



Get Started with
Google: Delegate

Work in Google Mail as a Delegate

A delegate is an individual who has been granted the appropriate permissions to manage another individual's mailbox or calendar.

If someone has assigned you as a delegate on their mail, that means you'll have access to make changes to their email. For the purposes of this guide, we'll assume that someone is your manager.

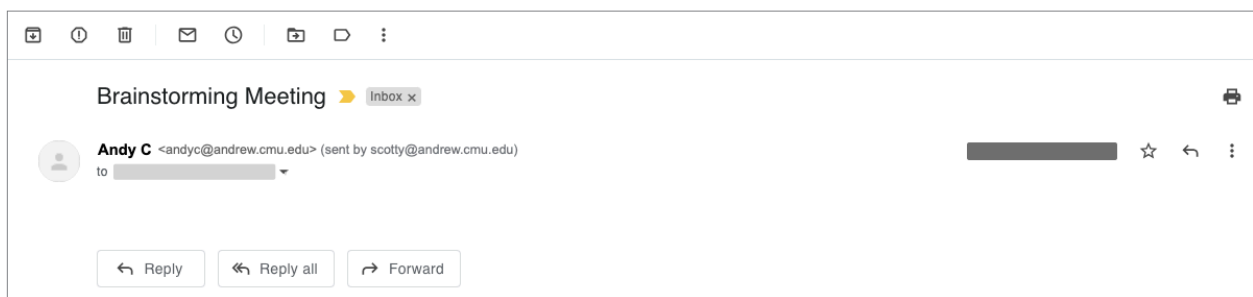
Access Another Individual's Mailbox

Although you can send mail as a delegate from your own mailbox, we do recommend sending messages from within your manager's mailbox.

1. Visit email.cmu.edu.
2. Click your **profile icon** (upper right).
3. Select the **mailbox you are a delegate for** from the drop-down list. Note: A key icon will appear next to the mailbox name along with the text **delegated**.

Send Mail on Your Manager's Behalf

Google recommends accessing your manager's mailbox (above) to send and act on all mail. It's important to note, however, that **messages show as being sent by another individual but with your email address**.



If you need to send mail on behalf of someone else and your name or email cannot appear, you'll want to add your manager's mailbox to your account using Google's **Send mail as** feature.

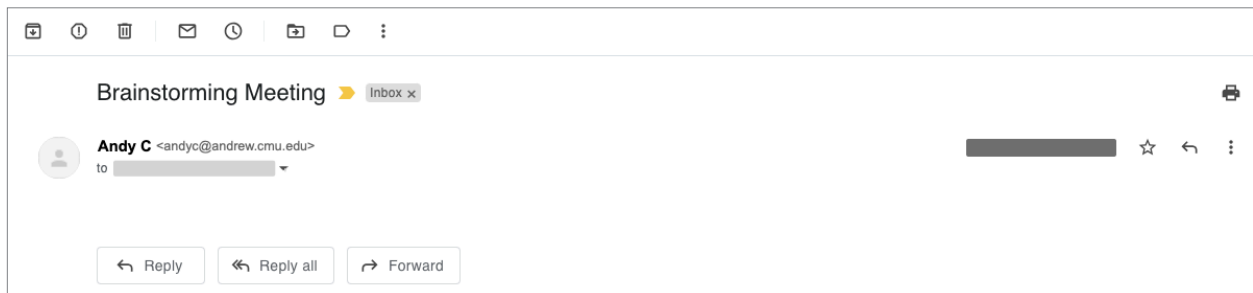
1. Visit email.cmu.edu.
2. Click **Settings** (upper right).
3. Click **See all settings**.
4. Click **Accounts and import**.
5. Under **Send mail as** click **Add another email address**.

6. Enter **your manager's name** and **email address**.
7. Deselect **Treat as alias**.
8. If you would like all replies to come to your account, click **Specify a different "reply-to" address** and enter your email address.
9. Click **Next step**.
10. Click **Send verification**. Your manager will receive an email and they will need to either provide you with a code or click the verification link in the message.
11. Once the account has been verified, return to your inbox and click **the plus sign** (upper left) to compose a new message.
12. Click the **From** drop-down and select your **manager's account**.
13. Proceed with composing and sending the message as you normally would.

