



QUICK REFERENCE GUIDE

MS Outlook Calendar Management Guide (v1)

Last Updated: 29 January 2024

Compiled by: IT – Run the Bank

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1 INTRODUCTION

Calendar management is essential for maintaining productivity, optimising time management, collaboration, and effective communication among employees.

The purpose of this guide is to provide step by step instructions to manage one's calendar. For more information on Barko's policy and employee responsibilities regarding calendar management, refer to the *Calendar Management Policy*.

2 COMPANY CALENDAR TOOLS

- Microsoft Outlook is the approved calendar software for use in Barko as all employees have access to it and it is user-friendly.



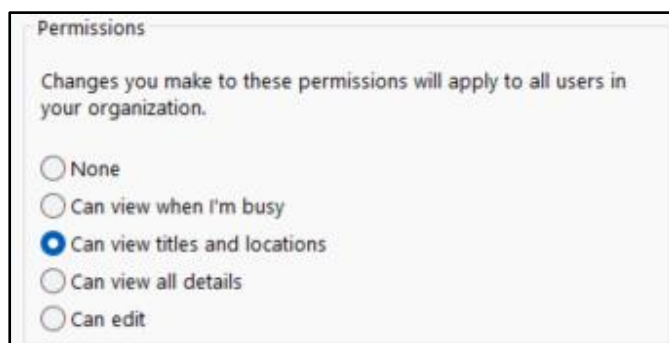
- Microsoft Teams is the only approved meetings or collaborations software as it is included in the Microsoft Office Suite, it is deemed safe and compliant with security and data protection requirements.



3 ACCESS AND PERMISSIONS

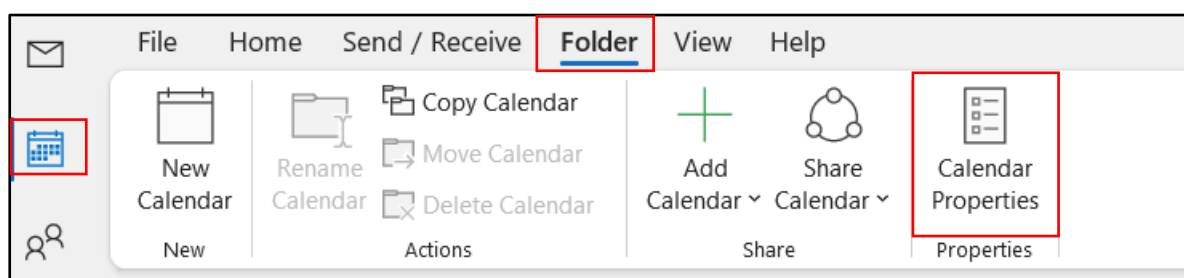
3.1 Overview of Permissions

- There are different calendar permissions that allow you to organise and choose who gets to see what.
 - None: No one gets to see any of your events in your calendar.
 - Can view when I'm busy: This will show the next user that you are just busy from what time until what time.
 - Can view titles and locations: This option allows you to see the title of their entries on the calendar and where they will be at that time.
 - Can view all details: This option shows you all the details about that event; where, when, who and what of that event.
 - Can edit: This means that the person you shared the calendar with can edit or delete your events in your calendar.

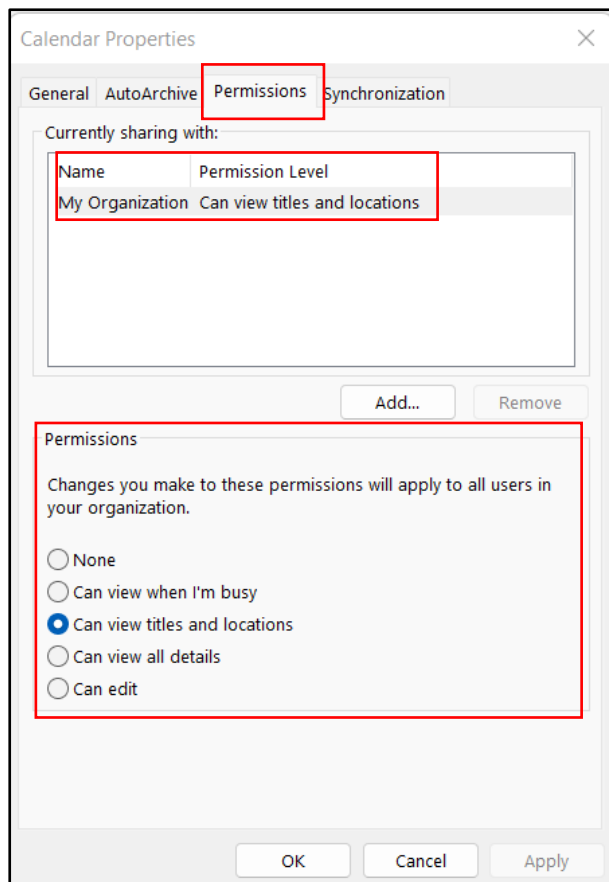


3.2 Where to Access Sharing Permissions

- On your MS Outlook, click on the “Calendar” Icon then the “Folder” tab.



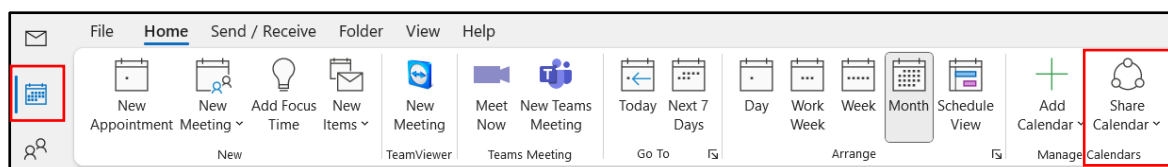
- Open Calendar Properties, this is where you get to set permissions for specific people that you will share your calendar with.
- Navigate to the “Permissions” tab.
- Recommendation would be to use the “view titles and locations” rather than “view all details”.



