

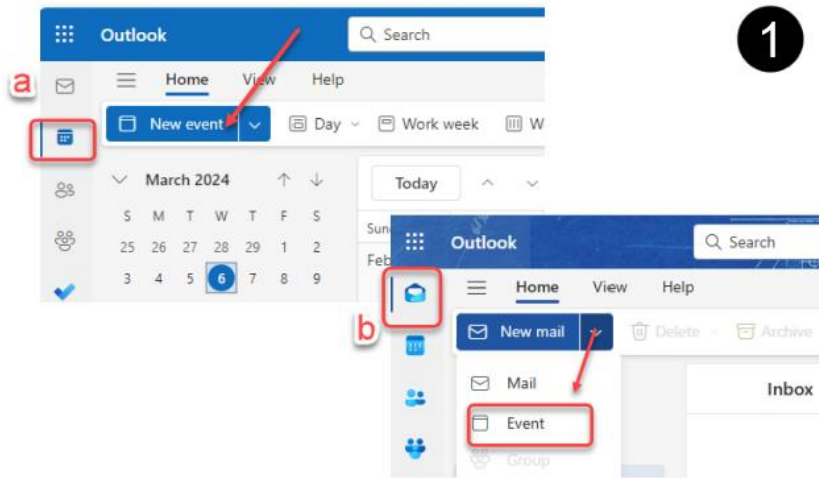
HOW TO CREATE A MEETING IN OUTLOOK

Below are the steps to take to schedule a meeting in Outlook (for guidance on how to do it in Teams please follow this document [How to create a meeting in Teams](#) on the training website):

1

a) In Outlook, go to Calendar and click on "New Event" button

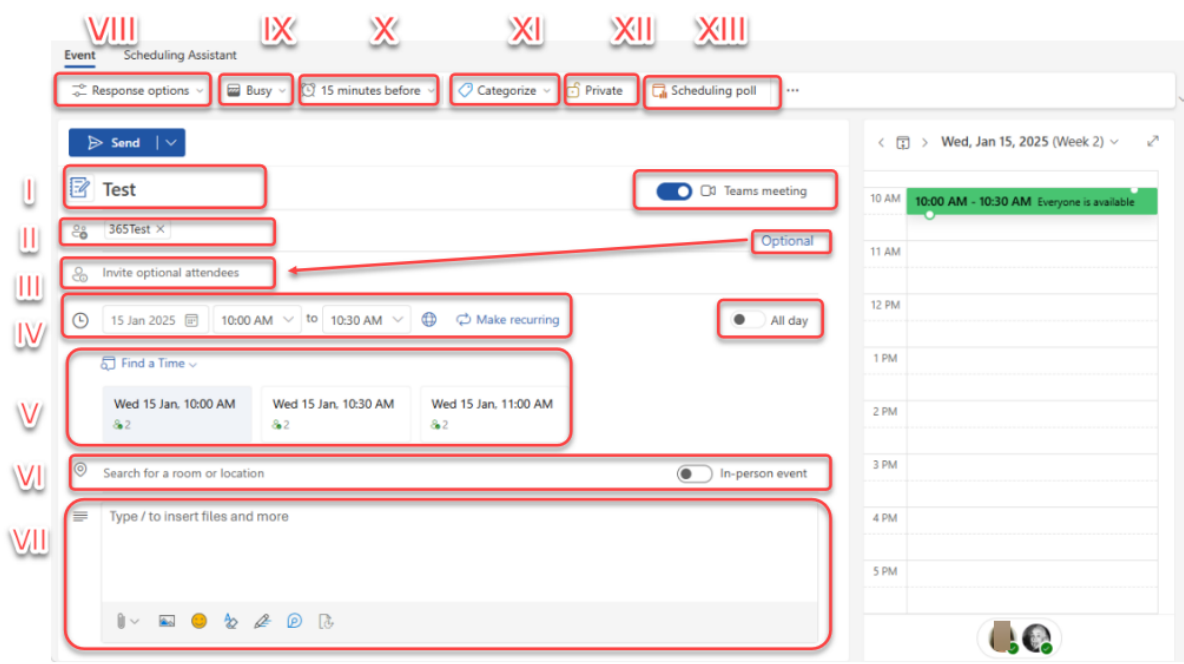
b) alternatively, from the mailbox, click on the drop-down arrow and select "Event"



