. In the **To** area add all Attendees.
3. Type in a Subject & any details about the meeting in the body of the message.

4. From the **Meeting** tab, in the **Show** group, click **Scheduling Assistant.** The Scheduling Assistant view appears. To get back to the previous view click the Appointment icon.

5.
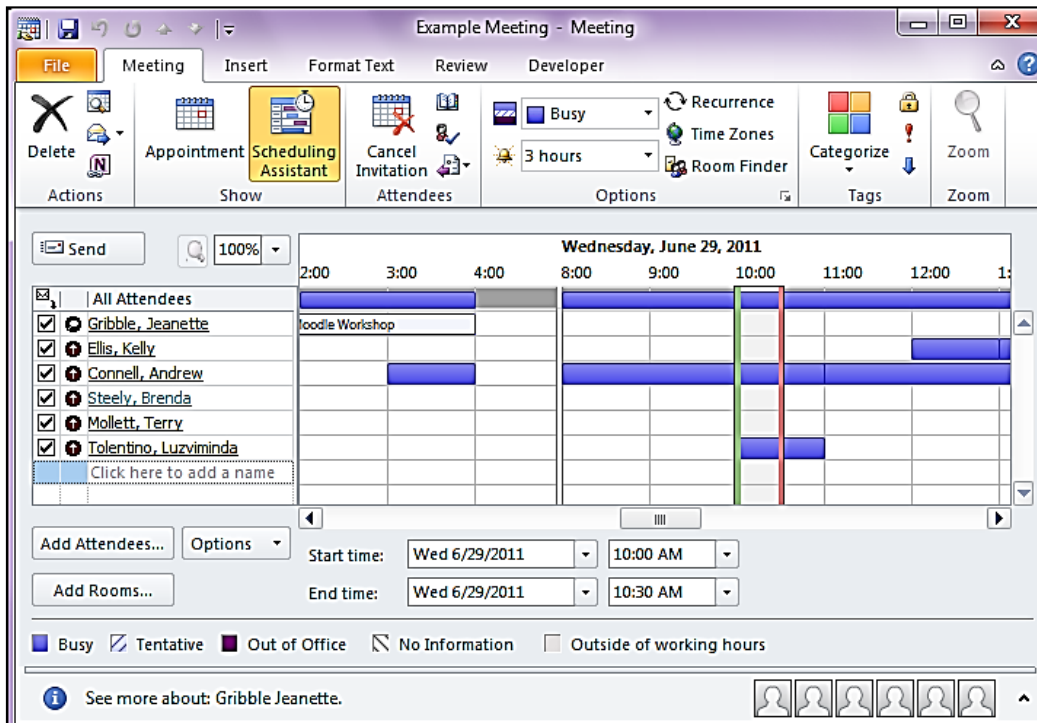
6. You can also add Attendees, in the click here to add name area. Click the check names icon from this view to fill in their email address on the exchange server.

7. To change an attendee's status, click the entry in the Attendance column next to the attendee's name and select **Required Attendee or Optional Attendee**.
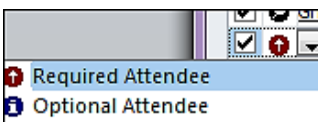

8. Scroll to find a desired meeting days & times are attendees are available. You can also use the pull-down menus, to select meeting days & times.
9. In the **Options** grouping you can add any reminder times.
10. The **Attendees** grouping, under the **Response Options** are two choices.
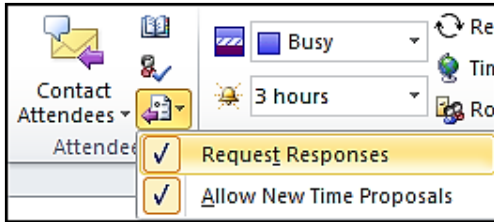
11. Click **Send.** Your Meeting Request is sent and the window closes.

Understanding Scheduling
The following will help you in determining attendee availability.
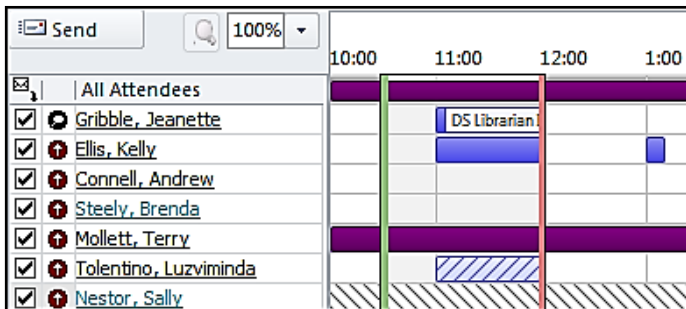
- The top line (dark gray) is the summary of everyone's schedule.
- Green (start) and red (end) bars appear within the day, marking off the meeting start and end time for your reference, respectively.
- Appointment time color indicators are as follows:

Blue - The time is marked as busy.
**Blue and White Striped -** The marked time is scheduled with tentative appointments.
Purple - Purple time is marked as out of office.
Black and White Striped - Marks time periods for which Outlook has no information. (this means the user is not an Outlook/Exchange user)

Responding to a Meeting Request

When you have been invited to attend a meeting, a tentative meeting will appear on your Calendar and the request will appear in your Inbox. Your reply to the meeting request will be sent only to the person who originated the request.

