Active Directory – Outlook Shared Calendars and Authorising Delegate Access

Below are the steps to not only share your calendar, but also set up delegate access to another staff member in Microsoft Outlook.

Similar to having an assistant, delegate access helps you managing your incoming emails, with another staff member - known as a delegate – receiving and responding to emails and meeting requests on your behalf.

Please note that delegate access is not compulsory, therefore, only complete step 1 if you do not want delegate access to another staff member.

Please complete the below steps if you use one of the following versions of Outlook:

- Microsoft Outlook 2013
- Microsoft Outlook 2016
- Microsoft Outlook 2019
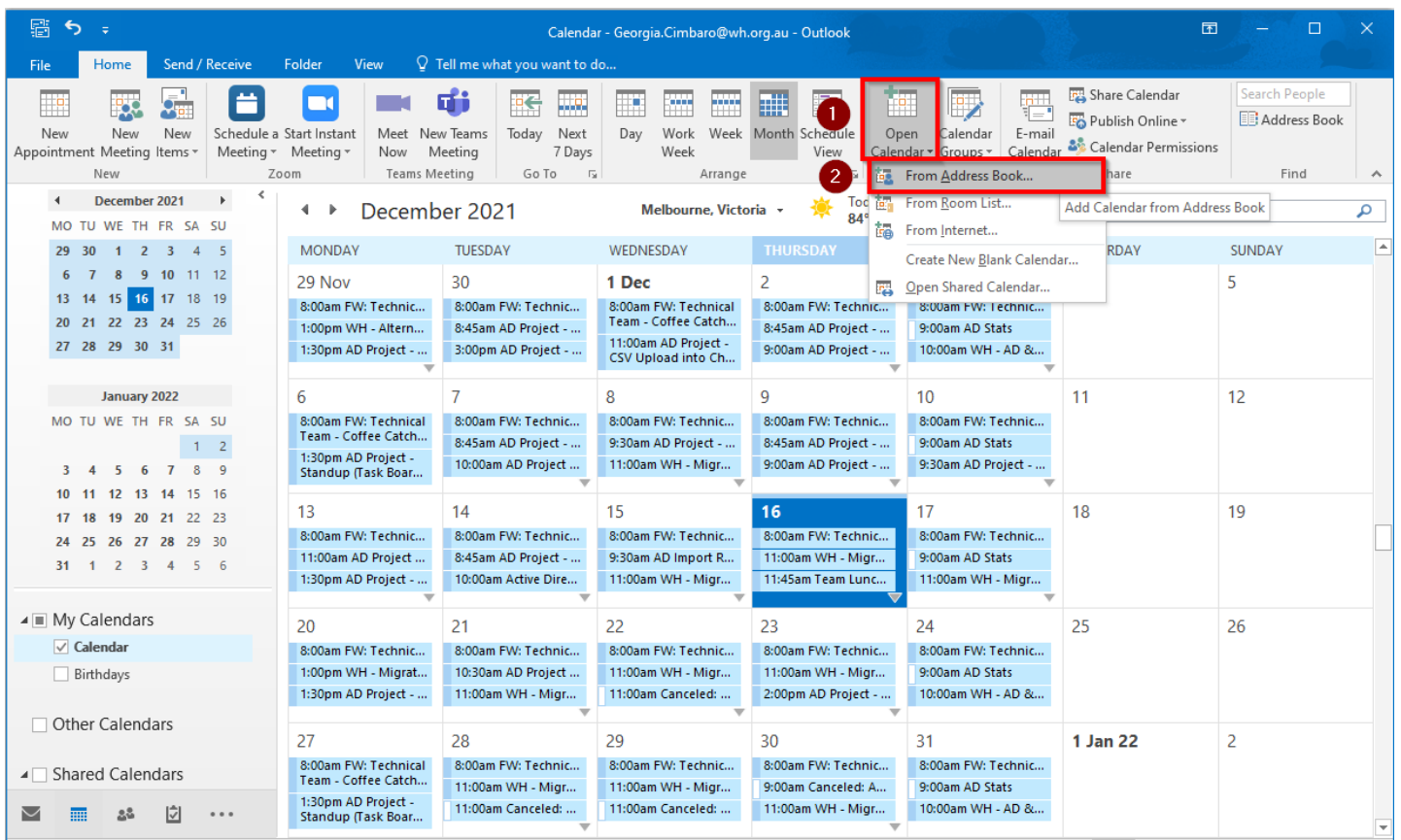
Step 1 : Add Shared Calendar via Microsoft Outlook

