Reserving a Motor Pool Vehicle – Microsoft Outlook 2016

Standard Operating Procedure (SOP)

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Establishing “New Meetings” in Outlook

How to schedule reservations for motor vehicles at GCRL.

Director of Facilities Management

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Standard Operating Procedure Approval Sheet

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Whenever this document is revised, the revision number will be incremented and the document re-approved. Electronic approval is as valid as actual signature.

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Distribution

The distribution sheet has the minimum distribution identified.

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1. **Scheduling Motor Pool Reservations**

The calendar in Outlook 2016 allows you to set appointments, as well as, schedule meetings and locations. For now, we are going to use this to make Motor Pool reservations of vehicles.

1.1 **Creating a “Meeting” in Outlook, or How to Make a Reservation**

1. Click Calendar icon in the bottom left corner.

2. Click New Meeting at top left.

3. Enter a Subject.

   **Note:** The Subject is what will appear on your calendar. Example: Vehicle # 13654 Reservation

4. Click on Rooms on invitation’s right,
OR ...

Navigate to Scheduling Assistant, highlight the date and time wanted, and then click on Add Rooms at the bottom of the screen. For more information on availability of the Resource being reserved, see Scheduling Assistant below.
5. When the Address List comes up, select the dropdown arrow under Address Book. Select All Equipment, and navigate to the GCRL Vehicles to be reserved. Once the desired Vehicle is highlighted, Click Rooms to add the Vehicle, and click OK at bottom right of window.

6. If this is insufficient information to make the reservation, either double-click on the value in the Rooms field, or right click and select Properties. When the Properties information pops up about the vehicle that is to be reserved, click on the Phone/Notes tab to see if there is any further information in the Notes field. If still more information is needed, call the listed phone number.
7. **Scheduling Assistant**: Navigate to **Scheduling Assistant** as shown above. Busy times for all participants and for the Resource/Room/Equipment/Vehicle are shown as blocks in the central panel of Scheduling Assistant. You can now select a time when the room is available which is convenient for all participants:

(a.) You may add as many people or resources as you wish to decide who/what is needed. Outlook will display the free/busy times for each. For people this is assuming they maintain their calendar up to date with appointments. The following colors are indicators:

- **Blue**: The marked time is Busy.
- **Blue and White Striped**: Scheduled with tentative appointments.
- **Purple**: This time is marked as out of office.
- **Black and White Striped**: Outlook has no information for item. The item may not be an Outlook/Exchange user, a USM user, or does not have an Outlook Calendar set up, or some other issue.
8. Once the Vehicle is selected by clicking OK, then the Location field will automatically be filled, and the To field will show the invited vehicle.

(a.) If additional people are needed for the meeting, separate them in the To field with semicolons, and click Check Names if they have not been emailed before.
(b.) In the Show As field, dropdown arrow can be selected to indicate whether this reservation will indicate your free/busy status.
(c.) Lastly, the Private/Public indicator can be toggled to hide the meeting information or not.

9. Enter a Start date/time, and an End date/time.

(a.) Either enter the hours the vehicle will be needed or select ‘All day event’ if the event will last 24-hours. An all-day event will appear on the calendar at the very top of the day of the event.
(b.) If reservation needs to be a repeating event, click on Recurrence (Example: A 10-passenger van is needed every Tuesday and Thursday for a month)
(c.) Once **Recurrence** is clicked, this window will pop-up.

![Appointment Recurrence window]

(1.) Set the **Recurrence pattern** to Daily, Weekly, Monthly, or Yearly.

![Recurrence pattern options]

(2.) Set any **options** based upon your **Recurrence pattern**.

![Recurrence pattern options with options set]
(3.) Set the **Range of recurrence** by entering the **Start** and **End** dates or other occurrence options.

(4.) Once these **Recurrence** options are set, click **OK**.

(d.) Select **Show As** to indicate your time as free/busy, and set a **Reminder** time if you would like the appointment alert to pop up.

(e.) Provide details pertinent to the reservation especially if traveling. For example, “Vehicle will be used to travel to an out of state meeting”. Also, see example in image.
10. Once the vehicle is selected, availability is determined, and the time frame it is needed is selected, then all that remains is to send in the reservation request. On the invitation there are notes to indicate whether the invitation has been sent, if there are any conflicts, and if the meeting has a recurrence pattern. If all is well with these items, then click on Send.

11. Once the invitation is sent, a confirmation email will be returned automatically from Outlook indicating that the reservation/meeting request was either Accepted or Declined. See examples of emails below:
2. **CANCELLING A MEETING**

1. Click the Calendar icon in the bottom left corner of Outlook to display the calendar.

2. Navigate to meeting/reservation to be cancelled and **right-click** on the meeting. Click on **Cancel Meeting**. If it is a recurring meeting, either select to eliminate the indicated meeting by clicking on **Cancel Occurrence**, or delete all the meetings by clicking on **Cancel Series**.
3. Once the selection is made, the meeting opens. Click on **Send Cancellation** to cancel the meeting/reservation. If people were invited in addition to the vehicle, a note may be added to the body of the meeting before sending the cancellation as way of explanation.

   ![Send Cancellation](image)

   The cancellation has not been sent for this meeting. Click **Send Cancellation** to update meeting attendees.

   ![Calendar](image)

   During this phase, we will need to transport group between the two labs.

3. **Adding Shared Calendars, Conference Room or Vehicle Calendar to the Outlook Desktop**

   1. If you would like to be able to review the vehicle calendar before making a reservation, you may want to add the calendar to your desktop. Click on **Open Calendar**, select **From Room List** (other options are also listed), and then select **Open**.
2. When the *Address List* comes up, select the dropdown arrow under *Address Book*. Select *All Equipment*, and navigate to the GCRL Vehicles. Once the desired Vehicle is highlighted, **Click Rooms** to add the Vehicle, and click **OK** at bottom right of window.

3. **Viewing Calendars.**

(a) 

(b) 

(c)
(a.) Once you add the Vehicle’s calendar to your desktop, it will add a section below **My Calendars** called **Rooms**. The item labeled **Calendar** under **My Calendars** is your personal calendar. It will be highlighted in a color, such as, Blue and the Calendar is displayed in the center of the screen also highlighted in the same color and labeled as Calendar. To hide/display the Calendar uncheck/check the box next to it.

Note: One calendar must always be displayed, and it will default to the personal one, **Calendar**.

(b.) The Vehicle’s calendar will be under the **Rooms** label. It is highlighted in a color, such as, Orange and the Calendar is displayed in the center of the screen also highlighted in the same color and labeled with its name. To hide/display the vehicle uncheck/check the box next to it.

(c.) At the top of the screen there is a section titled, **Arrange**. By clicking on the options **Day**, **Work Week**, **Week**, or **Month** in that section, the central display will change to display that amount of time for the calendar.

In the example below, the selected calendar has been chosen to display a month, on the right June-2017 was selected to display, and the details for that month are shown in the screen center.

![Calendar Display Example](image)

4. **DELETING A SHARED CALENDARS, CONFERENCE ROOM OR VEHICLE CALENDAR TO THE OUTLOOK DESKTOP**
1. Select calendar you are wanting to remove from your desktop, right-click. When the menu pops up, click **Delete Calendar**.

![Deleting a calendar](image1.png)

2. If you would like to remove all rooms/vehicles/equipment calendars from your desktop, right-click on **Rooms**. When the menu pops up, click **Delete Group**. A confirmation request will pop-up, click on **Yes**, and that **Group** will be gone.

![Deleting a group](image2.png)