Managing a Calendar Resource in Live@EDU

EITS Staff

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Getting Started

Resources are managed by the Resource Delegates. In practice, this will be the security group that was set up to administer the resource. Zita de Schauensee is an IT manager in the OCIS Department. She has requested a resource be created (see Appendix A for information on requesting a Calendar Resource):

Resource Name: “OCIS Conference Room 38”

Creating this resource will require an SMTP mail address for the resource (resource mailboxes are disabled, but do receive meeting requests, cancellations, etc., so must have an address). Administration of this resource will also require the creation of a security group. This group will act as the “delegates” for the resource. It will also require an SMTP address.

From the request for the resource, here is what will subsequently be created (defaults):

- Resource Name: “OCIS Conference Room 38”
- Resource SMTP: res.OCIS.conference_room_38@uga.edu
- Security Group: “Group OCIS Conference Room 38”
- Group SMTP: grp.OCIS.conference_room_38@uga.edu

The full SMTP names (including the “@uga.edu”) are used for a few things, though most of these are internal and seldom encountered by delegates. The “Alias” (in this example, “res.OCIS.conference_room_38”) will more often be used, as will the display names of both the resource and the group. In some instances, the defaults above are not used. This is infrequent.

Ms De Schauensee will be made the owner of the security group and will be a member as well. This is an important distinction:

- An Owner may add/remove other owners and members of the group
- A Member is actually involved in managing the resource
- A Group Owner is not necessarily a Group Member

It is strongly recommended that there be at least two owners and at least two members; this is a great help when a single key person might be unavailable.

Most of this document will use Outlook Web App (OWA) for its examples; in some instances Outlook 2010 may be used (it allows considerable granularity with access permissions), but much of the focus will be upon OWA.
Assigning Delegate Roles

If Zita wishes to add additional owners/members, she will need to modify the Group above; using OWA:

Select “Options”

From “Options”, select “See All Options”
Select “Groups”

Zita is both an Owner and Member of “Group OCIS Conference Room 38”:

Zita may add and remove additional owners and members on this screen. In either case, she will work from the Owner’s selection and may simply highlight the group she wishes, and then press the left mouse button twice.

Properly speaking, the members of the delegate group have what is called **Reviewer** access to the Resource Calendar. This and other access rights are discussed in a subsequent section. Briefly, Reviewer access permits viewing, but not editing, Calendar events.

The screen she will see is displayed on the following page.
This is the information for “Group OCIS Conference Room 38”. Much of this may be edited by the delegates, though the results are unpredictable – the group is tightly connected with the resource and modifications may affect the control of the resource. A “description” may be added, but do not make any other changes to “General”.

Of particular interest are “Ownership” and “Membership”. Owners and members are added and removed using this.

Examining “Membership”, press the double down arrows to add (or remove) someone:
Zita wants to add one of her staff members, Joe Staff, as a delegate:

Pressing “Add”:

A substantial list of names is displayed (and it is not exhaustive). Zita simply types the name of the person she wishes to add (“Joe Staff”) and searches....
At this point, Zita simply presses “OK” and a new member is tentatively added to the group:

Who May Be Added to a Group

Currently, all owners and members must be on the same mail system. This would seem to be an obvious requirement; however some mail systems are hosted at uga.edu (e.g. “dept.uga.edu”), and their users are a part of UGAMail (though it may not appear so). In Exchange terms, these are all “UserMailboxes”. It is also possible for some external (Exchange) systems to be connected to UGAMail in such a way that they may receive mail at an address “@uga.edu”, but the actual mailbox is on the external server. UGAMail sees these as “MailUsers” (the term Exchange uses); their real address is not on the same system as the resource (all resources are part of UGAMail). Though they may be added to the Group (UGAMail correctly sees the address as an entry in the internal directory of users), they will not have appropriate access because their mailbox resides elsewhere. This applies even though the “mailuser” may be able to view some calendars.

This can be a source of some confusion; contact EITS if you are having problems assigning rights to delegates. Note that the icons used will vary for Mailboxes and MailUsers (when you Add someone to a Group):

UserMailBox: Jane Staff  MailUser: Joe User
For Joe to be added to the group permanently, Zita must press **Save**.

Owners are added in much the same way. To remove owners or members, highlight the name, press “Remove” and then press **Save**.

**Using Outlook to Maintain Groups**

While there is some ability to manage Groups when using Outlook, it is limited to adding and removing members only. A single “Owner” is displayed and there is no ability to obtain a complete list of owners (or modify owners shown). Outlook Web App (OWA) is the recommended tool for working with groups.
Assigning Calendar Resource Settings via OWA

*Resource Settings* should not be confused with *Access Permissions*. The settings are, essentially, the “policies” that determine how the resource is scheduled. Access Permissions are discussed in a following section.

