Managing Outlook Calendar

The purpose of this guide is to assist with proper organization of the calendar feature in Outlook. This guide supplements existing policies, standards and practices related to the management of information in the Government of Alberta.

If left unmanaged, too many calendar items affect not only the performance of Outlook, but also productivity.

This guide covers:

- finding recurring calendar items;
- categorizing recurring calendar items;
- using conditional operations to locate old calendar items; and
- deleting older calendar items.

NOTE: This guide is specific to Outlook 2010, but may be relevant to other versions.

Finding and Categorizing Recurring Calendar Items

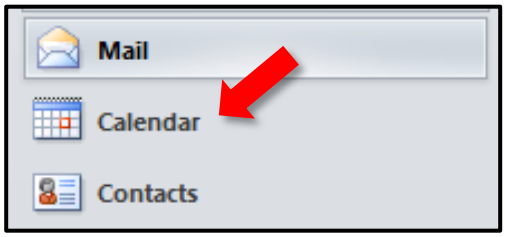
Before deleting any calendar items, it is important to identify recurring events and any items containing official records—files may be attached to calendar events.

Some calendar items are one-time events; others take place on a recurring basis for an extended period of time, such as a weekly team meeting. Deleting past calendar items that are part of a recurring calendar item series will also remove all future instances of the item.

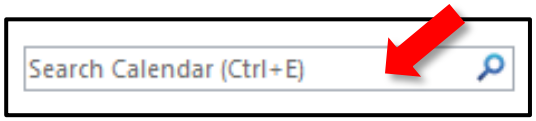
Categorizing recurring items will help prevent inadvertent deletion.

Steps

1. From the **Home** tab of Outlook, select **Calendar** (typically located on the lower left side of the screen).



2. Locate the **Search Tool** and click inside of it (**NOTE:** the **Search Tool** may be located in different places depending on Outlook configuration. It is usually located near the top of the screen under the tool ribbon).



