HSC Link
Communicate Collaborate Connect

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.*
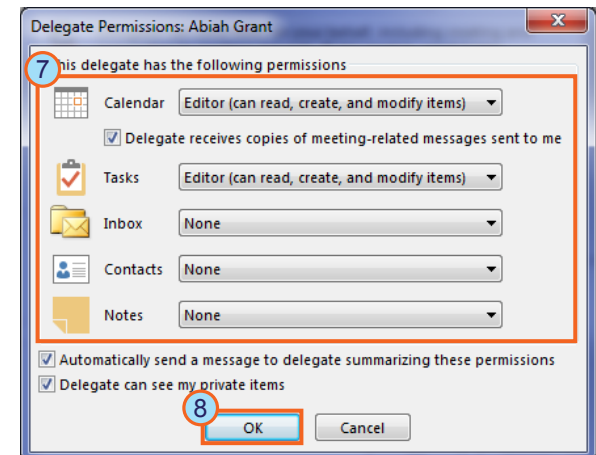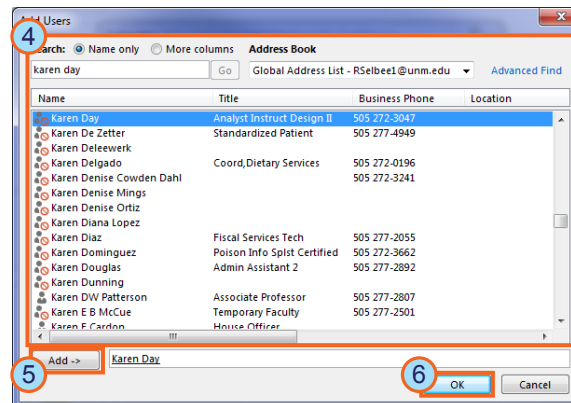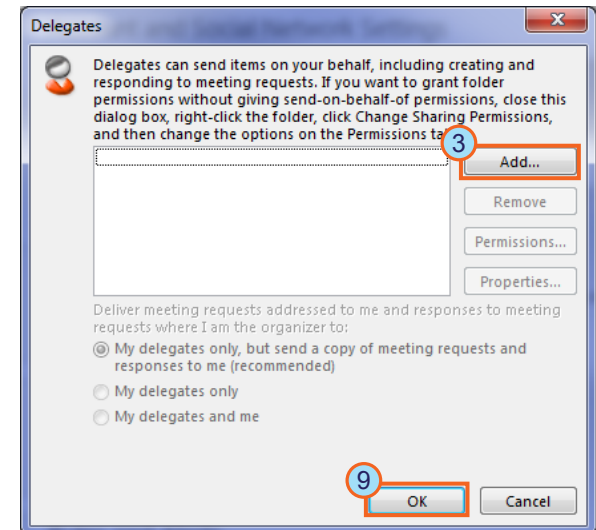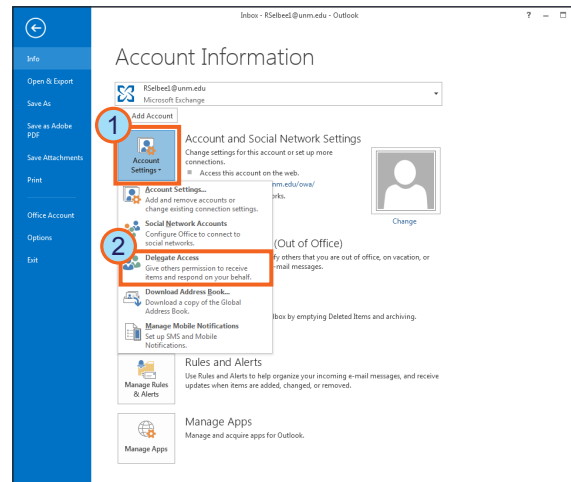

