



Microsoft Outlook 2013 Calendar Scheduling Assistant

More information can be found at:
www.ncstatecollege.edu/help

Scheduling Assistant

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

- [Scheduling Assistant Considerations](#)
- [Microsoft Outlook 2013](#)
- [Webmail](#)

Scheduling Assistant Considerations

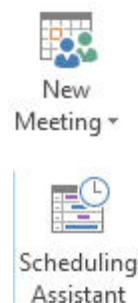
The *Scheduling Assistant* is a powerful tool, but like many other tools, the value is determined by how people use it. For this reason NC State College is requesting the use of Outlook Calendar to be your primary tool to schedule internal College meetings.

Microsoft Outlook 2013

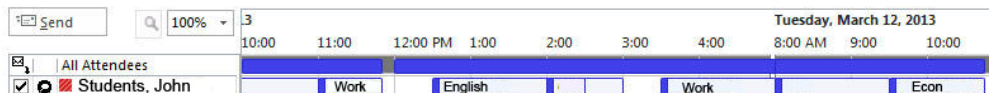
Outlook 2013's *Scheduling Assistant* is capable of taking a great number of variables into account when helping you to schedule a meeting. This section will explain how to create a new *Meeting Request* and schedule that request using the *Scheduling Assistant*.

Creating a New Meeting Request

1. In Outlook, at the bottom left of the screen, click **Calendar**.
2. From the *Home* tab, at the top left of the screen, click **New Meeting**.
3. A new window appears. From the *Meeting* tab, select **Scheduling Assistant**.



In the *Scheduling Assistant* view you will see your name and schedule in the top row.



Note: On the right-hand side, you will see the *Suggested Times* list. As you add attendees to your meeting, this list will adjust to provide possible meeting times when all required attendees and/or locations are available. The times correspond to the date and meeting duration you have currently selected (more information on this can be found below).

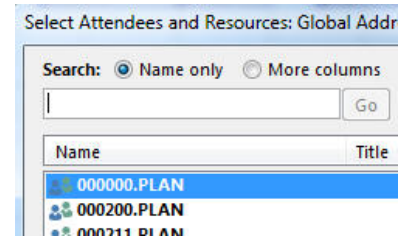
4. There are multiple ways to add attendees to your meeting requests:

5. If you know the name of the person (or people) you wish to add, click in the space under your name that says **Click here to add a name**, and type in the person's name or username.

