



Microsoft® Office Outlook® 2007 Inside Out

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Scheduling Appointments

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For most of us, a calendar is a basic tool for organizing our lives, both at work and at home. With the calendar in Microsoft® Office Outlook® 2007, you can schedule regular appointments, all-day and multiday events, and meetings. You can view your schedule almost any way you want. In addition, you can share your calendar with others, which is a big help when scheduling organizational activities.

This chapter first describes the calendar and explains how to work with the basic Calendar folder view. Then you'll learn how to schedule and work with appointments and events. You'll also find information about the more advanced view options for the calendar and about how to share your calendar and free/busy information and view different time zones.

Both this chapter and the next focus on the features available in the Office Outlook 2007 Calendar folder. This chapter covers appointments and events; the following chapter discusses meetings and resources.

Calendar Basics

The Outlook 2007 Calendar folder provides a central location for storing vast amounts of information about your schedule. Figure 20-1 shows a basic one-day view of a calendar. You see this view when you first click the Calendar icon in the Navigation Pane to open the folder. This example calendar contains no appointments yet, and no tasks are listed in the Daily Task List.

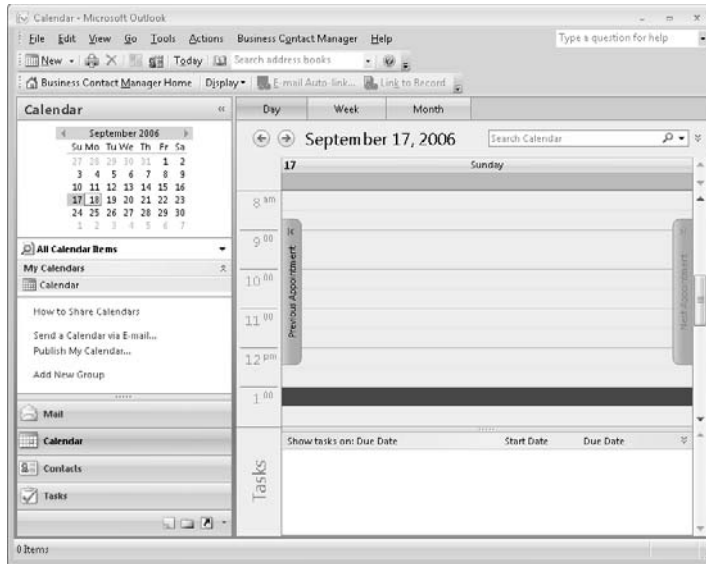


Figure 20-1. The default one-day view of the Outlook 2007 calendar.

Understanding Calendar Items

The Outlook 2007 calendar can contain three types of items: appointments, events, and meetings.

- An *appointment*, which is the default calendar item, involves only your schedule and time and does not require other attendees or resources. The calendar shows appointments in the time slots corresponding to their start and end times.
- When an appointment lasts longer than 24 hours, it becomes an *event*. An event is marked on the calendar not in a time slot, but in a banner at the top of the day on which it occurs.
- An appointment becomes a *meeting* when you invite other people, which requires coordinating their schedules, or when you must schedule resources. Meetings can be in-person meetings established through Outlook 2007 meeting requests. (Meetings can also be set up online using Microsoft Office Live Meeting, which is a separate application.) In this chapter and in Chapter 21, we'll look at meeting requests in Outlook 2007.

For in-depth information about meetings initiated in Outlook 2007, see Chapter 21, "Scheduling Meetings and Resources." For information about online meetings, see "Using Microsoft Office Live Meeting" in Chapter 39.

You can create an appointment in any of these ways:

- Choose File, New, Appointment.
- When the Calendar folder is open, click the New button on the Standard toolbar.
- When any other Outlook 2007 folder is open, click the arrow next to New on the toolbar, and then choose Appointment.
- Click a time slot on the calendar, and simply type the subject of the appointment in the time slot.

For detailed information about creating appointments and using the appointment form, see “Working with One-Time Appointments” later in this chapter.

Using the Time Bar

When you choose a calendar display of 14 or fewer days, the Time Bar appears, displaying 30-minute time increments by default. Figure 20-2 shows the Time Bar set to 30-minute increments, with a 30-minute appointment on the calendar.

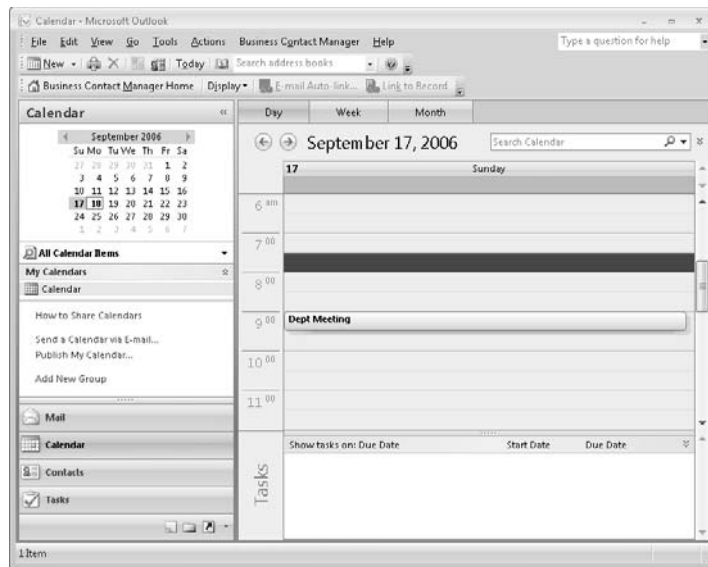


Figure 20-2. By default, the Time Bar is set to display 30-minute increments.

You can set the Time Bar to display different time increments. To do so, begin by right-clicking the Time Bar to display the shortcut menu shown in Figure 20-3.

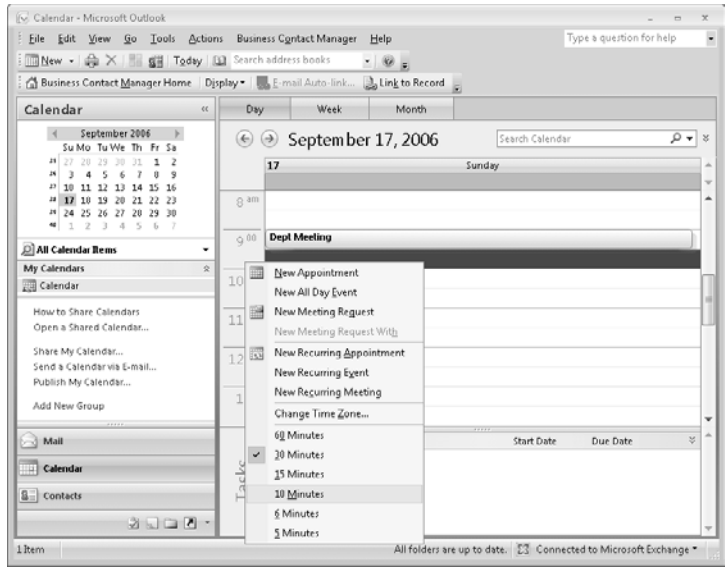


Figure 20-3. Use the Time Bar shortcut menu to change the time increment.

If you want to change the time scale to 10 minutes, select 10 Minutes; subsequently, the 30-minute appointment takes up three time intervals instead of one, as shown in Figure 20-4.

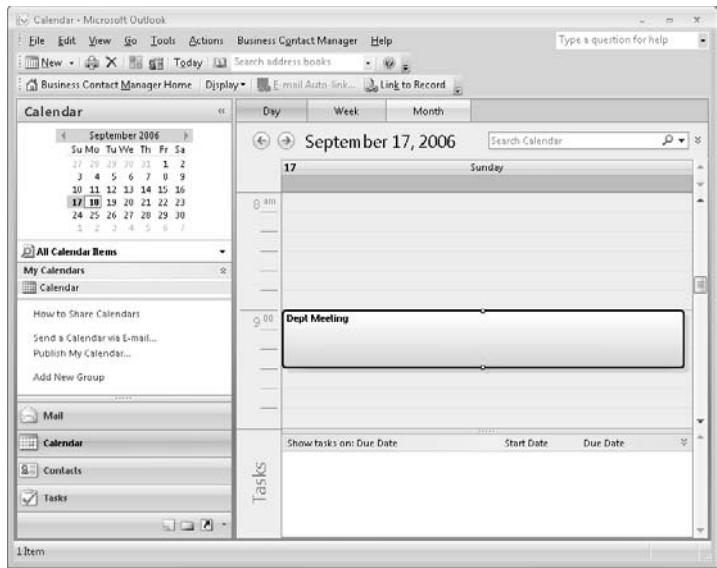


Figure 20-4. The Time Bar has been changed to display 10-minute increments.

