



Using the Microsoft® Outlook™ 2000 Calendar

White Paper



Published: October 1998

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Introduction

In order to remain competitive, a company must make the most of its employees' valuable time. Workers need to manage their own calendars efficiently and, in addition, they may need to manage any number of public calendars. They need to share their calendars with people inside and outside the company easily and, in order to do so, they need the best scheduling and calendaring tool to produce the best results on time. Microsoft® Office 2000 provides that tool: the Outlook Calendar.

This white paper is designed to accomplish the following:

- Introduce readers to the Outlook Calendar in Microsoft Office 2000
- Describe the new features in the Outlook Calendar
- Demonstrate how the Outlook Calendar can help organizations function smoothly
- Show how the Outlook Calendar is easy to administer

This white paper will be helpful to people interested in using Microsoft Office 2000 as the calendar and scheduling solution for their organization. Seasoned users of Outlook, as well as those who have never used Outlook, will find this information useful.

Outlook Calendar Overview

The Outlook Calendar is the calendar and scheduling component of Outlook, the premier Microsoft messaging and collaboration client. The Outlook Calendar is not a separate program. It is a scheduling program, within Microsoft Outlook, that is fully integrated with e-mail, contacts, and other features.

Basic Features of the Outlook Calendar

Before presenting some of the new and more powerful features of the Outlook Calendar, it is worth first describing the basic features, which can be grouped into four categories: (Users experienced with the Outlook Calendar may want to skip this section.)

- *Creating appointments and events.* With the Outlook™ messaging and collaboration client, the creation of appointments and events is effortless. Just as a person pencils in an appointment in a paper calendar, a user of Outlook can click on any time slot in the Outlook calendar and just start typing. (See Figure 1.0 below.) If a user needs to set another option, such as setting a reminder, he/she simply opens an appointment (by double-clicking on it), and then is just a click away from many useful features. A user of Outlook can also, with just a few clicks, create all-day events, such as vacations or business trips, and recurring items, such as a weekly business meeting or birthdays.

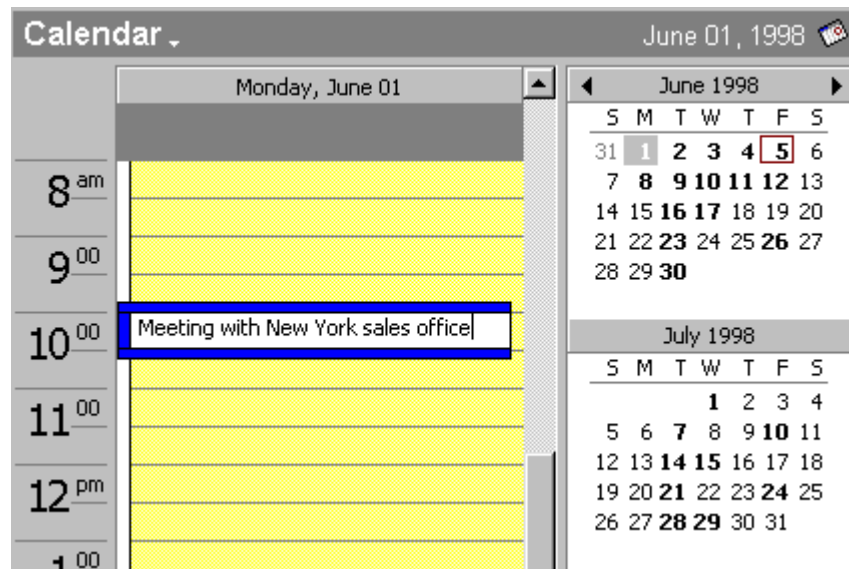


Figure 1.0: Users can enter in appointments just as they would with a paper calendar.

- *Viewing and managing a calendar.* Outlook offers many useful ways to view and manage a calendar. Users can view a single day, week, month, or even an entire year of their calendars at once. The Work-Week view offers users a great way to see at a glance how busy or free their week is. (See Figure 1.1 below.) Users can view their calendars in other ways as well--for instance to see a list of birthdays or a list of upcoming appointments. For users who work across time zones, the Outlook Calendar can also display two different time zones simultaneously.

