Appointments, Meetings & Events User Guide

The webmail Appointments, Meetings & Events feature is available to help you create single or recurring appointments, meetings and events. While creating an appointment you can see if attendees are free before inviting them, reserve a room and equipment, and write a message that is sent with the invite.

Regarding the scheduling of equipment, please note that Administrators set up equipment accounts and configure the equipment's scheduling policy. When you set up a meeting and schedule equipment for use in the meeting, you select the equipment and "invite" it to the meeting. A meeting can be declined if the equipment already has a meeting scheduled for that time. In some cases, an equipment scheduling policy is set up to allow the equipment to accept dates in recurring meetings even if there are conflicts. You receive an email showing which dates conflict.

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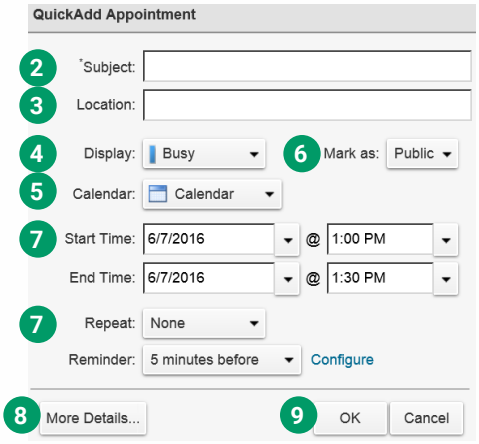
How to Create an Appointment Quickly

The **QuickAdd** option makes it easy to quickly create an appointment for yourself. If you would prefer to always open the Appointment page when you double-click or drag on the calendar, disable this feature from your **Calendar Preferences**.

1 Right-click on either the mini-calendar or the start time in one of your calendar views. You can select to create a **New Appointment** or a **New All Day Appointment**.



2 In the **Subject** text box, add a brief description of the meeting. The text added here becomes the description in the calendar.

3 In the **Location** text box enter where the meeting is to be held. If the location is in a directory, when you start to type, locations that match are listed.

4 In the **Display** drop-down menu, select the **Free / Busy** option for this appointment.

5 If this appointment should be added to a calendar other than the default **Calendar**, select the calendar.

6 In the **Mark As** drop-down select whether the appointment is **Private** or **Public**.

- Details about events that are marked private do not display in a grantee's shared calendar. Only the start and end time, duration, recurrence information, and the organizer's identity are shown in the shared calendar.

7 Define the start and end day and time. If the appointment is recurring, in **Repeat**, select how often this appointment should be scheduled.

8 (Optional) If you want to add other attendees, schedule a resource, or add notes to the appointment, click **More Details**.

9 Click **OK**.

Please note: the QuickAdd feature is an option.

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How to Create a Meeting from the Appointment Page

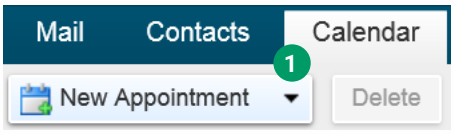
You can create an appointment from the **Calendar** tab.

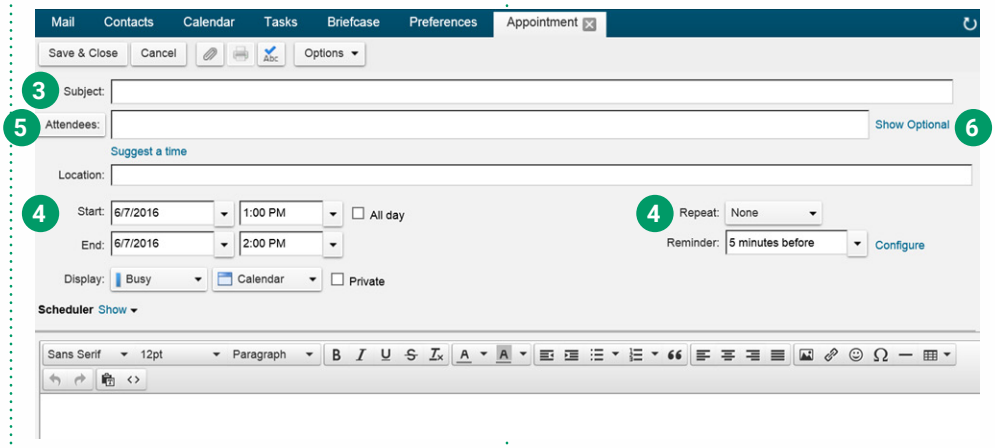
1 On the **Calendar** tab, click **New Appointment**.

2 If the **From** field displays above the **Subject** line, you created more than one persona for your account. Select the identity to use when creating this appointment.

3 In the **Subject** text box, add a brief description of the meeting. The text added here becomes the description in the calendar.

4 Define the start and end day and time. If the appointment is recurring, in **Repeat**, select how often this appointment should be scheduled. Select **All day event** to make this appointment all day.





