

UVM Knowledge Base

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Delegate Access

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Microsoft Exchange and Outlook allow you to grant another person, known as a delegate, permission to receive and respond to meeting requests or to send e-mail messages on your behalf. You can also grant **additional permissions** that allow your delegate to read, create, and delete items in your mailbox. You can also grant your delegate full control over items in your Exchange mailbox.

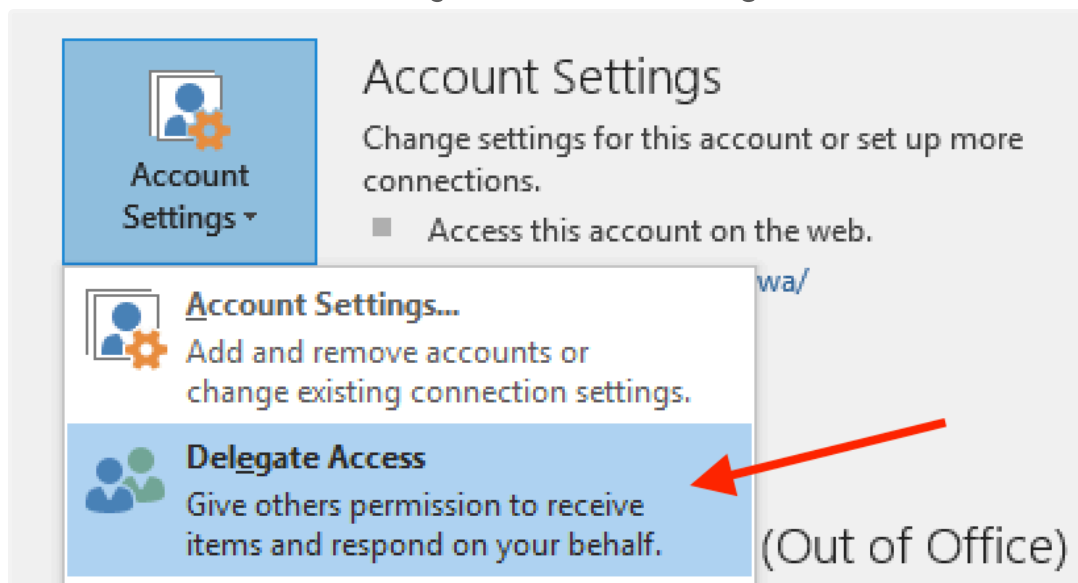
Be careful when granting delegate access to your Exchange Account.

Delegates will have the ability to send mail, create meetings, and respond to meeting invites on your behalf. You should understand the level of access you are granting.

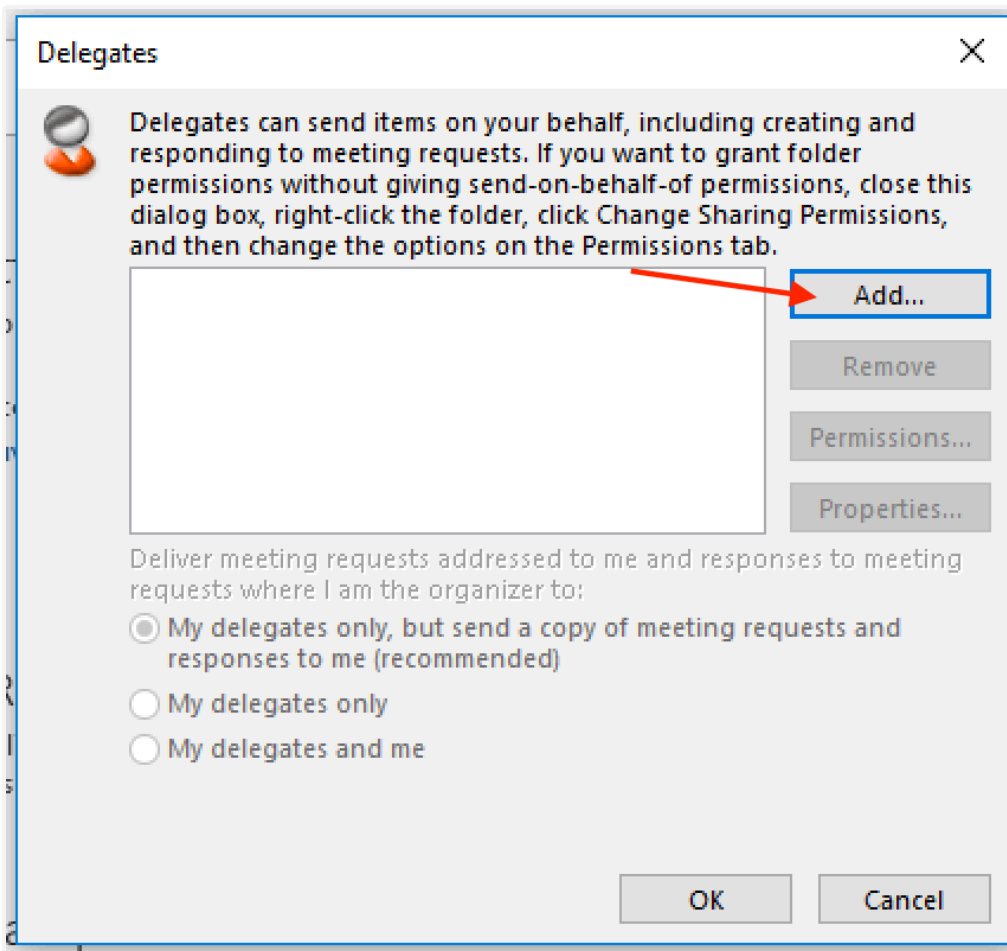
Adding Delegate Permissions

Outlook (Windows)

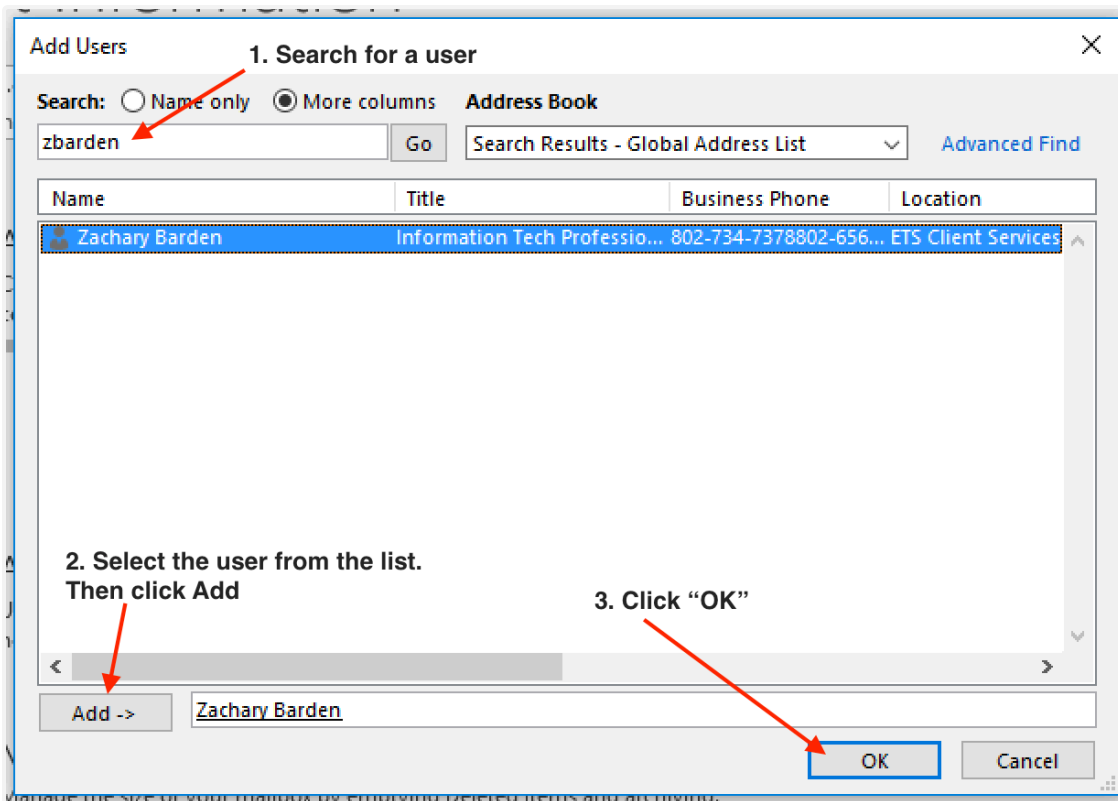
1. Open the **Microsoft Outlook** application.
2. Click the **"File"** menu in the top left corner of the Outlook window. Under the **"Info"** tab, click on "Account Settings" then select **"Delegate Access."**



3. The **"Delegates"** window will appear. Click **"Add"** to add a delegate to your account.



4. Use the “**Search**” field to find the user you’d like to add as a delegate. If you are searching by NetID, make sure to check the “**More Columns**” option. Select the user you wish to add as a delegate from the search results, then click the “**Add**” button. Click “**OK**” to continue.



5. The “Delegate Permissions” window is where you configure the specific permissions your delegate will have.

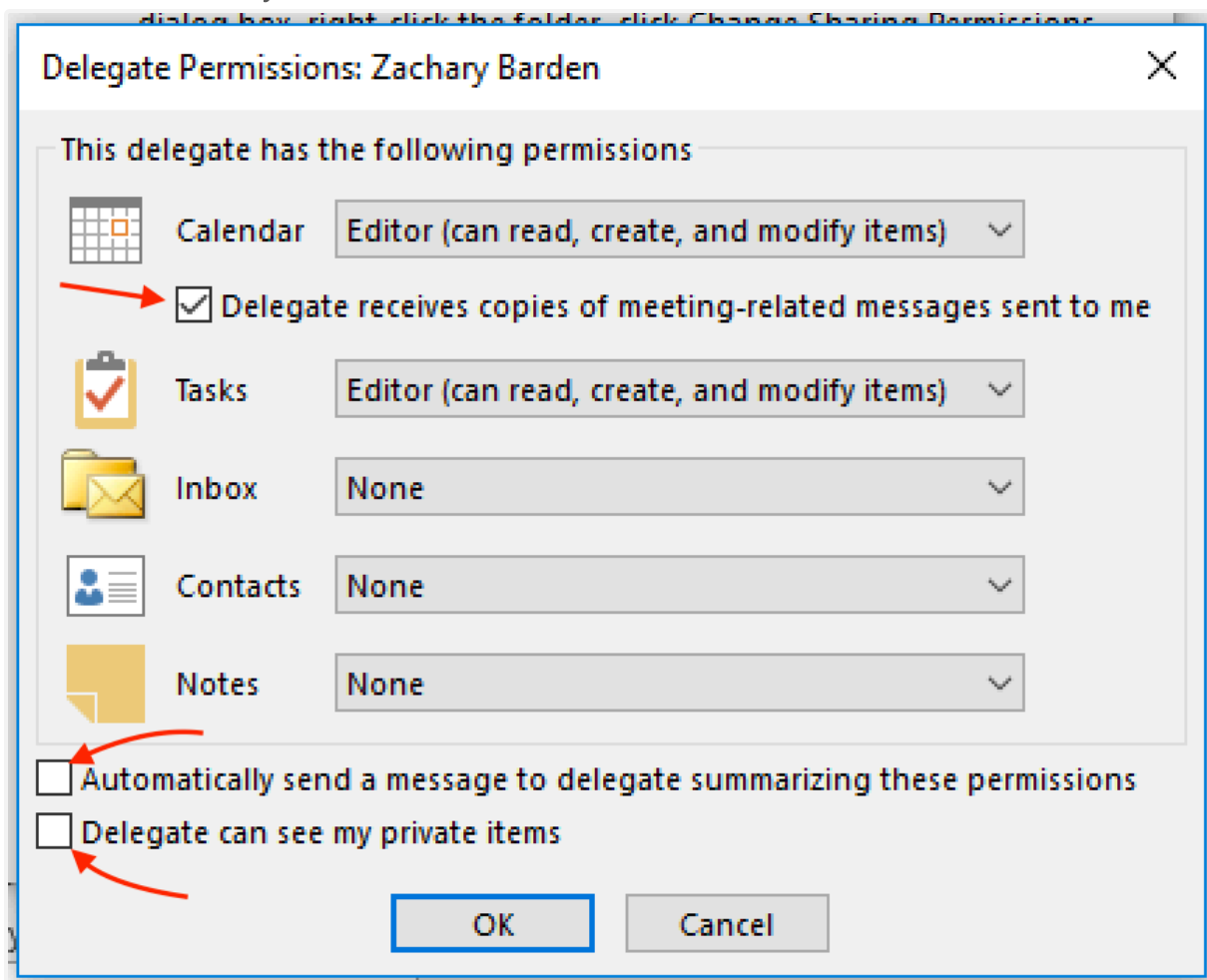
- Delegate permissions can be set for Calendar, Tasks, Inbox, Contacts, and Notes. Most delegates will only need Calendar access.

