



Outlook Calendar Best Practices

Contents

Overview	2
Quick Start.....	2
Reserving a room for a meeting in Microsoft 365	4
Reserving a room for a meeting using the Outlook desktop app	8
Assistance.....	9

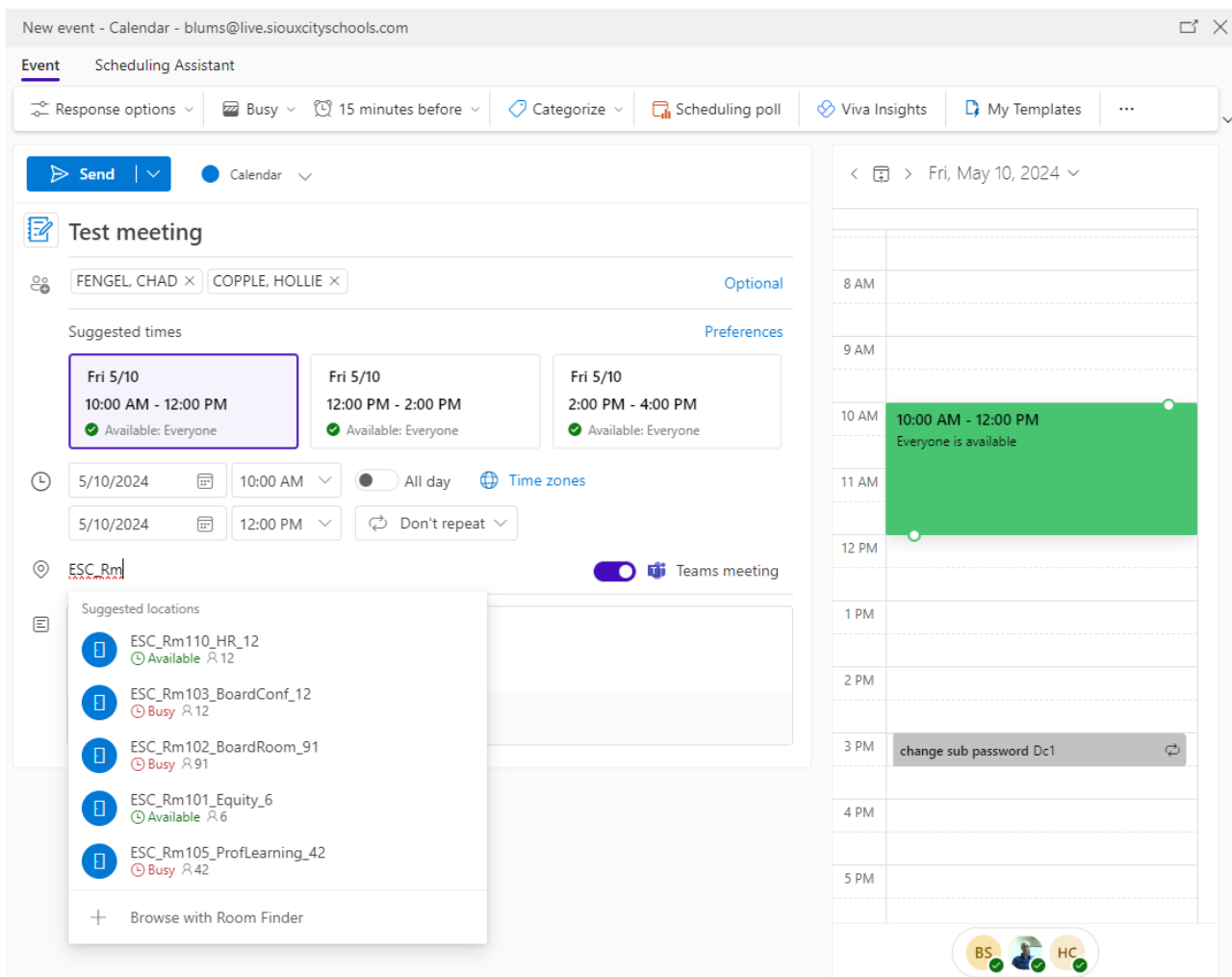
Overview

When booking a room for a meeting, certain steps should be taken to ensure everyone is reserving the spaces in the same manner and to avoid double booking a location.

Quick Start

Using the calendar for your mailbox, click on the time you would like to start your meeting. Expand the window to view the scheduling assist tools. Book your meeting in the appropriate available room and choose attendees.