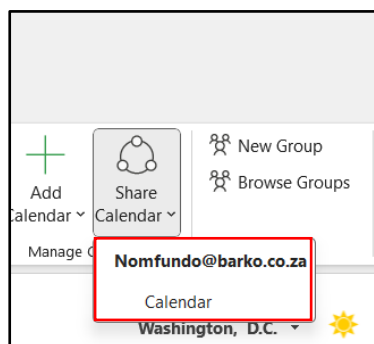
3.3 Sharing Calendars

How to share calendars with colleagues and teams

- Open Outlook then click on the “Calendar Icon” to the left.
- On the Home tab under the calendar options, navigate to the “Share Calendar” tab.



- Click the drop-down option and open your main calendar.



- Click on “Calendar” under the “Share Calendar” tab. This will open the Calendar properties where you choose who you share the calendar with and what permissions they should have.
- Click on “Add...”
- Type name in search box and press “Enter”.
- Select the name of the employee you want to share with.

Add Users

Search: ☒ All columns ☐ Name only

Address Book: [Advanced Find](#)

Name	Title	Business Phone	Location	Department	Em
16 Marine Drive					
2022					
🔍 Aatifa Moti	CREDIT INSURANCE AD...		HQ	HEAD OFFICE	
🔍 Absa					
🔍 ABSA Payments					
🔍 Accounts@barko.co.za (Sha...					
🔍 Acornhoek 1			Acornhoek 1	Acornhoek 1	
🔍 Acornhoek 2					
🔍 AD SYNC SERVICE					
🔍 administrator@barko.co.za					
🔍 Admin-Notifications					
🔍 AD-Notifications					
🔍 afrihost@barko.co.za					
🔍 Alberton 1					
🔍 Alexandra 1					
🔍 All Company					
🔍 Alta Booyse	Senior Bookkeeper		HQ	Head Office	

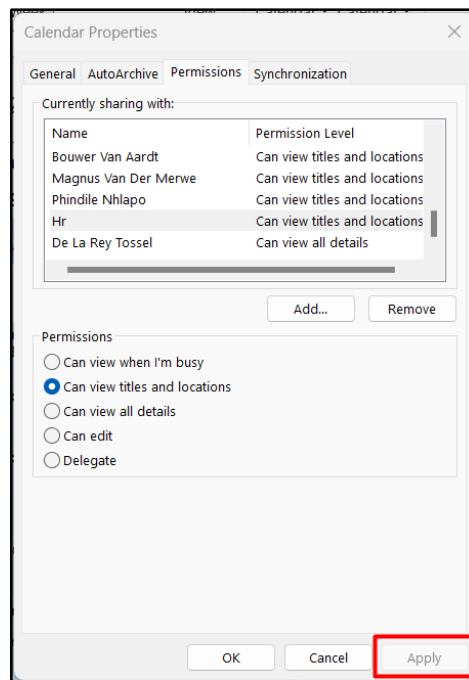
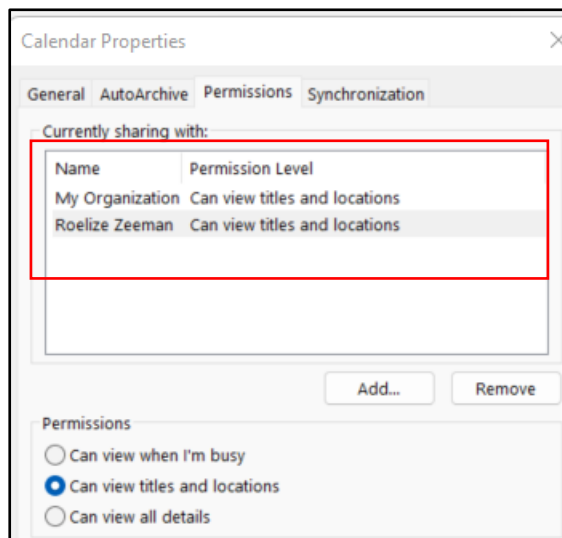
- Click “OK” and “Apply”.

Add Users

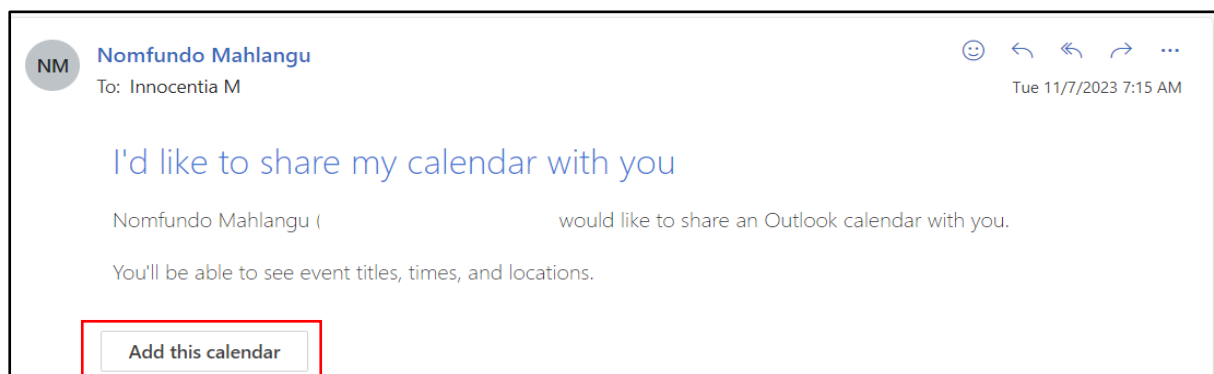
Search: ☒ All columns ☐ Name only

Address Book: [Advanced Find](#)

Name	Title	Business Phone	Location	Department	Em
🔍 Nomfundo Mahlangu	ACTIVE DIRECTORY AD...	0132351030	ZZIT	IT	



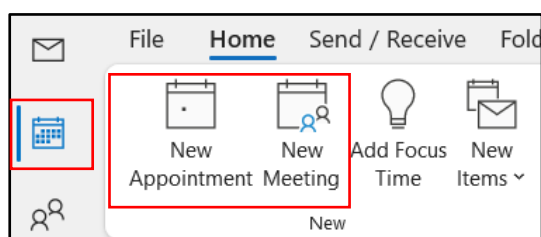
- The person you have shared your calendar with will receive an email to notify them about the calendar, they will then click on “Add this calendar” to add it to their MS Outlook Calendar.



