



CITY OF MADISON INFORMATION TECHNOLOGY

Outlook Calendar Guidelines for Type 2 BCC's

The following is a guide on scheduling a Type 2 meeting in an Outlook Calendar:

Before scheduling in Zoom:

1. As soon as the date and time of the meeting is known, go into the Outlook Calendar.
 - It is recommended that staff post all of the year's regularly scheduled meetings in the Outlook Calendars as soon as possible.
2. In the Outlook Calendar, click "New Appointment."
3. In the **Subject** field enter in the name of your Board, Commission, or Committee (BCC).
4. Click "Scheduling Assistant" on the top task bar.
5. At the bottom of the screen, click "Add Rooms..."
6. Find the name of your designated login (e.g., BCCHost01, BCCHost02, etc.).
7. Double-click the login to add it to the assigned room for the meeting.
8. Once the room is added, you'll see that login's availability for the time you want to schedule the meeting.
9. Do not schedule over any meetings set for the time window you want.
10. Reserve the login for the entire duration your meeting is expected to last.
11. Only one meeting should be scheduled in a time block (i.e., morning, afternoon, and evening).
 - The morning block is any time before noon; the afternoon block is any time between noon and 5 P.M.; and the evening block is any time after 5 P.M.
 - Do NOT schedule 2 hours before or after another meeting using the same login.
12. If there is another meeting scheduled on the designated login during the time you want to schedule your meeting, first try scheduling your meeting for another time.
13. If there is no resolution available, please contact meetingsupport@cityofmadison.com so staff can try to find a resolution to your conflict.
14. Click "Appointment" on the top task bar.
15. Click "Invite Attendees" and add the emails for the members of your BCC and any staff that need to attend.
 - It is recommended to schedule one event as a recurring meeting to make the process go faster. Staff can schedule each meeting individually if they wish to do so. **NOTE:** Only schedule the calendar event in Outlook as a recurring meeting and **NOT** the meeting in Zoom. All BCC meetings in Zoom must be scheduled individually to ensure there is a unique ID for each meeting.
16. Double-check that the information is accurate, then click **Send**.
17. You will receive an automated email stating that your reservation of the login is approved or declined.
18. Send the Date and Time of your meeting to **CL Meetings** to be added to the Clerk's meeting schedule.

After scheduling in Zoom:

1. Go into the Outlook Calendar and double-click on the event you wish to edit.
 - If you scheduled the event as a recurring meeting, select “Just this one” and hit **Ok**.
2. Paste the Zoom meeting invitation (i.e., the meeting URL/link) into the body of the appointment.
3. Click **Send Update** to update the calendar event for all attendees.

After creating and posting the approved agenda:

1. Go into the Outlook Calendar and double-click on the event you wish to edit.
 - a. If you scheduled the event as a recurring meeting, select “Just this one” and hit **Ok**.
2. Paste the link to the agenda on Legistar or attach the agenda to the calendar event.
3. Click **Send Update** to update the calendar event for all attendees.