

Configure your Exchange/Outlook Calendar

Last Modified on Jan 7, 2024

You might need to tweak some settings in order for your calendar integration to work the way you want it to.

If you want to connect your Exchange/Outlook calendar, read more [here](#).

OnceHub communicates with your Exchange/Outlook Calendar using the Exchange Web Services (EWS) API, a well-established official Microsoft protocol. All credentials and data traffic are fully encrypted. Learn more about how your sign-in credentials are stored and protected by OnceHub.

Read on to learn how to adjust these settings.

Note :

Do my Users need to sign into OnceHub to receive bookings?

With most calendar configurations, your Users need to sign into OnceHub in order to receive scheduled bookings. This is because they must connect their calendar to OnceHub, using their credentials.


However, if your organization uses our Exchange calendar integration with corporate connection, it's possible to arrange for new Users to receive bookings with no involvement on their end. We call these 'passive users.'

Although they receive an invite when the admin creates their new User in OnceHub, they can ignore this. Organizations find that allowing for passive users reduces the effort involved to start scheduling for their team and increases adoption.

Configuring Default Calendar reminders

You can configure Default Exchange/Outlook Calendar reminders in the connected Exchange/Outlook Calendar. To do so, select an option from the **Default Exchange/Outlook Calendar reminders** drop-down list (Figure 1).

Calendar connection



Connected to Exchange/Outlook Calendar

Connected with:

- ✓ dana@example.com (Disconnect)
- ✓ Your busy time is securely cached for optimal customer experience ⓘ

Default Exchange/Outlook Calendar reminders ⓘ

15 minutes ▾

Figure 1: Default Exchange/Outlook Calendar reminders

Configuring OnceHub advanced integration settings

OnceHub allows you to cancel or reschedule bookings without leaving your personal calendar. By enabling the **OnceHub advanced integration settings** (Figure 2), changes made in your connected calendar are reflected in OnceHub. Learn more about canceling or rescheduling in Exchange/Outlook Calendar

ScheduleOnce advanced integration settings ⓘ

Deleting an event in Exchange Calendar cancels the booking in ScheduleOnce

Changing the time in Exchange Calendar updates the booking in ScheduleOnce

Figure 2: OnceHub advanced integration settings

Using Exchange resource calendars

If you are using Office 365 via OAuth, you can use the Exchange resource calendars for resource scheduling.

You have two options in how you use Office 365 resource calendars.

Grant permissions to a OnceHub User's calendar

1. Ensure that your Exchange Administrator grants you full read/write permissions to the resource calendars you

need to use.

2. Add the relevant resource calendar(s) to your Outlook Calendar.
3. In your OnceHub account, on the left-hand side menu, click the Booking pages icon. Select the Booking page that you want to use and configure the resource calendar settings in the **Associated calendars** section.
4. Follow the instructions in the Resource scheduling article.

Create a OnceHub user solely for that resource

In the **Associated calendars** section of that User's booking page, the resource calendar will be the main booking calendar for that scheduled meeting.

You can also add the User to a resource pool or to a panel meeting as a panelist.

When creating a panel meeting using a room or resource, we recommend you select the resource calendar User for the **Booking assignment** field. Add other members of the panel under the **Additional team members** field.

Note:

If you decide to select a different User for the Booking assignment field, making that User the main panelist instead of the resource calendar User, the behavior may not be optimal.

In a panel meeting, the main panelist is the User selected in the **Booking assignment** field. The calendar event is owned by their calendar and all other panelists are added to the event as guests. Due to the way Microsoft coded their resource calendars, a resource calendar added as a guest to a calendar event will not update when an event is canceled. This will leave a blocked event on that resource calendar at the canceled time.

However, if the resource calendar User is selected in the **Booking assignment** field, it becomes the main panelist and owns the calendar event, adding all other panelists as guests. If the event is canceled, the cancellation will reflect on all calendars and the time will be freed.

Arranging bookings for passive users

1. Delegate their calendar to the dedicated mailbox

It's possible for an Exchange admin to configure delegation of calendars to the dedicated mailbox, without involving the individual Users. However, if you do not prefer this method, the individual Users will need to delegate their main calendar to the dedicated mailbox themselves.

Delegation instructions for individual Users:

Delegating in Office 365 and Outlook Web App (OWA)
or Delegating in Outlook client

Learn more about how the Exchange corporate connection works

2. Add their User profile

To add the new User profile, in the top navigation menu, select the gear icon → **Users**. Learn more

3. Assign a scheduled meetings license

Assign the new User a scheduled meetings license by going to their profile and accessing the **Overview** section. Learn more

4. Assign ownership of Booking page(s) to the User

Once you've created their Booking page(s), you can assign ownership to the User.

