MS Outlook – Delegation Tips

What is calendar delegation?
In Outlook, calendar delegation is authorising someone (your delegate) to perform calendar actions on your behalf. By default, Outlook gives your delegate Editor permissions for your calendar. This allows them to read, create and modify your calendar items. For example:

- create, update and cancel meetings in your calendar
- receive and respond to meeting invitations on your behalf

It is up to you if you want to receive a copy of meeting requests or if you prefer them to go directly to your delegate. You can decide this during delegate set up, or by changing your delegate permissions.

For help getting started, or changing delegate permissions, please see our guide to setting up delegation.

Before you start

Staff can install up to five free Microsoft Office 365 onto personal PCs or laptops for guidance see Microsoft 365: Apps & Services. For help, please see Staffnet/working-here/software (click on the Software tab).

Known issues
If you have experienced problems with calendar delegation, you are not alone. Similar issues have been reported at other institutions. For example:

- Disappearing and/or inconsistent meetings
- Synchronisation issues between PCs and mobile devices

In terms of synchronisation, there is always a level of risk when using a mobile device for email and calendaring. This is because network connectivity is more variable on a mobile device than on a networked desktop PC.

For example, if a meeting scheduled for 12.30 is accepted on a mobile device at 10am on the day of the meeting, then the meeting is cancelled on a networked PC at 11.30am, the mobile device may not synchronise in time to alert the attendee.

In a more complex example, if a meeting is cancelled on a networked PC but edited on a mobile device before the cancellation is processed, the edit may override the cancellation for some users. Attendees may not be aware that their calendars are different until it is too late.

To help reduce the risk of issues, please follow our best practice tips for calendar delegation on page 2.

Further information and help
Use MyIT to log calls with the IT Service Desk: myit.abdn.ac.uk

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Best practice guidelines

1. Use Outlook or Outlook Web App (OWA) to manage your calendar
Avoid using other clients (such as the built-in calendar on mobile devices) to create, update and cancel meetings, or to respond to meeting invitations.

2. Keep software/devices up to date
Use the same version of Outlook on all PCs (at work and home). This should be Microsoft Outlook 2010 or later. Check regularly for updates to any devices that connect to your calendar.

3. Do not edit the same item on multiple devices within a short period
This reduces the risk of conflicting calendar information.

4. Avoid copying or forwarding meetings
Instead, ask the meeting organiser to send an invitation to any additional attendees.

5. Decide who will respond to meeting requests
If more than one user receives a copy of meeting invitations sent to you, only one person should respond on your behalf. Multiple responses can confuse the system.

6. Respond to all meeting requests
Microsoft recommend that the person who responds to your meeting requests Accepts or Declines via the email invitation. They should avoid deleting meeting requests without responding.

7. Limit number of delegates
Microsoft recommend that you grant Editor permissions to only one delegate and that you limit the number with Reviewer/Contributor permissions. Assigning Editor permissions to more than one person can cause conflicts and slow down your calendar. It is also more difficult to track and resolve any problems that occur.

8. Consider calendar sharing
If more than one user needs access to your calendar, carefully consider whether all of these users require Editor permissions. Would Reviewer permissions suffice?
For help with permissions and calendar sharing, please see our guide to working with multiple calendars.

9. Replace delegates who leave
To replace a delegate for any length of time, change permissions from Editor to Reviewer (or None) before granting Editor permissions to the replacement or temporary delegate.

10. Cancel faulty meetings
If you experience technical problems with a meeting, the safest solution is to cancel the meeting and create it again. If it is a recurring meeting, cancel the series.

11. Avoid deleting meetings directly from Outlook’s calendar view
If a meeting is cancelled, click Remove from Calendar in the cancellation email window.

12. Limit the range of recurring meetings
Always set an end date (or number of occurrences) for recurring meetings.