Once you have opened Microsoft Outlook, please perform the following steps to add a shared Calendar;
- Head to *Calendar* view. This can be found in the bottom left-hand corner of Outlook
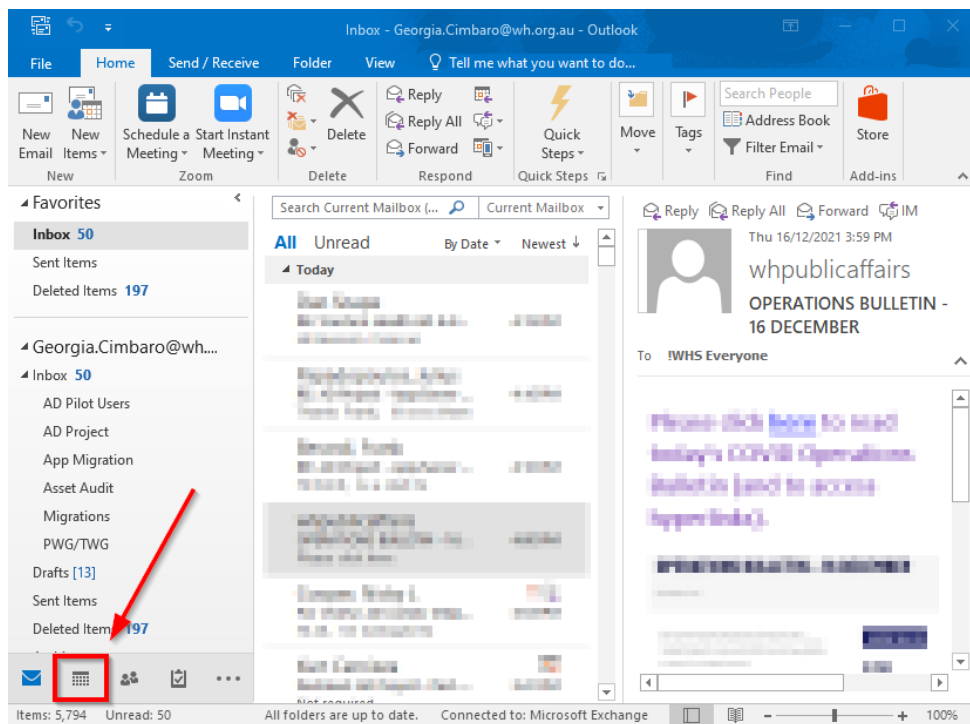
Click on *Open Calendar* located on the top toolbar of you Outlook Calendar;
- Once the drop-down list appears, click *From Address Book…*

Once the pop-up window appears, search for the staff member you wish to share your calendar with;

- Select the name of the staff member whose calendar you want to view
- Click *Calendar* to ensure the name appears below
- Click *OK*
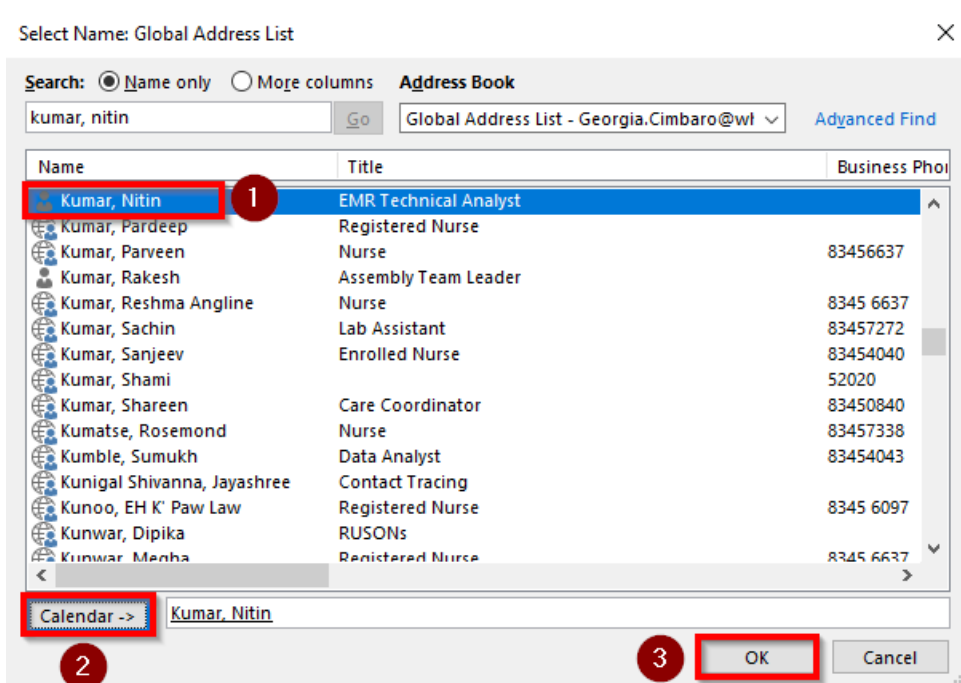
You will now be able to view your selected calendar under *Shared Calendars*