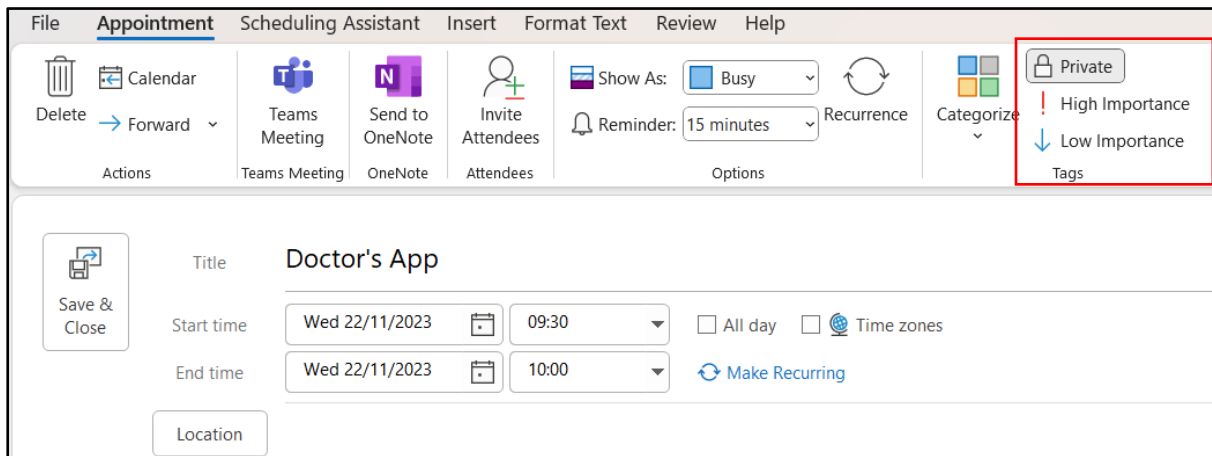
4 PRIVACY AND CONFIDENTIALITY

4.1 Scheduling Private Meetings by using “Tags”

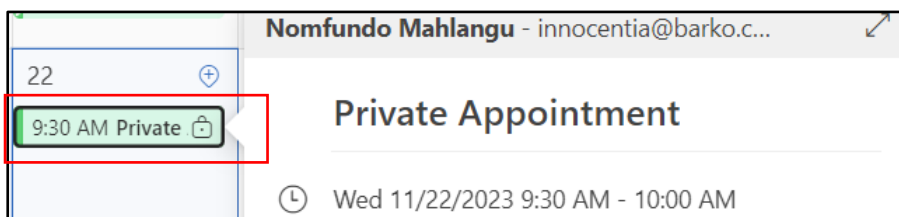
- Private: This is to set your event as private so that no one else can see the details of that specific event, for example, a doctor’s appointment.
- On your Outlook calendar, click on “new meeting or new appointment”.



- Edit in your appointment details, such as the start and end date/times, title and location.
- Select the “Private” option under the “Tags” group.



- Save and close the appointment's page. Anyone that has permission to view your calendar will see the below screenshot on their side.



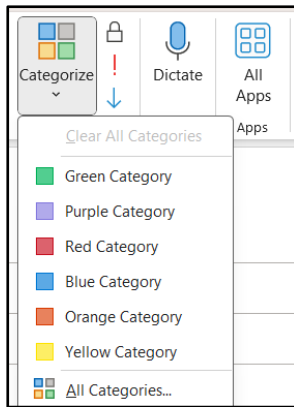
- Only you will be able to see the private appointment's details. The same applies when setting up a private meeting.

5 BASIC CALENDAR FUNCTIONS

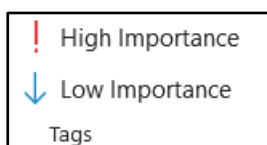
5.1 Categorising and Prioritising using “Tags”

When creating an event on your calendar you have these important settings under the “Tags” group.

- Categorise: You can categorise events according to your colour choices to differentiate and prioritise the events.
- Categories can be named and matched to a colour according to your preference.
- No one else will see these tags or colours, it is for individual calendar management.

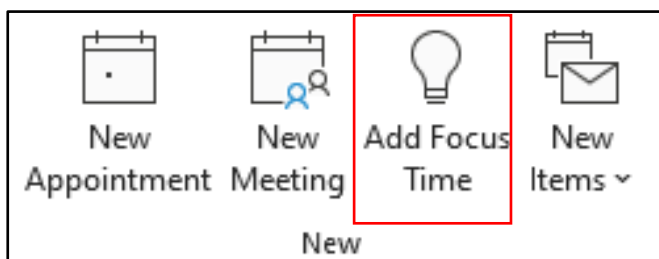


- High/Low Importance: This is to let your attendees know if they need to prioritise your event or not.



