Delegate access is typically used when an assistant will be managing the inbox and calendar of the person they are assisting. The delegate can reply to emails and meetings on behalf of the person as well as propose meetings and send emails. This guide covers setting up and using delegate access.

### 1.1 Granting Delegate Access to your Inbox & Calendar (Performed by Calendar Owner)

The instructions in this section are carried out by the owner of the Outlook account and allow an assistant to manage the owner's calendar and inbox.

1. Log in to the client version of Outlook.
2. Click the “File” tab.
3. Click “Info” from the left menu.
4. Click “Account Settings” then “Delegate Access”.
5. In the Delegates window, click the “Add” button.

6. In the Add Users window, type the name of the person you wish to make a delegate and click “Go”.
7. Click the delegate from the list and click “Add”.
8. Click “OK”.

The Delegate Permissions window should appear.

9. Use the drop downs to make the delegate an "Editor" in the desired areas of Outlook.
10. Check "Delegate received copies of meeting-related messages send to me".
12. Check "Automatically send a message to ...".
13. Click "OK".
14. Select the delegate then check "My delegates only, but send a copy of meeting requests and responses to me (recommended)".
15. Click "OK".

The person you have made a delegate will receive an email message informing them of your actions and receive a copy of all meeting requests sent to you.
2.1 Managing a Calendar you are a Delegate of
When someone makes you a delegate of their calendar, you will receive the email to the right informing you. You will now be able to:

- View and Edit their Calendar.
- Receive their Meeting Invitations and Respond for them.
- Send Meeting Invitations.
- Send emails on their behalf and view their inbox.

Viewing the Calendar you are a Delegate of
To view the owner’s calendar, you must add it to your calendars.

1. In the client version of Outlook, display calendars (Control + 2).
2. From the menu, click the "File" tab.
3. Click "Open & Export".
4. Click "Other Users Folder".
5. Use the "Name" button to locate the person who made you a delegate to their calendar.
6. Verify "Folder Type" is set to "Calendar" then click "OK".

The calendar will appear while in Calendar view (Control + 2) under "Shared Calendars". To view the shared calendar, check its box. To hide it, uncheck its box.
2.2 Responding to a Meeting Request for a Calendar you are the Delegate of

If delegate access was setup as shown, the calendar's delegate should get a copy of the meeting requests and can answer them for the calendar's owner. Delegates should follow the steps in this section to respond for the calendar's owner.

1. In the client version of Outlook, open your Inbox.
2. Double click the meeting request to open it.
3. Use these buttons to respond to the meeting request.

The person who was invited to the meeting (and you are responding for) will appear here.

You can view the calendar by clicking this button or in the view below.

The response received by the meeting organizer will appear as below using “on behalf of”.

Wilmeth, Wayne on behalf of Vossler, Patrick
Accepted Meeting
When Friday, December 13, 2013 3:30 PM—4:00 PM
Location hoh 300
2.3 Sending Email on Behalf of another Person (Acting as a Delegate)

This section covers how to send an email on behalf of another person. Note that the owner of the email account must have given you permission to do this by making you a Reviewer, Editor or Author as shown in this guide. These steps below are performed by the delegate. For example, Jim is sending out an email on behalf of Tina so Jim performs the steps below from his Outlook account.

1. Log in to the client version of Outlook using your Marshall log in credentials.
2. Start a new mail message (“Home” tab – “New Email” button).
3. If the “From” line is not available, click the “Options” tab and then the “From” button.
4. Click the “From” drop down and select “Other E-mail Address...”.
   Note that after doing steps 5 and 6 once, the address will be more readily available the next time you use it.
5. Either type or use the From search button place the person you are sending on behalf of in the Send From Other E-mail Address box.
6. Click “OK”.

The email address of the person you are sending on behalf of should now be listed on the “From” line.

About Sent Items
By default, Outlook automatically stores a copy of the email in the account of the person who created the email (i.e. the delegate), not the person you are sending on behalf of. If you wish the person you are sending on behalf of to receive a copy, you should include them in the email on either the To, CC, or BCC line.

Controlling Where Replies Go
By default, replies to the email will be sent to the person sending the email (the delegate) rather than the person they are sending on behalf of. If you would like replies to go to the person you are sending on behalf of, follow these steps:

a. From within the E-mail compose window, click the “Options” tab.
b. Click the “Direct Replies To” button.
c. Check “Have replies sent to” and specify the reply recipient(s).
d. Click “OK”.

7. Compose and send the email as usual.
2.4 Viewing the Inbox You Are a Delegate Of

This section covers how to view the contents of someone else’s Inbox. Assuming the owner of the Inbox has granted you permission to view it, follow the steps below to display their inbox on your folder list.

1. Open the client version of Outlook.
2. Click the “File” tab.
3. Click “Info” from the left menu.
4. Click “Account Settings” then “Account Settings…” again from the drop down list.
5. Click the “E-mail” tab.

6. Click your account from the name list.
7. Click the “Change” button.
8. Click the “More Settings” button located in the lower right corner of the Change Account window.

9. Click the “Advanced” tab.
10. Click the “Add” button.
11. Type the username for the person whose Inbox folder you wish to display and click “OK”.

12. Click “OK” to close the More Settings area.
13. Click “Next”, “Finish”, then “Close”.

The person’s Inbox should now appear on your folder list and will remain there unless you go through the steps above and remove it from the additional mail boxes to open list.
3.1 Removing a Delegate's Access to your Calendar and Inbox

Should you wish a delegate to no longer have access to your inbox and calendar, follow the steps in this section.

1. Log in to the client version of Outlook.
2. Click the “File” tab.
3. Click “Info” from the left menu.
4. Click “Account Settings” then “Delegate Access”.

5. Select their name then click "Remove".
6. Click "OK".

Note that if you just wish to change their level of permissions, select their name and then click "Permissions".