Setup complete

You're set! The new User can now receive bookings through their Booking page(s). They receive all relevant notifications to their profile's email address and the bookings appear in their connected calendar. Next, you can configure your Exchange/Outlook Calendar connection.

Delegation setup: Microsoft 365 or Outlook Web App (OWA)

This is a User step-by-step guide to set up delegation in your Office 365 or Outlook Web App (OWA) as part of a corporate connection to Exchange. **Follow these steps only when instructed to do so by your Exchange administrator**, because they need to make some organization-level changes before you begin to delegate.

Delegation means that you permit a dedicated Exchange mailbox to create and manage events on your behalf. You must delegate if your organization is using Exchange integration in Delegation mode. If you are using Outlook client, see Outlook client delegation guide instead.

1. Sign in to your Office 365 account and navigate to your calendar.
2. Select your main calendar in the list on the left and click Share button at the top (Figure 1).

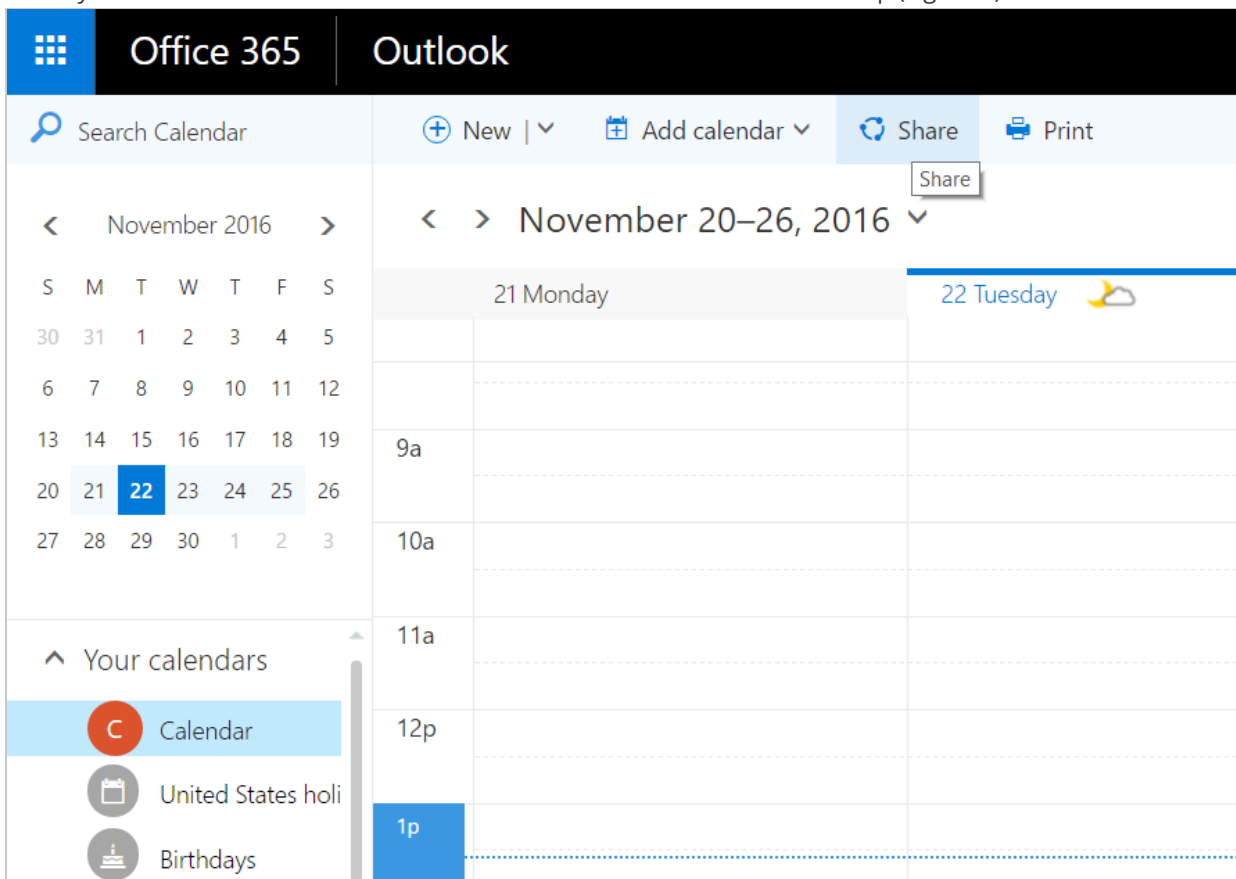


Figure 1: Select your main calendar

3. Search for the OnceHub dedicated mailbox, created by your administrator (Figure 2).

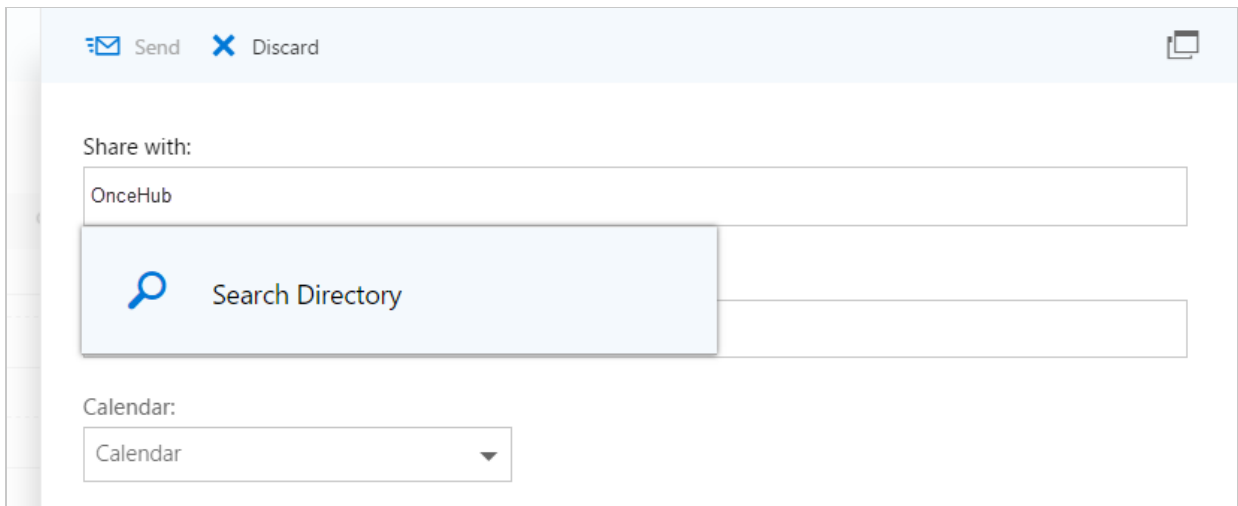


Figure 2: Search Directory

4. Select Delegate in the drop-down list and click Send button at the top (Figure 3).

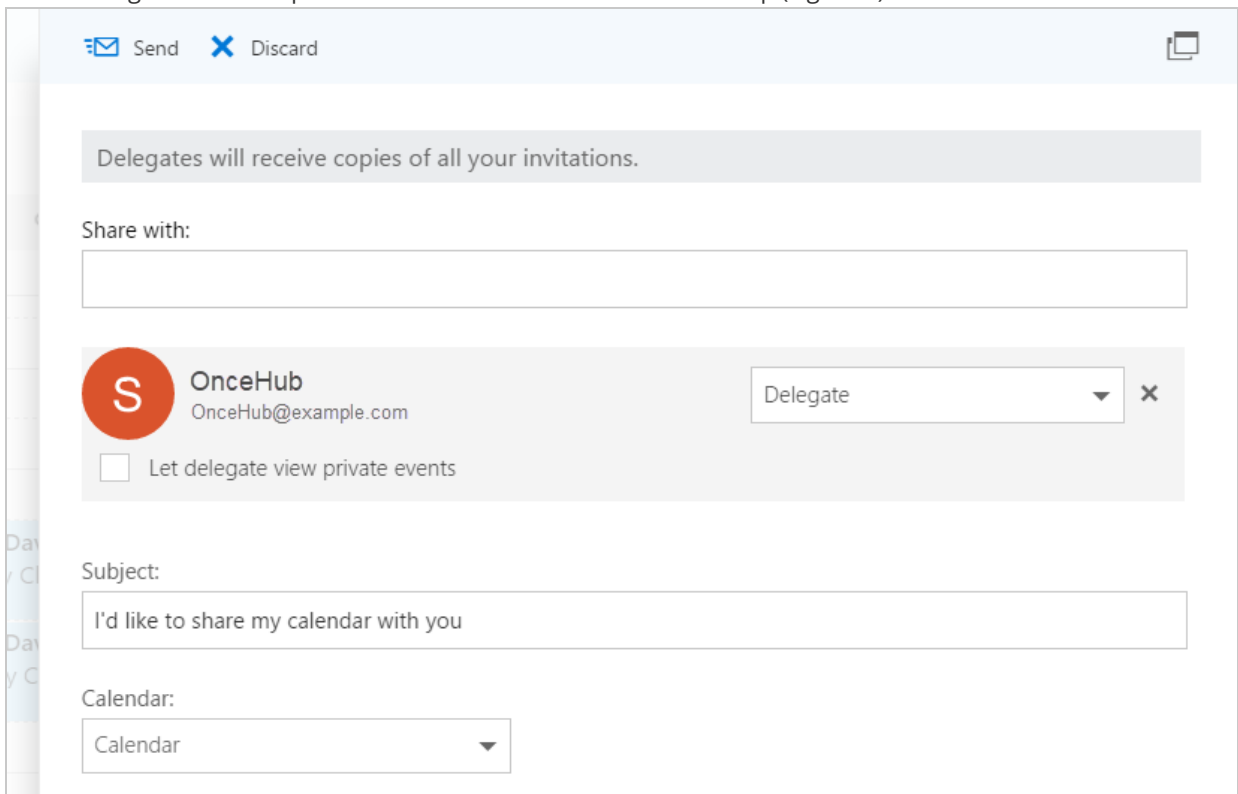


Figure 3: Select Delegate

That's it - you are done! Your calendar is delegated to the dedicated Exchange mailbox, and connected to OnceHub.

How can I set the "From" address for delegate meeting invitations?

To set the "From" address for delegate Exchange folders, an Exchange administrator can set "Send on Behalf" and "Send As" permissions for a delegated Exchange mailbox.