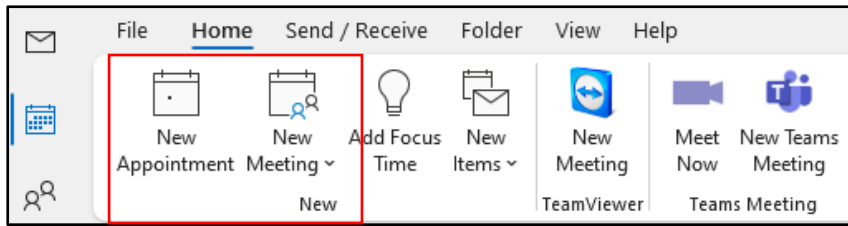
5.2 Blocking Time for Work

- Under the “Home” tab, there’s a group called “New”. There is an option called “Add Focus Time”. This is when you have certain tasks to finish, and you just want to focus on those tasks.
- This option automatically blocks notifications on your device while on the “Focus Time” mode.



5.3 Create, Edit and Delete Calendar Events and Appointments

- How to create a calendar event:
 - On your calendar’s home tab, you will find a group called “New”. This is where you will find the different events and appointments that you can use.
 - Click on “New Appointment” or “New Meeting”, it should show you the same window when you click on either one.
 - Fill in the necessary spots with the required information, remember to also select a location for your attendees to know where you are hosting this event.
 - Also remember to categorise your event, set it to private and to indicate whether it’s important or not that important if necessary.

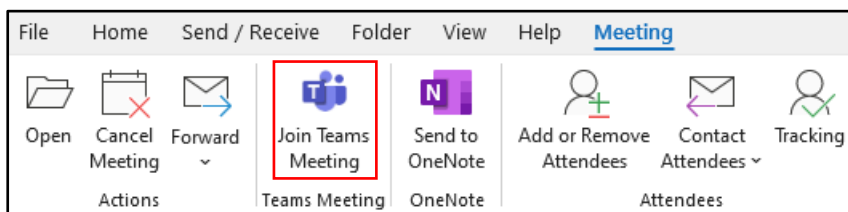


- How to edit an event:

- If you do need to modify some information on the event, navigate to your calendar and click on the event that you want to modify.
- Double click on the event or navigate to the “Meeting” tab on the tab list, click “Open” then you will be able to edit details.

- How to delete/cancel events:

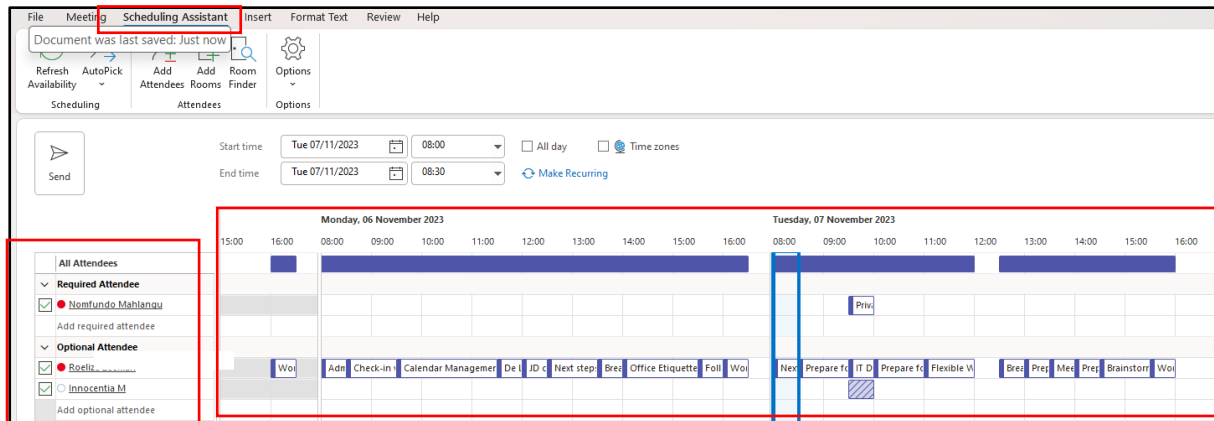
- While you have the event opened to edit it, you can cancel the event and that will delete it from your calendar and the attendee’s calendar.
- Click on “Cancel Meeting” then send it to your selected people, this will confirm your choice and it will disappear from your calendar.



6 MEETING AND EVENT SCHEDULING BEST PRACTICES

6.1 Using Scheduling Assistant

- When creating a new appointment or meeting, the “Scheduling Assistant” tab can help schedule a meeting that does not overlap with other events for you or your attendees.
- This function helps you review your attendees’ calendars and events to schedule a time where everyone is available.

