**TASBO Master Calendar 21-22**

**Importing an Excel to an Outlook Calendar**

**Customize the Excel file – TASBO has created the Excel file template with the data fields highlighted below:**

1. Review and edit YOUR Master Schedule template as appropriate
* Subject\* – This is what your appointment will appear as on your Outlook calendar. A department has been substituted for Subject in the TASBO template.
* Location – This is the location of the appointment. Default is “Office” – can be edited
* Start Time – preset to 7:30 am to 8:00 am before your workday appointments typically begin (can be changed)
* Start Date\*
* End Time
* End Date\*
* All Day Event – This is a yes or no answer.
* Reminder On/Off – This is a yes or no answer.
* Reminder Date
* Reminder Time
* Categories – This is the appointment category.
* Description – Details of the task or report due
* Private – This is a Yes/No flag to determine if anyone else can see this event.
* Sensitivity

\*Required fields

1. Filter the Excel file as needed to include or exclude specific subjects (departments). For example, a PEIMS department staff member may choose to filter and use only the PEIMS category. However, a CFO or Business Manager in a small district may choose to keep all departments for oversight.
	1. Two step process:
		1. Set the Excel filter function, check off all items that you don’t need and delete them
		2. Turn off the filter function and you should have the items that you want to import and save the updated file.
2. Save the final Excel file as a CSV Comma Delimited file (.csv extension)

**Import the CSV file**

1. Click on “File” menu in Outlook and select “Open & Export”, “Import/Export”. An import and export dialogue box should pop up.
2. Select “Import from another program or file”. Click Next
3. Select “Comma Separated Values” and click Next.
4. Select file to import. Click on the “Browse” button and find the “Master Calendar 21-22 Outlook Import” or appropriate file name if you renamed a filtered copy of the Master Calendar
5. Select one (1) option:
	1. Replace duplicates with items imported
	2. Allow duplicated to be created
	3. Do not import duplicate items
6. Select Destination folder – Select appropriate Calendar.
7. Next screen confirms the actions to be performed, if okay, select Finish
8. Search for some of the Master Schedule deadlines to ensure that the import was successful