5 In the **Attendees** text box, type the email addresses, separate addresses by a semicolon (;). As you enter names, the **Scheduler** opens and the attendee's free / busy information is displayed. To help you find a time when all attendees are available, click **Suggest Time**. A calendar displays with the availability. As you enter attendee names, the scheduling tool begins to suggest times that all the attendees are available.

Please note: If an attendee has set a preference to allow only certain users to see free / busy information and you are excluded from the list, you cannot view the free / busy schedule.

6 If some attendees are not required to be at the meeting, but you want to invite them, select **Show Optional** and type the email address in the field. You can also do this in the Scheduler. Click the icon next to the name and select **Optional Attendee**. When the invite is sent, their names are listed as optional.

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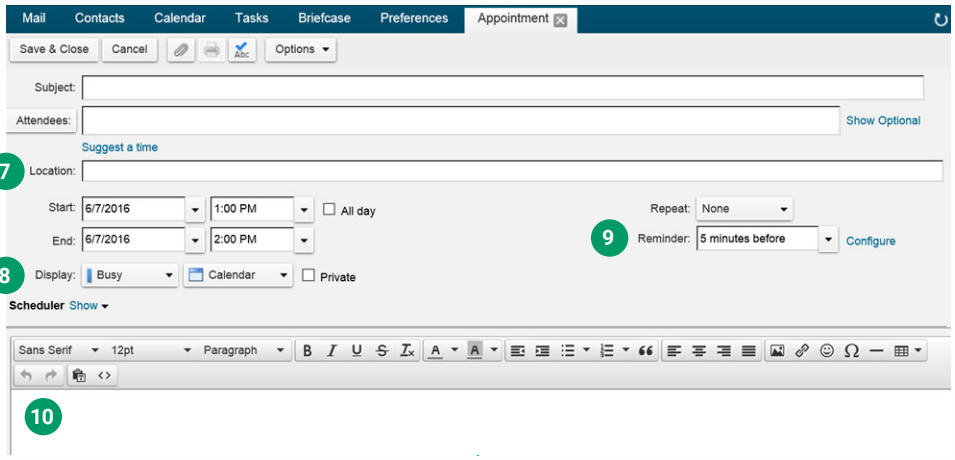
How to Create a Meeting from the Appointment Page (cont.)

7 In the **Location** text box enter where the meeting is. If the location is in the directory, when you begin to type, locations that match are listed.

8 In the **Display**, select the **Free / Busy** option for this appointment, which calendar the appointment should be added to, and whether this appointment should be marked as Private.

9 In the **Reminder** drop-down menu, set an alarm notification to remind invitees of the appointment. If you have configured an email address or SMS alert in your **Preferences > Notification** page, check the appropriate box, Email or SMS. If you have not configured a notification, click **Configure** to go to the **Preferences > Notification** page to set this up.



Please note: Notifications cannot be set on a per-entry basis. This means that whatever settings are in your **Preferences > Notifications**, they will be used for all your notifications, and not only for this particular calendar event or task.

10 In the text box below **Scheduler**, type an email message that is included in the appointment invitation. To add attachments, click the paperclip icon on the toolbar.

11 The default is to ask the attendees to reply to your invitation. If you do not want a response from the attendees, in the **Calendar** toolbar, click **Options > Request Response** to remove the checkmark.

12 If you do not want to send the invite out at this time, click **Save**. Otherwise click **Send**.

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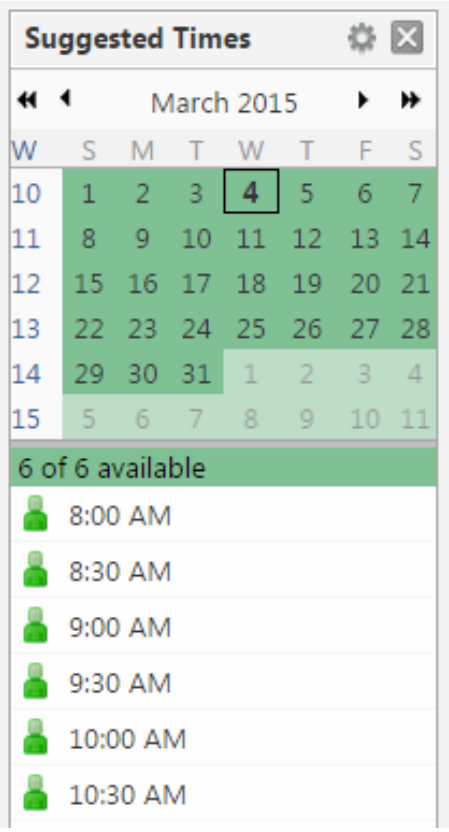
How to Use the Scheduling Tool to Find Attendee Availability

When you schedule meetings, you can check to see when attendees are busy or free so you can find a good time for all attendees to meet. As you add attendees to the **Attendees** field, a suggestion panel in the overview pane shows availability in 30 minute time slots for the attendees. The default time preference is to suggest time within your working hours and within the attendee's working hours.