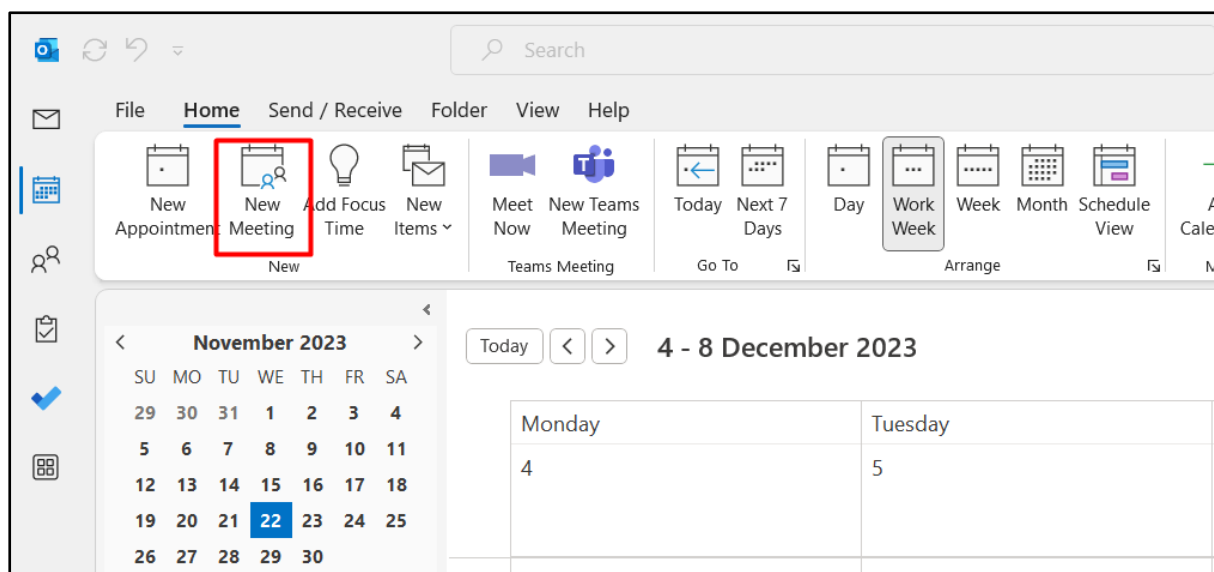


6.2 Booking Boardrooms for Meetings and Events

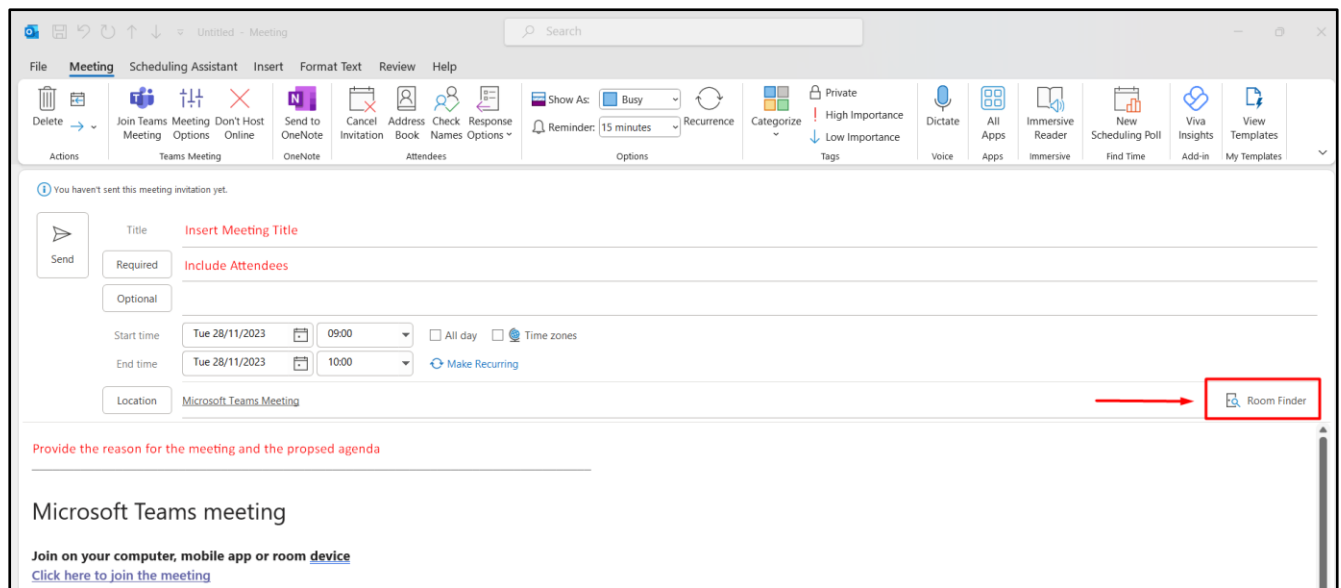
When booking a boardroom, employees must make use of Outlook’s “Room Finder” function to check whether the required boardroom is available.

It is important to note that the boardroom capacity must be considered to ensure optimal boardroom usage. Kindly refrain from booking large boardrooms for meetings with few people. Always balance the number of attendees with the size of the boardroom.

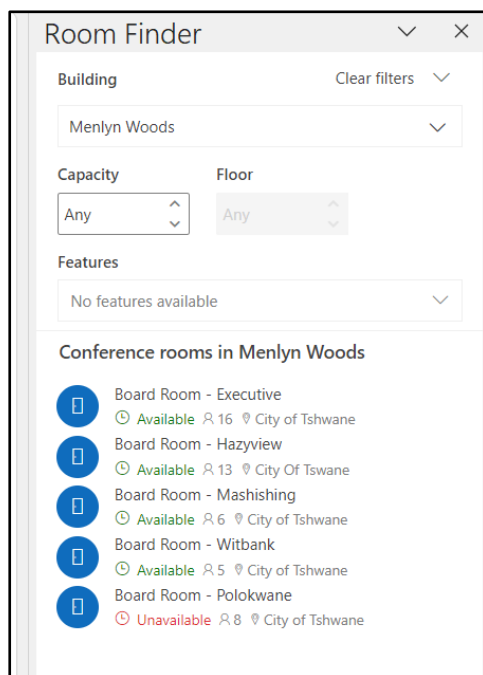
- Click on the “New Meeting” button in the toolbar.



- On the bottom right corner, click on the “Room Finder” button.

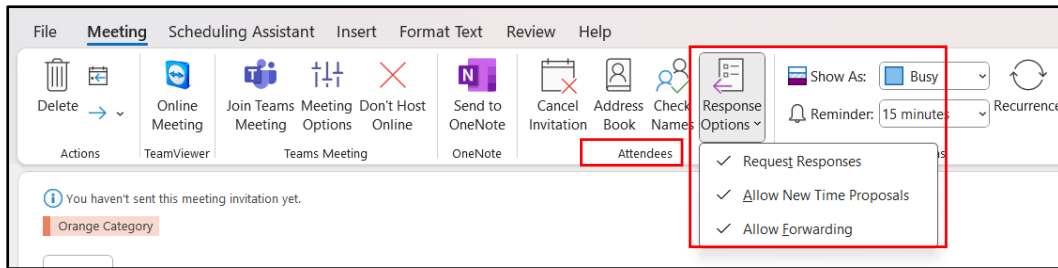


- Click on “Menlyn Woods” under “Building”.
- Here you can see the number of seats for each board room and whether the room is “Available” or “Unavailable.”