To choose a 60-minute interval, right-click the Time Bar, and then select 60 Minutes; Figure 20-5 shows the result. Note that when an appointment takes up less than a full Time Bar increment, as in this example, the scheduled time of the appointment is displayed as a ScreenTip when you hover the mouse pointer over the appointment subject on the calendar.

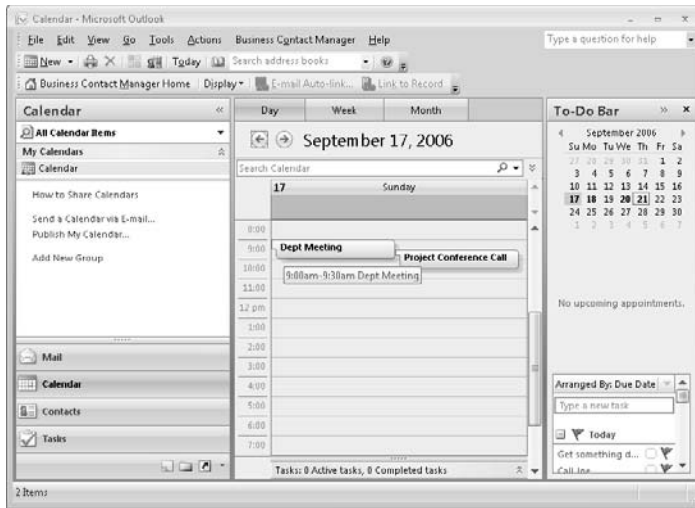


Figure 20-5. The Time Bar is set to 60-minute intervals and the time is displayed when you hover the mouse pointer over the appointment.

Outlook 2007 places appointments side by side on the calendar when they are scheduled in the same time interval (as shown in Figure 20-5).

Using the Date Navigator

The Date Navigator is shown as a small calendar at the top of the Navigation Pane. It has several important uses. For example, you can use it to select the day to view on the calendar—in effect, jumping from one date to another. When you click a day in the Date Navigator, Outlook 2007 displays that day according to how you have set the view (by using the Day, Work Week, or Week tabs:

- In Day view, the selected day is displayed.
- In Work Week view (five days by default—configurable by choosing Tools, Options, Calendar Options), Outlook 2007 displays the week containing the day that you clicked in the Date Navigator.
- In Full Week view (seven days), the calendar switches to a one-day view for the date you click.

Note

When the To-Do Bar is displayed, the Date Navigator appears at the top of the To-Do Bar. When you close the To-Do Bar, the Date Navigator moves to the top of the Navigation Pane.

By clicking the right and left arrows next to the month names in the Date Navigator, you can scroll forward and backward through the months.

For more information about the Day, Work Week, Week, and Month views, see “Setting the Number of Days Displayed” on the facing page.

Another use of the Date Navigator is to denote days that contain scheduled items. Those days appear in bold type; days with no scheduled items appear as regular text. This allows you to assess your monthly schedule at a glance.

Last, you can use the Date Navigator to view multiple days on the calendar. In the Date Navigator, simply drag across the range of days you want to view; those days will all appear on the calendar. For example, Figure 20-6 shows what happens when you drag across three days in the Date Navigator. You can also view multiple consecutive days by clicking the first day and then holding down the **Shift** key and clicking the last day. To view multiple nonconsecutive days, click the first day that you want to view and then hold down the **Ctrl** key and click each day that you want to add to the view.

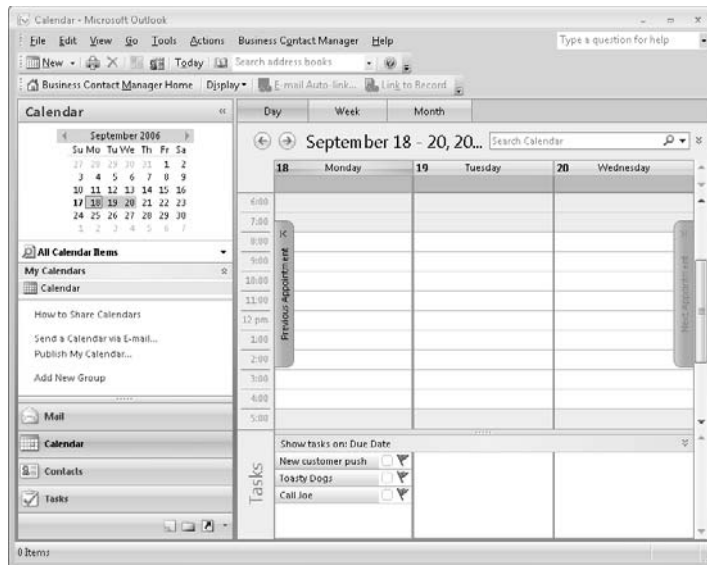


Figure 20-6. You can view multiple days by selecting them in the Date Navigator.

Using the To-Do Bar

The To-Do Bar replaces the old Microsoft Outlook TaskPad and offers an easy way of working with tasks from the Calendar folder. The To-Do Bar is not turned on by default, but it can be enabled using the To-Do Bar command on the View menu. The To-Do Bar displays existing tasks from the Tasks folder and also allows you to add new tasks. Adding a new task is as simple as clicking in the Task List area of the To-Do Bar and typing the task subject. Double-click the task item to open the task form if you'd like to add more details. When you create a task in the To-Do Bar, Outlook 2007 automatically adds it to the Tasks folder.

One of the main advantages of having the To-Do Bar in the Calendar folder is that it enables you to assess your schedule and fit in tasks where appropriate. When you drag a task from the Task List to the calendar, an appointment is added. When you double-click the appointment, the appointment form appears, with the task information filled in. You need only set the schedule information for the appointment and save it to the calendar (as explained in “Working with One-Time Appointments” on the next page).

Setting the Number of Days Displayed

You can set the number of days displayed in the calendar in several ways. One way is to use the Date Navigator, as discussed earlier. The easiest way, however, is to use the appropriate tab in Calendar view. To select the number of days to view, click the Day, Week, or Month tab.

When the calendar displays 14 or fewer days, the days are shown side by side with the Time Bar (as shown earlier in Figure 20-6, for example). Figure 20-7 shows the calendar with seven days displayed.

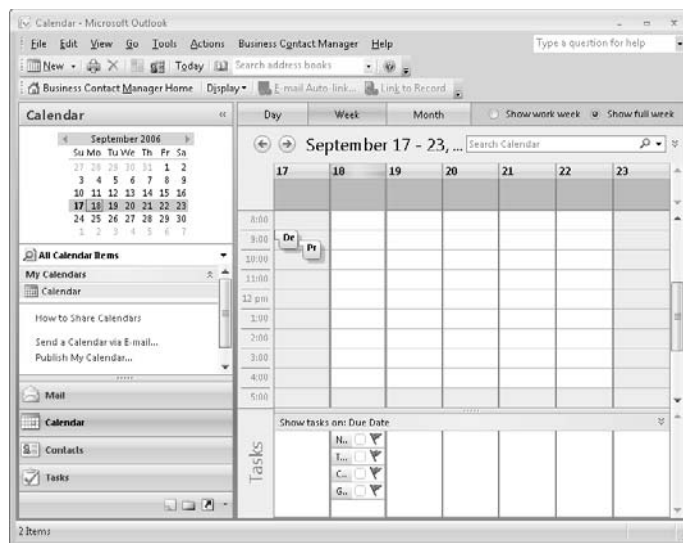


Figure 20-7. The calendar display changes depending on the number of days you are viewing.

