Office 365: Calendar

This class will introduce you to Office 365 and cover the calendar components found in the Outlook app within Office 365. To access the Outlook app, you will need to log into Office 365.

Accessing and Logging In

Office 365 is available anywhere with an internet connection. Office 365 works with desktop computers, laptops, tablets and other mobile devices. To access and log into Office 365 go to:

uwm.edu/office365

Once at the login screen, type in your UWM email address and password.

Calendar

Calendar is the app within Office 365 for viewing, creating and managing your calendar. To open the calendar, click the Outlook icon.

![Outlook icon in Office 365 app list]

7/8/2019
Once Outlook has opened, click the Calendar button at the bottom of the left pane to view the calendar.

**Calendar Working Screen**

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Apps Grid</td>
<td>Allows you to move between the different apps in Office 365.</td>
</tr>
<tr>
<td>2 Tool Bar</td>
<td>Contains options to create a new event, share, and print the calendar.</td>
</tr>
<tr>
<td>3 Mini Calendar</td>
<td>Use to navigate from one date to another. Shading indicates the dates you are currently viewing, and darker shading marks the current date.</td>
</tr>
<tr>
<td>4 Calendar or Navigation Pane</td>
<td>This section lets you create other calendars, such as a calendar for a specific project or to track personal appointments. You can also add other people’s calendars and select which to display.</td>
</tr>
<tr>
<td>5 Navigation Options</td>
<td>Use this to navigate the calendar. Click the arrows on either end to see the dates before or after those displayed.</td>
</tr>
<tr>
<td>6 View Options</td>
<td>Select the view you want.</td>
</tr>
<tr>
<td>7 Main Window</td>
<td>The main window, where calendars display. Double-click any white space in this window to create a new calendar item or, click and drag to create a new item in the time selected.</td>
</tr>
</tbody>
</table>

**NOTE:** Office 365 is a cloud service updated and maintained by Microsoft. As a cloud service, Microsoft can update and change features in Office 365 as needed. UWM has little to no control over these changes and parts of this document may be incorrect after printing/publishing because of these updates.
Calendar Views

By default, your calendar will show the work week view, which displays Monday through Friday. You can temporarily change this view using the view options. To change the default view, you will need to make this change in the Settings; Settings will be covered towards the end of this class.

Day, Work week, Week, Month and Today View

1. To change to a different view, locate the view options in the upper right corner.

   ![View Options]

2. Click any other view (Day, Work week, Week, Month or Today) to change the calendar view. Clicking on Today will change the view to the current date.

Navigating the Calendar

Whenever you access the calendar app, it will show the current date as part of the view you have set. To move to other dates, there are multiple ways to navigate the calendar.

Using Navigation Options

The navigation options are located above your calendar and will vary based on your view.

1. Switch to Week view (if necessary).

2. Locate the navigation options above your calendar and click on the left or right arrows to navigate your calendar.

   ![Navigation Options]

3. Change to Day view and notice that the date range options are now individual dates.

   ![Date Range Options]

4. Click the down arrow next to the date to bring up mini calendars by date and month.

   ![Mini Calendar]

Using the Mini Calendar

The mini calendar is a quick way to move to a date that is in the past or future. The mini calendar will not change based on your calendar view, but instead will shade dates according to your calendar view.
1. Locate the mini calendar on the left side of the screen. Clicking on a specific date will cause your calendar to display that date in your current view.

2. To move forward or backward a month at a time, click the left and right arrows on either side of the calendar heading.

3. To move forward or backward by year, click the calendar heading (where the month and year are displayed) to change the mini calendar to a yearly overview. Use the left and right arrows on either side of the calendar heading to navigate years and click on a month.

Viewing a Calendar Event

The blocks of time that are shaded on your calendar are scheduled calendar events. These may include appointments (events that you create for yourself with no one else invited) and meetings (events that include multiple people and possibly a location).

1. Locate an event on your calendar; click once to see the details.

2. A bubble appears next to the event with details including where the event is located, the date, beginning and end time. If there were people invited, the number of responses is also be included.
Creating a New Calendar Event

When creating calendar events, you can create an appointment for yourself or a meeting with others and a meeting room.

Creating an Appointment: Click and Drag

1. To create an appointment, locate the date for the appointment then click and drag over the time you want.

2. A pop up will appear next to the time slot you choose with a blinking cursor. Type the name of the appointment in the first text box. If you wish, add a location and modify the start and end times.

3. Press the Enter key on the keyboard to save the details of your event and to commit it to your calendar. Notice that the main details of the event display on the calendar entry.

