

UNIVERSITY OF WATERLOO



# Exchange 2010 Calendar Using Outlook Web App (OWA)

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at the University of Waterloo

**Information Systems and Technology**

**11/10/2010**

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## 1 Before Getting Started

There are two common ways to manage your calendar in Exchange. One way is using the Outlook client, and the other way is using the Outlook Web App (OWA). This document describes how to use the Outlook Web App (OWA). There is another document available from IST that describes how to use the Outlook client, for both Outlook 2007 and Outlook 2010. OWA works well with Safari, Firefox and Internet Explorer. Other web browsers are supported in a “Light” version which does not provide all features.

Before we get started to describe how to use OWA to manage your calendar, it is important for you to understand what it can and can't do. OWA does not have as many features as the Outlook client. The following features are not available in OWA (but are available in the Outlook client):

- The scheduling assistant does not see free/busy information for the members of a defined group.
- There is no option to email meeting reminders. The OWA has pop-up messages only, and these occur only when OWA is open.
- You can offer various viewing rights on your calendar, but can't allow scheduling or delegate rights.
- Must view Calendars and Task lists separately only.

The following features are not available in OWA or in the Outlook client. These are features which some may have used in Bookit.

- Calendars can be posted to the web using Windows LiveID. Another option for doing this is being investigated.
- No importance levels to meetings, other than using a personalized colour coding system. Meetings can be set as high priority or low priority, which will mark the associated high priority emails, but the importance level is not visible in most calendar views.
- University holidays will not initially be added to Exchange Calendar.
- It is important to book people using their Exchange email address, as an alternate email address will not be linked to their Exchange personality, and will not show their free/busy information.
- Meeting attendees cannot see if meeting invitees are attending the meeting, or not (only the meeting organizer can see this information).

**Recommendation:** OWA will be fine for anyone who is invited to meetings, but doesn't schedule meetings for large groups on a regular basis. Anyone who administers resources should use the Outlook Client.

## 2 Your Exchange Account

To use Exchange Calendar, you need an account on the Exchange server. If you are already using Exchange for email, and have an account @connect.uwaterloo.ca, then you already have a calendar on the Exchange server and can start using calendar.

If you do not have a connect account, you can request one by sending email to [request@uwaterloo.ca](mailto:request@uwaterloo.ca). In addition to using Exchange Calendar, you can also use Exchange for email. If you want to continue with your existing email set-up, it will be necessary to forward your connect email to your regular account.

### 2.1 Using Exchange Calendar over the Web

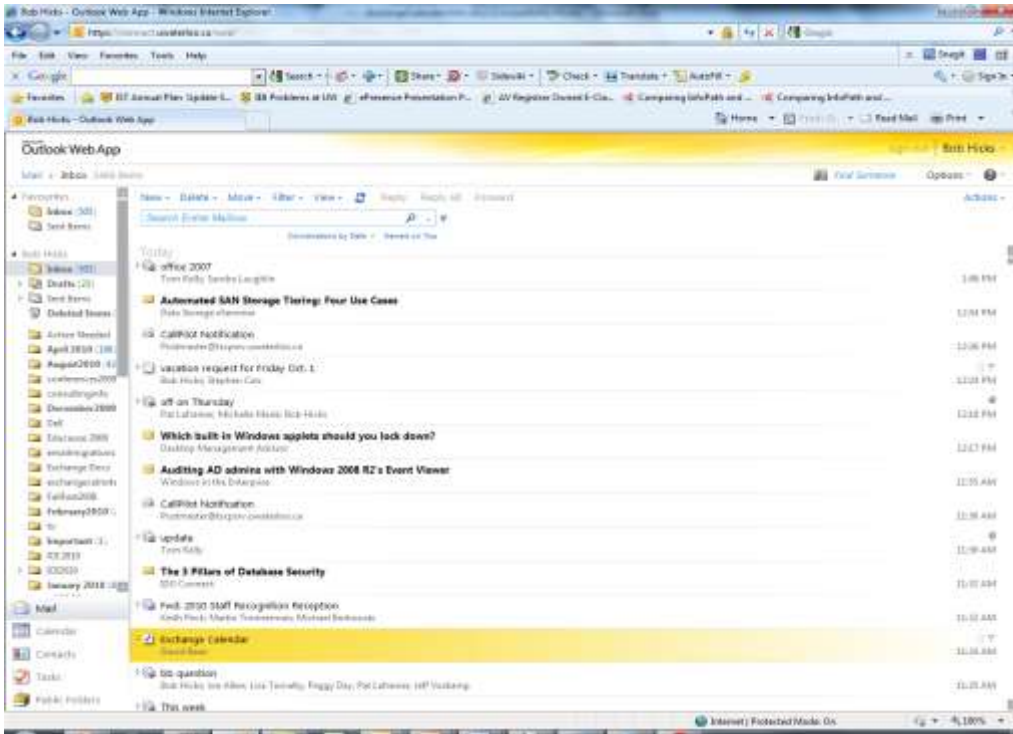
To use Exchange Calendar from the web, you connect to:

<https://connect.uwaterloo.ca>

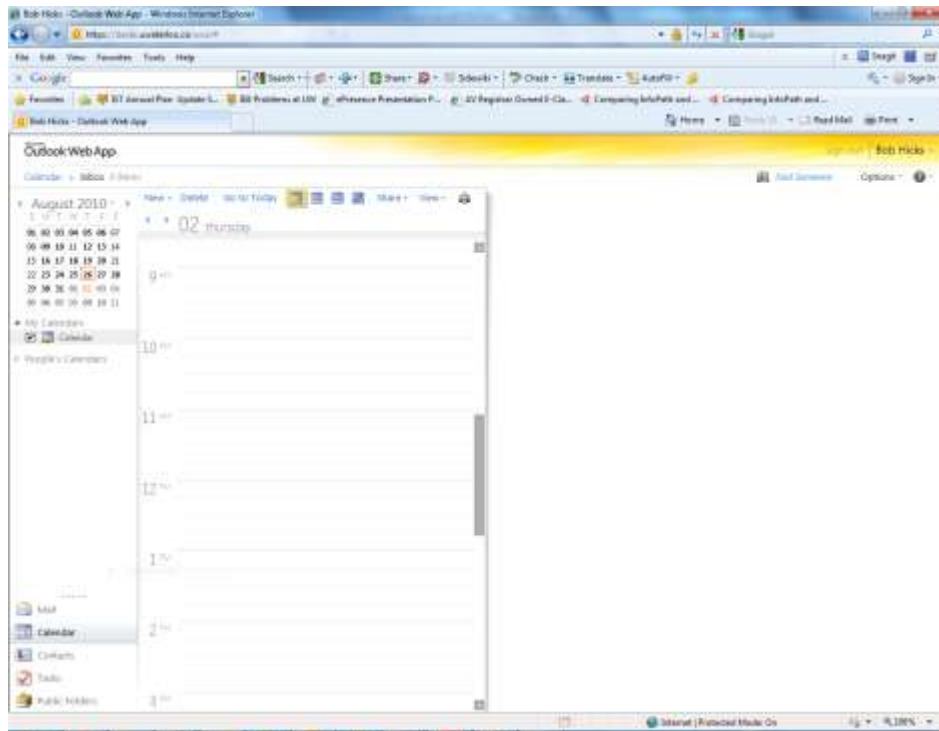


The screenshot shows the Microsoft Outlook Web App sign-in interface. At the top, it says "Microsoft Outlook Web App". Below that is a "Security" section with a "( show explanation )" link. There are two radio button options: "This is a public or shared computer" (unselected) and "This is a private computer" (selected). A warning message states: "Warning: By selecting this option, you confirm that this computer complies with your organization's security policy." There is also a checkbox option "Use the light version of Outlook Web App" which is unchecked. Below the security options are two text input fields labeled "User name:" and "Password:". To the right of the password field is a "Sign in" button. At the bottom, it says "Connected to Microsoft Exchange" and "© 2009 Microsoft Corporation. All rights reserved."

You sign in with your Exchange account, which will open OWA with your Mail account. With Exchange Calendar you will receive meeting requests through email. You will be able to respond to meeting requests directly from your email, or through your calendar.



You can then select calendar and the following window will appear:



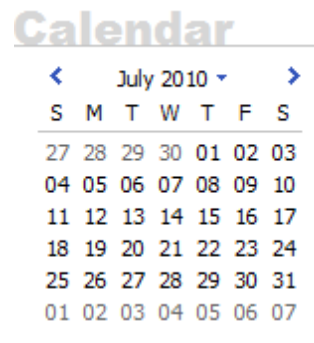
## 3 Working with Exchange Calendar

### 3.1 Browsing through Different Dates

The first thing you will want to do is pick a daily, work week, weekly or monthly view. Simply select the view you like to use in the following bar:



To move to a specific month and day, you can use the monthly calendar:



Alternatively, you can use the arrow keys on the following bar to move forward or backward through the current view, one day, week or month at a time.

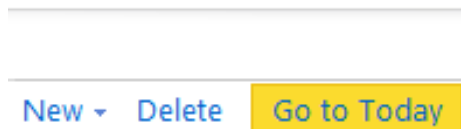


1. Here are some things to try navigating to:

- Next month
- One year from now
- Last week

### ❖ Go Back to Today

1. There is a button in the toolbar called Today that will bring you back to today's date.



## 3.2 Creating an Appointment

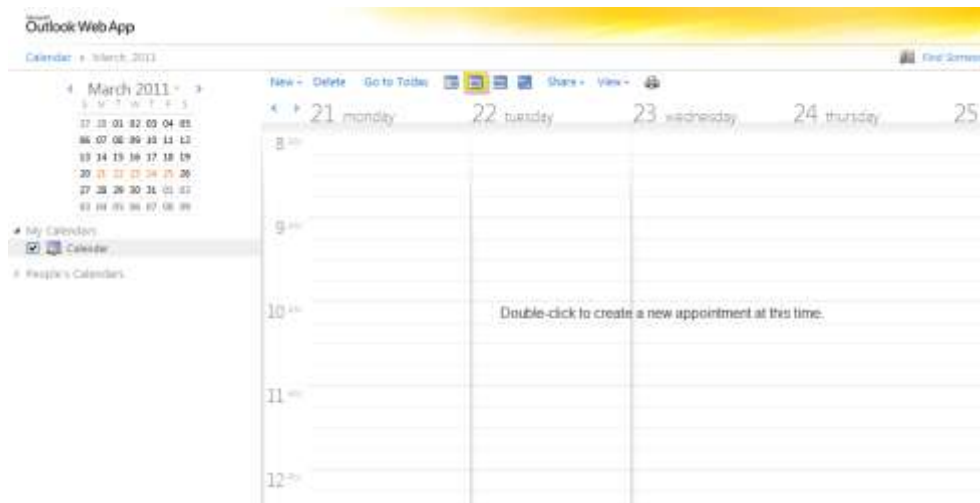
There are four types of appointments that you can choose:

1. Appointment: an appointment involves only you.
2. Meeting: you invite other people to an appointment.
3. Event: lasts all day, and might not block out time in your calendar.
4. Task: a task only involves you, and doesn't need a scheduled time.