Microsoft 365



New event - Calendar - blums@live.siouxcityschools.com

Event Scheduling Assistant

Response options Busy 15 minutes before Categorize Scheduling poll Viva Insights My Templates

Send Calendar

Test meeting

FENGEL, CHAD COPPLE, HOLLIE Optional

Suggested times Preferences

Fri 5/10 10:00 AM - 12:00 PM Available: Everyone

Fri 5/10 12:00 PM - 2:00 PM Available: Everyone

Fri 5/10 2:00 PM - 4:00 PM Available: Everyone

5/10/2024 10:00 AM All day Time zones

5/10/2024 12:00 PM Don't repeat

ESC_Rm Teams meeting

Suggested locations

- ESC_Rm110_HR_12 Available 12
- ESC_Rm103_BoardConf_12 Busy 12
- ESC_Rm102_BoardRoom_91 Busy 91
- ESC_Rm101_Equity_6 Available 6
- ESC_Rm105_ProfLearning_42 Busy 42

Browse with Room Finder

< > Fri, May 10, 2024

8 AM

9 AM

10 AM 10:00 AM - 12:00 PM Everyone is available

11 AM

12 PM

1 PM

2 PM

3 PM change sub password Dc1

4 PM

5 PM

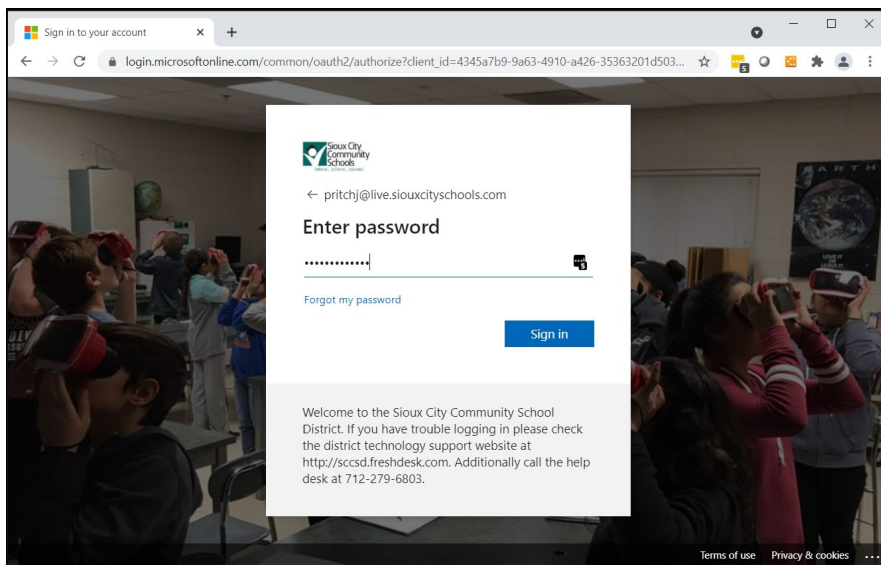
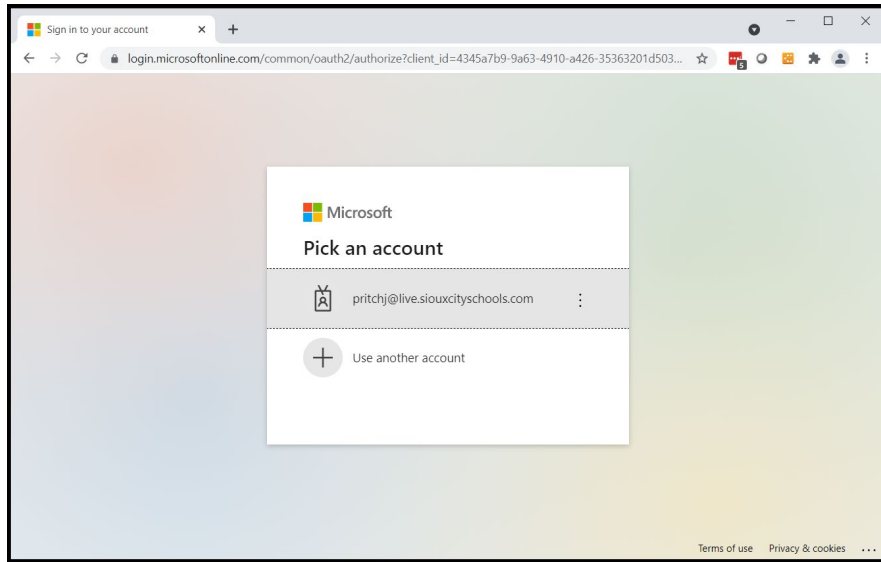
BS HC

