

## DELEGATE ACCESS

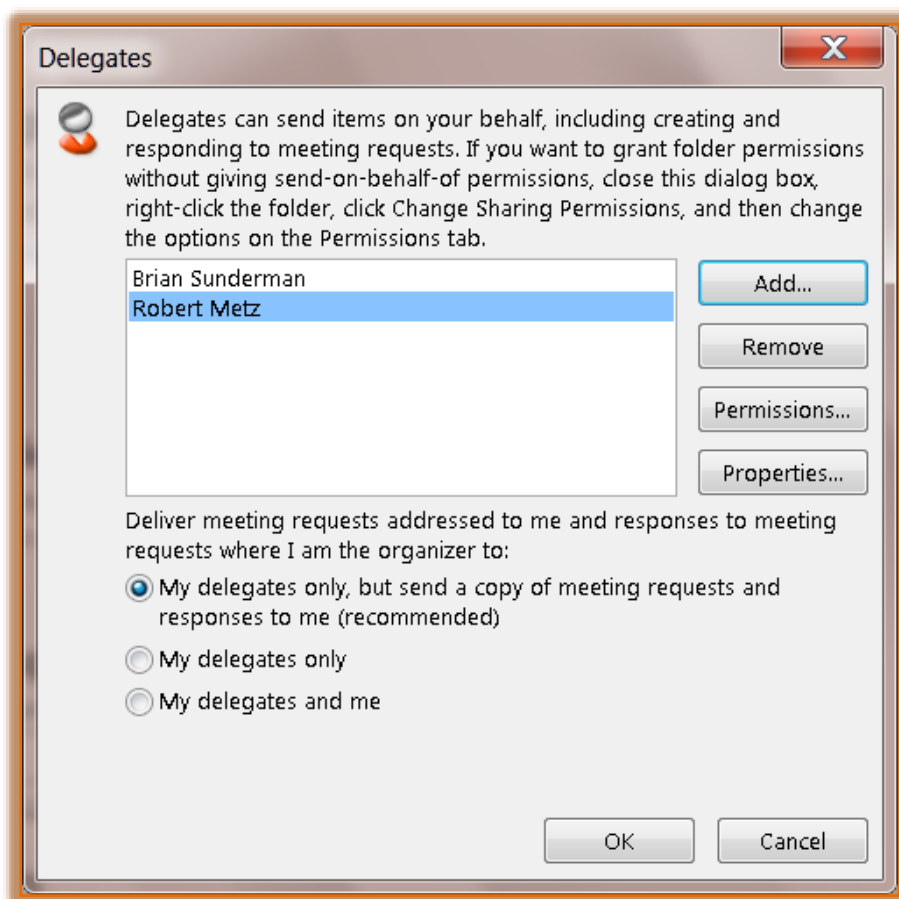
Delegate access enables the user to grant additional permissions, such as allowing a delegate the ability to create e-mail messages or respond to meeting requests on your behalf.

### NOTES:

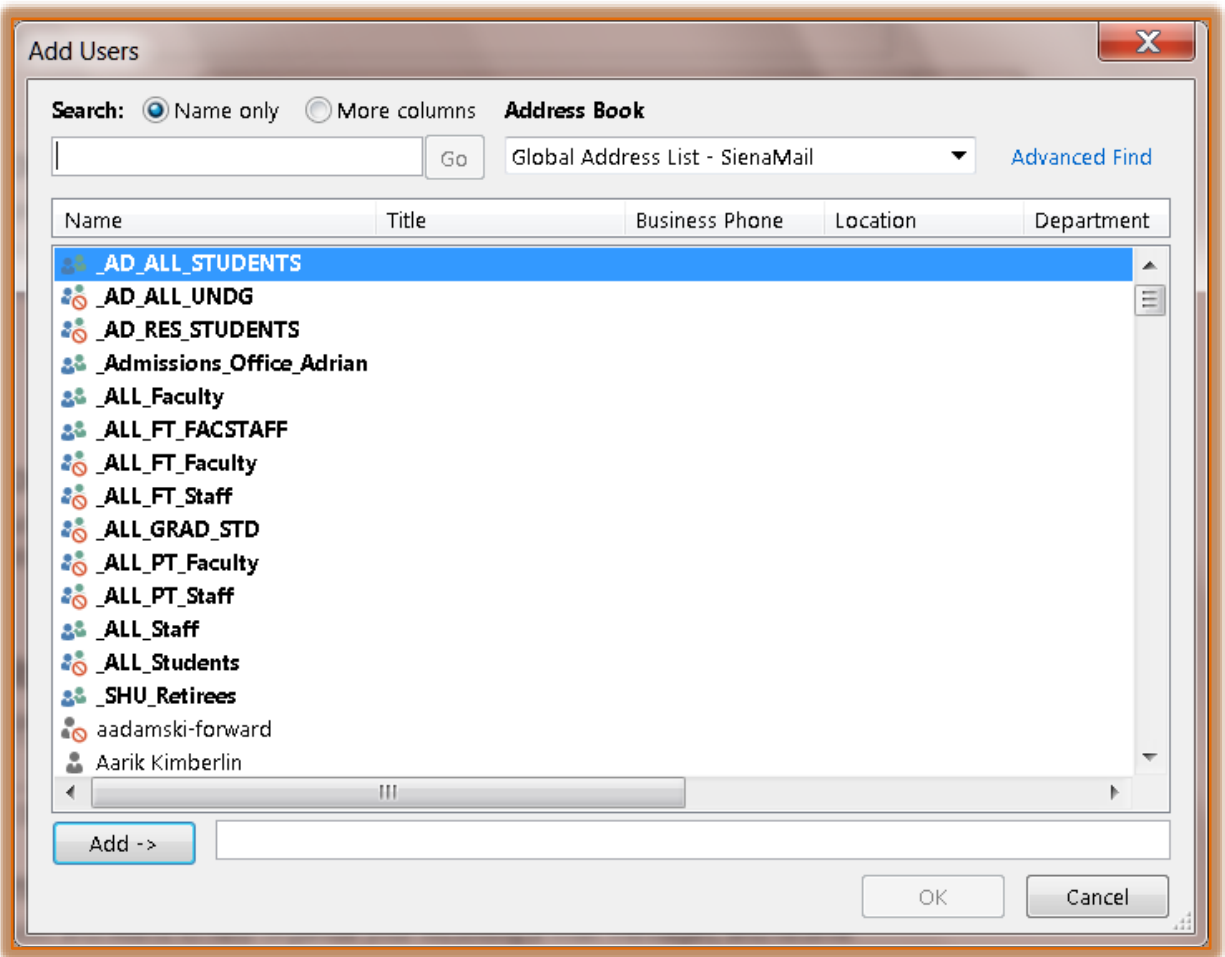
- ✦ In order to delegate your calendar, messages, or tasks both the user and the delegate must be using the same version of Outlook.
- ✦ As the person granting permission, you determine the level of access the delegate has to your folders.
- ✦ Permission can be granted to read items in your folders or to read, create, change, and delete items.
- ✦ The delegate can also be given permission to respond to meeting requests on your behalf.