⚠️ ***Caution!*** *You should not rely on the Private feature to prevent other people from accessing the details of your appointments, contacts, or tasks. A person who is granted Reviewer (can read items) permission to access your folders could use programmatic methods or other e-mail programs to view the details of a private item.*
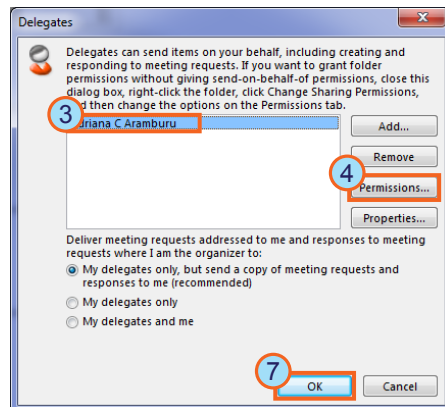
Modifying Delegate Permissions

1. On the File tab, **click Account Settings**.

2. **Click Delegate Access**.

   The Delegate window opens.

3. **Select** the **name** of the delegate for whom you want to change permissions.

4. **Click** the **permissions** button.
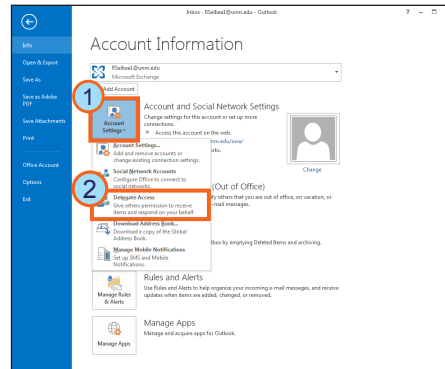
   The delegate permissions window opens.

5. **Modify** the **permissions** as needed.

   💡 *Tip:* To send a message to notify the delegate of permissions, select the Automatically send a message to delegate summarizing these permissions check box.
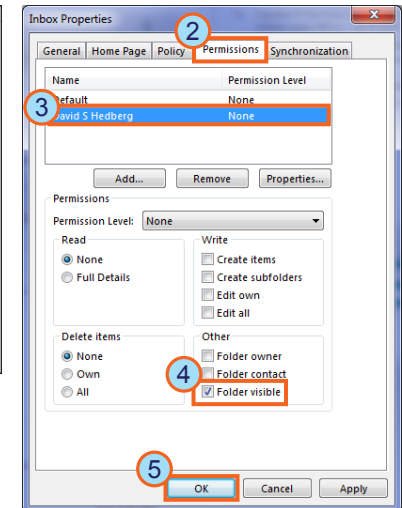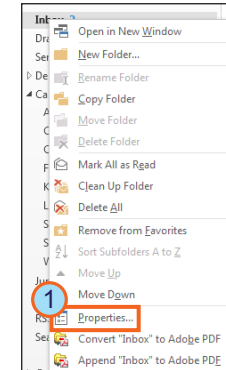
6. **Click** the **Ok** button.

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

7. **Click** the **Ok** button.
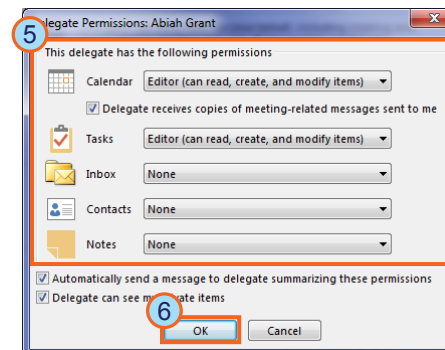
Folder Visibility

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

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

   The folder properties window opens.

2. **Click** the **Permissions** 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.

3. **Select** the **name** of the delegate for whom you want to remove access.

4. **Click** the **Remove** button.

   💡 *Tip:* Repeat Steps 3-4 to remove additional delegates.

5. **Click** the **OK** button.
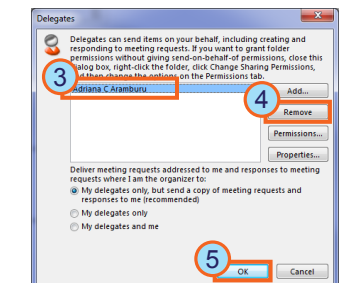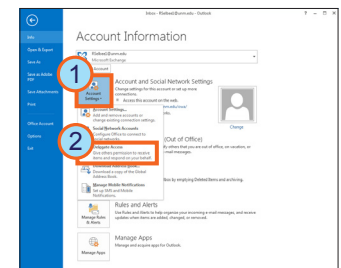
Delegate Access

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.