Note: If you send mail from your manager's account (rather than sending from your account) and select their address in the From field, the sent mail goes to your manager's sent folder instead of yours.

Filter Delegate Calendar Invitations

To eliminate mailbox clutter, you may want to apply a filter that moves calendar invitations from your mailbox and applies a filter.



1. Visit email.cmu.edu.
2. Click **Settings > See all settings > Labels**.
3. Click **Create new label**.
4. Enter the name **Meetings** for your label and click **Create**.
5. Return to your **Inbox** and click the **down arrow** to the right of the **Search** field.
6. Enter the statement **invite.ics OR invite.vcs** in the **Has the words** field.
7. Enter the **name of the individual** you are a delegate for into the **To** field. Note: Make sure the results that are showing in your Inbox are returning only those messages that you want to filter.
8. Click **Create filter**.
9. Click **Skip the Inbox (Archive it)**.
10. Click **Apply the label**.
11. Click the **Choose label** drop-down and click
12. Enter a **Name** for your label and click **Create**. When new messages arrive, they will automatically be archived and labeled. **New label**. Note: Consider creating a label like "Manager Name - Meetings."

Work in Google Calendar as a Delegate

If someone assigns you as a delegate on their calendar, that means you'll have access to **make changes to events**. For the purposes of this guide, we'll assume that someone is your manager. Specifically, you will be able to do the following on their behalf:

- Respond to event invitations
- Create new events
- Modify previously scheduled events

Your delegate access should already be set up for you in Google Calendar. If you find that your access isn't configured as expected, please contact it-help@cmu.edu.

To view calendars for which you are a delegate:

1. Visit calendar.google.com.
2. Calendars for which you are a delegate appear on the sidebar (left) under **Other calendars**.
3. Click the **checkbox** to the left of a calendar to view it.
4. To customize the calendar color:
 - a. Hover your cursor over the calendar name.
 - b. Click the **menu** that appears to the right of the calendar.
 - c. Click a **color**.

When a new invitation arrives in your manager's inbox, you have the option of managing the invitation from either their email or calendar.

Manage Invites from within Google Mail

If you and your manager have both enabled event notifications for your manager's calendar, the emails will appear as follows:

- In your manager's mailbox with **Invitation:** in the subject line.
- In your mailbox with **New Event:** in the subject line.

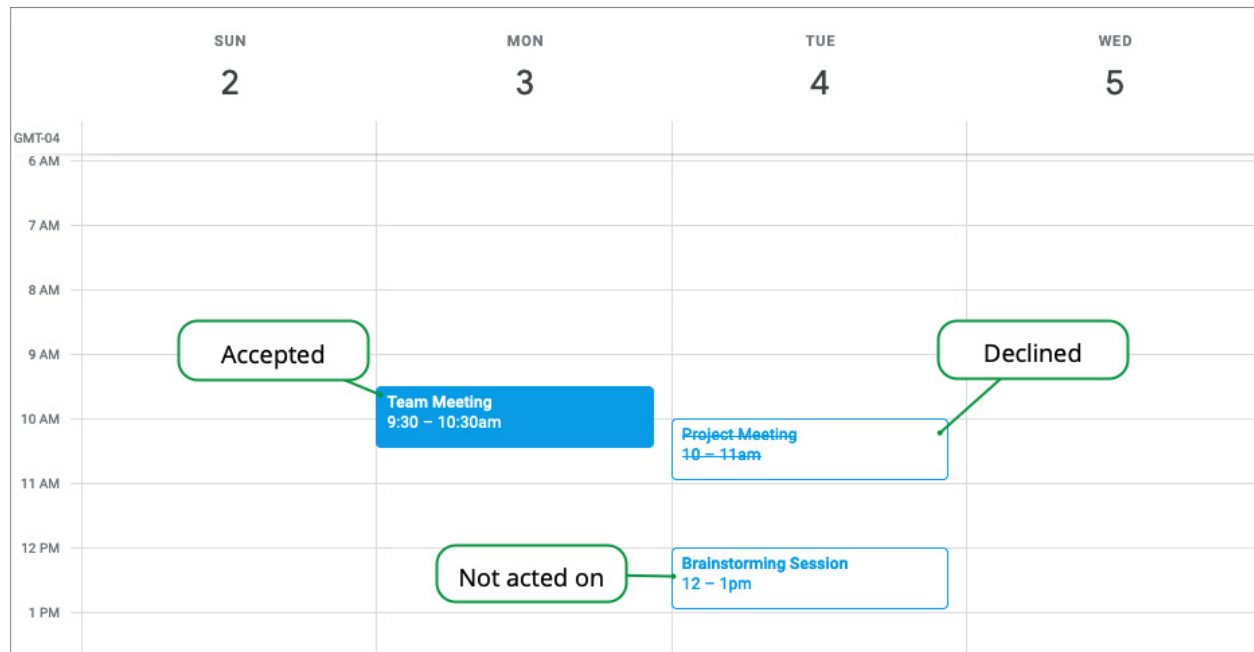
To act on an invitation from Google Mail:

1. Hover your cursor over the invitation and click the **RSVP** button that appears.
2. Click **Yes, Maybe, or No** to indicate your manager's attendance.

Note: Once you act on an invitation, the message will remain in your mailbox with your selection (Yes, Maybe, or No) highlighted. Since this message is only a notification, not the calendar event itself, you can delete it. Notifications must be set up for each individual calendar.

Manage Invites from Google Calendar

You and your manager can always manage event invitations from Google Calendar, whether or not notifications are enabled.



To act on an invitation from Google Calendar:

1. Locate the **invitation** on your calendar.
2. Click the invite to **open it**.
3. Click **Yes, Maybe, or No** to indicate your manager's attendance. Note: Clicking no will not remove the invitation notification from your mailbox. You must delete this after acting on the invite.
4. You may also click the **up arrow** to **propose a new time** or **send a note**.

Note: Once you act on an invitation, the message will remain in your mailbox with your selection (Yes, Maybe, or No) highlighted. Since this message is only a notification, not the calendar event itself, you can delete it.

Visually Track Events

Events appear differently on calendars depending on their status:

- Shaded background: this means that the event has been accepted.
- Non-shaded background: the event has not yet been acted on.
- Non-shaded background/text with strikethrough: the event has been declined.

Hide Declined Meetings

Declined meetings show up on your calendar with a strikethrough by default. You can remove them individually, but you can also update your settings to remove all declined meetings:

1. From within Google Calendar, click **Settings** (upper right) and **Settings** again.
2. Click **View options**.
3. Deselect **Show declined events**.

Receive Notifications for Another Calendar

All notifications for calendars are disabled by default. If you would like to be notified about meetings on calendars for which you are a delegate, you'll need to enable notifications.

To enable notifications:

1. Visit calendar.google.com.
2. Hover your cursor over the calendar name.
3. Click the **menu** that appears to the right of the calendar.
4. Click **Settings**.
5. Click **Event notifications** (left).
6. Change the following types of notifications as desired:
 - a. Event notifications
 - b. All-day event notifications
 - c. Other notifications

Manage Events

You may be asked to create events in a calendar for which you are a delegate.

Create Events on Another's Calendar

1. Visit calendar.google.com.
2. Click **Create (top left)**. The Event Details pop-up window will display.
3. Enter a **title** for the meeting.
4. In the event details window, your calendar should display as the default. Click **your calendar name** then click the calendar and **choose the calendar you would like to schedule on** from the drop-down.
5. Click the **Date and Time** field and indicate if the meeting is **all day** or to specify a **time zone**.
6. Click the **Does not repeat** drop-down to specify when the meeting repeats (if applicable).
7. Add any **guests** you would like to invite to the meeting.
8. Click **Find a time** to view a list of suggested times or click **More options** and then the **Find a time** tab to view open times side-by-side on guest's calendars.
9. Click the **Video conferencing** drop-down and select **Zoom** or Google Meet (if applicable).
10. Add the following additional items as needed:
 - a. **Rooms** - the conference room where the meeting will be held (if applicable).
 - b. **Location** - the physical address of the meeting location (if applicable).
 - c. **Add description** - include details about the meeting.
 - d. **Add attachment** - attach any related materials.
 - e. **Busy** - indicate how the event should appear on a calendar: busy or free.
 - f. **Default visibility** - change this option to list the meeting as **Public** or Private.
 - g. **Notification** - use this section to customize event notifications.
11. Click **More options** for additional features such as customizing guest permissions.
12. Click **Save** to send your meeting invitation.

