



Microsoft® Office Outlook® 2007 Inside Out

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Scheduling Meetings and Resources

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Before the introduction of workgroup software such as Microsoft® Exchange and Microsoft Office Outlook® 2007, scheduling a meeting could be a difficult task. Now all it takes is a few simple steps to avoid those endless e-mail exchanges trying to find a suitable meeting time for all invitees. Office Outlook 2007 provides you with a single place to schedule both people and resources for meetings. You can take advantage of these features whether or not you use Exchange Server.

Chapter 20, “Scheduling Appointments,” tells you all about scheduling appointments. Meetings and appointments are similar, of course: both types of items appear on your calendar, and you can create, view, and store them in your Outlook 2007 Calendar folder. An appointment, however, involves only your schedule and time, whereas a meeting involves inviting others and coordinating their schedules. Another difference is that a meeting often requires you to schedule resources, such as a conference room or an overhead projector.

You can schedule meetings with other Outlook 2007 users as well as those who use any e-mail or collaboration application that supports the vCalendar or iCalendar standard. (For more information, see “iCalendar, vCalendar, and vCard” in Chapter 2.) This chapter takes you through the process of scheduling meetings and lining up resources.

Sending a Meeting Request

To schedule a meeting, you begin by selecting your calendar in Outlook 2007 and sending a meeting request. Choose File, New, Meeting Request or click the arrow next to New on the toolbar and choose Meeting Request. The meeting form opens, as shown in Figure 21-1.

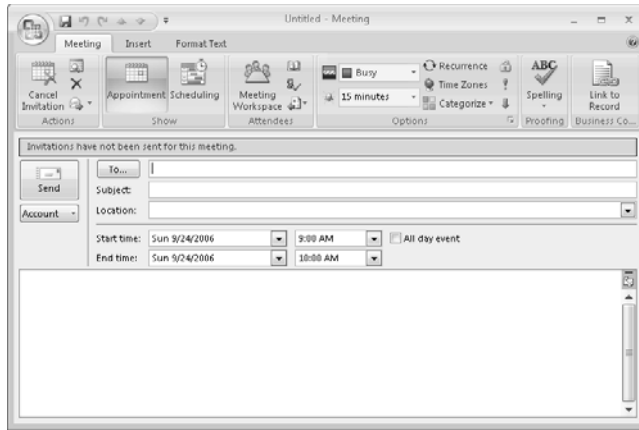


Figure 21-1. You use the meeting form to schedule meetings and send meeting requests.

A meeting request is like an appointment item but with a few additional details—and you can work with it in much the same way you work with an appointment. This chapter describes only the parts of a meeting request that differ from an appointment.

For details about creating and working with appointments in the Outlook 2007 Calendar folder, see Chapter 20, “Scheduling Appointments.”

Selecting Attendees

To invite people to your meeting, start by selecting their names on either the Appointment page or the Scheduling page of the Meeting tab. To select them on the Appointment page, you can type each name in the To box, separating the names with a semicolon. When you enter the names manually, Outlook 2007 considers each person a required attendee. Alternatively, you can click To to open the Select Attendees And Resources dialog box, shown in Figure 21-2. In this dialog box, select a name in the Name list, and then click Required or Optional to designate whether that person’s attendance is critical. (This choice will be reflected in the meeting request you send to these individuals.) After you have finished adding names, click OK to close the dialog box.

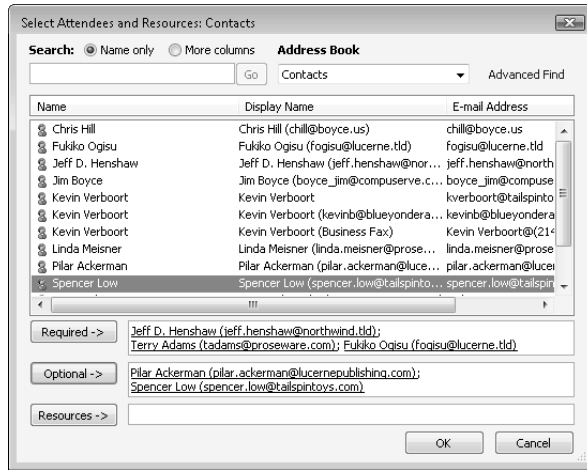


Figure 21-2. In the Select Attendees And Resources dialog box, you can add the names of the individuals you're inviting to your meeting.

Clicking Scheduling on the Meeting tab displays the Scheduling page, shown in Figure 21-3. You can click in the designated box in the All Attendees column and type a name or an e-mail address. Alternatively, you can click Add Others and select the location from which you want to add the names. For example, if you want to add individuals from the Global Address List (GAL), click Add Others, and then select Add From Address Book to open the Select Attendees And Resources dialog box. As before, select a name, click Required or Optional, and then click OK.