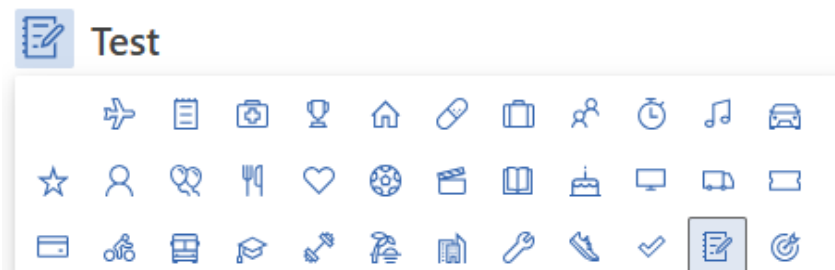
2

In the meeting you can set the following details:

- I. Meeting name
- II. Invitees
- III. Optional invitees
- IV. Date/time/duration and Repeat option ("Make recurring")
- V. Suggested times
- VI. Location
- VII. Details
- VIII. Response options
- IX. Availability
- X. Reminder
- XI. Category
- XII. Private
- XIII. Scheduling poll

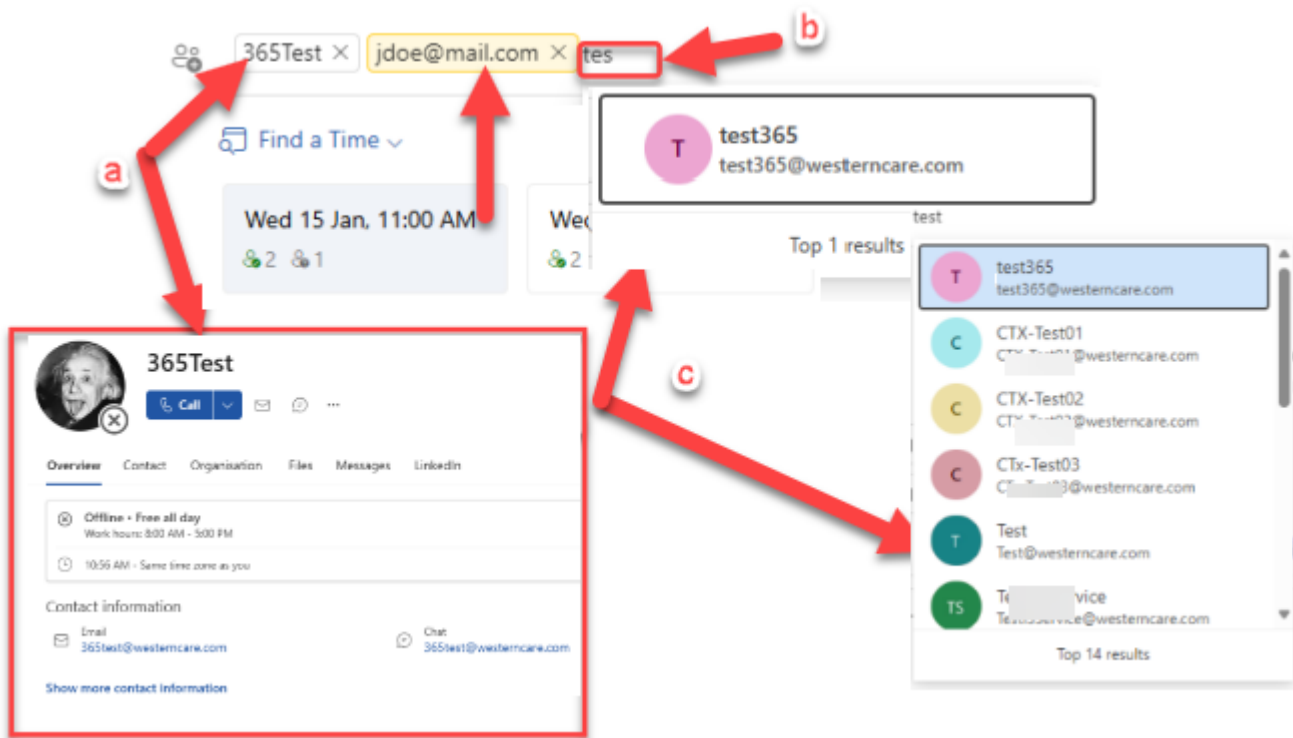


I. MEETING NAME – this is a text field, provide a name for the meeting, you can additionally select an icon symbol appropriate to the meeting by clicking on the icon next to the meeting name



You can also select Optional invitees.

II. INVITEES



a. select invitees by typing their names (type either first name like john or last name like doe and the directory will display all people whose first name/last name and or email address contain the name you entered), then select the right person from the dropdown; alternatively you can type in their whole email address if you know it. If you made a mistake in the name or are not sure you have selected the right person you - after you selected them, double-click on their name and it will open their profile in a pop-up window to show additional details that may help you determine if this is the right person.