NOTE:

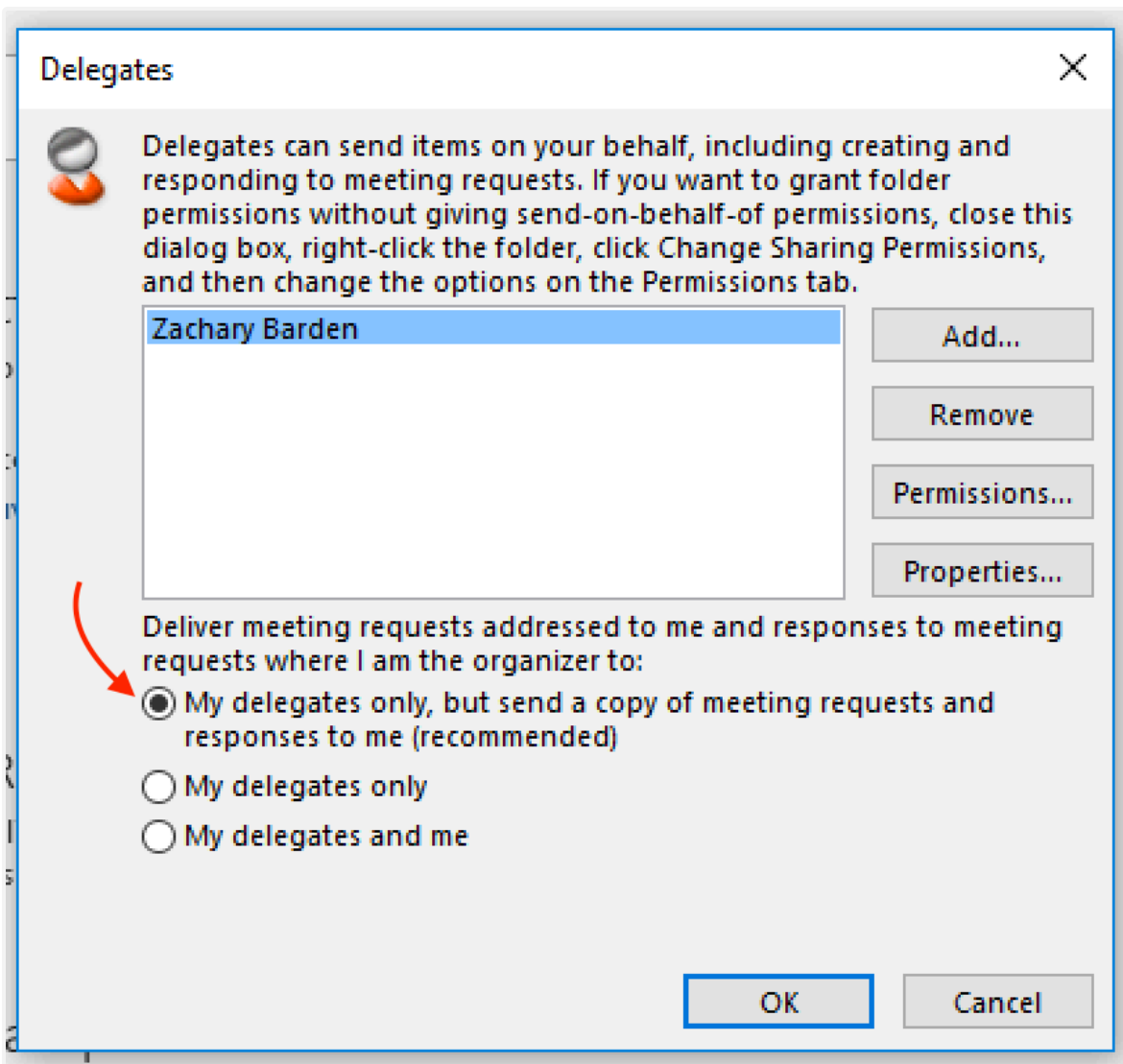
Granting access to your inbox will allow your delegate to read your email messages.

- There are four Delegate permissions levels: Editor, Author, Reviewer, and None. We recommend using default Editor permission. If you think your circumstances require a different configuration, please contact the UVM Tech Team so we can discuss the proper setup.
- If your delegate will be managing your calendar for you, you’ll want to check the **“Delegate receives copies of meeting-related messages sent to me”** checkbox. This checkbox will send your meeting request to the delegate. The delegate can then decide to accept, decline, or ask for the meeting to be scheduled at a

different time on your behalf.



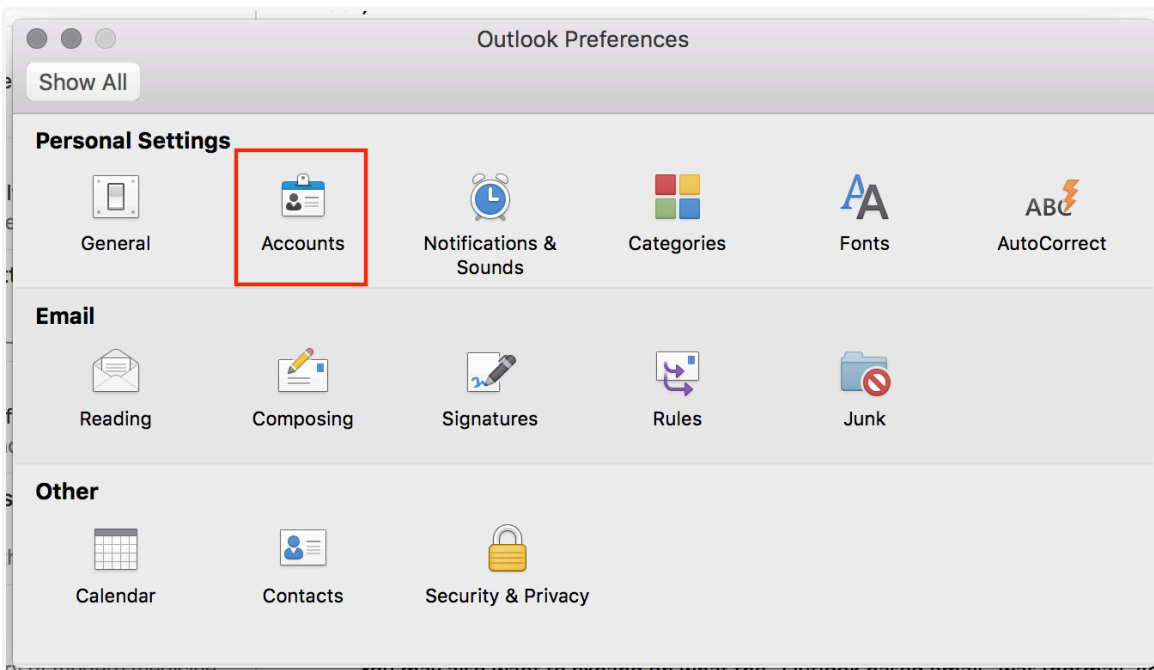
6. Once you've added a delegate to your account, you'll be able to choose how you would like to handle your meeting related emails. We recommend sending meeting invites to your delegate, but also choosing to receive a copy yourself.



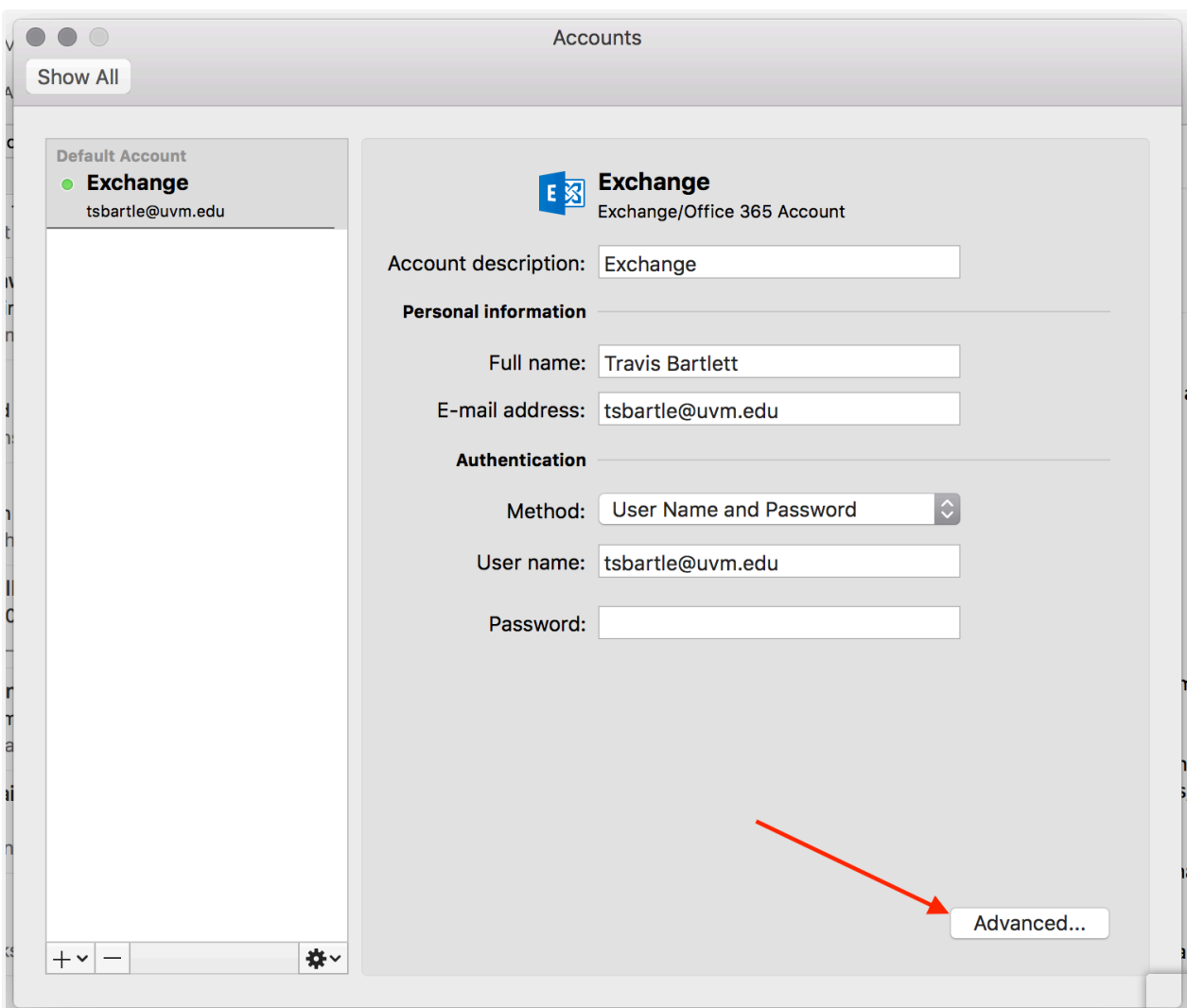
That's it. You've successfully granted Delegate Permissions to another user.

Outlook (macOS)

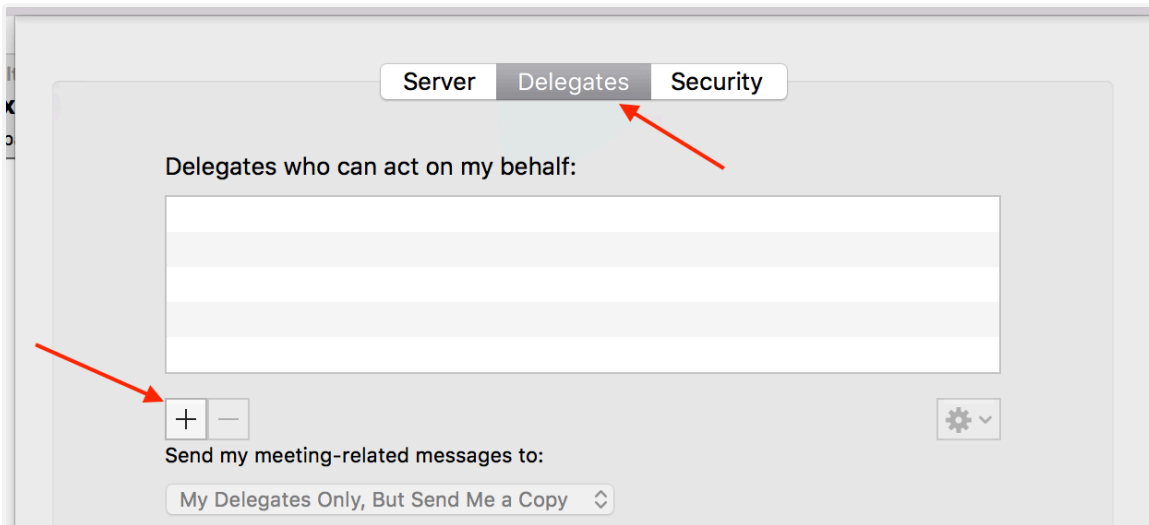
1. Open the **Microsoft Outlook** application.
2. Click the **"Outlook"** menu in the top left corner of your screen, then click on **"Preferences"**. From the preferences window, click on **"Accounts."**