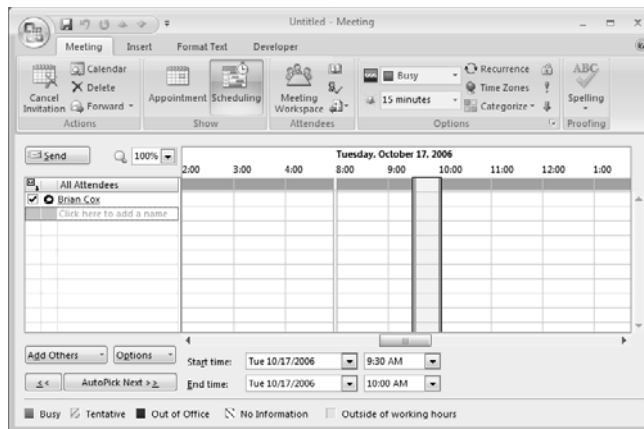


Figure 21-3. You can use the Scheduling page to add meeting attendees and view their schedules.

INSIDE OUT

Select the correct address list

Can't find the attendee you're looking for, and you know that attendee is in the address book? Make sure that the correct address list is selected in the Address Book drop-down list. By default, the GAL, which shows all names from your Exchange Server organization, is selected (if you're running Outlook 2007 with Exchange Server). It is possible to change the default address list, however, and yours could be set to something else.

Scheduling a Meeting

After you have added the names of the individuals you want to invite, the Scheduling page on the meeting form displays free/busy information for all the people you selected. In Figure 21-4, the Scheduling page shows information for the meeting organizer (you), required attendees, and optional attendees.

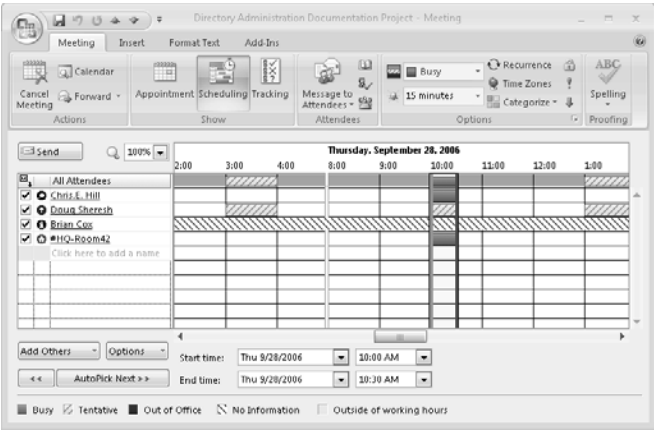


Figure 21-4. The Scheduling page shows the attendees you selected along with their free/busy times.

The icons you see beside each name have the following meanings:

Icon	Description
	The magnifying glass icon indicates the meeting organizer.
	The arrow icon indicates a required attendee.
	The icon containing the letter <i>i</i> indicates an optional attendee.
	The building icon indicates a scheduled resource.

INSIDE OUT

Specify free/busy server location

Outlook 2007 queries the free/busy time of each attendee based on the settings you have configured for that purpose. As you'll see in Chapter 36, "Sharing Calendars," you can configure Outlook 2007 to check Microsoft Office Online, another globally specified free/busy server, and individual servers specified with each contact. These all work in conjunction with Exchange Server, if it is present.

After you have identified a time slot that fits everyone's schedules, you can schedule the meeting for a particular time slot using the Meeting Start Time and Meeting End Time drop-down lists.

If you want Outlook 2007 to fit the meeting into the next available time slot, click AutoPick Next. By default, AutoPick selects the next time slot in which all attendees and at least one resource are free.

INSIDE OUT

Configure the AutoPick feature

To change the default actions of AutoPick, click Options on the Scheduling page, and then make your choices on the AutoPick menu. You can set AutoPick to select the next time slot in which all attendees and all resources are free, the next time slot in which all attendees and at least one resource are free (the default), a time slot in which only required attendees are free, or a time slot in which required attendees and at least one resource are free.

You can specify whether the Scheduling page's display of free/busy information should show only working hours (the default) or the entire day. To define working hours for your calendar, choose Tools, Options, and then click Calendar Options. To set displayed hours for a meeting, click the Options button on the Scheduling page and set or clear the Show Only My Working Hours option. Working hours are a way of displaying your time in the Calendar folder and controlling which hours are displayed on the Scheduling page. In most cases, including nonworking hours on the Scheduling page would become unmanageable.

After you have selected all the attendees, found an available time slot, and filled in all the necessary details on the message form, click Send on the form to send the meeting request to the attendees.