Let's start by creating a personal appointment with no other attendees.

### ❖ Create an Appointment from the Calendar

1. Find the starting time in your calendar.

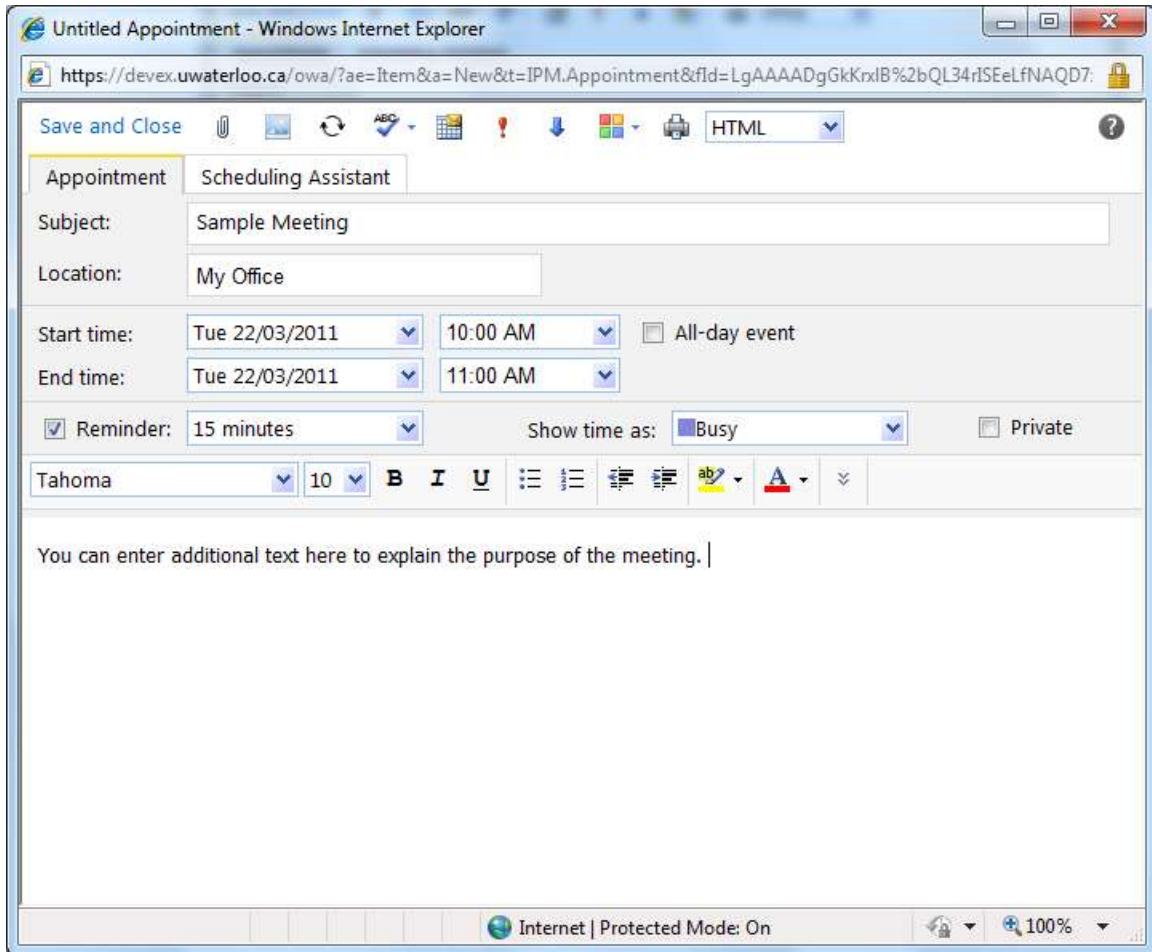


2. Double-click on the time to open a new appointment form.



3. In the appointment form, enter a subject for the meeting.

4. In the **APPOINTMENT FORM**, enter text next to **LOCATION** label.
5. Select the beginning and end dates and times for your meeting.



### 3.3 Controlling how Outlook Calendar Shows Your Time

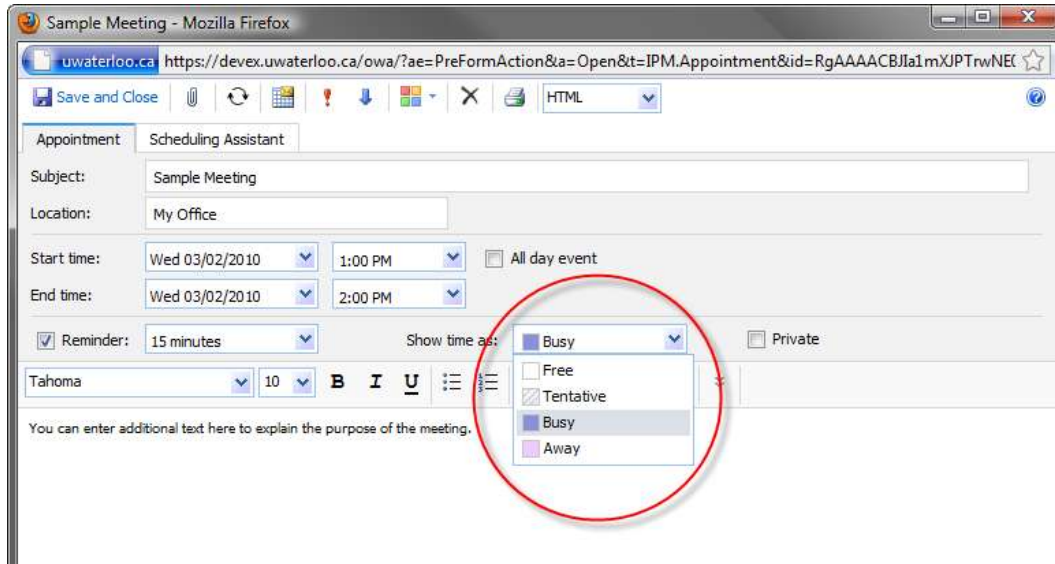
By default a new appointment will show your time as **BUSY** and so unavailable for other bookings. There are four display options you can choose:

- Free
- Tentative
- Busy
- Away

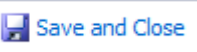
Use **FREE** when you want your calendar clear and available for booking. Use **TENTATIVE** for appointments that are not confirmed or that you are not sure you will attend. Any meetings that you are invited to are marked as tentative. Don't delete meetings or reject them out-right, or you will lose all of the information about the meeting. Once you know you will attend a meeting, you will want to mark your time as **BUSY** so that others do not double-book you. Use **AWAY** when you are out of the office.

## ❖ Make Your Meeting Tentative

1. Open your appointment by double-clicking on it, if it is not already open.
2. Click on the drop down menu next to “Show As”:



3. Click on **TENTATIVE**

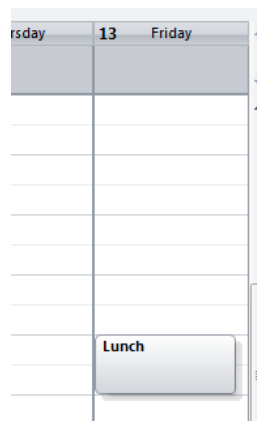
4. Click  .

### 3.4 Setting up Repeating Appointments

Now let's make a booking for Friday lunches. In order to make the Appointment appear each Friday, we will use Outlook's Recurrence feature.

## ❖ Book Friday Lunches

1. Make a booking on the first of the repeating days.

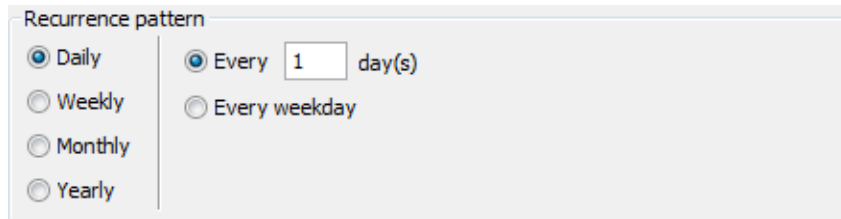


2. Double-click on the appointment and then click on Repeat.

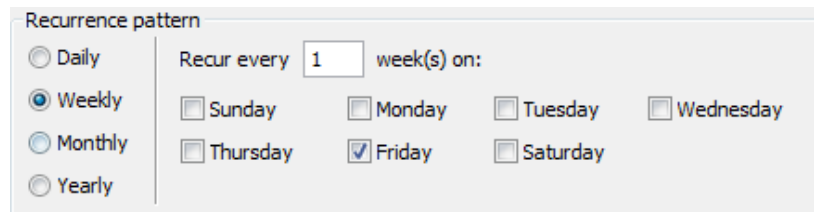


3. Now choose a Recurrence pattern, either one of the presets Daily, Weekly, Monthly or Yearly. Each preset will give different options.