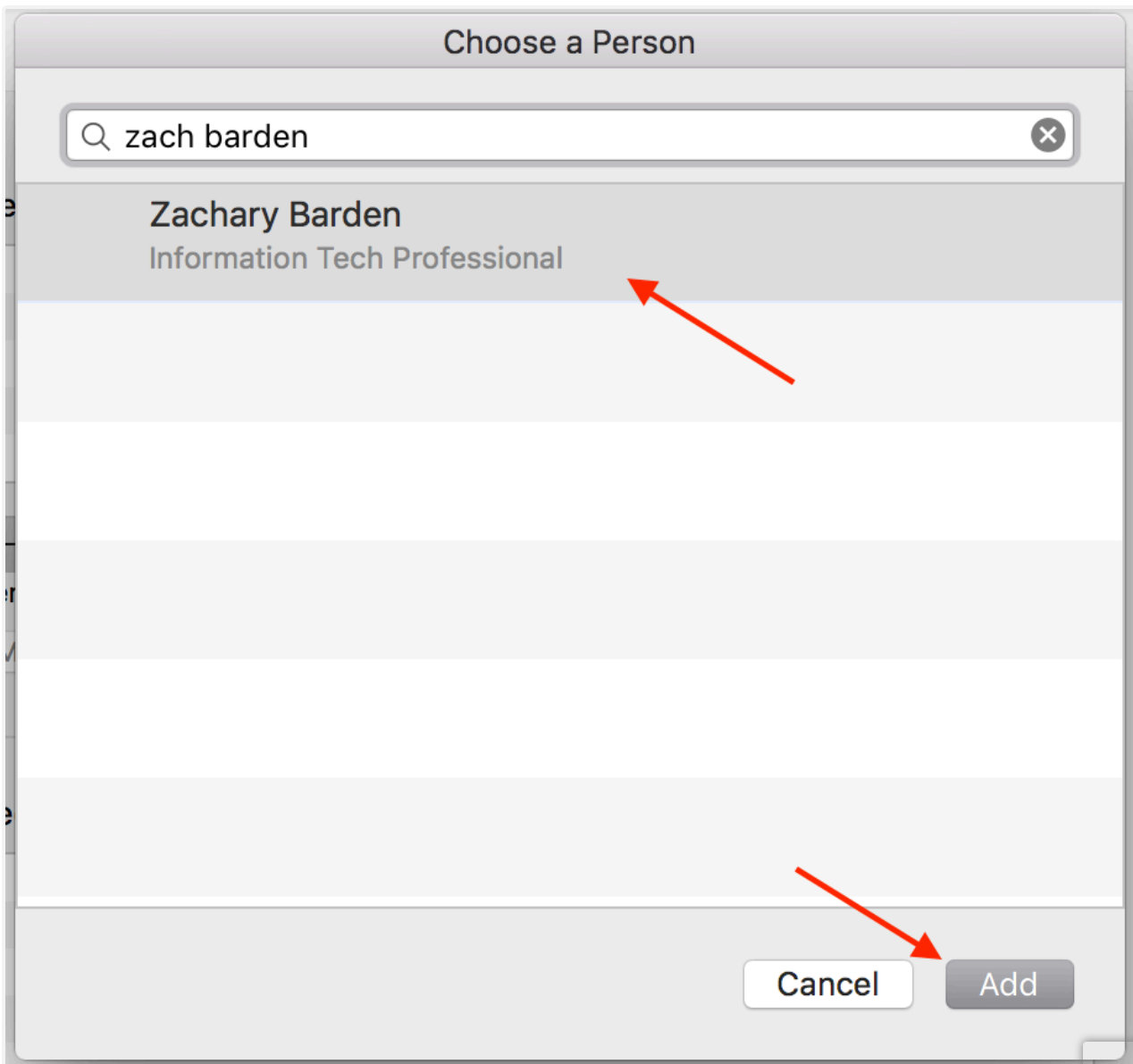
3. From the “**Accounts**” window, select your UVM Exchange account in the left column, then click the “**Advanced**” button.



4. Select the “**Delegates**” tab, then click the + symbol to add a delegate to your account.



5. Use the “**Search**” field to find the user you’d like to add as a delegate. Select the user you wish to add as a delegate from the search results, then click the “**Add**” button.



6. The “**Delegate Permissions**” window is where you configure the specific permissions your delegate will have.



- Delegate permissions can be set for Calendar, Tasks, Inbox, Contacts, and Notes. Most delegates will only need Calendar access.

NOTE:



Granting access to your inbox will allow your delegate to read your email messages.



- There are four delegate permissions levels: Editor, Author, Reviewer, and None. We recommend using default Editor permission. If you think your circumstances require a different configuration, please contact the UVM Tech Team so we can discuss the proper setup.
- If your delegate will be managing your calendar for you, you’ll want to check the “**Delegate receives copies of meeting-related messages sent to me**” checkbox. This checkbox will send your meeting request to the delegate. The delegate can then decide to accept, decline, or ask for the meeting to be scheduled at a different time on your behalf.



Permissions: Zachary Barden



 Calendar: Editor (Can Read, Create, Modify Items) 

☒ Delegate receives meeting invites

 Tasks: Editor (Can Read, Create, Modify Items) 

 Inbox: None 

 Contacts: None 

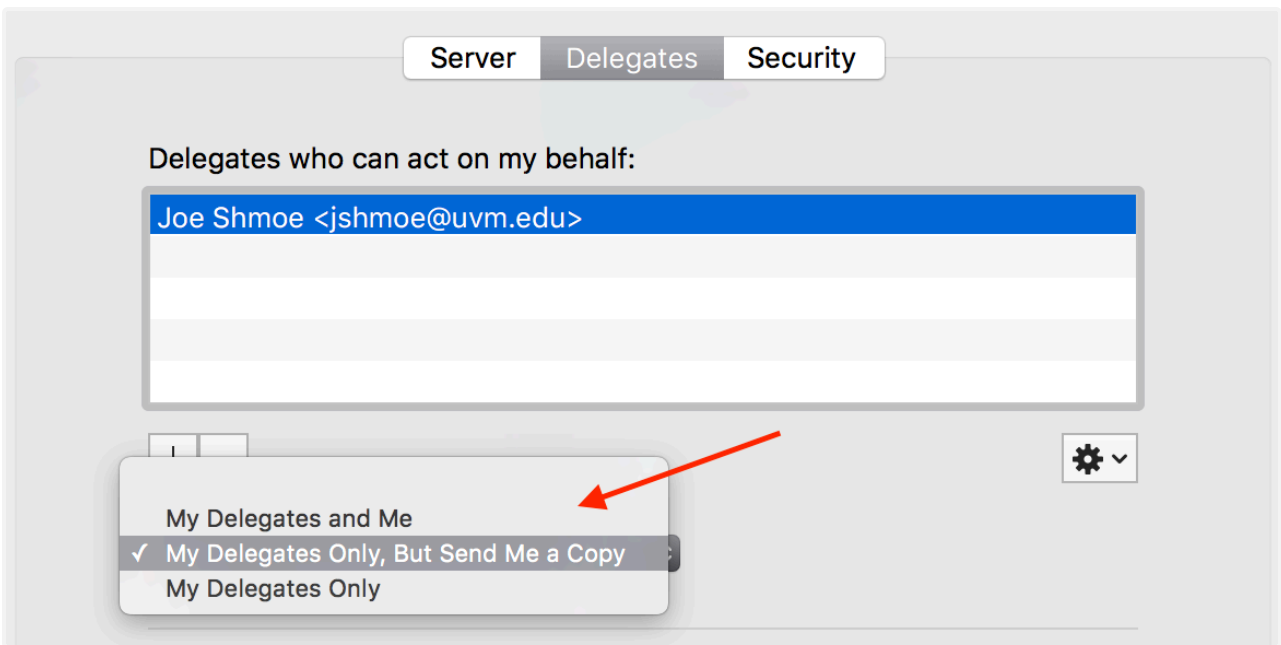
 Notes: None 

☒ Send permissions summary
Send message to delegate summarizing any updates to permissions.

☐ Delegate can see my private items

Cancel OK

7. Once you've added a delegate to your account, you'll be able to choose how you would like to handle your meeting related emails. We recommend sending meeting invites to your delegate, but choosing to receive a copy. Choose the option that makes the most sense for your use case.



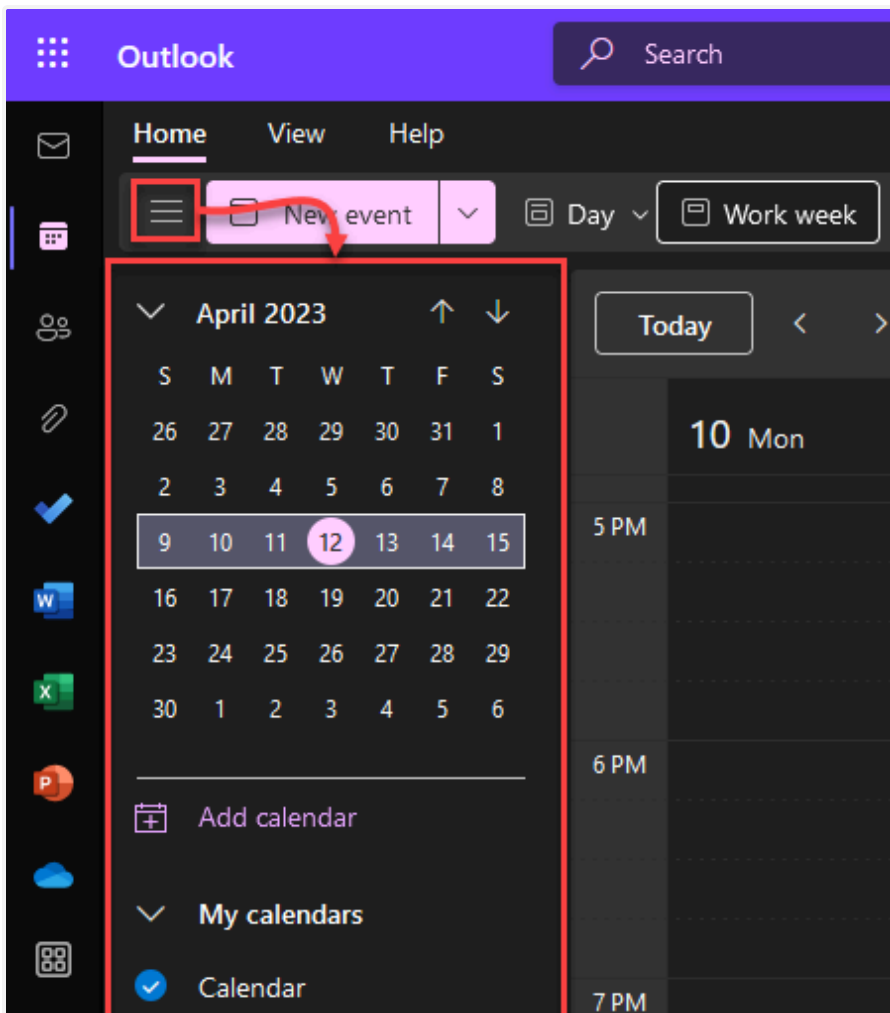
That's it. You've successfully granted Delegate Permissions to another user.


Outlook Online

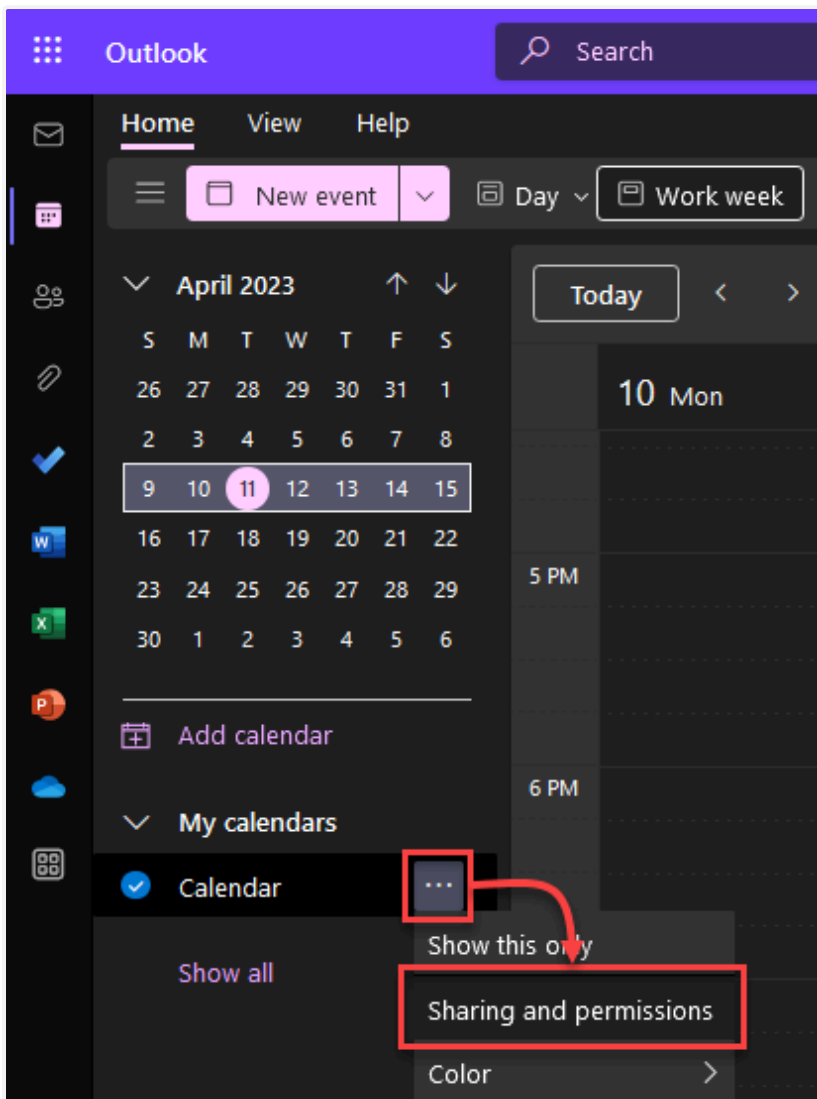
Mailbox delegation

Through the web interface it is only possible to delegate access to Calendars, not the "Send on behalf of" permission. For giving the latter without using the Windows/macOS app, please contact the [UVM Tech Team](#).

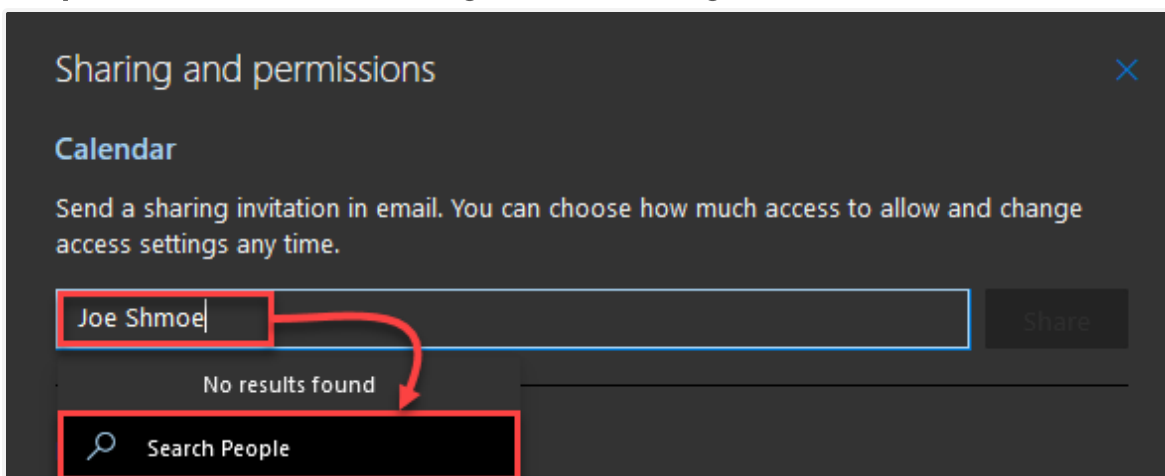
1. Log in to [Outlook Online](#) and switch to the **Calendar** view.
2. Make sure the Calendars pane is open to the left of the event view; if it's not, toggle it with the ≡ button.



