Title of e-learning
Scheduling Meetings in Outlooks

Course topic
Using Outlook features and email etiquette to schedule meetings.

Need or opportunity
Many employees do not know how to book rooms and use the scheduling assistant in Outlook, which causes unnecessary emails and confusion. I have personally observed this and have had many managers request training on this subject. Branching will be the best solution, because it will give the learner multiple options that are similar to real-life situations. It will also allow them to practice in a safe environment without aggravating co-workers.

Expected learning or performance outcome
Learners will be able to schedule meetings without conflicts.

Relevant characteristics of the target learner audience
- Novice or apprentice Outlook users and business professional
- Primarily use desktop computers
- Vary in age from 18-75
- English-speaking
- Reside in the western United States
- At least a high school diploma
- Motivated and capable to complete e-learning
- Limited access to speakers (need captions)

Environmental analysis
Learners complete their work on desktop computers and/or laptops and are dispersed across a wide geographical area, which makes e-learning is a good fit. The instruction is for computer-based software, so learners can complete simulations similar to how they would in real-life which facilitates knowledge transfer.
Required materials

- Computer
- Speakers (recommended)
- Internet access
- Web browser

Technical requirements

- HTML5
  - Windows: Google Chrome (latest version)
  - Mac: Safari 7 and later, Google Chrome (latest version)
  - Mobile: Safari in Apple iOS 7 and later, Google Chrome (latest version) in Android OS 4.1 and later

Design specifications

Testing/Certification

The learners’ knowledge will be assessed using multiple-choice scenarios. The questions are not scored. The learner must progress through all scenarios to complete the course.

Knowledge and/or skill type

- Actions taken – learners are assessed based on observable behavior on how they schedule meetings.
- Cues used – the learner must review cues from specific areas in Outlook to avoid scheduling conflicts.
- Rules of thumb – learners will write clear subject lines and agendas in order to clearly communicate the purpose of the meeting (Clark, 2013, p. 165).

Learning domains

Interpersonal – the learner must communicate effectively to achieve the goal (Clark, 2013, p. 37).
Assessment strategy (i.e., response options, test items)

The responses have multiple outcomes, high solution precision, limited interface response options, and low social presence (Clark, 2013, Ch. 4). This matches the need the have a realistic response options while interacting on a desktop computer.

Trigger events

Your boss asks you to schedule an important meeting. He stresses the importance of the appointment containing no scheduling conflicts and a clear meeting topic.

Guidance techniques

An on-screen coach will guide learners through the course with simple to complex scenarios. The learner will be directed where to click initially and then asked to pick the right area as the course progresses (Clark, 2013, p. 76).

Advisor type (if any)

The advisor is an on-screen coach/ product expert who guides the learner through the course and provides feedback on decisions.
Branching scenario path (i.e., flowchart)

E-Learning structure/content outline

Introduction
- Title Slide
- Introduction
  - Objectives
- Trigger Event

Calendar
- Julie
- Invite Attendees
  - Calendar Icon
  - Appointment
  - Invite Attendees
  - Ctrl+K
Training design matrix

Introduction

- **Scope statement**: The Introduction will familiarize learners with what the course will cover.
- **Terminal Learning Objective (TLO)**: Learners will understand the course objectives.
- **Enabling Learning Objectives (ELO)**:
  - Identify objectives
  - Explain objectives

- **Lesson Topics**:
  - Title Slide
  - Introduction
    - Objectives
  - Trigger Event

Calendar

- **Scope statement**: This course will explain how to use the meeting scheduling features of Outlook, and best practices for scheduling meetings.
- **Terminal Learning Objective (TLO)**: Learners will schedule meetings with clear subject lines and agendas, without conflicts.
- **Enabling Learning Objectives (ELO)**:
  - Identify scheduling conflicts.
  - Reserve meeting rooms.
  - Utilize the scheduling assistant.
• **Lesson Topics:**
  o Julie
  o Invite Attendees
    ■ Calendar Icon
    ■ Appointment
    ■ Invite Attendees
    ■ Ctrl+K
  o Subject Line
    ■ Details
  o Reserve Rooms
    ■ Rooms…
  o Schedule
    ■ Length
    ■ Show As
    ■ Reminder
    ■ Scheduling Assistant
      ● Date and Time
  o Message
    ■ Agenda
  o Review
  o Thank you