b. if you are not getting the right result, you may need to type more letters from the first name/last name/email address

c. alternatively, if you see "Search Directory" link then click on it to get an expanded search

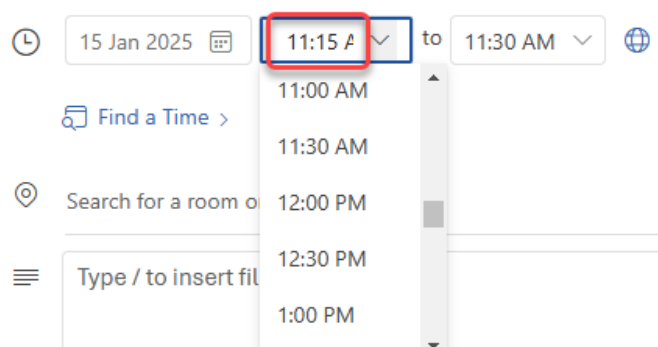
d. for external invitees you have to provide their full email address. When listing people outside the organisation by their email to include more than one after typing the email address you can type a colon ; and it will turn the selected address yellow

III. OPTIONAL INVITEES

When you click on the "Optional" button an additional field "Invite optional attendees" will display below the primary invitees field, you can enter names/email addresses of these in the same manner as above.


IV. DATE/TIME/DURATION and REPEAT OPTION

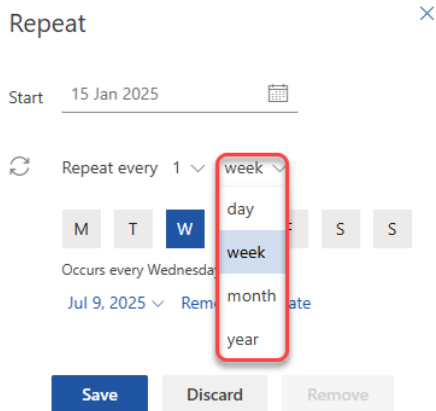
Select date and time of the meeting, you can select the duration in pre-set increments of 30 minutes/1 hour or you can insert the cursor into the time field and type in the required duration, such as shown here -->:




You can also toggle the field "All day" to make it an all-day event/meeting/invite.




REPEAT OPTION - For repeat option, if you would like to set a repeating invite, click on the dropdown arrow next to "Make recurring"  and select the option from the dropdown menu.