Scheduling a Meeting from the Contacts Folder

If it's more convenient, you can initiate meeting requests from the Contacts folder instead of the Calendar folder. Right-click the contact entry for the person you want to invite to a meeting, and then choose **Create, New Meeting Request To Contact**. The meeting form opens, with the contact's name in the **To** box. From here, you can select more attendees and enter meeting details such as subject and location.

If the contact entry contains an address for an Internet free/busy server (on the **Details** tab of the contact entry, in the **Address** box of the **Internet Free/Busy** area), you can download the contact's free/busy information by clicking **Options** on the **Scheduling** page and then selecting **Refresh Free/Busy Information**. You can also download the contact's free/busy information from Microsoft Office Online, if the contact uses that service, or from another free/busy server if one is specified in the **Free/Busy Options** dialog box. (This will be explained in detail in Chapter 36, "Sharing Calendars.")

For details about Microsoft Office Online, see "Managing Your Free/Busy Information" in Chapter 36.

Changing a Meeting

To change any part of a meeting request, including attendees, times, or other information, first double-click the meeting item in the Calendar folder to open it, and then make your changes. Click the **Save** icon on the **Quick Access Toolbar** to save the changes to the Calendar folder, or click **Send Update** to send an updated meeting request to the attendees. If you make changes that affect the other attendees, such as adding or removing attendees or changing the time or location, you should click **Send Update** so that the attendees get the new information.

Sending a Meeting Request with Scheduling Assistant

When you are using Outlook 2007 with Microsoft Exchange Server 2007, you have an enhanced tool for scheduling meetings called **Scheduling Assistant**. In many ways, scheduling a meeting with **Scheduling Assistant** is similar to how you schedule meetings using Microsoft Exchange Server 2003—to schedule a meeting, you begin by sending a meeting request. Choose **File, New, Meeting Request**, or click the arrow next to **New** on the toolbar and choose **Meeting Request**. The meeting form opens, as shown in Figure 21-5.

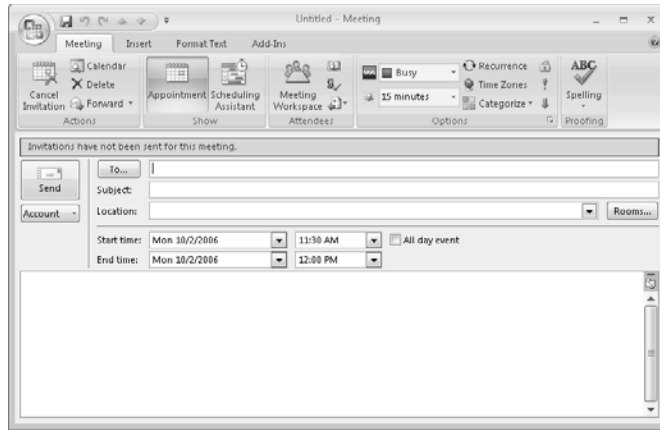


Figure 21-5. The meeting form with Scheduling Assistant includes an option to select rooms.

When you request a meeting using Scheduling Assistant, in addition to the standard meeting or appointment forms, you can select one or more rooms to reserve for the meeting by clicking the Rooms button to the right of the Location box (as shown in Figure 21-5). When you click the Rooms button, the Select Rooms dialog box is displayed, as shown in Figure 21-6. To select a room, click the room (or hold down the **Ctrl** key and click to select multiple rooms), click the Rooms button at the bottom of the dialog box to add the rooms to your meeting request, and then click OK.

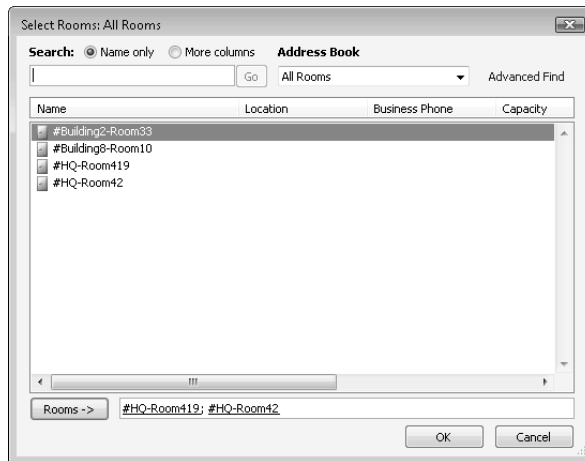


Figure 21-6. The Select Rooms dialog box lets you add one or more rooms to the meeting request.

For details about creating and working with meetings using Microsoft Exchange Server 2000/2003, see “Scheduling a Meeting” earlier in this chapter.