When you click the Month tab in Calendar view, the view is different from the view you see when you select more than seven days in the Date Navigator. However, the Date Navigator and the To-Do Bar can optionally appear in Month view, as shown in Figure 20-8. This behavior is different from earlier versions of Microsoft Outlook, which do not include the Date Navigator or To-Do Bar in Month view.

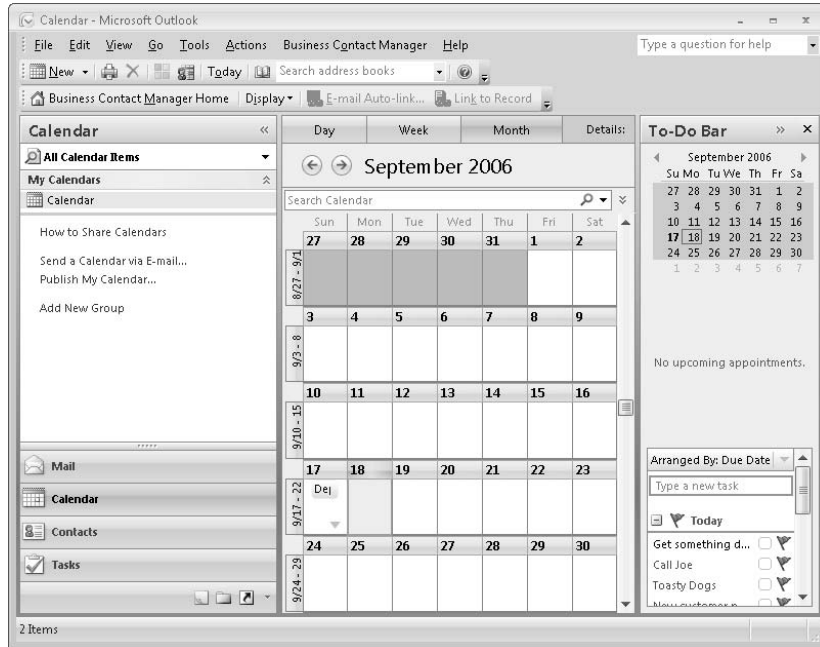


Figure 20-8. Month view can include the Date Navigator and the To-Do Bar.

Selecting a Date

You can select a date in two ways. The first is by using the Date Navigator, as described earlier. The second way is to click the Today button on the toolbar; this action takes you to the current day.

Working with One-Time Appointments

The most basic calendar item is the one-time appointment. You can create a one-time appointment in several ways:

- If the Calendar folder is not open, choose File, New, Appointment or click the arrow next to New on the toolbar and then choose Appointment. The appointment defaults to the next full 30 minutes.
- If the Calendar folder is open, select a time in the calendar and then click New on the toolbar, or alternatively, right-click the calendar and choose New Appointment. The appointment is scheduled for the time selected in the calendar.

- Right-click a date in Month view, and then choose New Appointment. The appointment defaults to your specified start-of-workday time and runs for 30 minutes.

When you take any of these actions, Outlook 2007 opens the appointment form, shown in Figure 20-9, where you can specify information for the new item.

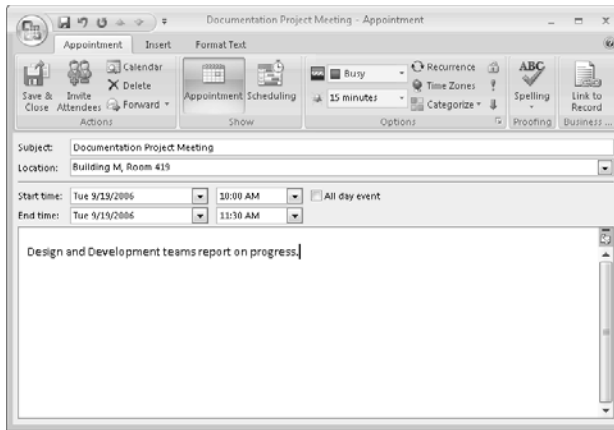


Figure 20-9. Use the appointment form to create a new appointment.

INSIDE OUT

Create an appointment quickly

To quickly create an appointment, you can click a blank time slot on the calendar and type the subject of the appointment. When you use this method, however, Outlook 2007 doesn't automatically open a new appointment form. To add details to the appointment, you must double-click the new appointment to open the form. Note that if you click a blank date in Month view and type a subject, Outlook 2007 creates an all-day event rather than an appointment.

Specifying the Subject and Location

Type the subject of an appointment in the Subject box at the top of the appointment form. Make the subject as descriptive as possible because it will appear on the calendar.

If you want, you can type a location for the appointment in the Location box. To view a list of all previously typed locations, click the Location drop-down arrow; you can select a location in this list. Outlook 2007 will display the location you specify next to the appointment subject in Calendar view (and in parentheses next to the subject in Screen-Tips when you hover the mouse pointer over the scheduled appointment).

Specifying Start and End Times

You set the start and end times of the appointment by typing the date and time in the Start Time and End Time boxes or by clicking the drop-down arrows beside each box. If you click a drop-down arrow for a date, a calendar appears. Click a drop-down arrow for time, and a list of potential start and end times in 30-minute increments appears. The End Time drop-down list shows how long the appointment will be for each given end time. You can also click in these fields and type a value. For example, you might use this method when you want to create a 15-minute appointment when Outlook 2007 is set to use a 30-minute default appointment duration. If you select an appointment time that conflicts with another appointment, a bar above the Subject line will display the message “Conflicts with another appointment on your Calendar.”

Setting a Reminder

You can set a reminder for an appointment by clicking the Reminder arrow in the Options group on the Appointment tab. In the Reminder drop-down list, you can specify when the reminder should appear; the default is 15 minutes before the appointment. By default, a reminder both plays a sound and displays a reminder window, as shown in Figure 20-10. If you don’t want the reminder to play a sound, or if you want to use a different sound, click the Sound option at the bottom of the Reminder drop-down list to change the settings.

Note

To change the default behavior of appointment reminders, choose Tools, Options, and then click Preferences. In the Calendar area of the Preferences tab, you can select (or clear) the default reminder and set the default reminder time.

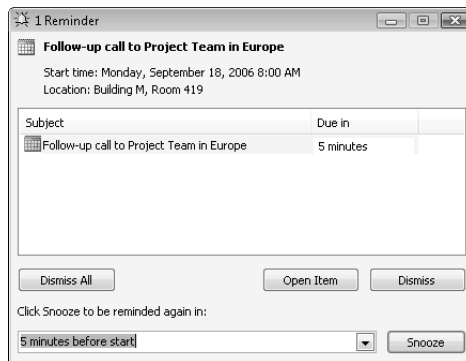


Figure 20-10. You can dismiss a reminder by clicking Dismiss or postpone it by clicking Snooze.

Classifying an Appointment

Outlook 2007 uses color and patterns to indicate free/busy information for appointments. In the calendar itself, Outlook 2007 does not show an indicator next to appointments marked Busy. It uses the following bars at the left edge of the appointment to indicate status:

- Free (white)
- Tentative (shaded with diagonal lines)
- Out Of Office (shaded dark purple)

Note

When you are scheduling a meeting or viewing a group schedule, Outlook 2007 shows busy time using a blue bar.

The indicator (a small bar to the left of the appointment) appears on your local calendar and is also displayed when other users view the free/busy times for that calendar. By default, the time occupied by an appointment is classified as Busy. To reclassify an appointment, select the indicator in the Show As drop-down list in the Options group, as shown in Figure 20-11.

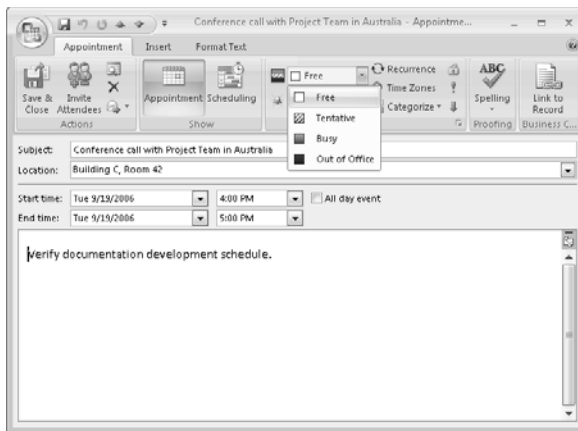


Figure 20-11. Use this drop-down list to select a classification for your appointment, which specifies how the appointment is displayed on your calendar.