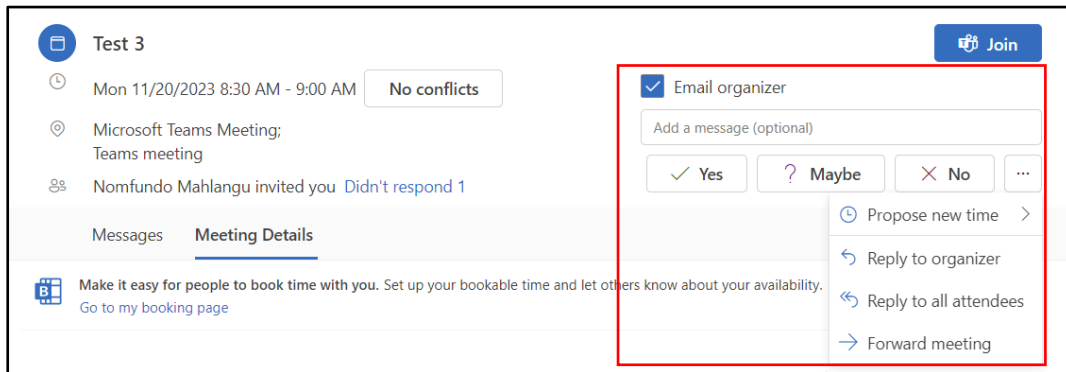


6.3 Responding to Invites (Accept, Decline, Propose New Time, Tentative)

- When you are creating the event there is a group called “Attendees” where you can choose whether to receive responses from the users, allow them to request new times or allow them to forward the meeting to other users.
- This is all up to you but the first option which is “Request Responses” should always be checked so that you get their responses when they accept or decline the event.



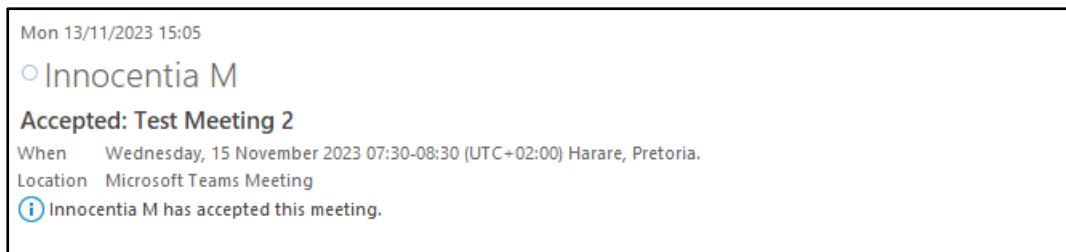
- For the “Attendees” side, they have 3 options to choose from: “Yes, Maybe, No” and they can also propose new time.



6.4 Viewing Attendance and Responses

Option 1:

As soon as “Attendees” respond to the meeting or event, you as the “organiser” shall receive emails with their responses (accepted, declined, tentative, etc.)



Option 2:

- Open your calendar, navigate to your meeting that you created, double click on the meeting or event.

13	14
20	21
27	28

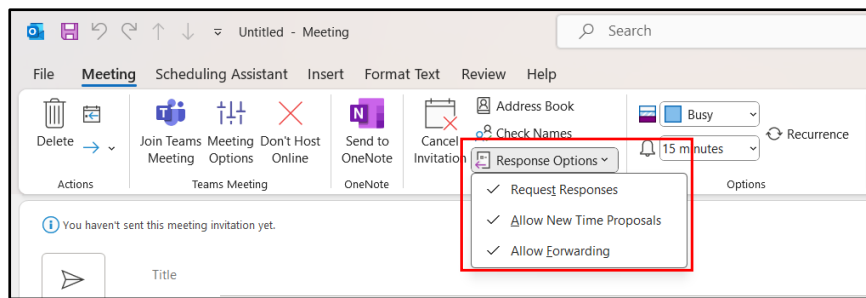
- After you open the meeting, you should be directed to the “Meeting” tab. Thereafter, find the “Tracking” button under the “Attendees” group.
- Click on the “Tracking” button, this is where you will get to see the people that have responded and what their responses are, if there is a new time request then it will also show there.

The screenshot shows the Microsoft Teams Meeting interface. The top ribbon includes 'Send / Receive', 'Folder', 'View', 'Help', and 'Meeting'. Under the 'Attendees' group, the 'Tracking' button is highlighted with a red box. Below the ribbon, the 'Tracking' tab is selected, showing a table of responses.

Name	Attendance	Response
<input checked="" type="checkbox"/> Nomfundo Mahlangu	Meeting Organizer	None
<input checked="" type="checkbox"/> Innocentia M	Required Attendee	Accepted
<input type="checkbox"/> Add a name here		