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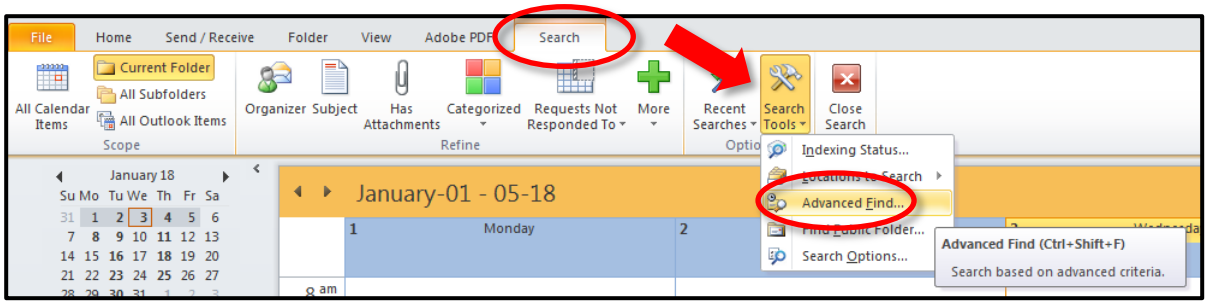
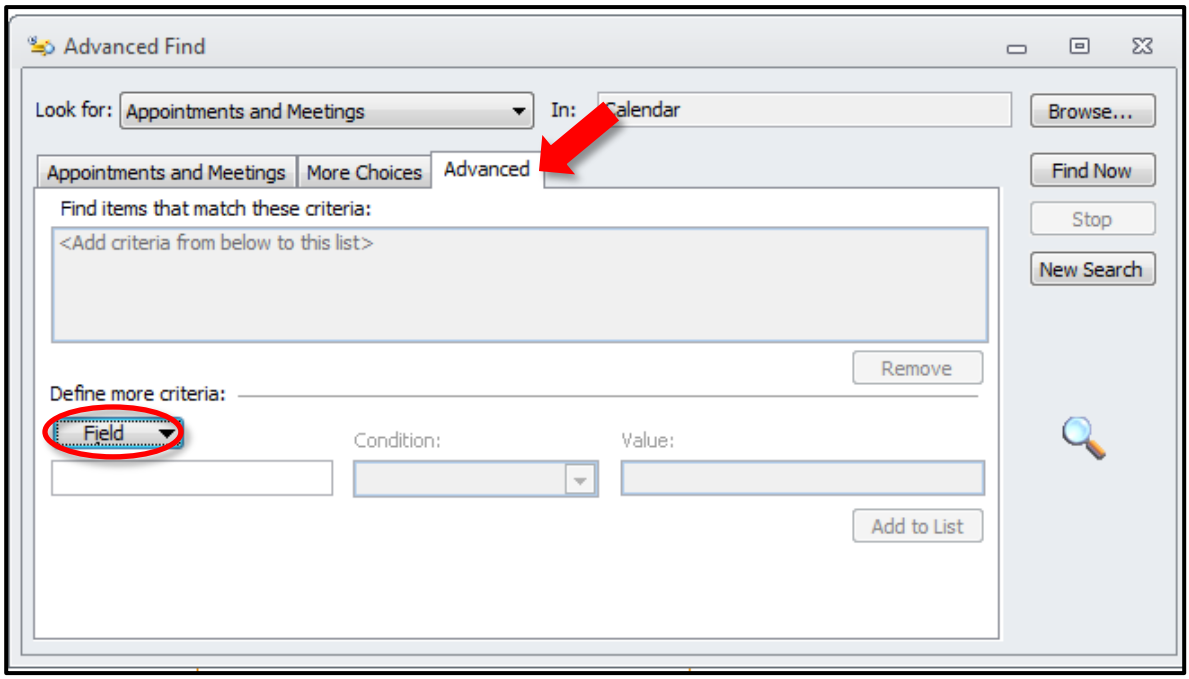
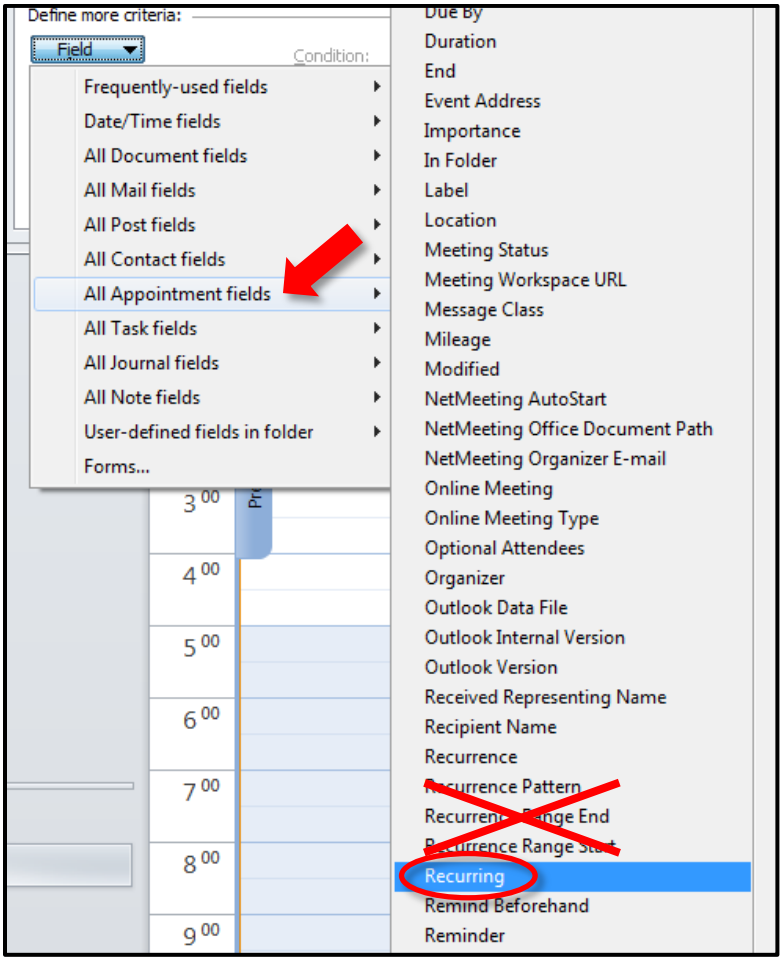
3. Under the **Search** tab, click **Search Tools** to open the **Search Tools** drop-down menu. Select **Advanced Find** to open the **Advanced Find** window.



