LOTUS NOTES 7

Schedule and Delegation Instructions

By Isaac Vicci
1. Open your Notes client and go into your inbox.
2. From the toolbar, click on Tools and then choose Preferences (Figure-1)

![Lotus Toolbar](image1.png)

Figure-1 - Lotus Toolbar

3. In the Preferences Dialog, click on the Access & Delegation Tab (Figure-2)

![Access & Delegation](image2.png)

Figure-2 – Access & Delegation
4. Now, click on the Add Person or Group Button (Figure-3)

![Preferences](https://example.com/preferences.png)

**Figure-3 - Access & Delegation – Add Person or Group**

5. In the Add People/Groups Popup, click the dropdown button for step 1: “Enter the name of the person or group to whom you want to grant access...” and select the users who will have access from the address book. (Figure-4)
Figure 4 – Address book selection
6. Leave step 2: “Choose how of your mail..” as default “Only Calendar and To Do” (Figure-5)

**Figure-5 – Step 2: How much delegation**
7. For Step 3: “How much access you want to give...” select reading only or adding and editing as well (Figure-6)

![Add People/Groups dialog box](image)

**Figure-6** – How much access

8. Click OK to close the “Add People/Group Dialog”.
9. Next, choose the “Access to Your Schedule” tab. Click on the “Only the following people or groups may see...”, select the users from the address book again using the drop down button. (see Figure-7)

<table>
<thead>
<tr>
<th>Preferences</th>
<th>Access &amp; Delegation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access to Your Mail &amp; Calendar</td>
<td>Access to Your Schedule</td>
</tr>
<tr>
<td>Who is allowed to see your schedule information (when you are busy or available)</td>
<td></td>
</tr>
</tbody>
</table>

You may control how much information about your schedule (information in your calendar) other people may see when they are scheduling a meeting. If someone has not been given access to see your schedule information, the scheduler will show “Info Restricted” for your details when that person schedules a meeting.

Note: Granting someone access to see your schedule information (this tab) is independent from granting someone access to your calendar (previous tab).

- Everyone may see your schedule information
- No one may see your schedule information
- Only the following people or groups may see your schedule information

What schedule information they may see

- Only information about when you are busy or available
- Detailed information about your calendar entries
- Only information about when you are busy or available, except the following people may see detailed information

The amount of detailed information made available is determined by your system administrator. It usually includes when you are available.

- Do not include the subject of a calendar entry when detailed information is made available

![Figure-7 — Access to your Schedule tab](image)

10. Choose the level of details and click OK to close.

**THE END**

If you have additional questions regarding Lotus, please don't hesitate to open a ticket with the Helpdesk at Ext. # 4840