# Delegate Access

Delegate access is used to grant another user access to your folders, e-mail, meeting requests, and calendar. Delegates may be granted permission to read, create, or modify items.

Note: Delegates must use the same version of the Outlook client.

#### **Assigning Delegate Access**

- 1. On the File tab, click Account Settings.
- 2. Click Delegate Access.

The Delegate window opens.

3. Click the Add button.

The Add Users window opens.

- 4. Search for and select the person to be grated delegate access.
- 5. Click the Add button.
  - Tip: Repeat steps 4-5 to select additional delegates.
- 6. Click the Ok button.
- 7. Define delegate permissions.
  - *Tip:* To send a message to notify the delegate of permissions, select the Automatically send a message to delegate summarizing these permissions check box.
- 8. Click the Ok button.

The Permissions window closes and the focus is returned to the Delegates window.

9. Click the Ok button.

Note: Messages sent with Send on Behalf permissions include both the delegate's name and your name in the from field. **Caution!** You should not rely on the Private feature to prevent other people from accessing the details of your appointments, contacts, or tasks. A person who is granted Reviewer (can read items) permission to access your folders could use programmatic methods or other e-mail programs to view the details of a private item.

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Account Information

Rules and Alerts

Manage Apps

count and Social Network Settings

Out of Office

RSelbeel@unm.edu

1

(	) My dele <u>c</u>	9 OK Cancel						
Delegate Permissions: Abiah Grant								
		the following permissions						
	Calendar	Editor (can read, create, and modify items) 👻						
	🔽 Delega	te receives copies of meeting-related messages sent to me						
Ż	Tasks	Editor (can read, create, and modify items)						
	Inbox	None						
2=	Contacts	None 🔻						
	Notes	None						
	-	nd a message to delegate summarizing these permissions my private items OK Cancel						



# window.

7. Click the Ok button.



#### the delegate for whom you want to change permissions. Click the permissions button. Delegates 2 The delegate permissions window opens. Modify the permissions as needed.

Communicate Collaborate Connect

5.

Delegate Access

opens.

1.

2.

3

4

**Modifying Delegate Permissions** 

Click Delegate Access.

The Delegate window

Select the name of

On the File tab. **click** 

Account Settings.

Tip: To send a message to notify the delegate of permissions, select the Automatically send a message to delegate summarizing these permissions check box.

6. Click the Ok button. The Permissions window closes and the focus is returned to the Delegates



Cancel

x

5.

My delegates and me

egate Permissions: Abiah Grant

Tasks

Notes

Delegate can see

2 Contacts None

his delegate has the following permissions

Calendar Editor (can read, create, and modify items)

Automatically send a message to delegate summarizing these permissions

Cancel

m 6 ate items

OK

Delegate receives copies of meeting-related messages sent to me

Editor (can read, create, and modify items)

5

Account Information



For delegates or share recipients to view a folder, mail or calendar, the folder must be visible for the recipient to view it.

Ser 📕 New Folder...

De 📑 <u>R</u>ename Folde

🕻 Ca 🛀 Copy Folder

Move Folder

F 🙆 Mark All as Read

K 🍋 Clean Up Folder

S Remove from Eavorites

S Al Sort Subfolders A to Z

Properties...

Convert "Inbox" to Adobe PDF

🚓 Append "Inbox" to Adobe PDE

L 底 Delete <u>A</u>ll

Move Up

(1)Move Dow

Delete Folder

Dra 🔁 Open in New Window

Right click the correct 1. folder and select properties. The folder properties

window opens. Click the Permissions

- 2. tab.
- 3. Select the correct user.
- 4 Click the Folder Visisble checkbox.
- 5. Click the OK button.

#### **Removing Delegate Access**

- 1 On the File tab, click Account Settings.
- 2. **Click Delegate Access.**

The Delegate window opens.

- Select the name of the delegate for whom 3. you want to remove access.
- Click the Remove button. 4.
  - Tip: Repeat Steps 3-4 to remove additional delegates.
  - Click the OK button.



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Account Informatic



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## Delegate Access

#### Viewing a Delegated Inbox

- 1. On the File tab, **select Info**.
- 2. Click the Account Settings icon.
- 3. Select Account Settings. The Account Settings window opens.
- 4. Click the E-mail tab.
- 5. Select your e-mail account.
- 6. Click the Change button. The Change Account window opens.
- Click the More Settings button.
   The Microsoft Exchange window opens.
- 8. Click the Advanced Tab.
- 9. Click the Add button. The Add Mailbox window opens.
- 10. **Type** the **username** of the person whose inbox you wish to display.
- 11. Click the OK button.

The Add Mailbox window closes and focus is returned to the Microsoft Exchange window. The selected user should now display in the additional mailboxes field.

12. Click the OK button.

The Microsoft Exchange window closes and focus is returned to the Change Account window.

- 13. Click the Next button.
- 14. Click the Finish button.
- 15. Click the Close button.

The delegated inbox displays in the Mail folder list and may be viewed as necessary.



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## Delegate Access

#### Sending E-mail as a Delegate

- 1. **Click** the **New Mail** icon to begin a new mail message.
- 2. Click the From field icon.
  - **Tip:** If the from field is not visible, click the Options tab and then click the From icon.

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- 3. **Select** the **person** for who you are sending the e-mail on their behalf.
  - **Tip:** If the person's name is not listed, click the Other E-Mail Address option and select the person who this e-mail is being sent for. Once selected in this manner, they will show up in the list.
- 4. **Compose** the **e-mail** as usual and **click** the **Send** icon
- Note: By default, Outlook automatically stores a copy of the e-mail in the account of the person who created the e-mail (i.e. the delegate), not the person you are sending on behalf of. If you wish the person you are sending on behalf of to receive a copy, you should include them in the e-mail on either the To, CC, or BCC line.



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### Delegate Access

#### Viewing a Delegated Calendar

To view a delegated calendar, you must add it to your calendar list.

- 1. On the File tab, **click Open & Export**.
- 2. Click Other User's Folder. The Open Other User's Folder dialog box opens.
- 3. Click the Name button. The Select Name window opens.
- 4. **Select** the **name** of the calendar owner.
- 5. Click the OK button.

The Select Name window closes and the focus is returned to the Open Other User's Folder dialog box.

- 6. **Select Calendar** in the folder type field.
- 7. Click the OK button.

The delegated calendar appears while in the Outlook calendar view. To view the calendar check its selection box. To hide the calendar, uncheck its selection box.

Inbox	- RSelbee1@unm.edu - Outlook	? – 🗆 ×	Select Name: Global Addres	ss List	
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• Open			t100	Go Global Address List - RSelbee1@unm.ec	
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## Delegate Access

#### **Responding to Delegated Meeting Requests**

If you have been granted delegate access to another person's calendar, you will receive meeting requests for that calendar and may accept them as necessary.

1. In your Inbox, **double click** the **meeting request**.

The Meeting request window opens.

- 2. Click one of the following options:
  - Accept Accept the invitation.
  - **Tentative** Tentatively accept the invitation.
  - **Decline** Decline the invitation.
  - Propose New Time Propose a different time for this meeting.
  - **Respond** Send an e-mail message to the meeting organizer, forward this meeting request, or contact the attendees of this meeting.
- Note: The response received by the meeting organizer will appear showing "...on behalf of".



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