Example: John Smith

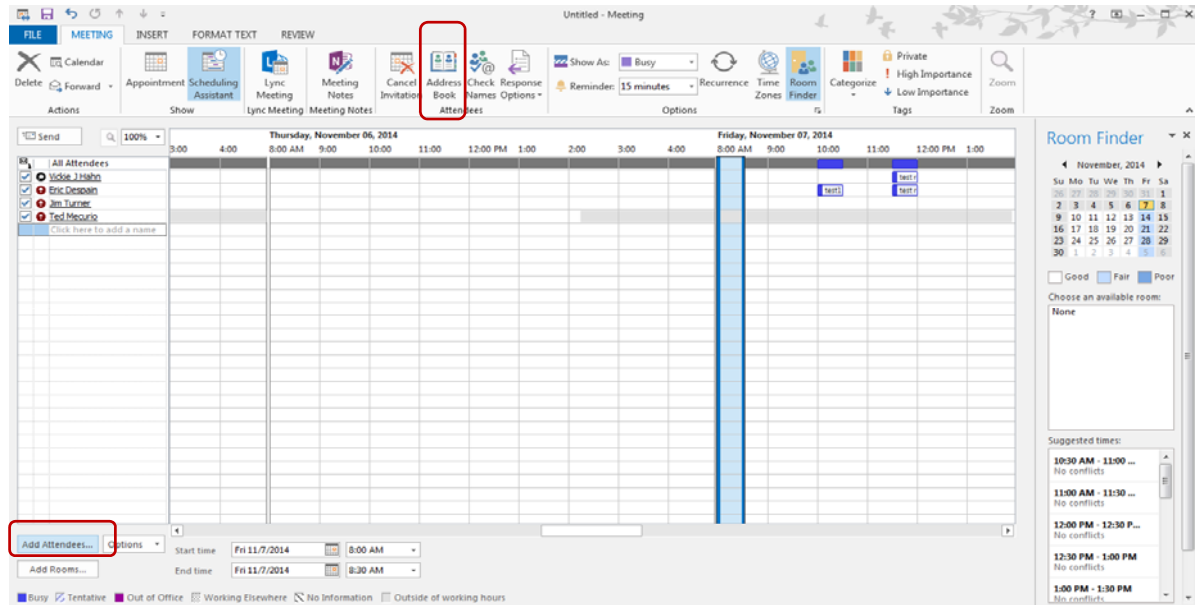
OR

If you wish to look up a person's name instead, click **Address Book** in the *Meeting* tab at the top of the screen and use the search box. Click **OK** to add the person to the scheduling view.



OR

Click **Add Attendees** near the bottom left of the screen and use the search box to find names. Click **OK** to add the person to the scheduling view.




5. You may add as many peoples' names as you wish. Note that every time you add a person's name, you will be able to see when they are free and when they are busy. You may see the following color indicators:


Blue: The time is marked as *busy*.


Blue and White Striped: This time is scheduled with *tentative appointments*.


Purple: This time is marked as *out of office*.


Black and White Striped: Outlook has *no information* for this time (the user may not be an Outlook/Exchange user, a UWEC user, or does not have an Outlook Calendar set up).

6. **Optional:** To classify attendees, click the arrow to the right of the icon  next to the attendee's name, and select the desired classification. Attendee classifications are taken into account by the *Suggested Times*.

 **Organizer:** This is the creator of the meeting; it will by default appear to the left of your name (and will not be an option for other attendees). This position is regarded as necessary by the Suggested Times list.

 **Required Attendee:** Invitees to be regarded as necessary by the Suggested Times list. Invitees are by default listed as required.

 **Optional Attendee:** Invitees for whom attendance is optional; separated from Required Attendees in the Suggested Times list.

 **Resource:** This label marks rooms or equipment added to the meeting, and is regarded as necessary by the Suggested Times list

7. **Add Rooms** – Please note the **Add Rooms** option is not connected with our Ellucian system. **All meeting rooms must be reserved through Room Reservations.** To check availability of a room via email: roomreservations@ncstatecollege.edu, or by phone x4542 or x4521.

8. At the bottom of the screen, you can set the start and end dates and times. To change the date you are viewing on the screen (and the date for which times will be suggested in the *Suggested Times* list), click the calendar icon and select the appropriate date. To change the time, use the dropdown menus.

Note: When you change the time, you are changing the *duration* of the meeting in the *Suggested Times* list: it will only suggest openings that fit that duration.

9. From the *Suggested Times* list, choose the desired time. Conflict-free times appear at the top of the list.
10. Click **Appointment** in the *Meeting* tab at the top of the screen. This will return you to the *Appointment* screen. You will see the details for the date and time you selected. Add a subject and location in the appropriate text boxes. If desired, enter text to appear in the body of the message.

11. Click **Send**.

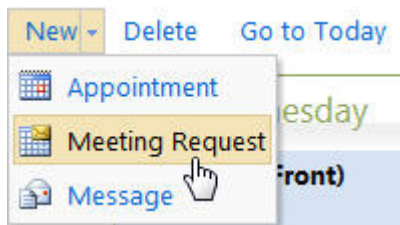


Webmail (Outlook Web App)

You can also use the *Scheduling Assistant* in Webmail, the Outlook web app. The *Scheduling Assistant* is capable of taking a great number of variables into account when helping you to schedule a meeting. This section will explain how to create a new *Meeting Request* and schedule that request using the *Scheduling Assistant*.

Creating a New Meeting Request

1. In Outlook, at the bottom left of the screen, click **Calendar**.
2. Near the top left of the screen, click **New** and select **Meeting Request** from the dropdown menu.