• **Instructional Strategy:** The content will be presented in an interactive e-learning course with learner activities, including practical exercise. An on-screen coach will guide learners through the course with simple to complex scenarios. The learner will be directed where to click initially and then asked to pick the right area as the course progresses (Clark, 2013, p. 76). The learner is given both intrinsic and instructional feedback. The email responses are a realistic environmental response, while also guiding them to a suggested alternative action (Clark, 2013, p. 106).

• **Assessment Strategy:** The learner will be given five scenario questions. The outcome is factual and conceptual knowledge, as well as near transfer open tasks (Clark, 2013, p.126-127). The learner must be able to correctly navigate in the Outlook screen, as well as create clear subject lines and agendas. The questions are not scored.
Estimated contact time

Introduction

- **Intro/Summary/Objective (min.):** 2 slides, 1 minute
- **Content (min.):** 1 slide, 1 minute
- **Total Screens/Minutes:** 3 screens, 2 minutes

Calendar

- **Intro/Summary/Objective (min.):** 2 slide, .5 minute
- **Content (min.):** 6 slides, 6 minutes
- **Knowledge Check (KC)/Practical Exercises (PE) (min.):** 4 slides, 8 minutes
- **Total Minutes:** 12 slides, 14.5 minutes
<table>
<thead>
<tr>
<th>Screen #</th>
<th>Screen Type</th>
<th>Screen Title</th>
<th>Reviewer Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1</td>
<td>Title</td>
<td>Scheduling Meetings</td>
<td>Reviewer 1</td>
</tr>
</tbody>
</table>

**Visuals (Video/Pics/Characters)**

Background picture fills entire screen (OfficeMeeting.jpg).
Small Decorative graphic with company colors/shapes.

**Onscreen Text**

Title – Scheduling Meetings

**Animation & Interactivity**

Next button

**Audio (if any) or additional onscreen text**

None

**Navigation/Branching**

Next button: next slide

**Additional Notes**

Adapted by Giacumo, L. A. from templates Source:
http://thelearningcoach.com/resources/storyboard-depot/
# Introduction

This course will familiarize you with scheduling appointments in Microsoft Outlook.

By the end of this course, you will be able to:

- reserve a meeting room
- invite attendees without schedule conflicts
- setup a meeting without errors

## Animation & Interactivity

- Fade in text
- Next button
| Screen # | Screen Type | Screen Title | Visuals 
(Video/Pics/Characters) | Onscreen Text |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.3</td>
<td>Trigger</td>
<td>Email Trouble</td>
<td>Boss.jpg, OfficeBackground.jpg</td>
<td>Umm... yeah. I’m going to need you to schedule a meeting with Samir and Peter. Samir is very particular about meetings. Don’t aggravate him with scheduling conflicts and unclear appointments. We need him to buy-in to this project.</td>
</tr>
</tbody>
</table>

**Audio (if any) or additional onscreen text**

Umm... yeah. I’m going to need you to schedule a meeting with Samir and Peter. Samir is very particular about meetings. Don’t aggravate him. We need him to buy-in to this project.
**Project Title:** Scheduling Meetings in Outlook  
**Module Title:** Calendar

<table>
<thead>
<tr>
<th>Screen #</th>
<th>Screen Type</th>
<th>Screen Title</th>
<th>Reviewer Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.1</td>
<td>Scenario</td>
<td>Julie</td>
<td>Reviewer 1</td>
</tr>
</tbody>
</table>

**Visuals**  
(Video/Pics/Characters)

Screenshot of Outlook. Character on the left [welcoming pose]. Text bubble above character.

**Onscreen Text**

Hello! I’m Julie. Let’s get started!

**Animation & Interactivity**

**Audio (if any) or additional onscreen text**

Hello, I’m Julie. I’ll be your guide during this Outlook Basics course. If you need help, click on the (?) mark icon on the bottom left. If you need to navigate back to the start, click the Home text in the breadcrumb above me. Let’s get started! Click Next.