1. When the received invitation arrives in your email. It automatically fills your calendar with a tentative meeting in your calendar & on the email as shown below.
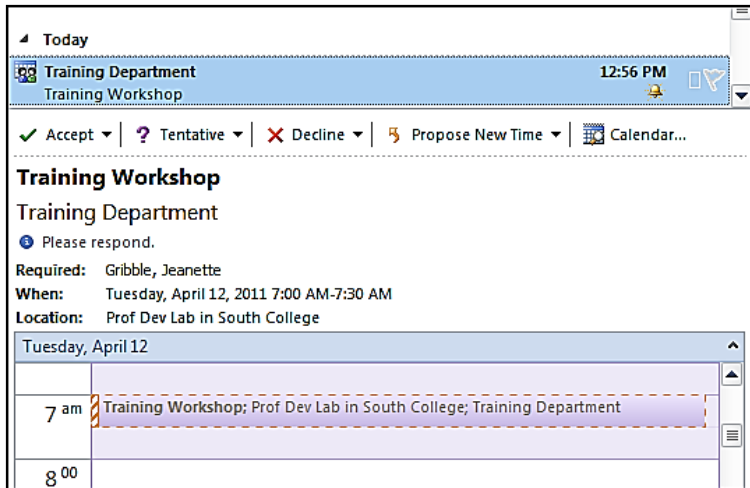
2. At the top of the message window, click the appropriate button (Accept, Tentative, Decline or Propose New Time)
3. A dialog box appears asking if you want to edit the response before sending, send the response now, or don't send a response.
4. Select the appropriate option & click **Send**. The response is sent and the window closes.

Working with Rescheduling Proposals

As the recipient of a new meeting request, you can propose an alternate time to the meeting organizer. When doing this, you can see the free and busy times of all those invited. The organizer can then choose to agree to your proposal and send out new invitations, or disagree and reply directly to you.

Proposing a New Time: As Recipient of a Meeting Request

As the recipient of a meeting request, one of your options is to propose a new time. When doing so, you are able to view the busy and free times of all attendees, making your selection of a new time more informed.

1. Open a received invitation & from the **Meeting** tab, in the **Respond** grouping, click **Propose New Time.** The schedule of attendees appears, showing busy and free times.
2. Select a new time. Click **Propose Time.** A new message window addressed to the meeting organizer opens.
3. **Optional**: Complete the body of the message with any desired notes or considerations. Click **Send.** The proposal is sent to the meeting organizer for review, and the original meeting is currently shown on your calendar as tentative.

Accepting a New Proposed Time: As Organizer of the Meeting

As the organizer of a meeting, you may receive proposals for a new meeting time. If you do not accept them, the original meeting time stands. If you accept a new meeting time, you can have Outlook notify the attendees and update their calendars.
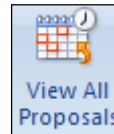
1. In the **Respond** grouping, click **Accept Proposal.** A new message window opens, addressed to all attendees.
2. **Optional**: Complete the body of the response with any desired notes or considerations
3. Click **Send Update.** The response is sent and the message window closes.

Declining a New Proposed Time: As Organizer of the Meeting

Outlook does not provide a specific function for declining new meeting time proposals. Instead, you are provided with a list of all new proposed times. From that list, you can select any new proposed time or the original time, and send a new invitation out to all invitees.

Note: If you choose to ignore new meeting time proposals, the original meeting time will remain as tentative on all invitees' Calendars.

1. Open the new proposal message

2. In the **Respond** grouping, click **View All Proposals** A new Scheduling Assistant window opens**.**
   Note: When viewing proposals, the Scheduling Assistant view will contain a list of all newly proposed times.

Proposed Date and Time	Duration	Proposed By
Monday, March 12, 2007 8:30 AM	1 hour	<Current Meeting Time>
Monday, March 12, 2007 9:30 AM	1 hour	Weiser, Jeri Lynn

3. To decline all new proposals and keep the original time,
   a. Click the proposal labeled **Current Meeting Time**
   b. Click **Send**

**Reschedule a meeting as Organizer of the Meeting**

You occasionally need to reschedule meetings. You might also need to reschedule a meeting if one or more department members can't attend during the scheduled time.

Rescheduling a meeting is easy in Outlook:

1. In Outlook, open the **Calendar** folder & locate & open the meeting on your calendar.
2. Click the **Scheduling** tab.
3. Select a new block of time for the meeting, and click **Save and Close.** You are notified that you have changed the meeting and asked whether you want to send the updated meeting to the attendees now.
4. Click **Yes** to send the update. The meeting request arrives in the each of the attendees' Inbox with **Update:** prefixed to the message subject line. The attendees can accept, tentatively accept, decline, or propose a new time, just as they were able to in the original meeting request.

Track meeting status as Organizer of the Meeting

1. Open your **Calendar** folder, and double-click the meeting on your schedule.
2. In the Show grouping, in the **Tracking** drop down arrow, click on **View Tracking Status**.
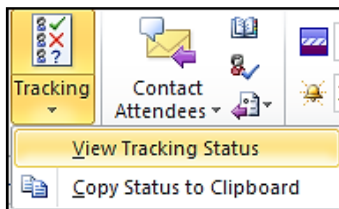
3. You'll see all of the attendees and their responses. You can also **Contact Attendees**, by clicking on the drop down arrow.
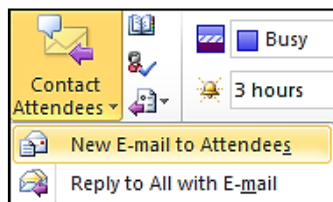
4. To specify whether you'd like to send further meeting requests to an attendee, click the envelope icon in the column to the left of the attendee's name and choose either **Send meeting to this attendee** or **Don't send meeting to this attendee.**
5. When you're finished working with the meeting form, click **Save and Close.**
6. If you have made changes to the meeting, you are asked whether you want to send the updated meeting request to the attendees. Click **Yes** to send the update or **No** if you want to make other changes and send the updated request later.