6.5 Rescheduling or Cancelling Meetings

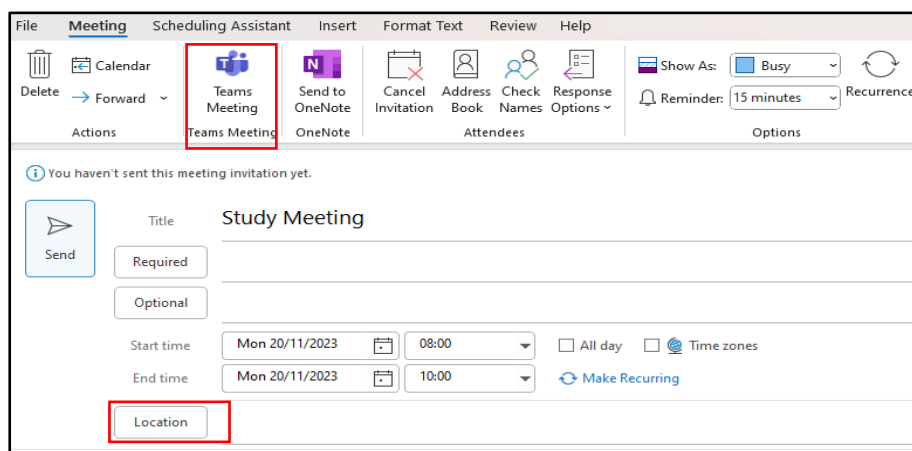
- On the “Attendees” group, you can allow your attendees to propose a new time. This would be for when you are not sure how their calendars look or whether they will be free or not.
- You as the event creator, can cancel or delete the event. Cancellation may be due to a variety of reasons, such as attendees being unable to attend or other conflicting commitments.
- You can find the “Cancel meeting” button when you edit the event, which will send an email to all your selected attendees to notify them that it has been cancelled and will disappear from their calendars.



- You should do your best to check and verify the availability of others before sending them an invite.
- It is recommended to notify your designated attendees about a meeting you are about to create and inform them that they can propose new times, so that you can discuss and find a suitable time for the event.

6.6 Scheduling Online Meetings Using Microsoft Teams

- Outlook Calendar includes an MS Teams link to join an online meeting by default when scheduling a “Meeting”.
- If the link is not included, navigate to the “Teams Meeting” group, and click on the “Teams Meeting” icon.



- Once you clicked on the button, a link with the Teams Meeting will be added at the bottom of the page. Every user included in the meeting will receive these details and will be able to join the meeting on Teams.

① You haven't sent this meeting invitation yet.

Send

Title: Study Meeting

Required

Optional

Start time: Mon 20/11/2023 08:00 ☐ All day ☐ Time zones

End time: Mon 20/11/2023 10:00 [Make Recurring](#)

Location: Microsoft Teams Meeting

Microsoft Teams meeting

Join on your computer, mobile app or room [device](#)
[Click here to join the meeting](#)

Meeting ID: 314 147 101 603
 Passcode: QcRZ24
[Download Teams](#) | [Join on the web](#)

6.7 Scheduling a Reoccurring Meeting

When creating a new meeting on your MS Outlook, a window will pop up where you get to customise your meeting. Next to the end time section, there's a "Make Recurring" button. Click on the "Make Recurring" button to edit it according to your preferences.

File Meeting Scheduling Assistant Insert Format Text Review Help

Delete → Join Teams Meeting Meeting Options Don't Host Online Send to OneNote Cancel Invitation Attendees Options Tags Voice Apps Immersive Scheduling Assistant

① You haven't sent this meeting invitation yet.

Send

Title: Testing

Required

Optional

Start time: Wed 22/11/2023 09:30 ☐ All day ☐ Time zones

End time: Wed 22/11/2023 10:00 [Make Recurring](#)

Location: Microsoft Teams Meeting

Microsoft Teams meeting

Appointment Recurrence

Appointment time

Start: 09:30

End: 10:00

Duration: 30 minutes

Recurrence pattern

☐ Daily ☒ Weekly ☐ Monthly ☐ Yearly

Recur every 1 week(s) on:

☐ Sunday ☐ Monday ☐ Tuesday ☒ Wednesday ☐ Thursday ☐ Friday ☐ Saturday

Range of recurrence

Start: Wed 22/11/2023 ☒ End by: Wed 08/05/2024

☐ End after: 25 occurrences ☐ No end date

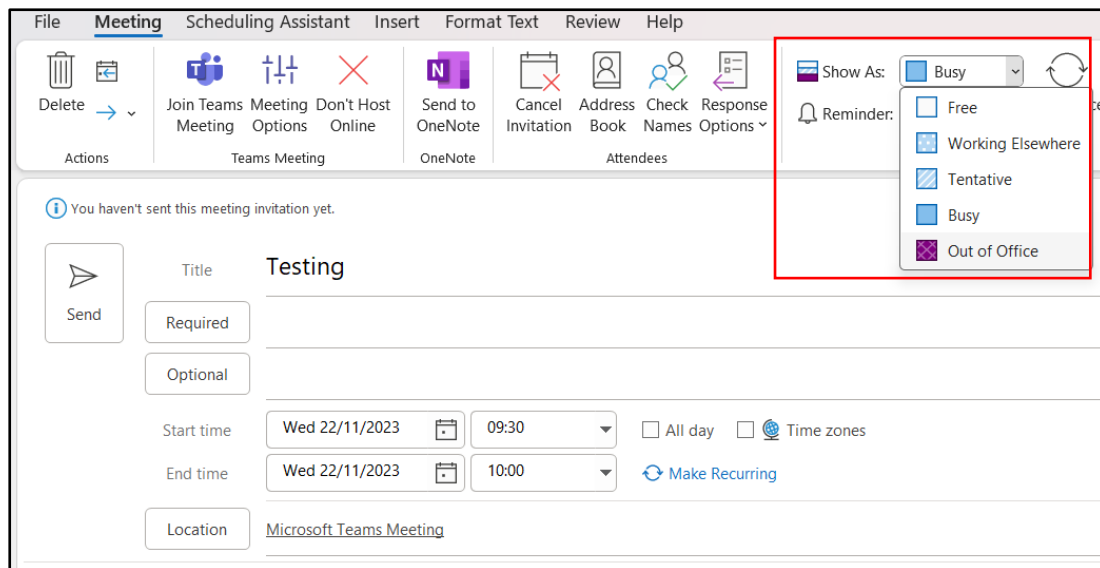
OK Cancel Remove Recurrence

7 COLLABORATION AND AVAILABILITY

7.1 "Show As"

The "Show As" function in Microsoft Outlook exists to provide a quick and visual way for users to communicate their current availability status, helping to streamline scheduling and enhance communication.