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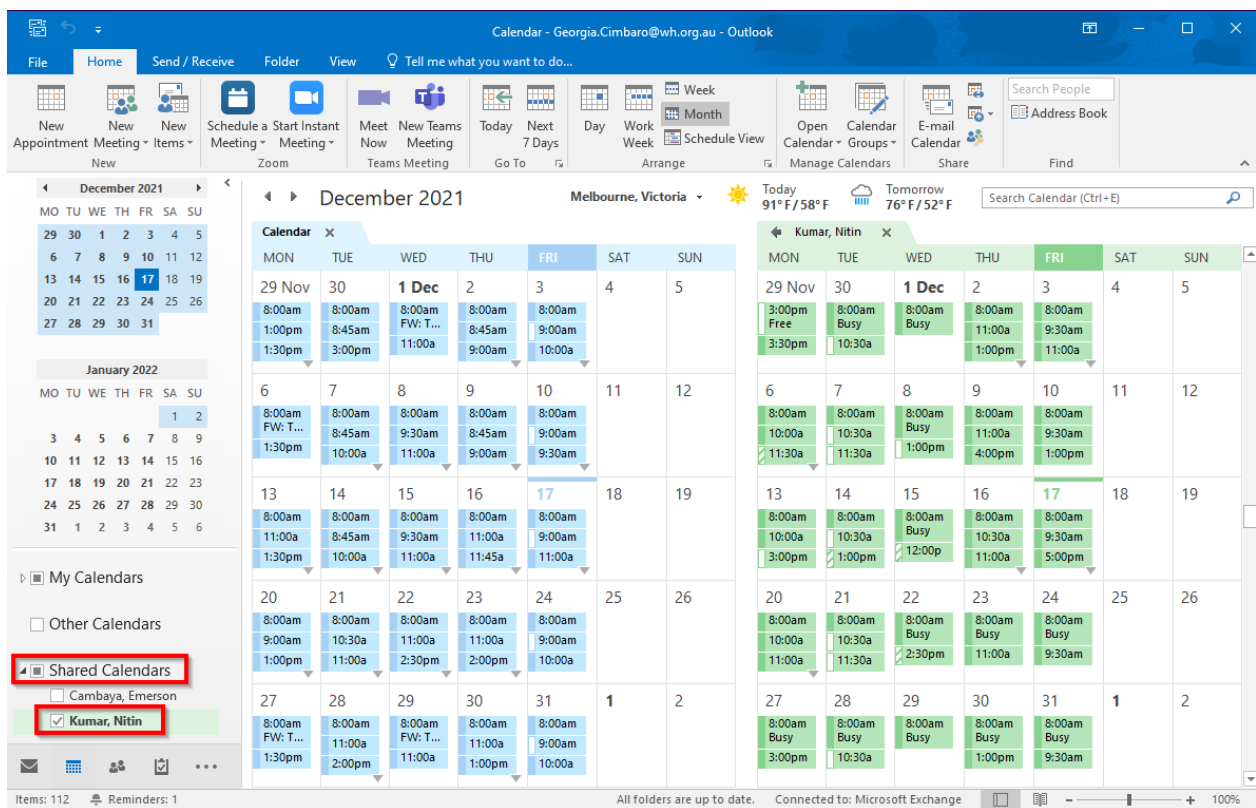
Important things to note:

- By default, you will only be able to see 'Free' or 'Busy' time slots on another calendar. The staff member whose calendar you want to view will need to grant authorisation for you to view/manage their calendar details
- You will not be able to view the calendar of a staff member who is on a different Active Directory
    - E.g. If you have been migrated to the new Active Directory and your colleague whose calendar you want to view has not, their calendar will not be visible to you until you have both been migrated to the new Active Directory.
- If any of the checks included in this QRG fail, please contact ServiceDesk and provide a brief description of your issue:
    - Phone: 03 8345 6777
    - Email: servicedesk@wh.org.au
    - Online: http://servicedesk.wh.org.au

