

## DELEGATE ACCESS

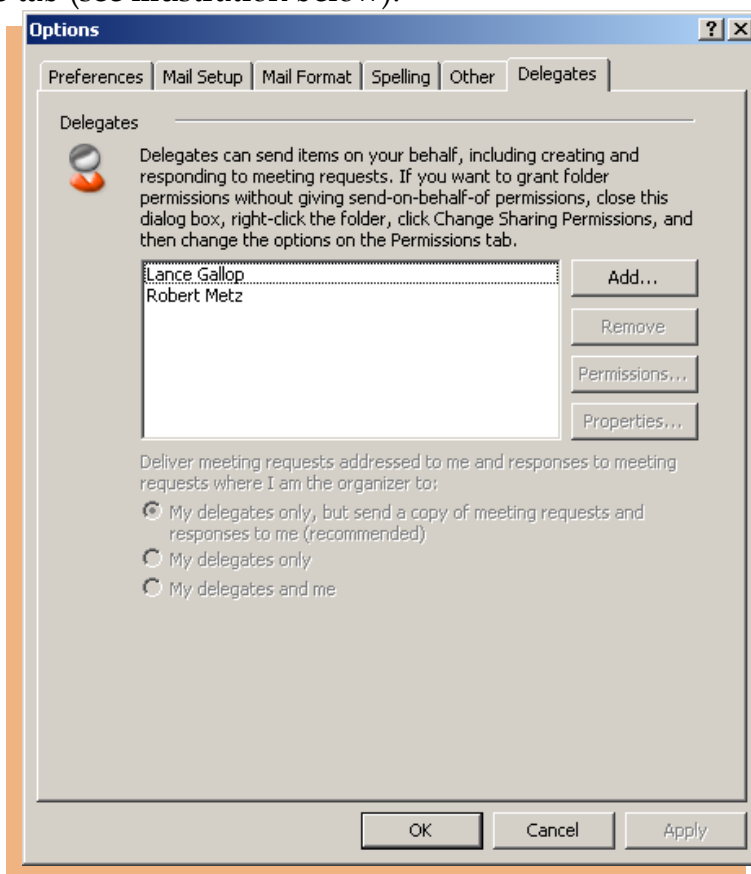
A delegate is a person who has permission to access someone else's folders. It is possible to have more than one delegate with each one having different permissions. Depending on the different permissions level, a delegate may read, create, modify, and delete items from the designated folder. Delegate permission can be granted to your Calendar, Tasks, Inbox, Contacts, Notes, and Journal folders. If more than one delegate is assigned to a folder, all delegates receive the same permissions level.