NOTE: If you have multiple personal calendars or are an Editor or Delegate for a calendar, as you type in the appointment name, a drop-down box will appear with the names of the calendars you can schedule. Choose the desired calendar from the list.

Creating an Event: New Event

For a more detailed appointment, meeting or an all-day calendar event, you will need to use the new event dialog box.

1. In the upper left corner of the screen locate and click the New button or, double click a time block on the calendar.

2. The new event window appears.
3. Type in a name for the appointment in the **Add a title for the event** box.
4. If necessary, add a **Location**.
5. To add meeting participants, click in the **Add People** box and begin typing the email address for an attendee. As you type, a list of suggestions may appear. Choose a name from the list.
6. If you do not see the person you are looking for in the list, click on the **Add attendees** button to run a search for what you typed in the attendee box.
7. Choose a **Start/End** date and time using the pull-down boxes.
8. To set an event as an all-day occurrence, check the box for **All day**.
9. If you do not want others to see the details of this meeting, check the box for **Private**.
10. If necessary, set up a schedule for repeating this appointment using the **Repeat** pull-down box.
11. If you have more than one calendar, you can choose which calendar will have this appointment using the **Calendar** box.
12. Set the time for a meeting **Reminder**; this setting can be changed by default in the calendar settings.
13. Choose the **Show as** status. If others are looking to schedule you at this same time, they will see your time blocked per this status.
14. If necessary, you can add in notes or an agenda in the area at the bottom of the new event window.
15. When all details are entered, you can click the **Save** button in the upper left corner of the new event window. If you invited attendees to the meeting, an email is sent to them notifying them of the meeting.
Editing a Calendar Event

Once you have created a calendar event, you can make changes if the details or attendees change.

1. Locate the calendar event you want to edit.
2. Left click on the event and from the pop-up window, choose **Edit**.
3. Edit the event as needed and then click **Send** at the top of the edit screen.

**NOTE**: If you are just changing the time or date of a calendar event, you can click and drag the event to the new date/time and this will bring up a window for confirmation.

Canceling a Meeting

Sometimes after creating a meeting, you need to cancel the meeting and delete the calendar entry. You can cancel the meeting by left clicking or right clicking on the meeting.

**Canceling a Meeting: Left Click**

1. Locate the calendar event you want to delete from the calendar.
2. Left click on the meeting and from the pop-up window, choose **Cancel** (or **Delete**).
3. In the **Cancel event** confirmation box, choose **Yes**.
4. Type a message in the email message window and then click **Send**.

**Canceling a Meeting: Right Click**

1. Locate the calendar event you want to delete from the calendar.
2. Right click on the meeting and from the menu choose Cancel (or Delete).

3. Choose to edit the cancellation email or to send it now. If you are editing the email, click Send when finished.

**NOTE**: If you are canceling an event that has no attendees, you will see the option to Delete the event rather than cancel it.

## Replying to a Meeting Invitation

When you are invited to a meeting, you receive an email message with the meeting details and a request for your attendance status. You should set your attendance status so the organizer knows if you will attend.

### Replying from the Email Message

1. Switch to your email and locate an email message inviting you to a meeting. Click on the message to open it in the reading pane.

2. View the meeting details, notice that the email checks your calendar and informs you of any conflicts.

3. To set your attendance status, click **Accept**, **Tentative** or **Decline**.
4. A sub-menu will appear asking if you want to respond to the meeting creator to let them know your status. Choose an option and if necessary, edit the response before sending.

NOTE: If you choose Don’t send the response, a response is not sent to the meeting creator and your response is not recorded in the response tally. Your calendar will show your chosen status, but the meeting organizer will not know your status.

5. The email message is deleted. When you switch back to your calendar, the meeting will display the status that you choose in the email message.

Replying from the Calendar

When someone invites you to a meeting, the meeting appears on your calendar in a faded color with a striped bar on the left side of the meeting time block indicating that you have not set your attendance status for this meeting. You can set your status directly from the calendar entry using a left click or right click on the mouse.

Replying from the Calendar: Left Click

1. Switch to the calendar (if necessary) and locate a meeting that does not have an attendance status set.

2. Left click on the meeting and then click on the checkmark, (accept) the question mark (tentative) or the red X (decline).

3. A sub-menu will appear asking if you want to send an email message back to the meeting creator to let them know your status. Choose an option and if necessary, edit the response before sending.

4. Your status is set on the calendar and the email message in your Inbox is deleted.
Replying from the Calendar: Right Click

1. Switch to the calendar app (if necessary) and locate a meeting that does not have an attendance status.

2. Right click on the meeting and hover over Accept, Tentative, Decline or Propose new time.

3. A sub-menu will appear asking if you want to send an email message back to the meeting creator to let them know your status. Choose an option and if necessary, edit the response before sending.

