Setting Editor/Delegate Permissions and Best Practices for Using Them

To avoid confusion, follow these best practices in regard to delegate and editor permissions:

- Have ONE person manage your calendar, either you OR your delegate, but NOT both.
- Limit the number of people with Editor permissions to your calendar.
- If you need multiple delegates, configure only one delegate and then grant Editor permissions to the additional people.
  Do not have multiple delegates receive meeting email messages.

Editor Permissions

If you give an individual editor permissions, they can create, read or modify meetings on your behalf. They will not receive meeting requests or cancellations for you through email. Thus, they can only accept or decline meetings for you by opening your calendar. To do this, follow the steps below.

**Note:** You will receive an email notification for each meeting request that an editor processes on your behalf. If this is undesirable, consider granting Delegate permissions instead (see below).

1. From Calendar view.
2. On the Home tab, click Calendar Permissions.
3. From the Permissions tab click Add.
4. Enter the name or email address for the individual you want to give editor permissions and then click Go.
5. The individual’s name appears. Select their name and then click Add.
6. Click OK.
7. Select the individual and then from the Permission Level drop-down, select Editor.
8. Click OK.

**Note:** Meetings marked as private will display only free/busy times.

Once you set reviewer permissions, the recipient will be able to see your meeting details through the Scheduling Assistant and will be able to open your calendar; refer to Open a Shared Calendar steps.

Delegates

If you give an individual delegate permissions, they can create, read or modify meetings on your behalf. They can also respond to meeting requests on your behalf through email. To do this, follow the steps below.

2. Click Add.
3. Enter the name or email address for the individual you want to give delegate permissions and then click Go.
4. The individual’s name appears. Select their name and then click Add.
5. The Delegate Permissions dialog box appears.
6. Select the permission levels for each of the categories from the drop-down lists. Consider the following:
   - Decide if you want your delegate to see your tasks. If not, select None from the Tasks drop-down.
   - Decide if you want to send a permissions summary. If so, make sure Automatically send a message to the delegate summarizing these permissions is checked.
   - Decide if you want your delegate to view your private items. If not, make sure Delegate can see my private items is not selected.
7. Click OK.
8. On the next screen, you’ll be prompted to select an option for “Deliver meeting requests addressed to me and responses to meeting requests where I am the organizer to.” As a best practice to avoid confusion, it is STRONGLY recommended that you select My delegates only.
   - Click OK to apply and save your changes.
We can help! Use these shortcuts for Office of Information Technology assistance:

24/7 Info & Work Requests :: www.ohio.edu/oitech :: IT-related trouble reports, assistance requests
Password Changes :: www.ohio.edu/ohiopassword :: Help with password changes and account security
Network Registration (NetReg) :: www.ohio.edu/netreg :: More details and FAQs about NetReg
Email Help & Forwarding :: www.ohio.edu/email :: Help with Catmail, email forwarding, and Exchange
Blackboard Assistance :: www.ohio.edu/blackboard :: Extensive help files for using Blackboard
Software Sales & Licenses :: www.ohio.edu/software :: Downloadable software and software sales
Bobcat Depot :: (597-DEPO) www.ohio.edu/techdepot :: Walk-Up tech assistance and sales in Baker Center