### NOTES:

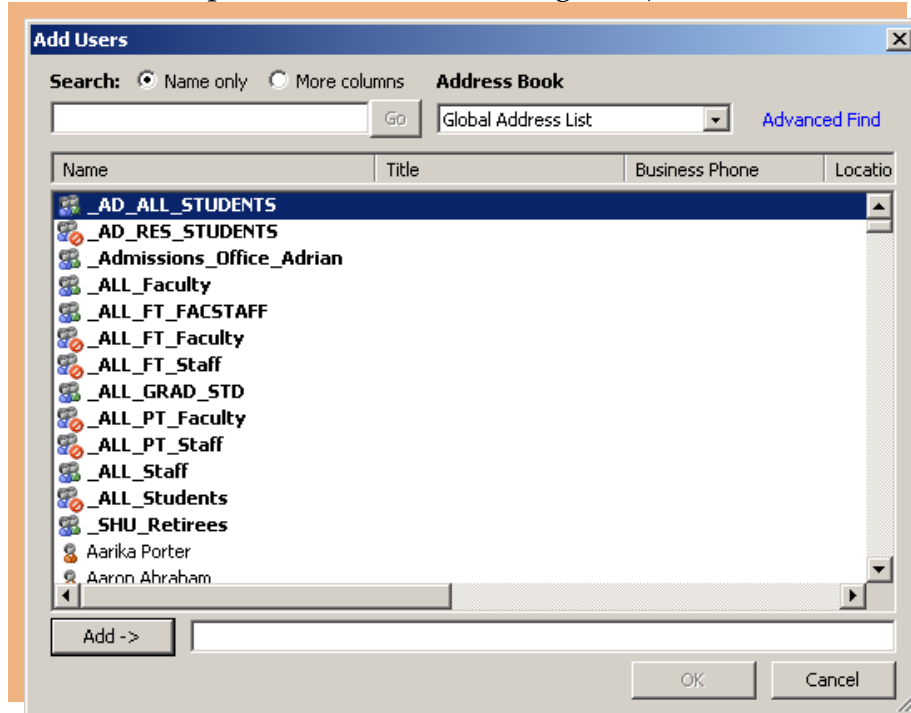
- ✚ With author or editor permission, the delegate has **send-on-behalf-of permission**.
  - ✦ Sent messages contain both the supervisor's and delegate's names.
  - ✦ Message recipients see the supervisor's name in the **Sent On Behalf Of** box and the delegate's name in the **From** box.
- ✚ If a delegate needs permission to deal with meeting requests and responses only, the supervisor can select the **Send meeting requests and responses only to my delegates, not to me** check box on the **Delegates** tab and does not need to grant permission to his **Inbox**.
  - ✦ Meeting requests and responses will go directly to the delegate's **Inbox**.
  - ✦ The delegate will need editor permission to the supervisor's **Calendar** folder, because once they respond to the meeting on behalf of the supervisor, the meeting is automatically added to the supervisor's **Calendar** folder.

### DEFINING AND SETTING SHARING PERMISSIONS FOR DELEGATES

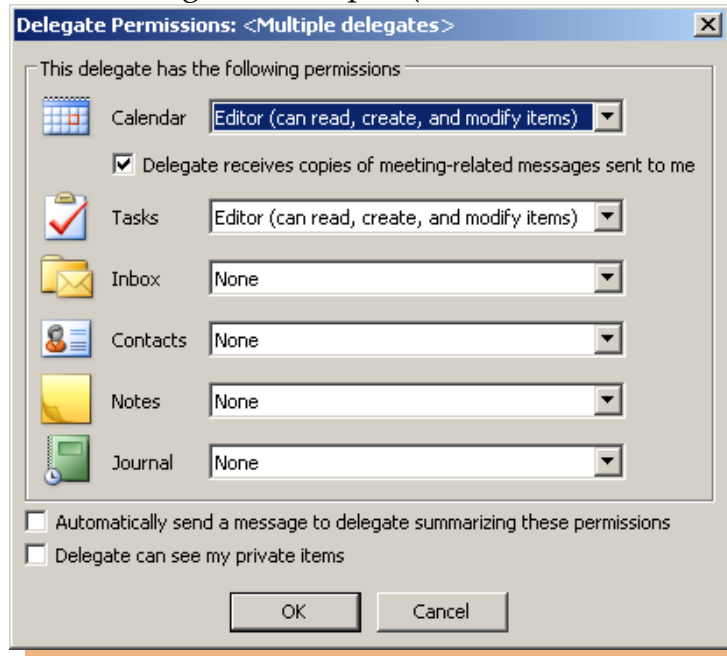
- ✚ Click **Tools** on the **Menu Bar**.
- ✚ Click **Options** from the list of choices.
- ✚ Click the **Delegates** tab (see illustration below).



✚ Click the **Add** button to open the **Add Users** dialog box (see illustration below).



- ✚ From the **Address Book** list arrow, click the **Global Address List**, if necessary.
- ✚ In the **Search** box, enter the name of the delegate you want to set permissions for.
- ✚ Click the delegates name in the list.
- ✚ Click the **Add** button to add the name to the **Add Users** list.
- ✚ Continue this process until all delegates have been selected.
- ✚ Once all the names have been chosen, click **OK**.
- ✚ The **Delegate Permissions** dialog box will open (see illustration on next page).