Adding a Note

Sometimes an appointment requires more detail. You might need to remind yourself about documents that you need to bring to the appointment, or perhaps you need to write down directions to an unfamiliar location. When that's the case, you can add a note by typing your text in the large text area of the form, as shown in Figure 20-12.

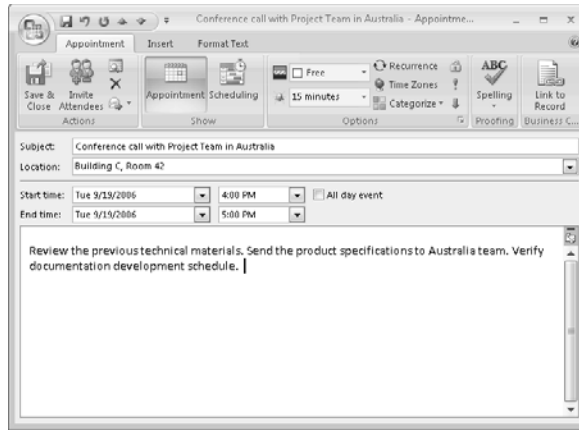


Figure 20-12. You can write a note on the appointment form.

Categorizing an Appointment

Assigning a category to an appointment is simply another method of organizing your information. Outlook 2007 provides a number of default categories associated with colors, and you can customize the names for each category. The color association enables you to more easily identify the categories of appointments within your calendar. You can create additional categories as desired and associate each with a specific color. Outlook 2007 allows you to categorize your appointments so that you can then filter or sort them before viewing. In this way, you can get an overview of all Outlook 2007 items based on a particular category. For example, you could view all appointments, meetings, messages, contacts, and tasks that have been assigned the same category—perhaps all the items related to a specific work project or objective.

For more information about working with categories in Outlook 2007, see Chapter 5, “Creating and Using Categories.”

To assign a category to an appointment, click Categorize in the Options group of the appointment form. To assign a single category to the appointment, simply select the category in the drop-down list, as shown in Figure 20-13. To select multiple categories, modify existing categories, or create new categories, select the All Categories option at the bottom of the drop-down list.

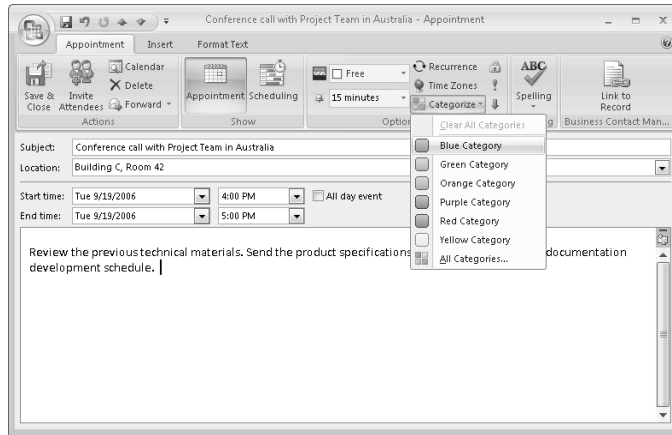


Figure 20-13. You can assign color categories to your appointment.

When you select All Categories, the Color Categories dialog box is displayed, as shown in Figure 20-14, enabling you to manage the categories. In this dialog box, you can select one or more categories and then click OK to assign them to the appointment. You can also rename or delete any of the existing categories and change the color association, as well as assigning a shortcut key for each category.

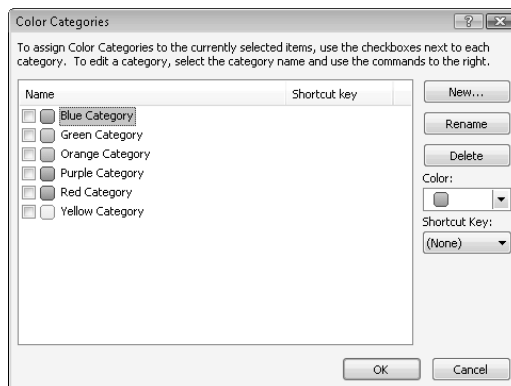


Figure 20-14. You can assign multiple categories to your appointment and configure a category label, color, and shortcut key.

Saving an Appointment

You can save an appointment in several ways. The most basic method is to click the Save & Close button on the Ribbon. This saves the appointment in the Calendar folder and closes the appointment form. If you want to save the appointment but keep the form open, click the Microsoft Office Button, and then click Save.

A more complex way to save appointments allows them to be transferred to other users (who might or might not use Outlook 2007) and opened in other applications. To save your appointments in any of a number of file formats, click the Microsoft Office Button, and then choose Save As to display the Save As dialog box, shown in Figure 20-15.

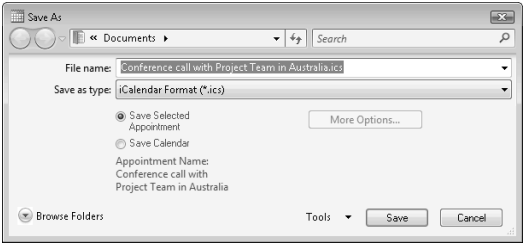


Figure 20-15. You can save your appointment in any of several formats so that the appointment can be opened with another application. You can also save the calendar or any date range portion of it.

The following formats are available:

- **Rich Text Format and Text Only** These formats save the appointment in a file that text editors can read. Figure 20-16 shows an example of an appointment saved in Rich Text Format and then opened in WordPad.

Note

You can create a new appointment from an Outlook 2007 Template file by choosing File, New, Choose Form and then selecting User Templates In File System in the Look In list.

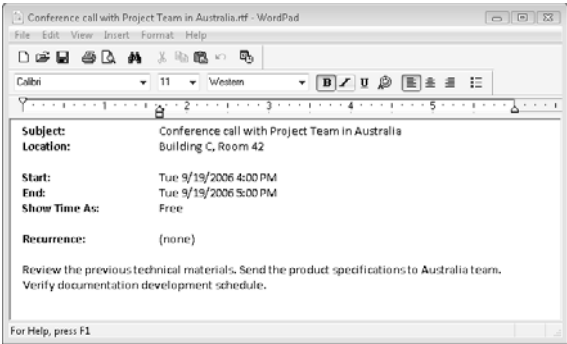


Figure 20-16. An appointment saved in Rich Text Format or Text Only can be displayed in any application that supports those file types.

- **Outlook 2007 Template** This format allows you to save an appointment and use it later to create new appointments.

- **Outlook Message Format** Saving an appointment in this format is almost the same as saving an appointment to the calendar, except that the appointment is saved in a file in case you want to archive the file or move it to another installation of Outlook 2007. You can view the file in Outlook 2007, and the data appears as it would if you had opened the item from the calendar.
- **iCalendar Format and vCalendar Format** These formats are used to share schedule items with people who use applications other than Outlook 2007. iCalendar is a newer version of the standard (maintained by the Internet Mail Consortium) and should be used if possible.

Changing an Appointment to an Event

To change an appointment to an event, select the All Day Event check box on the appointment form. When an appointment is converted to an event, the start and end times are removed and only the start and end dates are left because events by definition last all day. The event appears in the banner area of the calendar.

Working with One-Time Events

An event is an appointment that lasts for one or more entire days. You can create an event by right-clicking the calendar and then choosing New All Day Event. Unlike appointments, events are not shown in time slots on the calendar. Instead, events are displayed as banners at the top of the calendar day. Figure 20-17 shows the calendar with a scheduled event—in this case, a trade show.