Selecting Attendees

In the same way you invite people to your meeting using the Scheduling option, when using Scheduling Assistant, you start by selecting names on either the Appointment page or the Scheduling Assistant page on the Meeting tab. Using the Appointment option, you can type each name in the To box (separating the names with a semicolon); each name entered manually is a required attendee. Alternatively, you can click the To button to open the Select Attendees And Resources dialog box (shown in Figure 21-7 for Outlook 2007 with Exchange 2007 and in Figure 21-2 for earlier versions), select a name, click Required or Optional to designate that person's attendance status, and then click OK.

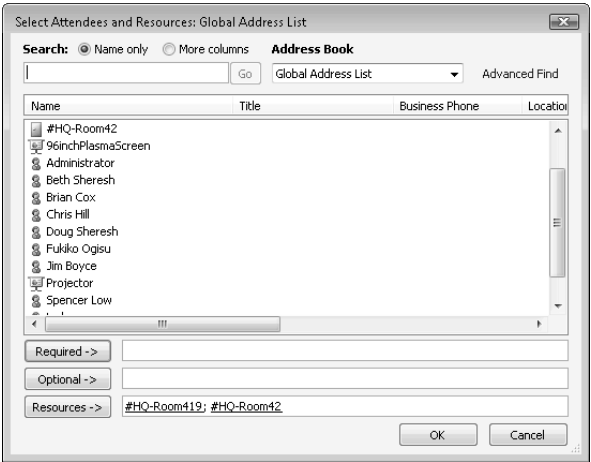


Figure 21-7. The Select Attendees And Resources dialog box lets you request one or more people to attend the meeting.

To add names using Scheduling Assistant, shown in Figure 21-8, you can click in the designated box in the All Attendees column and then type a name or an e-mail address. Alternatively, you can click Add Attendees to open the Select Attendees And Resources dialog box. As before, select a name, click Required or Optional, and then click OK. Similarly, you can click the Add Rooms button to open the Select Rooms dialog box, select one or more rooms, click Add Rooms, and then click OK.

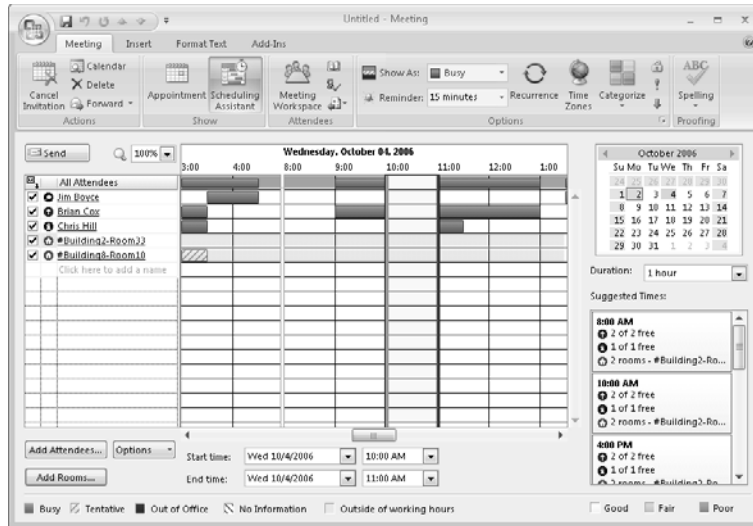


Figure 21-8. Scheduling Assistant.

Scheduling a Meeting Using Scheduling Assistant

Scheduling Assistant not only displays free/busy information for all the people you selected but also shows suggested times when people and resources are available. Scheduling Assistant lets you modify the duration of the meeting (shown in Figure 21-8) and then shows the suggested times when people can meet and the rooms (or other resources) are available. Instead of having to find a time slot that fits everyone's schedules, you can click one of the suggested times to schedule the meeting and then select the specific room that you want for the meeting, as shown in Figure 21-9.

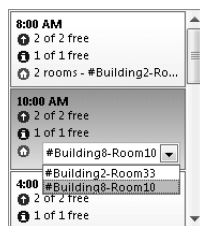


Figure 21-9. You can use Scheduling Assistant to pick a meeting time and select a room for the meeting.

You can specify whether the display of free/busy information on the Scheduling page should show only working hours (the default) or the entire day. To define working hours for the calendar, choose Tools, Options, and then click Calendar Options. To set the display of working hours for a particular meeting, click the Options button on the

Scheduling page, and set or clear the Show Only My Working Hours option. Working hours are a way of displaying your time in the Calendar folder and controlling which hours are displayed on the Scheduling page. In most cases, including nonworking hours on the Scheduling page would become unmanageable.

After you have selected all the attendees, found an available time slot, and filled in all the necessary details on the message form, click Send on the form to send the meeting request to the attendees.

Responding to a Meeting Request

When you click Send on a meeting form, a meeting request e-mail message is sent to the invited attendees. This message allows the attendees to accept, tentatively accept, or reject the meeting invitation; propose a new time for the meeting; and include a message in the reply.