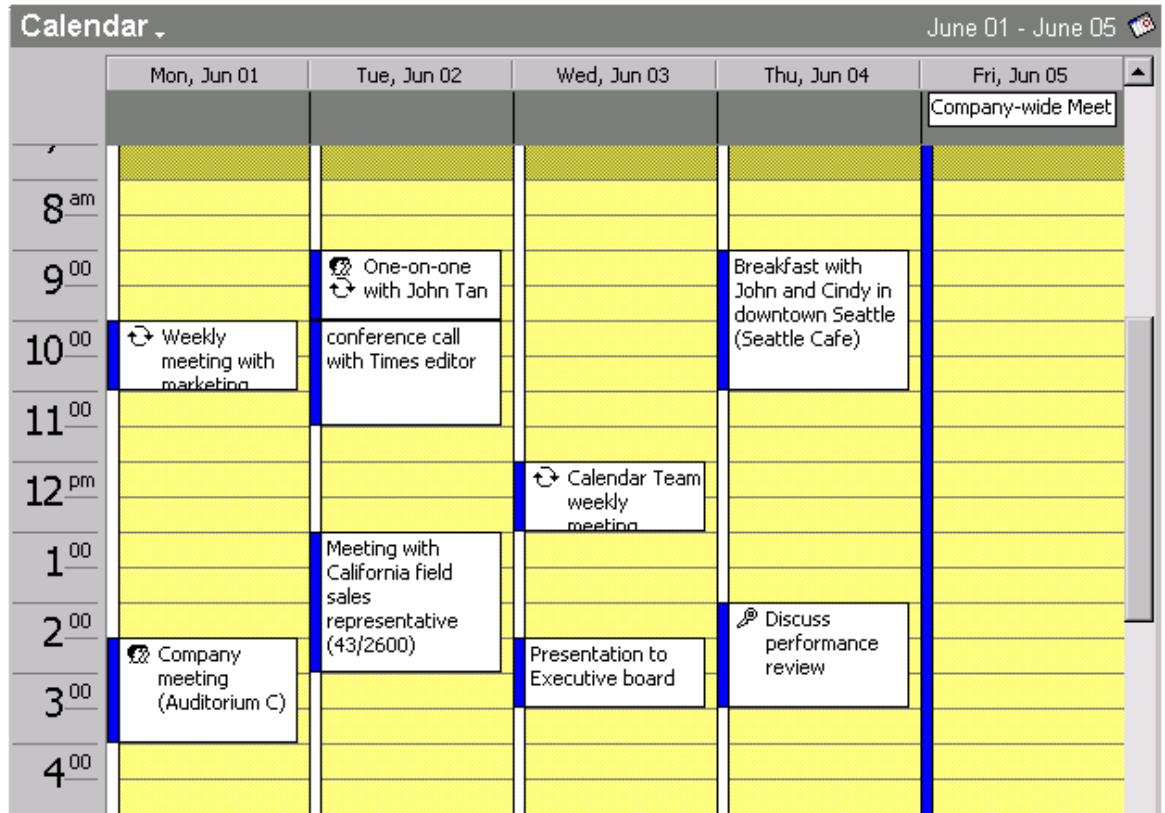


Figure 1.1: Users can see at a glance how busy or free their week is.

- Organizing meetings.** The tight integration of the Outlook Calendar and E-mail makes organizing meetings easy. The meeting organizer simply selects a time on his or her calendar, creates an appointment, and selects people to invite. Outlook will help the organizer find the earliest time at which all the people are free. (See Figure 1.2 below.) Once the meeting notice is sent to invitees via e-mail, they will receive meeting requests in their Inboxes. When users open a meeting request, Outlook notifies them if the meeting conflicts with an existing appointment on their calendars, and they can respond by clicking a single button. (See Figure 1.3 below.) The meeting organizer can track who has accepted or declined simply by opening the meeting. (See Figure 1.4 below.)

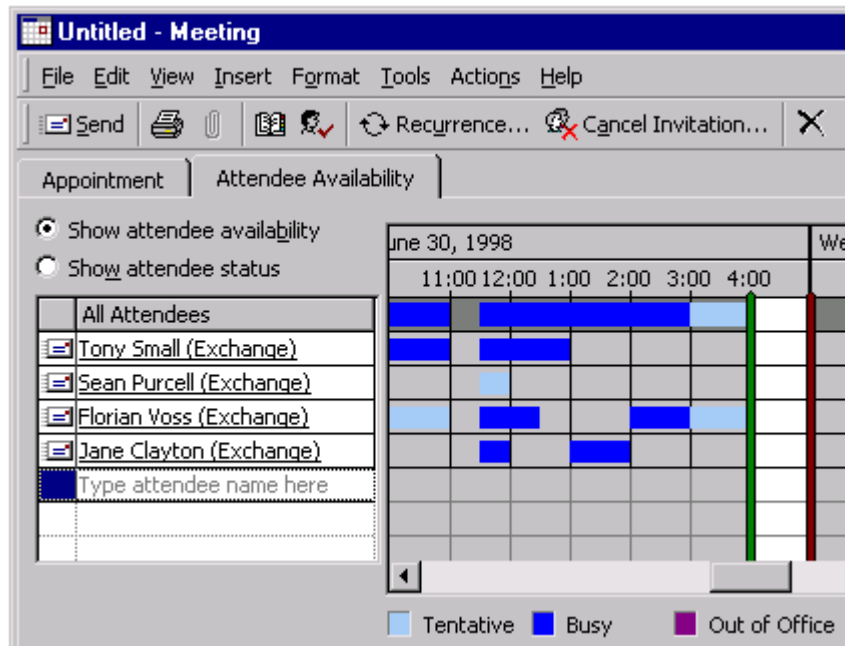


Figure 1.2: Outlook helps the organizer find the earliest time when all the invitees are free.

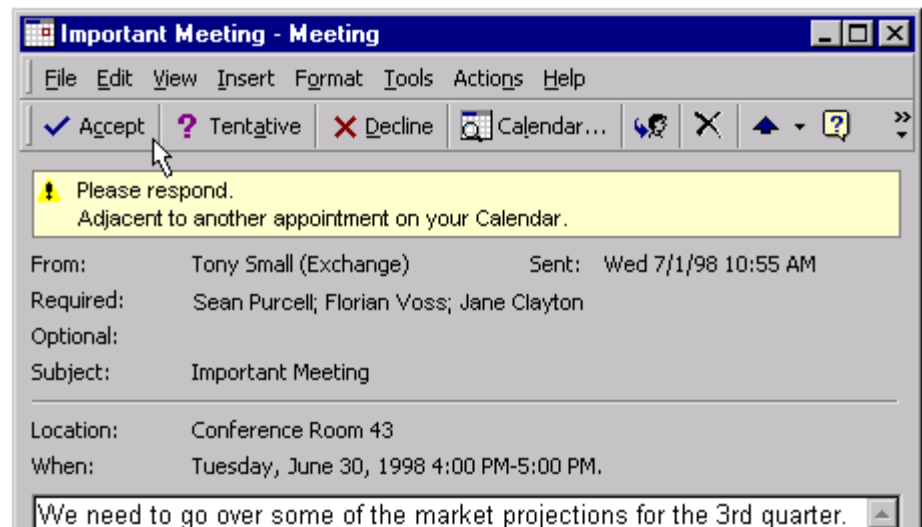


Figure 1.3: The meeting request shows the invitee that he/she has another meeting scheduled right next to this one. The user can respond with "Accept", "Tentative", or "Decline" with a single click.