- **Send on Behalf** allows the delegate to select the delegator's account in the From field. The recipient of the meeting invitation will see the following in the From field: "From: Mailbox <delegate's address> on behalf of Mailbox <your address>". "Send on Behalf" permissions can also be set by a delegator in Outlook by selecting

File->Info->Account Settings-> Delegate Access-> and select the delegate and set all Folders to None.

- **Send As** allows the delegate to send invitations that appear to come from the delegator.

Manage delegation permissions

If you need to modify your delegation permissions, right-click your calendar and select Permissions (Figure 4).

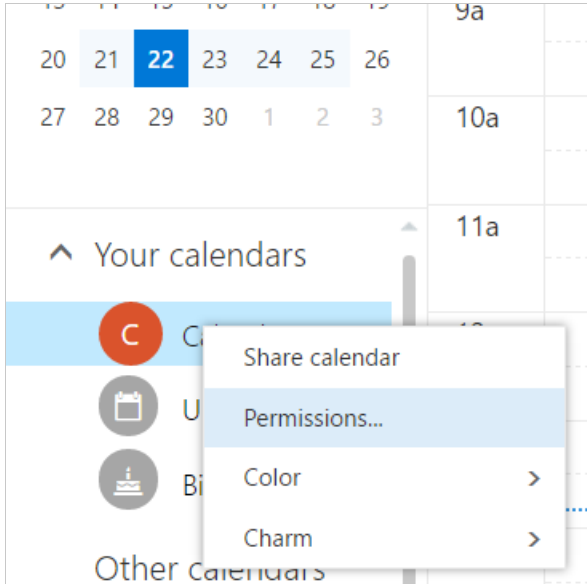


Figure 4: Select Permissions from the drop-down menu

In the Permissions window, you can modify permissions levels and remove users (Figure 5). Remember to click **Save** when done.