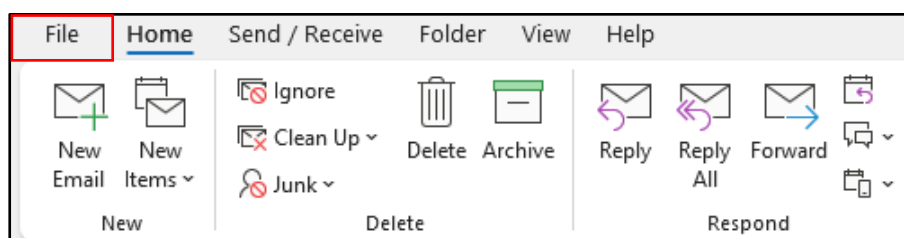
The "Show As" option can be found under "Options" ribbon, where you get to choose what other people see during a certain event. There are 5 options that you can choose from: Free, Working Elsewhere, Tentative, Busy, and Out of Office.



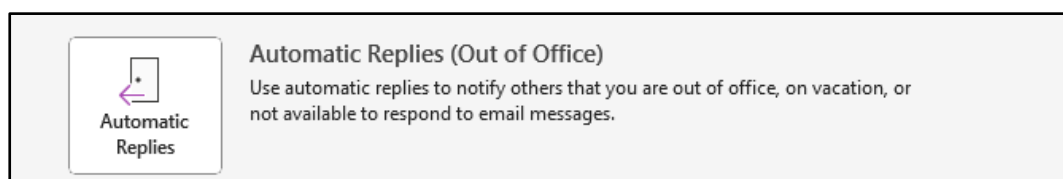
7.2 Out of Office and Automatic Replies

Employees are required to indicate when they are out of office to maintain professionalism, ensure effective communication, and manage expectations when employees are temporarily unavailable.

- To setup your “Out of office/Automatic replies”: On your Outlook, please navigate to File on the top left corner.



- You will see many options as soon as you click on “File”, look for the “Automatic Replies” button (That is where you will setup your out of office message).



- Please make sure that you have selected the “Send Automatic replies”, then make sure to fill in the start date and time of when you are not available to the end date and time. Also put in a message to explain that you are not available and who they can contact in your absence. You can choose to input a message for your organisation and for people outside your organisation.

Automatic Replies - Nomfundo@barko.co.za

☐ Do not send automatic replies
☒ Send automatic replies

☒ Only send during this time range:

Start time: Wed 20/12/2023 09:00
 End time: Thu 21/12/2023 08:00

Automatically reply once for each sender with the following messages:

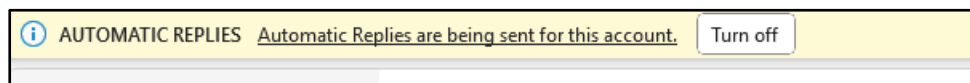
☒ Inside My Organization
 ☐ Outside My Organization (On)

Segoe UI 7

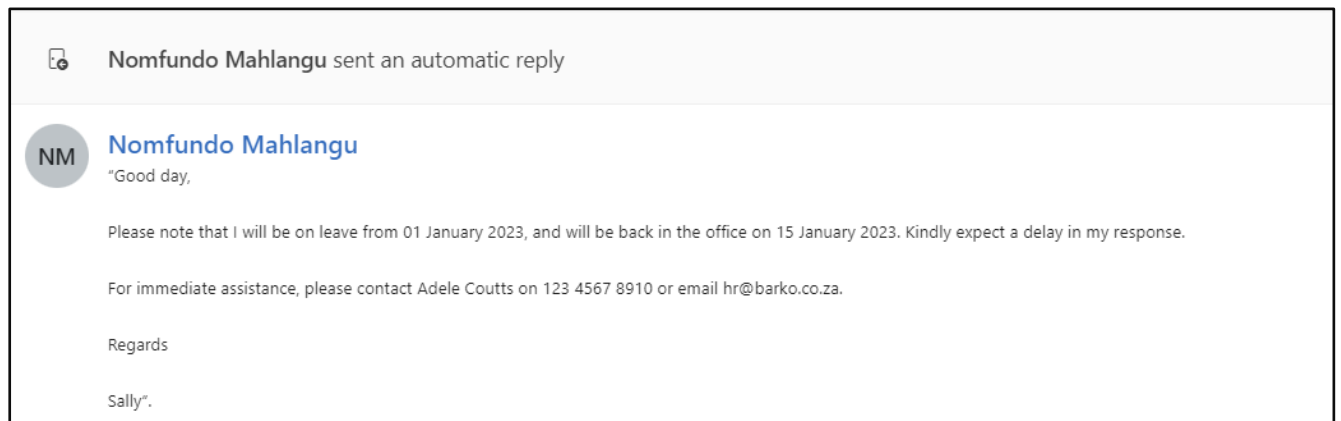
B *I* U A

"Good day,
 Please note that I will be on leave from 01 January 2023, and will be back in the office on 15 January 2023. Kindly expect a delay in my response.
 For immediate assistance, please contact Adele Coutts on 123 4567 8910 or email hr@barko.co.za.
 Regards
 Sally".

- Once you have saved your settings, you should see this message pop up on your mails once the setting has been activated.



- Users attempting to contact you shall receive the note that you left.



8 TRAINING AND SUPPORT

For more information on common issues and how to resolve them, kindly log a Barko ticket on BIP and the IT team will assist you.