



MCS Exchange

Scheduling a Meeting in Outlook 2003

Document Description: How to schedule a meeting and book a meeting room resource using Outlook 2003.

For use by: All staff on the Exchange Email Server using Outlook 2003.

1. Click the left Calendar navigation pane
2. Click on the day/month to select the date for the meeting
3. Double-click the time slot on the day required (right navigation pane)
4. Type the name of the meeting in the Subject line
5. Type the start and end times for the meeting
6. Click the Invite Attendees button
7. Click the To button to show the Global Address List
8. Type the name(s) of the staff and resources you want to attend/book
9. Click OK
10. Click Send

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1. Background

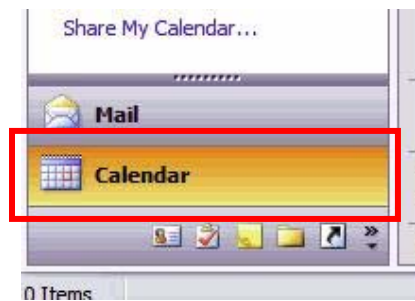
One of the nice features of Microsoft Outlook is to be able to plan meetings using the calendar system whilst checking the availability of attendees. This functionality is also extended to checking the availability of, and ultimately booking a physical location in which to conduct the meeting. For the purposes of this document these locations are referred to as meeting rooms.

This guide will step through the process of planning a meeting, inviting the people who need to attend and booking a meeting room.

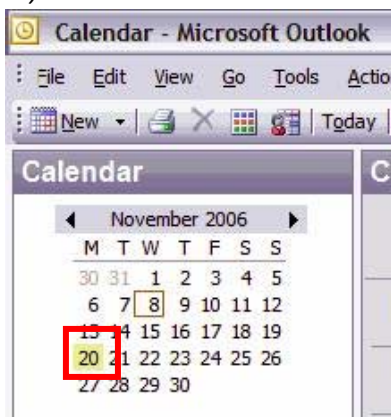
The first step in the process is to determine when the meeting should take place. In this example we will organise a meeting to take place on Monday, November 20 at 9am, scheduled by the user Exchange Test Two. To commence the process we need to open the calendar and move to this date.

2. Scheduling a Meeting

2.1. Start Outlook and open the calendars panel

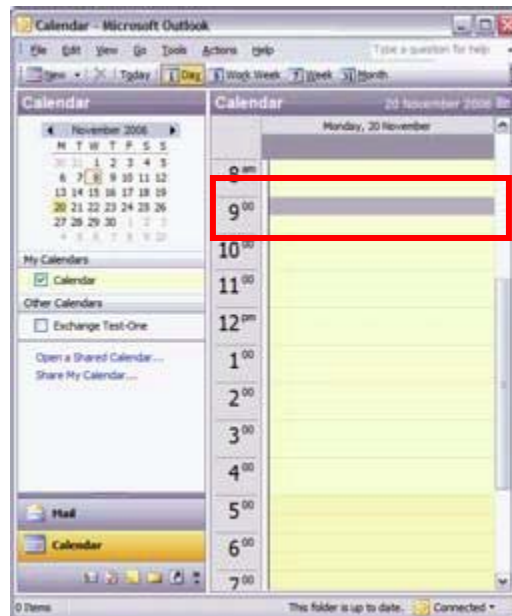


2.2. In the left pane showing the months and days, click on a date you wish to make an appointment (e.g. 20th of November 2006).





2.3. In the right pane, **double-click** in the time slot required for the meeting (e.g. 9am). *An alternative to this step is to click the **New** button in the top left of the window (under the File menu)*



2.4. This will open the following dialogue box.

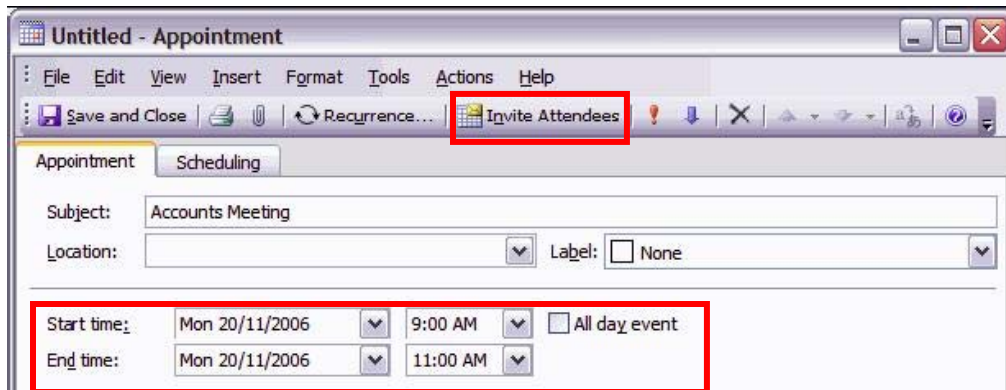


2.5. This dialogue box contains fields for all of the pieces of information required to plan the meeting. The first item to enter is the subject (e.g. we are planning a meeting with the subject "Accounts Meeting").



