## Delegate Access (Used to be called "Proxy" Access)

Delegate Access allows one person to **act on behalf of another person**. The most common scenario where this is used is a manager and their assistant. The assistant may be responsible for maintaining the

managers schedule, including creating and responding to meeting requests, as well as responding to emails on the managers behalf. This is different from folder sharing. Folder sharing allows you to grant different permission/access levels to specific mail folders, Contacts or Calendar. It does not allow the other person to act on your behalf. When a delegate has Send on Behalf permissions, the delegate can compose an e-mail message and enter the manager's name in the 'From:' field. Recipients of the e-mail message will see the words Delegate Name on behalf of Manager Name next to 'From:'.

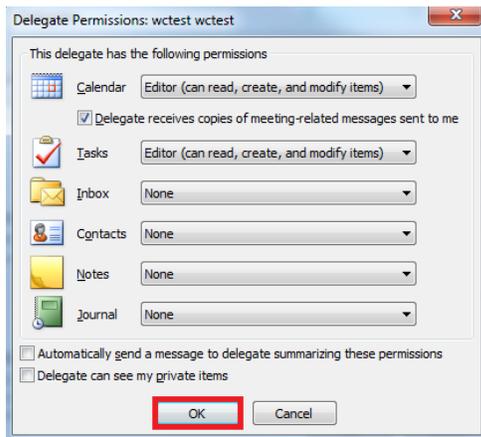**Giving Delegate Access:** (Used to be called providing "**Proxy**" Access in Groupwise)

1. Click on "File" – "Info" – "Account Settings" – "Delegate Access"
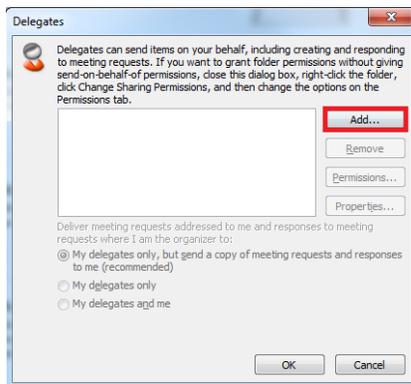
2. Click on "Add"
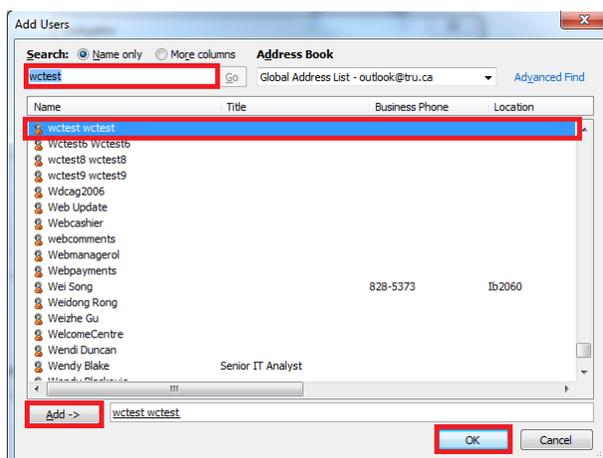
3. Search for the name of the mailbox or resource and highlight the name and click "Add". Click "OK".

4. This is the default access provided. You can configure additional access as required. Click "OK".

The default access gives the delegate Send on Behalf permissions and allows the delegate to:

1. Respond to meeting requests sent to you.
2. Receive meeting request responses sent to you.
3. Create and send email messages on your behalf. When received by the recipient the email message will show delegate name on behalf of your name next to the 'From:' field

By default the delegate has No access to your Inbox. This means they cannot view any items in your Inbox. If you want the delegate to have access to your Inbox, change the Inbox access from 'None' to:

Reviewer – read only access

Author – can read and create items

Editor – can read, create and modify items

NOTE: If you grant your delegate access to your Inbox, you need to share your mailbox and Inbox with them. See the links below:
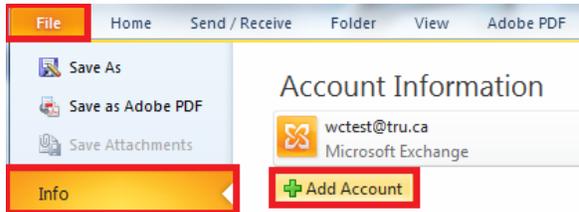
Important information regarding shares.