7. **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.*

Delegated Mailbox
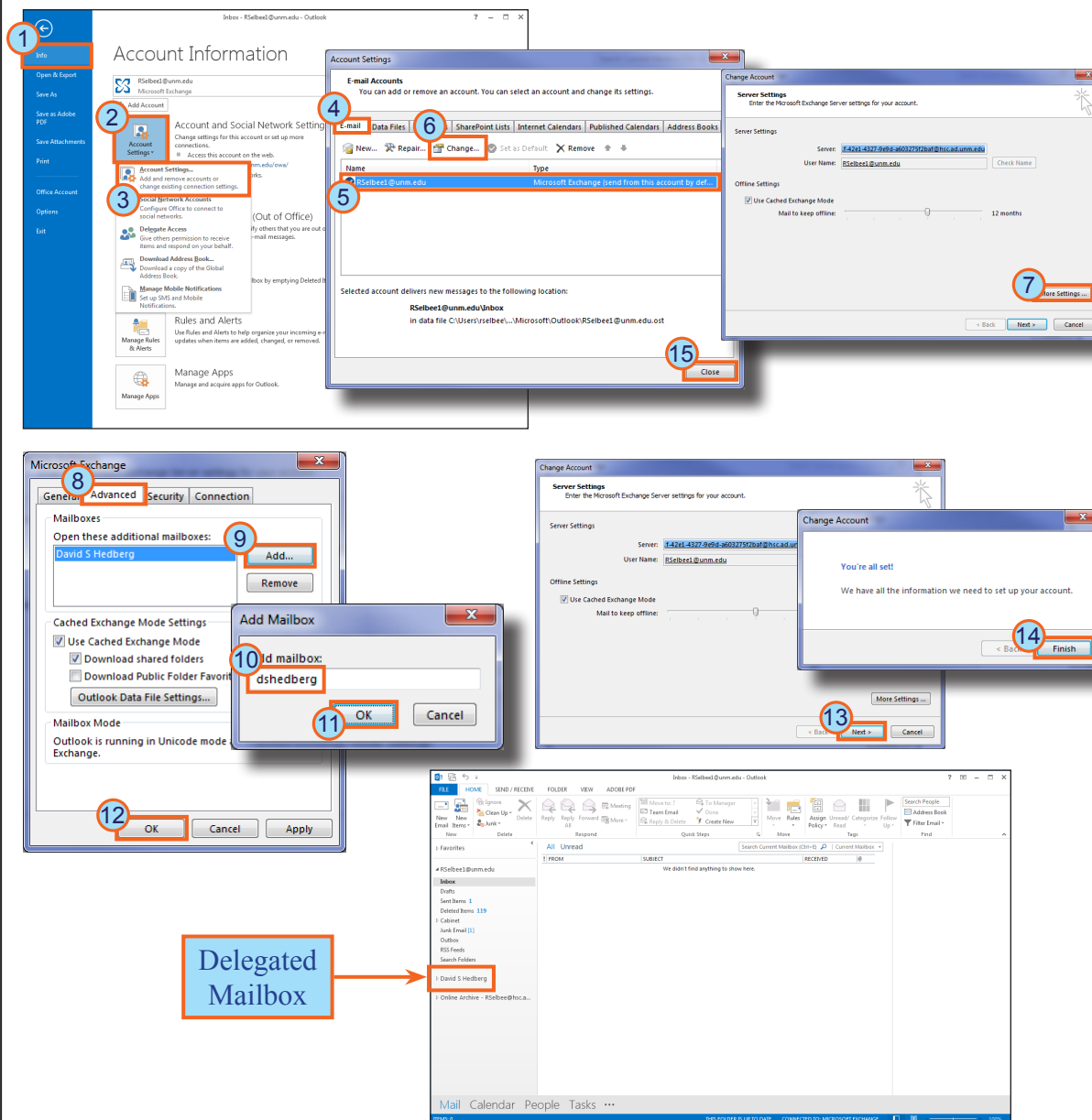
Sending E-mail as a Delegate

