# Outline

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## Sharing your calendar

There are two ways to share your Outlook calendar.

1) Use the "Share My Calendar…" feature under the Calendar navigation area.
2) Assign a Delegate to your calendar.

### What is the difference between sharing your calendar and giving someone delegate rights?

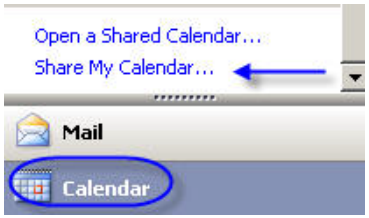
If you need to have someone else receive and accept meeting related requests for you **OR** send messages on your behalf, you need to use the Delegate feature.

Otherwise, all other calendar features (viewing, creating appointments, etc), are able to be done no matter which way you share your calendar.

## Share your calendar

Click on the Calendar icon as circled below. You will see a prompt to choose Share My Calendar

***Click Share My Calendar…***

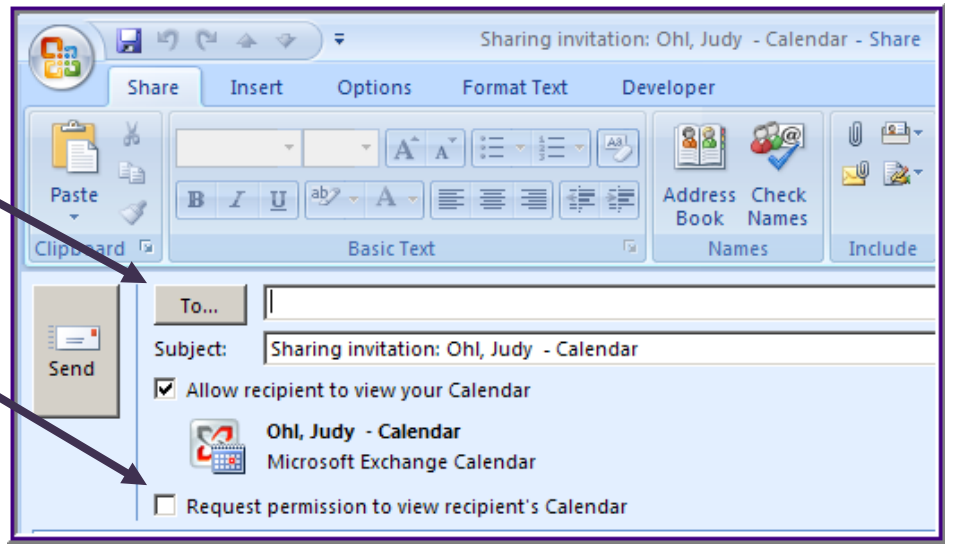



The following window will appear.

Use the To…. Button to find a person in the global address book who you wish to share your calendar with.

Note – you may also request permission to view that person's calendar by placing a checkmark in this field.

Click Send when ready.




## Permission rights for shared calendars

When you share a calendar, by default the other person receives "reviewer" permission…they may read items but cannot put items on your calendar.

## Understanding permission levels

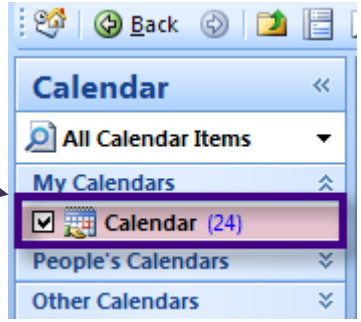
***Owner*** -- Create, read, modify, and delete all items and files; create subfolders; set permissions for other people to access the folder.
***Publishing Editor*** -- Create, read, modify, and delete all items and fields; create subfolders.
***Editor*** -- Create, read, modify, and delete all items and files.
***Publishing Author*** -- Create and read items; modify and delete own items, create subfolders.
***Author*** -- Create, read, modify, and delete own items and files.
***Non-editing Author*** -- Create and read items, delete own items.
***Reviewer*** -- Read items.
***Contributor*** -- Create items and files. This allows users to drop items in a folder but not read them after they are dropped.
***None*** -- Grants no permission.

## How to change permission level

Open the calendar navigation area if you are not already in that area.

Right click on the entry that says Calendar under My Calendars.

Choose Properties.