3. Click on the  button next to the calendar you wish to grant delegate permissions to (Your default calendar is named "Calendar"). In the resulting drop-down menu, click **Sharing and permissions**.

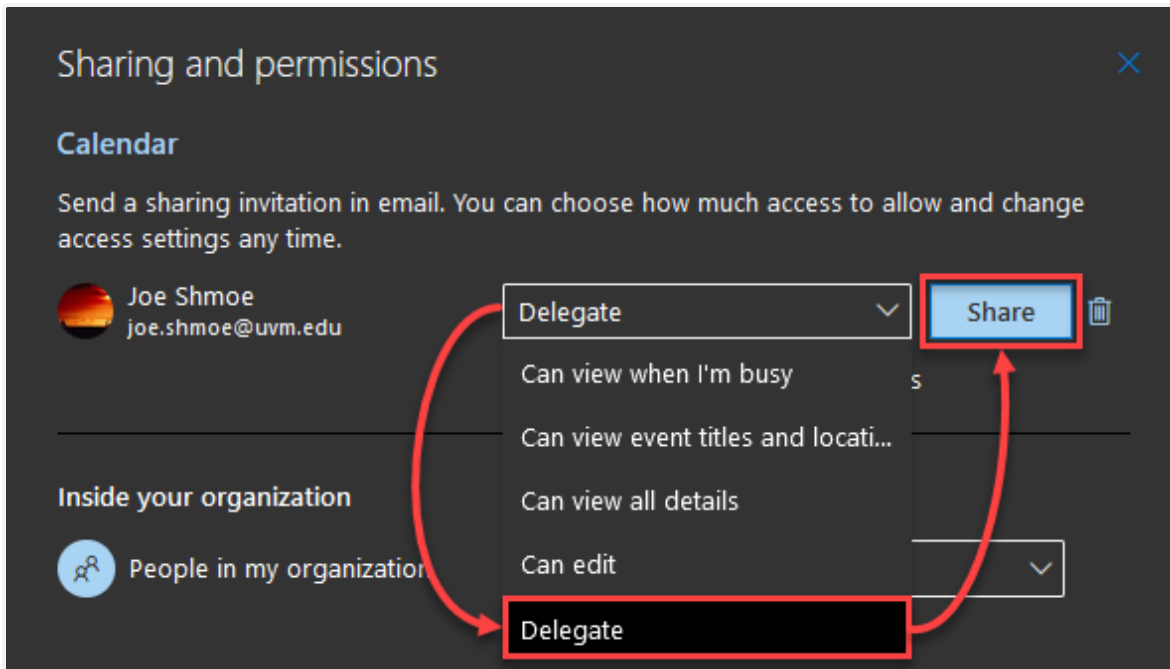


4. Enter the name of the user you wish to grant delegate permissions to, click **Search People**, and then click the delegate's user listing in the search results.



5. The chosen user's name and email address should now be shown. Open the drop-down menu to the right of their listing and select the **Delegate** option. Click **Share** to

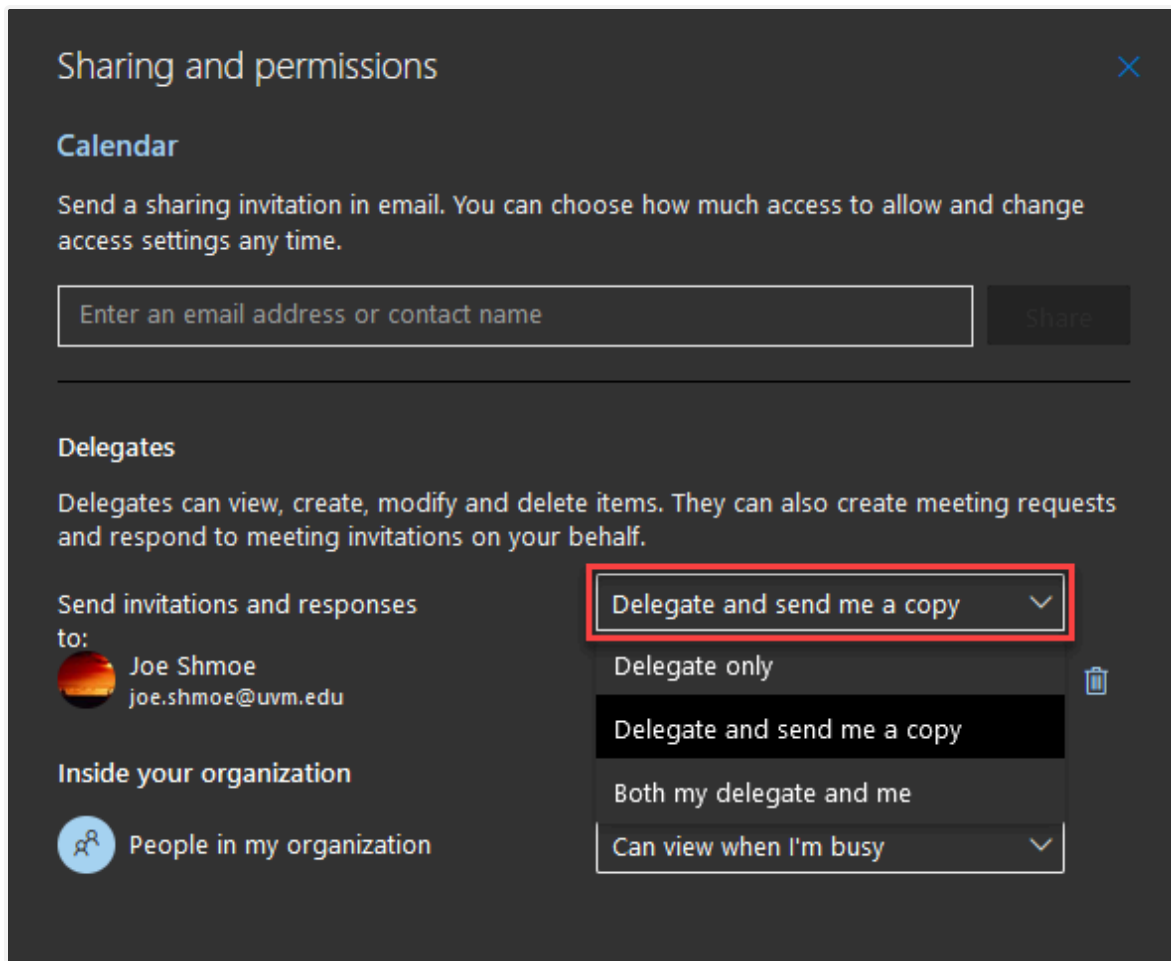
save these permission settings.



6. After delegating your calendar to someone, you must also specify how your meeting requests and response messages will be handled. Select your desired behavior for

Send invitations and responses to:

- **Delegate only** (Default) – Only your delegate will receive meeting requests and notifications.
- **Delegate and send me a copy** – this option will send your meeting invitation emails to your delegate, you will only receive a notification of meeting requests and response.
- **Both my delegate and me** – both you and your delegate will receive meeting requests and notifications. (Not recommended)

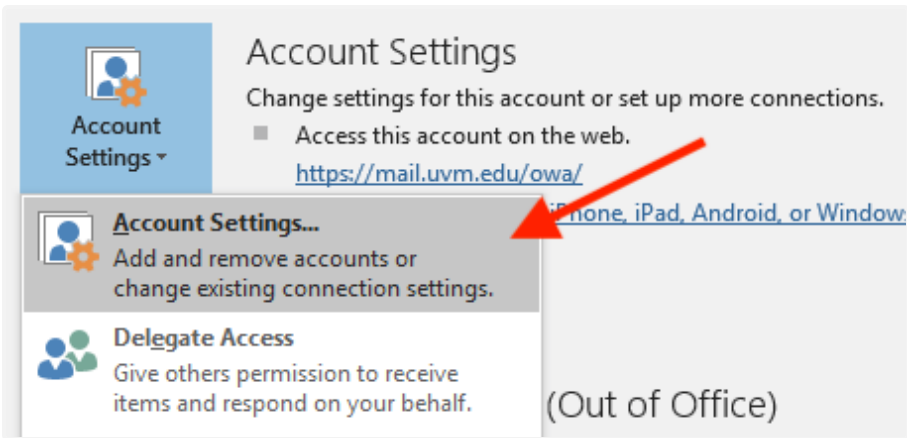


7. The **Sharing and permissions** menu can now be closed. To verify that the delegate's permissions have been set correctly, the delegate should add the account in their Outlook app; see [Opening a Delegate Account](#).

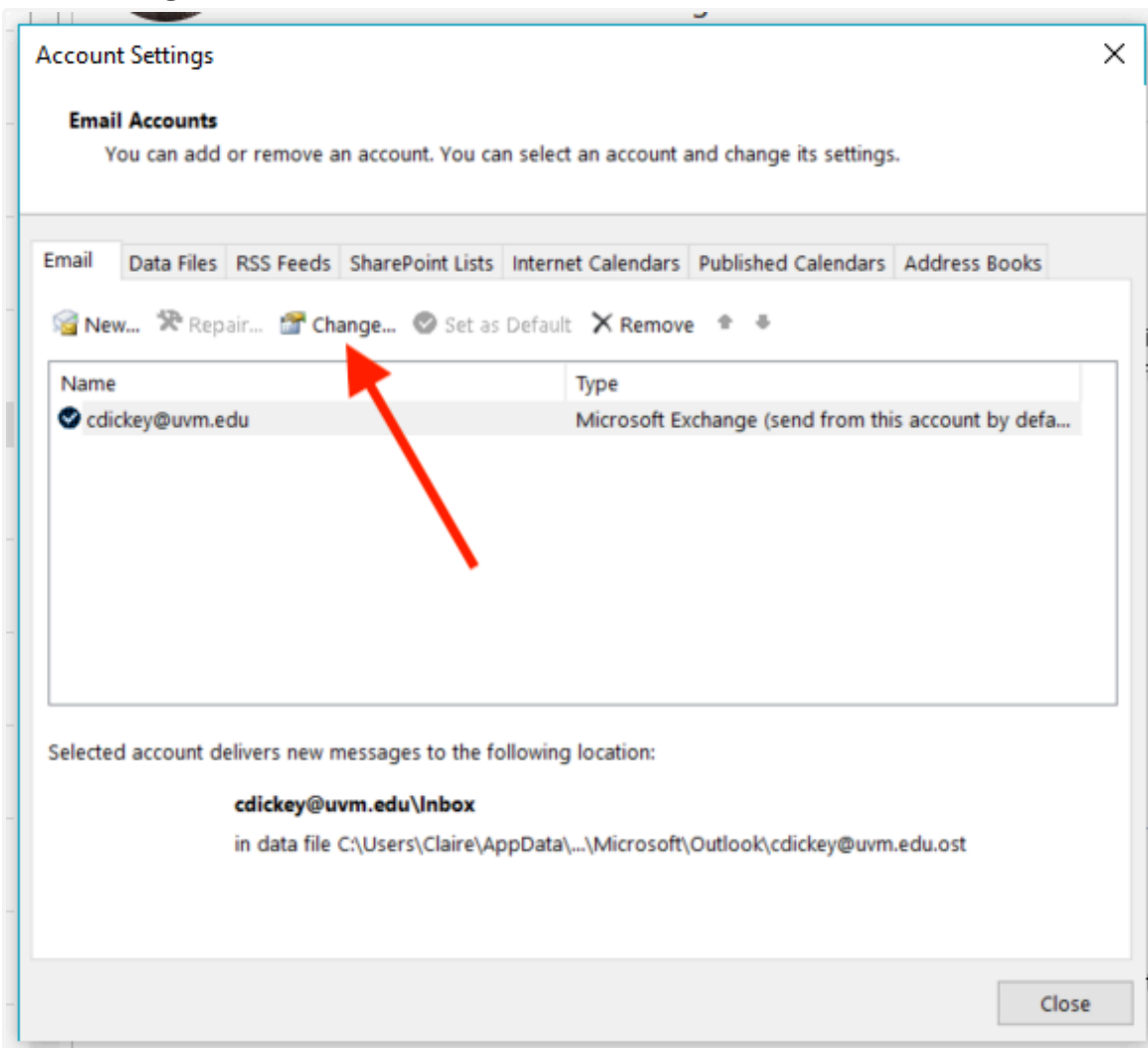
Opening a Delegate Account

Outlook (Windows)