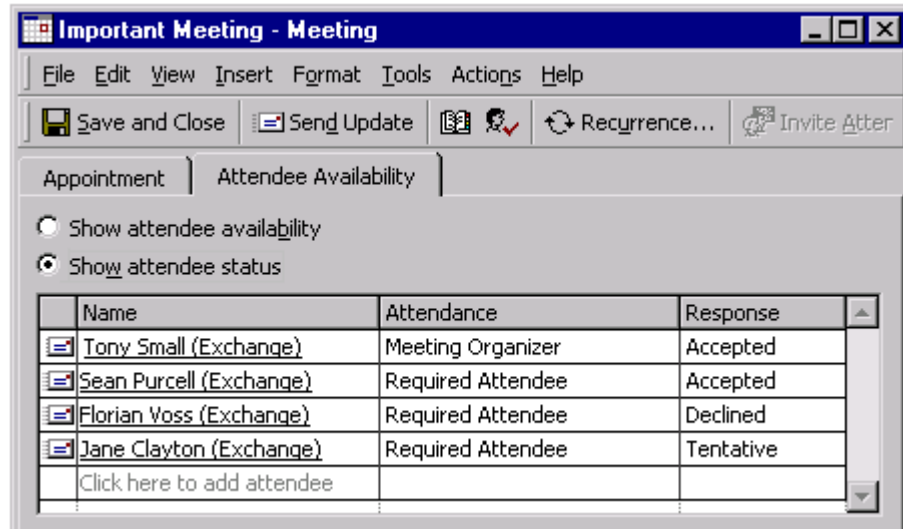


Figure 1.4: By opening the meeting, the organizer can track who has accepted, who has declined, and who is not sure about attending the meeting.

- *Managing another user's calendar.* The Outlook delegate feature allows a user--an administrative assistant, for example--to manage another user's calendar easily. In a typical scenario, a manager will make his/her assistant a delegate. (See Figure 1.5 below.) The assistant can view and organize the manager's calendar by creating, moving, or deleting appointments, as well as organizing meetings on the manager's behalf. With the delegate feature, an assistant can easily manage another user's calendar from his or her own copy of Outlook. (See Figure 1.6 below.)

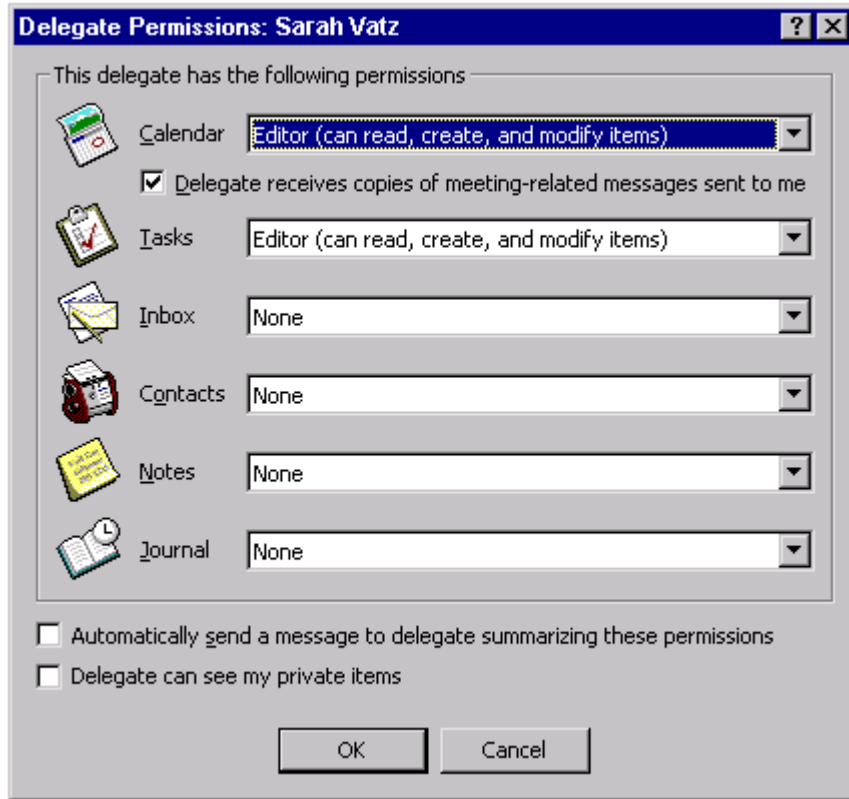


Figure 1.5: A manager can easily make another user his or her delegate. Options allow the manager to specify limited or unlimited access.

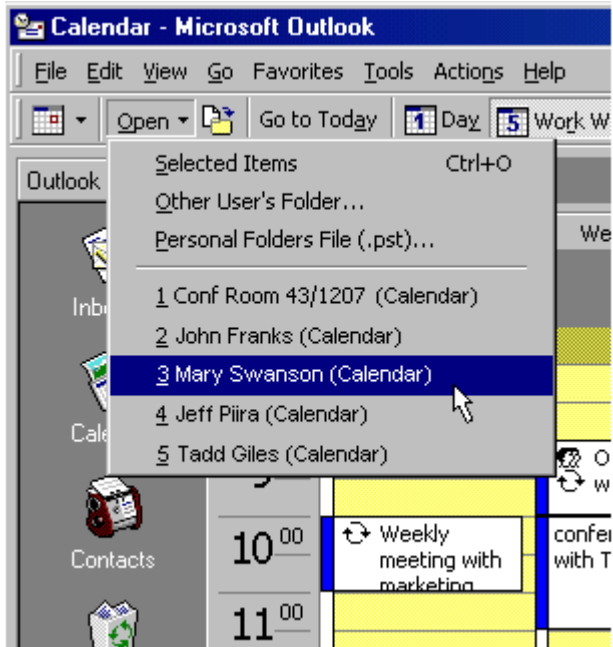


Figure 1.6: From the Open command, users are a step away from any one of the schedules they manage.

New Features in the Outlook 2000 Calendar

The improvements to the Calendar in Outlook 2000 enhance many parts of the basic functionality described in the previous section. The Outlook team chose these improvements in response to customers' most frequent and urgent requests.

The improvements to the Calendar in Outlook 2000 can be grouped into three categories:

- *Viewing and Printing Improvements.* Outlook 2000 has added features to the Calendar views and printouts, including the following:
 - New ScreenTips allow users to see appointment subjects and details without having to double-click and open each appointment.
 - A new Calendar background color makes it easier to distinguish between free and busy times in people's schedules.
 - Users can print out their calendars and choose not to print the details of appointments they mark as private.
 - Users can print the details of a range of appointments, and all calendar printouts support wordwrapping.
- *Meeting Improvements.* Organizing and keeping track of meetings is easier with Outlook 2000:
 - Users can expand distribution lists from within a meeting planner. This allows users to see when individual members are busy and alter the invitation accordingly.
 - Outlook 2000 supports iCalendar, an Internet standard allowing users to easily organize meetings with users of other clients that support iCalendar.
 - Organizations can schedule resources (such as conference rooms) without having an Outlook client run online for each resource.
- *Features for Administrative Assistants.* New features make it easier to manage Calendars:
 - Outlook 2000 saves the names of the last 10 Calendars opened in the **File** menu, making it easy to reopen other users' calendars.
 - Users can specify whether or not their delegates (assistants, for example) can see their private appointments.
 - Users can publish their Calendars to the Web, allowing them to easily communicate events and schedules inside and outside the organization.