Repeat ×

Start 

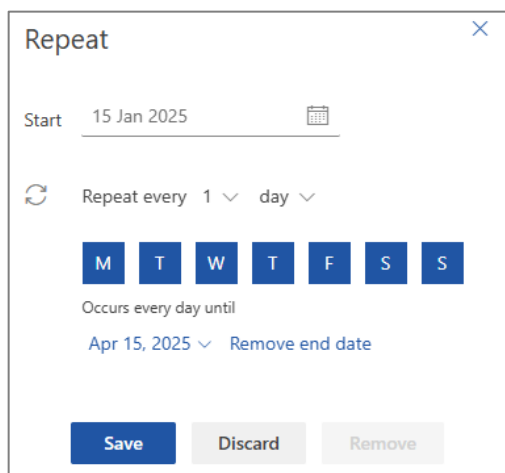
 Repeat every

M T **W** T F S S


Occurs every Wednesday


In the "Repeat" dialogue you can select the start date, frequency, end date and interval (day/week/month/year):

Daily options are:



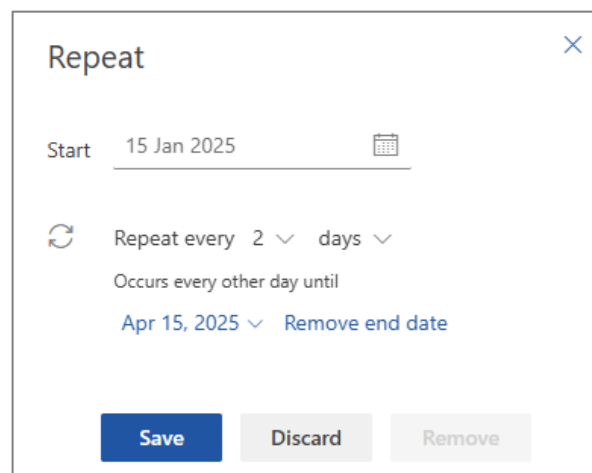
Repeat ×

Start 


 Repeat every


M **T** **W** **T** **F** **S** **S**

Occurs every day until



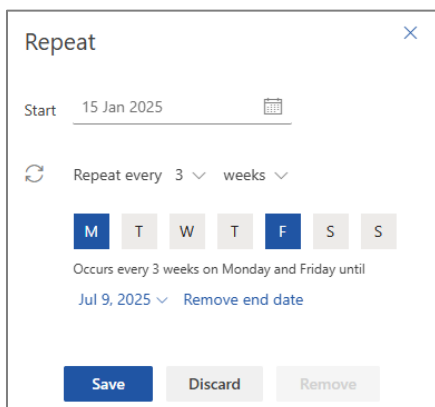
Repeat ×

Start 


 Repeat every


Occurs every other day until

For a weekly recurrence you can select the day(s) of the week the meeting, for monthly – you can select the day (eg. 15th of every month) or the day of the week (eg. On Third Wednesday of every month), for yearly – month and date of the day (15 January every year) or the number of the day + day of the week + month (every Third Wednesday of January yearly). You can also set the end date by clicking on the date drop-down or "Choose an end date", or make it indefinite (not recommended).



