# Best Practices for Outlook Calendaring 2010/2011/2013

Microsoft recommends the calendaring best practices outlined below. Please note that these best practices should be used by mailbox owners and their delegates, those who have access to create or edit entries in another person's calendar.

First is might be helpful to define the differences between Appointments, Meetings, Events, and Tasks to better understand which option you would like to enter into your calendar:

**Appointment:** An appointment is an activity that involves only you, at a scheduled time.
**Meeting:** A meeting occurs at a scheduled time, like an appointment, but a meeting involves other people invited using a meeting request sent via email. Meetings appear both in your calendar and in the calendars of people who are involved.
**Event:** An event is an activity that lasts all day. Unlike an appointment or meeting, an event, by default, does not block out time in your calendar. With an event, you can still have other entries appear in your schedule for that day.
**Task:** A task is an activity that involves only you and does not need a scheduled time.

## General Best Practices with Outlook Calendar

1. **Expect to experience some calendar inconsistencies if you do not run the *same version* of Outlook on the *same platform* (either Mac or PC) on *all* of your computers.** If you are running different versions of Outlook or are using different platforms, you will occasionally encounter strange calendar behavior.
* If you have 2 computers (both for the office, or a work and a personal machine), one of which is a Windows PC and one is a Mac, use [Outlook Web App (OWA)](http://email.wcu.edu/)rather than Outlook on the computer that is *not* your primary one.
* Executives and managers and their calendar delegates should use the same version of Outlook on the same platform as well.
1. **Keep only your own calendar open.** Whenever you finish accessing the calendar of another individual or a shared resource to schedule a meeting, close it.
* For each calendar you keep open, you impact the performance of your own Exchange account on your computer.
* If you just need to open up someone’s calendar to check it one time, you may want to use the “Scheduling Assistant” in the meeting request itself to view their "Free/Busy" times, rather than actually opening up their calendar folder on your account. The more calendar folders you have open, the more that will have to update from then on, which can slow the performance of your email program.

## Best Practices for Scheduling Meetings

1. **Do not set a meeting as a “recurring event” unless it will not vary .**The only meetings which should be set as a recurring series are meetings that will not vary in who is invited, meeting time, or location. If your meeting series is going to vary with any frequency at all, do not set it as recurring; just create an individual calendar entry for each instance.
	1. Editing just a couple of instances of a recurring meeting will likely corrupt the entire series, due to the way various email programs process meeting requests, and the latency involved with different attendees accessing their calendars.
	2. Meetings can easily become lost, report incorrect schedule times, or duplicated after repeated updates, and once a meeting is corrupted, it will always be corrupted until it is deleted.
	3. Be aware that when you change a recurring meeting, the series will be adjusted accordingly, even *retroactively*.
	4. If you have already set up a recurring meeting but it regularly changes invitees, time, or location, cancel the meeting series for all attendees and begin creating new calendar entries for each meeting occasion in the future.
	5. To change an entire series of meetings, cancel the original meeting and create a new one. To change one instance, cancel just that meeting and create a new one to replace it.
		* Be aware that canceling a series will delete the entire meeting history. If you want to keep the previous meetings on your calendar, set an end date for that series to preserve past occurrences, then create a *new* series for the future
	6. Schedule end dates on recurring meetings. **Preferably no more than 6 months out.**
		* Setting your recurring meeting series to have an end date no further out than 6 months prevents corrupted meetings if the recurring meeting is later modified.
		* Do not set a meeting series to occur “indefinitely,” as that can cause server synchronization problems, particularly for mobile device users.
2. **Do not interact with a calendar request after is has been processed.** Moving or deleting a meeting request that someone has sent you to which you have already replied (accepted or declined) can result in deletion or corruption of the calendar event.
	1. After it has been processed, you can change your reply status from “Accept” or “Accept as tentative” to fully “Accept,” “Accept as Tentative,” or “Decline.”
	2. You should *not*move an already-accepted meeting to another time on your calendar. If you do, your changes may be lost, or the meeting may become corrupted on your calendar.
	3. Don't forward meeting requests. New attendees should be added to the original attendee list by the organizer.
	4. You can rearrange your own personal appointments without issue.
3. **Choose to “Send Update” when deleting, canceling, changing, or moving events, or when inviting another person after sending out the original meeting request.** If you do not send out an update, attendees will not know what you have changed.
	1. Note in the body text of the updated email specifically *what* you are changing from the original meeting invitation, as attendees may not be able to tell at a glance.
	2. If you are inviting someone new to the attendee list (add them in the *To:* line), send an update to all attendees and make a note of this in the message body text.
4. **Avoid double-bookings by “inviting” the meeting room to the meeting; do *not* just type in your desired room in the *Location:*line.** To reserve a shared room you must “invite” it to the meeting, just as you would a person. If you do not actually invite the room, the availability for that time slot has not been checked, and it has not been reserved for your meeting.
	1. To invite a room:
	* Create a new meeting invitation message.
	* Click the **Rooms**button adjacent to the *Location:* line.
	* Find your desired room
	* Be sure the name of the room appears at the bottom of the dialog box next to the *Rooms: ->* button, then click **OK**.
	1. You can check under the Scheduling Assistant view to make sure the room is not already booked before sending your message.