The next section will demonstrate how the Outlook 2000 Calendar, with many of these new features, can be used to help organizations work more effectively.

Solutions: Improving Your Business with the Outlook 2000 Calendar

The Outlook 2000 Calendar offers powerful features that can be used to improve your business. This section shows how companies can take full advantage of some of these features.

Using iCalendar to coordinate with people using other programs

Outlook 2000 supports iCalendar, an emerging Internet standard that specifies the format and exchange of scheduling information. With Outlook 2000, users will be able to check the schedules of and exchange meeting requests with users of any programs that also support iCalendar.

Example: Employees of Cot Hills Inc. use several different calendar programs. With iCalendar, Cot Hills employees who use Outlook 2000 can even check the calendars of those coworkers who do not use Outlook to see when they are free, and they can exchange meeting requests with these coworkers. They can also easily schedule meetings with people using other calendar programs in other organizations anywhere in the world. (See Figures 2.0 and 2.1 below.)

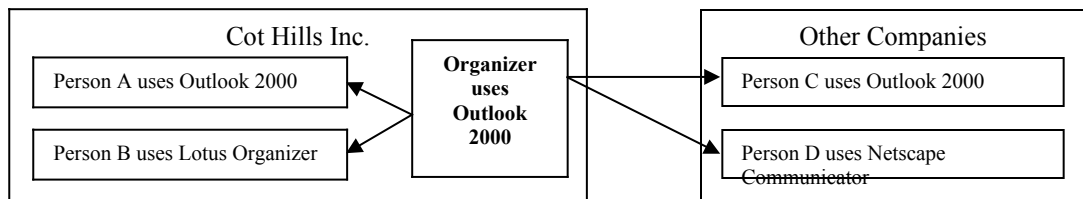


Figure 2.0: With iCalendar, users can schedule meetings with people who do not use Outlook and who are not in the same organization.

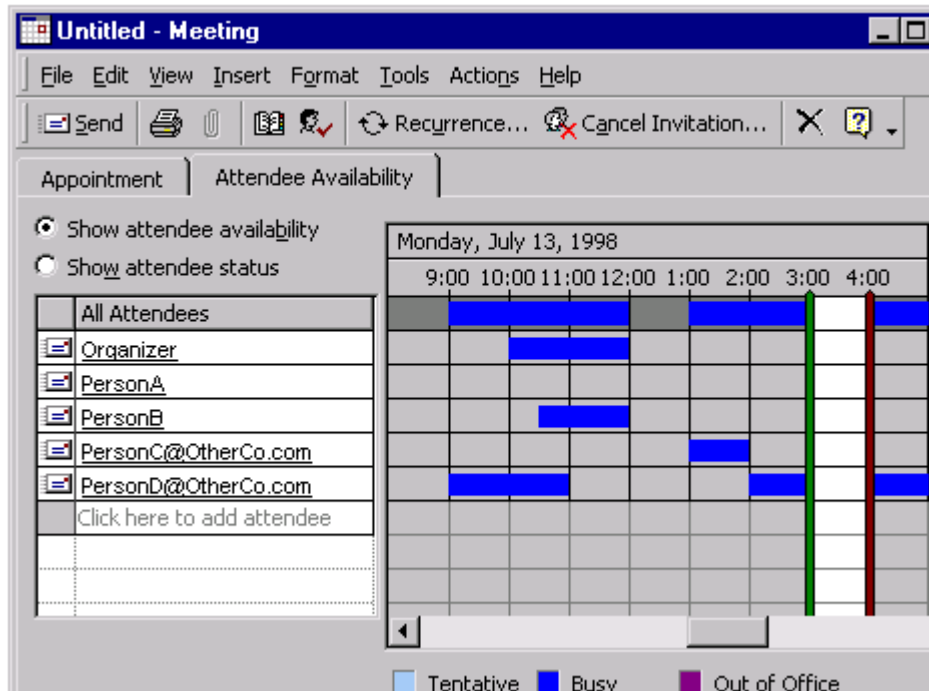


Figure 2.1: Users can see when people using other iCalendar programs are free or busy.

Note: Sending and receiving meeting requests in iCalendar format requires that Outlook be installed in Internet Only Mode.

Using Save Calendar as Web Page to advertise important events

With Outlook 2000, users can save their calendars as Web pages. From any calendar (users can access several other calendars in addition to their personal calendar), users choose **Save as Web Page** from the **File** menu, set a few options (see Figure 2.2 below), and Outlook transfers all the appointments and meetings to a series of nicely formatted documents in HTML.

Example: Laura Jennings, an employee of Chairs, Inc., is responsible for publicizing a calendar of events sponsored by her company. With her previous calendar program, Laura created a plain list of events and added that list to the Chairs, Inc. home page. With Outlook 2000, Laura keeps these events in a separate calendar in Outlook, and saves the calendar as a Web page in one step. The published calendar, in HTML format, is a pleasure to view and navigate, and it nicely complements the Chairs, Inc. Web site. (See Figure 2.3.)