Receiving a Request for a Meeting

The attendees you've invited to your meeting will receive a meeting request message similar to the one shown in Figure 21-10. When an attendee clicks Calendar, a copy of his or her calendar opens, showing the meeting tentatively scheduled.

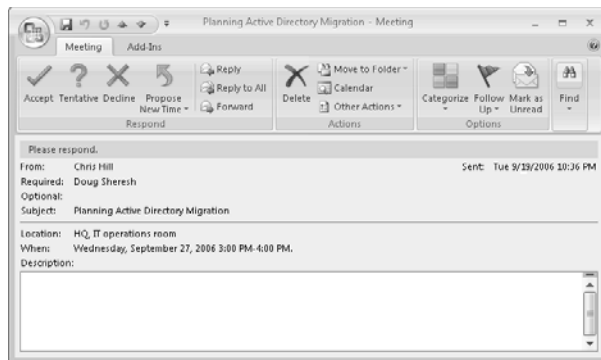


Figure 21-10. A meeting request received by an invited attendee.

An invited attendee has four options when replying to a meeting request:

- Accept the meeting outright.
- Tentatively accept the meeting.
- Decline the meeting.
- Propose a new time for the meeting.

When an attendee chooses to accept, tentatively accept, or decline a meeting request, he or she is presented with three options: send the response immediately (which sends the

default response), edit the response before sending (which allows the attendee to send a message with the response), or send no response.

To propose a new meeting time, the attendee can click Propose New Time. The Propose New Time dialog box that appears is essentially the same as the Scheduling page of the meeting form. From here, the attendee can select a new time for the meeting and propose it to the meeting organizer by clicking Propose Time.

TROUBLESHOOTING

You've lost a meeting request

When you respond to a meeting request in e-mail, the original request message is automatically deleted from your Inbox. Outlook 2007 automatically adds the meeting information to your Calendar folder when you receive the e-mail message. If you respond to the meeting request from your calendar, however, the e-mail message is not deleted from your Inbox.

If you need to retrieve any of the data in the e-mail message, check your Deleted Items folder for the meeting request itself and your Calendar folder for the meeting information.

To have Outlook 2007 keep meeting request messages in your Inbox even after you've responded, follow these steps:

1. Choose Tools, Options, and then click E-Mail Options.
2. Click Advanced E-Mail Options.
3. Clear the Delete Meeting Request From Inbox When Responding check box.

Receiving a Response to Your Request

When an invited attendee responds to a meeting request, a message is returned to you, the meeting organizer. This message contains the response, including any message the attendee chose to include. In the meeting request response shown in Figure 21-11, the attendee has accepted the meeting and included a message. Notice that the response also lists the attendees who have accepted, tentatively accepted, and declined up to this point.

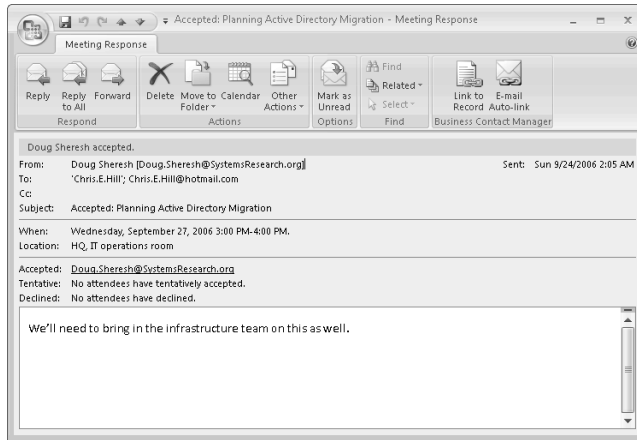


Figure 21-11. A response to a meeting request shows the acceptance status of the request and any message from the attendee.

Figure 21-12 shows a response in which the attendee has selected the Propose A New Time option on a meeting request.

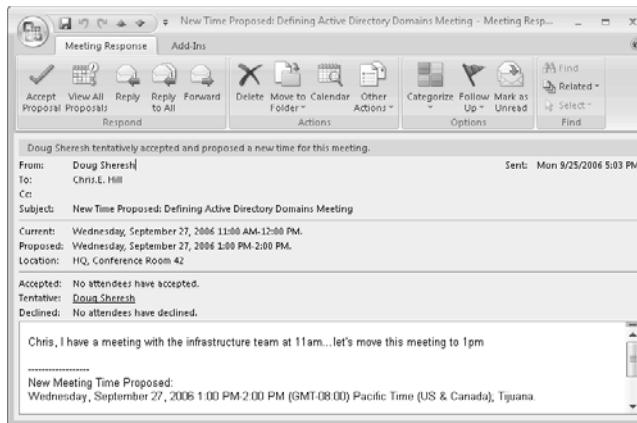


Figure 21-12. When an invited attendee proposes a new time for the meeting, the response to the meeting organizer looks like this.