4. Your status is set on the calendar and the email message in your Inbox is deleted.

Changing Your Attendance Status

Once you have set an attendance status (either using the email message or directly on the calendar), you can change your response using the calendar.

1. Locate the meeting where you want to change your attendance status.
   - Left click on the meeting and choose Accept, Tentative or Decline.
   - Or-
   - Right click on the meeting and hover over Accept, Tentative or Decline.

2. A sub-menu will appear asking if you want to send an email message back to the meeting creator to let them know your status. Choose an option and if necessary, edit the response before sending.

   NOTE: If you declined a meeting and now want to accept it, you will need to locate the original meeting invitation in the Deleted Items folder in your email.

Creating a New Calendar

There are times when you need to schedule events on the calendar but do not want them to appear on your main calendar. The calendar app allows you to create multiple calendars and to organize them into groups.

1. In the calendar pane on the left side of the screen, right click on Your calendars and choose New calendar.
2. In the text box that appears, type the name of the new calendar and press the Enter key.

3. To change the color of the calendar, right click on the new calendar, hover over Color and then choose a color from the sub-menu.

   ![Calendar Color Menu]

4. To rename the calendar, right click on the calendar and choose Rename. Edit the name in the text box and press the Enter key to confirm.

**Viewing Multiple Calendars**

When you have multiple calendars in your account, you can choose which calendar or calendars you would like to see displayed in the main window.

1. Hover your mouse over the title of the calendar you want to view in the main window.

2. Click the title of the calendar; that calendar will appear in the calendar window. The name(s) of calendars that you are currently viewing appears at the top of the main window.

3. To remove a calendar from the main window, click on the calendar name in the navigation pane or the X on the calendar tab.

**Scheduling an Event on the New Calendar**

When you want to schedule on another calendar besides your default calendar you can choose the calendar in the event window.

If you are creating a meeting with attendees and you want to track attendance status, you must schedule on your main Calendar. If you schedule on a sub-calendar, attendance status is not recorded for attendees.

1. In the upper left corner of the screen, click the New button.

2. In the new event window, locate the Calendar box, click on the pull-down arrow and choose the name of the calendar you want to use to schedule the event.

   ![Event Calendar]

3. Continue to schedule the event and click the Save button at the top when finished.
Sharing Your Calendar

You can share your calendar with other Office 365 users and non-Office 365 users. Various permission levels range from viewing time when someone is busy to being able to respond to meeting requests for someone else.

The following table gives more information about permission levels:

<table>
<thead>
<tr>
<th>Permission Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Can view when I’m busy</td>
<td>Shows free/busy information</td>
</tr>
<tr>
<td>Can view titles and locations</td>
<td>Shows free/busy information including subjects and locations</td>
</tr>
<tr>
<td>Can view all details</td>
<td>Shows all information for calendar events</td>
</tr>
<tr>
<td>Can edit</td>
<td>Edit and delete calendar entries, schedule events</td>
</tr>
<tr>
<td>Delegate</td>
<td>Edit and delete calendar entries, receive/respond to calendar invitations, schedule events</td>
</tr>
</tbody>
</table>

**NOTE:** If you have events marked as private on your calendar, assigning permissions to someone else will not give them access to the private events. The only exception to this is if someone has Delegate permissions and you assign permissions to view private events. Delegate permissions alone will not give a user access to your private events.

Sharing a Calendar

1. In the calendar pane, right-click on the calendar you want to share and choose **Sharing permissions** or, on the top toolbar, click the **Share** button.

2. Type in the email address for the person you want to share your calendar with in the **Enter an email address or a contact name** box.

**NOTE:** You can also type in the email address of a non-UWM user in the **Share** box. When you share your calendar outside of UWM, you can give viewing permissions but not editing permissions.

3. If you want to share with additional people, add their names to the **Share** box.
4. Assign permission levels to each person using the drop-down box next to their name. If you are setting permissions for a calendar other than your main Calendar, you cannot assign Delegate permissions.

**NOTE:** If you assign Delegate permissions, you can also choose to allow the person to see private appointments by checking the box for Allow viewing of private appointments. In addition, delegate permissions will send meeting invitations to the delegate and the calendar owner. To modify this setting, see the next section on changing permissions.

5. Once all permission levels are set, click **Done** at the top of the pane.

### Changing Permissions

Once you have shared your calendar, you can edit or remove permissions.

1. Right click on the shared calendar in the calendar pane and choose **Sharing permissions**.

2. In the pane on the right, you can see all the permissions for this calendar.
   
   a. To change permission levels, use the drop-down box to choose a different level.
   
   b. To remove permissions, click the **trash can icon** to the right of the permissions.