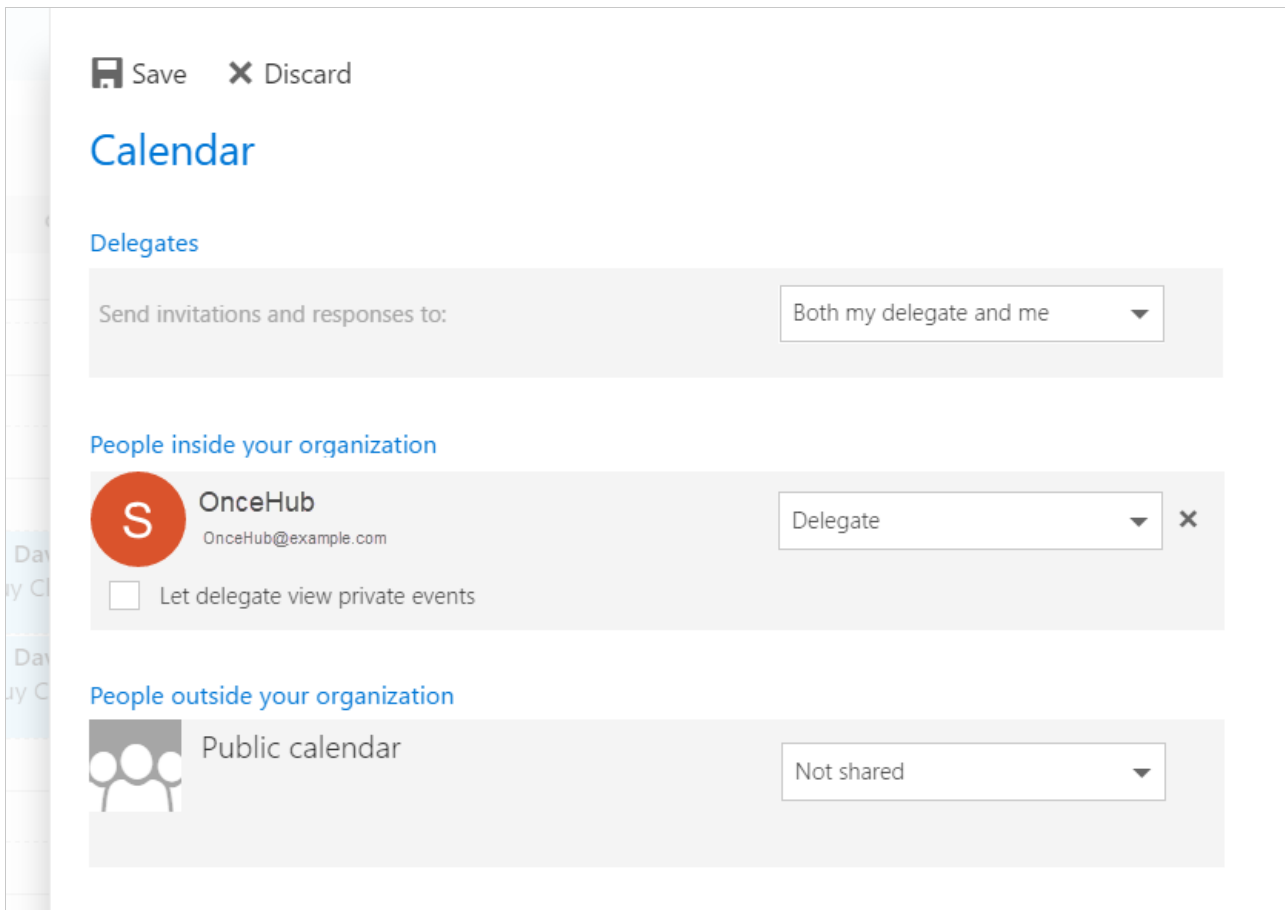


Figure 5: Modify permissions or remove users

Delegation setup: Calendar Delegation setup: Outlook desktop client

This is a User step by step guide to set up delegation in Outlook client on your PC as part of a corporate connection to Exchange. **Follow these steps only when instructed to do so by your Exchange administrator**, because they need to make some organization level setting before you begin to delegate.

Delegation means that you permit a dedicated Exchange mailbox to create and manage events on your behalf. You must delegate if your organization is using Exchange integration in Delegation mode. If you are using Office 365 or Outlook Web App (OWA) in your web browser, see the Office 365 delegation guide instead.