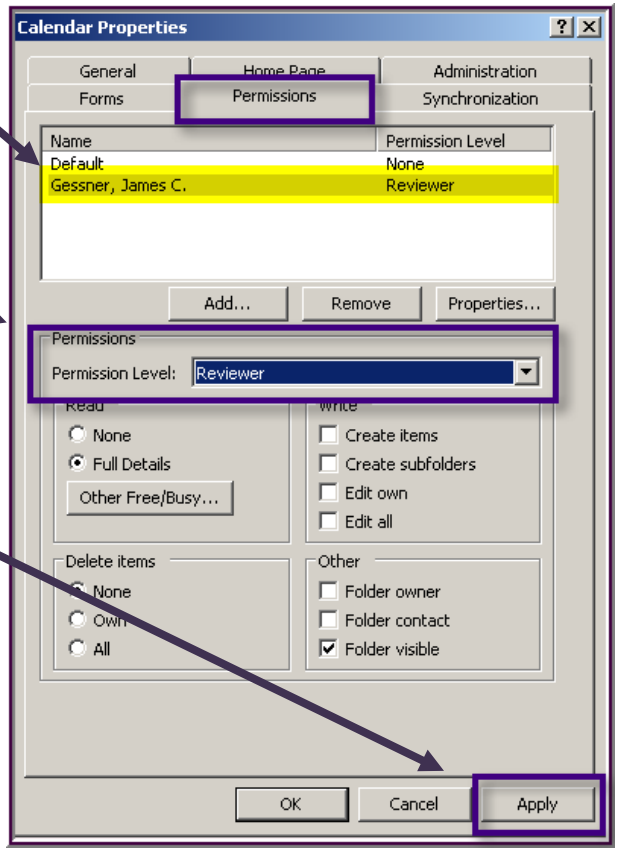


When the Properties window opens, choose the Permissions tab.

Highlight the person's name who you shared your calendar with.

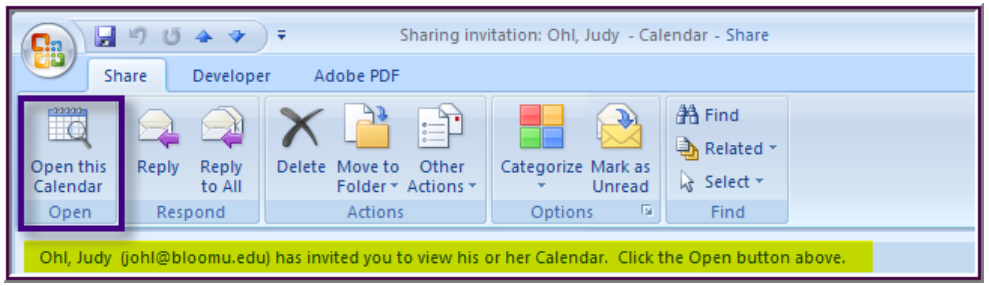
Their permission level will show in the box beneath their name. Change permissions if you wish.

Click Apply if you've made changes.




## When you receive permission to view someone's calendar

The person will receive an email notifying them that you have shared your calendar with them. It provides instruction and a link to open the calendar. Once the calendar has been opened it will appear under the heading "People's Calendars" when you go to the Calendar navigation area.

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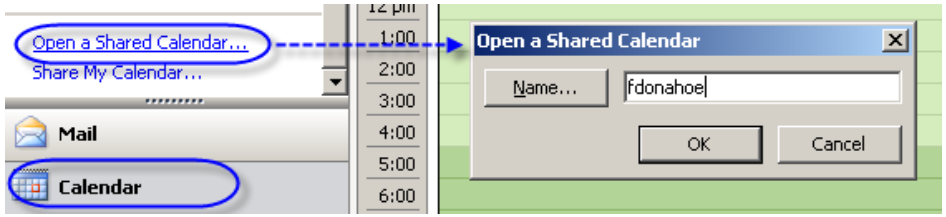
### Another option for opening a shared calendar

You may click on the line Open a Shared Calendar. The "Open a Shared Calendar" window will appear. Either type that person's user name in the white field or click on the Name button to find that person in the Outlook address book.




Click ok and you will be able to view that person's calendar.