Outlook desktop app using Scheduling Assistant

The screenshot displays the Microsoft Teams 'Scheduling Assistant' interface. The top navigation bar includes 'File', 'Meeting', 'Scheduling Assistant' (highlighted with a red box), 'Insert', 'Format Text', 'Review', and 'Help'. Below the navigation bar are icons for 'Refresh Availability', 'AutoPick', 'Add Attendees', 'Add Rooms', 'Room Finder', 'Options', and 'Send'. The main area displays a calendar view for Friday, May 10, 2024. The calendar grid shows time slots from 11 AM to 4 PM. A meeting titled 'Jennifer Gasaway - AP Psychology Exam' is scheduled from 11 AM to 12 PM. Other attendees listed include 'BLUM, STACY', 'FENGEL, CHAD', and 'COPPLE, HOLLIE'. The interface also shows options for 'All day', 'Time zones', and 'Make Recurring'.

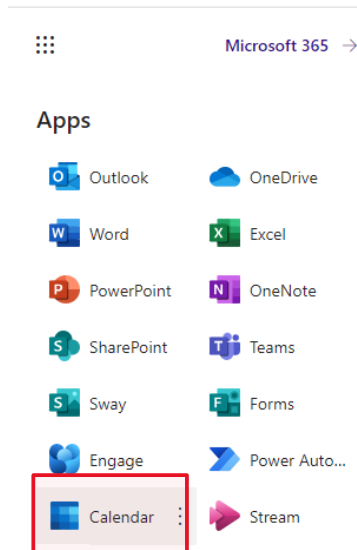
Reserving a room for a meeting in Microsoft 365

Log into your Microsoft365 account by going to office.com in a browser like Google Chrome.

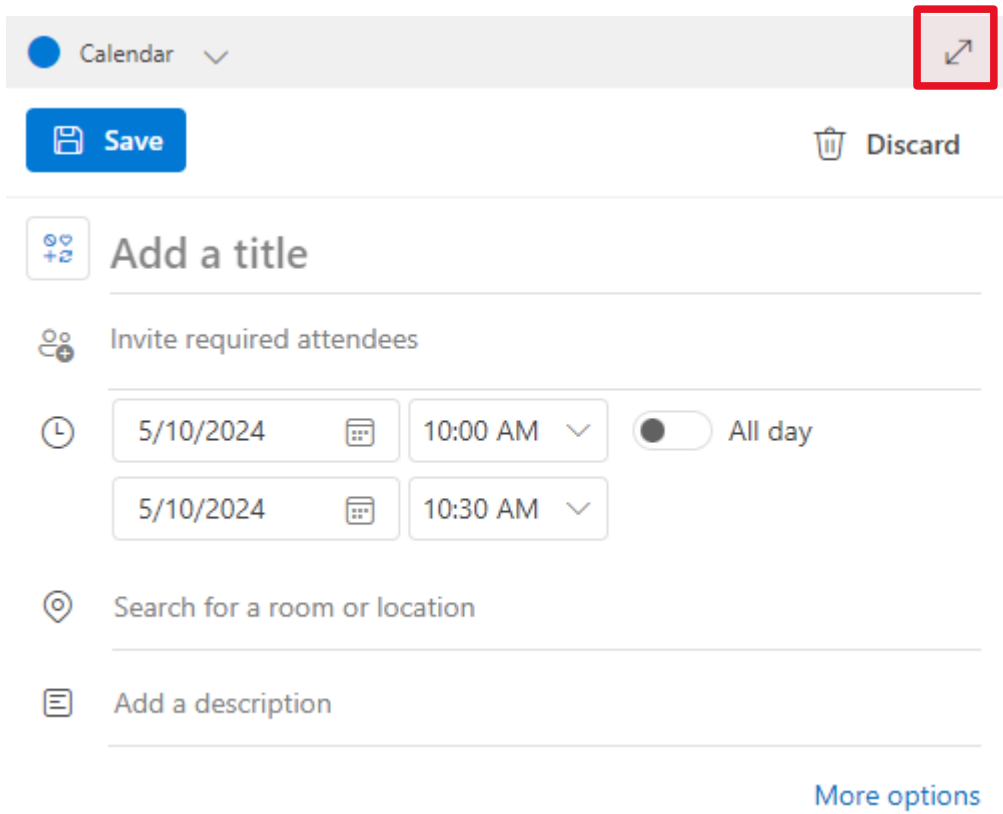


Complete multi-factor authentication.

Click on the waffle icon in the top left corner and choose calendar.



On your mailbox calendar, select a time to start the meeting. This is an important step when booking a room so that others can see who is reserving the space. Click the double arrows at the top right corner to expand the window to see all the options.



