MS Outlook: Setting up Delegation

Before you start…

Should I be using Delegation or Sharing?

Delegation: You should use Outlook's Delegation feature **only** if you need to **hand over** your email and calendaring responsibilities to someone else and would like that person to be able to send email and calendar requests *on your behalf*.

Sharing: If you simply want to share your Outlook Calendar or share one of your Outlook folders with another user, it is not necessary to set up Delegation. Instead, use folder Sharing. By *sharing* your Calendar and/or other Outlook folders, you can, if you choose, give other users permission to create, modify and delete items as well as view items.

For more about sharing, see our guides to working with multiple calendars, and sharing folders.

About Delegation

What is a Delegate?

A **Delegate** is someone – a PA, for example – who has been granted access to another user's Outlook folder(s), allowing them to create items and respond to requests *on the other user's behalf*.

The user granting delegate permission – a manager, for example – determines which folders the delegate can access and also the *level* of access assigned to each Outlook folder.

You can only assign delegate access to your default Outlook folders (Inbox, Calendar, Contacts, Tasks, Notes) – *not to folders that you have created*. To allow a colleague access to a folder you have created, you must use Sharing.

What levels of access Permission can be assigned to a delegate?

You can assign different levels of access to a delegate:

Level	Access Permission granted
None	No access
Author	Your delegate can read and create items, and modify and delete the items they create. For example, a delegate can create task requests and meeting requests directly in your Task or Calendar folder, and then send either item *on your behalf*.
Editor	As above, your delegate can read and create items, and modify and delete the items they create. In addition, they can modify and delete any items that *you* create.
Reviewer	Your delegate can read items. For example a delegate with Reviewer permission can read the messages in your Inbox.

Send on behalf of

With **Author** or **Editor** access, a delegate has *send-on-behalf-of* permission and can send emails on your behalf. Sent messages contain both your name and the delegate's name; message recipients see both names in the message **From** field, e.g. *From: Bloggs, Joe on behalf of Einstein, Albert*.

What next?

— To set up delegate access, see **Section A: Delegate access to another user**. Please ensure you follow all of the steps.

— If you are the delegate, see Section B: When you are the Delegate.

Section A: Delegate access to another user
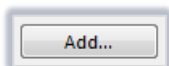
Add a delegate

1. From Outlook's **File** tab, click **Info** on the left of the screen.
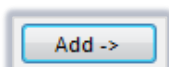

2. Click **Account Settings** and select **Delegate Access** from the list.
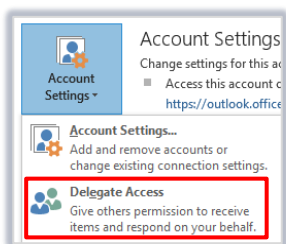
3. In the **Delegates** dialog, click the **Add...** button to add a delegate.


4. Type a name [*Surname, Forename*] in the **Search** field, or select a name from the **Address Book**.

5. Click the **Add ->** button and click **OK** when finished.

Set Delegate Permissions

1. The **Delegate Permissions** dialog opens allowing you grant your delegate permission levels.

2. By default, Outlook gives your delegate **Editor** permissions for your **Calendar** and **Tasks** folders. In addition, the **Delegate receives copies of meeting-related messages sent to me** checkbox is automatically checked.

We recommend you accept these default settings. Although you can, if you wish, assign delegate access to any of your other default Outlook folders (Inbox, Contacts, Notes).
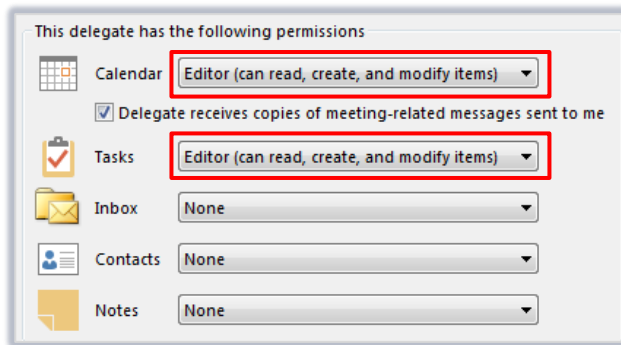

> **Limit the number of delegates who have full access to your Calendar**
>
> Assigning full access (editing and authoring rights) to your Calendar to more than one delegate may cause conflicts.
>
> If more than one user must have access to your Calendar, carefully consider whether these users have to be delegates. You may want to give the user Reviewer permissions instead – see our guide to working with multiple calendars.

3. When you give your delegate access to a folder, they will have access to the items within the folders, *except* items marked private, e.g. a private calendar appointment. If you wish your delegate to be able to access items you specify as private, tick the **Delegate can see my private items** checkbox.