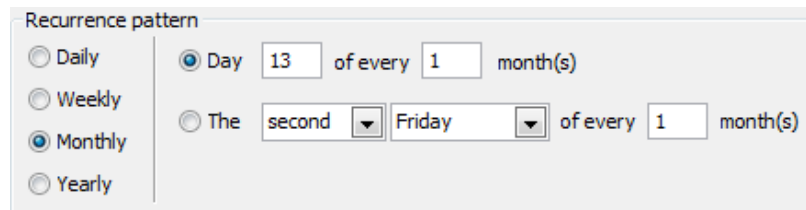
4. Daily



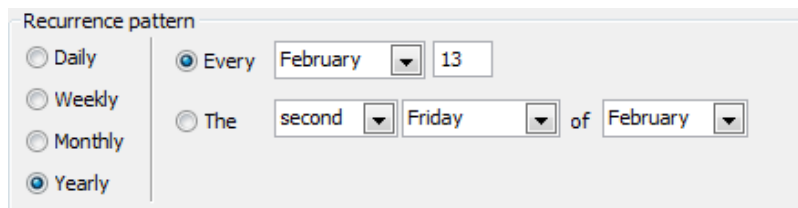
5. Weekly



6. Monthly



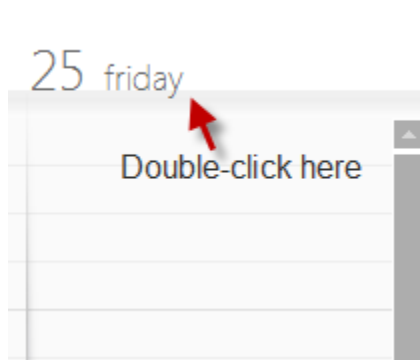
7. Yearly



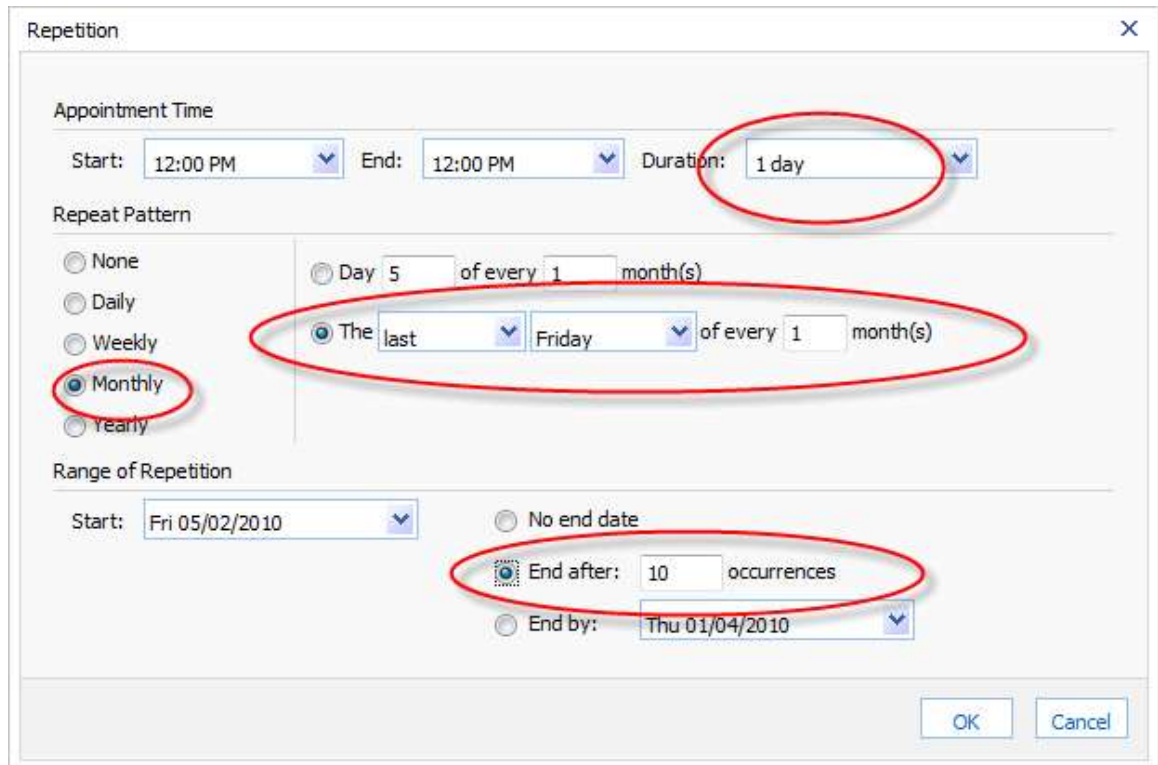
8. We will choose Weekly and End after 4 occurrences.

## ❖ Schedule Pay-Days

1. Pay day is the last Friday of every Month. Outlook understands how to calculate this. Create this as an all-day appointment by double-clicking in the grey area before the first time of the day.



2. Click on the Repeat button.
3. Outlook Web App:

A screenshot of the 'Repetition' dialog box in the Outlook Web App. The dialog has a title bar with a close button (X). It is divided into three sections: 'Appointment Time', 'Repeat Pattern', and 'Range of Repetition'. In the 'Appointment Time' section, 'Start' and 'End' are both set to '12:00 PM', and 'Duration' is set to '1 day'. In the 'Repeat Pattern' section, the 'Monthly' radio button is selected. The pattern is 'The last Friday of every 1 month(s)'. In the 'Range of Repetition' section, 'Start' is 'Fri 05/02/2010', and 'End after: 10 occurrences' is selected. At the bottom right, there are 'OK' and 'Cancel' buttons. Several elements are circled in red: the 'Duration' dropdown, the 'Monthly' radio button, the 'Repeat Pattern' section, and the 'End after: 10 occurrences' option.

## 4 Making Appointments with Other People

### 4.1 About Finding People

In order to book other people into your meetings, you will need to help Outlook to find them in Exchange Calendar. There is a Global Address List (GAL) that has a list of everyone who has a calendar on the system. You can also invite people to your meeting using only their email address, but in this case you might not be able to see whether they are free or busy.

### 4.2 Inviting People to a Meeting

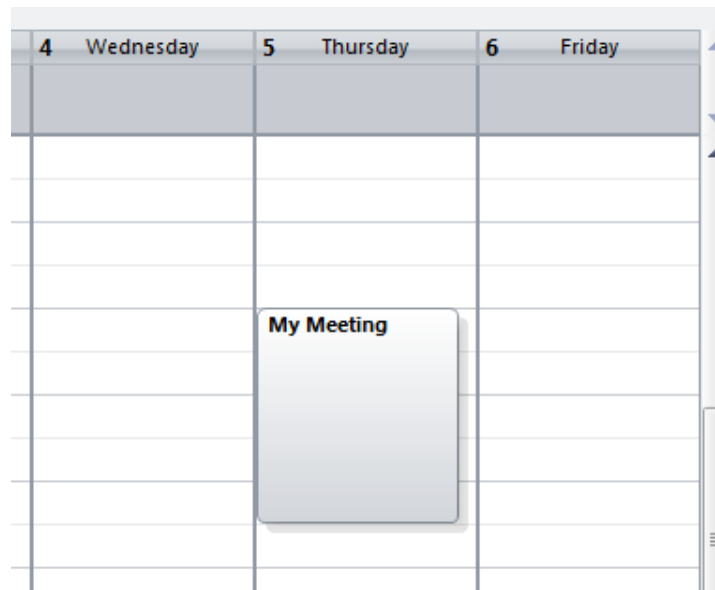
There are several ways to create a meeting and invite people to it. You can create a meeting first, then add the people. Or you can start with a **MEETING INVITATION** that lets you both add people and choose the time. In Microsoft Outlook there is also an interface called **PLAN A MEETING** that lets you pick the people first.

### 4.3 Booking a meeting, time-first

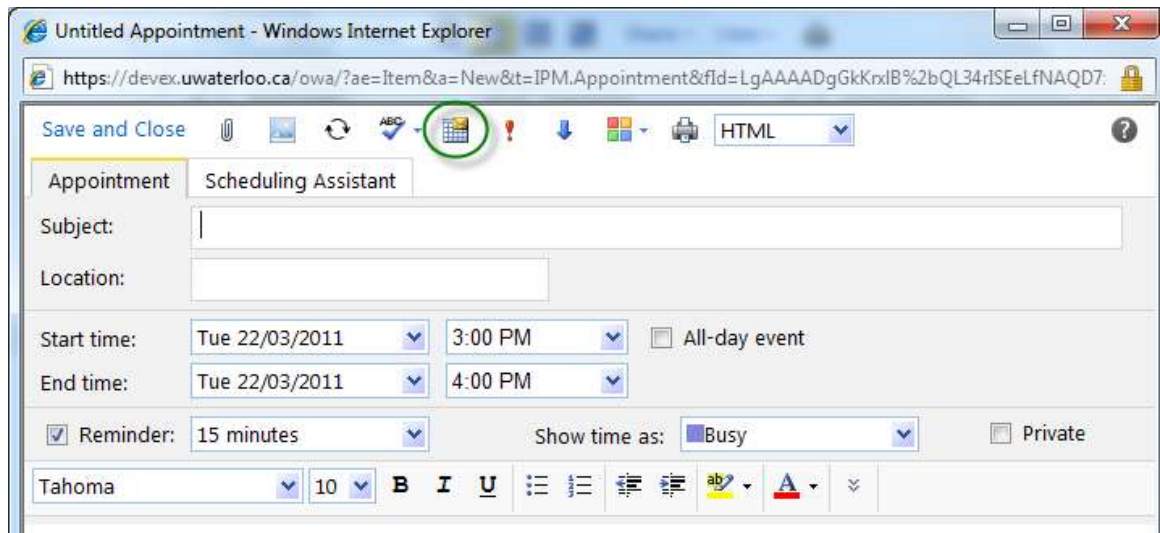
This method works just like a personal appointment. Once we've created the appointment and set a time, we'll invite the attendees.

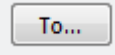
#### Pick a Time, Create a Meeting, then Invite People

1. Create an appointment on a day and time of your choosing, by double-clicking on the start time and setting the duration of the meeting.