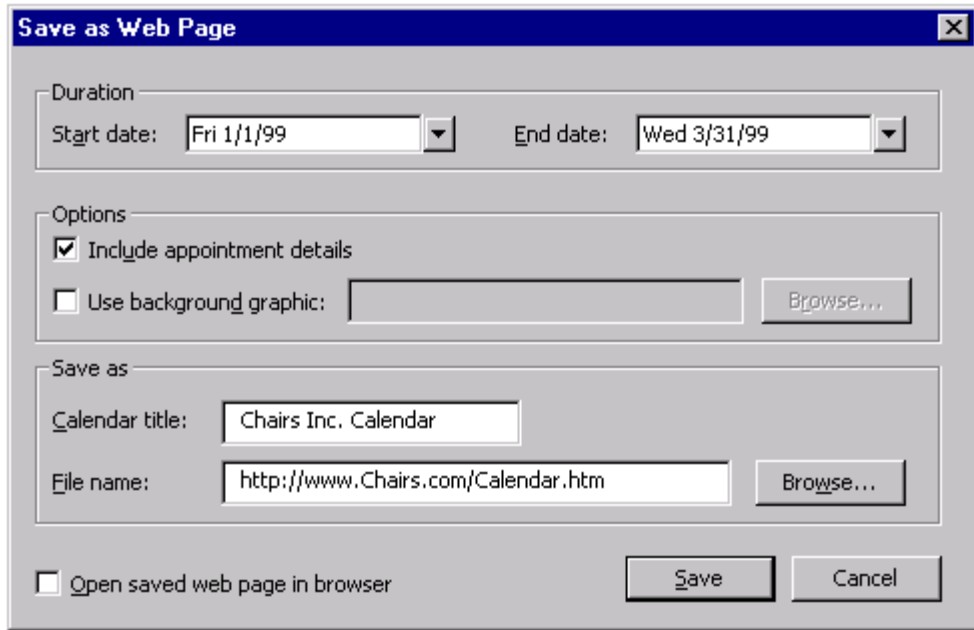


Figure 2.2: Users can specify how they want their calendars presented on the Web.

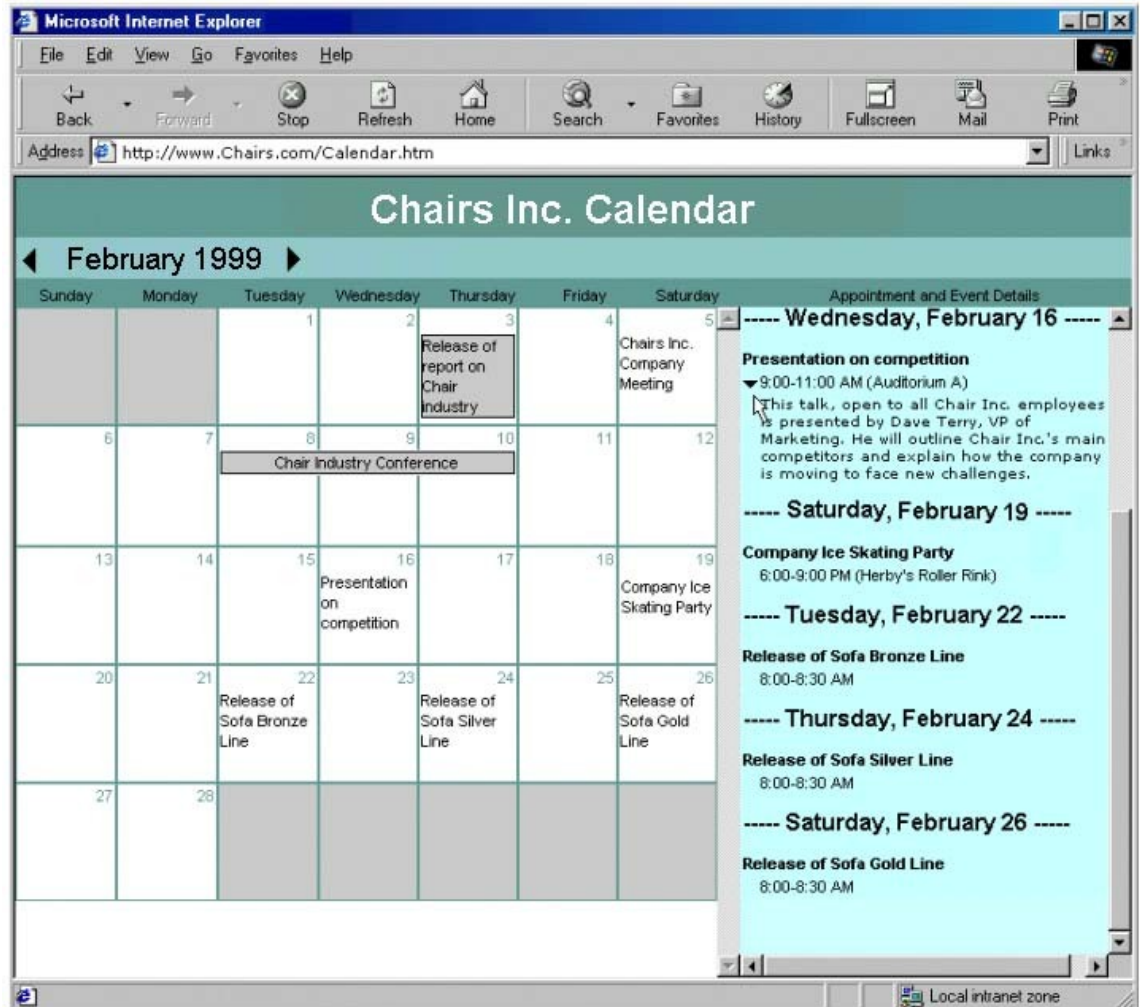


Figure 2.3: The published calendar. Clicking on an event shows the details of that event on the right side.

Using Net Folders to share calendars

The Net Folders feature allows users to easily share information whether they are running Microsoft Exchange Server or another server. To share a folder (which can include messages, tasks, or calendar appointments), the user chooses **Share** from the **File** menu. Subsequent changes to the folder are then broadcast to users via e-mail. (The e-mail does not appear in users' Inboxes, but is instead used by Outlook to update the Net Folder on each user's computer. With Net Folders, users can share information with anyone available on e-mail.

Example: Employees at Yogurt-to-go need to share a corporate events schedule. The office administrator allows employees to do this by creating a "Yogurt-to-go Calendar" Net Folder. Each person gets a copy of the "Yogurt-to-go Calendar" Net Folder. Within that calendar, employees enter company events, company deadlines, birthdays, anniversaries, or any other occasion they would like to share. Each time an appointment is added or changed, each user's shared calendar or Net Folder will be updated. With Net Folders, Outlook 2000 allows

employees at Yogurt-to-go to view and change a calendar that is shared throughout the company.