### Remove a shared calendar

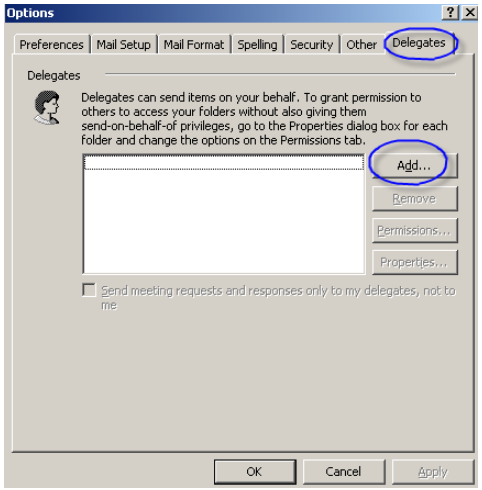
Right click on a calendar you wish to remove from Other Calendars and choose "Remove from other calendars."

## Assigning delegate permissions

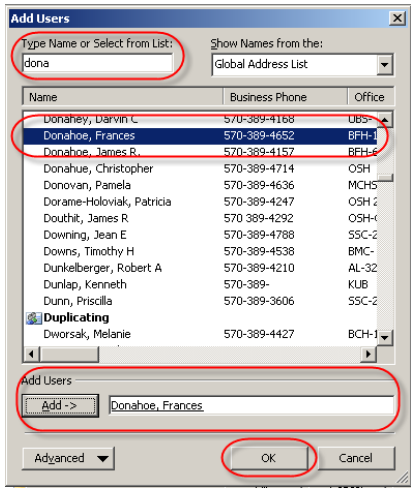
You may assign someone as a delegate if you need someone to receive and accept meeting related requests for you…or if you need someone to send messages on your behalf.

Follow these steps to assign someone as your delegate.

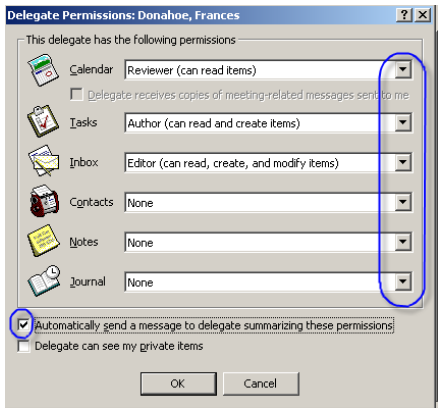
Click Tools – Options. Choose the Delegates tab as illustrated below: Click Add button which will open the address book.




This screen appears:




***The next window is where you assign permission levels***



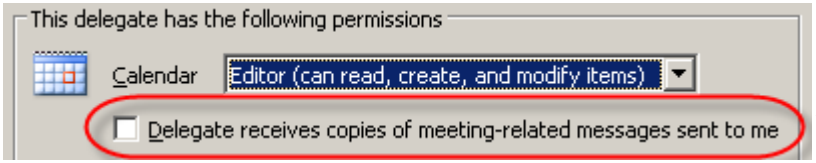

Click the drop down arrow next to each main heading to choose the level of responsibility you wish to delegate. ***If you only wish them to view your calendar, only set a default in that area.***

Checkmark the box in front of "automatically send a message to delegate summarizing these permissions" so that person is notified of the permissions. They will receive an email, complete with instruction on how to open your folder.

Only checkmark the "private items" line if you wish to provide your delegate the ability to view private items on your calendar.

## Note on Editor Permissions

If you assign someone as an Editor to your calendar, putting a checkmark in "Delegate receives copies of meeting-related messages sent to me" will send copies to that delegate.



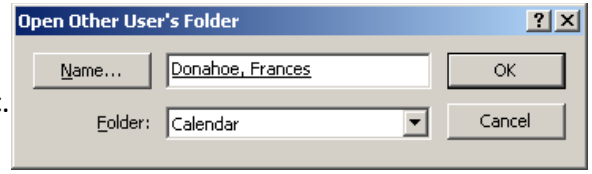

**Important!** If a person has 2 or more delegates we recommend that only one handles the meeting related messages!! Otherwise there can be overlap problems (ie., one person accepts meeting; another deletes, so it would take off the previously accepted meeting.)