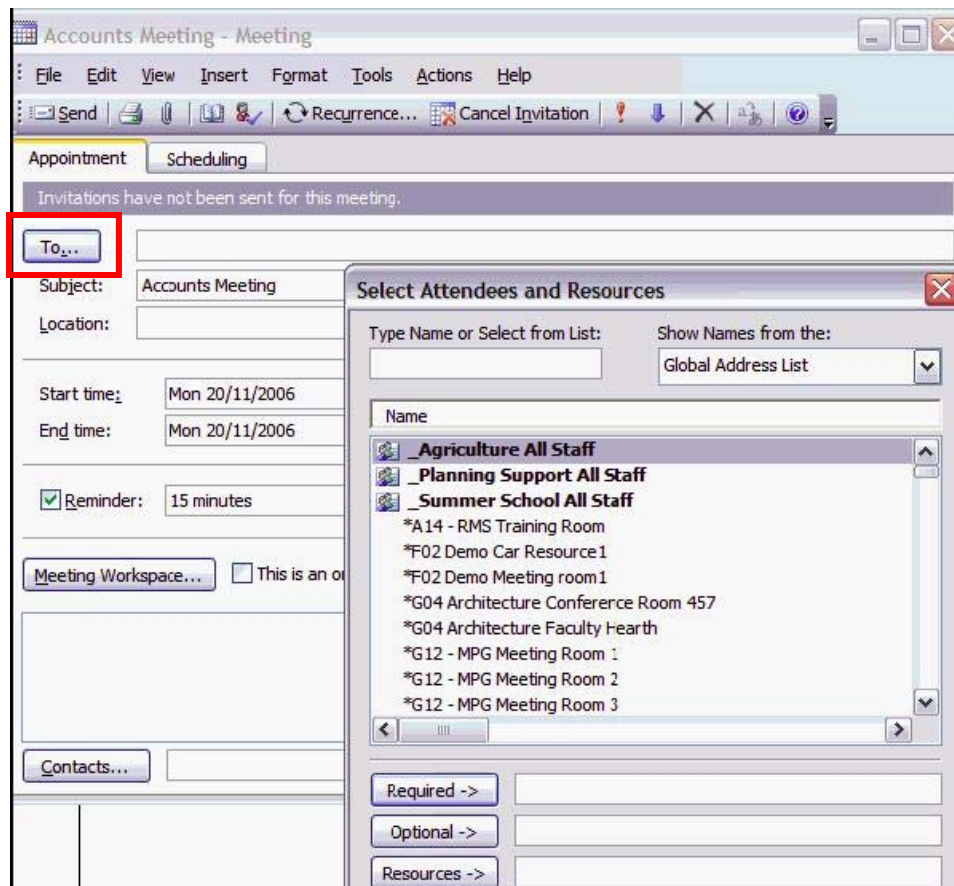
2.6. Allocate the time to this meeting. For example, in this case from 9:00am to 11:00am.

Note: you can either type the times in manually, or use the drop down boxes.



2.7. Click the **Invite Attendees** button to invite people to come.

2.8. Click the **"To..."** to get the **Select Attendees and Resources** window displayed.





2.9. From here, select the users you wish to invite to the meeting.

At this point also select the meeting room you wish to use; for our example meeting we have selected the meeting room "G12 – MPG Meeting Room 1" and have placed this in the "Resources" category.

Within the "Required" area, we have entered the attendees who are required to attend the meeting. The Optional section contains invitees whose attendance is optional.

Once all the attendees and resources have been selected, select **OK**.

Select Attendees and Resources

Type Name or Select from List: Show Names from the:

Name

- *G12 - MPG Meeting Room 1
- *G12 - MPG Meeting Room 2
- *G12 - MPG Meeting Room 3
- *G12 - MPG Meeting Room 4
- *G12 FMO Meeting Room 4
- *G12 FMO Meeting Room 5
- *G12 FMO Meeting Room 6
- *G12 FMO Meeting Room 7
- *H08 - Meeting Room
- *H08 - Meeting Room 208
- *H08 Hatch Festiva WLQ717

Required ->

Optional ->

Resources ->

Advanced



- 2.10. Attach any documentation within the invitation if necessary, by clicking on the paperclip icon and selecting a file(s).

Once the meeting details have been completed, click the **Send** button.

All the invitees will receive this invitation and have the opportunity to **accept** or **decline** the invitation. The meeting organiser will receive notifications and will be able to keep track who has not replied.

The organiser will also be advised as to whether or not the meeting room is available, and if not available will have the option to suggest another time and send an updated invitation to all invitees.

***Note:** other options you may want to use are setting a reminder and scheduling recurrence (for regular meetings).*