When you receive a response proposing a new meeting time, you have two choices:

- Click **Accept Proposal** to accept the new time and open the meeting form. Verify any changes, and then click **Send Update** to send the new proposed time to the attendees.
- Click **View All Proposals** to open the Scheduling page of the meeting form, which displays a list of all proposed new times for the meeting suggested by any of the attendees, as shown in Figure 21-13. You can select a new time from the list of proposed times and then click **Send** to send the new time to the meeting attendees.

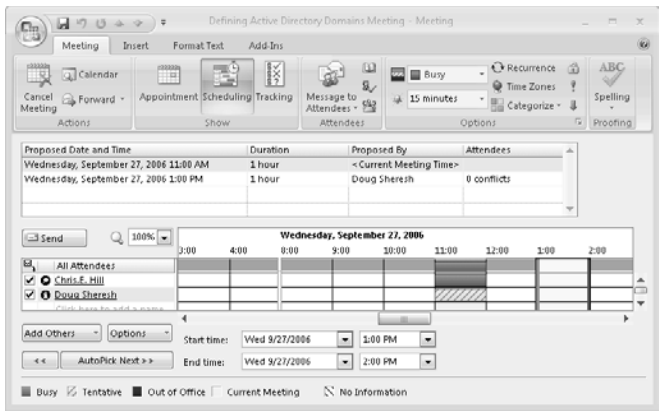


Figure 21-13. You can view the meeting times proposed by all attendees.

Checking Attendees

After you send a meeting request, you can check which attendees have accepted or declined by opening the meeting form in the Calendar folder and clicking the form's Tracking button in the Show group on the Meeting tab, as shown in Figure 21-14. (The Tracking button is not displayed on the initial meeting form; Outlook 2007 adds it after the meeting request has been sent.) The Tracking button shows each invited attendee and indicates whether their attendance is required or optional and the status of their response. The meeting organizer is the only person who can view the status of attendees.

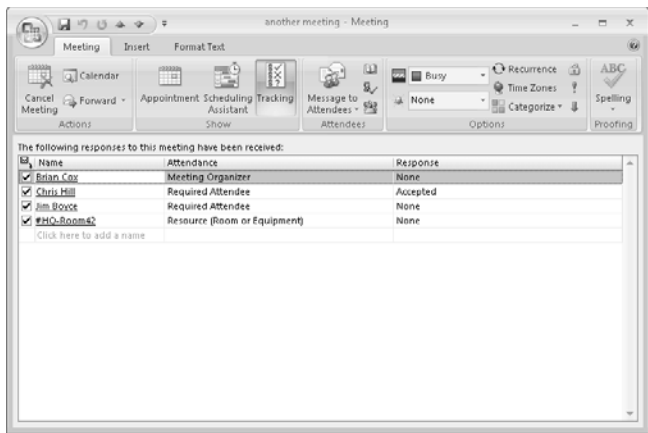


Figure 21-14. Only the person who scheduled the meeting can view the status of the attendees.

Scheduling Resources

To successfully plan and carry out a meeting, you'll usually need to schedule resources as well as people. *Resources* are items (such as computers and projectors) or locations (such as a meeting room) that are required for a meeting. You select resources in much the same way you select attendees.

The ability to schedule resources is typically most useful when you need to set up a meeting, but you might find other occasions when this capability comes in handy. For example, you might want to schedule laptop computers for employees to take home for the weekend or schedule digital cameras to take to building sites.

Setting Up Resources for Scheduling

You schedule a resource by sending a meeting request, adding the resource as a third type of attendee. (The other two types of attendees are Required and Optional, as previously mentioned; see “Selecting Attendees” earlier in this chapter.) Because a resource is scheduled as a type of attendee, it must have a mailbox and a method of accepting or rejecting meeting requests. When you use Outlook 2007 and Exchange Server 2003, a resource is almost identical to any other Exchange Server user except that it is configured to allow another user (the resource administrator) full access to its mailbox. In Exchange Server 2007, unlike user mailbox accounts, all resource mailbox accounts are automatically disabled (yet are still accessible as resources from within Outlook 2007).

The first step in setting up a resource for scheduling is to create (or have your system administrator create) a mailbox and an account for the resource. In many cases, resource account names are preceded by a symbol, such as # or &, so that the names, when alphabetized, appear as a group at the top or bottom of the GAL.

How resources are assigned on the mail server running Microsoft Exchange Server is dependent on which version of Exchange Server you are using. When you set up resource accounts on a server running Exchange Server 2003, you have to go into Active Directory Users And Computers (within the domain in which the server running Exchange is operating) and create and configure user accounts and the subsequent mailboxes. You then have to modify the Mailbox Rights and assign Full Mailbox Access to the resource administrator. The resource administrator has to create a new profile and use the profile to access the mailbox and configure (using the Scheduling Resources option) the Automatically Accept Meeting Requests And Process Cancellations option, which allows the resource scheduling to work. To avoid schedule conflicts, it's also necessary to select Automatically Decline Conflicting Meeting Requests.