Step 2 : Delegate access setup via Microsoft Outlook

Once you have added the calendar of another staff member, they will need to perform this step on their Microsoft Outlook account to authorise your access to their calendar.
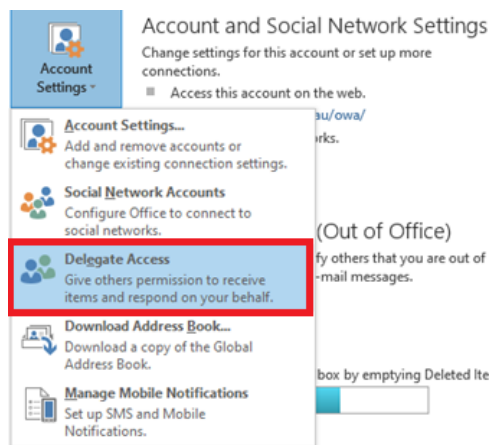
In order to allow another staff member to view and manage emails or calendar details, please perform the following steps;
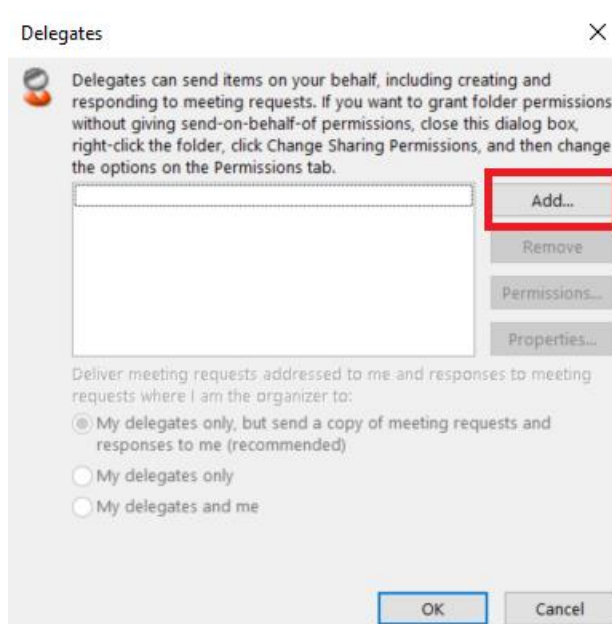- Click on **File** on the top right corner of the outlook window:
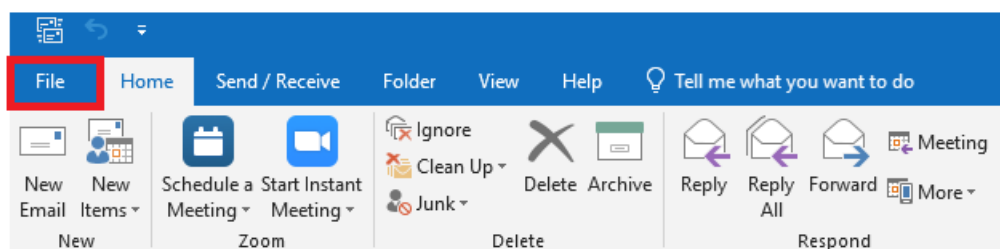
Click on **Account Settings**;
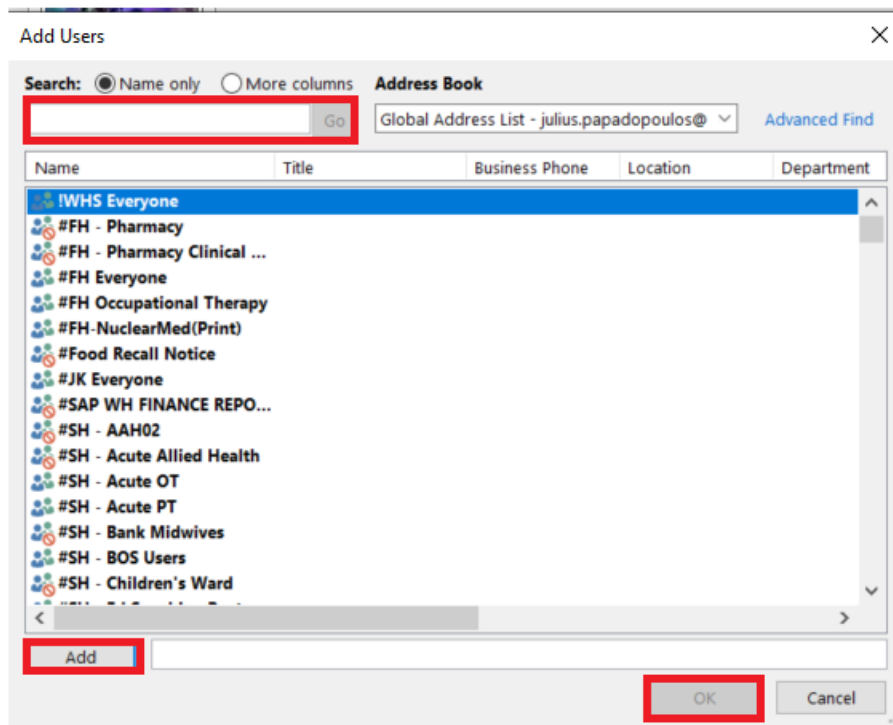- Once the drop-down list appears, click on **Delegate Access**