The easiest way to access and adjust resource settings is to open the resource through OWA.

In the upper right corner, near the name, is a small gray down arrow (▼); it is a menu pull-down:

Select “Open Other Mailbox”:

You must select the mailbox to open.
Zita simply types “ocis” in the **Select Mailbox** window and presses “Enter”. There are several that match this display name (all of them may or *may not* be shown):

![Select Mailbox window with multiple matches](image1)

The resource she wants to work with is “OCIS Conference Room 38”. She highlights that, and presses “Enter” again:

![Select Mailbox window with highlighted resource](image2)

This inserts the correct resource mailbox in the window.
Now, press **Open**, and you have opened the resource “OCIS Conference Room 38”

On the upper right tab is the resource name; it is also in the upper left portion of the window. Use **Options > See All Options**, then select **Settings**: 

![Image of the settings page with a highlighted section for setting permissions and scheduling options.](image-url)
These are default settings. Depending upon the resource and how it is expected to be used, you may wish to allow it to be booked more than 180 (~ 6 months) days in advance (recurring meetings may have problems with this).

For “Scheduling Permissions”, you will see that the resource delegates (all members of the group “Group OCIS Conference Room 38”) may schedule and will be accepted automatically if the room is open.

*All others must be approved* (though the time block will be tentatively assigned to them).

You may grant exceptions to this (granting exceptions is not generally recommended. If done, it is best to limit the number who may do this. However, it is assumed the delegates know best how to manage their resources).

Resource Settings may be accessed and (re)set only through the **Settings** selection of the Resource (via OWA) or by EITS staff (typically using PowerShell).

See **Appendix B** for more information on the default settings. **Appendix A** has information on Calendar documentation (links), including resource settings.

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**Why an Account May be Opened in this Way**

This looks to be a very helpful way to access another account (it applies to any account, not just resources). So a question might be: “How is this access granted to Zita?” The answer is that the Security Group (as delegates) has been granted “full access” to the resource. This is not the same as the Calendar access rights discussed below. It applies to the mailbox itself. Owners and members of this group have this access, and lose it if they are no longer in the security group.
Calendar Access Permissions: What They Mean

One of the most misunderstood aspects of managing a Calendar Resource is the matter of Access Permissions. To begin with, all members of the Delegate group (in the example, this is “Group OCIS Conference Room 38”) have “Reviewer” access to the Calendar folder. They have this access by virtue of their group membership, and would lose it if they were removed from the group. In practice, it is not recommended that persons in the group be granted any more specific access than they have via their membership except in the case they need greater access rights than they have through the group. It is possible to view the access rights assigned when using the Web (OWA), but assigning (and viewing) rights is most easily done using Outlook.

Common access rights

These two apply only to the Calendar:

- **AvailabilityOnly** – View only availability data. The minimum setting, used to provide a bare minimum of scheduling information. This is the usual default setting for an individual’s Calendar, but not for a Resource.

- **LimitedDetails** – View availability data with subject and location. This is the typical setting for “Default” on a Calendar Resource, that is, any unnamed user.

Other Access levels (terms are defined below):

- **None** – No information is provided, but the folder is visible. This is the typical setting for “Anonymous.”
- **Owner** – CreateItems, ReadItems, CreateSubfolders, FolderOwner, FolderContact, FolderVisible, EditOwnedItems, EditAllItems, DeleteOwnedItems, DeleteAllItems.
- **PublishingEditor** – CreateItems, ReadItems, CreateSubfolders, FolderVisible, EditOwnedItems, EditAllItems, DeleteOwnedItems, DeleteAllItems
- **Editor** – CreateItems, ReadItems, FolderVisible, EditOwnedItems, EditAllItems, DeleteOwnedItems, DeleteAllItems
- **PublishingAuthor** – CreateItems, ReadItems, CreateSubfolders, FolderVisible, EditOwnedItems, DeleteOwnedItems
- **Author** – CreateItems, ReadItems, FolderVisible, EditOwnedItems, DeleteOwnedItems
- **NonEditingAuthor** – CreateItems, ReadItems, FolderVisible
- **Reviewer** – ReadItems, FolderVisible
- **Contributor** – CreateItems, FolderVisible

The terms above are taken from Microsoft documentation; they have specific meanings:
• **ReadItems** – The user has the right to read items within the specified folder.
• **CreateItems** – The user has the right to create items within the specified folder.
• **EditOwnedItems** – The user has the right to edit the items that the user owns in the specified folder.
• **DeleteOwnedItems** – The user has the right to delete items that the user owns in the specified folder.
• **EditAllItems** – The user has the right to edit all items in the specified folder.
• **DeleteAllItems** – The user has the right to delete all items in the specified folder.
• **CreateSubfolders** – The user has the right to create subfolders in the specified folder.
• **FolderOwner** – The user is the owner of the specified folder. The user has the right to view and move the folder and create subfolders. The user can't read items, edit items, delete items, or create items.
• **FolderContact** – The user is the contact for the specified folder.
• **FolderVisible** – The user can view the specified folder, but can't read or edit items within the specified folder.