## Best Practices When Processing Meeting Requests in Outlook

1. **Do not delete a meeting invite.** Action should always be taken on a calendar event: *Accept, Accept as Tentative, or Decline*.  If an invite is deleted before the mailbox owner or the delegate has had a chance to accept or decline it, then the meeting will disappear from the calendar. If you are not sure the meeting is on your calendar, do not delete it. In addition, when a meeting request is received, Outlook will automatically insert a placeholder for that meeting on your calendar, even before you've had a chance to accept or decline. A picture of this placeholder appears below compared with a picture of an appointment that's been properly accepted. If you see this placeholder, it means that the meeting has **not** been firmly accepted. If there is still a meeting invite for this meeting in your mailbox, you should take action to accept or decline.
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*Note: The placeholder on the left is faded in appearance and has a stripe on the left with alternating colors. The properly accepted meeting on the right has a solid color line and is not faded in appearance.*
2. **Always send responses to a meeting request.**  It is important for meeting organizers to know who is attending a meeting. Organizers know this because of the meeting response emails. Always send an email response even if it is only tentative.
3. **Take action only from the Inbox**. Accept, accept tentatively, or decline invites from the Inbox, not from the Calendar or from a mobile device. Manage your calendar exclusively from Outlook or OWA. Do not accept, decline, modify or invite others to appointments from your mobile device or in the Calendar. You can, however, create new appointments on your mobile device, (e.g., add one while checking out at a doctor's office).
	1. If you process a meeting invitation from your Inbox on Outlook or OWA and then see the request is still there on your smartphone, tablet, or mobile device, *go ahead and respond to the meeting request the same way again.* Deleting a request on one device after accepting it on another can cause the meeting to disappear from your calendar.
	2. If you accepted a meeting tentatively and you need to decline or accept the meeting, you will need to do this from the Calendar.
4. **Accept meeting cancellations.** If you receive a meeting cancellation message, open the message and click on the “Remove from Calendar” button. The meeting will be removed from the calendar. By doing this you will avoid having a cancelled meeting still appear in your calendar.
5. **Do not forward meeting requests. The meeting organizer should always add new members to the attendee list and send an update to the original meeting. If you are not the meeting organizer and need to send a proxy in your place, please ask the meeting organizer to update the attendee list with that information**
6. **Do not make personal notes in meetings as an attendee.** Doing so will result in lost notes if a meeting update is sent later.

## Best Practices for Using Delegates in Outlook

1. **Select as few delegates as possible, IT recommends no more than 1 delegate with Editor permissions and no more than 2 with Reviewer and/or Contributor permissions, preferably none.** While delegates can be very helpful, they dramatically increase the probability of missing appointments, duplicated meetings, unseen invitations, and conflicting attendance responses. Delegates are most appropriate for executives who need an assistant to completely manage their calendars for them. A good guideline is:
	1. If you need someone to completely manage your meeting-related messages (accept/decline all invitations on your behalf), specify a delegate.
	2. If you just want someone to be able to create or change meetings on your calendar for you, give that person the appropriate level of permissions to your calendar. In most cases, merely granting them “Author” or “Editor” permissions would do.
2. **Have an agreed-upon procedure for handling meeting invites**, especially if there's more than one person with access to a calendar. Only one person should be accepting and declining meeting invites, either the mailbox owner or a single delegate. If the delegate will be performing this, then the mailbox owner may choose to instruct Outlook to send meeting requests only to the delegate.
	1. If you absolutely must use more than one delegate, agree that one delegate will always delete meeting-related messages *after*the other person has had a chance to process (accept/decline) the meeting. (Note: If the meeting is deleted by one delegate before the meeting is processed by the other, the meeting will be lost.)
3. **Both you and your delegate should be running the same version of Outlook on the same platform (either Mac or PC).**For manager/assistant relationships, it is *highly* recommended that the same version of operating system and mail program are used by both people.
	1. Mixing platforms and versions creates lots of calendaring problems, particularly if the delegate is frequently accessing, modifying, and editing the executive’s calendar.
	2. Expect to experience some email/calendar inconsistencies if you and your delegate are running different versions of Outlook or are using different platforms.
	3. If you have a delegate who manages calendars for multiple individuals, some of whom use Windows and some of whom use Macs, we recommend providing the assistant with *both* a Windows computer and a Mac computer. This ensures calendar integrity by allowing the assistant to process meeting requests using the same platform as the executive.