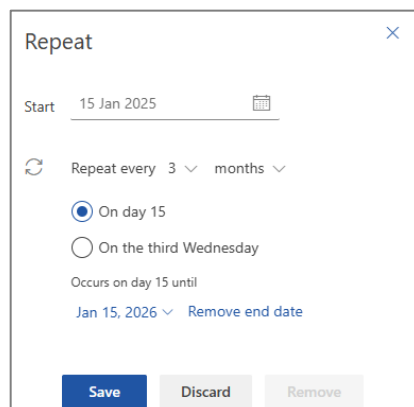
Repeat ×

Start 


 Repeat every


M **T** **W** **T** **F** **S** **S**

Occurs every 3 weeks on Monday and Friday until



Repeat ×

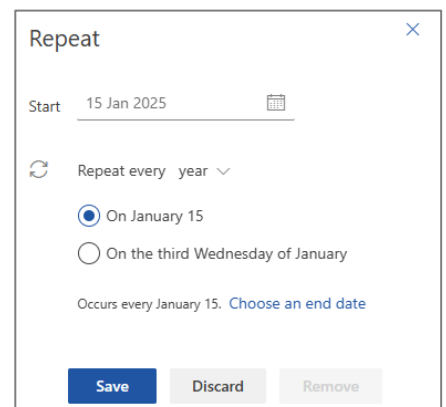
Start 

 Repeat every


On day 15


On the third Wednesday

Occurs on day 15 until



Repeat ×

Start 

 Repeat every

On January 15

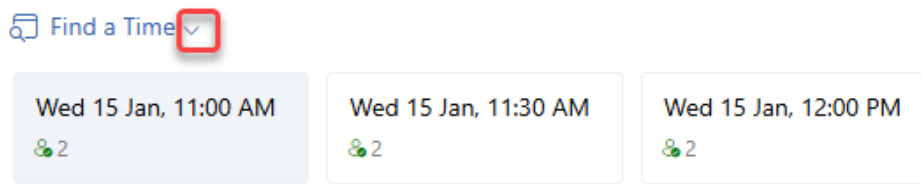
On the third Wednesday of January

Occurs every January 15.

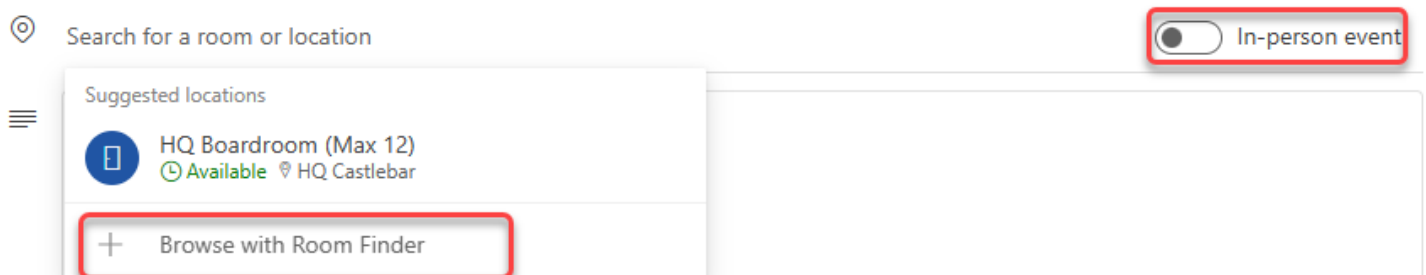
You should also provide the end date for the repeating meeting.

V. SUGGESTED TIMES

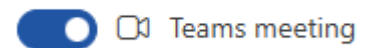
The Suggested times will be shown below the date/time fields as soon as you add invitees, based on their availability in “Find a time” section which you can access by clicking on a drop-down arrow next to it.