The “specified folder” is typically “\Calendar”.

In practice, the more common permissions for Calendar Resources are:

- Owner
- PublishingEditor
- Editor
- Author
- Reviewer
- LimitedDetails
- None

However, any of the permissions listed above may be assigned; those who require access to Calendar items beyond default could probably use one of **Editor**, **Author** or **Reviewer**. Local requirements, the nature of the resource itself and how it is used will determine what is best.

If **Reviewer** access is not appropriate for the Delegate group, it may be modified as needed. Most delegates only require access to approve or deny a request; when more control is needed, it may be granted. See below if this is necessary.
Let’s consider the resource that has been set up: “OCIS Conference Room 38”

We know its “real” name is res.OCIS.conference_room_38@uga.edu and that it is administered by a group of delegates in “Group OCIS Conference Room 38”. Our manager, Zita de Schauensee, is the owner (and a member) of the group, but beyond that, has been granted no additional access to the resource. The access she has is sufficient for most purposes, however; as the delegate group has “Full Access” to the mailbox (the resource account itself) and “Reviewer” access to the Calendar folder. Suppose Ms De Schauensee wishes to grant some access (or alter some existing access rights). To “Change Sharing Permissions” in OWA, she would switch to the Calendar, open the calendar for “OCIS Conference Room 38”, right mouse click on the Calendar, select the “Share” options, and then?:

Everything in the “Share” menu is greyed out: she cannot even view permissions in this way. In any event, permissions that may be granted using OWA are limited.

In the past, it was possible to login to a Resource using OWA. Microsoft is removing support for this and EITS discourages this form of access.
To grant others access to the Calendar, Ms De Schauensee will need to use **Outlook**. The examples that follow are done with Outlook 2010, but Outlook 2007 is similar.

Zita logs in to her account using Outlook and switches to the Calendar, if she does not already have “OCIS Conference Room 38” in her list of calendars, she will need to add it.

She will select the Calendar to view from the Room List. She types “ocis” to search. All the resources that include “ocis” in their name are shown. She highlights “OCIS Conference Room 38”, and presses the “Rooms ->” button at the bottom left of the screen. It will display “OCIS Conference Room 38”. She then presses “OK” at the bottom right.
As a side note, members of the Delegate Group should **not** use the “Open Shared Calendar” selection; for them, this is **not** a shared calendar (they are, effectively, owners).
Here is the newly-added Calendar:

Right mouse click over the Calendar’s name ("OCIS Conference Room 38") in either the leftmost column, or on the tab of the calendar itself (if done here, the font shifts to bold). Select “Properties”: 
In “Calendar Properties” screen, select the “Permissions” tab:

This will display all current permissions set and allow Ms De Schauensee to alter these, or to add (or remove) additional persons or groups:
The pull-down shows the defined permission levels described previously:

These may be modified ("customized") as needed. It is also possible to add to the list. To do
this, press “Add”:

Ms De Schauensee wants to grant access for one of her staffers, Jane Staff. She presses “Add”, bringing up a search screen (not unlike the screen shown when searching for the resource calendar – because it is much the same search). She types “jane staff” in the search:

Assuming only one “Jane Staff” is returned, she presses the “Add ->” button to add “Jane Staff”. Once that is displayed, she presses “OK”.

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We see that Jane has been granted the “Default” privileges:

![Calendar Properties](image)

However, these are easily modified. Before moving on, notice the privileges displayed for “Free/Busy time, subject, location”. These are shown in the area below the “Permission level”. Note that there is no permission to delete any items, and no write access whatsoever.
Zita has decided to grant Jane “Editor” privileges:

![Calendar Properties dialog box showing "Editor" privileges for Jane](image)

Note the change in the privileges. Zita must press “OK” for these to take effect.