1. Open Outlook on your PC.
2. Click **File -> Account Settings -> Delegate Access** (Figure 1).

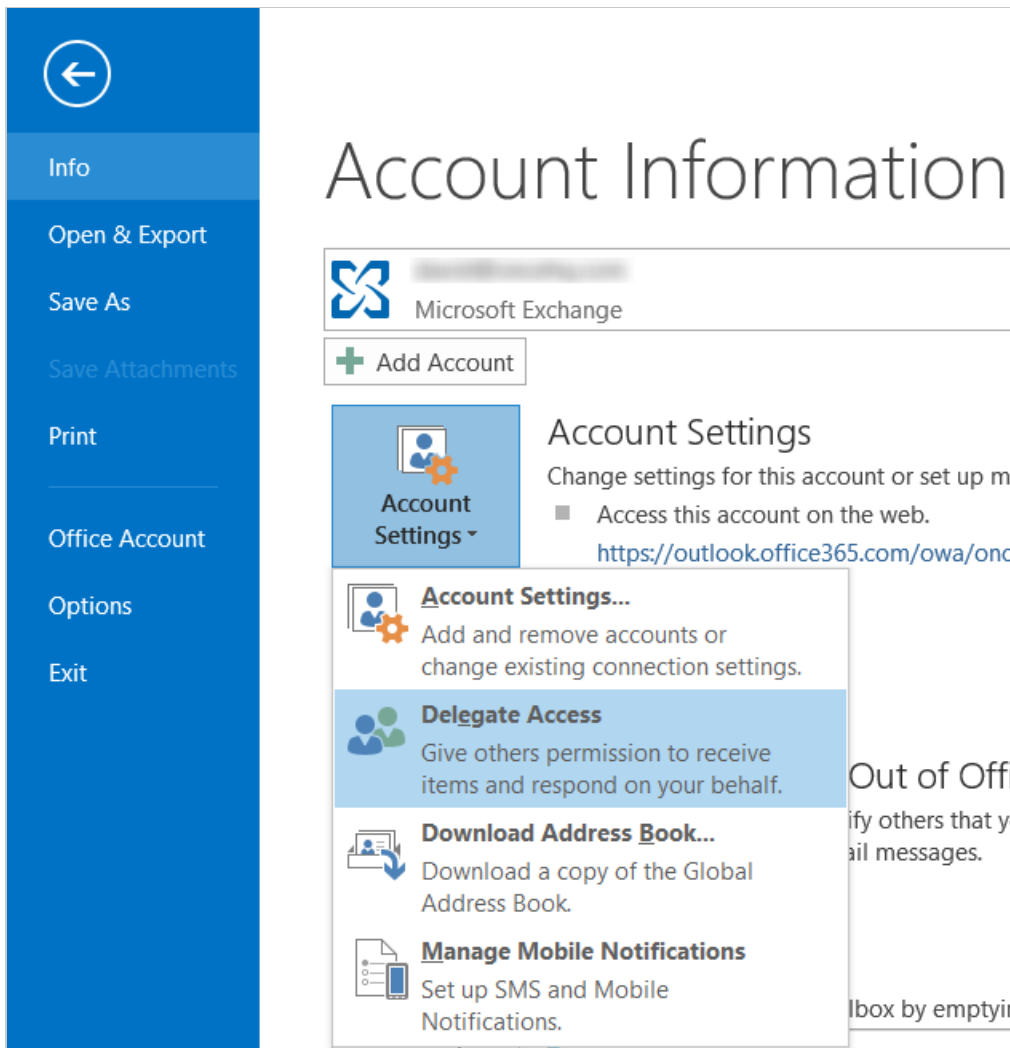


Figure 1: Delegate access

3. In the **Delegates** window click the **Add** button (Figure 2).

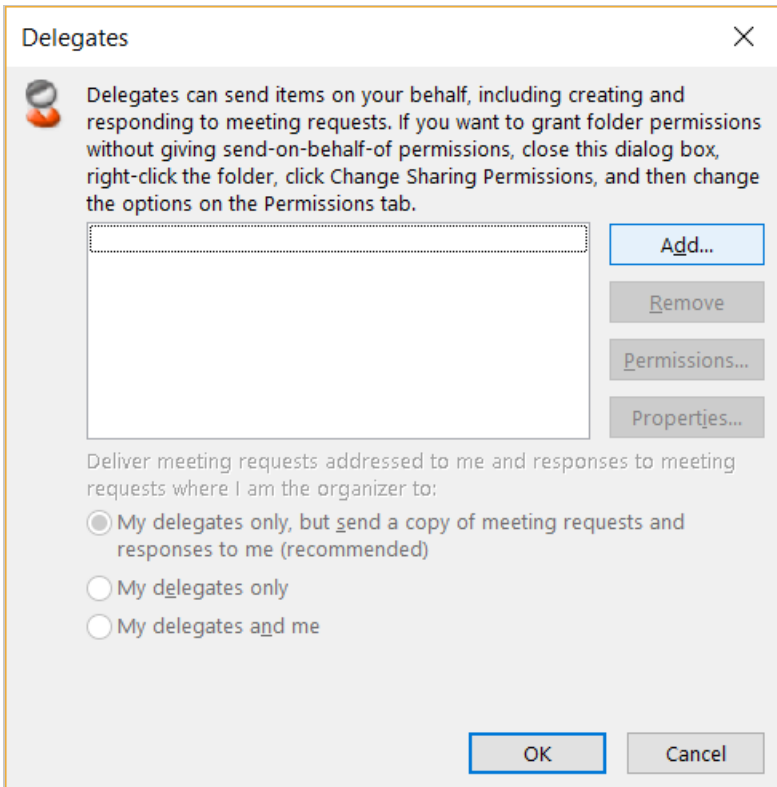


Figure 2: Add a delegate

4. In the **Add Users** window select the dedicated mailbox, OnceHub in this example (Figure 3). Click the **Add** button at the bottom and click OK. If OnceHub mailbox is not present, ask your Exchange administrator to create it first.

