### **Outlook Delegate Access (aka Proxy)**

# **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".

# **TRU Outlook**

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Delegate	Permission	ns: wctest wctest			
This de	This delegate has the following permissions				
	<u>C</u> alendar	Editor (can read, create, and modify items) 🔹			
	✓ Delega	te receives copies of meeting-related messages sent to me			
2	<u>T</u> asks	Editor (can read, create, and modify items)			
	Inbox	None			
8=	Contacts	None			
	<u>N</u> otes	None			
	Journal	None			
Auton	Automatically send a message to delegate summarizing these permissions				
📃 Deleg	ate can see	my private items			
		OK Cancel			

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: <u>http://www.tru.ca/\_\_shared/assets/share\_shared\_mailbox28465.pdf</u>

Please Read: http://www.tru.ca/\_\_shared/assets/resharing\_email\_folder\_calendar\_contacts28384.pdf

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#### **Receiving Delegate Access:**

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

File	Home Se	end / Receiv	/e	Folder	View	Adobe PDF
🔣 Save A	s		Acc	ount	Inform	nation
ave as Adobe PDF			Account information			
👜 Save Attachments			wctest@tru.ca Microsoft Exchange			
Info			🕂 Ac	ld Accou	nt	

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

dd New Account Auto Account Setu Click Next to conr	p nect to the mail server and automatically configure your account settings.	×.
e-mail <u>A</u> ccount		
Your Name:	Outlook	
E-mail Address:	example: Ellen Adams outlook@tru.ca Example: ellen@contoso.com	
Password: Retype Password:	Type the password your Internet service provider has given you.	
Text Messaging (	(5M5)	
© <u>M</u> anually configu	re server settings or additional server types	
	< Back Next >	Cancel

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

Add New Account	X
Congratulations!	×
Configuring	
Configuring e-mail server settings. This might take several minutes: Establish network connection Search for outlook@tru.ca server settings Log on to server	
Your e-mail account is successfully configured.	
	Next > Cancel
	Carter

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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.)

Add New Account		X
Server Settings Enter the information re	uired to connect to Microsoft Exchange or a compatible service.	×.
Type the server name for you account provider.	r account. If you don't know the server name, ask your	
<u>S</u> erver:	exmail.tru.univ	
Type the user name for your a	iccount.	
<u>U</u> ser Name:	Outlook Check Name	2
		More Settings
	< <u>B</u> ack	Finish Cancel

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".

▲ Outlook@tru.	ca		Ignore 🗙	
Draf	Open in New <u>W</u> indow	New New	Clean Up - Delete	Rep
📄 Sent 📸	<u>N</u> ew Folder	L-mail Items	Delete	
	<u>R</u> ename Folder	Favorites		<
词 Han	<u>C</u> opy Folder	🔀 Inbox (1) - wctest@tru.ca		
🧓 Junk	Move Folder	📮 Unre	ad Mail (4)	
🔁 Outl 📮	Delete Folder	🔁 Sent	Items	
RSS 🔗	Mark All as Read	Dele	ted Items (1)	
Trair	Clean Up <u>F</u> older	Inbo	<b>x (61)</b> - Outlook@tru.ca	
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