3. When you have finished changing permissions, click the **Done** button at the top of the pane.

**NOTE:** If you change permissions, the user will receive an email message indicating the new permissions.

### Accepting a Shared Calendar

When someone else shares a calendar with you, an email message is sent to you giving the details of the calendar and the option to add the calendar.

1. Locate the email message that shares the calendar to you and click on it to open it in the reading pane.

2. The email message tells you who the calendar belongs to and gives you the ability to accept it and add it to your calendar listing. Click the **Accept and view calendar** button in the message to add the calendar.
Working with a Shared Calendar

If you have **Can edit** or **Delegate** permissions to a calendar, you can edit and delete calendar entries and create calendar events on the shared calendar. If you have **Delegate** permission, you can also receive meeting invites.

**NOTE**: If you manage a calendar for someone, the recommendation is that you **use the Outlook desktop client instead of Office 365** as the Outlook desktop client offers a full set of features for calendar management.

Editing a Meeting

To edit a meeting, follow the same steps as above for editing a meeting. If you add or delete participants in a meeting, the email notification they receive is sent from you on behalf of the owner of the calendar.

Deleting a Meeting

To edit a meeting, follow the same steps as above for editing a meeting. If there were participants in the meeting, the email notification they receive is sent from you on behalf of the owner of the calendar.

Accepting a Meeting Invitation

As a Delegate, you will receive email invitations for the owner of the calendar. This email looks almost identical to an email invitation sent to you, but with one difference; at the bottom of the email message, it says **Received for** and then the name of the calendar owner.

You can set the attendance status and if you send a response to the meeting creator, the email reply is from you on behalf of the calendar owner and it will say that you accepted the meeting.

Scheduling a Meeting

Editors and Delegates can schedule events on a shared calendar as if they were the owner of the calendar. If attendees are added to the event, the meeting invitation is sent by the shared user on behalf of the owner of the calendar.

1. Check the box for the shared calendar you want to use for scheduling a calendar event.
2. Create a new calendar event by clicking the **New event** button in the upper left corner of the screen
3. In the new event window, locate the **Calendar** box and click to view the options. From the list, choose the name of the shared calendar.
4. Fill in the rest of the event details and then click **Save**.
View a Non-Shared Calendar

All UWM users can see the free/busy time of most other UWM users without that user sharing their calendar.

1. Right click on Your calendars and choose Open calendar.
   
   ![Open calendar](image)

2. In the From directory box, type the email address of the user. Then click Open.
   
   ![Open calendar](image)

   **NOTE:** You can also subscribe to calendars from the internet by typing in a web address in the Internet calendar box.

3. The calendar appears in your listing. If you no longer need the calendar, you can right click on the calendar and choose Remove.

Printing a Calendar

Sometimes you need a paper copy of your calendar. You can choose which view you want to make the most effective use of your printout.

1. Click the Print button on the toolbar. This takes you to the print preview window.

   ![Office 365](image)

2. From here, you can choose the Calendar you want to print, the View you want to use, the Layout and the beginning and ending times.

   ![Print](image)

3. After choosing your settings, click the Print button in the upper left corner.
Calendar Search

Using the calendar search tool, you can quickly locate calendar entries.

1. Click in the Search calendar text box above the mini calendar on the left side of the screen to begin your search.

2. Type in your search term(s) and press the Enter key on the keyboard. This will return results in a list.

3. Clicking on a result in the middle pane will show the calendar entry in the right pane.

4. To return to your calendar, click the X at the end of the Search calendar text box.

Calendar Settings

Office 365 has many settings you can change to customize your calendar.

To access the Settings:

1. From the calendar, locate the Settings button (gear icon) in the upper right corner and click on it.

2. Under Your app settings, choose Calendar.

3. The Options menu appears on the left side of the screen.

4. If necessary, click the arrow pointing towards the word Calendar to expand the calendar options section.

5. From here, you can change the settings for Personalization, Automatic processing, Notifications, Shared calendars and Other calendars.

6. When you have finished changing a setting, click the Save button at the top of the window.
Sign Out

When you are finished with Office 365, you should sign out before closing the browser window.

1. Click the person icon or your photo in the top, right corner of the screen.

2. In the menu, choose Sign out.

3. You are now signed out of Office 365; close the browser to complete the process.

Getting Help

For a full listing of all Short Courses offered, visit uwm.edu/learningtechniques. For 24/7 access to online technical training videos, visit uwm.edu/lynda.

For technical assistance, contact the UWM Help Desk by calling 414-229-4040 (toll-free 877-381-3459) or visit GetTechHelp.uwm.edu.