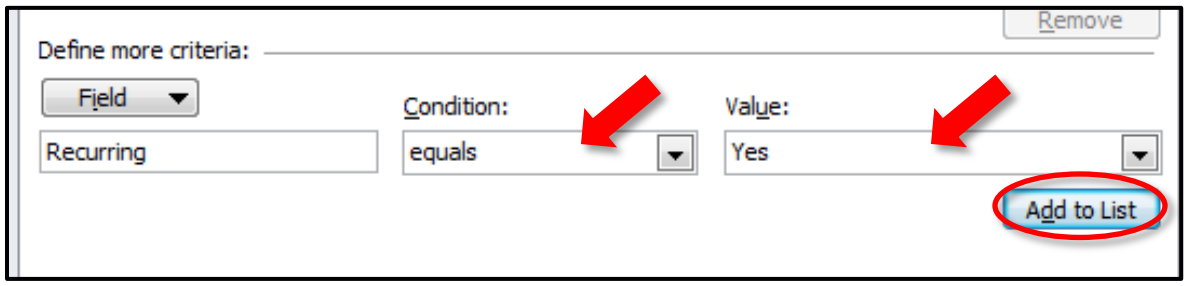
4. Select the **Advanced** tab and then the **Field** drop-down menu in order to set search criteria.



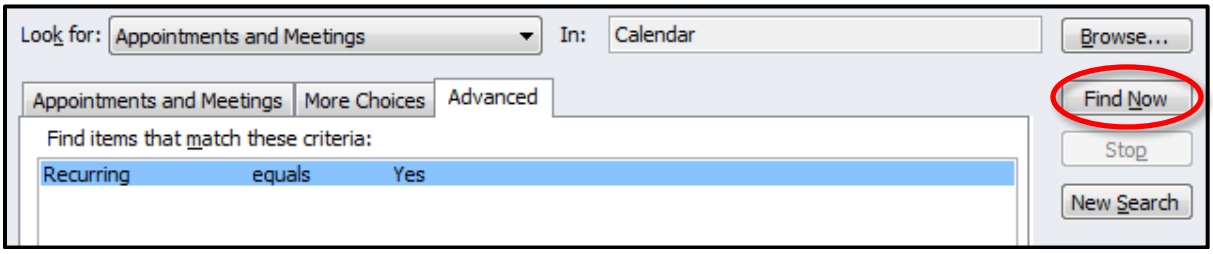
5. Choose **All Appointment fields** and then select **Recurring** from the options presented. Be careful **not** to select **Recurrence**, **Recurrence Pattern**, **Recurrence Range End**, or **Recurrence Range Start**, as they will give less effective results.



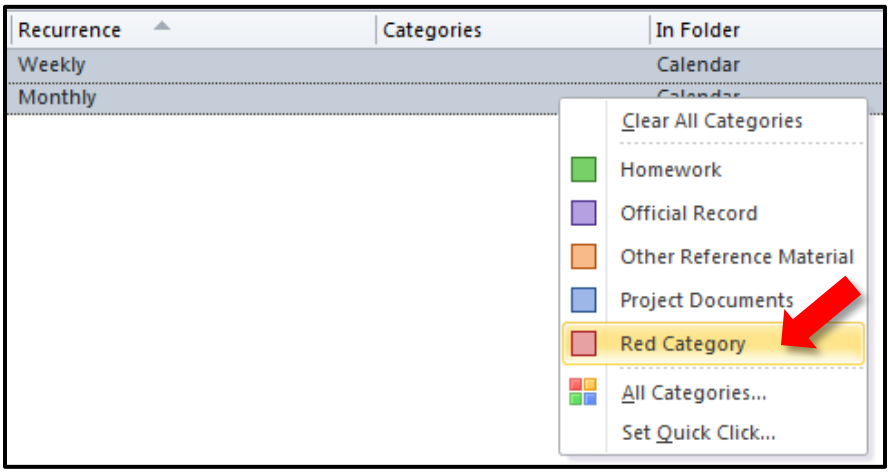
6. Under the **Condition** field**,** select **equals**. In the **Value** field drop-down menu, select **Yes**. Clicking **Add to List** populates the search criteria window.