4. Click **OK**.

5. If you want your delegate to be the only person to deal with incoming meeting requests and responses, highlight your delegate's name then check the **My delegates only** checkbox and click **OK.** Meeting requests and responses will then go directly to your delegate's Inbox, not to yours.
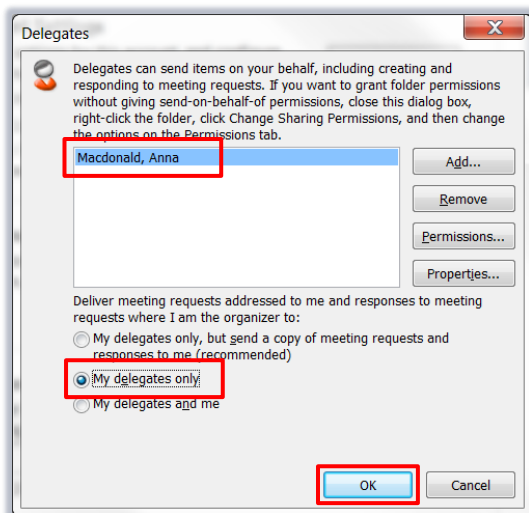

# Inform your delegate of the permission levels you have set for them

1. Click your delegate's name.

2. Click **Permissions…**

3. Tick the **Automatically send a message to delegate summarizing these permissions** checkbox.

4. Click **OK**.

5. Click **OK** to set your delegates permissions and to exit the **Delegates** dialog.

Share your Mailbox

1. In order for your delegate to be able to view your Mailbox and the folders you have assigned them access to from their own account, you must now share your Mailbox.

2. Right-click on your Mailbox and select **Folder Permissions** from the drop-down menu.
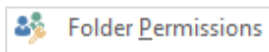
3. From the pop-up dialog, click the **Permissions** tab and then click the **Add...** button.
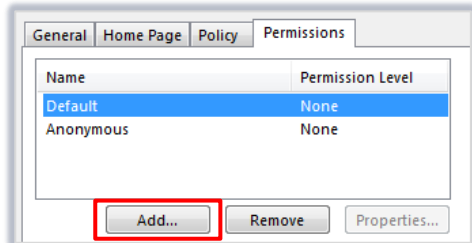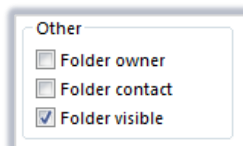

4. In the **Add Users** dialog, type the name of the user you want to share your Mailbox with in the **Search** field, OR select their name from **Address Book.**

5. Click the **Add ->** button, then **OK.**
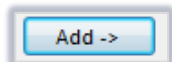
6. The user's name should now appear in the list.

7. Highlight the user's name and select **None** from the dropdown **Permission Level** menu.
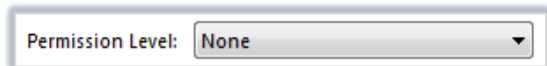


8. Tick the **Folder visible** checkbox.

9. Click **Apply** and then **OK.**

# Section B: When you are the Delegate

To open a permanent connection to another user's folders

As a delegate, you may need frequent access to your manager's folders. You can open a permanent connection to their folders by adding their Mailbox to your Outlook Folder List.

1. From Outlook's **File** tab, select **Info** on the left of the screen.

2. Click **Account Settings** and select **Account Settings...** from the pop-up menu.

3. In the **Account Settings** window, with the **Email** tab foremost, highlight the Microsoft Exchange Account and click **Change...**
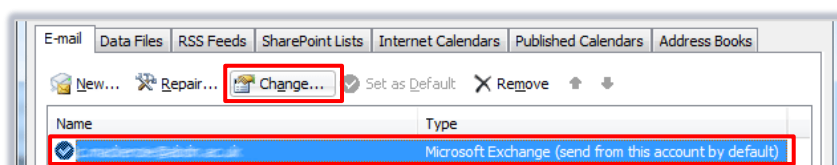
4. In the next window, click **More Settings**…

5. From the ensuing **Microsoft Exchange** pop-up dialog, click the **Advanced** tab, then click **Add…**
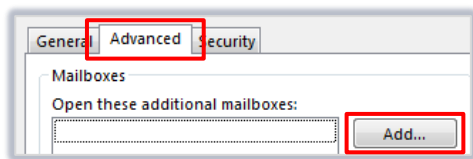
6. In the **Add Mailbox** dialog, type in the name of the user whose Mailbox you wish to view [*Surname, Firstname*], then click **OK.**

7. Alternatively, you can type in the username (e.g. *s99jb7*) of the user, if you know it.

8. Click **Apply**, then **OK**, **Next** and **Finish**.

9. Click the **Folder List** button in the **Navigation Pane**.

    You should now be able to see this user's Mailbox in your own **Folder List** – this will usually be towards the bottom of your folder list.

    Viewing other folders: By clicking on the **+** symbol next to their Mailbox you will see a list of any other Outlook folders you have been granted access to, e.g. Calendar or Contacts.

To open a temporary connection to another user's folders

This method allows you to open one of the other user's primary Mailbox folders (Calendar, Contacts, Inbox, Notes, or Tasks) in a separate window that will not reappear the next time you start Outlook.

1. From Outlook's **File** tab, select **Open & Export** > **Other User's Folder**.
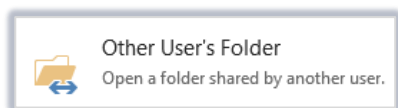
2. In the **Open Other User's Folder** dialog, type in the name of the user whose folder you wish to view [*Surname, Firstname*]

    OR click the **Name…** button to search or to select their name from the Address Book, then click **OK**.

3. Select the **Folder type** from the drop down list, e.g. Inbox, Calendar.

4. Click **OK**.

    Note that if you have not been granted the required Permissions to access this user's folder, your access will be denied. Contact the user if you think you should have permissions.

5. The selected folder will open in your main **Viewing Pane** (use the Navigation Pane to return to any of your own folders).

Further Information and Help

– Use MyIT to log calls with the IT Service Desk: myit.abdn.ac.uk