



Delegating Access and Managing Another Person's Mail / Calendar with Outlook

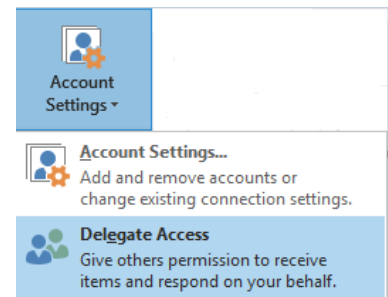
Occasionally, it may be beneficial to allow (delegate) another person to assist with managing your calendar and/or mail. (This is different from folder sharing, which does not include permissions for others to act on your behalf.) Both the mailbox owner and delegate must complete the appropriate instructions below to accomplish this task.

The mailbox owner and the delegate must both use the same version of Outlook. These instructions are for the Outlook client. We recommend using the Outlook client (desktop) program for these activities rather than the Outlook 365 online version (also called Outlook Web Access or OWA).

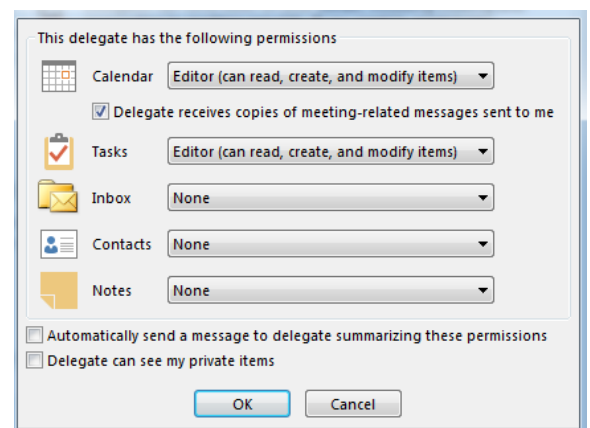
Step 1: Mailbox Owner Instructions

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.

1. Click the **File** tab.
2. Click **Account Settings**, and then click **Delegate Access**.
3. Click **Add**.
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.
5. Click **Add**, and then click **OK**.
6. In the **Delegate Permissions** dialog box, 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, such as **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.
- 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.

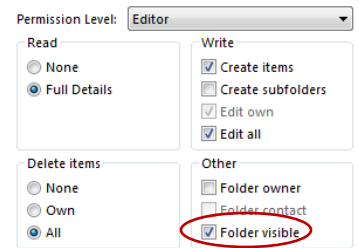


7. To send a message to notify the delegate of the changed permissions, select the **Automatically send a message to delegate summarizing these permissions** check box.
8. If you want, select the **Delegate can see my private items** check box. This setting affects all Exchange folders. This includes all Mail, Contacts, Calendar, Tasks, Notes, and Journal folders. There is no way to grant access to private items in only specified folders.
9. Click **OK**.

10. **[OPTIONAL] Granting access to E-Mail:** Only complete this step if you wish to **provide access to email** (in addition to calendar).

Grant Folder Visible Access on your **Root Folder** and on your **Inbox folder**:

- Right-click the **root folder** of your Exchange mailbox (the folder with your name on it), and click **Folder Permissions**. (If Permissions is not listed, choose Properties, and then click on the Permissions tab).
- Click the name of the delegate. If the name is not listed, review steps 1-9 and provide **Inbox** access.
- Under **Permissions**, under **Other**, select the **Folder visible** check box.
- Click **OK**.
- Repeat** steps a – d on your **Inbox** folder.



Any folders you would like someone else to have access to must be moved into your Inbox folder. Move the folder(s) into your **Inbox** and then check the permissions on each folder to make sure the person has the appropriate access (right-click on the name of the folder, choose Properties, and then click the Permissions tab).

Step 2: Delegate Instructions

After the Mailbox Owner has granted the appropriate permissions, the Delegate can then access the Mailbox Owner's calendar and/or mailbox.

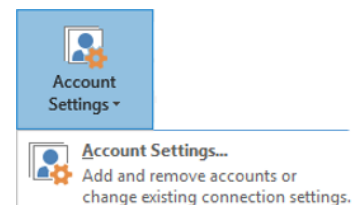
To Access the Calendar:

- Click on the **Calendar icon** (or the word **Calendar**) (in the lower left corner of the window).
- Right-click on **Other Calendars** and choose **Add Calendar > From Address Book**. Search for the mailbox owner's name and select it. Click **Calendar**, and then click **OK**.
- The mailbox owner's calendar should now be listed under Other Calendars. Click the checkbox in front of the name to view or hide the calendar.



To Access the Mailbox:

- Click **File > Account Settings > Account Settings**.
- On the **Email** tab, select your Exchange account (listed under Name), click **Change**, and then click **More Settings**.
- On the **Advanced** tab, under *Open these additional mailboxes*, click **Add**, and then enter the mailbox name of the person whose mailbox you wish to add to your user profile. **The mailbox name is in the form of an email address and must be typed in exactly.** If you do not know the mailbox name, ask the person who granted you access. It is displayed in the title bar at the top of the window when the mailbox owner opens their email using the Outlook Client. It can also be found by clicking on their profile icon in Outlook 365.
- Click **OK**, then **Next**, and then **Finish**, and close the Account Settings window. The mailbox owner's email should appear in the Folder Pane beneath your Exchange mailbox folders. If the mailbox or Inbox does not appear right away, allow up to 5 minutes processing time and then close and reopen Outlook.
- The only folder that may be viewed by a Delegate is the Inbox.** Any additional folders the owner wishes to provide access to must be moved into the Inbox (see step 10 of Mailbox Owner Instructions, above).



NOTE: While it is possible to view another person's mail folders using **Outlook 365 (OWA)**, you must use the Outlook Client (desktop program) to send mail on their behalf. In Outlook 365, a mailbox someone has shared with you can be viewed by right-clicking on your mailbox's root folder (the one with your name on it) and choosing 'Add shared folder'.

The instructions in this document are supported by the Division of Technology Services. Additional related information is also provided by Microsoft support:

- [Add and manage delegates in Outlook for Mac](#)
- [Manage another person's mail and calendar items](#)
- [Become a delegate or stop being a delegate in Outlook for Mac](#)
- [Manage someone else's calendar in Outlook Web App](#)
- [Calendar delegation in Outlook Web App](#)
- [Sharing your calendar in Outlook Web App](#)