When you are using Exchange 2007, you can use new features to schedule both room and equipment resources. In Exchange 2007, instead of using the Active Directory Users And Computers console to add users and their mail accounts, you use the Exchange Management Console. To add a user account and mailbox to Exchange 2007, you browse to the Recipients Configuration container and then select the New Mailbox link. The New Mailbox dialog box provides four options for mailbox creation:

- **User Mailbox** The User mailbox is associated with a user account, enabling the user to send, receive, and store e-mail messages, calendar items, tasks, and other Outlook 2007 items.

- **Room Mailbox** The Room mailbox is reserved as a resource-type mailbox, and the associated account in the Active Directory® directory service is disabled.
- **Equipment Mailbox** The Equipment mailbox is also reserved as a resource-type mailbox, and the associated account in Active Directory is disabled.
- **Linked Mailbox** The Linked mailbox is employed for users that will access the mailbox from a separate trusted forest.

To assign resources for use in Outlook 2007, you add a new mailbox, select the resource type (either Room or Equipment), and then complete the required information (which is essentially the same information you would provide for any user account—name, logon name, password, and alias). After you have created a Room mailbox, for instance, when you click the Rooms button in an Outlook 2007 meeting form, all of the rooms associated with Room mailboxes will be displayed. Equipment resources (as well as rooms) are displayed in the Select Attendees And Resources list and can be included in the meeting request by selecting the desired equipment and clicking the Resources button.

Using the Configured Resources

To schedule a resource after you have configured it, create a meeting request and fill in the details. When you add attendees to the meeting request using the Select Attendees And Resources dialog box, select the resource you want to add from the list, and then click Resources, as shown in Figure 21-15. Resources are added to the Resources box instead of to the Required or Optional box. When you have finished adding resources, click OK. Then complete and send the meeting request as you normally would.

For details about creating and sending meeting requests, see “Sending a Meeting Request” earlier in this chapter.

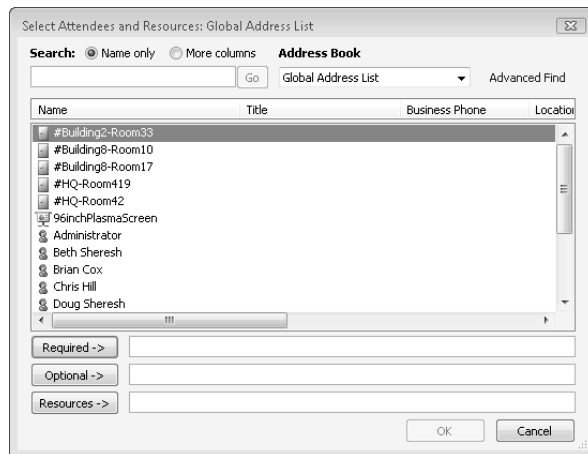


Figure 21-15. Add a resource by selecting it from the list and clicking Resources.

After you send the meeting request, Outlook 2007 (when used in an Exchange Server 2003 environment) responds with a message about the resource's availability. If the resource is available during the time slot proposed for the meeting, Outlook 2007 notifies you that the resource has been booked successfully, as shown in Figure 21-16.

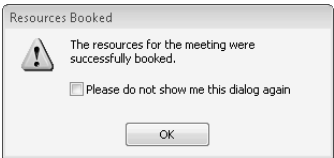


Figure 21-16. Outlook 2007 notifies you if the resource was successfully booked.

Figure 21-17 shows the message that appears when you try to book a resource in a time that overlaps with an existing meeting in that resource's calendar (when in an Exchange Server 2003 environment). Click OK to return to the meeting form, where you must reschedule the meeting or choose a different resource.

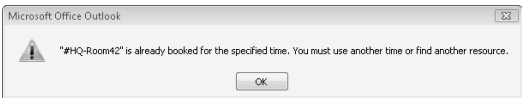


Figure 21-17. When resources are already booked, you must change the meeting time or choose another resource.

Figure 21-18 shows the calendar for the resource being scheduled in the preceding examples. The meeting shown has been scheduled automatically.