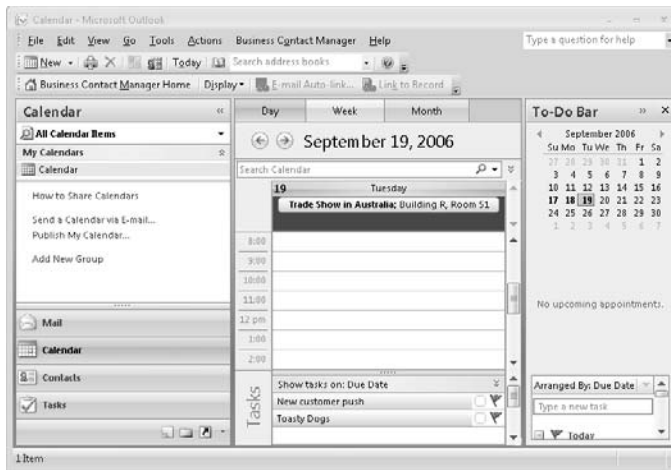


Figure 20-17. Outlook 2007 displays events as banners on the calendar.

INSIDE OUT

Create an event quickly

A simple way to add an event is to click the banner area of the calendar and start typing the subject of the event. When you add an event this way, the event is automatically set to last for only the selected day. Or, in Month view, click a date and then type the subject to create a one-time event on that date. To add details and change the duration of the event, you must use the event form.

Using the Event Form

You can use an Event form in much the same way you use an Appointment form, with a few exceptions:

- You can set the start and end times only as dates, not times. (If you select times, the form changes from an event form to an appointment form, and the All Day Event check box is cleared.)
- The default reminder is set to 18 hours.
- The time is shown by default as Free, as opposed to Busy.

The event form and the appointment form look the same except that the All Day Event check box is selected on the event form. You can open an event form by right-clicking the time in Calendar view and then choosing New All Day Event.

To create an event using the event form, type the subject, specify the start and end dates, add any optional information, and then click Save & Close in the Actions group. Figure 20-18 shows the event form for a trade show event.

Figure 20-18. Use the event form to specify the details of an event to be added to your calendar.

Changing an Event to an Appointment

To change an event to an appointment, clear the All Day Event check box on the event form. The boxes for start and end times reappear, and the event will now be displayed in time slots on the calendar, not in the banner area.

Creating a Recurring Appointment or Event

When you create a recurring appointment or a recurring event, Outlook 2007 automatically displays the recurrences in the calendar. A recurring appointment could be something as simple as a reminder to feed your fish every day or pay your mortgage every month. You can create a recurring calendar item by right-clicking the calendar and then choosing New Recurring Appointment or New Recurring Event. Alternatively, you can open a normal (nonrecurring) item and then click the Recurrence button in the Options group. Either method displays the Appointment Recurrence dialog box, shown in Figure 20-19.

Figure 20-19. You can specify criteria that direct Outlook 2007 to display an appointment or event multiple times in the calendar.

In the Appointment Time area, you set the appointment time and duration. If you're creating the recurrence from an existing nonrecurring appointment, the time of that appointment is listed by default.

The Recurrence Pattern area changes depending on whether you select the Daily, Weekly, Monthly, or Yearly option, as follows:

- **Daily** Specify the number of days or every weekday.
- **Weekly** Specify the number of weeks and the day (or days) of the week.
- **Monthly** Specify the number of months as well as the day of the month (such as the 27th) or the day and week of the month (such as the fourth Wednesday).
- **Yearly** Specify the date (such as December 27th) or the day and week of the month (such as the fourth Wednesday of each December).

At the bottom of the Appointment Recurrence dialog box is the Range Of Recurrence area. By default, the start date is the current day, and the recurrence is set to No End Date. You can choose to have the appointment recur a specified number of times and then stop, or you can set it to recur until a specified date and then stop—either method has the same effect. For example, to set a recurring appointment that starts on the first Monday of a month and continues for four Mondays in that month, you could either set it to occur four times or set it to occur until the last day of the month.

Modifying an Appointment or Event

There are many reasons you might need to change a scheduled appointment or event—an event could be rescheduled, an appointment could be moved to a better time, or the topical focus could be added to or changed. In each case, you will need to modify the existing appointment or event, updating information or changing the date or time.

Changing an Appointment or Event

Modifying an existing appointment or event is easy. First open the appointment or event by locating it in the calendar and then either double-clicking or right-clicking it and choosing Open. Make the necessary changes in the form, and then click Save & Close on the Ribbon. The updated appointment or event is saved in the Calendar folder.

Deleting an Appointment or Event

You can delete an appointment or event in several ways. To send the item to the Deleted Items folder, right-click the item and choose Delete, or select the item and press the **Delete** key. To permanently delete the item, hold down **Shift** while choosing Delete or pressing the **Delete** key.

CAUTION !

You cannot recover an item that has been deleted using the **Shift** key unless you are using Microsoft Exchange Server and your administrator has configured the server for a retention period.

Using Categories and Colors

You can use color as a tool to identify appointments and events. In Outlook 2003, the assignment of colors and categories was separate from that of other categories, but in Outlook 2007 these have been combined. The easiest way to assign color to an

appointment is to use the Categorize drop-down list on the appointment form. You can also create rules that direct Outlook 2007 to assign color labels automatically via the Edit, Automatic Formatting menu option in Outlook 2007.

Assigning Color Categories to an Appointment Manually

The Categorize drop-down list on the appointment form shows the different color labels (associated with categories) that you can assign to an appointment as a visual cue to indicate the topic of the appointment. Categories can also reflect appointment importance or requirements. Simply select a color in the drop-down list when you fill in the appointment form. In Figure 20-20, the appointment shown is a business one, and it will be displayed on the calendar in the specified color. To set colors independently of categories, use the automatic formatting rules described in the next section.

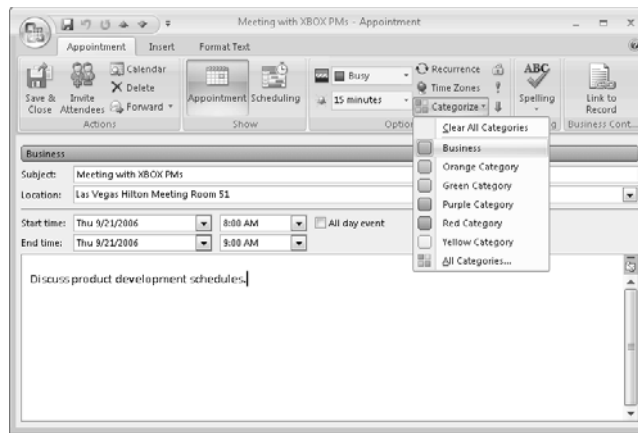


Figure 20-20. You can assign a color category label to your appointment.

You can assign a category to an appointment without associating a color with it, by defining a category and selecting None for the color. Categories without colors will not provide the visual cue that enables you to quickly identify the nature of an appointment, but they still are useful—for example, when you filter your Calendar view by category.

Note

Manual color category settings always override automatic settings, even when the category color setting is set to None.

Assigning Color to an Appointment Automatically

To have Outlook 2007 automatically assign a color label to an appointment, you can create automatic formatting rules.

To create a Color rule, do the following:

1. Choose Edit, Automatic Formatting to display the Automatic Formatting dialog box.
2. Click Add to add a new rule.
3. Type a name and assign a label to the new rule. Figure 20-21 shows a rule to automatically color all Important appointments with the red color.

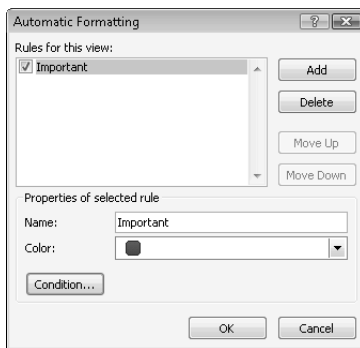


Figure 20-21. This new rule automatically assigns the red color to all Important appointments.

4. Click Condition to open the Filter dialog box, shown in Figure 20-22, where you specify the condition for the rule.

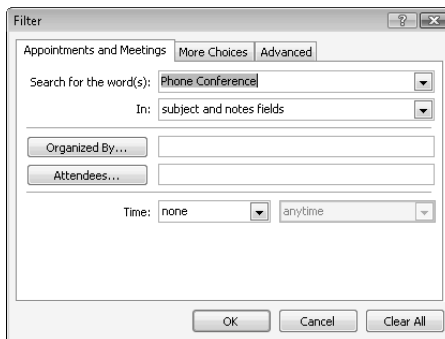


Figure 20-22. The Filter dialog box lets you set a filter that defines the condition on which the automatic color rule works.