## Opening a calendar after being assigned a delegate

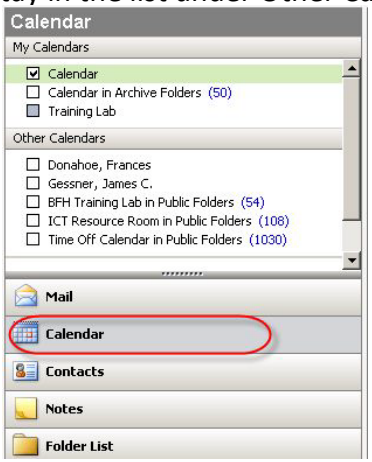
Once you've been given the permissions to access another user's information in Outlook, you would open as follows:

- Click on File
- Click on Open – Other User's Folder
- Use the Name… button to search for the person's name
- Use the drop down area next to Folder to specify what folder (Inbox, Calendar, etc.

  ***Note:*** If you try to open a folder you were not give permission to view, you will receive an error message.




- After opening a calendar, you will see that person's name listed under "Other Calendars" – put a checkmark in the box next to a person's name to view their calendar. That name will stay in the list under Other Calendars.

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## Deleting a calendar in your other calendars view

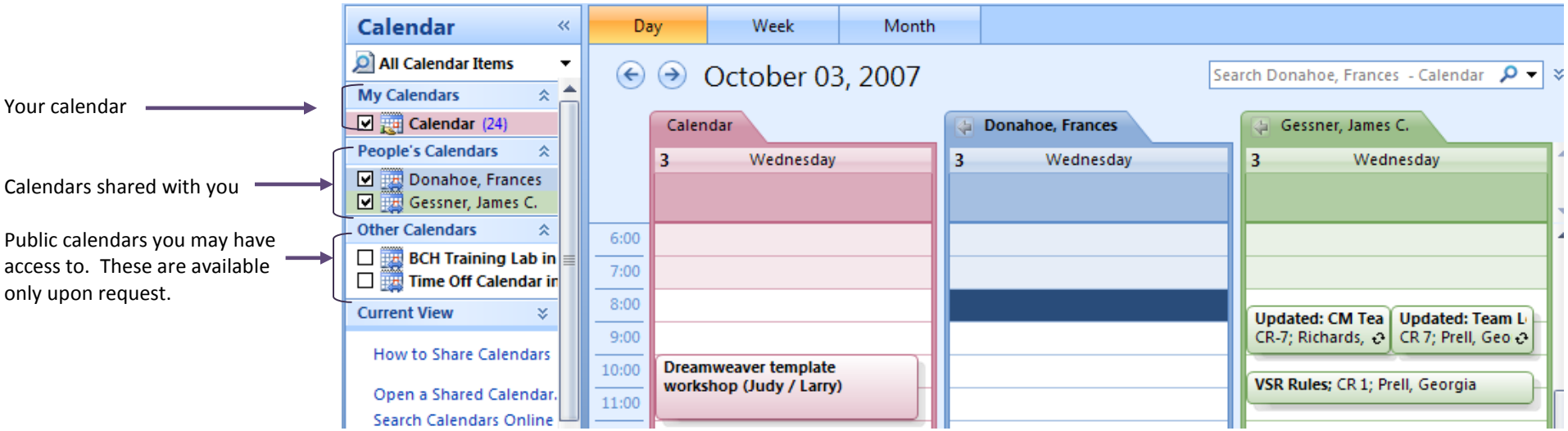
If you no longer need to view a person's calendar that you have delegate rights to, right click on their name and choose **"Delete (name of person)"** – they will be gone from your Other Calendars list.

## Deleting delegate permissions

Delete delegate permissions by clicking Tools-Options-Delegates. Highlight the person and choose Remove.

