Outlook Sharing and Delegation

Sharing
Sharing grants specific individuals the ability to work collaboratively with you in having various levels of access to resources within your account that you specify. This can be items such as email folders, contacts, and calendars.

Sharing Folders

Sharing Mail Folders
Folder permissions are very explicit – you must grant Folder Visible permission at the uppermost folder of the mailbox (i.e., the account name) and then additional permission for any subfolders that you want your members to control.

To grant Folder Visible permission,
1. Right-click the root folder of the Exchange mailbox (the top-level folder with the name of the account), then click Folder Permissions. If “Folder Permissions” is not available, click Data File Properties.
2. In the Permission tab, click the name of the delegate. You may need to Add the delegate first.
3. Under permissions, under Other, select the Folder Visible check box. All other

NOTE: This process grants users access to the top level of the account, but not to anything within the account. To be able to see anything within the account, access needs to be granted to Inbox, Cabinet, and each folder/subfolder. Continue on to the next section to see how to do this for each area and parent to which the other individual needs access.

To grant further access,
1. In the Folder Pane, right-click the folder that you wish to share. From the shortcut menu, select Properties.
2. In the Permissions tab, select the name of a user in the list of add a new user or group by clicking the Add button.
3. Use the Permission level pull-down to select an appropriate permission level. The list of levels descends from highest (Owner) to lowest (None).
4. After choosing a Permission Level, you can further adjust the settings by selecting buttons or checking and unchecking boxes in the rest of the Permissions section. You can set different permission levels for each person or group that you select.

Sharing Calendars

Sharing Calendars
1. Click Calendar in the Navigation bar.
2. Click Home > Share Calendar.
3. In the email that opens, type the name of the person in your organization that you want to share your calendar with in the To box. In Details, specify the level of details that you want to share with the person in your organization, and then click Send.
4. The person in your organization receives the sharing invitation in the email, and then clicks Open this Calendar. (test this)

**Accessing Shared Calendars**
1. In the Calendar panel of Outlook, go to the Home ribbon and click on the Open Calendar command in the Manage Calendars group.
2. From the menu, select Open Shared Calendar...
3. In the Open a Shared Calendar Name box, type a name or user id and click OK.

**Sharing Contacts**

**Sharing Contacts**
1. In People, in the Folder Pane, click the contact folder that you want to share with a person in your organization.
2. Click Home. Then, in the Share group, click Share Contacts.
3. In the To box, enter the name of the recipient for the sharing invitation message. You may also change the subject if you want to.
4. Also, if you want, you can request permission to view the recipient’s default People folder. To do so, select the Request permission to view recipient’s Contacts folder check box.
5. In the message body, type any information that you want to include, and then click Send. Review the confirmation dialog box, and then if correct, click OK.

6. The person in your organization receives the sharing invitation in the email, and clicks Open this Contacts folder.

**Accessing Shared Contacts**
1. Click People.
2. Click Home. In the Share Group, click Open Shared Contacts. Look for this icon: 📞

**Delegation**
Delegation allows another specified individual to act on your behalf. Use of this functionality should be done with caution as your delegates take actions with your email and calendar as if you were doing so.

**Grant Delegate Access**
1. Click the File tab.
2. Click Account Settings > Delegate Access > Add.
3. 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.
4. Click Add > OK.
5. In the Delegate permissions dialog box, accept the default permission settings or select custom access levels for Exchange folders.

6. 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.
7. If you want, select the Delegate can see my private items check box.
8. Click OK.

**Change Delegate Access**
1. Click the File tab > Account Settings > Delegate Access.
2. Click the name of the delegate for whom you want to change permissions and then click Permissions.
3. Change the permissions for any Outlook folder that the delegate has access to.

**Responding to Meeting Requests for Another Person**
1. Open the other person’s Inbox if his or her meeting requests are not sent to you directly.
2. Open the meeting request and click either Accept, Tentative, or Decline.
3. To send a meeting request for another person,
   1. Open the other person’s calendar.
   2. On the Home tab, in the New group, click New Meeting.
   3. Enter the necessary information as you ordinarily do.
Create/Respond to an Email on Behalf of Another

1. In Mail, click Home > New Email.
2. On the Options tab, in the Show Fields group, click From.
3. In the From box, type the name of the person on whose behalf you are sending the message.
4. Add recipients, a subject, and the contents of the message as you typically do, and then Send.

To reply on behalf of another,

1. In the other person’s mailbox, select the message that you want to reply to.
2. Click Home > Reply > Reply All or Forward.
3. On the Options tab, in the Show fields group, click From.
4. In the From box, type your manager’s name. To select the name from a list in the Address Book, click From.
5. Add the necessary information as you typically do then Send.