For details about using filters, see “Customizing the Current Calendar View” on the opposite page.

5. In this dialog box, assign a condition to the rule. For example, you might use the most basic type of filter and search for a word or phrase in all appointments. In this case, Outlook 2007 will search for the words *Phone Conference* in the Subject and Notes fields and will apply the rule to mark these appointments as Important (red) if *Phone Conference* is found.

Note

The More Choices and Advanced tabs in the Filter dialog box enable you to select other criteria, such as categories, read status, attachments, size, or matching fields.

6. Click OK to assign the condition to the new rule.
7. Click OK twice, once to close the Automatic Formatting dialog box and again to close the Customize View dialog box. A rule is now in effect that all appointments with the phrase *Phone Conference* in their Subject or Notes field will be assigned the red color, designating them as Important.

Printing Calendar Items

You can print calendar items in two ways. The simplest method is to right-click the item and then choose Print on the shortcut menu. This method prints the item using the default settings.

The other way to print an item is to first open it by double-clicking it or by right-clicking it and choosing Open. You can then click the Microsoft Office Button and click Print to display the Print dialog box, or click the arrow next to Print and select Quick Print to print using the default settings.

You can make selections in the Print dialog box to change the target printer, the number of copies, and the print style, if necessary. The print style defines how the printed item will look. Click Page Setup to change the options for the selected style. In the Page Setup dialog box, use the Format tab to set fonts and shading; the Paper tab to change the paper size, orientation, and margin settings; and the Header/Footer tab to add information to be printed at the top and bottom of the page.

Customizing the Current Calendar View

In addition to setting the number of days displayed, configuring the Time Bar, and color-coding your appointments, you can customize the standard view of the Calendar folder in other ways. You can redefine fields, set up filters that define which items are displayed on your calendar, and control fonts and other view settings. To configure

the view, begin by choosing View, Current View, Customize Current View to open the Customize View dialog box, shown in Figure 20-23.



Figure 20-23. Use the Customize View dialog box to change view settings.

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Customize additional views

You can also customize views other than the current one. To do so, choose View, Current View, Define Views. Select the view in the Custom View Organizer dialog box, and then click Modify. This displays the Customize View dialog box, where you can change the options for the selected view.

Redefining Fields

Only two of the fields used for calendar items can be redefined: the Start and End fields. The values in these fields determine an item's precise location on the calendar—that is, where the item is displayed. By default, the value contained in the Start field is the start time of the appointment and the value contained in the End field is the end time of the appointment, which means that the item is displayed on the calendar in the time interval defined by the item's Start and End values.

To redefine either the Start or the End value, click Fields in the Customize View dialog box to open the Date/Time Fields dialog box. In the Available Date/Time Fields list, select the field that you want to use for the Start field, and then click Start. Use the End button to change the End field. For example, if you redefine the Start field to Recurrence Range Start and the End field to Recurrence Range End, all recurring calendar items will be displayed as a single item that starts on the date of the first occurrence and ends on the date of the last occurrence. This can be handy if you want to view the entire recurrence range for a given item graphically.

Filtering Calendar Items

You can filter calendar items based on their content, their assigned category, or other criteria. By filtering the current view, you can determine which calendar items are displayed on your calendar—for example, all items related to one of your work projects, all items that involve a specific coworker, or items with a particular importance level.

To filter calendar items, follow these steps:

1. Choose View, Current View, Customize Current View to open the Customize View dialog box.
2. Click Filter to open the Filter dialog box.
3. If the Appointments And Meetings tab isn't displayed, as shown in Figure 20-24, click it to bring it to the front.

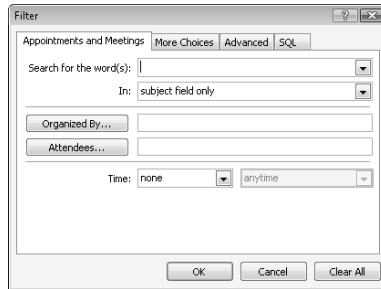


Figure 20-24. You can filter calendar items based on a specified word or phrase.

4. In the Search For The Word(s) box, type the word or phrase you want to use as the filter.
5. In the In drop-down list, select which areas of the calendar item to search—for example, you might have Outlook 2007 look only in the Subject field of your appointments.
6. Click OK. Outlook 2007 displays on your calendar only those calendar items that contain the specified word or phrase.

To set additional criteria, you can use the three other tabs in the Filter dialog box—More Choices, Advanced, and SQL—as follows:

- **More Choices** On this tab, you can click Categories to select any number of categories. After you click OK, only calendar items belonging to the selected categories are displayed on the calendar. Using the check boxes on the More Choices tab, you can filter items based on whether they are read or unread, whether they have attachments, or their importance setting. The final check box on the tab enables or disables case matching for the word or phrase specified on the Appointments And Meetings tab. You can also filter items depending on size.

- **Advanced** This tab allows an even wider range of filter criteria. You can specify any field, adding a condition such as Contains or Is Not Empty or a value for conditions that require one. Clicking Add To List adds the criteria to the list of filters.
- **SQL** This tab has two purposes. In most cases, it displays the SQL code for the filter, based on the filter criteria you select on the other three tabs. If the Edit These Criteria Directly check box is selected, however, you can manually type the SQL code for filtering calendar items directly on the SQL tab. This flexibility allows you to fine-tune your filters with a great degree of precision.

Controlling Fonts and Other View Settings

You can use the Customize View dialog box (shown earlier in Figure 20-23) to make additional changes to the current view. In the Customize View dialog box, click Other Settings to display the Format Day/Week/Month View dialog box, shown in Figure 20-25.

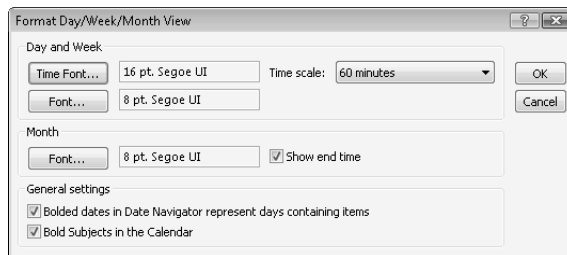


Figure 20-25. You can use the Format Day/Week/Month View dialog box to set font preferences for the Calendar folder as well as other options.

In the Format Day/Week/Month View dialog box, you can do the following:

- Set the fonts used in Calendar view.
- Set the calendar's time increments by selecting an option in the Time Scale drop-down list. This sets the amount of time represented by each interval in the Time Bar.
- Specify whether days with scheduled items should appear in bold in the Date Navigator.
- Specify whether Subjects in the calendar should appear in bold.

Creating a Custom View

Up to now, we have looked only at the customization of existing views, but you can also create completely new views and copy and modify views. If your current view is one you use often but nevertheless must change frequently to filter calendar items or modify fields, you might find it easier to create a new view.

To create a view or to see a list of already defined views, choose View, Current View, Define Views to open the Custom View Organizer dialog box, shown in Figure 20-26.

Note

To work with the Outlook 2007 calendar views, you must open the Calendar folder.

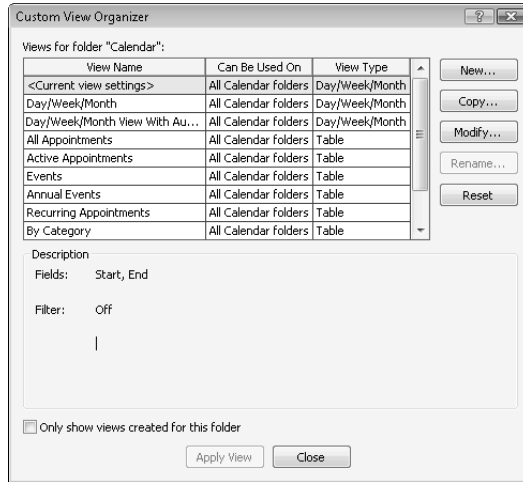


Figure 20-26. The Custom View Organizer dialog box allows you to see and work with the currently defined views as well as create new ones.