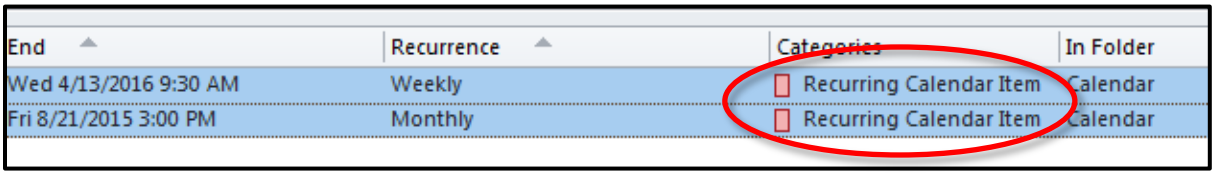


7. Click **Find Now** to execute the search.



8. In the list of search results, select all of the recurring calendar items by pressing Ctrl + A. Right-click under the heading **Categories.** Select an unused category from the menu and rename it *Recurring Calendar Items*. **Use the same category to identify all recurring calendar items.**





9. Ensure that all recurring calendar items are properly categorized before closing the **Advanced Find** window and moving on to *Managing Older Calendar Items*.

Managing Older Calendar Items

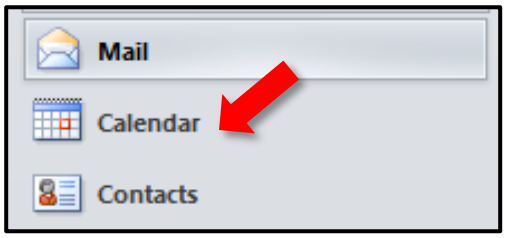
This section explains how to find and remove older calendar items.

Prior to deleting older calendar items, please consider the following:

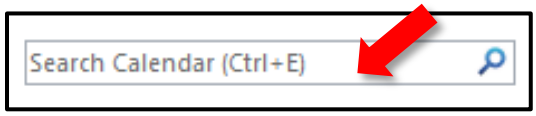
- Do any of the items feature attachments or content that should be retained and filed in official records systems?
- Are there reasons that items should not be deleted? For example, do the items function as reference materials?

Steps

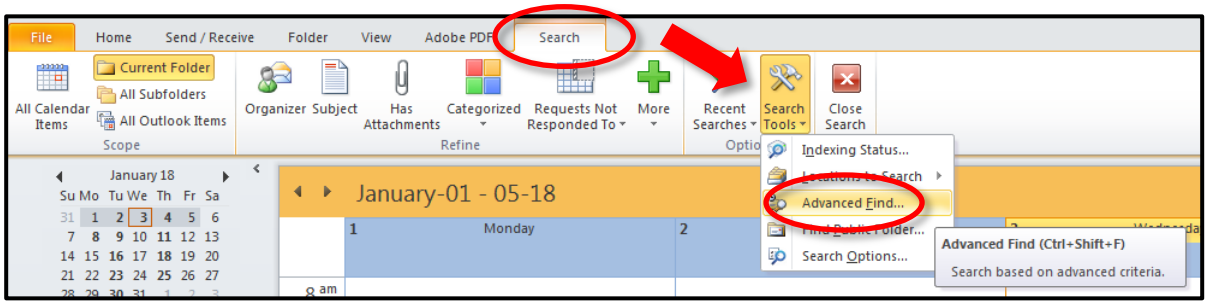
1. From the **Home** tab of Outlook, select **Calendar**.