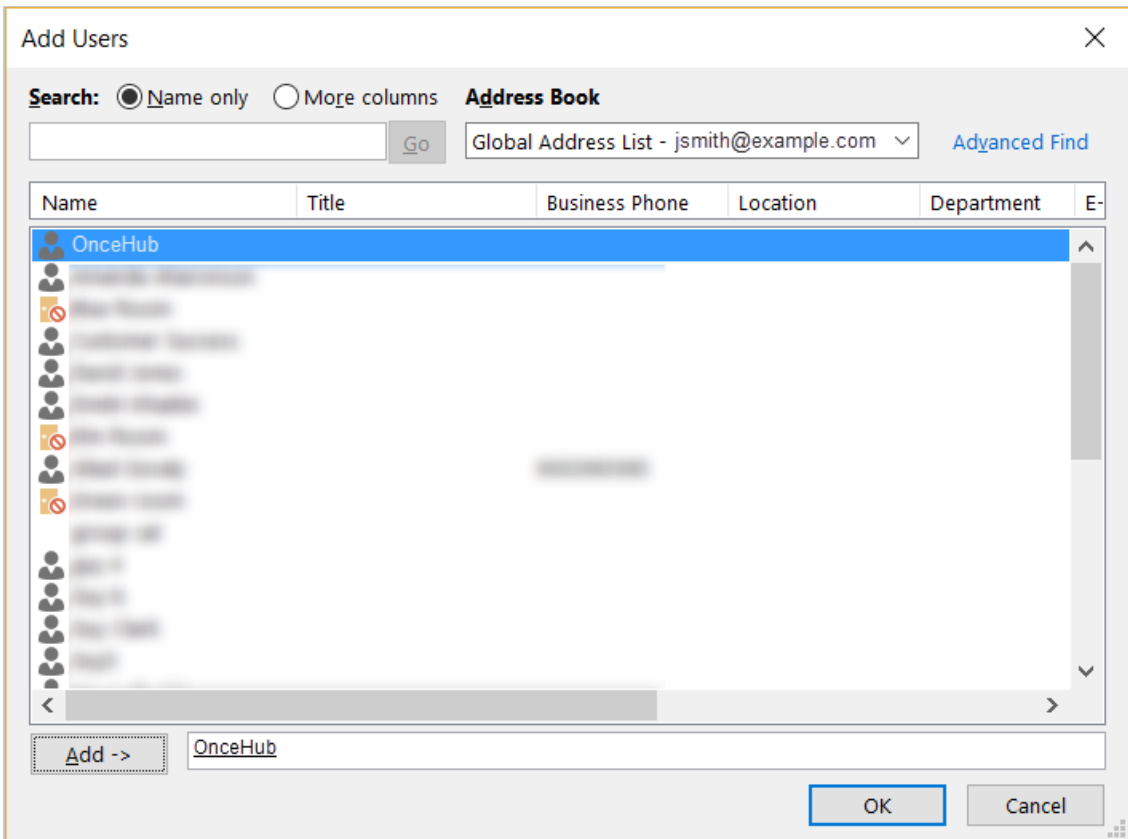


Figure 3: Add Users window

5. In the **Delegate Permissions** window (Figure 4), set the Calendar to Editor permissions. Check the “Delegate

receives copies of meeting-related messages sent to me". Then click **OK**.