Edit Event Details

1. From within Google Calendar, click the **event you wish to modify**.
2. Make the necessary changes.
3. Click **Save**.
4. You'll be prompted to **Send** or **not update existing guests**.

Duplicate events

To duplicate an existing event:

1. From within Google Calendar, click the **event you wish to modify**.
2. Click the menu (upper right) then click **Duplicate**.
3. Modify the new event as desired.

Transfer an Event to Another Person

To transfer an event to another person so that they may manage the event:

1. From within Google Calendar, click the **event you wish to modify**.
2. Click the menu (upper right) then click **Change owner**.
3. Search for the **new owner**.
4. Enter a **note** (if desired).
5. Click **Change owner**. Note: The original creator of the event will still appear even though ownership has changed.

Canceled Meetings

Although declined meetings will remain on your manager's calendar with a strikethrough, canceled meetings will simply disappear from the calendar altogether.

If your manager has calendar notifications turned on, they will receive an email. If they do not, then they will not be notified.

One alternative to notifications is to subscribe to a daily agenda:

1. From within Google Calendar, click **Settings (gear icon) > Settings**.
2. Click **your manager's calendar** (left).
3. Click **Other notifications**.
4. Click the drop-down to the right of **Daily agenda** and select **Email**. You will receive a daily email with a list of appointments for any calendar you've enabled it for.

Propose a New Meeting Time

Can't attend a meeting? Propose a new time or add a note to the event that other guests can see.

1. Click the **event** to select it.
2. Click the **up arrow** (bottom right) and choose one of the following options:
 - a. **Propose a new time** - Choose a day and time (left), enter a message (optional), and click **Send proposal**.
 - b. **Add note** - enter your **message** and click **Send**.

Pro Tips

Looking for more Google tips? Check out these features!

Display an Additional Time Zone

1. From within Google Calendar, click **Settings** (upper right) and **Settings** again.
2. Click **Time zone**.
3. Click **Display a secondary time zone**.
4. Select the **Secondary** time zone from the list.
5. Enter **labels** for the time zones as desired.
6. When you return to your mailbox the **time zones will display to the left of your calendars**.

Use Tasks in Calendar

To show Google Tasks in your Google Calendar:

1. Click **Tasks** under **My Calendars**. A list of all of your Google Tasks will display on your calendar.
2. To **add a task directly to your calendar**, click **Create** and click **Task**.
3. Enter the **date, time, and description**, then click **Save**.

Add Calendars of Interest

Google offers a variety of additional calendars, including international and religious holidays and the conference rooms you use most often.

1. Click the **plus** to the right of **Other Calendars**.
2. Click **Subscribe to a calendar** and use any of the following options.
 - a. Enter a **search term** to locate a calendar or person. Note: enter **2020-2021 Academic Calendar** to add the CMU academic calendar!
 - b. Click **Browse resources** to view a calendar for specific conference rooms.
 - c. Click **Browse Calendars of interest** to search for calendars for international and religious holidays—a must-have to ensure everyone is included when you're planning events.
 - d. You can also add calendars **By URL** if you have a link to an existing Google calendar.

Group Tabs in Chrome

Chrome now allows you to group tabs. Although they won't save when you close Chrome, they will allow you to simplify your work in the browser. To group tabs:

1. Right-click on any open tab in Chrome and select **Add Tab to New Group**.
2. Enter a **Name** for the group and select a color. The group name will display to the left of the tab.
3. To **add other tabs to the group**, drag and drop them onto the group you just created. This is a great way to group related work in a browser or multiple calendars or email accounts together.