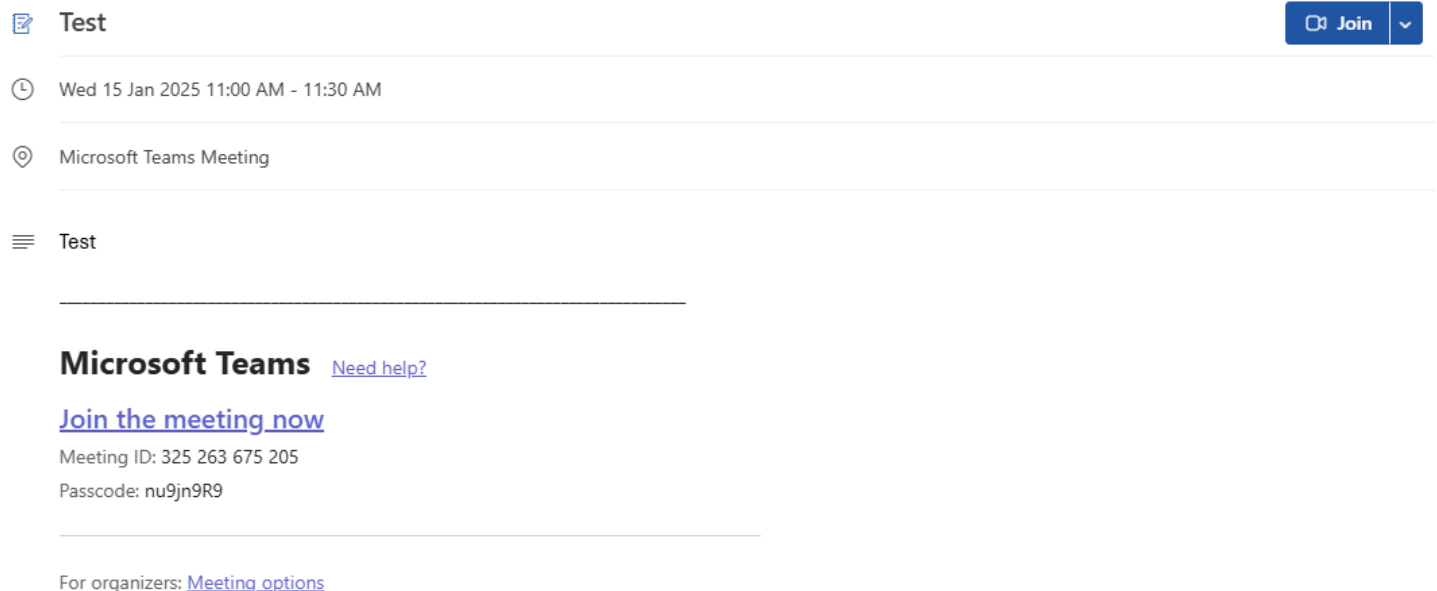
VI. LOCATION – put the cursor into the field to start, here you can choose a meeting room (either from a list of previously used like shown in the screenshot below, or by clicking on “+Browse with Room finder” (refer to "[How to book a room](#)" guide on the training website for instructions on choosing a room), or you can leave the field blank if it's an online meeting or no room has been selected yet). You can also toggle the field “In-person event” for emphasis.



Switch to “Teams meeting” to turn it into an online MS Teams meeting.



You won't see the MS Teams details right away in the invitation/event until you either save it as draft (without adding invitees). You would see them after saving and re-opening the invite:



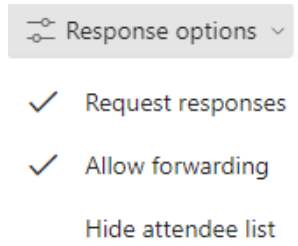
The invitees will see the following:

The screenshot shows an email interface for a Microsoft Teams meeting invitation. At the top, the subject is "Test" and the time is "Wed 15/01/2025 11:00 - 11:30". A calendar view shows a meeting slot at 11:00 titled "Test Microsoft Teams Meeting". Below the calendar, the meeting details are listed: "Microsoft Teams Meeting", "invited you Didn't respond 1", and buttons for "Accept", "Decline", and a menu icon. The email header shows the recipient as "To: 365Test" and the sender as "test". The main body of the email contains a Microsoft Teams invitation card with the following text: "Microsoft Teams [Need help?](#)", "[Join the meeting now](#)", "Meeting ID: 323 671 555 171", "Passcode: 9MF7Gr7n", and "For organizers: [Meeting options](#)".

VII. DETAILS – this is a free-form text field where you can type or insert any text, you can also attach files and pictures, emojis, Loop elements, add another spelling language/auto-correction, check for accessibility issues and format the text (below screenshot shows Formatting bar as an example):

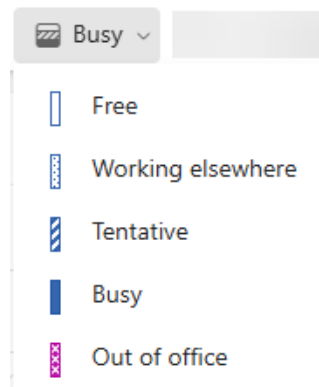
The screenshot shows a rich text editor's formatting bar. The bar is divided into two rows of icons. The top row includes icons for bold (B), italic (I), underline (U), text color (A with a color swatch), background color (A with a color swatch), bulleted list, numbered list, decrease indent, increase indent, quote, and a menu icon. The bottom row includes icons for link, unlink, insert image, emoji, insert video, insert audio, insert document, and insert link. A red dashed box highlights the top row of icons, and a red arrow points to the bold (B) icon.