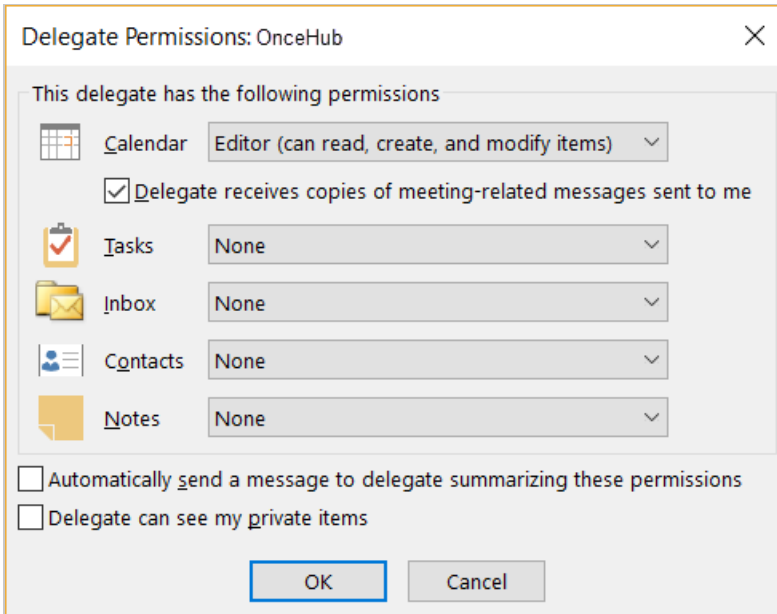


Figure 4: Delegate Permissions window

6. In the **Delegates** window (Figure 5), select the last option "My delegates and me" and click **OK**.

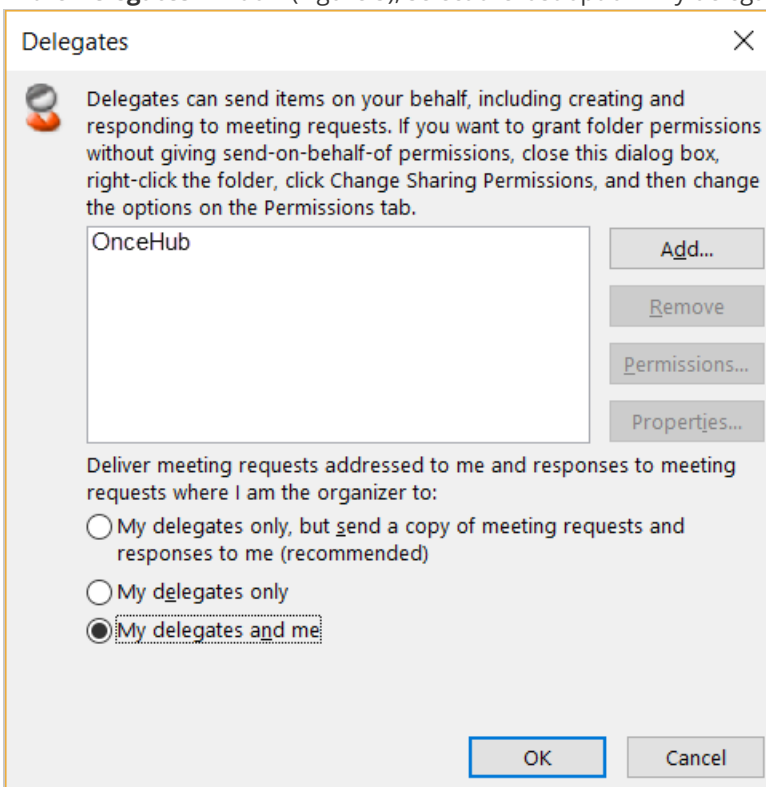


Figure 5: Delegates window with a new User added

That's it - you're done! Your calendar is delegated to the dedicated Exchange mailbox and connected to OnceHub.

When are Exchange/Outlook Calendar events treated as busy in OnceHub?

Exchange/Outlook Calendar has a number of different availability configurations. This setting can be found by editing an individual event, in the "Show as" field (Figure 1).

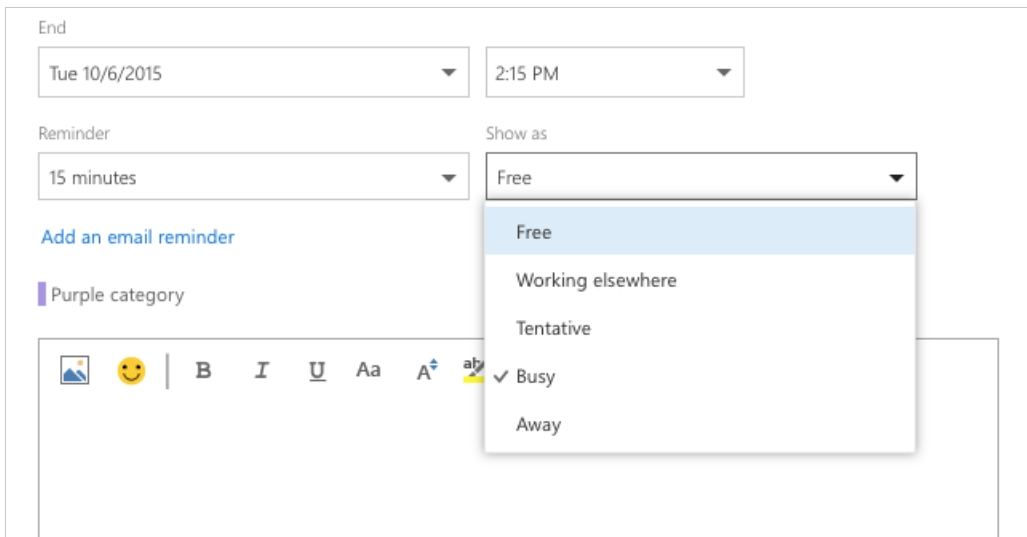


Figure 1: The "Show as" field

1. **Free:** OnceHub will not read this time as busy. This is useful when you want to indicate specific events on your calendar without having those events block your availability.
2. **Working elsewhere:**
 1. **Office 365** or **Outlook for PC** calendar integrations: OnceHub reads this time as busy and blocks availability.
 2. **Exchange** integration through EWS: OnceHub will not read this time as busy.
3. **Tentative:** OnceHub reads this time as busy and blocks availability.
4. **Busy:** OnceHub reads this time as busy and blocks availability.
5. **Away:** OnceHub reads this time as busy and blocks availability.

All-day events in Exchange/Outlook Calendar are set to Free by default. Regular events are set to Busy by default.