

GSD. Outlook - Delegate Access in Outlook Application

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General Information:

Possible symptoms/errors:

User wants to know how to Delegate Access in Outlook Application

Alternative names of the system:

n/a

IMPORTANT NOTICE:

n/a

Solution:

Similar to having assistant, another person known as a delegate, can receive and respond to email messages and meeting requests and responses on user's behalf. The following steps will guide how to delegate access.

Details:

In the Outlook, user must click on File.

Under Info, advise them to click Account Settings > Delegate Access.

In the Delegates window, inform them to click the Add button.

In the Address book window, advise user to enter the name of the user they would like to grant access and delegate rights to. User must select the name in the search results then click Add then OK.

In the Delegate Permissions window, user can configure the specific permissions their delegate will have.

Delegate permissions can be set for Calendar, Tasks, Inbox, Contacts, and Notes.

There are four Delegate permissions levels:

None - No access
Reviewer - can read items
Author - can read and create items
Editor - can read, create and modify items

Advise user to select Delegate receives copies of meeting-related messages sent to me checkbox if their delegate will be managing their calendar for them. This checkbox will send them 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 user's behalf.

User must select the checkbox Automatically send a message to delegate summarizing these permissions if they want to send a message to notify the delegate of the changed permissions.

Advise them to select the Delegate can see my private items checkbox if they want delegate to see their private items. 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.

NOTE: User must not rely on the Private feature to prevent other people from accessing the details of their appointments, contacts, or tasks. To ensure that other people cannot read the items that they mark as private, advise user to do not grant them Reviewer (can read items) permission to their Calendar, Contacts, or Tasks folder.

Once done, user must click OK.

In case user would like to allow the delegate to send or respond to meeting requests, they must select My delegates only, but send a copy of meeting requests and responses to me (recommended) and click OK.

If user has selected the Automatically send a message to delegate summarizing these permissions option in the Delegate Permissions window, the delegate will receive an email as shown below:

Assignment Group:

3rd Party e-mail address: One365Support@freseniusmedicalcare.com

Ticket Creation:

Template: N/ACategorization:

Configuration Item: N/ACategory: N/ASubcategory: N/A

Important Links:

N/A