**Navigation/Branding**

- **Next button:** next slide  
- **Question marker:** lightbox help window  
- **Breadcrumb:** links to Introduction  

**Additional Notes**

Adapted by Giacumo, L. A. from templates Source:  
http://thelearningcoach.com/resources/storyboard-depot/
### Content Slide

<table>
<thead>
<tr>
<th>Project Title</th>
<th>Module Title</th>
<th>Screen Type</th>
<th>Screen Title</th>
<th>Reviewer Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scheduling Meetings in Outlook</td>
<td>Calendar</td>
<td>Scenario</td>
<td>Calendar</td>
<td>Reviewer 1</td>
</tr>
</tbody>
</table>

#### Visuals

(Video/Pics/Characters)

Character [points to icon].

#### Onscreen Text

Click on the Calendar icon.

#### Animation & Interactivity

Red box around calendar icon in Outlook [grow animation] [Hotspot].

#### Additional Notes

Audio *(if any)* or additional onscreen text

[Conversational] Your boss needs you to schedule a meeting with Peter and Samir. Click the calendar icon to begin the process.

<table>
<thead>
<tr>
<th>Navigation/ Branching</th>
<th>Hotspot: next slide</th>
<th>Question marker: lightbox help window</th>
<th>Breadcrumb: links to Introduction</th>
<th>Additional Notes</th>
</tr>
</thead>
</table>

### Visuals
*(Video/Pics/Characters)*

Outlook on calendar view. Character [gesturing to the date].

### Onscreen Text

**Schedule an appointment for July 25.**

### Animation & Interactivity

Red box around July 25 [grow animation] [Hotspot].

### Audio *(if any)* or additional onscreen text

The meeting needs to occur the week of the 23rd. Let’s see if July 25th will work for everyone. Double click on July 25th.
<table>
<thead>
<tr>
<th>Project Title</th>
<th>Scheduling Meetings in Outlook</th>
<th>Module Title</th>
<th>Calendar</th>
<th>Screen #</th>
<th>2.4</th>
<th>Screen Type</th>
<th>Scenario</th>
<th>Screen Title</th>
<th>Invite Attendees</th>
<th>Reviewer Notes</th>
</tr>
</thead>
</table>

### Visuals
*Video/Pics/Characters*

Outlook – appointment window. Character [gesturing to the icon].

---

### Onscreen Text

Invite Attendees since this is a meeting.

---

### Animation & Interactivity

Red box around Invite Attendees icon [grow animation] [Hotspot].

---

### Audio (if any) or additional onscreen text

Since this will be a meeting and not just a personal appointment, we need to invite Peter and Samir. Click the Invite Attendees icon.

---

### Navigation/Branding

- **Hotspot:** next slide
- **Question marker:** lightbox help window
- **Breadcrumb:** links to Introduction

### Additional Notes

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**Project Title:** Scheduling Meetings in Outlook  
**Module Title:** Calendar

**Screen #** 2.5  
**Screen Type** Scenario Choice

**Screen Title** Ctrl+K

**Visuals**  
*(Video/Pics/Characters)*

Outlook – appointment window. Character [good idea].

**Onscreen Text**

Use Ctrl+K to auto-fill or search for a name.

**Animation & Interactivity**

Red box on To... field [grow animation] [Hotspot].

---

**Audio (if any) or additional onscreen text**

You can click the TO... button to search for Peter and Samir in the company directory, or you can start typing their names in the field next to it. Ctrl+K is a shortcut key to search for a name. If there is only one option, the name will auto-fill. If there are multiple names, a window with those options will open for you to choose from. If you regularly email certain people, their names will be suggested when you start typing their name. Let’s try finding Peter. Type Peter and then press Ctrl +K.

---

**Navigation/Branching**

Hotspot: next slide  
Question marker: lightbox help window  
Breadcrumb: links to Introduction

**Additional Notes**
Onscreen Text
Drag and drop the appropriate message into the subject line.

Audio and/or link to image assets
What do you think is the most appropriate subject line? Drag and drop your choice into the Subject Line.

Question Stem
Drag and drop the appropriate message into the subject line.