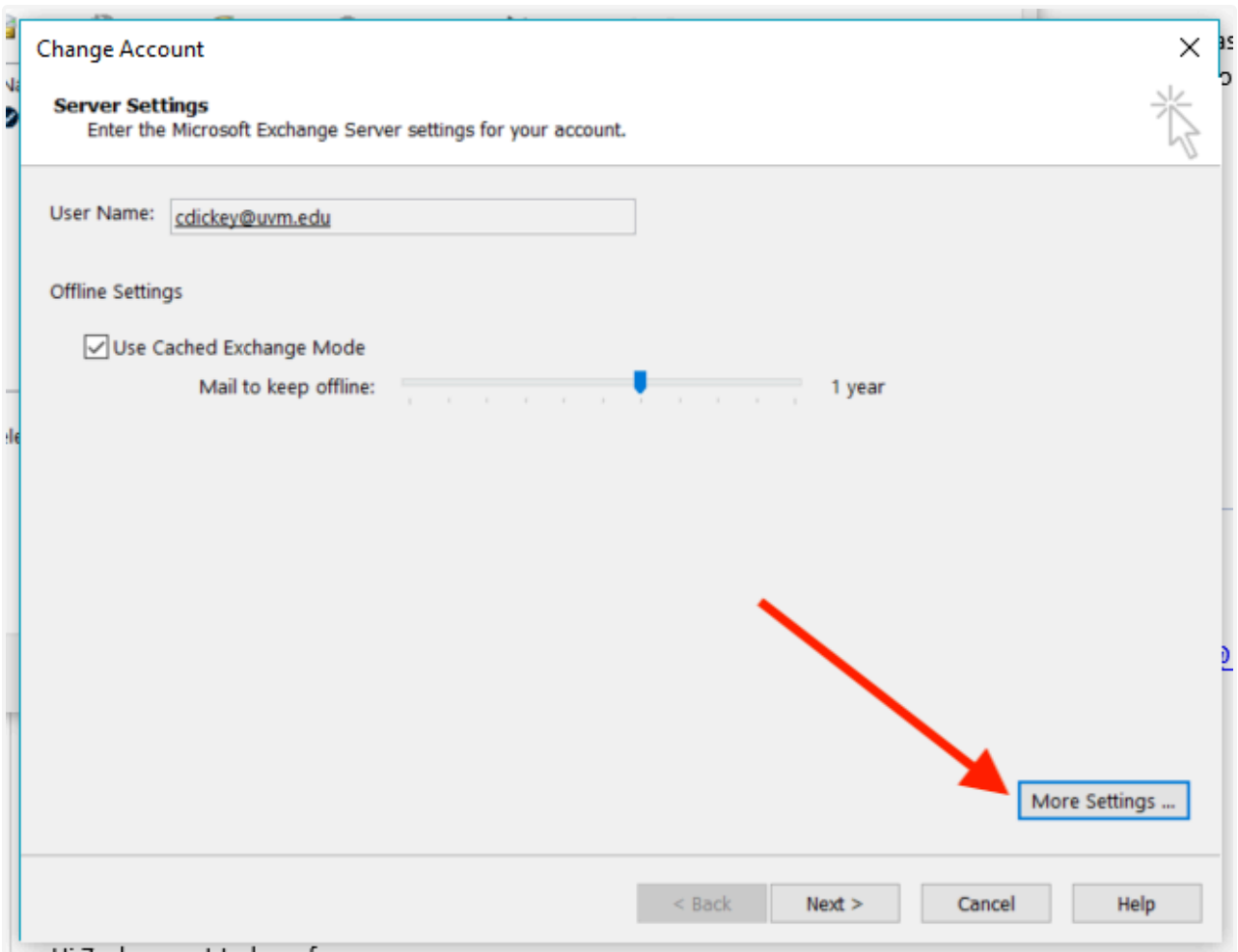
1. Open the **Outlook** application, then click **File**.
2. Select **Account Settings > Account Settings...**



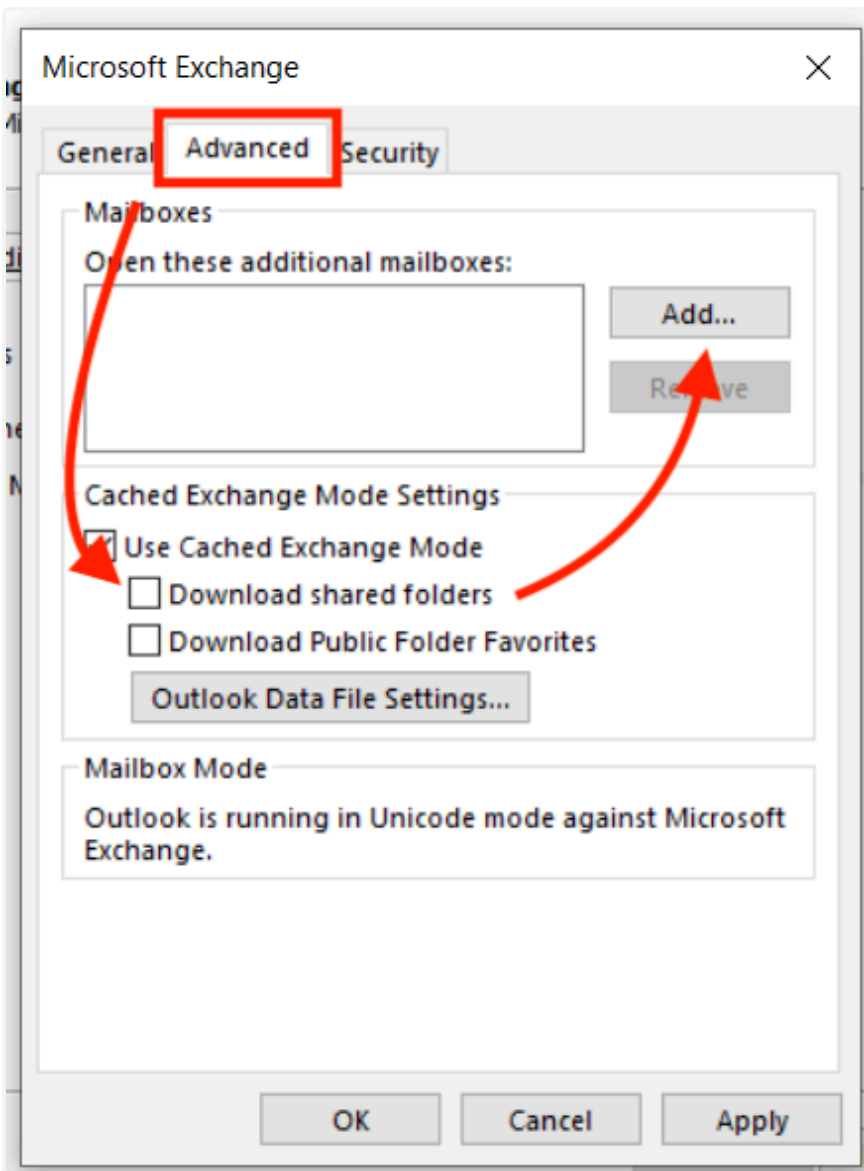
3. Click **Change...**



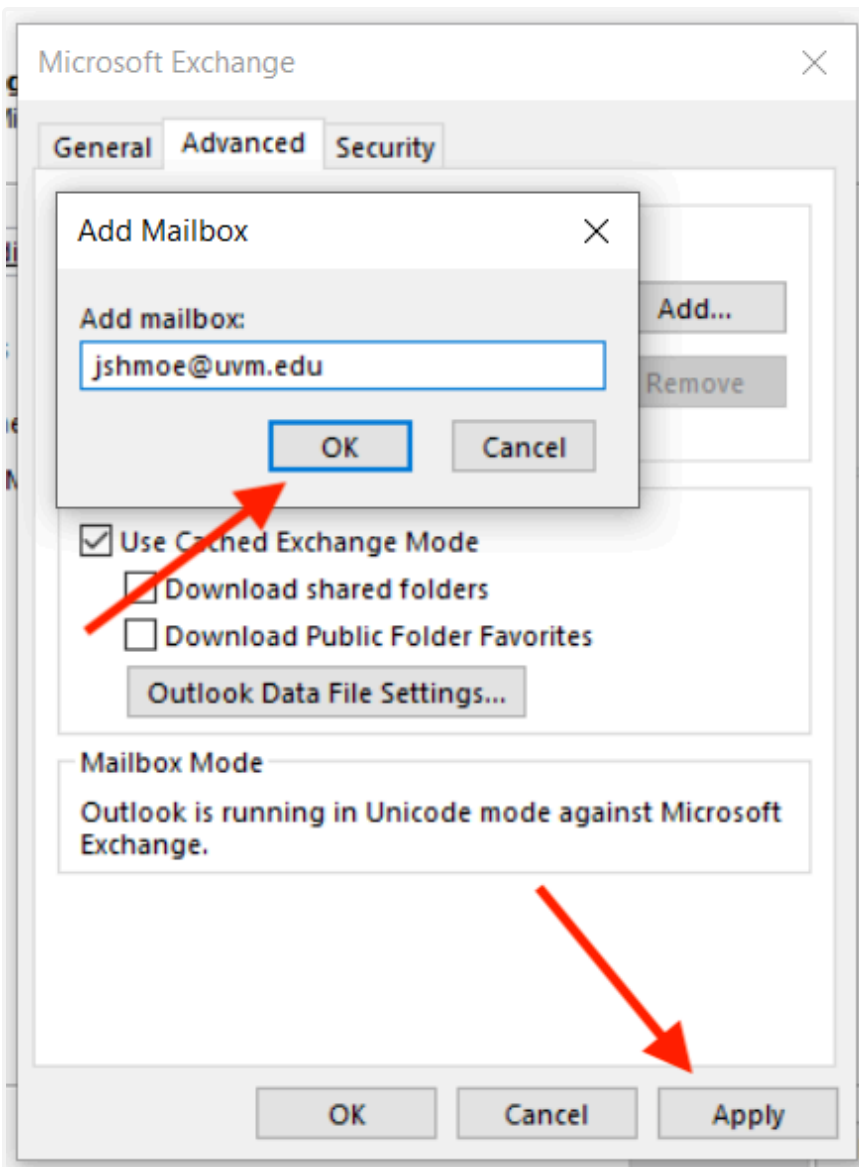
4. Click **More Settings ...**



5. Select the **Advanced** tab, make sure the **Download shared folders** checkbox is **NOT** checked, then click **Add...**

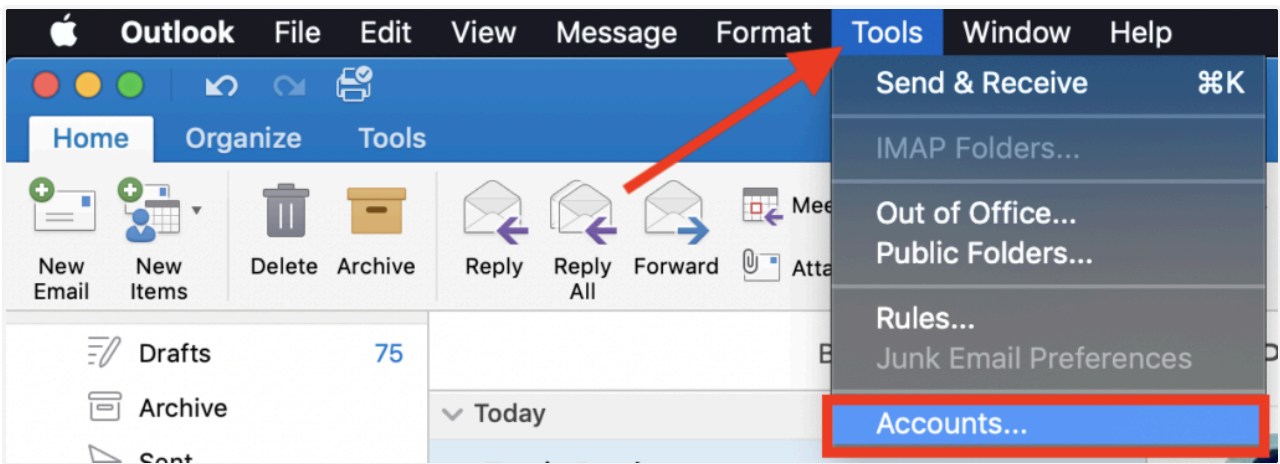


6. Type in the email address for the account you have delegate access to, click **OK**, then **Apply**.

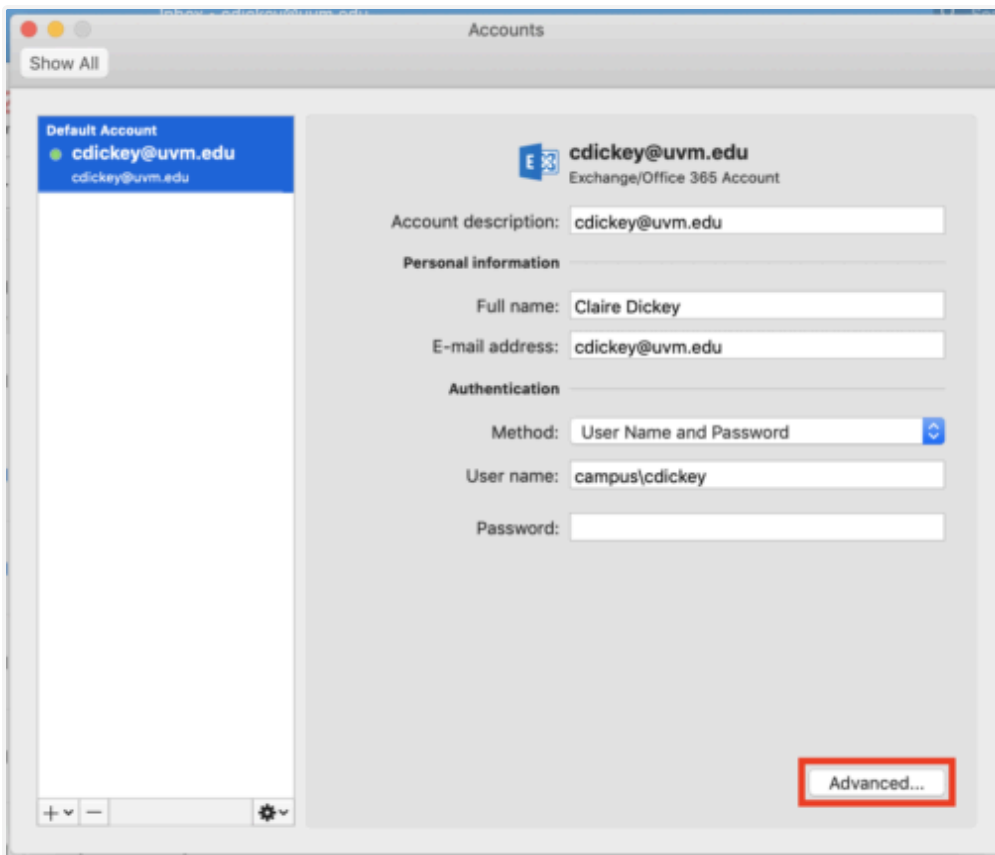


Outlook (macOS)