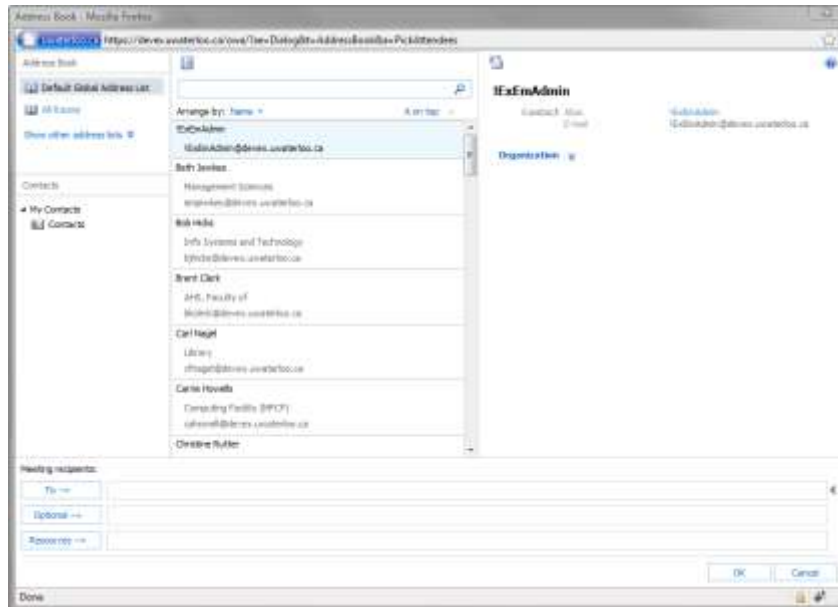
2. In the **APPOINTMENT FORM** click on Invite Attendees.



3. An extra line appears in the form with a button  and an entry field.

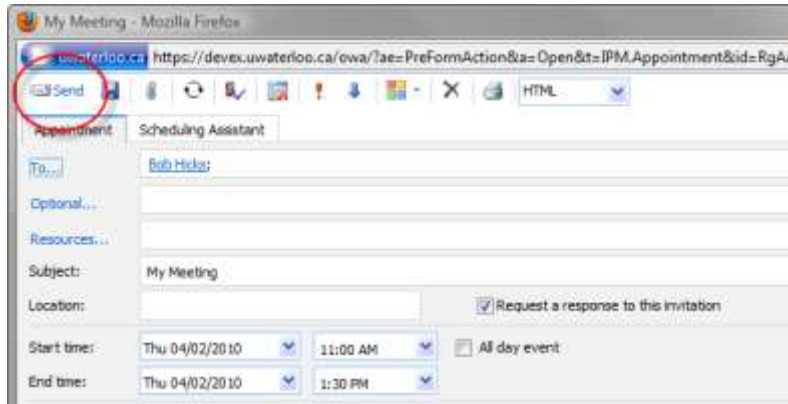
4. Click on the  button.

5. The **ADDRESS BOOK** appears with the **GLOBAL ADDRESS LIST** selected.



6. Look through the names, select one and click on **To** or **REQUIRED** to add them. Alternatively, you can just type their names and names that contain the characters will pop up and you can select the name you want.

7. Click OK.
8. You are returned to the Appointment Form.



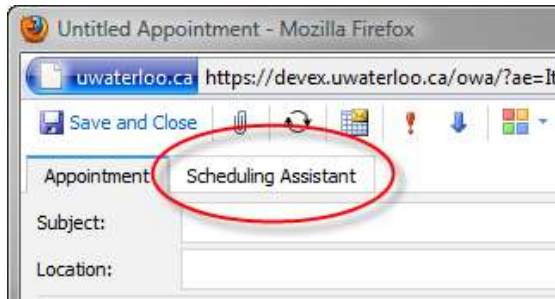
9. Click Send to invite the other attendees to the meeting.

#### 4.4 Using the Scheduling Assistant

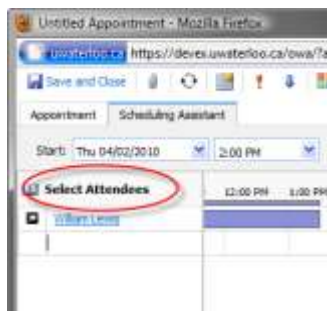
The Scheduling Assistant will help you to find a good time to meet with other people.

#### ❖ Book a Meeting with the Scheduling Assistant

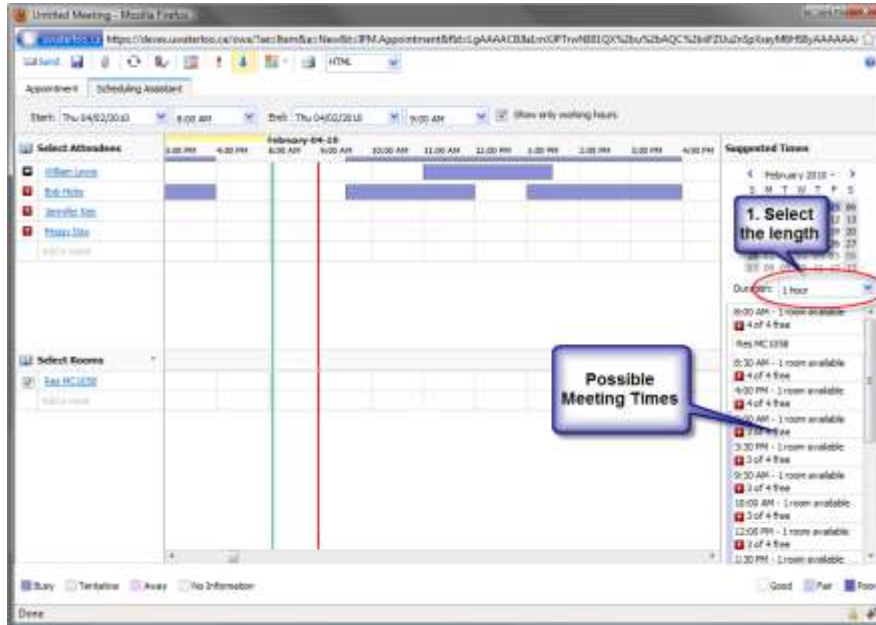
1. Create a new appointment by double-clicking on your calendar. (This will pick a time that is wrong, but we will change it later.)
2. In the Appointment Form, click on Scheduling Assistant



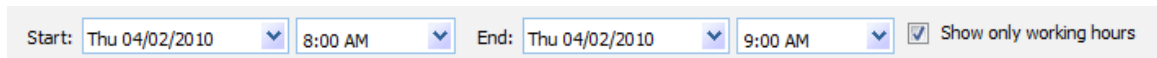
In the Scheduling Assistant, you can enter the names of the attendees, or click on Select Attendees or Add Attendees to select the people you want to schedule.



3. You can also add rooms by clicking on Select Rooms.
4. Select the length of your meeting.
5. You will see suggested meeting times in the list on the right hand side.



6. You can click on a meeting time to scroll the main view, or you can manually use the scroll bars to see different days and times.
7. Once you select a meeting time, it will show up in the Start and End boxes.



8. Once you've found a time, click on Appointment to go back and confirm the details of the meeting.
9. Click Send.

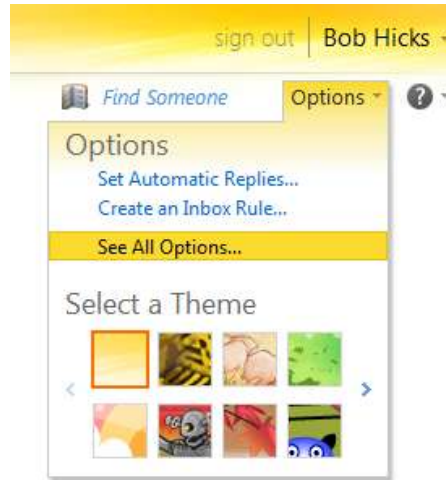
#### 4.5 Set Your Work Hours

The Scheduling Assistant uses your working hours to suggest times for meetings. Update your working days and hours so that other people book you for appropriate times of the day.

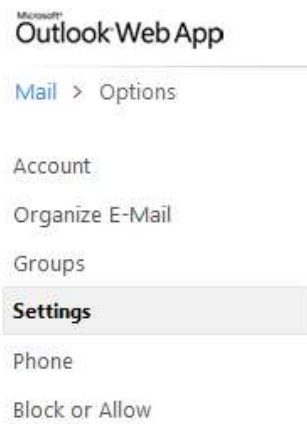
Click on Options:



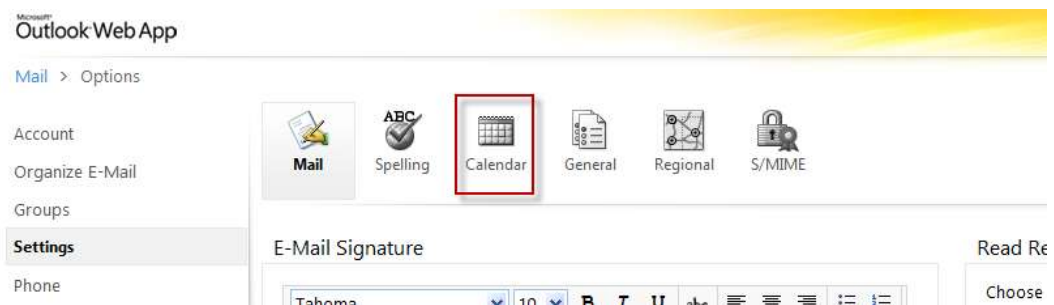
The following will appear:



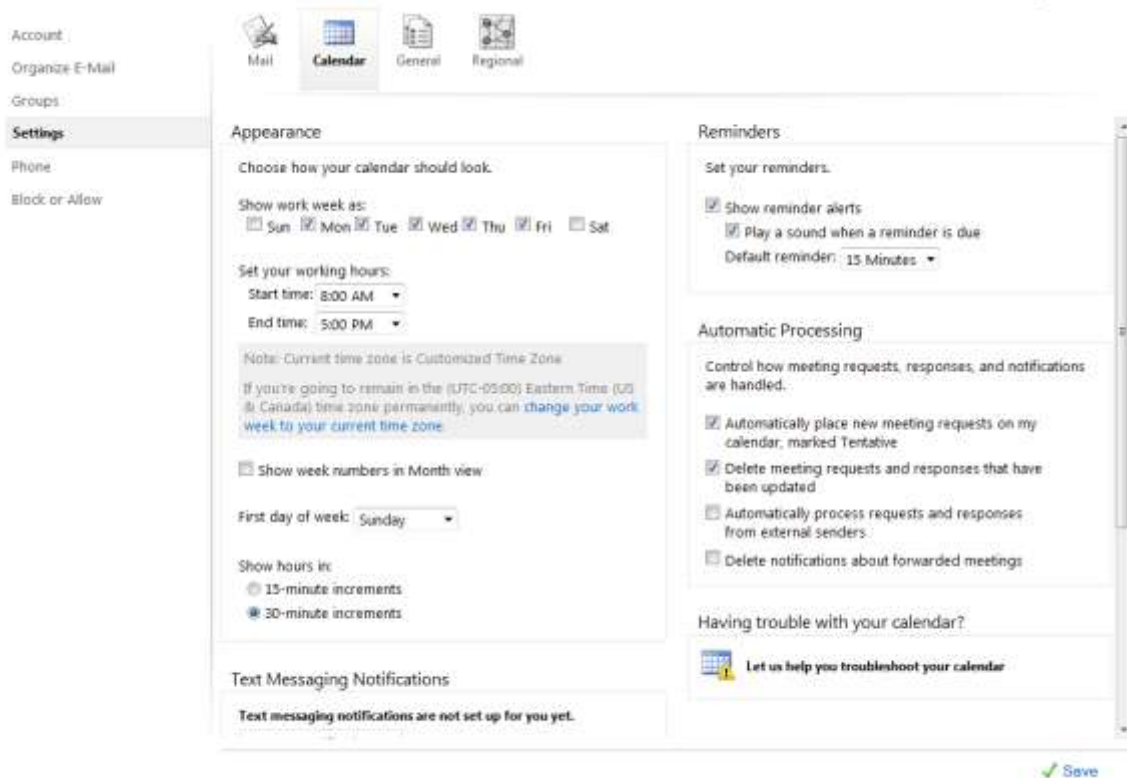
Select Settings, as shown below:



And the following window appears:



Click on “Calendar” and then select the days you work and the start and end of your work day.



Save your changes, then click on “My Mail” in the top right corner. Then you will need to click on “Calendar” to go back to working on your calendar.

#### 4.6 Managing Responses to your Meeting Requests

After you send out a meeting request, the invitees get to respond with Accept, Tentative or Decline. They have the option of sending you an email with their response. If they do not send you the email, there is no method in Exchange Calendar for you to find out whether they are attending.

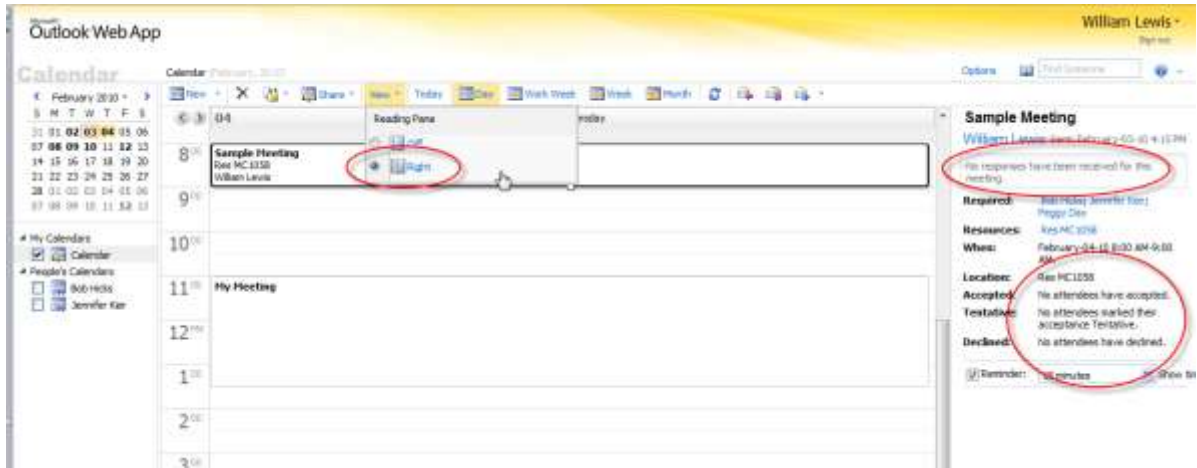
#### 4.7 Updating a Meeting Request

If something about the meeting changes, you can edit the meeting in your calendar. It is then imperative that you choose Send Update to email all of the attendees so that their calendars also get updated.

Otherwise they will have old information about the meeting in their calendars.

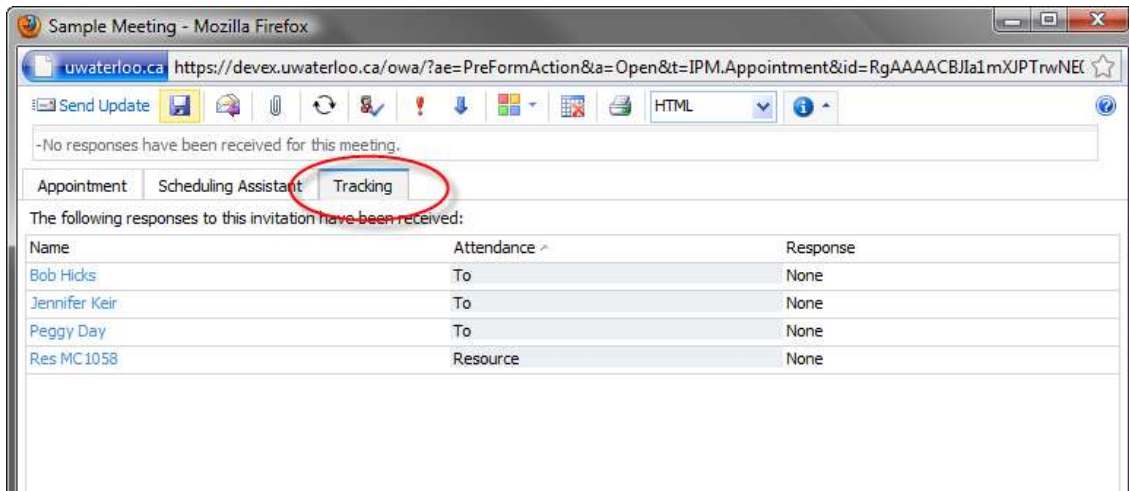
#### 4.8 Checking Attendance at Your Meeting

To see what the responses to your meeting have been, use the Reading Pane, which appears by default in the daily view, but can also be used in the weekly views.



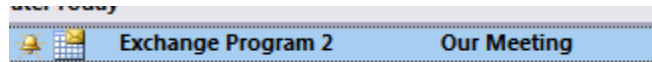
You will see a summary of the response information.

You can also open a meeting and select Tracking to see the individual responses:



## 5 Receiving Meeting Requests

When you are invited to a meeting, you will receive an email, and an entry will appear in your calendar marked **TENTATIVE**. Notice that the meeting invitation shows a miniature calendar symbol, instead of the envelope normally seen on email messages.

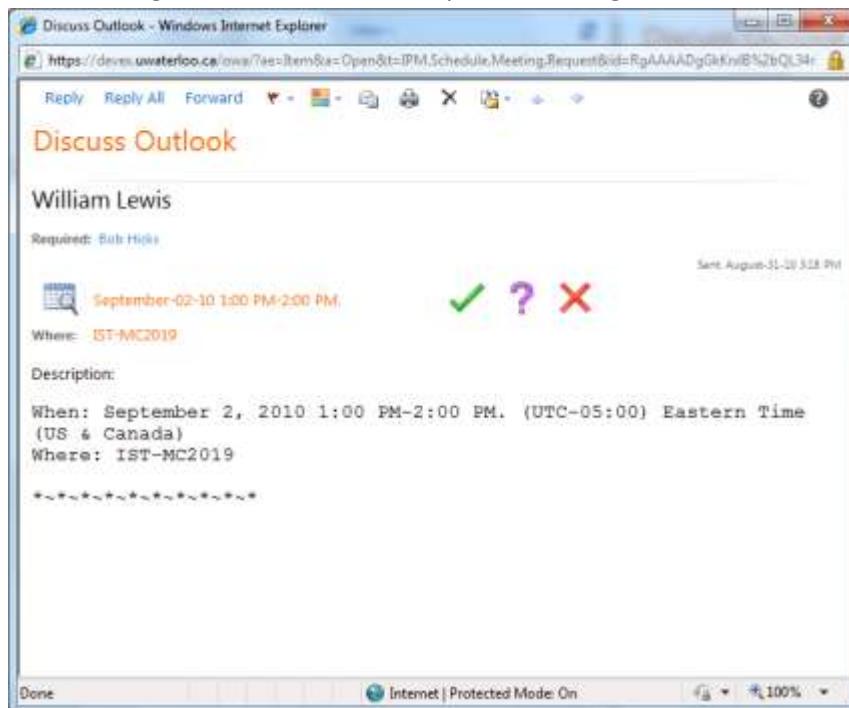


### 5.1 Deal with Meeting Requests when you get them

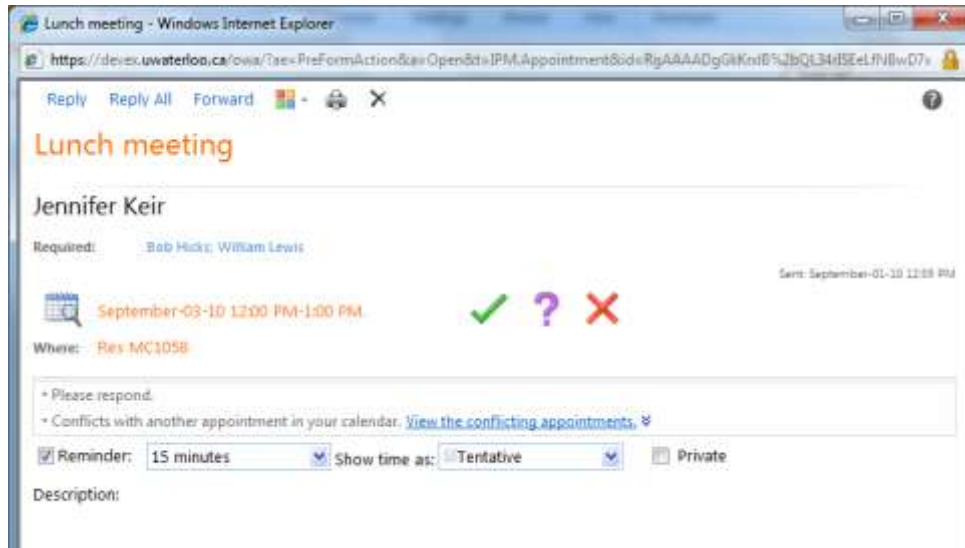
It is a good practice to deal with your meeting requests after you open them, by clicking on **ACCEPT** or **TENTATIVE**. This helps to ensure that the most up to date information is in your calendar, and will help to keep meeting requests from cluttering your inbox.