1 You can change this if necessary. In the **New Appointment** page, click **Suggest** a time. In the **Suggest Times** pane that opens, click the gear icon . Uncheck the boxes you do not want used to calculate attendee availability.

2 View **Availability in the Mini-Calendar** which suggests attendee availability by color code.

- Green represents the days that all attendees and at least one location is available.
- Orange means that not everyone can attend but more than half can, and at least one location is available. You can hover the cursor over the date to see the names of up to 10 people who are not available.
- Red means more than half of the attendees cannot attend the meeting on those days.



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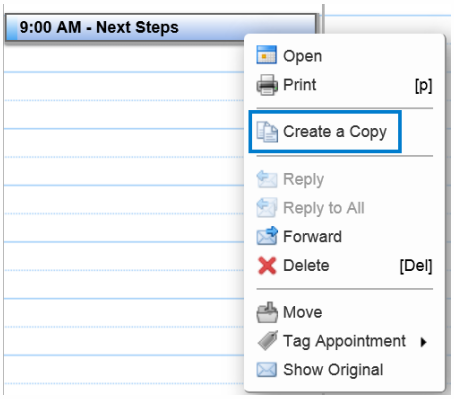
How to Create an Appointment from an Existing Appointment

You can create an appointment similar to an existing appointment and the existing attendees, location, notes and recurrent pattern can be quickly set up for new dates and times. You can also modify any of the information before sending the invite.

1 Right-click on the appointment to copy and select **Create a Copy**. The appointment compose page opens with all the information of the copied meeting added to the appointment page.



2 To create an copied appointment on another date, you only need to change the start and end date for this appointment.

3 Make any other changes to attendees, location, text, etc.

4 Click **Send** and an invite is sent to attendees and the appointment is added to your calendar.

How to Use Email Messages to Set Up Meetings

You can quickly create a meeting request by dragging and dropping a message or conversation to a date on the mini-calendar. When you drag and drop a message or conversation, the information in the message is used to populate many of the fields on the **Appointment** page.

1 Click a specific message or conversation and drag it to a date on the mini-calendar.

2 The **Add Attendees** dialog opens the appointment page with many of the fields populated from information in the message. The Subject of the appointment is the subject of the message. The attendees are all the email addresses in the **To:** and **Cc:** fields of the message, or the most recent message in conversations. When you drag a contact from your contacts lists onto the mini-calendar, the contact's first email address is added to the attendee field. The text of the message becomes the text of the invitation. Message attachments are not attached to the appointment request.

3 On the **appointment** page, review the meeting request details and make any necessary changes.

4 **Set the time** for the meeting. If this meeting recurs, set any recurrence.

5 Click **Send**.

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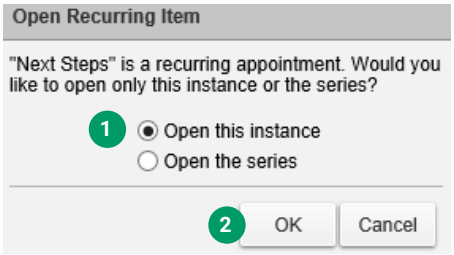
How to Change an Appointment or Meeting

You can change meeting or appointment information. If you created a recurring meeting, you can change one occurrence or the series of the meetings. Also, you can select to send or not send an email to attendees to update the meeting details.

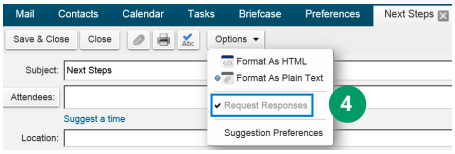
1 Double-click on the meeting that you want to change. If the meeting is recurring, the **Open Recurring Item** dialog opens. You can change either a single instance of a recurring meeting or the entire series.



2 Click **OK** to open the **Appointment** page.

3 Change any information necessary.

4 The default is to ask the attendees to reply to your invitation. If you do not want a response from the attendees, in the Calendar toolbar, click **Options > Request Responses** to remove the checkmark.



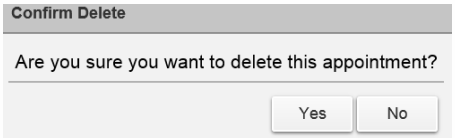
5 Click **Send** to send the revised meeting details to the attendees.

How to Cancel a Meeting

If you created a meeting, you can cancel it. If you created a recurring meeting, you can delete one occurrence or the entire series. An email is sent to attendees to inform them of the cancelled meeting. Deleting a meeting is permanent; you cannot undo the deletion.

Please note: Only the originator of an appointment can cancel the appointment. Attendees can remove the appointment from their own calendars, but they cannot cancel the entire appointment.

1 In the calendar view, right-click the meeting and select **Delete**.



2 A confirmation box appears. Select **Yes** to confirm.