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.*

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.*
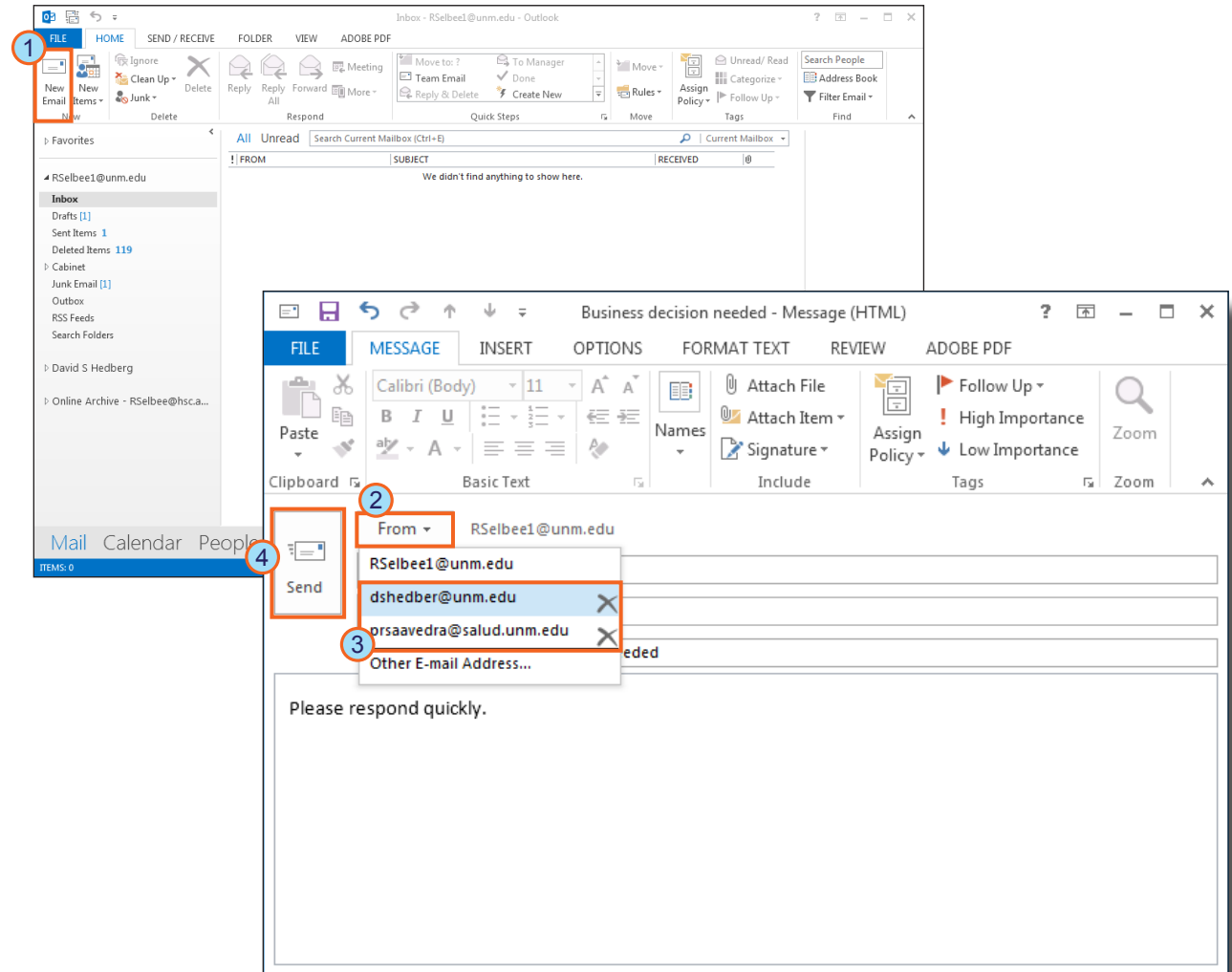
Viewing a Delegated Calendar

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.

Delegated Calendar Selection

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".