- ✚ For each Outlook item click the list arrow and then select the appropriate permission level. These permission levels are:
  - ✚ **None** – Delegates cannot open a folder and cannot read, create, or modify items.
  - ✚ **Reviewer** – Delegates can read items, but cannot create, modify, or delete items.

- ✦ **Author** – Delegates can read and create items, and can modify and delete only items they created.
- ✦ **Editor** – Delegates can read, create, modify, and delete any items.
- ✦ For additional information on these Permissions, see the link on Sharing Folders.
- † Click the **Automatically send a message to delegate summarizing these permissions** check box to insert a check mark.
- † Outlook will send a message to the delegates notifying them of their delegate status and permissions.
- † Click the **Delegate can see my private items** check box to insert a check mark if you want delegates to be able to view your private items.
  - ✦ Private items may be set when scheduling an appointment by clicking the **Private** button under the **Appointment Tab** in the **Options Group**.
  - ✦ Private items would be such things as doctor appointments or meetings with students that you don't want others to view.
  - ✦ An appointment item will display in the Calendar, but the delegate will not be able to view the item.
- † Click the **OK** button in the **Delegate Permissions** dialog box to accept the changes and exit the dialog box.
- † Click the **OK** button in the **Options** dialog box to exit this area.

#### ALLOWING DELEGATE TO SEE PRIVATE APPOINTMENTS

If another person has been given Delegate Access to any of your folders, it is possible for you to hide personal information. Open each personal item, and then select the **Private** check box. To override this setting, do the following:

- † Click **Tools** on the **Menu Bar**.
- † Click **Options** from the list of choices.
- † Click the **Delegates** tab.
- † In the list, click the delegate that you want to allow to see your private appointments.
- † Click **Permissions**.
- † Click the **Delegate can see my private items** check box.
- † Click **OK** to exit the **Permissions** dialog box.
- † Click the **Apply** button and then click **OK** to exit the dialog box.

#### CHANGING PERMISSIONS FOR A DELEGATE

- † Click **Tools** on the **Menu Bar**.
- † Click **Options** from the list of choices.
- † Click the **Delegates** tab.
- † Click the delegate whose permissions you want to change.
- † Click the **Permissions** button.
- † Change the permissions for any of the Microsoft Outlook folders that the delegate has access to.
- † To send a message to notify the delegate of the changed permissions, select the **Automatically send a message to delegate summarizing these permissions** check box.
- † If you want copies of your meeting requests and responses sent to your delegate as well as to you:
  - ✦ Give the delegate **Editor Permissions** to your Calendar folder.
  - ✦ Select the **Delegate receives copies of meeting-related messages sent to me** check box.

- ✚ Click **OK** to exit the **Delegate Permissions** dialog box and save the changes.
- ✚ Click **OK** again to exit the **Options** dialog box.

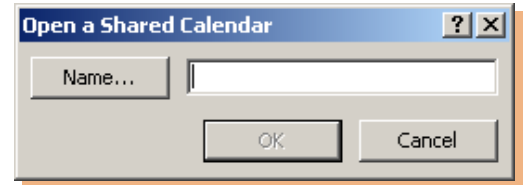
### VIEWING OTHER USER'S CALENDARS

To view a folder after a person has been assigned Delegate Access:

- ✚ Do one of the following:
  - ✦ Click **File** on the **Menu Bar**, choose **Open** from the list of options, and then click **Other User's Folder** from the menu options.
  - ✦ In the **Calendar** window, click the **Open a Shared Folder** link.

✚ The **Open a Shared Folder** dialog box will appear (see illustration at right).

✚ Click the **Name** button to display the **Select Name** dialog box.



✚ Make sure that **Global Address Book** is selected under **Show Names from the** box.

✚ Input a name to search for in the **Select Name** dialog box.

✚ When the name is displayed, select it.

✚ Click the **Add** button.

✚ Click **OK** to accept the change and close the dialog box.

✚ Click **OK** again to exit the **Open a Shared Calendar** dialog box.

✚ Once the options for viewing the Calendar have been specified, the name will appear on the **Navigation Pane** under **Other Calendars**.

✚ To display the other Calendar, click the check mark next to the Calendar.