Delegating permissions in Outlook

A delegate can create meetings and respond to meeting invitations on your behalf. You may also allow a delegate to have access to your Email.

You can also delegate permissions to your Exchange mail, address book contacts, tasks, notes, and journal in pretty much the same way. Email permissions will require an extra step, as detailed in step 6 below.

Adding a Delegate

This guide is provided on the basis of Outlook 2003. While some instructions might differ in Outlook 2007, the functionality has been tested to work.

1. Under the Tools menu, select Options…

2. In the Options dialog box, click the Delegates tab, then click the Add… button to bring up the Add Users dialog.

3. Type a name to search for the person you want to make your delegate. Select their name in ‘Name’ list, click Add, then click OK.
4. Select the permissions you wish the delegate to have in the pull down menu next to Calendar. The types of delegate are described below. Editor is the most commonly used type.

'Delegate receives copies of meeting-related messages' is automatically checked. If you do not want your delegate to receive meeting emails sent to you, uncheck this box.

If you check the 'Delegate can see my private items' tick box in this dialog, the delegate in question will be able you’re your ‘Private’ items.

5. Click OK to apply the changes.

6. If you are giving delegate access to your Email:

   Right click on your mailbox and select Sharing.

7. Click Add to select your delegate from the Address book.

   Once the delegate is listed you can select various permission levels, or customise the permissions you’d like to assign to the delegate.

   See Microsoft Outlook Help for details about the various levels of permissions.

   When satisfied with the permissions assigned, click OK.
How others will see email from a delegate

When a message is sent by your delegate, the ‘From’ field will show
From: ‘<Delegate> on behalf of <owner>’. Example: ‘Smith John on behalf of Doe Jane’.
This appears only when the recipient opens it but does not appear in the ‘From’ field in the
Inbox message list. The Inbox list entry shows the message as coming from the Owner.

Common types of permissions

These are two most common types of permissions assigned:

- **Reviewer** - A reviewer can view your calendar, but cannot make any changes to
  it. All staff have reviewer permissions by default.
- **Editor** - An editor can make changes to your calendar. When you make someone
  an editor, you can decide to have that person receive meeting-related emails sent
  to you. An editor can create meetings on your behalf; an editor can also accept
  and decline meeting requests on your behalf.

The difference between delegates and sharing

If you make someone an editor delegate, you can make that person receive meeting-related
emails sent to you. When someone invites you to a meeting, both you and your delegate
receive the email invite. Your delegate can then accept or decline the meeting on your behalf.

If you just share your calendar with someone (even if you make that person an editor), he or
she will not receive meeting-related emails sent to you. You can allow that person to create
meetings on your behalf and make other changes to your calendar, but you are responsible
for accepting and declining your own meeting requests.

If you want to share your calendar with someone, but do not want to make them a delegate,
refer to the following article:

- “Sharing your calendar in Outlook”