Creating a New View

To create a view, follow these steps:

1. Click New in the Custom View Organizer dialog box to open the Create A New View dialog box, shown in Figure 20-27.

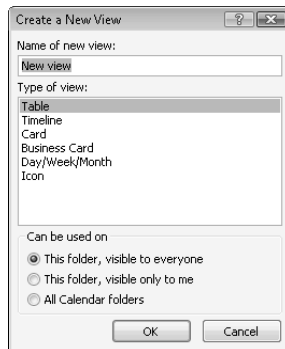


Figure 20-27. You can use the Create A New View dialog box to specify a name, a view type, the folder to which the view applies, and who is allowed to see the view.

2. Name the new view, and then select a view type. In the Can Be Used On area, specify the folder to which the view applies and who is allowed to see the view. You can select one of the following options:

This Folder, Visible To Everyone Limits the view to the current folder and makes it available to any user.

This Folder, Visible Only To Me Limits the view to the current folder but makes it available only to the current user.

All Calendar Folders Allows the view to be used in any Calendar folder by any user.

3. Click OK to create the new view. The Customize View dialog box appears, in which you can set the options for the new view.

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Change the availability of an existing view

The Modify option in the Custom View Organizer dialog box does not let you change the availability of an existing view. To change the availability of an existing view or who is allowed to see a view, first copy the view and assign a name to the copy. (See the next section for more information about copying views.) Then select a new option in the Can Be Used On area. Last, delete the original view and rename the new view using the name of the deleted view.

For information about setting view options in the Customize View dialog box, see "Customizing the Current Calendar View " earlier in this chapter.

Copying a View

If you want to modify an existing view but also want to keep the original, you can make a copy of the view. To copy a view, select it in the Custom View Organizer dialog box, and then click Copy. In the Copy View dialog box, you can specify the name of the new view, the folder to which the view will apply, and who is allowed to see the view. Click OK to create the copy, which is added to the list in the Custom View Organizer dialog box and the list on the View, Current View menu.

Using Overlay Mode to View Multiple Calendars in One

There are times when you need to view and compare multiple schedules to identify related items, such as workflow dependencies within a project, as well as to find and alleviate scheduling conflicts. For example, you might want to view your personal calendar in contrast to your departmental calendar to compare scheduling and task overlaps. Outlook 2007 adds a new capability to view multiple calendars in overlay mode, as shown in Figure 20-28.

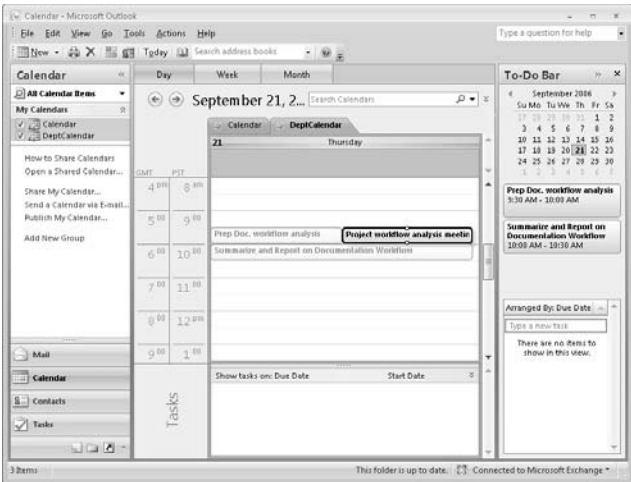


Figure 20-28. You can overlay multiple calendars to view related or conflicting schedules.

To view multiple calendars in overlay mode:

1. Select multiple calendars by selecting the check boxes next to the calendars in the Navigation Pane.
2. Under My Calendars, right-click one of the calendars in the Navigation Pane, and then choose View In Overlay Mode.

Note

You can click the left arrow icon at the left edge of the calendar's name tab to overlay the calendar with the leftmost calendar. Click the right arrow icon to move the selected calendar out of overlay mode.

Backing Up Your Schedule

To back up items in your Calendar folder, you must export the data to a personal folders (.pst) file. To do so, follow these steps:

1. Choose File, Import And Export to start the Import And Export Wizard.
2. Click Export To A File, as shown in Figure 20-29, and then click Next.



Figure 20-29. To back up calendar items, start the Import And Export Wizard, and then select Export To A File.

3. On the Export To A File page, shown in Figure 20-30, select Personal Folder File (.pst), and then click Next.

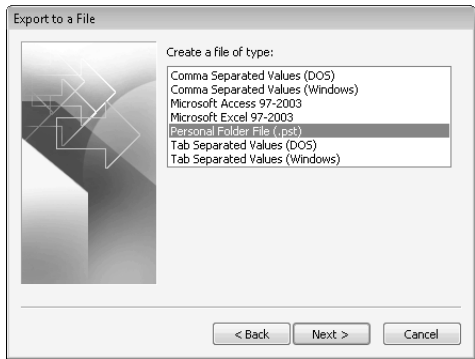


Figure 20-30. Calendar items should be backed up to a .pst file.

4. In the Export Personal Folders dialog box, select the folder to export (the Calendar folder in the example shown in Figure 20-31). If you select the Include Subfolders check box, any subfolders of the selected folder are exported as well.

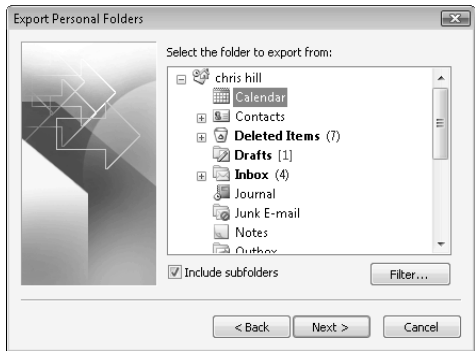


Figure 20-31. You use the Export Personal Folders dialog box to specify the folder to export to a file.

5. Click Filter to open the Filter dialog box, in which you can specify the items to be exported. You can use the Filter dialog box if you want to export only specific items from your Calendar folder. If you choose not to use the Filter dialog box, all items will be exported. Click Next to continue.

For details about using the Filter dialog box, see “Filtering Calendar Items” earlier in this chapter.

6. Specify the exported file and the export options. The export options control how Outlook 2007 handles items that have duplicates in the target file. You can choose to overwrite duplicates, create duplicates in the file, or not export duplicate items.
7. Click Finish. The Create Microsoft Personal Folders dialog box, shown in Figure 20-32, displays the selected file name.

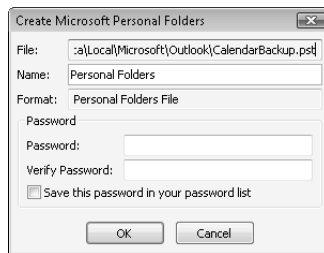


Figure 20-32. Type a password and verify the password before creating the .pst file.

8. Specify a descriptive name for the .pst file. You can also set a password for the file.
9. Click OK to create the file.

To restore data backed up to the .pst file, follow these steps:

1. Choose File, Import And Export to start the Import And Export Wizard.
2. Select Import From Another Program Or File, and then click Next.
3. Select Personal Folder File (.pst), and then click Next.
4. On the Import Personal Folders page, specify the backup file and how Outlook 2007 should handle duplicate items. You can choose to overwrite duplicates, create duplicate items, or not import duplicates. Then click Next. If you assigned a password to the backup file, you will be prompted to enter it at this point.
5. Select the folder within the .pst file to be imported (the Calendar folder in this case), decide whether to include subfolders, and select the target folder. (By default, the target folder is the folder with the same name in the current mailbox, as shown in Figure 20-33.) You can also click Filter to specify in the Filter dialog box which items are to be imported.

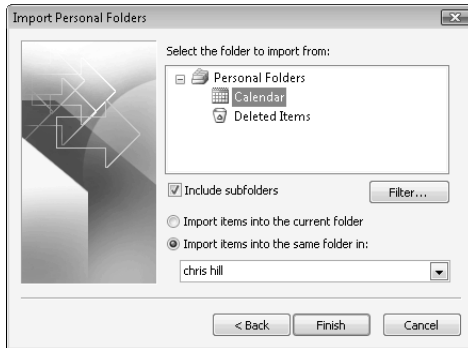


Figure 20-33. When you're importing items, you must select the folder to be imported from the .pst file, whether to include subfolders, and the target folder.