Note: The Net Folders feature is also available in Outlook 98.

Using the Delegate feature to track a manager's schedule more easily

The Delegate feature allows a user to manage other people's calendars from within Outlook. This feature is typically used in an assistant-manager relationship in which one of the responsibilities of the assistant is taking care of the manager's schedule.

After an assistant is marked as a delegate from his or her manager's computer, all meeting requests sent to a manager also appear in the assistant's Inbox. The assistant can accept meetings, enter appointments, and organize meetings on a manager's behalf. (See Figures 2.4 and 2.5 below.) Each of these actions can be performed in a matter of seconds, and all are reflected immediately in a manager's Outlook Calendar.

Example: Before using Outlook, assistants at Gallery Co. kept track of their managers' calendars with pencil and paper. Because the managers have busy schedules and because meetings are moved frequently, tracking just one manager's schedule in a clear manner was a difficult task. Managers were also unable to check their current schedules without speaking directly with their assistants, which caused problems when their assistants were unavailable.

Since installing Outlook, assistants at Gallery Co., have found it easier to track managers' schedules. Assistants keep track of everything from Outlook Calendar, which makes even the busiest and most volatile schedules easy to view and manage. When their assistants are unavailable, managers can check and make adjustments to their own calendars from their own computers.

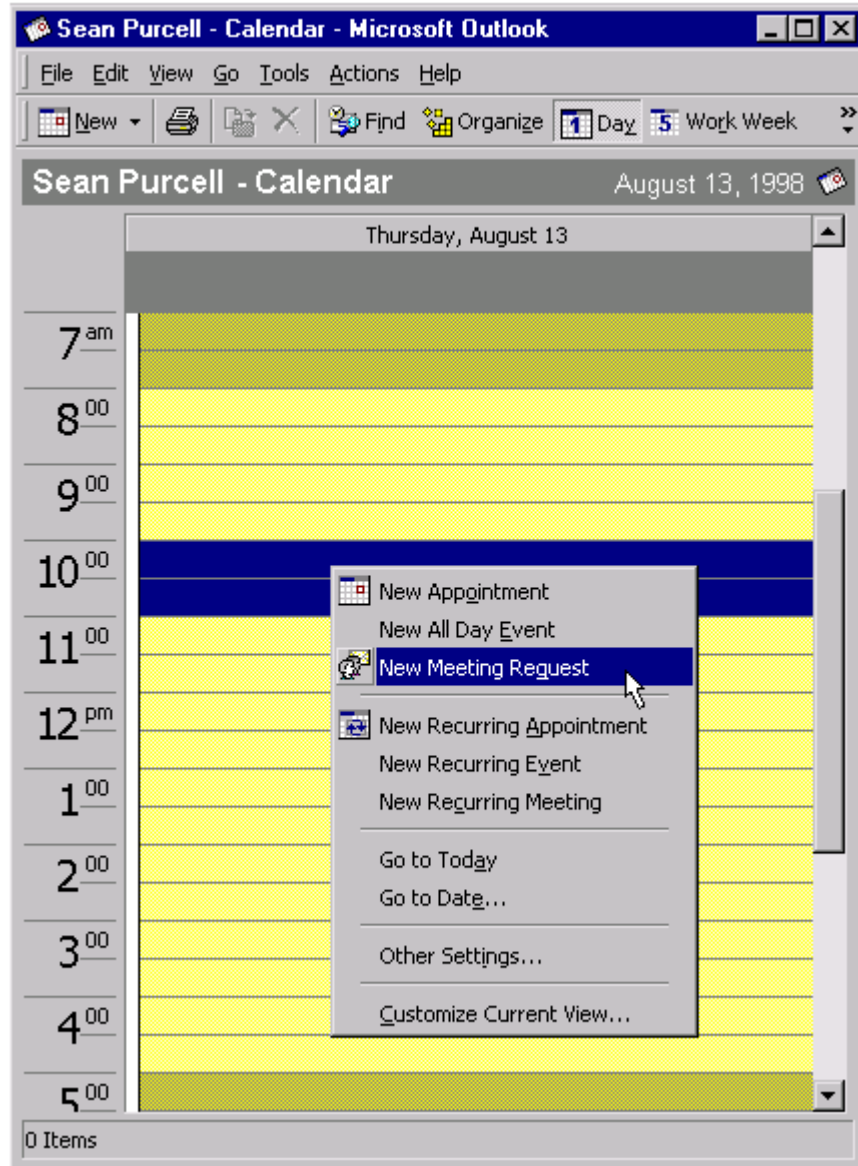


Figure 2.4: In this example, assistant John Smith opens manager Sean Purcell's calendar to select a time for a meeting.