<table>
<thead>
<tr>
<th>Default Access by Delegate Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>As has been mention, the default access to the Calendar folder for the Delegate Group (in this case, “Group OCIS Conference Room 38”) is Reviewer. In most cases, the delegates are only verifying the room has been (or may be) properly scheduled by appropriate persons, and there is little need for more extensive control of the resource calendar. However, some resources are much more closely maintained by the delegates and a different level of access may be more appropriate. The access granted may be modified using techniques similar to those shown above; as in other cases, it is assumed the delegates know best how they wish to manage the resource. Contact EITS if there are questions or issues about this.</td>
</tr>
</tbody>
</table>
Appendix A: Additional Calendar Documentation

EITS Documentation for the UGAMail Calendar is on the EITS Helpdesk Wiki:

http://wiki.eits.uga.edu/help/index.php/UGAMail_Calendar#tab=Overview

Here, tabs will link you to:

- Overview
- Resources, Tutorials, & Documentation
- Frequently Asked Questions

This is a fairly extensive collection of web pages, videos, etc. The Calendar Resource documentation has considerable information on resource settings. These are briefly described in Appendix B.

You may request a resource calendar through these links, or simply go here.

Although it is oriented to Outlook users, the Microsoft publication “Outlook meeting requests: Essential do’s and don’ts:”


This can be very helpful for general calendar use.

Cornell University’s IT division developed a somewhat tongue-in-cheek reference on *Maintaining Calendar Harmony* that includes a great deal of useful information on delegates, synchronizing calendars and keeping them current. This is a well-written document and collects a material from Microsoft as well as others into a single location:

http://www.it.cornell.edu/services/guides/facstaff_email/harmony/index.cfm

As a cautionary note, much documentation, both here and on the web will refer to “sharing a calendar”. This should not be confused with a *shared mailbox*, which is a special-purpose Exchange mailbox.
Appendix B: Default Resource Settings

When a resource is created (typically this is done with PowerShell), most of the defaults are accepted:

- **ResourceDelegates**  `grp.DEPT.resource_name@uga.edu` <assigns the security group (delegates)
- **ForwardRequestsToDelegates**  `$true` <sends requests to the delegates, not the resource
- **TentativePendingApproval**  `$true` <requests are “tentative pending delegate approval”
- **AutomateProcessing AutoAccept** < accepts non-conflicting requests (within policy)
- **AllowRecurringMeetings**  `$true` < allows recurring meetings
- **AllowConflicts**  `$true` < allows double booking, but all requests are sent to delegates
- **AllBookInPolicy**  `$false` < All requests, even within-policy, must be approved
- **BookInPolicy**  `grp.DEPT.resource_name@uga.edu` < group may automatically reserve resource
- **AllRequestInPolicy**  `$true` < everyone may request the resource within policies
- **AllRequestOutOfPolicy**  `$false` < no individual or group may schedule anything that is out of policy
- **AddOrganizerToSubject**  `$false` < turns off Default inserting the meeting organizer into the “Subject:”
- **DeleteSubject**  `$false` < turns off Default removal of “Subject:” from meeting request. Related to prev.

What do the various settings mean and can (or should) they be changed? The full options for a calendar (individual, shared or resource) are described in detail here:


This is an attempt to describe the most important ones. In some cases, there will be several options; the default is shown in **bold**. Much of Microsoft documentation describing how a resource calendar operates will refer to two processes: the Calendar Attendant and the Resource Booking Attendant. These two processes (and others) are described here:


Briefly, these are simply programs that process calendar scheduling requests. The Calendar Attendant inserts calendar events (meetings, appointments, etc.) on a recipient’s calendar.
Appendix B

without outside intervention. These events will all be marked as “tentative”, pending acceptance or rejection. The Resource Booking Attendant accepts or rejects resource requests based on availability and policies. The “policies” referred to may be set (or modified) through the “Resource Settings” described above. For example, if a calendar (of any sort) did not allow scheduling beyond 6 months, an attempt to schedule a meeting 18 months in advance would not be permitted.

In the list above, the first three options shown relate to the Delegates

- ResourceDelegates
- ForwardRequestsToDelegates
- TentativePendingApproval

AutomateProcessing uses (or disables) the Calendar Attendant and the Resource Booking Attendant. When “None” is used, both are disabled. When “AutoAccept” is specified, both are enabled. When “AutoUpdate” is specified, only the Calendar Attendant is enabled.

AutomateProcessing    None | AutoUpdate | AutoAccept

The next two refer to policies used to schedule or request the resource:

- AllowRecurringMeetings
- AllowConflicts

There are other policy parameters, notably “BookingWindowInDays”, which uses the default of 180 (~6 months).

The following deal with policy enforcement:

- AllowConflicts
- AllBookInPolicy
- BookInPolicy
- AllRequestInPolicy
- AllRequestOutOfPolicy

For information on setting Calendar policies/options using Outlook or OWA, see:

http://help.outlook.com/140/Ff919190.aspx#PowerShell

Note that some options may be set only by EITS.