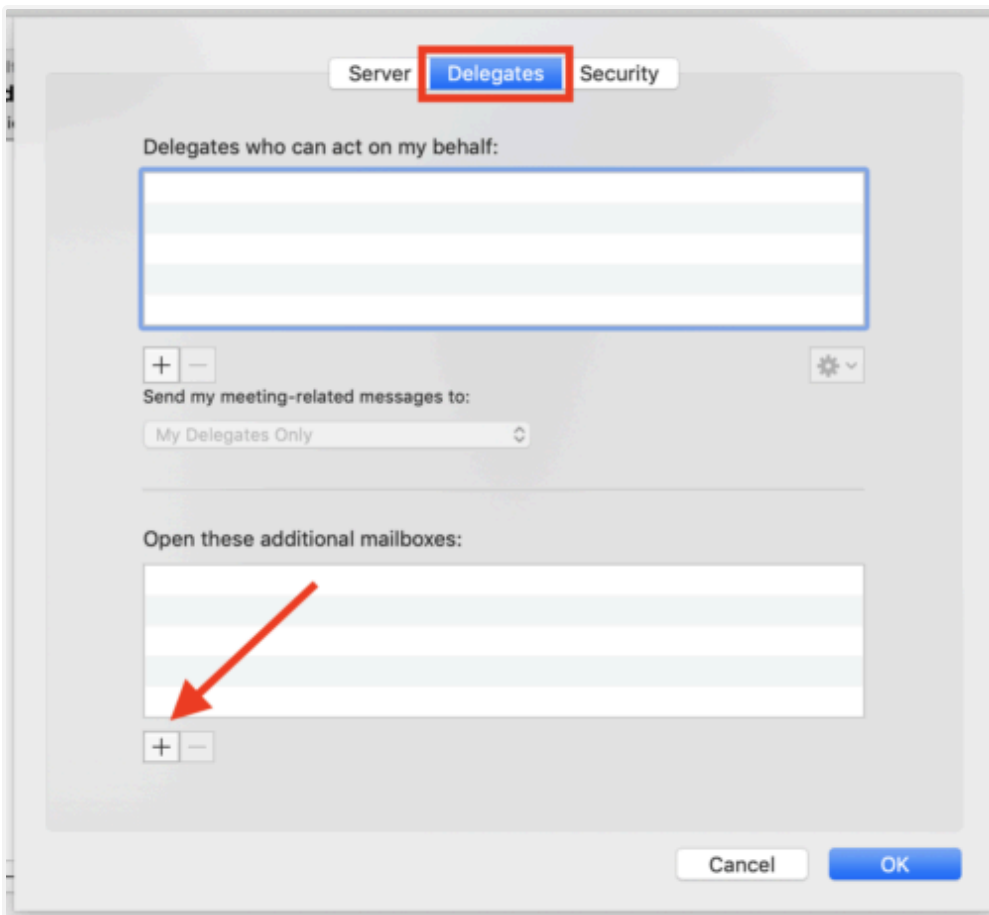
1. Open the **Outlook** application.
2. Select **Tools > Accounts...** and select your UVM email account. (It will already be selected if it is your only account.)



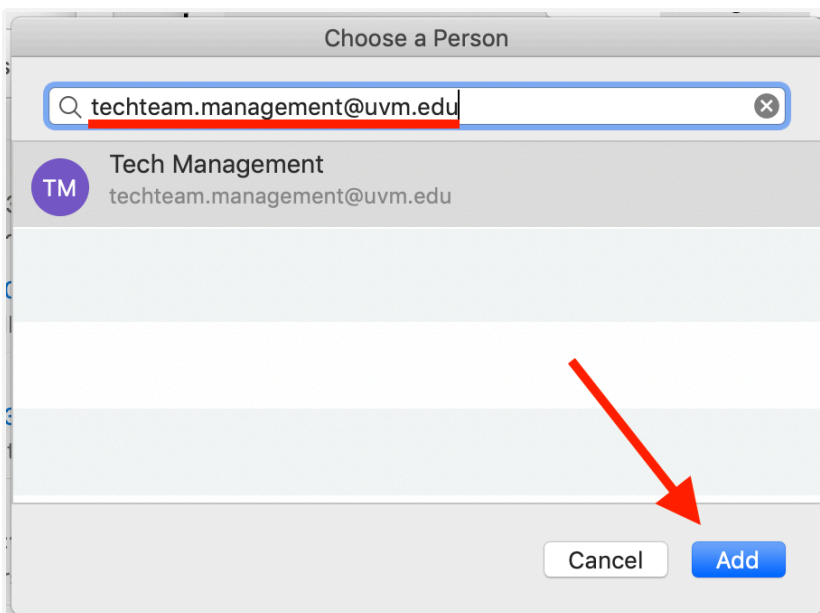
3. Click **Advanced...**



4. Select the **Delegates** tab then click the **+** below **Open these additional mailboxes:**



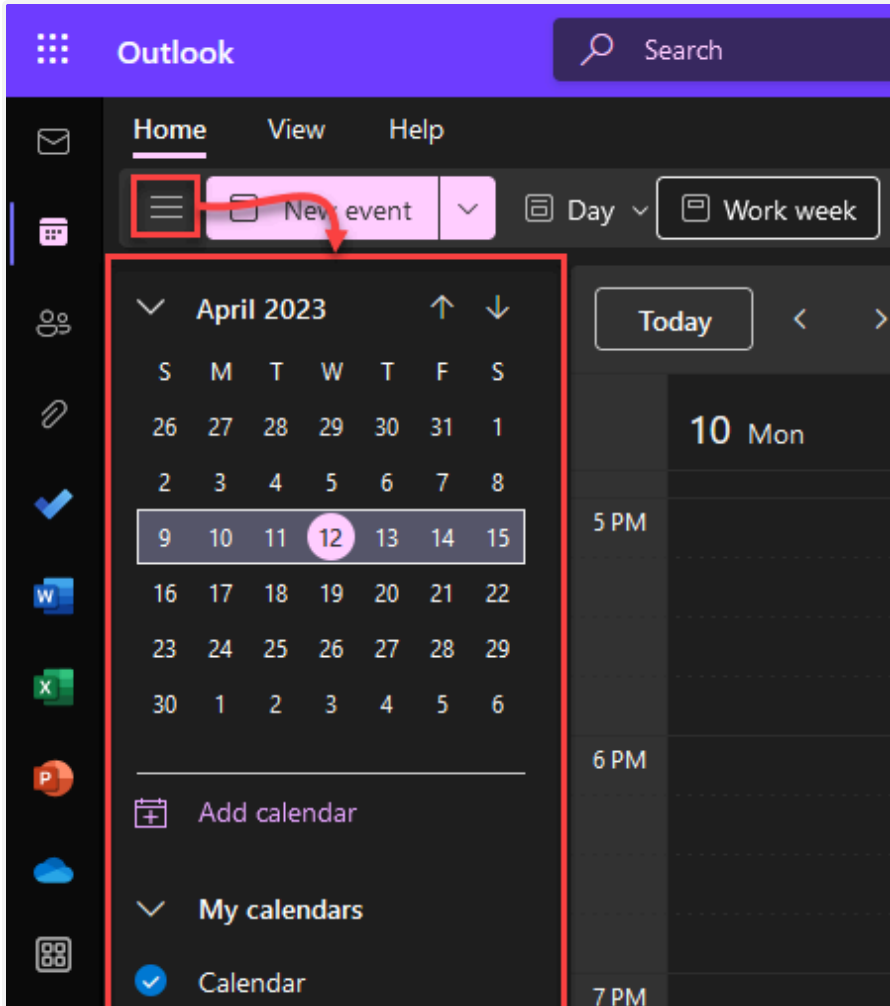
5. Type in the email address for the account you have delegate access to, then click **Add**.



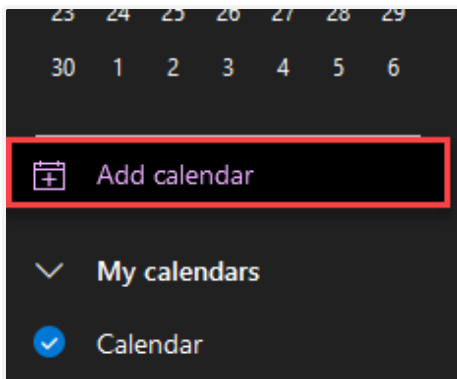
6. Click **OK**.

Outlook Online

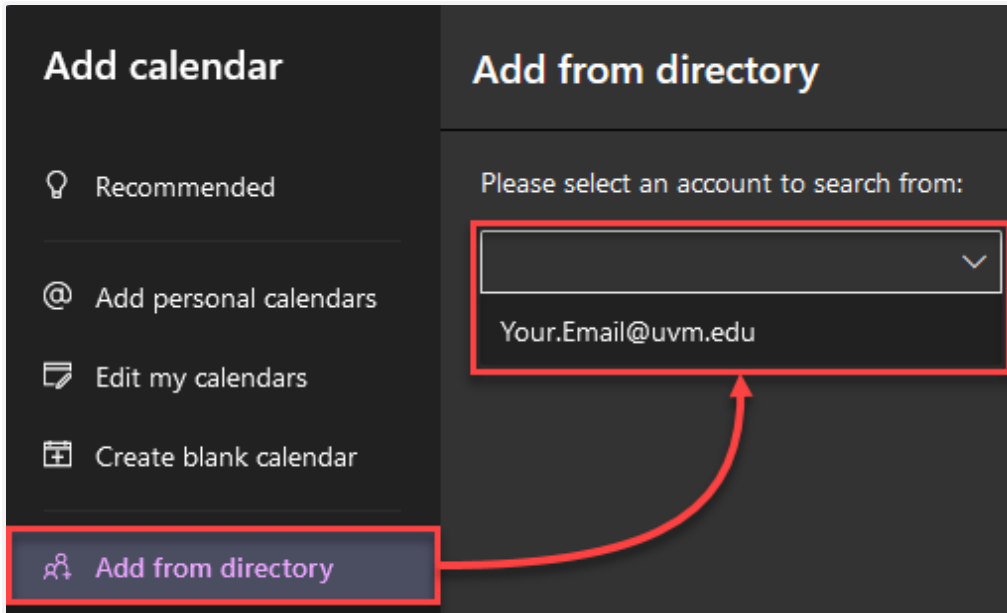
1. Log in to [Outlook Online](#) and switch to the **Calendar** view.
2. Make sure the Calendars pane is open to the left of the event view; if it's not, toggle it with the ≡ button.



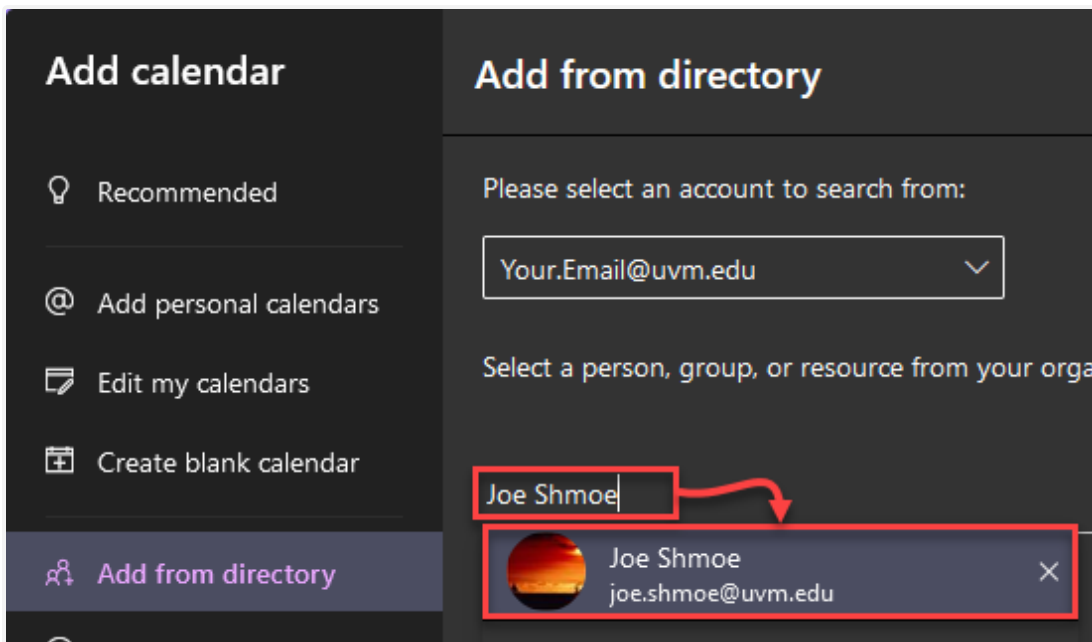
3. Click the **Add calendar** button above your list of calendars in the Calendars pane.



