

## DELEGATE ACCESS TO YOUR EMAIL AND CALENDAR

Similar to having an assistant help you manage your incoming paper mail, you can use Microsoft Outlook to allow another person, known as a delegate, to receive and respond to e-mail messages and meeting requests and responses on your behalf. You can also grant additional permissions that allow your delegate to read, create, or have more control over items in your Microsoft Exchange Server mailbox.

**Note:** A [Microsoft Exchange Server account](#) is required.

### DELEGATE ACCESS

Beyond merely sharing Outlook folders, Delegate Access enables you to grant additional permissions, such as allowing a delegate the ability to create e-mail messages or respond to meeting requests on your behalf.

#### Notes:

- As the manager, your mail must be delivered to your mailbox on the Exchange server, not to an Outlook Data File (.pst) on your computer.
- You and the delegate must use the same version of Outlook.
- As the person granting permission, you determine the level of access that the delegate has to your folders. You can grant a delegate permission to read items in your folders or to read, create, change, and delete items. By default, when you add a delegate, the delegate has full access to your Calendar and Tasks folders. The delegate can also respond to meeting requests on your behalf.

### DELEGATE PERMISSION LEVELS

The delegate permission levels are as follows:

**Reviewer:** With this permission, the delegate can read items in the manager's folder.

**Author:** With this permission, the delegate can read and create items, and change and delete items that he or she creates. For example, a delegate can create task requests and meeting requests directly in the manager's **Task** or **Calendar** folder and then send the item on the manager's behalf.

**Editor:** With this permission, the delegate can do everything that an Author has permission to do and additionally can change and delete the items that the manager created.

### TURN ON DELEGATE ACCESS

A delegate automatically receives Send on Behalf permissions. By default, the delegate can read only the meeting requests and responses sent to the manager. The delegate does not have access to read any other messages in your **Inbox**.

#### To turn on Delegate Access:

1. Click the **File** tab.
2. Click **Account Settings**, and then click **Delegate Access**.
3. Click **Add**.

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### If you don't see the Add button

The **Add** button might not be visible because of one or more of the following:

- An active connection does not exist between Outlook and Exchange. The Outlook status bar should display **Connected to Microsoft Exchange** or **Online**.
  - Your messages are not being delivered to your Exchange mailbox. Your e-mail must be delivered to your Exchange mailbox, not to an Outlook Data File (.pst) on your computer hard disk.
4. Type the name of the person whom you want to designate as your delegate, or search for and then click the name in the search results list. The delegate must be a person in your organization's Exchange Global Address List.
  5. Click **Add**, and then click **OK**.

In the **Delegate Permissions** dialog box, you can accept the default permission settings or select custom access levels for Exchange folders.

If a delegate needs permission to work only with meeting requests and responses, the default permission settings, including **Delegate receives copies of meeting-related messages sent to me**, are sufficient. You can leave the **Inbox** permission setting at **None**. Meeting requests and responses will go directly to the delegate's **Inbox**.

**Note:** By default, the delegate is granted **Editor (can read, create, and modify items)** permission to your **Calendar** folder. When the delegate responds to a meeting on your behalf, it is automatically added to your **Calendar** folder.

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, select the **Delegate can see my private items** check box.

**Important:** This is a global setting that affects all of your Exchange folders, including all Mail, Contacts, Calendar, Tasks, Notes, and Journal folders. You cannot allow access to private items in only one folder.

Click **OK**.

**Note** Messages sent with Send on Behalf permissions include both the delegate's and manager's names next to **From**. When a message is sent with Send As permissions, only the manager's name appears.

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### CHANGE PERMISSIONS FOR YOUR DELEGATE

#### To change permissions for your delegate:

1. Click the **File** tab.
2. Click **Account Settings**, and then click **Delegate Access**.
3. Click the name of the delegate for whom you want to change permissions, and then click **Permissions**.

**Note:** If you want to remove all Delegate Access permissions, do not click **Permissions** but instead click **Remove** and skip the remainder of these steps.

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Change the permissions for any Outlook folder 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.

**Note:** If you want copies of meeting requests and responses that you receive to be sent to a delegate, make sure the delegate is assigned **Editor (can read, create, and modify items)** permission to your **Calendar** folder, and then select the **Delegate receives copies of meeting-related messages sent to me** check box.

### CHANGE DELEGATE ACCESS TO PRIVATE ITEMS

If you have assigned permissions to a delegate so that he or she can access your Outlook folders, you can hide personal information in appointments, meetings, tasks, and contacts by doing the following:

1. Open each personal item
2. On the **Calendar Tools** tab, in the **Tags** group, click **Private**.

If you want to give a delegate access to see your private items, do the following:

1. Click the **File** tab.
2. Click **Account Settings**, and then click **Delegate Access**.
3. Click the name of the delegate for whom you want to change access to your private appointments, and then click **Permissions**.
4. Select the **Delegate can see my private items** check box.

**Important:** You should not rely on the Private feature to prevent other people from accessing the details of your appointments, contacts, or tasks. To make sure that other people cannot read the items that you marked as private, do not grant them **Reviewer (can read items)** permission to your **Calendar**, **Contacts**, or **Tasks** folder.

### REFERENCES

Microsoft Corp. "Outlook Help."

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