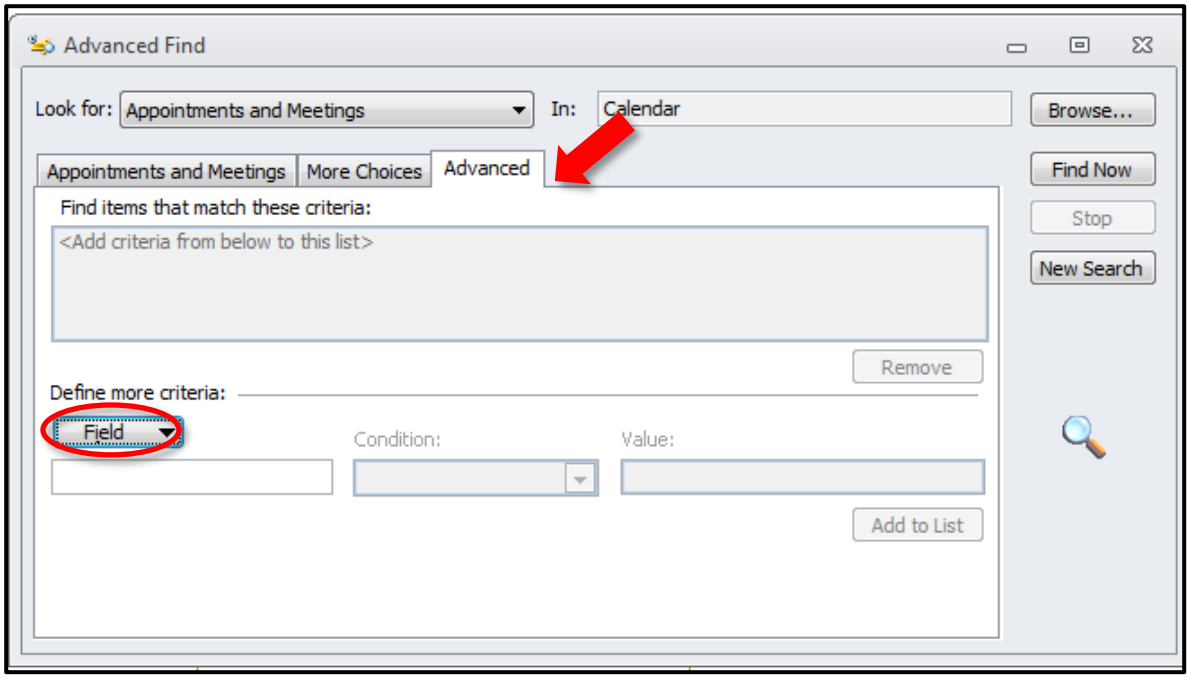
2. Locate the **Search** tool and click inside it.



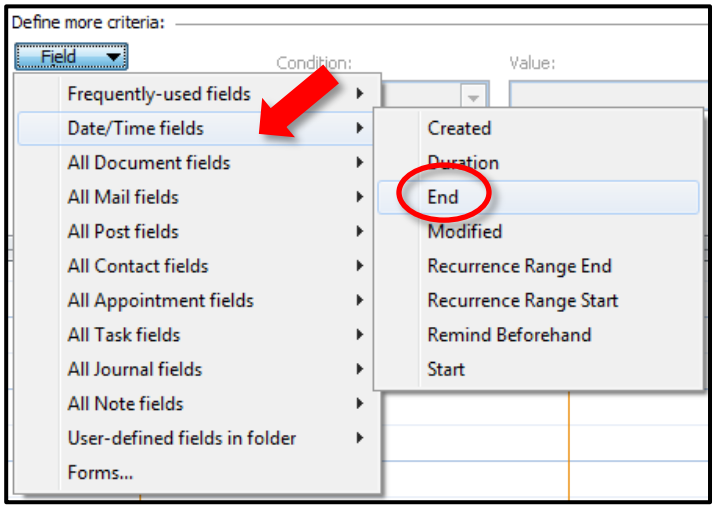
3. Under the **Search** tab, click **Search Tools** to open the Search Tools drop-down menu. Select **Advanced Find** to open the **Advanced Find** window.



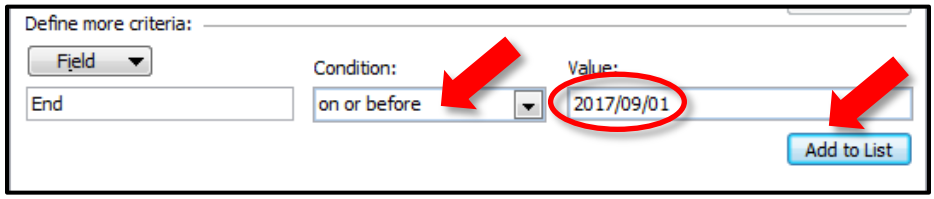
4. Select the **Advanced** tab and then the **Field** drop-down menu in order to set search criteria.