1. Let’s Meet!
2. Review Cover Letters on TPS Reports
3. TPS Reports

Choice 1 Feedback
Image of email back from Samir tentatively accepting: “What is this meeting about? I don’t have time for this nonsense!”

Choice 2 Feedback
Great choice! This tells the attendees exactly what the meeting is about.

Choice 3 Feedback
Good start! A little more information might be helpful to prepare the attendees for the meeting.
Drag and drop the appropriate action into the Location field.

Audio and/or link to image assets
Now you need to select a location for your meeting. There is a conference room down the hall you usually use called Olympus. Drag and drop the appropriate place into the location field.

**Question Stem**
Drag and drop the appropriate action into the Location field.

**Answer Options (**bold** correct)**
1. Type: 1st floor conference room
2. Type: Olympus
3. Click Rooms…

**Choice 1 Feedback**
**Media:** Image of email - Peter responds with, “Is this the Olympus or Nebo meeting room?”
**Audio:** There may be more than one conference room on the first floor, so attendees may not know where to go. This also won’t reserve the room, so someone may be using it when you arrive.

**Try Again button:** close layer

**Choice 2 Feedback**
**Media:** Image of meeting room full of people [large image covers Outlook].
**Audio:** When you get to the room there are already people in it. They show you that they have the room reserved for this time. Now you have to hunt for an open room.

**Try Again button:** close layer

**Choice 3 Feedback**
**Media:** Screenshot of room scheduler [fill half of screen].
**Audio:** Great choice! This will give you a full list of all the conference rooms and it will ensure you reserve it correctly.
<table>
<thead>
<tr>
<th>Project Title</th>
<th>Scheduling Meetings in Outlook</th>
<th>Module Title</th>
<th>Calendar</th>
</tr>
</thead>
<tbody>
<tr>
<td>Screen #</td>
<td>2.8</td>
<td>Screen Type</td>
<td>Scenario</td>
</tr>
<tr>
<td>Screen Title</td>
<td>Schedule</td>
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<td></td>
</tr>
<tr>
<td>Reviewer Notes</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Screen #2.8**

**Screen Title:** Schedule

**Visuals**
(Video/Pics/Characters)

Character [asking question].

**Onscreen Text**

Is this an all-day meeting?

**Animation & Interactivity**

Red box around Date and Time in Outlook [grow animation] [Hotspot].

**Audio (if any) or additional onscreen text**

No one wants to talk about TPS reports all day. Uncheck “all day event”. This meeting just needs to be half an hour long.

**Navigation/Branching**

Hotspot: show layer on click
Question marker: lightbox help window
Breadcrumb: links to Introduction

**Additional Notes**

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Danielle Dale
OPWL 551
Spring, 2019
### Content Slide

<table>
<thead>
<tr>
<th>Project Title</th>
<th>Module Title</th>
<th>Screen Type</th>
<th>Screen Title</th>
<th>Reviewer Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scheduling Meetings in Outlook</td>
<td>Calendar</td>
<td>Scenario</td>
<td>Schedule</td>
<td></td>
</tr>
</tbody>
</table>

#### Screen # 2.8.1

**Screen Title:** Schedule

**Visuals**

*(Video/Pics/Characters)*

Character [asking question].

**Onscreen Text**

*Is this an all-day meeting?*

**Animation & Interactivity**

Red box around Show As and Reminder [grow animation] [Hotspot].

---

**Audio (if any) or additional onscreen text**

Notice when you change it from an all-day event, it changes the appointment to show as busy and sets a 10-minute reminder. It’s a good practice to double check these items are selected correctly before sending an appointment. If there is no reminder - people may forget to leave for it on time or it shows as “free” other people may book over the top of it.

---

**Navigation/Branching**

- **Hotspot:** next slide
- **Question marker:** lightbox help window
- **Breadcrumb:** links to Introduction

**Additional Notes**

What time is the meeting?

1. Select a time that works best for you and see what they respond back with
2. Send them a separate email or call them to find out
3. **Check the Scheduling Assistant**

**Choice 1 Feedback**
Media: Image of emails from Peter and Samir responding:
Text: Peter “I don’t think I’ll be in the office until 10:00a.m. Can you push this meeting back to 10:30... or never” Samir: “I have a meeting already scheduled at this time. My calendar is up to date with my availability. Check the scheduling assistant when you reschedule this.”

