

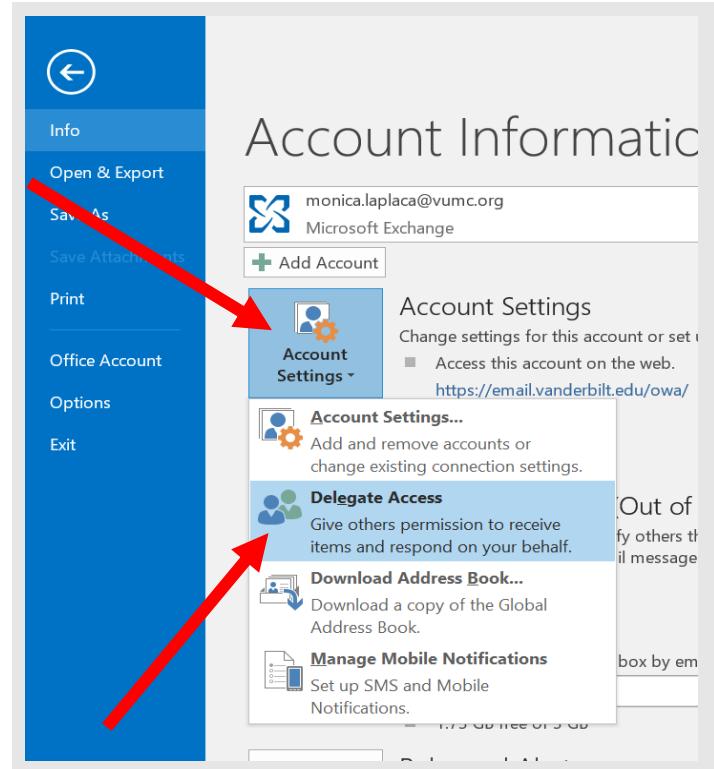
Delegating Access & Managing Another Person's Mail/Calendar with Outlook

VANDERBILT  UNIVERSITY
MEDICAL CENTER

Information Technology

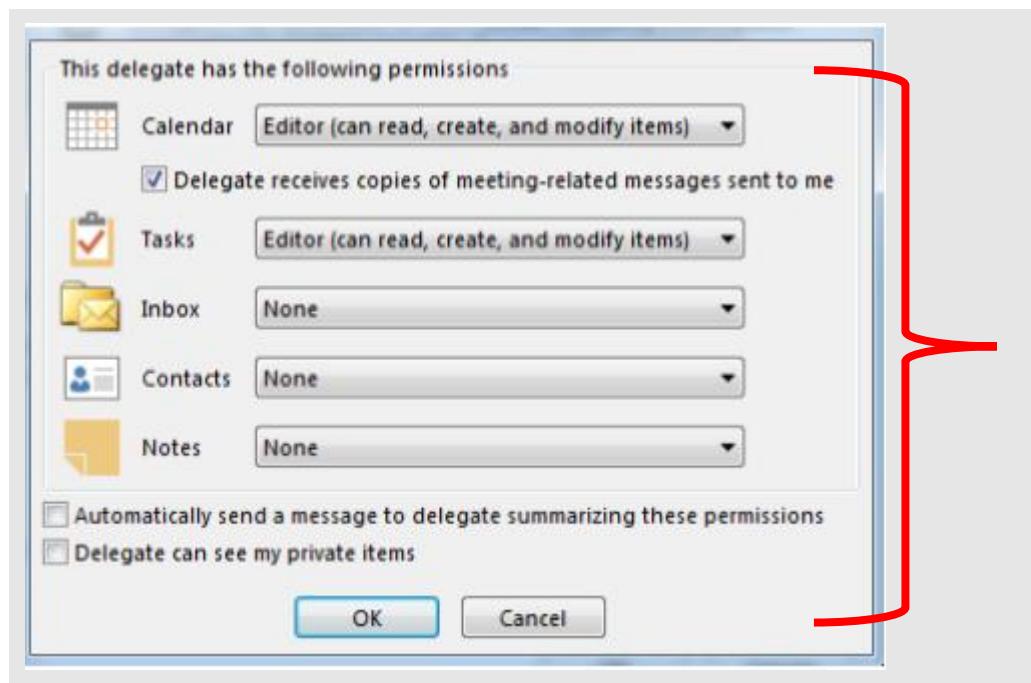
Mailbox Owner Instructions

1. Click the **File** tab
2. Click **Account Settings**, and then click **Delegate Access**
3. Click **Add**
4. Type the name of your desired delegate **or** search for and then click the name in the search results list
5. Click **Add**, and then click **OK**



Mailbox Owner Instructions

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



Mailbox Owner Instructions

6.A 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.