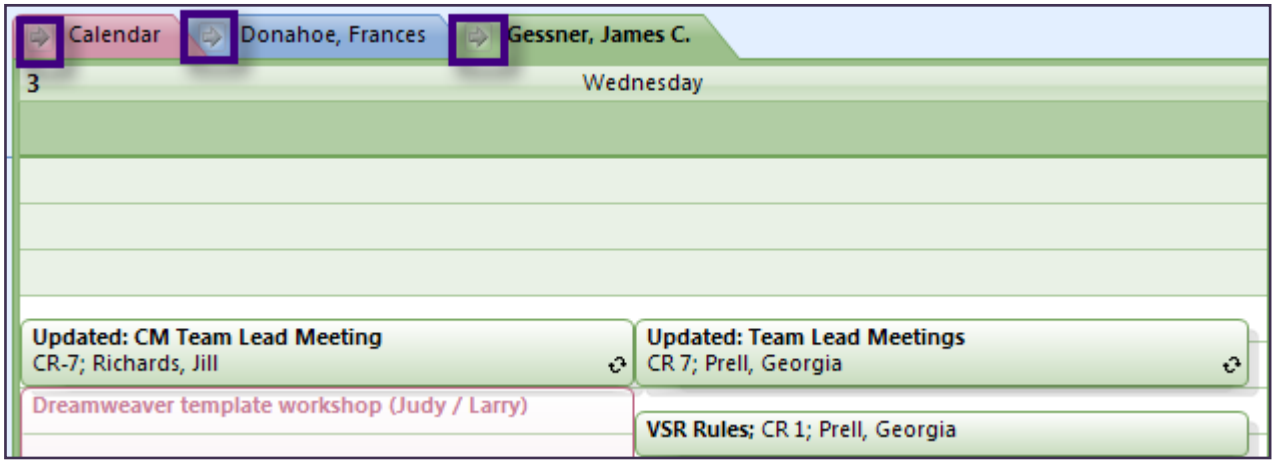
## View calendars side by side

If you have been granted delegate rights to several calendars, once they are open under the "Other Calendars" area of Outlook, you will be able to view these side by side by simply placing a checkmark next to those you wish to view. Example below:



## Overlap calendars

Click on the arrow symbol on each persons calendar to see them in overlap mode…click arrow again to take back to side-by-side mode.

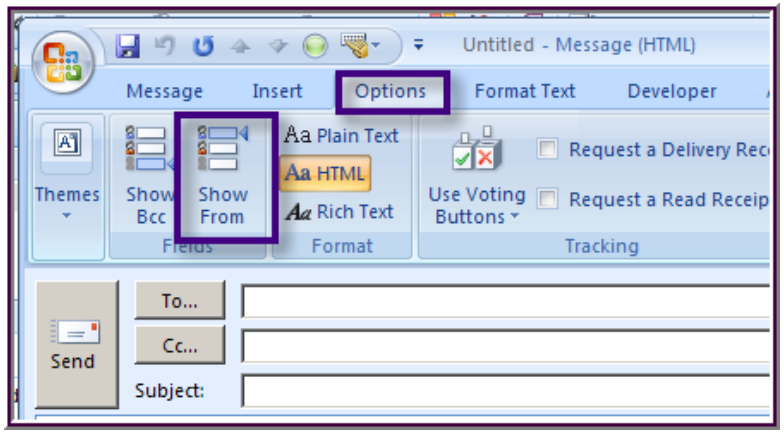



## Sending a message on behalf of someone

**You must be assigned as a delegate of the Inbox, Tasks or Calendar with Author or Editor level permissions in order to send a message on behalf of someone. Once that is in place, send a message on behalf of someone using the following steps.**

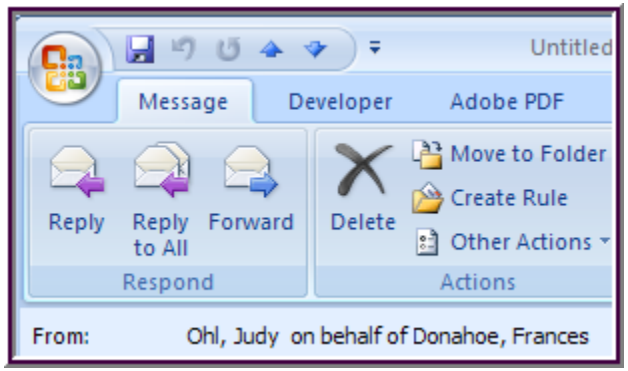
Create a new email message.

Using the Options ribbon, click the "Show From" button so you will see a From button (directly above the To) button.



Click on the From button. Using the address book, find the person you wish to send the message for.

Fill in the rest of your message detail and click Send. This is how the From field appears once sent:




Note: The person who created the message will have a copy of it in their Sent Items. The person they sent it for will not.

***Tip: The next time you create a new message it will still have the From field showing. Click View-From Field to close it!***

## Conditions where this feature will not work

- This feature will **not** work if you are trying to send a message on behalf of someone who is **not** a university employee.
- This feature will **not** work across computer platforms, i.e., both the individual and their delegate must be working on the Windows operating system. If one person is a Mac user and one person is a Windows user, it will not work.