VIII. RESPONSE OPTIONS



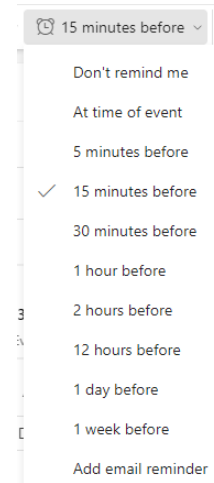
Apart from the same options found in MS Teams invitation there is an additional option to "Hide attendee list"

IX. AVAILABILITY



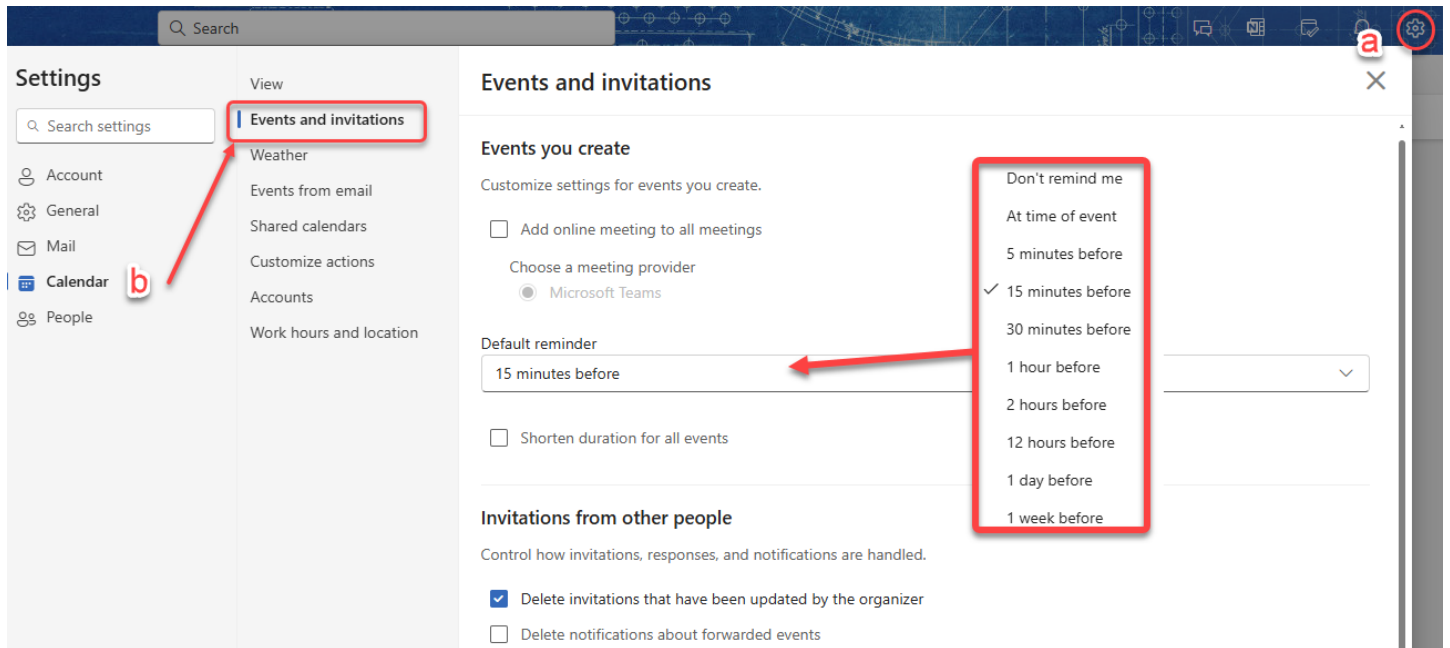
These are the choices for availability shown for the duration of the meeting in your calendar