4. Click the **Add from directory** button, then select your own account from the drop-down.

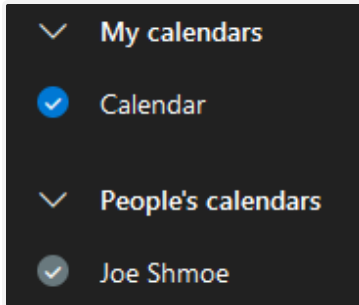


5. Type in the name or email address for the shared mailbox, select it from the results, and then click **Add**.



6. A success message should show at the bottom of the **Add calendar** pane, which can now be closed. Now that it is added, the shared calendar should now be visible in the

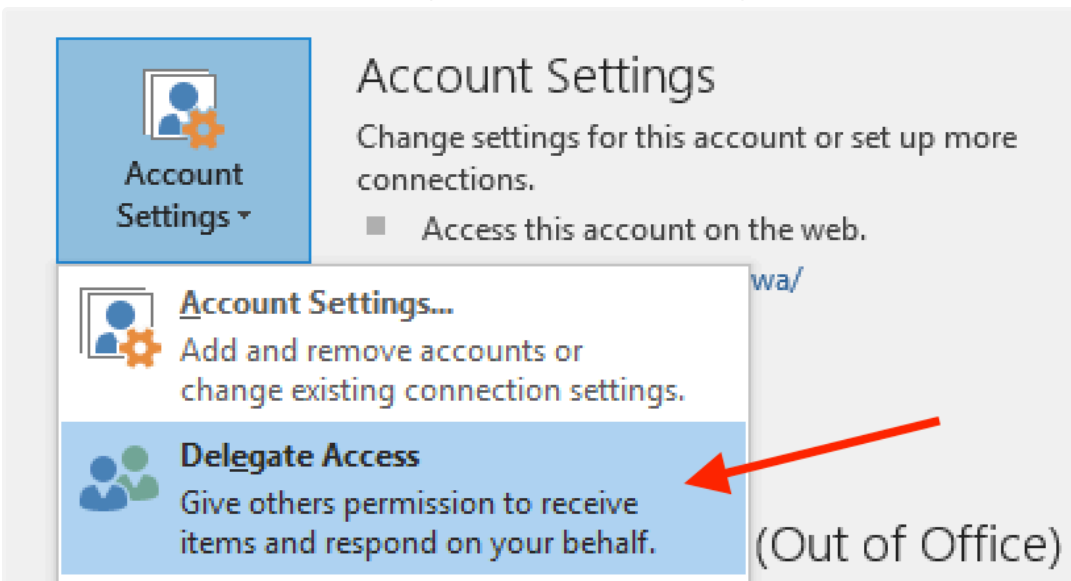
People's calendars group, and its events shown in the events pane.



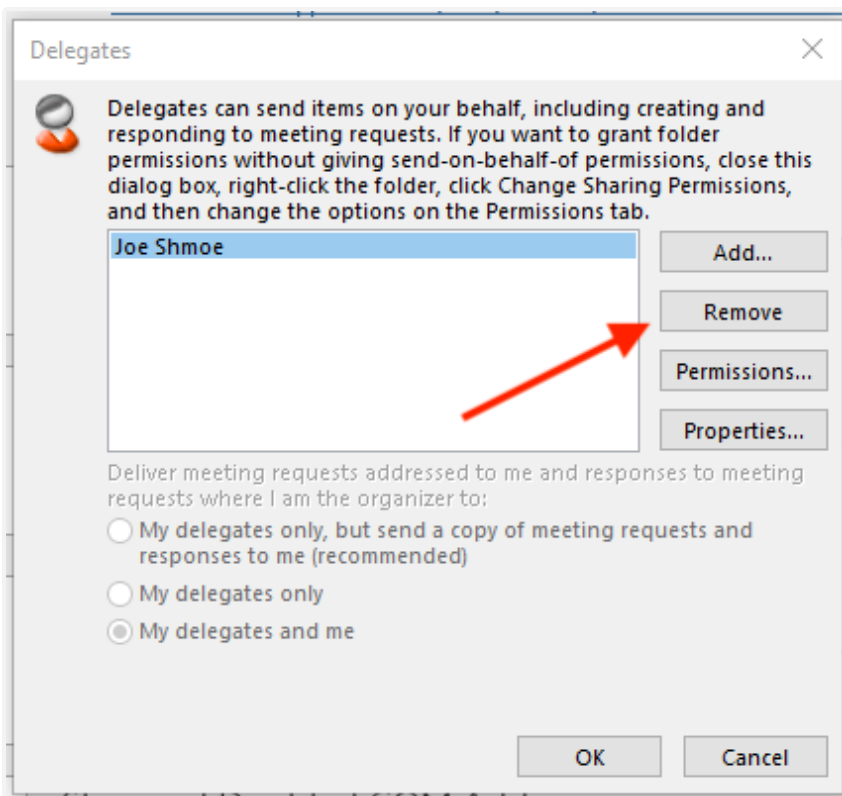
Removing Delegate Permissions

Outlook (Windows)

1. Open the **Microsoft Outlook** application.
2. Click the **"File"** menu in the top left corner of the Outlook window. Under the **"Info"** tab, click on **"Account Settings"** then select **"Delegate Access"**.



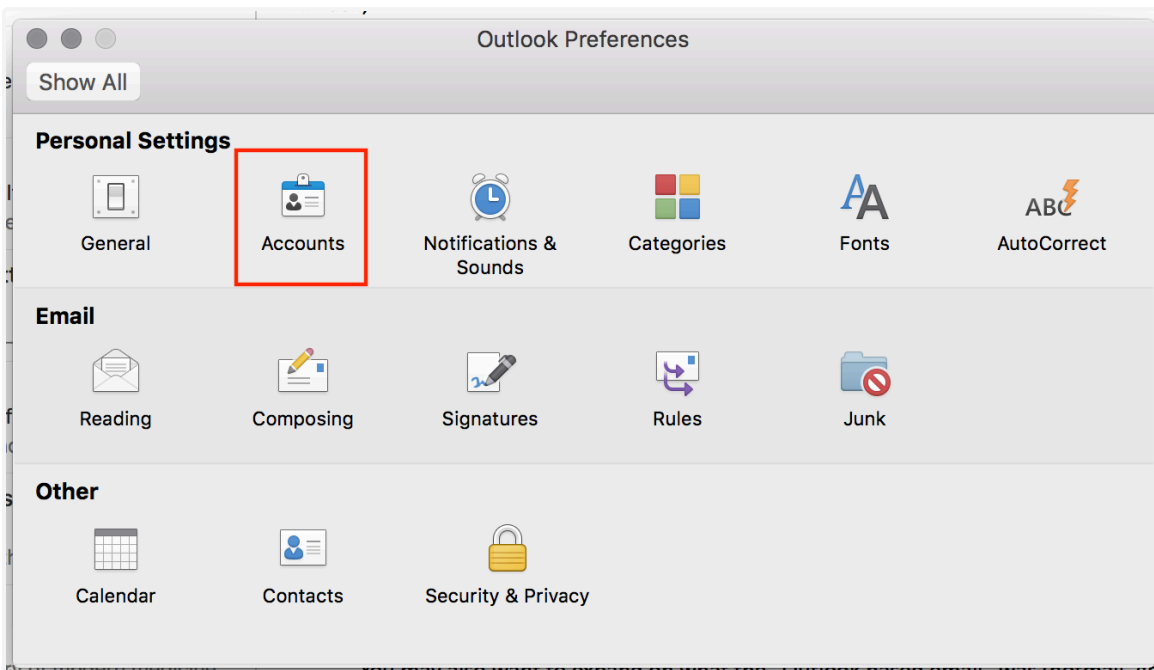
3. The **"Delegates"** window will appear. Click on the delegate you wish to remove, click **"Remove"**, then **"OK"**.



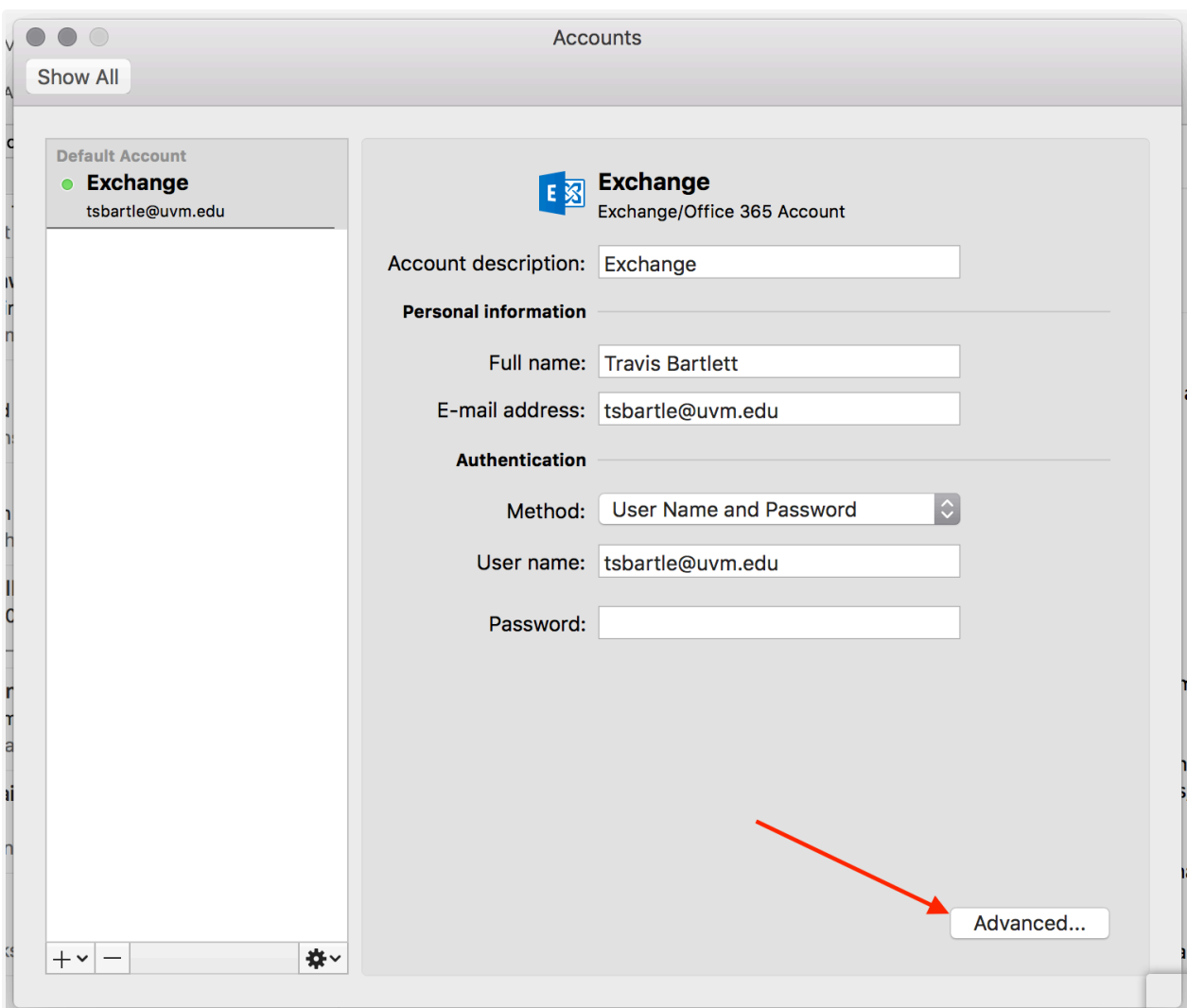
The delegate should now be removed.

Outlook (macOS)

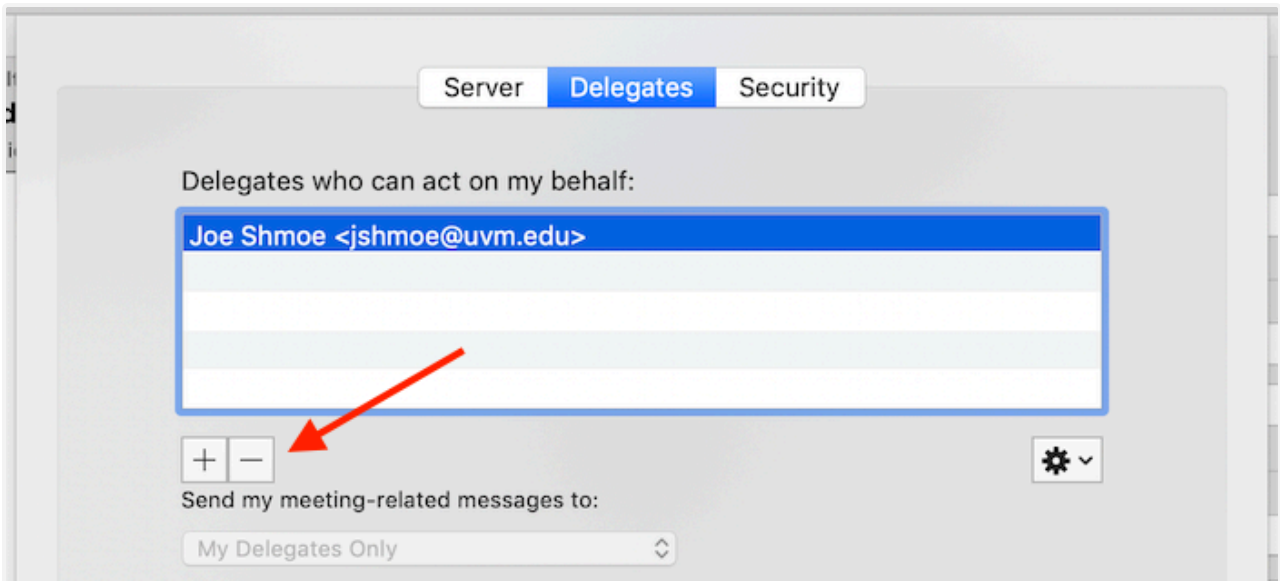
1. Open the **Microsoft Outlook** application.
2. Click the “**Outlook**” menu in the top left corner of your screen, then click on “**Preferences**”. From the preferences window, click on “**Accounts.**”



3. From the “**Accounts**” window, select your UVM Exchange account in the left column, then click the “**Advanced**” button.



