

# Outlook Granting Folder Access

Academic Computing Services  
A Division of Information Services

[www.ku.edu/acs](http://www.ku.edu/acs)

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**Abstract:** This document provides information on how to grant other users permissions to your Outlook inbox and other folders.

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## Introduction

Learn how to give another person permission to access your Inbox and any other Outlook folder you want. Grant special permission to a person to manage the folders you specify (i.e., open your folders, create items, or respond to requests for you). The level of access you grant depends on the permissions role you assign. Granting access to information in one of your Outlook folders is much different than allowing someone to log on to your account because you control what they can access. This class is recommended for people who need access to a departmental account or another user's Outlook account.

## Objectives

In this course, participants learn the fundamentals of Granting Folder Access using Outlook 2002. Upon completion of this course the participants should be able to:

- Access another user's account based on the permissions that person has set for them
- Set permissions so that others can access your account

This handout is prepared with Outlook 2002; those using the Outlook 2000 client should refer to the Outlook: Granting Folder Access handout on the ACS Web site ([www.ku.edu/acs/docs](http://www.ku.edu/acs/docs)) for the appropriate steps to match. If you are interested in downloading the Outlook 2002 (for Windows) software visit [www.ku.edu/exchange/outlook](http://www.ku.edu/exchange/outlook).

## Prerequisites

You must have a KU Exchange account. It is assumed that the participants in this workshop have either taken the *Outlook: Email Basics* workshop or have equivalent skills.

## Related Training Available from ACS

All workshops offered by Academic Computing Services (ACS), a division of Information Services, are free to KU students, staff, faculty, and [approved affiliates](#).

To learn more about or register for workshops, receive automatic announcements of upcoming workshops, and track workshops you've registered for and have attended, visit the ACS Web site at [www.ku.edu/acs/train](http://www.ku.edu/acs/train). You can also check our online schedule at [www.ku.edu/acs/schedule](http://www.ku.edu/acs/schedule) for a list of class offerings and their availability. For further workshop related questions, please email [training@ku.edu](mailto:training@ku.edu).

## Definitions

Term	Definition
Information viewer	The section of an Outlook window displaying a specific type of item. Each folder has an Information viewer that displays information regarding that folder.
Delegate Access	The process of granting someone permission to open your folders, read and create items, and respond to requests for you.
Folder Permissions	If someone has shared one of their private folders with you or designated you as a delegate for that folder, then you have permission to perform certain activities in that folder.
Send-on-behalf-of	This permission level allows you to send messages on behalf of another user, by adding the <i>From:</i> field to a new message form.

## Granting Folder Access

As the person granting permission, you determine the level of access the delegate has. You can give a delegate permission to read items in your folders, or to read, create, modify, and delete items. You can give a delegate permission to send mail and to respond to mail on your behalf. The delegate can also organize meetings on your behalf and respond to meeting requests and task requests sent to you. If you grant someone access to your folders, that delegate has access to the personal items in the folders.

Delegate access only allows access permissions to the Calendar, Tasks, Inbox, Contacts, Notes and Journal folders. Shared folder permissions allows access to any Outlook folder in your message store.

## Providing Delegate Access to a folder

Granting access via the Delegates tab (**Tools** menu, **Options...**) gives another user the ability to only open the Inbox, Contacts, Calendar, Journal, Notes, and Tasks folders. When you give a person *any level* of delegate access to any of these six folders, that person is automatically granted permission to send messages on your behalf. If that person has permission to view your Calendar, that person can send out email with your name in the “from” field (or on your behalf). The delegate can also organize meetings on your behalf, respond to meeting and task requests sent to you, and view your private items.

Do not use the Delegates tab in either of the following situations:

- You want to grant a user permission to view folders but do not want to grant “Send on Behalf Of” permission.

