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Exchange Shared Calendaring Best Practices

In Microsoft Exchange, collaborative calendaring is achieved by transmitting shared calendar data in email. Although functional, the nature of email combined with the complexity of collaborative calendaring means there are occasional problems with shared meetings, calendar events, invitations, etc.

The guide below provides best practices to avoid problems when sharing calendars and meetings with others. While in some cases it is essential for delegates to manage or co-manage calendars, it's important for all delegates to have a clear understanding and agreement regarding who takes responsibility for which aspects of calendar management and to exercise those tasks in a consistent manner. This minimizes confusion and avoids potential problems.

Elaboration on the technical reasons for these practices can be found in the links to Microsoft document at the end of this article.

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Example of shared calendaring problem

The following is just one example of a scenario that can cause an accepted meeting to disappear from a calendar, and illustrates possible complications introduced by shared calendars. Individual scenarios will differ by versions of Exchange and Outlook/Entourage, and by different account permissions.

1. A meeting request is received in the inbox of a user who has a delegate.
2. The user opens the meeting request to view details, but does not accept or decline it.
3. The delegate opens the meeting request and accepts. The meeting request then disappears from the delegate's view of the inbox since it has been accepted.
4. Seeing that the calendar item has been added when the meeting was accepted, the user deletes the request from the inbox.
5. Even though this meeting has already been accepted, this deletion results in the corresponding meeting being deleted from the user's calendar. In some scenarios, had the user instead accepted the meeting, a duplicate meeting would have been created. Additionally, in some cases, a meeting that has been moved from the user's inbox after being accepted by a delegate can result in a "lost" meeting.

Best practices with delegates






1. Have as few delegates as possible, preferably none. While delegates can be very helpful, they are also the source of myriad difficulties within Exchange. Delegates dramatically increase the probability of missing appointments, duplicated meetings, unseen invitations, and conflicting attendance responses. The more delegates an account has, the greater the likelihood of intractable problems.

2. A manager and their delegates should all have the same version of Outlook, including patch level. Microsoft explicitly states this in various documentation. The only exception is that managers or delegates can also use Entourage 2004 for Mac version 11.3.0 or later. Keep in mind, however, that Entourage does not always sync calendar entries as expected.
3. Only allow one user for each mailbox to receive and process meeting requests. This means assigning a maximum of one delegate with Editor permissions. The mailbox owner and the delegate must decide who will process all meeting requests. Multiple interactions with a meeting invitation can result in various failures of the calendaring software, including lost meetings.
4. Only interact with meeting requests from one client. Due to the different methods of synchronization by various clients, it is easy to have multiple or conflicting replies to a single request which will result in a deleted or otherwise corrupted calendar entry. Only interact with meeting requests once, whether it be from Outlook, Entourage, a BlackBerry, Outlook Web Access, or other clients.
5. Only accept or decline meetings from the Inbox. Meetings responded to elsewhere may result in missed updates or mistakenly scheduled meetings. Additionally, meeting request status may be ambiguous to delegates when they see it filed elsewhere.
6. Do not auto-accept requests. If a user has granted one or more persons delegate access to their calendar, or if a user is a delegate, turn off automatic acceptance of meeting requests. By turning off automatic acceptance, problems are avoided with delegate workflow.

Best practices with meetings and invitations

1. Take immediate action on invitations as you receive them (Accept, Accept as tentative, or Decline). *Do not delete meeting requests*. By making a choice, you keep the meeting organizer apprised of your decision and reduce the chance of "lost" meetings.
2. Send updates when deleting, canceling, or moving events. If you do not send updates as a meeting organizer, attendees will not be informed of the changes.
3. Do not frequently change recurring meetings. Due to the way various clients process meeting requests, and the latency involved with different attendees accessing their calendars, meetings can easily become lost, mis-scheduled, or duplicated within a client after repeated updates. If a recurring meeting regularly changes time or location, cancel the meeting for all attendees and create a new meeting per occasion.
4. Do not forward meeting requests to other recipients. Forwarding invitations does not add recipients to attendee lists, and updates will not be sent to new attendees. Instead, have the meeting organizer add the new attendee list and send an update to the original meeting.
5. Do not use Outlook Web Access to accept meetings previously edited in Outlook. Outlook auto-generates tentative calendar events that are not processed the same by Outlook Web Access. Accepting a meeting in Outlook Web Access that was modified in Outlook will result in lost changes. Instead, accept the meeting request from within Outlook. Subsequent changes can be safely made from OWA.
6. Only accept or decline meetings from the Inbox. Meetings responded to elsewhere may result in missed updates or mistakenly scheduled meetings.
7. Do not make personal notes in meetings as an attendee. Doing so will result in lost notes if a meeting update is sent later.
8. Schedule end dates on recurring meetings. Failing to do so can result in corrupt meetings if the recurring meeting is regularly modified.

Relevant Microsoft articles

- [The delegates and the manager must all use Outlook 2007 when you use delegates in Outlook 2007](#) 
- [Description of common scenarios in which Calendar information may be removed from the Calendar or may be inaccurate](#) 
- [Outlook meeting requests: Essential do's and don'ts](#) 
- [Working with support to troubleshoot the Outlook calendar in an Exchange environment](#) 
- [MSKB 961752](#) , a useful Outlook hotfix for users running into certain meeting conflicts. Read the article before installing the hotfix, as it is only meant for certain problems that will eventually be corrected in SP2

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