Please Read: http://www.tru.ca/__shared/assets/share_shared_mailbox28465.pdf
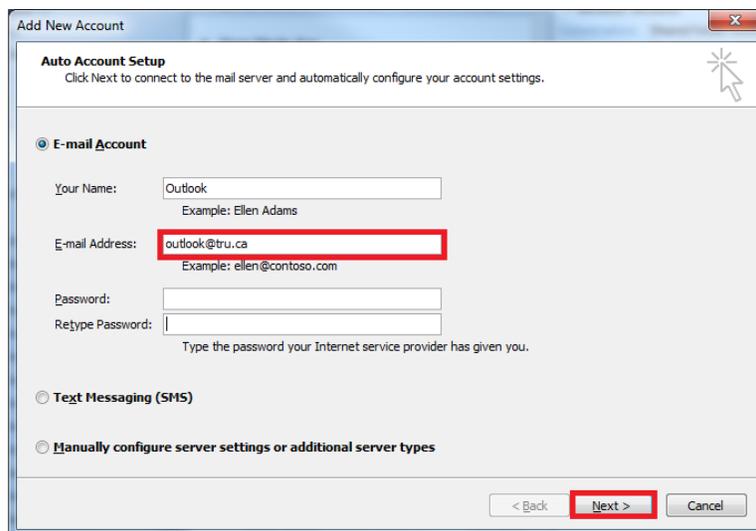
Please Read: http://www.tru.ca/__shared/assets/resharing_email_folder_calendar_contacts28384.pdf
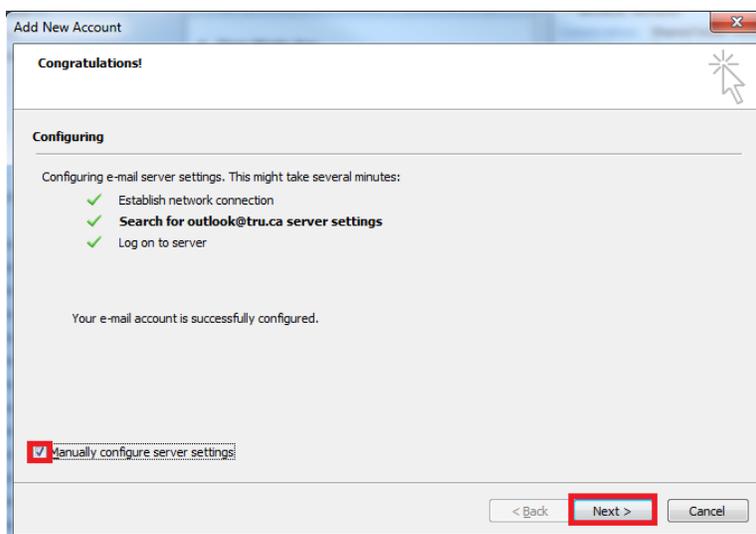
Receiving Delegate Access:

1. In the account that has been given delegate (A.K.A. Proxy) access, go to "File" – "Info" – "Add Account".


2. Enter the "E-mail Address" and click "Next".

3. Check "Manually configure server settings". Click "Next".

4.   If you want to turn off "Caching", uncheck "Use Cached Exchange Mode". Click "Finish".

Note: Caching will make a local copy on the machine (Caching is **Not** recommended for secure or sensitive data. The downside to turning off "caching" is, additional load is created on the Exchange Server.)
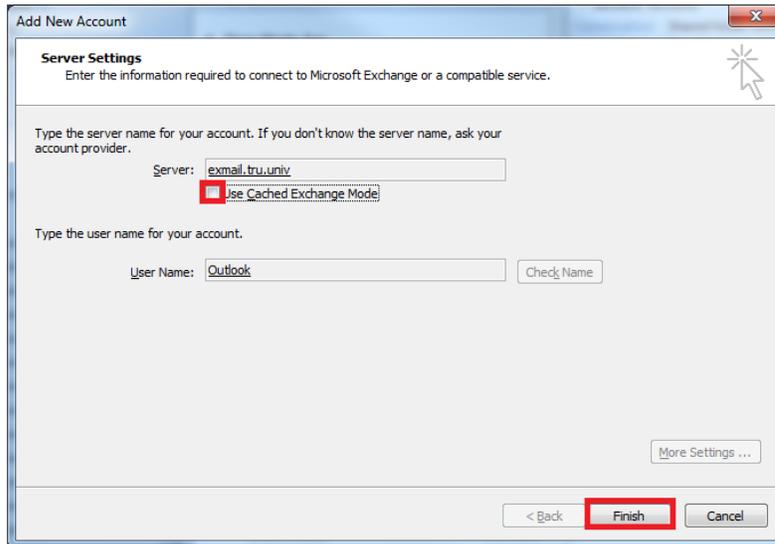
5.   In the account – Select "Mail" – Expand the account you just added.

Optional: You can add the "Inbox" etc. to your Favorites by right clicking (In Mail View Only) and selecting: "Show in Favorites".

The picture on the right shows the new "Favorite".