A screenshot of the Microsoft 365 'Add a title' meeting booking form. The top bar shows 'Calendar' with a dropdown arrow and an 'Expand' icon (double arrows) highlighted with a red box. Below the bar are buttons for 'Save' and 'Discard'. The main form area includes a title field, an 'Invite required attendees' section, a date and time selection section with two rows (5/10/2024, 10:00 AM and 5/10/2024, 10:30 AM), an 'All day' toggle, a 'Search for a room or location' field, and an 'Add a description' field. A 'More options' link is at the bottom right.



Add a title for your meeting and include attendees. Adjust the time to cover the entire meeting and add a room. Each item you include gives you more information about who is available during the timeframe and if the location chosen is an option. You can see from the example below that some of the attendees are not available (You and 1 other aren't available on calendar view and red X's by their names at the bottom), and several rooms are marked "Busy" and therefore are already booked. DO NOT choose a room that is marked busy. Another staff member has reserved this room, and it will not be available for your meeting.

New event - Calendar - blums@live.sioxcityschools.com

Event Scheduling Assistant

Response options Busy 15 minutes before Categorize Scheduling poll Viva Insights My Templates

Send Calendar

Test meeting

FENGEL, CHAD x COPPLE, HOLLIE x Optional

Suggested times Preferences

Tue 11/14 1:30 PM - 3:30 PM Available: Everyone

Wed 11/15 3:00 PM - 5:00 PM Available: Everyone

Thu 11/16 9:30 AM - 11:30 AM Available: Everyone

11/14/2023 11:30 AM All day Time zones

11/14/2023 1:30 PM Don't repeat

ESC_Rm Teams meeting

Suggested locations

- ESC_Rm110_HR_12 Available 12
- ESC_Rm103_BoardConf_12 Busy 12
- ESC_Rm102_BoardRoom_91 Busy 91
- ESC_Rm101_Equity_6 Available 6
- ESC_Rm105_ProfLearning_42 Busy 42