6. Click Finish to complete the import process.

Managing Time Zones

Outlook 2007 gives you a great deal of flexibility when it comes to time zones on your calendar. You can change time zones easily and even add a second time zone to the calendar. If you work for a corporation that has multiple offices in different time zones, being able to quickly reference your calendar with various zones can make scheduling simpler.

Changing the Time Zone

To work with time zones, use the Time Zone dialog box, shown in Figure 20-34. To open this dialog box, right-click the Time Bar and choose Change Time Zone. (Alternatively, choose Tools, Options, click Calendar Options, and then click Time Zone.)



Figure 20-34. You can set the current time zone and display a second time zone.

In the Time Zone dialog box, you can specify a label for the current time zone, which is displayed above the Time Bar on your calendar. You can also set the time zone you want to use by selecting it in the Time Zone drop-down list, and you can specify whether to automatically adjust for daylight saving time.

Note

Changing the time zone in the Time Zone dialog box has the same effect as changing the time zone by using the Date And Time dialog box through Control Panel (Classic View).

When you change the time zone, the time of your appointments adjusts as well. Your appointments stay at their scheduled time in the original time zone but move to the appropriate time in the new time zone. For example, an appointment scheduled for 10:00 A.M. in the GMT+2 time zone will move to 8:00 A.M. if the time zone is changed to GMT (Greenwich Mean Time). Appointments are scheduled in absolute time, regardless of the time zone.

Using Two Time Zones

To add a second time zone to your calendar, follow these steps:

1. In the Time Zone dialog box, select the Show An Additional Time Zone check box.
2. Assign a label to the second time zone. This step is not necessary, but it can help to avoid confusion later on. (If your first time zone does not already have a label, adding one now will allow you to easily distinguish between the two.)
3. In the second Time Zone drop-down list, select the second time zone.
4. Select the Adjust For Daylight Saving Time check box if you want Outlook 2007 to make this adjustment.
5. Click Swap Time Zones to swap the current time zone with the second time zone. This feature is useful if you travel between corporate offices in different time zones.

Figure 20-35 shows the calendar after these changes have been applied.

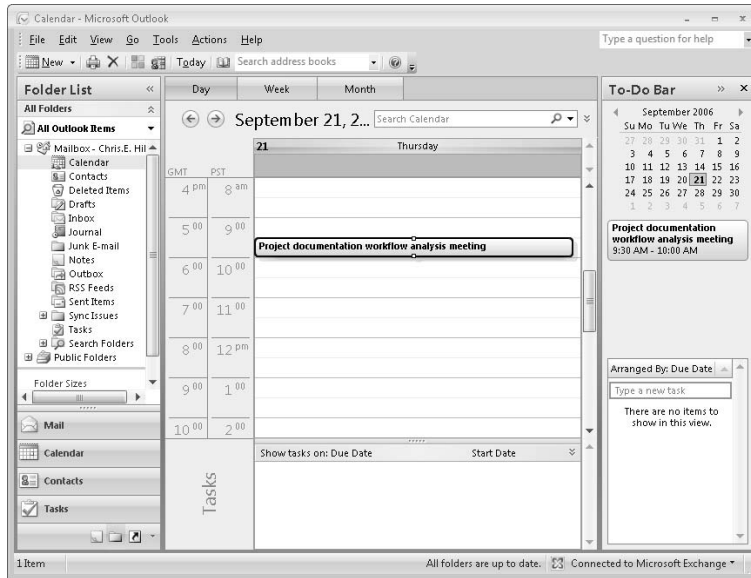


Figure 20-35. The calendar displays both time zones in the Time Bar under their respective labels.

Managing Your Calendar Effectively

Your Outlook 2007 calendar can help you track your appointments and events and facilitate your collaboration with coworkers, vendors, and clients. To maximize the value of the Outlook 2007 calendar, you will want to provide as much detail in the information you enter as you can. In addition to simply marking the dates and times of scheduled appointments and events, the calendar information will serve as a quick reference to key points in your workflow, projects, and goals. In addition, the interface features (such as Categories and Automatic Formatting) can provide valuable visual and cognitive cues to the nature and importance of your calendar information.

- Use color categories for quick identification.** Outlook 2007 has combined color and category labeling of appointments and events and allows you to define the name of each category and the color associated with it. By defining a set of categories that fits the categories of events, appointments, and information you will be storing in your calendar, you can make it easy to mark (and later identify) the nature and significance of items in your calendar at a glance. These user-defined color categories can provide you with visual cues that help you identify calendar items, tasks, and e-mail that are related—such as a departmental project or role-based recurring activities. The color categories in Outlook 2007 are contained in your default data file; thus for users of Microsoft Exchange Server, your color categories are available regardless of which computer you log on from.
- Use automatic formatting to format items based on user-selectable criteria.** In addition to color categories, you can use automatic formatting to assign a color

to appointments, events, and so on in your calendar based on criteria that you define. This can be particularly useful in that you can provide specific words, phrases, or other criteria that Outlook 2007 will use to automatically tag the appointment or event with a specific color. You can use automatic formatting, for example, to find the phrase *Phone Conference* in the Subject or Notes field of appointments and automatically color all those items in your calendar (with a color you select) to provide you with visual cues that the item involves a phone conference.

For specific information about how to assign colors automatically, see the section “Assigning Color to an Appointment Automatically” earlier in this chapter.

- **Delegate calendar update responsibilities.** In managing your calendar, scheduling appointments and events, and communicating your schedule information effectively, you can make use of the abilities to delegate access and degrees of editing and authoring control to team members, assistants, and key people involved in ongoing projects.

Note

To delegate control over your calendar (or other functions of Outlook 2007), you and the person you are delegating to must both be using Microsoft Exchange for your mail servers.

For network environments using Microsoft Exchange, however, the ability to delegate differential levels of control can be a useful way to turn schedule management into a cooperative effort. Even without providing other users with the ability to send e-mail messages as you, you can nevertheless enable them to read your schedule, create new items or subfolders, edit and delete their own additions to your schedule, and even edit all calendar content. When you are working closely with an associate or a team member on a mutual project, that person could add schedule items on your behalf that address his or her area (documentation, code development, marketing) of responsibility.

- **Share your calendar information.** In addition to those environments where you can directly delegate access to read information from and write information to your calendar, in all cases you can post your calendar information to the external or internal Web servers so that management, team, and project members can view your schedule information. In some cases, you might want to publish only the free/busy portion of your schedule information—for example, when publishing your schedule on the Internet. But when publishing your schedule to internal corporate Web servers, you will want to provide access to more detail so that co-workers and managers stay up to date. The Outlook 2007 Publish To Internet options let you specify the date range and level of detail published, determine access (everyone or just those you invite), and select calendar update frequency. You can also share your calendar via e-mail with the selected group of e-mail recipients for whom your calendar is relevant by using the Send Via E-Mail option. This option

also lets you choose the date range and level of detail sent so that you can control how much of your calendar information you are providing.

For detailed information about sharing calendars, see Chapter 36, “Sharing Calendars.”

- **Use views to manage your calendar.** The various views of your calendar provide a built-in way for you to quickly assess your schedule—simply switching between the Day, Week, and Month tabs reminds you of your scheduled activities. Using the built-in views enables you to see your schedule laid out as a timeline (which you can view on a daily, weekly, or monthly basis). Other default views enable you to see all of your scheduled items as a list that you can sort by date, type of appointment or event, subject, category, and a range of other criteria. Using these views can help you quickly find events and appointments of current topical interest and provide reminders of upcoming scheduled obligations. When specific view and filter criteria are particularly useful for you, creating a custom view using these criteria will provide you with an instant ability to see your schedule information in that format.
- **Use Overlays to Compare Calendars.** For everyone in a work environment, the scheduling of appointments and events has interdependencies with coworkers, teams, project groups, and departments. To avoid scheduling conflicts, it can be very helpful to align your schedule with schedules from other people or groups you are working with. Using Outlook 2007 to bring in additional calendars (from coworkers or groups) and review them in overlay mode greatly facilitates the comparing of schedules.