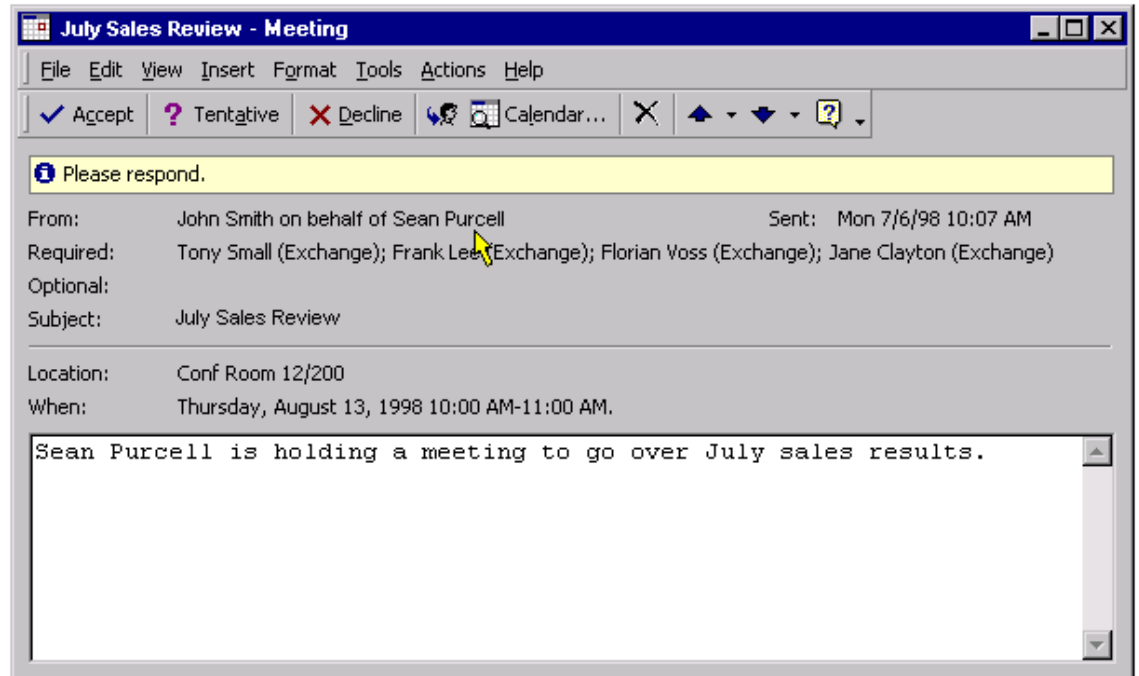


Figure 2.5: When invitees receive the meeting request, they can see that it was sent by the assistant on behalf of the manager.

Note: The Delegate feature requires that Outlook run in Corporate/Exchange mode with a Microsoft Exchange Server. The Delegate feature is also available in Outlook 97 and Outlook 98.

Using Direct Booking to schedule conference rooms

Direct Booking allows a company to use accounts on the Exchange server to schedule resources (such as conference rooms, audio-visual equipment, etc.). To schedule a resource, the user simply invites the resource to a meeting. When the user sends the meeting request, Outlook opens the resource's calendar, checks its availability, and enters the meeting on the resource's calendar. Because the task is done automatically, resource scheduling does not require administrative supervision or a separate computer to be running for each resource.

Example: The administrator at Dog Food, Inc., needs to set up an efficient way to allow employees to schedule the company's conference rooms. The administrator first sets up each conference room as an account on the Exchange server, and then gives permissions to reserve each conference room to all employees (the administrator can set which employees can reserve each resource). Outlook does the rest: when employees need a conference room, they simply send a meeting request to an available room, and Outlook books it for them.

Note: The Direct Booking feature requires that Outlook run in Corporate/Exchange mode with a Microsoft Exchange Server.

Using distribution lists to organize conference rooms

Companies can organize any number of conference rooms into distribution lists. Improvements to the meeting planner allow people to use these distribution lists to find the best available room for a meeting.

Example: Big Cars, Inc., a large corporation, needs to organize its myriad conference rooms in a way that makes it easy for employees to find and book the right room for each meeting. To accomplish this, the conference rooms are organized into distribution lists based on size and location. The name of each distribution list takes the following form:

"Conf Room" + Floor + Number of People

For example, "Conf Room 5/20" would be a distribution list that includes all the conference rooms on the fifth floor that can accommodate 20 people.

After the distribution lists are set up, Outlook 2000 makes it easy to find the best room for any given purpose. For example, when an assistant needs a conference room on the first floor that can accommodate 10 people, he/ she simply adds the name "Conf Room 1/10" to the meeting invitee list. The assistant then uses the enhanced AutoPick feature to find the first time when all the invitees and just one room are free. (See Figure 2.6 below.) Outlook will expand the distribution list and send the meeting request to the first available room. (See Figure 2.7 below.)

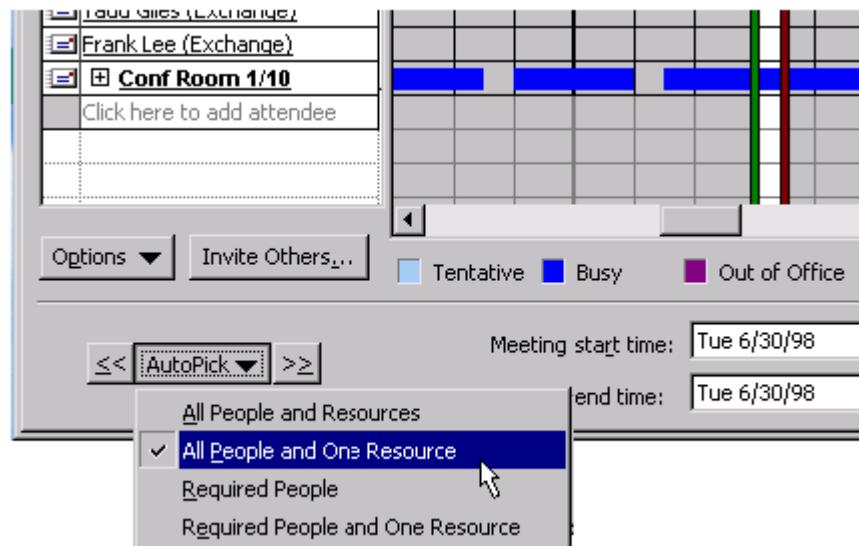


Figure 2.6: The AutoPick feature makes it easy to find the first available room for a meeting.

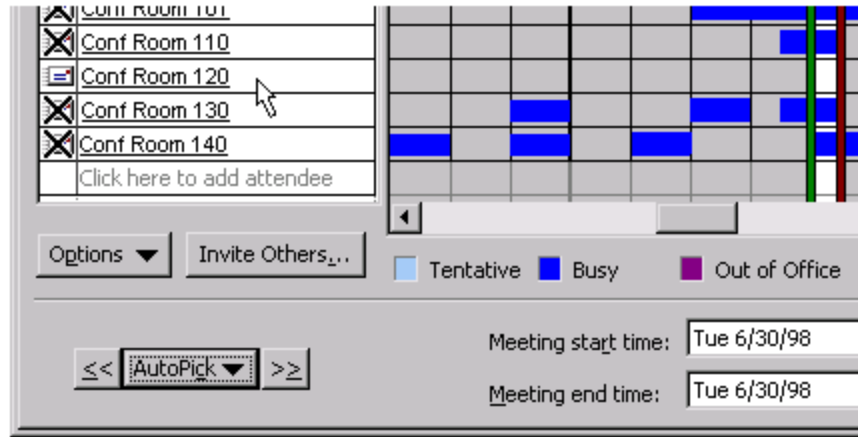


Figure 2.7: AutoPick expands the distribution list and sends a meeting request to the first available room.