#### ❖ Accept the Meeting

1. Open the meeting invitation
2. Click on the green checkmark to accept the meeting:



You can also accept the meeting by opening the meeting in your calendar. You will see the same options for responding to the meeting:



## 5.2 Declining a Meeting

In Exchange Calendar, a declined meeting completely disappears from your calendar. This is very different from Bookit, where you were not able to delete a meeting that another person put into your calendar, and you could easily change your status from **NOT ATTENDING** to **ATTENDING**.

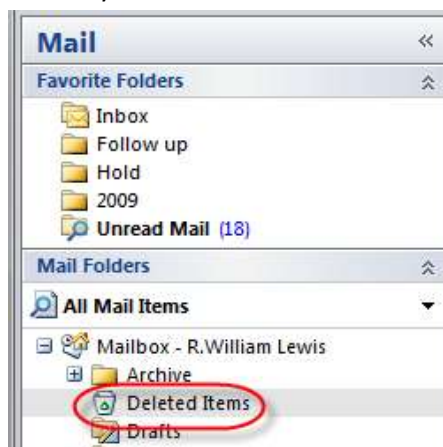
We recommend that you mark meetings as **TENTATIVE** if you need to be aware that they are happening, or if you would like the option of changing your response in the future. We recommend that you only **DECLINE** meetings that you were invited to in error.

## 5.3 Recovering a Declined Meeting

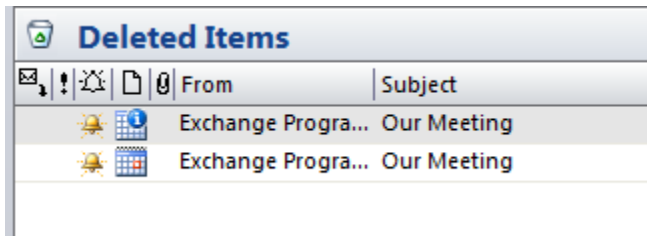
Should you accidentally decline a meeting, you can change your response by opening the meeting invitation in your **DELETED ITEMS** folder.

### ❖ Recover a Meeting

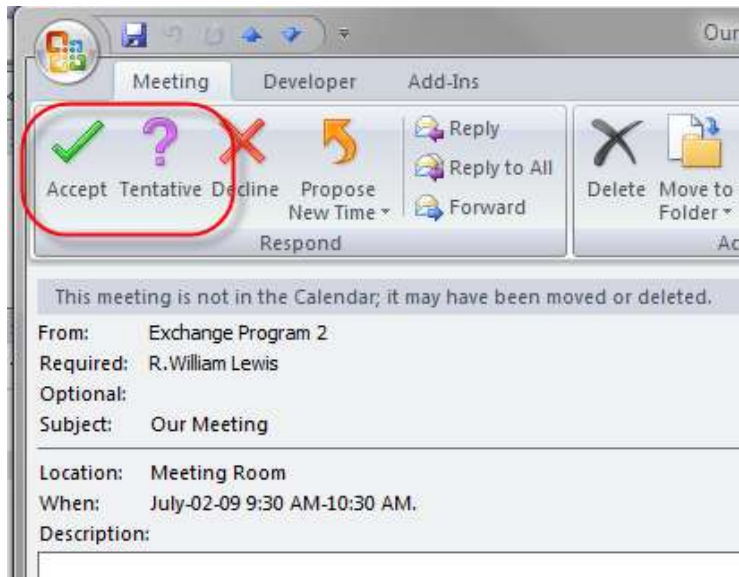
1. Choose your Deleted Items folder:



2. There will be two items in your Deleted Items, a **MEETING REQUEST** from your **INBOX** and a **MEETING** from your **CALENDAR**. Double-click on the **MEETING REQUEST**. Be sure to pick the most recent one so that you have accurate information about the meeting.



3. You can now respond with **ACCEPT** or **TENTATIVE**.



4. Each action you take sends an email to the meeting organizer. Fortunately, the meeting organizer's Outlook will automatically delete any out of date responses that you have sent, so they will probably not see your initial rejection of the meeting.

## 6 Opening Shared Calendars for People and Resources

In OWA, you can open other people's calendars as well as calendars for resources to see when they are free. A resource could be a meeting room, a classroom, a laptop, a projection pad, or anything that you need to book out. A resource like a meeting room could be set up so that only one person can book it (and others can look at the schedule), a group of people can book it, or everyone can book it.

### ❖ Open a Shared Calendar

1. Click on "Add Calendar..."

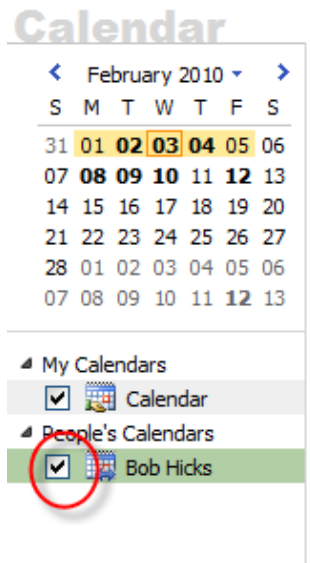


2. You can enter a Name, or click on Name to access the Global Address List:

A screenshot of the 'Add Calendar' dialog box. The title bar says 'Add Calendar' with a close button (X). The main text reads: 'You can add a calendar from your organization or from the Internet.' There are two radio button options: 'Calendar from your organization' (which is selected) and 'Calendar from the Internet'. Under the first option, there is a 'Name...' label and a text input field. Below the input field is the example '(Example: Tony Smith)'. Under the second option, there is a 'Calendar URL:' label and a text input field. Below the input field is the example '(Example: webcal://contoso/soccer.ics)'. At the bottom right are 'OK' and 'Cancel' buttons.

3. By default the calendars open side-by-side. You can change the view to Day, Work Week, Week or Month.
4. You now will see the shared calendar in your list of calendars for future use. Turn display on or off with the checkbox, click the "X" beside the name William Lewis X. You can turn off display of your own calendar if you need more room to see the shared

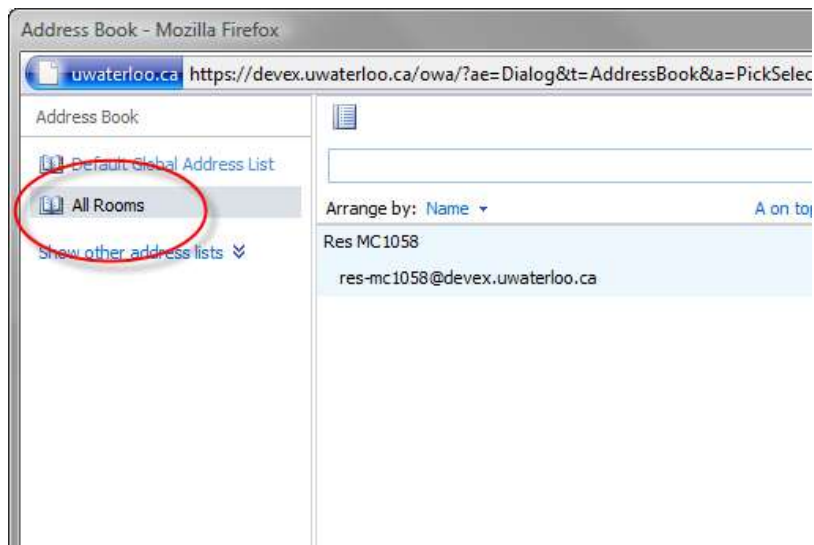
calendar.