### DEFINING AND SETTING SHARING PERMISSIONS FOR DELEGATES

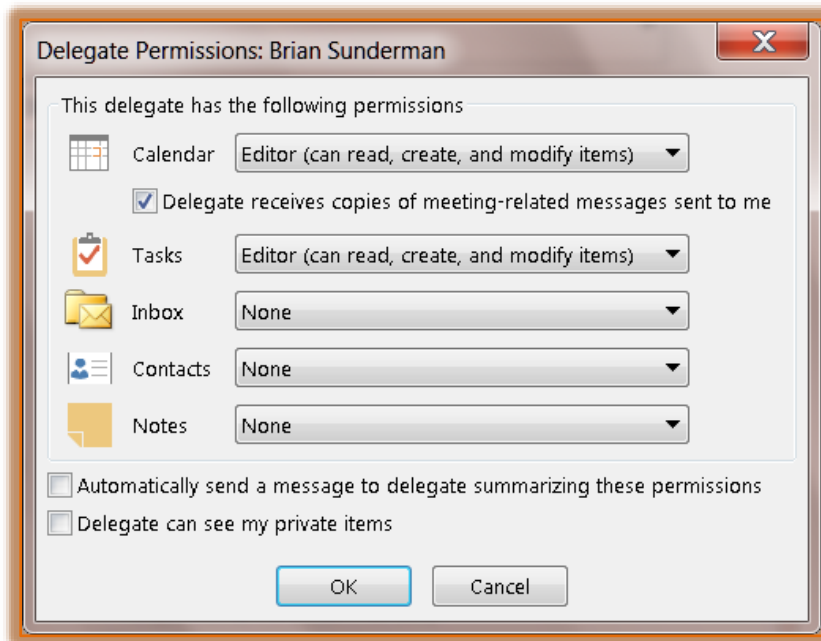
- ✦ Click the **File Tab**.
- ✦ Click the **Info Tab**, if necessary.
- ✦ Click the **Account Settings** button.
- ✦ From the list select **Delegate Access**.
- ✦ The **Delegates** window will display (see illustration below).



- ✦ Click the **Add** button to open the **Add Users** dialog box (see illustration on next page).
- ✦ 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 below).



- ✦ 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 as Private Appointment, 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 **Delegates** 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 the **File Tab**.
- ✦ Click the **Info Tab**, if necessary.
- ✦ Click the **Account Settings** button.
- ✦ From the list select **Delegate Access** to open the **Delegates** dialog box.
- ✦ 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 the **File Tab**.
- ✦ Click the **Info Tab**, if necessary.
- ✦ Click the **Account Settings** button.
- ✦ From the list select **Delegate Access** to open the **Delegates** dialog box.
- ✦ 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 **Delegates** dialog box.

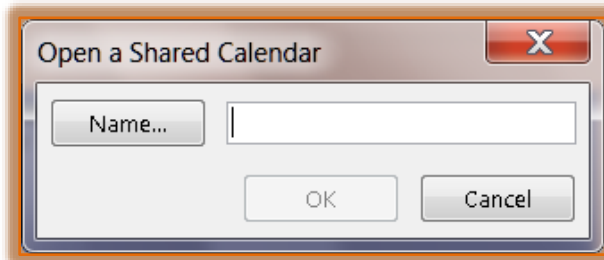
### VIEWING OTHER USER'S CALENDARS

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

- ✦ Click the **Calendar** link in the **Folder Pane**.
- ✦ On the **Home Tab** in the **Manage Calendars Group**, click the **Open Calendar** button (see illustration below).



- ✦ In the list, select **Open Shared Calendar**.
- ✦ The **Open a Shared Folder** dialog box will appear (see illustration below).



- ✦ Click the **Name** button to display the **Select Name** dialog box.
- ✦ Make sure that **Global Address List** 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 **Folder Pane** under **Shared Calendars**.
- ✦ To display the other Calendar, click the check mark next to the **Calendar**.