6.B 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.

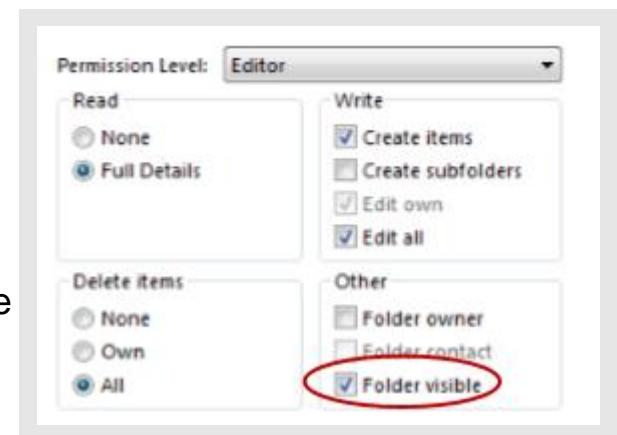
Mailbox Owner Instructions

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**

Mailbox Owner Instructions

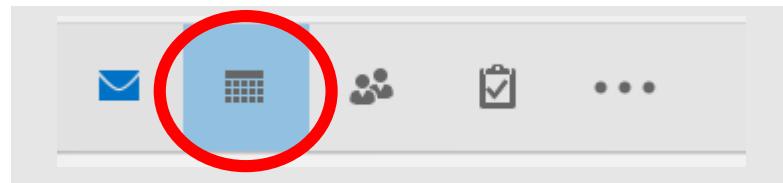
10. [OPTIONAL] Granting access to E-Mail (access to email in addition to calendar)
 - a. Right-click the root folder of your Exchange mailbox (the **folder with your name** on it), and click **Folder Permissions**. (If Permissions is not listed, choose Properties, and then click on the Permissions tab).
 - b. Click **name of the delegate**. If the name is not listed, review steps 1-9 and provide Inbox access.
 - c. Under Permissions, under Other, select the **Folder visible** check box
 - d. Click **OK**
 - e. 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).



Delegate Instructions

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



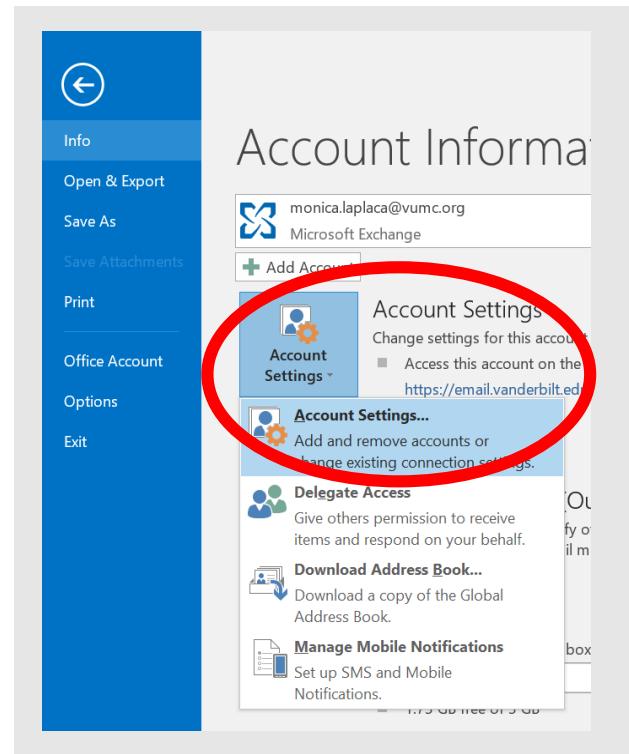
To access the Calendar:

1. Click on the **Calendar icon** (in the lower left corner of the window)
2. 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**
3. 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

Delegate Instructions

To access the Mailbox:

1. Click **File > Account Settings > Account Settings**
2. On the Email tab, select your **Exchange account** (listed under Name), click **Change**, and then click **More Settings**
3. 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.



Delegate Instructions

To access the Mailbox:

4. 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
5. **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).