

# Advanced Delegation & Permissions In Outlook 2007

## What is Delegation?

Delegate access grants another person permission to manage your folders, such as E-mail, Calendar, Contacts, Tasks, Notes, or Journal, on your behalf. Delegates can have Author, Editor, or Reviewer permissions.

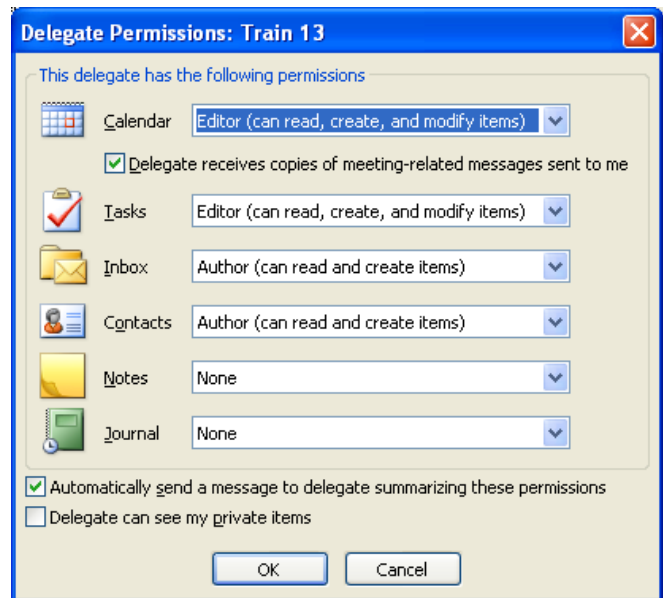
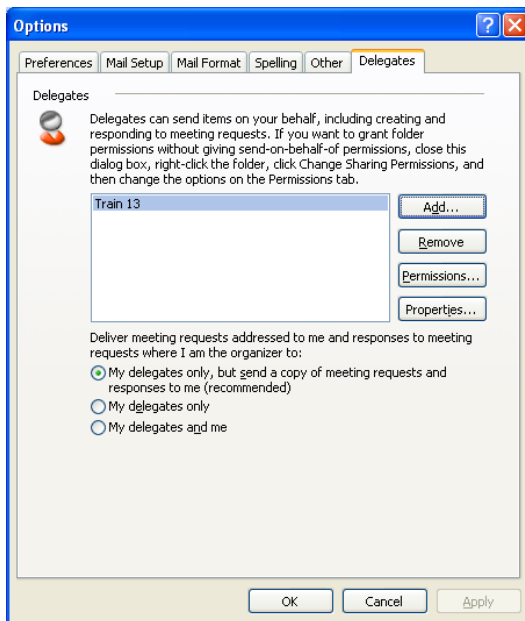
**Author:** With Author permissions, the delegate can read and create items, modify and delete items the delegate creates, and send items on behalf of the owner. For example, a delegate can create task requests and meeting requests directly in the owner's Task or Calendar folder, and then send either item on the owner's behalf.

**Editor:** With Editor permissions, the delegate can do everything the Author permission grants, plus modify and delete items the owner created.

**Reviewer:** With Reviewer permissions, the delegate can read items only.

## How to Grant Delegate Access:

1. On the Tools menu, click **Options**, and click the **Delegates** tab.
2. Click **Add**.
3. Type the name for your delegate or select it by double-clicking from the Name list.
4. Click the **OK** button.
5. When the Delegate Permissions box appears, you can accept the default permissions or set your own. (Do not click **OK** yet.)
6. (Recommended) **Select** the check box in front of **Delegate receives copies of meeting related messages sent to me**.
7. (Recommended) **Select** the check box in front of **Automatically send a message to delegate summarizing these permissions**.
8. (Recommended) **Deselect** the check box in front of **Delegate can see my private items**.
9. Click **OK** once you review this entire window and have selected the appropriate delegate permissions.