5. Right click on a name and choose Open in New Window to see the calendar..

## ❖ Open a Room Calendar

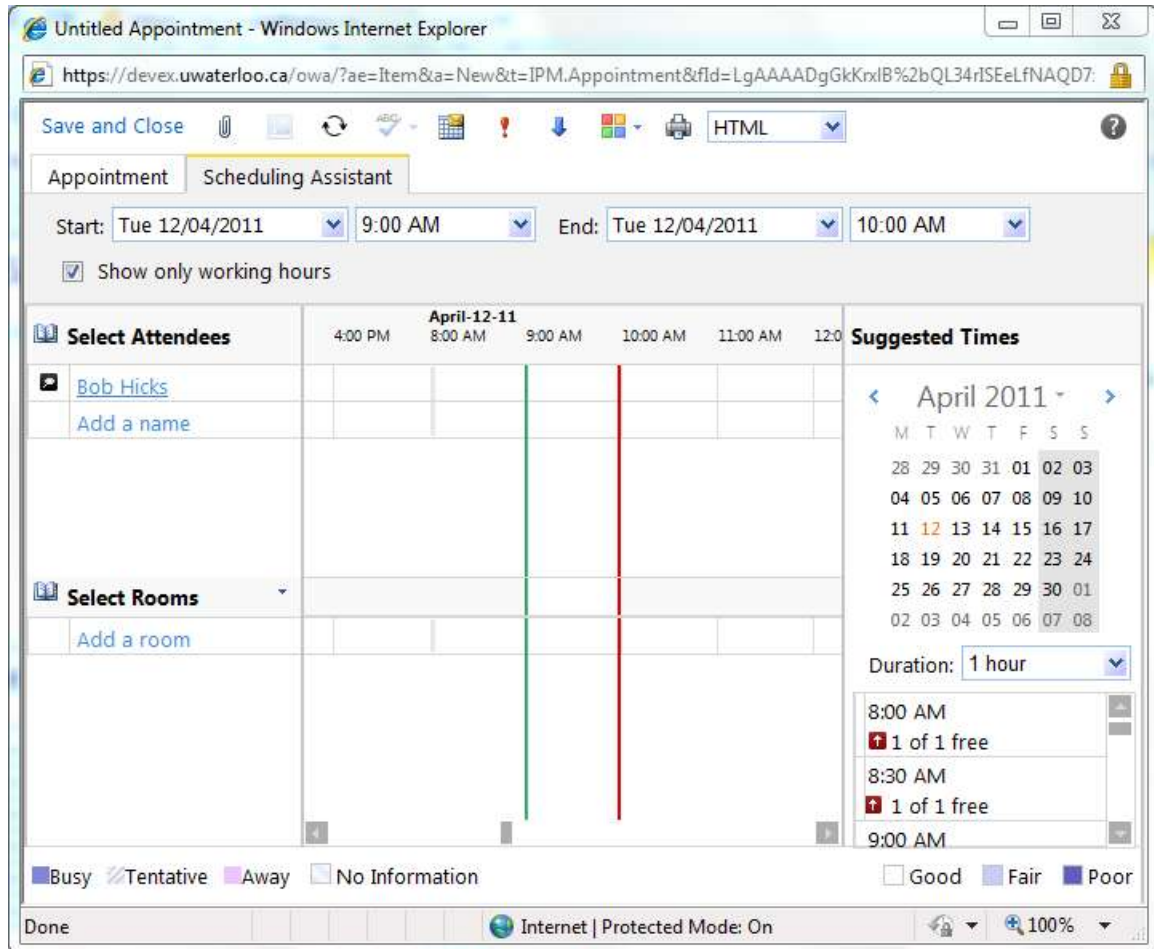
1. Click on Share, then select "Add Calendar...".
2. Click on Name to access the Global Address List:
3. Click on All Rooms



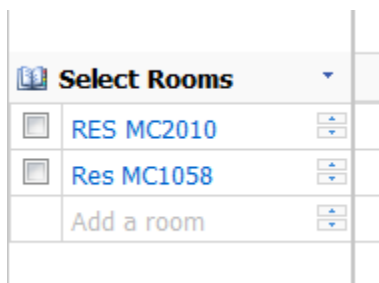
4. Double-click the room you would like from the list.
5. Click on OK in the Address List, then click OK in the Open a Shared Calendar window.

## ❖ Book a Resource

1. To create an appointment with a Meeting Room attached, start by creating your meeting and select “Scheduling Assistant”.



2. Click on “Select Rooms”. You have the option of selecting recent rooms and all rooms that you have permission to schedule.

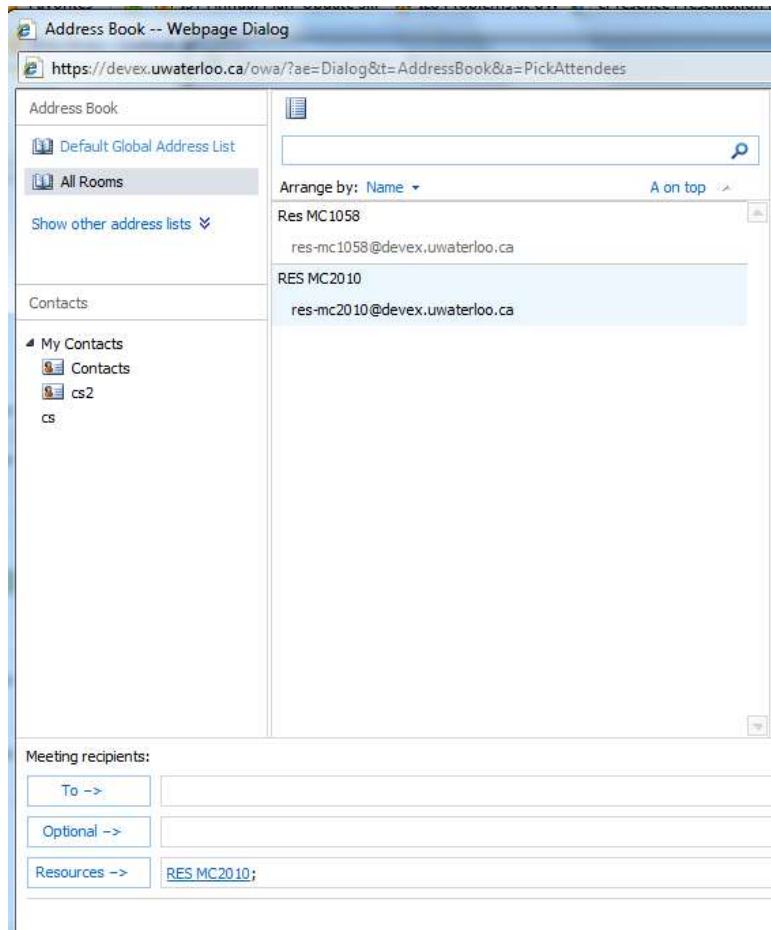


3. Select the checkbox beside the room you want to book.
4. Click Send.

5. The room will be displayed with the appointment in your calendar...



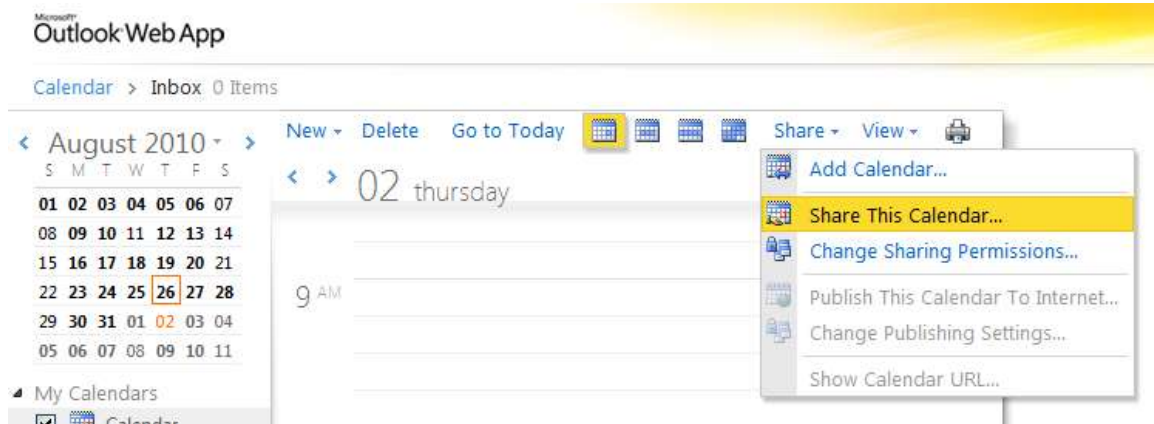
6. You can also add rooms from the Global Address List while adding attendees. They should go under Resources.



7. Wait for a response from the room to ensure that the meeting has been accepted. Some rooms will accept automatically when free, others will decline meetings from unauthorized people, and others will require approval from a Resource Delegate.
8. If the room declines your meeting, you must remove the room from the meeting, update the location field and send an update to all the invitees.

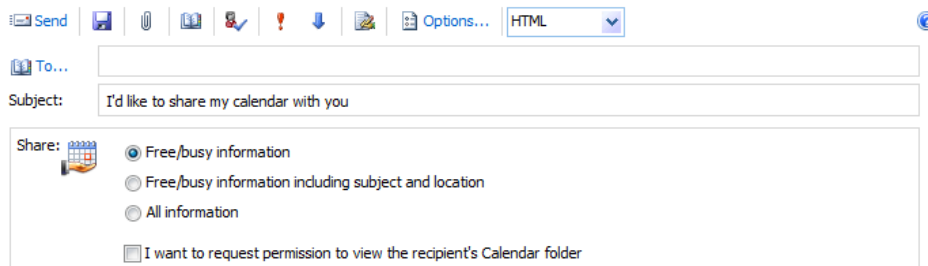
## 6.1 Sharing Your Calendar


By default, other people will be able to see whether your time is marked as free or busy, but they will not be able to see any details of your appointments and meetings. For most, this would be the preferred option. You can provide increased access to your calendar if your colleagues need to know the subject of your meetings, or all of the details of your meetings. For most people OWA provides a friendlier interface to these settings than Microsoft Outlook.