**Choice 2 Feedback**
Media: Image of email from Samir responding:
Text: Samir “My calendar is up to date with my availability. Check the scheduling assistant”.

**Choice 3 Feedback**
Media: Screenshot of scheduling assistant window.
Audio: Great choice! This will show you the attendee’s and the room availability. It’s a best practice to make sure your calendar is blocked out when you are busy, so people know not to schedule meetings during that time.
### Quiz Slide

<table>
<thead>
<tr>
<th>Project Title</th>
<th>Module Title</th>
<th>Reviewer Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scheduling Meetings in Outlook</td>
<td>Calendar</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Screen #</th>
<th>Quiz Type</th>
<th>Quiz Title</th>
<th>Reviewer 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.10</td>
<td>Yes/No</td>
<td>Message</td>
<td></td>
</tr>
</tbody>
</table>

**Onscreen Text**

Is it ready to send?

**Audio and/or link to image assets**

Look over the meeting invite. Does it look like it’s ready to send?

#### Question Stem

Is it ready to send?

#### Answer Options (bold correct)

1. Yes
2. No

#### Choice 1 Feedback

**Media:** Red box around message area [grow animation].

**Audio:** You could send it this way. Many people do, but a best practice is to write more information about the meeting in the body of the message.

#### Choice 2 Feedback

**Media:** Red box around message area [grow animation].

**Audio:** Right! This invite could use more information in the body of the message. This will allow the attendees to be more prepared with what you will cover in the meeting. Let them know if there’s anything specific you need them to come prepared with. Or list a meeting schedule to make sure you stay on topic and cover the items you need to discuss.

#### Navigation/Branching

Submit: show feedback

Continue: advances to next slide

**Additional notes**

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## Content Slide

<table>
<thead>
<tr>
<th>Project Title</th>
<th>Module Title</th>
<th>Calendar</th>
<th>Reviewer Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scheduling Meetings in Outlook</td>
<td>Calendar</td>
<td>Message</td>
<td>Reviewer 1</td>
</tr>
</tbody>
</table>

### Screen 

**Screen #**: 2.11  
**Screen Type**: Scenario

### Visuals

*(Video/Pics/Characters)*

Red caption for things to review. Character [smiling]

### Onscreen Text

**Review and hit send!**

**Things to Review:**
1. Attendee names
2. Subject line
3. Room
4. Dates and times
5. Show as busy with reminder
6. Scheduling assistant
7. Message or agenda

### Animation & Interactivity

Red box around send [grow animation] [Hotspot].

### Audio (if any) or additional onscreen text

It’s a best practice to quickly review all the meetings items to make sure everything is accurate before hitting send.

### Navigation/Branching

**Hotspot**: next slide  
**Question marker**: lightbox help window  
**Breadcrumb**: links to Introduction

### Additional Notes

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<table>
<thead>
<tr>
<th>Project Title</th>
<th>Scheduling Meetings in Outlook</th>
<th>Module Title</th>
<th>Thank You</th>
<th>Reviewer Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Screen #</td>
<td>2.12</td>
<td>Screen Type</td>
<td>Intro</td>
<td>Reviewer 1</td>
</tr>
<tr>
<td>Screen Title</td>
<td>Thank You</td>
<td>Screen Title</td>
<td>Thank You</td>
<td></td>
</tr>
<tr>
<td><strong>Visuals</strong></td>
<td>(Video/Pics/Characters)</td>
<td><strong>Onscreen Text</strong></td>
<td>Thank you for completing this course. You may now close this window.</td>
<td></td>
</tr>
<tr>
<td>Character [thumbs up].</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Audio (if any) or additional onscreen text</strong></td>
<td>Thank you for completing this course. You may now close this window.</td>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>

**Navigation/Branching**
- Retry button: jump to Title Slide

**Additional Notes**
- Adapted by Giacumo, L. A. from templates Source:
  http://theelearningcoach.com/resources/storyboard-depot/
Introduction

Body copy
Thank you for completing this course!