## E-Mail Delegation

Delegating e-mail to another person gives that person access to your Inbox and any other e-mail subfolders you designate. Depending on the permissions you select, once you have delegated access to your inbox, your delegate may send e-mail on behalf of you. This last point is the main difference between sharing and delegates. Sharing, which will be discussed later, does not allow the person with whom you have shared your folder the ability to send items on your

behalf.

## Calendar Delegation

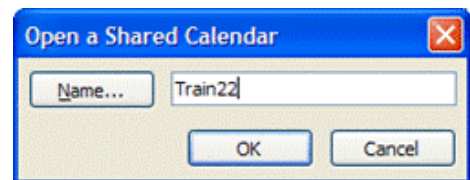
Delegating calendar access gives another person access to your meetings and calendar items so that they may act on your behalf.

### How to Share your Mailbox With a Delegate:

1. On the Go menu, click **Mail**, and **right-click** the mailbox.
2. Choose **Change Sharing Permissions....**
3. On the Permissions tab, click **Add**.
4. Find the name of your delegate and select it by double-clicking on it in the list.
5. Click **OK** to add the name to your permissions list.
6. In the drop-down menu, next to Permission Level, select the desired permission level.

### How to Share Contacts, Calendars and E-mail Folders With a Delegate:

1. In Folder List, right-click the folder you want to share, and click **Sharing**.
2. Click **Add**. Type a username or select one by clicking the **Name...** button, add it, and select the permission level for the folder.



### How to Send Meeting Requests and Responses to a Delegate Instead of Yourself:

1. On the Tools menu, click **Options**, and click the Delegates tab.
2. Select the delegate's name who you want to receive meeting notifications instead of you.
3. Select the check box in front of **Send meeting requests and responses only to my delegates, not to me**.

Note: If the **Send meeting requests and responses only to my delegates, not to me** checkbox is not selected, a delegate must have both Editor (can read, create, and modify items) permissions in a manager's Calendar or Tasks folder and at least Reviewer (can read items) permissions in the manager's Inbox.

### How to Access a Calendar Delegated to You:

1. On the Go menu, click **Calendar**.
2. Click **Open a Shared Calendar** in the Navigation pane. You will see the following window appear.
3. Select the name of the user who granted you delegate permissions and click **OK**.

### How to Setup a Meeting acting as a Delegate for Someone Else:

1. On the Go menu, click **Calendar**.
2. Under People's Calendars, select the check box in front of the user for whom you are setting up the meeting.
3. In the other person's calendar, select the desired time period for the meeting.
4. Right-click the selected area and click **New Meeting Request**.

-Or-

Double click the other person's calendar. When the New Meeting window appears, be sure to set the correct meeting time and day.

5. Add the details for the meeting and type or select the names of the invitees and click **Send**.
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## How to Open and View Another Person's Folder(s) Delegated to You:

1. On the File menu, point to Open, and click **Other User's Folder**.
2. In the Folder Type box, select the folder you would like to open, such as the Inbox.
3. In the Name box, type the name of the person or click the button to select the name from a list.
4. Click **OK** to open the other person's folder.

## How to Add Someone Else's Delegated Mailbox to Your Profile:

If you frequently access another person's inbox, instead of repeating the steps to Open and View Another Person's Folder each time, you should add the other person's mailbox to your profile.

1. On the Tools menu, click **Options**.
2. On the **Mail Setup** tab, click the **E-mail Accounts** button.
3. In the E-mail Accounts list, click once on the name of your account to select it, and then click **Change**.
4. Click **More Settings**, and then click the Advanced tab.
5. Click **Add**, type the mailbox name of the person whose mailbox you want to add, and click **OK**.
6. Click **Next** and click **Finish**, then click **Close**, and finally, click **OK**.
7. On the **Go** menu, click **Folder List**. The other person's mailbox should be visible next to yours.

## Sample Automated Message Received By Delegate Upon Delegation

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