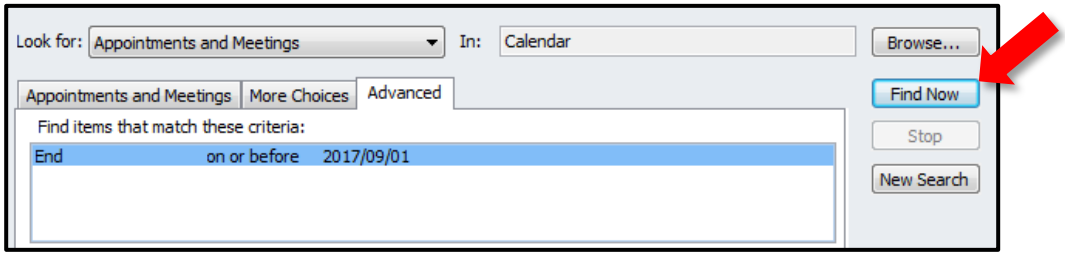
5. Choose **Date/Time fields** and then select **End** from the options presented.



6. Under the **Condition** field**,** select **on or before**. In the **Value** field, type in the end date of the desired search; to display every entry on or before September 1, 2017, enter the value 2017/09/01. **NOTE:** the date formatting in Outlook is **YYYY/MM/DD or MM/DD/YYYY**. Clicking **Add to List** populates the search criteria window.

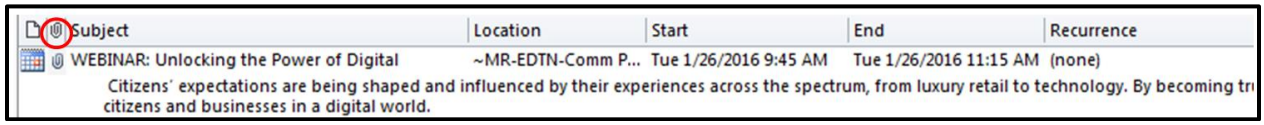


7. Click **Find Now** to execute the search.



8. Before deleting calendar items from the search results, review their contents and any attached files to verify whether they are transitory records. Move any official records to an official records system.

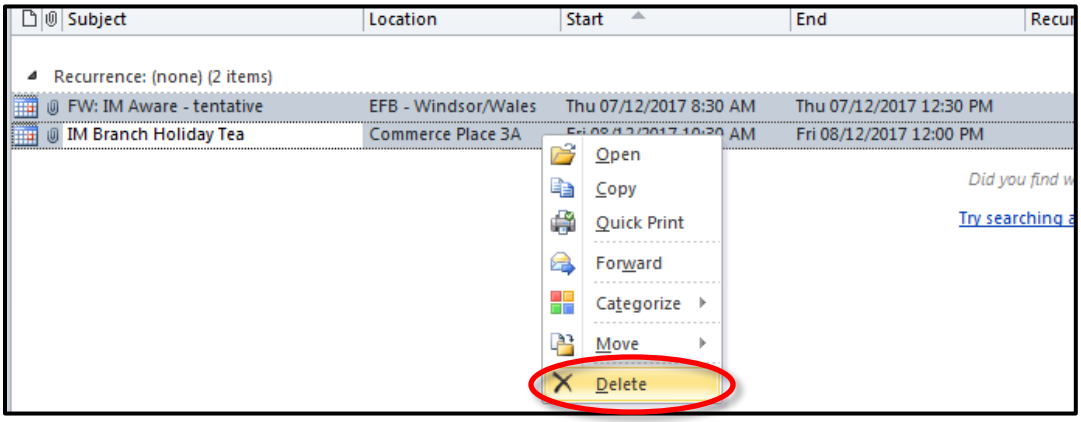
   Items with attachments can be grouped together by clicking on the paperclip icon next to **Subject** at the top of the search results screen. If there is a paperclip next to an item, there is an attachment.



9. From the **Search** results, select any calendar item(s) that have been reviewed and identified as transitory for deletion. Shift + arrow keys allows selection of multiple sequential items; holding down the Ctrl key and clicking allows selection of multiple non-sequential items). It may be useful to click on the different fields (**Subject**, **Location**, **Start**, etc.) to group items together.

   Right-click and choose **Delete** to move selected items into Outlook's **Deleted Items** folder. If there are a large number of items to delete, it may be easier to delete calendar items in small batches.

NOTE: Be careful not to delete any categorized items.



Things to Remember

- Categorizing recurring calendar items protects them from accidental deletion.
- Review any attachments and content before deleting a calendar item.
- Accidentally sending an item to the **Deleted Items** folder does not mean it is gone forever; the item(s) can be retrieved by dragging it back to the folder from which it came.
- If your business area is involved in any FOIP and/or litigation hold activity, please contact your department FOIP coordinator and/or senior records officer before deleting any items.