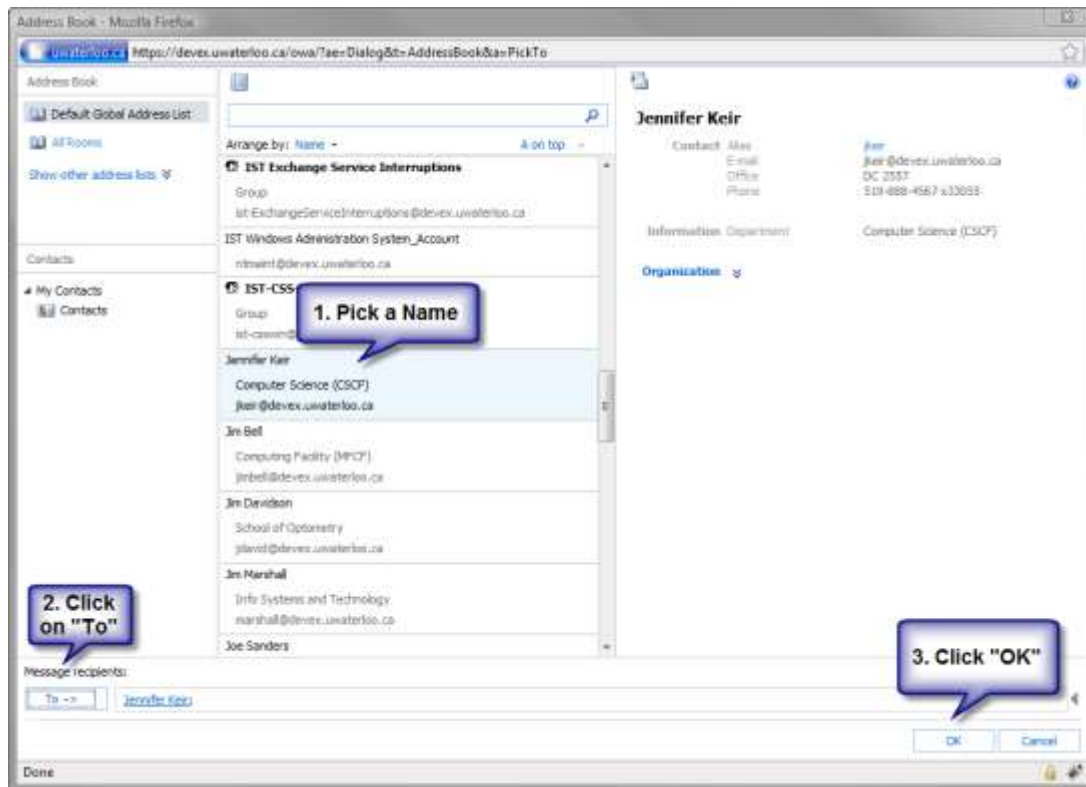


Click on “Share This Calendar”.

You are now composing an email which will give permissions to people. Choose whether you would like to give access only to subject and location, or to allow access to all information.



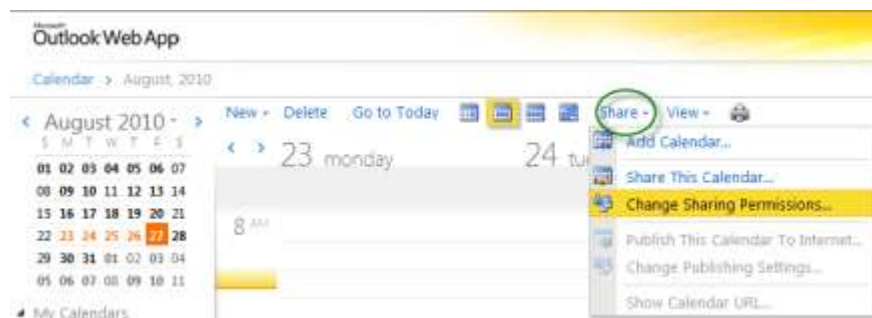
You can simply enter the userid of the person you wish to share your calendar. Or, click on the  **To...** button and select the person or persons you need to give access to.



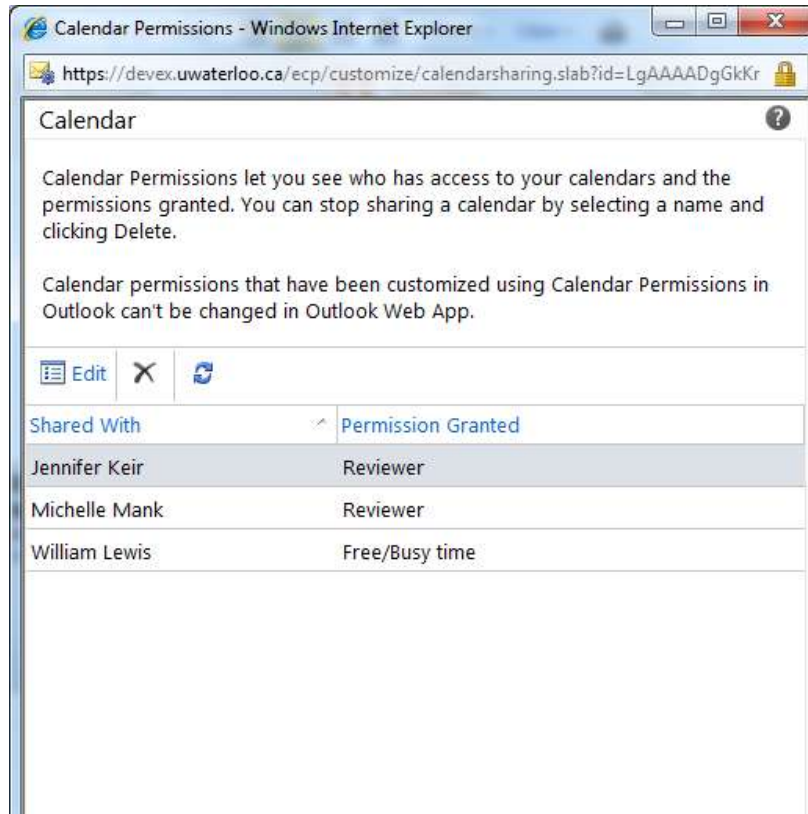
You are returned to the email. Click on Send to finish.

## 6.2 Monitoring Access to Your Calendar

Click on Share, then “Change Sharing Permissions...”



You will see the list of people who have access to your calendar:



Those marked as “Reviewer” can see everything in your calendar. Those marked as “Free/Busy time”, can see when you are busy but not what you are doing. You can remove permissions by selecting a name and clicking delete.



## 7.1 Advising Colleagues of your vacation

In order to display your vacation time in your colleagues' calendars, you will need to create a separate booking and invite them to it. The new booking will show time as Free, since your colleagues are presumably not joining you on your travels.

### ❖ Add your vacation information to others' calendars

1. Create a new all-day event by double clicking below an existing vacation entry.
2. In this booking, Show Time as Free and click on Invite Attendees.
3. Click on To and select any other people you would like to inform about your vacation.
4. You can probably deselect "Request a response to this invitation".

The screenshot shows a web browser window titled "Untitled Meeting - Windows Internet Explorer". The address bar contains the URL: <https://connect.uwaterloo.ca/owa/?ae=Item&a=New&t=IPM.Appointment&fid=LgAAAADG2D2ZXxRkQ40woHeOOxyCAf>. The browser's toolbar includes icons for Send, Print, Refresh, Undo, Redo, and a dropdown menu set to "HTML".

The main content area is a form titled "Appointment" with a sub-tab "Scheduling Assistant". The form fields are as follows:

- To...**: William Lewis; Jennifer Keir;
- Optional...**: (Empty)
- Resources...**: (Empty)
- Subject:**: (Empty)
- Location:**: (Empty)
- Request a response to this invitation
- Start time:** Fri 10/12/2010
- All-day event
- End time:** Fri 10/12/2010
- Reminder: 15 minutes
- Show time as:** Free
- Private

Below the form is a rich text editor with a font face of "Tahoma", a font size of "10", and standard text formatting icons (Bold, Italic, Underline, Bulleted List, Numbered List, Indent, Outdent, Undo, Redo). The status bar at the bottom of the browser shows "Internet | Protected Mode: On" and a zoom level of "100%".

5. When you are done, click Send.

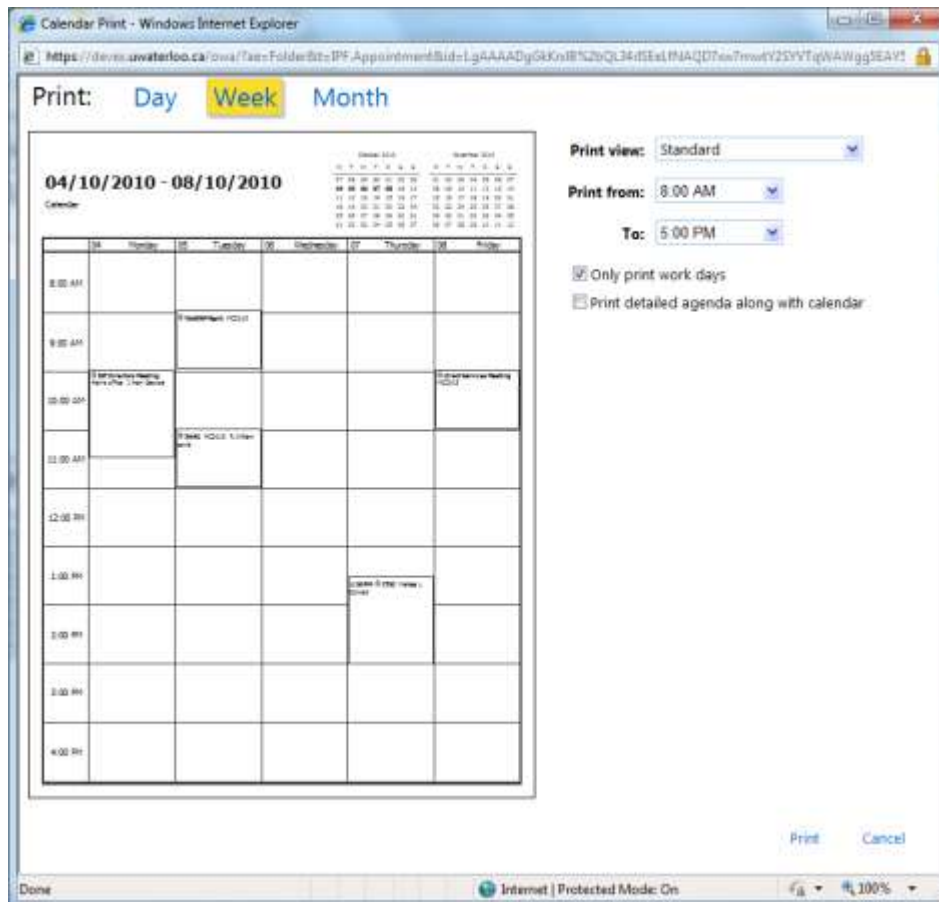
## 8 Printing Your Calendar

There may be times when you want to print your calendar. For example, you may want to print your weekly calendar to post on your door. You may want to post a room calendar on a door. And you may want a copy of your weekly or monthly calendar if you are going to be in a location where there is no internet access.

1. Select the printer icon, shown below:



2. The following window will open:



3. Select the view (Day, Week, Month), the times, and select "Print".