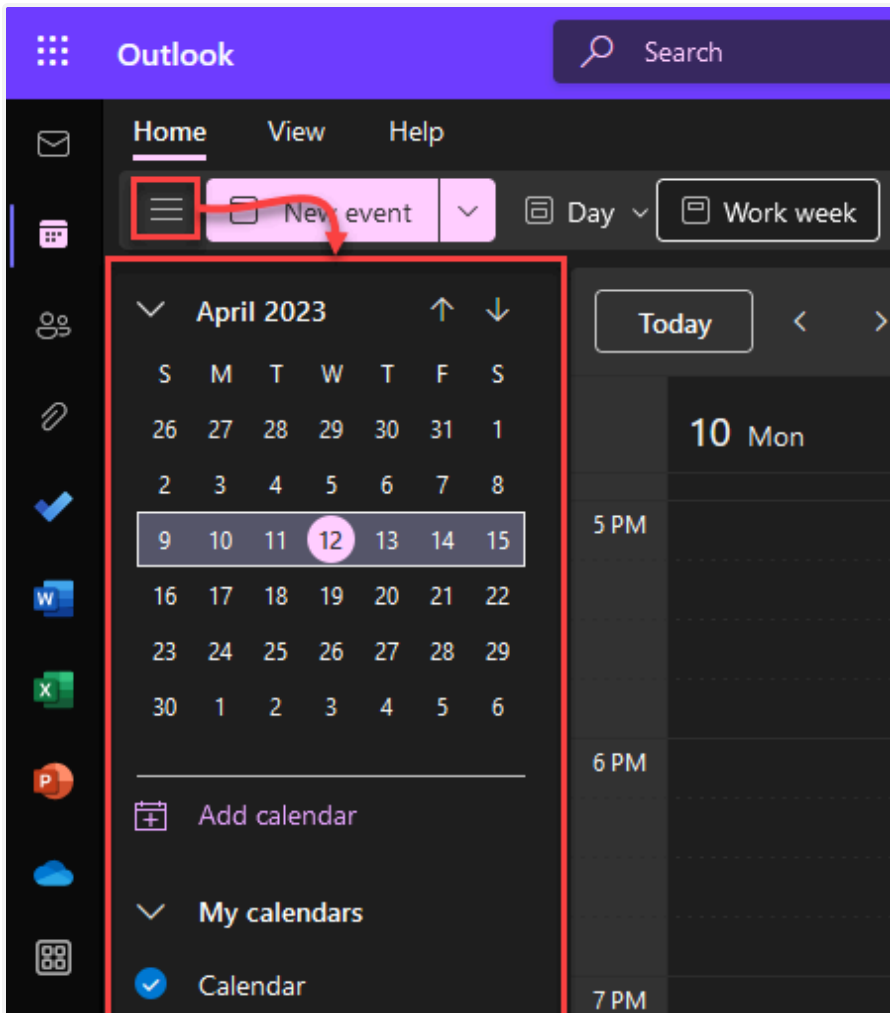
4. Select the “**Delegates**” tab, click the delegate you wish to remove, then click the – symbol to remove the delegate from your account.




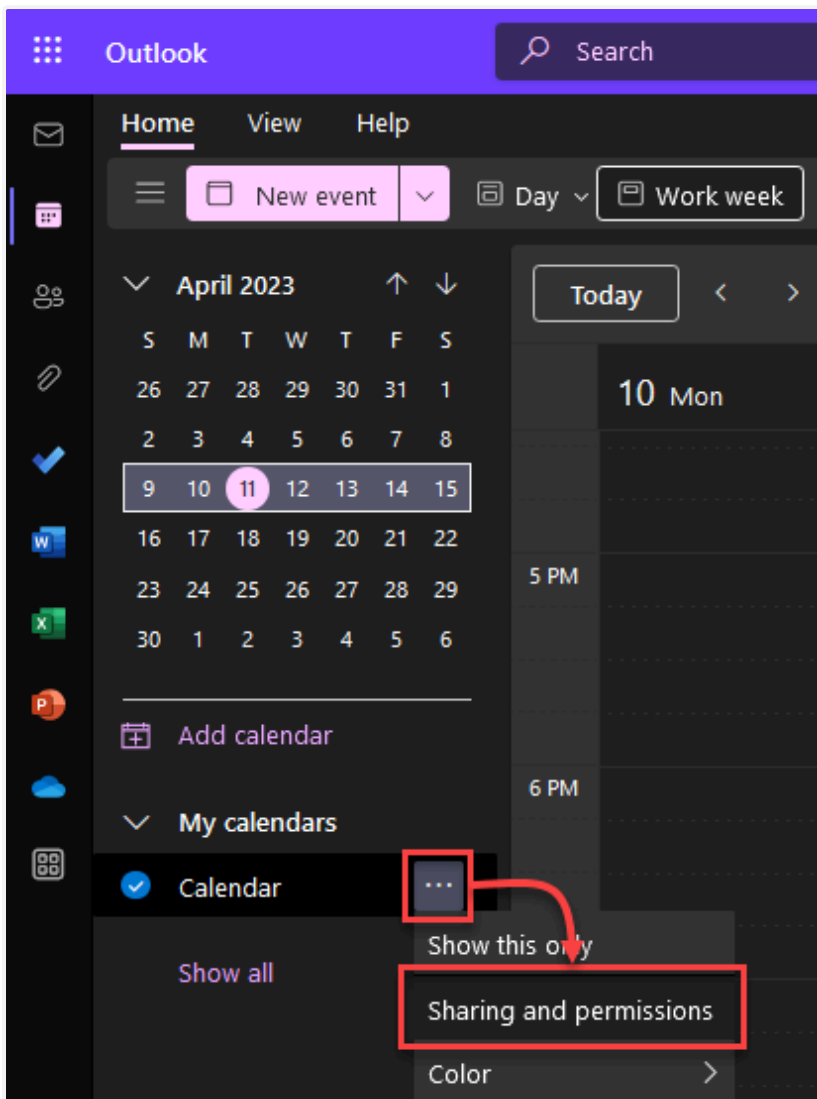
The delegate should now be removed.

Outlook Online

1. Log in to [Outlook Online](#) and switch to the **Calendar** view.
2. Make sure the calendars pane is open to the left of the event view; if it's not, toggle it with the ≡ button.



3. Click on the  button next to the calendar you wish to change delegate permissions for (Your default calendar is named "Calendar"). In the resulting drop-down menu, click **Sharing and permissions**.



4. This will bring up the permissions window for that calendar. Click the wastebasket () symbol next to the delegate you wish to remove.

Sharing and permissions

Calendar

Send a sharing invitation in email. You can choose how much access to allow and change access settings any time.

Enter an email address or contact name

Share

Inside your organization

People in my organization

Can view when I'm busy

Joe Shmoe
joe.shmoe@uvm.edu

Delegate

5. You can now close the **Sharing and permissions** window. The delegate should no longer have access.

“Send As” or “Send on Behalf” only Permissions

In some cases, a mailbox owner may elect to grant only Send As or Send on Behalf permissions to their mailbox instead of full access through delegate permissions.

Need help adding Send As or Send on Behalf permissions?

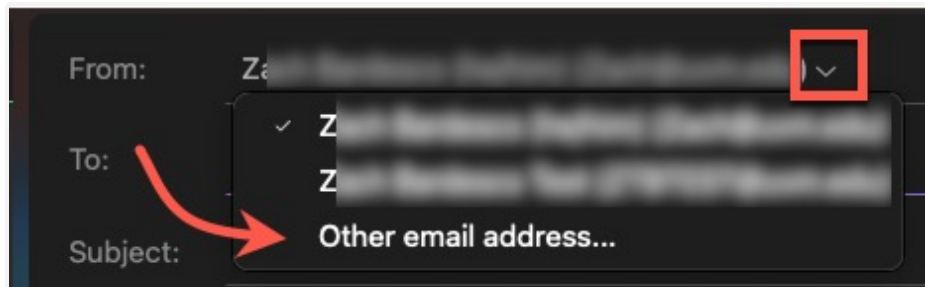
To request that these permissions be managed for an account you own, [contact the Tech Team](#).

macOS

Are you looking for the other address to persist in the list of From addresses?

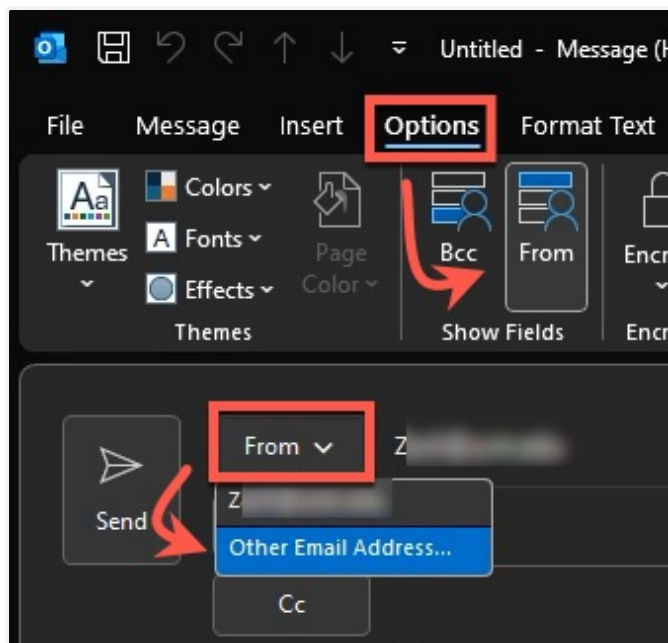
Follow the [instructions above for opening a delegate account](#). After opening the delegate account, the address will continue to be available when composing a new message.

When composing a new email, click the down arrow in the right of the **From** box, then select **Other email address** and enter the email address of that account you have permission to send as, then select it.



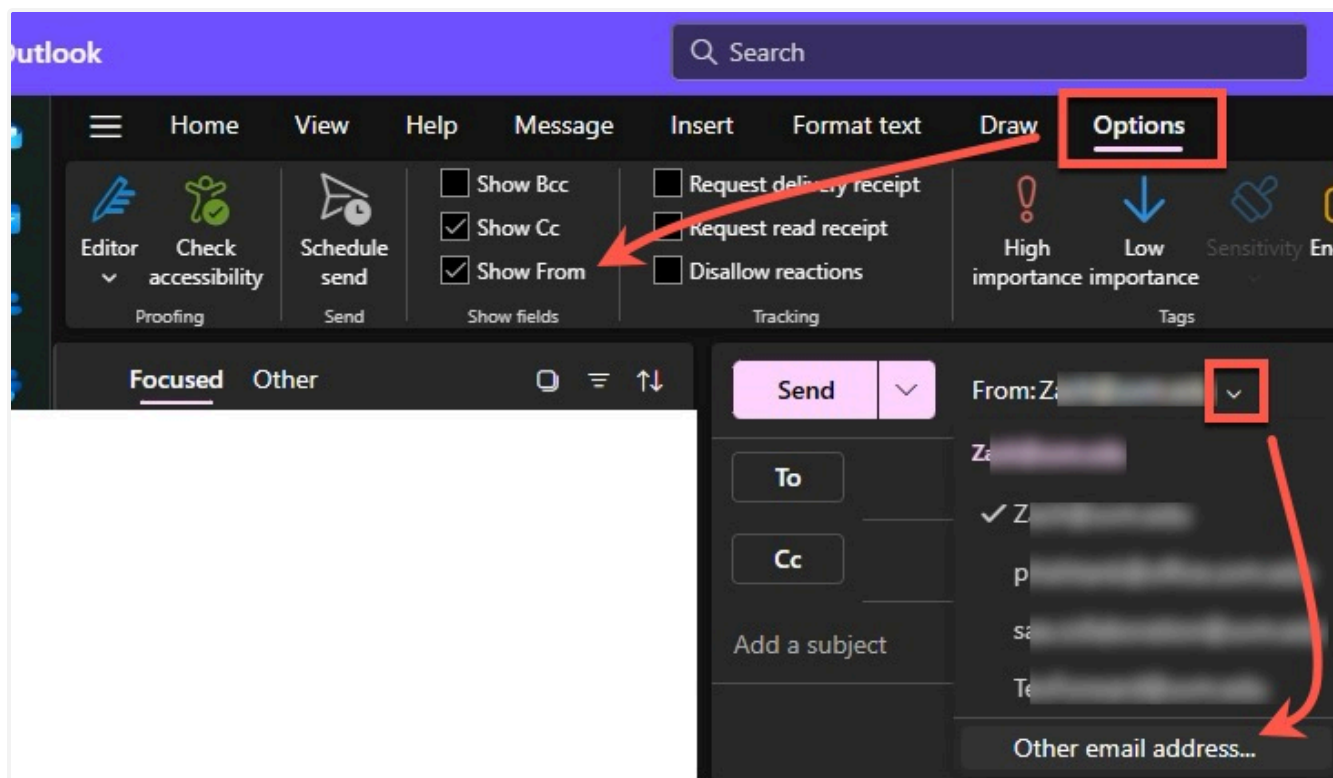
Windows - Outlook Classic

While composing a new email, ensure the **From** box is checked in the Outlook Options tab. Then click the down arrow to the right of the **From** box, select **Other email address**, enter the email address of that account you have permission to send as, and click **OK**.



Windows - New Outlook

While composing a new email, ensure the **Show From** box is checked in the Outlook Options tab. Then click the down arrow to the right of the **From** box, select **Other email address**, enter the email address of the account that you have permission to send as, and click **OK**.



Additional Permissions

Calendar Organization as a Delegate

Outlook allows the use of Categories and color coding for organization purposes. This can be especially useful for your calendar. Unfortunately, a normal delegate will not be able to fully utilize this system without additional permissions being granted.

- You must have **Owner** permissions granted to create or delete categories in another user's folder.

- You cannot rename categories in another user's folder regardless of permission level due the the way outlook handles that operation. Ask the user to rename it for you.

Updated on October 7, 2024

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Tagged: exchange Exchange Online

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