X. REMINDER



You can set a reminder for your calendar in this drop-down menu

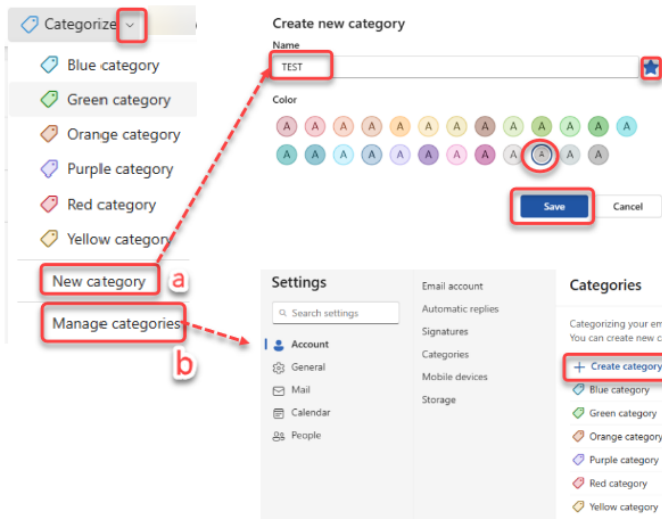
You can change the default Reminder interval in Outlook settings:



- a) In Outlook click on the "Settings" button (cog)
- b) Click on Calendar, then Events and Invitations

Under "Default reminder" change it to the interval you wish and click on "Save".

XI. CATEGORY



When you click on the drop-down arrow you can select a different colour category to make your invitations visually different.

a) you can create a new category yourself, and give it a name, choose a colour and even make it a favourite by selecting a star next to the name

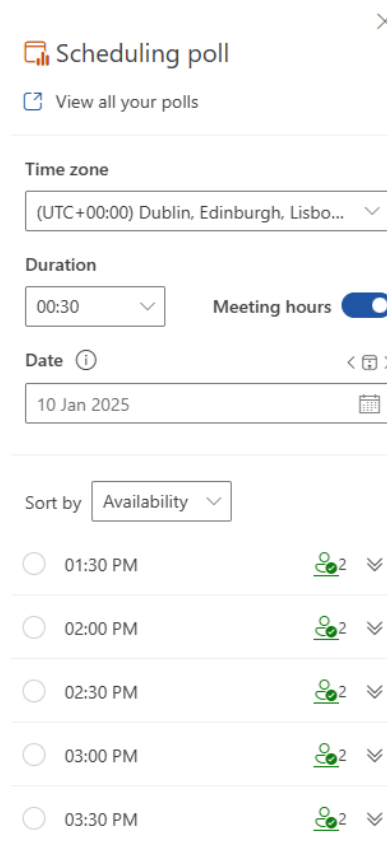
b) you can also create a new category in exact same manner, and or delete/edit and make favourites of existing categories by clicking on "Manage categories"

XII. PRIVATE Private

If you wish to make your invitation Private, so that it's restricted and marked this way, you can click on this button.

XIII. SCHEDULING POLL

This is a very handy feature in addition to the Scheduling assistant that gives you a quick view of most suitable times for all invitees, you can change the date and duration in it without having to change it in the invitation itself



SCHEDULING ASSISTANT

“Scheduling Assistant” is located in a tab next to the main tab “Event” where you can see all the details.

Test - Meeting

Event **Scheduling Assistant**

Options

- ✓ Show detailed scheduling data
- ✓ Show only my working hours

Send

15 Jan 2025 12:00 PM to 12:30 PM All day

Wednesday, January 15, 2025

10 AM 11 AM 12 PM 1 PM 2 PM 3 PM 4 PM 5 PM 6 PM 7 F

Availability

Required attendees

Unavailable

365Test Available

Add required attendee

Optional attendees

Add optional attendee

Rooms

Add a room

Busy Tentative Out of office Unknown Working elsewhere Outside of working hours

Scheduling Assistant will help you see whether the invitees have conflicting meetings for the time you have chosen and you can move it to the time that suits most by simply dragging the meeting bar across. Another handy feature is the option to "Show only my working hours" in Options