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Once the pop-up *Delegates* window appears;
- Click on *Add...*

Add the email of the staff member you want to delegate your mailbox;
- Click *Add*
- Click *OK* to confirm

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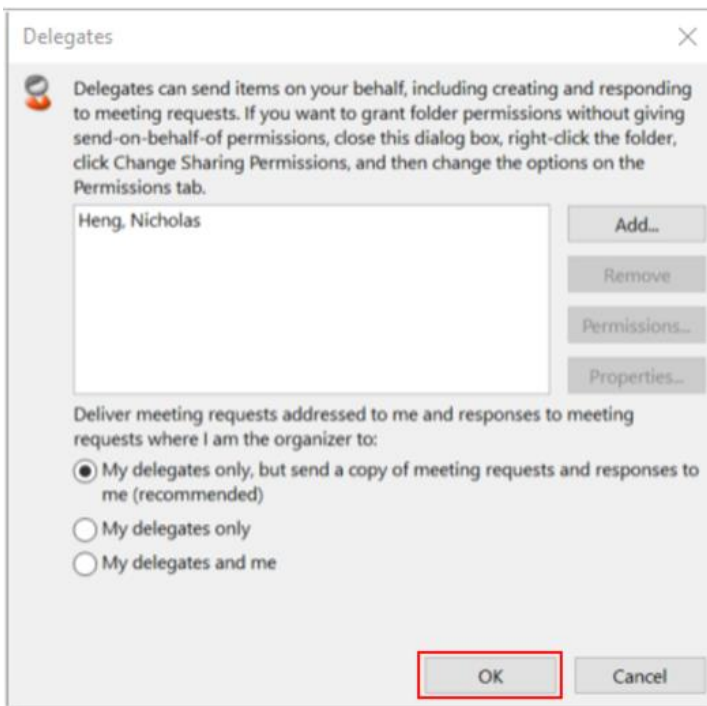
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Select the level of permissions the delegate requires;

- Once you have set the permissions, click **OK.**
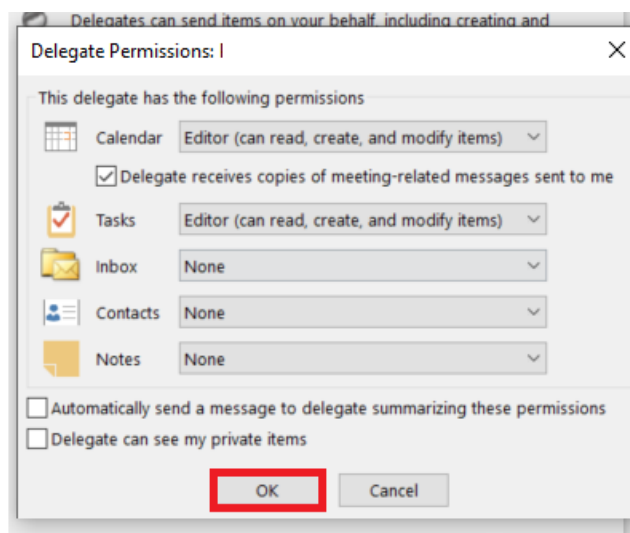
You will see the name of the delegate you have given permissions to in the textbox. If this is correct, please select *OK*.

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Important things to note;

- You will not be able to access the mailbox of a staff member who is on a different Active Directory
  - E.g. If you have been migrated to the new Active Directory and your colleague whose mailbox you want to view has not, their mailbox will not be visible to you until you have both been migrated to the new Active Directory.
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Non-Mailbox owner:

If a manager or another staff member requests access to another staff member mailboxes, in the absence of the mailbox owner, written approval is required from People Services (HR) before access is granted. The actions taken and the written people services approval need to be recorded in ITSM system (Cherwell) under the mailbox owner name.

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