Using Folder Home Pages to communicate important Calendar information

Outlook takes advantage of the presentation and interactive power of the Web by allowing a Web page to be associated with any local or Exchange Server folder. The page associated with a folder and any linked pages are displayed inside Outlook. Folder Home Pages give application designers and administrators unlimited flexibility to add instructions, tips, policies, views or reports to any folder.

An administrator can set up Folder Home Pages so that when users view their Calendars, a specific Web page appears inside Outlook. Administrators can then easily communicate calendar specific information, such as policy changes, to every employee in an organization.

Example: Continuing with the Big Cars, Inc., scenario, the administrator needs to let employees know which conference rooms they have permission to reserve as well as how to select these conference rooms. The administrator creates a Web site containing this information, and other useful information, then associates that site with the employees' Calendars. When employees open their Calendars, they see the Web site and can refer to it later as needed. (See Figure 2.8 below.)

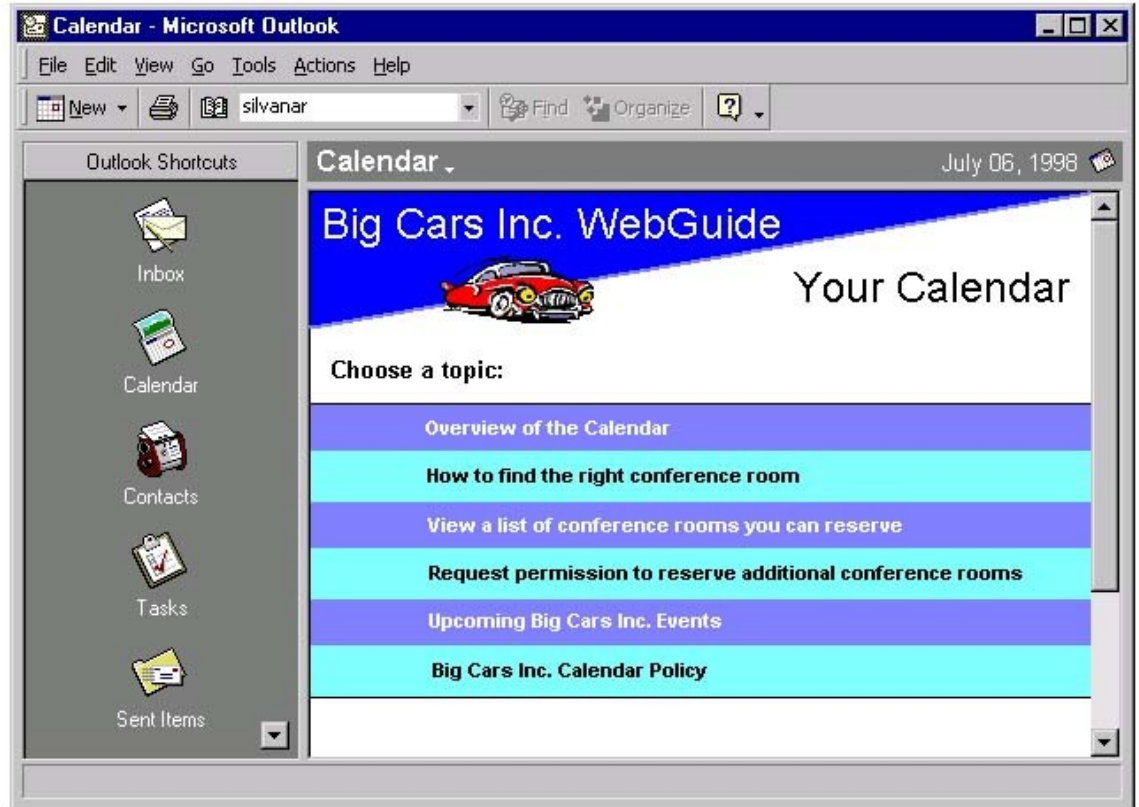


Figure 2.8: A Folder Home Page allows administrators to communicate context-sensitive information from within Outlook.

Administering the Outlook Calendar

As part of the Microsoft Office 2000 suite, Outlook 2000 is easy to deploy to any number of machines, from 1 to 100,000. Administrators can control the Outlook menus and toolbars, turn features on and off, and adjust preferences for all their users. Many features of Office 2000 and Outlook 2000 make administering the Calendar easy.

Migrating to Outlook

Users migrating to Outlook 2000 need to transfer their schedules from their previous calendar programs. Outlook 2000 allows for easy importing of calendar files from a variety of such programs, including Lotus Organizer, Starfish Sidekick, and NetManage Ecco Pro.

Administrators can also hide setup options from their users to ensure program consistency and avoid the costs of user setup mistakes. In a common scenario, an administrator chooses setup options that allow Outlook to work best with the company's Exchange servers. Users can then install Outlook without having to make any choices. The best ones have already been made for them by the administrator.

Migrating from Schedule+

Migrating from Microsoft Schedule+, the precursor to Outlook, is easy. When Outlook starts for the first time, it looks for Schedule+ files on the client and server and transfers all the user's appointments to Outlook automatically.

Outlook also allows users to continue using Schedule+ as their calendar, if they want to. By setting a Schedule+ option, users can continue to schedule appointments and organize meetings within Schedule+. Administrators can disable this option if they want to ensure a complete migration to the Outlook Calendar.

Getting Information to Users: Customizable Alerts



Figure 3.0

The Outlook Calendar still uses alert dialogs to alert users to errors and other situations, but with Office 2000 Customizable Alerts, administrators can avoid costly calls (and complaints) to company support lines. An administrator can, for example, extend the dialog a user sees when trying to book a room that he or she does not have permission to reserve.



Figure 3.1: Administrators can extend Office dialogs to cut down on support costs.

In this example, clicking the **Arcadia Help** button takes the user to a Web site created by the administrator that explains what rooms the user can book, along with instructions on filling out an e-mail form to request permission to book other rooms.

For more information: <http://www.microsoft.com/office/>



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