Browse with Room Finder

Tue, November 14, 2023

7 AM

8 AM

9 AM

10 AM

11 AM 11:30 AM - 1:30 PM You and 1 other aren't available

12 PM

1 PM

2 PM

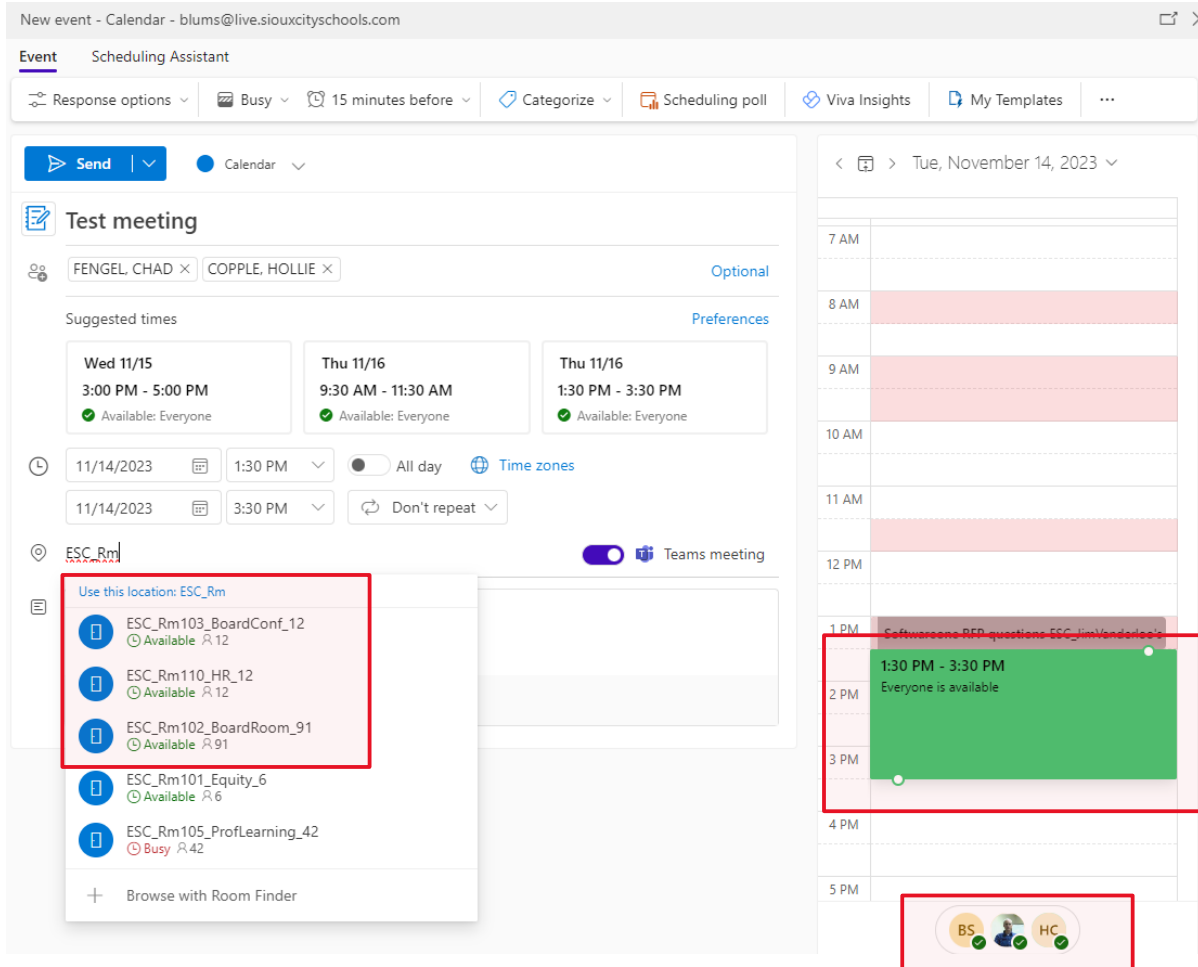
3 PM

4 PM


5 PM

BS HC

In the example below, all attendees are available (Everyone is available on calendar view and green checks by their names at the bottom), and several rooms are marked "Available". Select an available room and click send to reserve the room and invite attendees.



Once approved, you will receive an acceptance email and the final reservation will look like this on your calendar and the room calendar:

Mon 13	Tue 14	Wed 15	Thu 16
10 AM			
11 AM			
12 PM			
1 PM			
2 PM			<div> <div>  Test meeting ESC_Rm103_BoardConf_12 (US) BLUM, STACY </div> <div> BLUM, STACY ESC_Rm103_BoardConf_12 (US) </div> </div>
3 PM			



Reserving a room for a meeting using the Outlook desktop app

Open Outlook and select the calendar view. On your mailbox calendar, click on New Meeting at the top. This is an important step when booking a room so that others can see who is reserving the space. Then click on Scheduling Assistant at the top of the meeting window. Adjust the time for your meeting, add attendees, and select a Resource (Room).

You can see from this view that one attendee is not available and the room is already reserved. You must select another time and room.

The screenshot displays the Outlook Scheduling Assistant interface for a meeting titled "Test meeting - Meeting". The window shows the scheduling process for a meeting on Wednesday, November 15, 2023, from 1:00 PM to 3:00 PM. The interface includes a ribbon with tabs for File, Meeting, Scheduling Assistant, Insert, Format Text, Review, and Help. The Scheduling Assistant tab is active, showing options to Refresh Availability, AutoPick, Add Attendees, Add Rooms, Room Finder, and Options. Below the ribbon, the meeting details are shown: Start time (Wed 11/15/2023, 1:00 PM), End time (Wed 11/15/2023, 3:00 PM), and checkboxes for All day, Time zones, and Make Recurring. The main area displays a calendar grid for Wednesday, November 15, 2023, and Thursday, November 16, 2023. The grid shows the availability of attendees and resources. A red box highlights the "Required Attendee" section, which includes "BLUM, SEAN" (marked as "Support"), "FENGEL, CHAD", and "SCOTT, HOLLY". Another red box highlights the "Resource (Room or Equipm...)" section, which includes "ESC_Rm102 BoardRoom 91". The calendar grid shows that the room is already reserved for a "Monthly Principal Me" meeting on Wednesday, November 15, 2023, from 1:00 PM to 3:00 PM. The legend at the bottom indicates the status of attendees and resources: Busy (solid blue), Tentative (blue with diagonal lines), Out of Office (pink), Working Elsewhere (blue with horizontal lines), No Information (light blue), and Outside of working hours (light gray). The zoom level is set to 100%.



Here we see the attendees and the room is available. Click send to reserve the room and invite the attendees.

Once approved, you will receive an acceptance email and the final reservation will look like this on your calendar and the room calendar:

Wednesday 15	Thursday 16
9 AM	+1
10 AM	
11 AM	Test meeting ESC_Rm102_BoardRoom_91 BLUM, STACY
12 PM	Test meeting ESC_Rm102_BoardRoom_91 BLUM, STACY

Assistance

If at any time you experience issues reserving a room, please enter a help desk ticket at this [link](#).