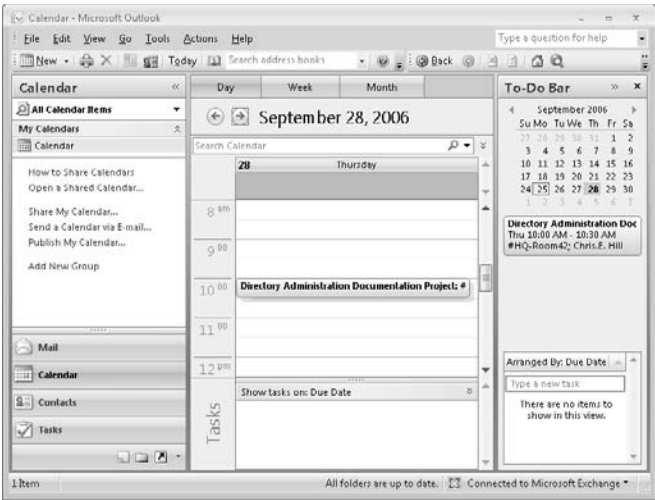


Figure 21-18. The meeting shown on the resource's calendar was booked automatically.

Managing Meetings Effectively

Meetings are an essential part of working in a corporate business environment. While necessary, they are not necessarily always the most effective use of your time. Using the scheduling tools in Outlook 2007 can help you expedite the scheduling of meetings, remind you in advance of upcoming meetings, and help you complete your meetings on time. Using the Outlook 2007 meeting scheduling capability can help improve the quality of your meetings as well. By planning the meeting and notifying all participants of the agenda (in the content of the meeting request), you give them (and yourself) time to prepare notes, documents, and other presentation materials ahead of time. This also allows participants an opportunity to present questions, concerns, and additions to the agenda prior to the meeting, thus ensuring a more comprehensive meeting that isn't distracted by unforeseen complications. You should also keep in mind the specific characteristics of the people invited to each meeting, anticipate aspects (people who show up late, are too verbose, or are easily distracted) that can impair meeting efficiency, and plan your meeting strategy to avoid such issues.

Find the Best Time for the Meeting

When you schedule a meeting in your Outlook 2007 calendar, you can use Outlook 2007 to review the free/busy time on the schedules of the other people you invite to the meeting, thus enabling you to pick times that are available for all attendees when you initially schedule the meeting. To view free/busy information when scheduling a meeting (adding a new meeting request), click Scheduling in the Show group on the Meeting tab. After you have added all attendees, their free/busy information will be retrieved and displayed in a timeline, showing the status of the schedules for each period in the timeline. In addition, resources (such as reserved rooms) will be displayed, showing you which times are available to use the resources. You can refresh the free/busy information by clicking Options and then selecting Refresh Free/Busy. You can also use AutoPick to select a meeting time. Outlook 2007 will select the next available meeting time based on your AutoPick criteria—such as All People, One Resource to pick the first time when all of the attendees are free and one resource (such as a conference room) is available. The AutoPick criteria can be set on the Options, AutoPick menu, which lets you specify whether to require all or some attendees and whether one or more resources have to be available.

Use Scheduling Assistant to Help Schedule Meetings

If you have Outlook 2007 set up as a client to Exchange Server 2007, the scheduling functionality is expanded—the Location box on the Appointment page on the Meeting tab has a Rooms button that facilitates meeting room selection, and the Scheduling Assistant page on the Meeting tab (if you're working in an Exchange Server 2007 environment, the page is labeled Scheduling Assistant) provides further capability to review free/busy information and find available meeting times. In addition to the Free/Busy grid displaying the available times for a meeting (see Figure 21-8), the Suggested Times pane (on the right) shows the Date Navigator, with color-coded dates for possible meeting days (the darker the color, the lower the possibility of scheduling a meeting with

the selected attendees). Below the Date Navigator is the selected Duration setting for the meeting, followed by a list of suggested times and showing how many of the requested attendees are free to attend.

Using these features, you can reliably schedule meetings where all people and resources are available, and without a flurry of back-and-forth e-mail to determine availability for a particular date and time.

Set a Sufficient Reminder to Enable You to Make Meetings on Time

Using the Outlook 2007 reminders can facilitate your getting to your meetings on time. You can assess your own work pattern and determine the best default time for Outlook 2007 to remind you of upcoming meetings. Choose Tools, Options to open the Options dialog box, where you can set the default reminder time in the Calendar area to alert you at the best time prior to the meeting. You can also set reminders for specific meetings to provide an additional reminder (perhaps closer to the start of the meeting) by selecting the reminder time in the Options group on the Appointment page for each meeting.

Schedule Meeting End Times with a Reminder to Help Meetings Stay on Schedule

You can use the Outlook 2007 reminders to help you keep meetings running on schedule. To have Outlook 2007 send you notification of the impending end of the allotted meeting time, schedule an appointment to occur at the end time of the meeting, and then in the appointment, set the reminder to occur 5 to 10 minutes before the meeting end. Having such end-of-meeting reminders can give you the time to effectively wrap up the meeting, reminding people of tasks assigned during the meeting and summarizing critical details.