3. A new window appears. Select the **Scheduling Assistant** tab.
4. The *Scheduling Assistant* view appears. You will see your name and schedule in the top row.

Appointment **Scheduling Assistant**

Start: Fri 11/7/2014 10:00 AM End: Fri 11/7/2014 11:00 AM

Show only working hours

Select Attendees

- Vickie J. Hahn
- Jim Turner
- Brian Baldrige
- Add a name

Select Rooms

- Add a room

Friday, November 07, 2014

3:00 PM 4:00 PM 8:00 AM 9:00 AM 10:00 AM 11:00 AM 12:00 PM 1:00 PM 2:00 PM 3:00 PM

Suggested Times

< November 2014 >

S M T W T F S

26 27 28 29 30 31 1

2 3 4 5 6 7 8

9 10 11 12 13 14 15

16 17 18 19 20 21 22

23 24 25 26 27 28 29

30 1 2 3 4 5 6

Duration: 1 hour

10:30 AM 3 of 3 free

12:00 PM 3 of 3 free

12:30 PM 3 of 3 free

1:00 PM 3 of 3 free

3:00 PM 3 of 3 free

3:30 PM 3 of 3 free

4:00 PM

Busy Tentative Away No Information

Good Fair Poor

Note: On the right-hand side, you will see the *Suggested Times* list. As you had attendees to your meeting, this list will adjust to provide possible meeting times when all required attendees and/or locations are available. The times correspond to the date and meeting duration you have currently selected (more information on this can be found below).

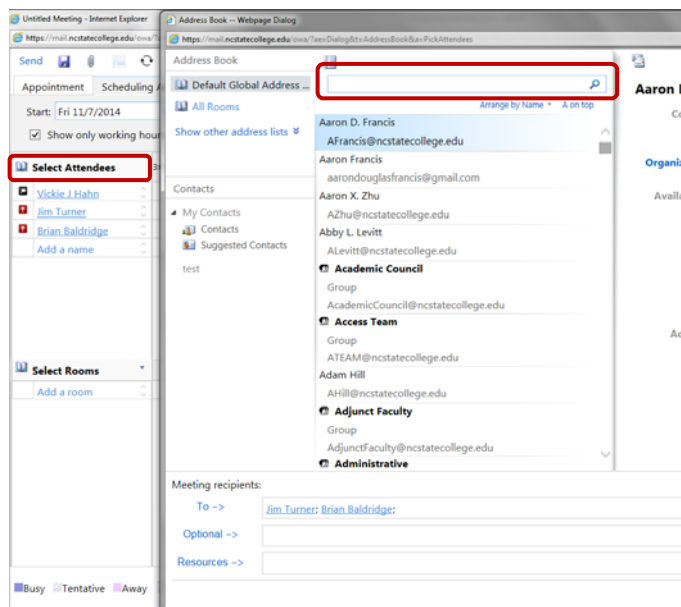
5. There are multiple ways to add attendees to your meeting requests:

If you know the name of the person (or people) you wish to add, click in the space under your name that says **Click here to add a name**, and type in the person's name or username.

Example: John Smith or jsmith

OR

If you wish to look up a person's name instead, click **Select Attendees**, found at the top of the list, and use the search box. Click **OK** to add the person to the scheduling view.




5. You may add as many peoples' names as you wish. Note that every time you add a person's name, you will be able to see when they are free and when they are busy. You may see the following color indicators:


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8. At the top of this window, you can set the start and end dates and times. To change the date you are viewing on the screen (and the date for which times will be suggested in the *Suggested Times* list), click the dropdown arrow and select the appropriate date on the calendar. To change the time, use the dropdown menus.

Note: When you change the time, you are changing the *duration* of the meeting in the *Suggested Times* list: it will only suggest openings that fit that duration.
9. From the *Suggested Times* list, choose the desired time. Conflict-free times appear at the top of the list.
10. Click the **Appointment** tab at the top of the screen. This will return you to the *Appointment* screen. You will see the details for the date and time you selected. Add a subject and location in the appropriate text boxes. If desired, enter text to appear in the body of the message.
11. Click **Send**.