Calendar Delegation Instructions for Zimbra

Account Holder Setup
When delegating your calendar to a person responsible for managing it, it is very important that not only will you share the calendar, but you will also create and share a folder that will contain all meeting notifications related to your appointments and events. First, you (the account holder), will create and share a Meeting Notification Folder and setup filters to route meeting notification emails to this folder. When this is complete, you will share your calendar with the person responsible for managing it.

Sharing the Meeting Notification Email Folder
1. Log in to Zimbra and create a new email folder (i.e.: “Meetings). This will be the folder where meeting notifications will be shared with the person(s) managing your calendar.
2. Right-click on the newly created folder and click Share Folder.

3. In the Share Properties window, enter the email address of the person who will be managing this calendar (see Figure 2).
4. In the Role field, select Manager (see Figure 2).
5. Click OK to close the window (see Figure 2).
Creating The Meeting Notification Email Filter

The following explains how to create a meeting notification email filter. This filter will route all meeting notifications to the shared *Meeting* folder that you created using the steps above.

1. Click the **Preferences** tab.

![Figure 3 - Preferences](image)

2. Click **Filters**.

![Figure 4 - Click Filters](image)

3. Click **Create Filter**.

![Figure 5 - Create Filter](image)

4. In the *Filter Name* field, type a name for this filter. (i.e.: “Meetings”).

![Figure 6 - Filter Name](image)

5. Verify that **any** is selected *Grouping Preference* dropdown.

![Figure 7 - Any](image)
6. Select **Body**, located in the **Conditions** dropdown.

![Figure 8 - Conditions dropdown](image)

7. Type “The following is a new meeting request” in the **Conditions** text box.

![Figure 9 - Conditions text box](image)

8. Click the + button.

![Figure 10 - The + button](image)


![Figure 11 - Conditions dropdown](image)

10. Type “The following meeting has been modified” in the **Conditions** text box.

![Figure 12 - Conditions text box](image)

11. Click the + button.

![Figure 13 - The + button](image)
12. Select **Body**, located in the *Conditions* dropdown.

![Figure 14 - Conditions dropdown](image)

13. Type “The following meeting has been canceled” in the *Conditions* text box.

![Figure 15 - Conditions text box](image)

14. Select **Move into folder** in the *Actions* dropdown.

![Figure 16 - Move into folder](image)

15. Click **Browse**.

![Figure 17 - Click Browse](image)

16. Select the folder that you wish to move the emails to.
17. Click **OK**.

![Figure 19 - Click OK](image)

18. Click **Save** to save the filter.

![Figure 20 - Click Save](image)

**Sharing Items**

Upon creating the email filters, you are now ready to share the calendar and meeting folder with the person who will be managing it for you. The process for sharing both the calendar and meeting folder is the same, though you will have to individually share both items with the person responsible for managing your calendar. The following explains how to do so.

1. Click the **Application Tab** for the item that you wish to share (such as the Calendar).

![Figure 21 - Click Calendar](image)

2. Right-click the item you wish to share in the **Overview** pane.

![Figure 22 - Right-click the calendar](image)

3. Click **Share (Item)** on the pop-up menu that appears.

![Figure 23 - Share Calendar](image)
4. Enter the email address of the person whom you are sharing the item with and select the Manager role in the Role field.

![Figure 24 - Share Properties](image)

5. Click OK. Your item is now ready to be administered by the person you shared it with.

![Figure 25 - Click OK](image)

6. Repeat Steps 1 – 5 for any other items that you wish to share.

**Accepting the Calendar Item(s).**

Upon sharing the calendar and meeting notification folder, the person managing the delegated calendar must accept both the shared calendar and shared folder. The following explains how to do so.

1. Navigate to the email notification indicating that you have been granted access to a shared item.

![Figure 26 - Share Notification](image)

2. Click Accept Share in the email.

![Figure 27 - Accept Share](image)
3. The **Accept Share** window appears, indicating the role being granted to you. To customize the name of the share, use the **Name** field (see Figure 28).

4. Select a color for the shared item in the **Color** dropdown (see Figure 28).

5. Indicate if you wish to send an email in the **Do not send mail about this share** field (see Figure 28).

6. Click **Yes** (see Figure 28).

![Figure 28 - Accept Share Properties](image)

7. Repeat steps 1 – 6 to accept the shared message folder.

8. The new shared item is added to the **Overview Pane** of the item type.

**Other Notes**

1. The shared **Meetings** folder will appear on your folder list. You can rename the share name/color code if you choose. If you manage multiple users’ resources, you might want to place all of them into a new “Managed Resources” folder so that they are all in one location and kept separate from other mail folders.

2. When a meeting proposal is sent to the person whose calendar you now administrate, it will be redirected to the shared **meetings** folder.

3. You will get the standard **Accept**, **Tentative**, or **Decline** buttons you would see if you were to receive a meeting proposal yourself. You can click on any one of these buttons and the meeting proposal will be responded to from the correct calendar.