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### Outlook: Granting Folder Access

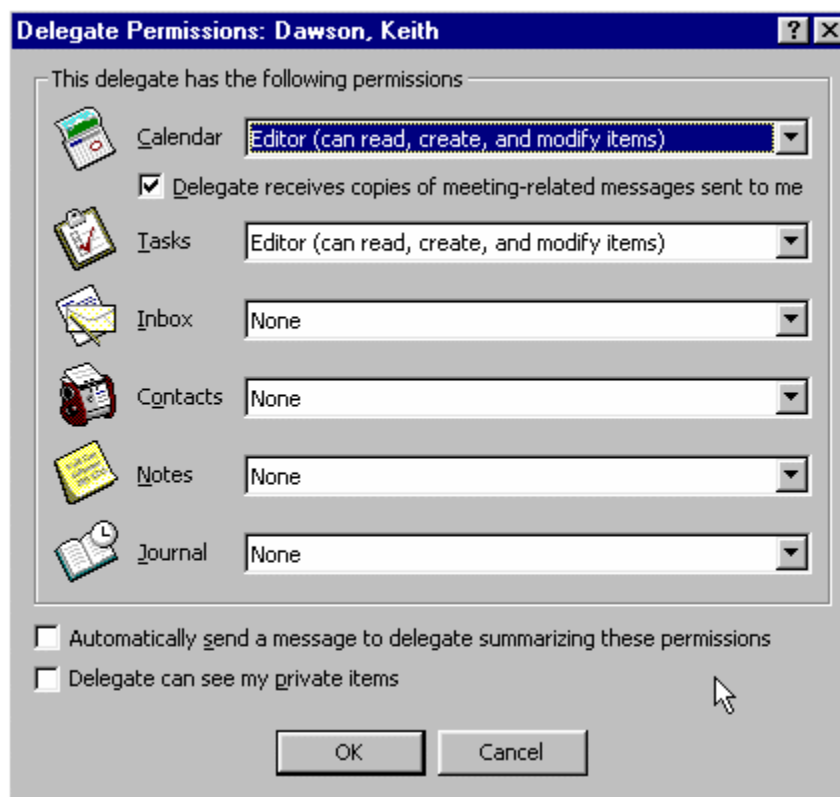
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- You want to give another user access to folders other than Calendar, Contacts, Inbox, Journal, Notes, or Tasks.

In either one of these cases, you need to handle access by granting permissions for individual folders. Refer to the section below on “*Granting permissions for individual folders*”.

To set permissions through the Delegate tab:

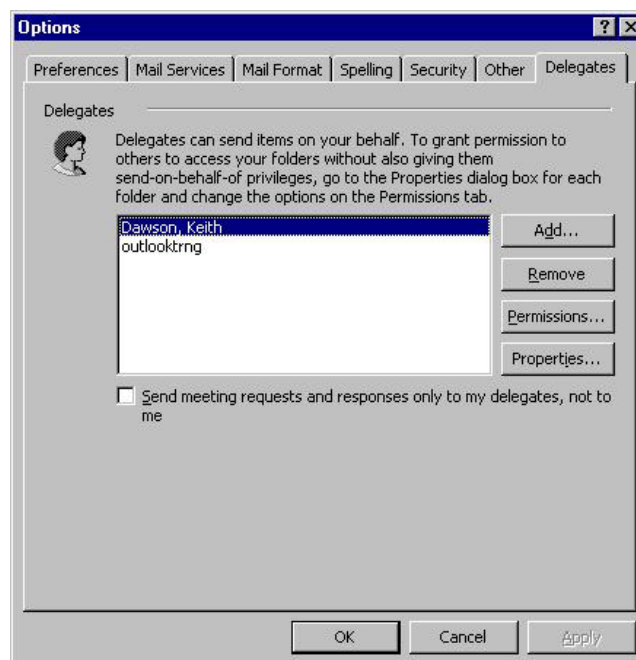
1. From the Main window, click the **Tools** menu and select **Options....** The Options dialog box appears.
2. Click the **Delegates** tab.
3. Click **Add...**
4. In the *Show Names from the:* field, *Global Address List* is the only option. Locate and select the name of the person you want to appoint as your delegate. (Only users on the Exchange Server can access your folders.)
5. Click **Add->** to place that person’s name in the *Add Users* field.
6. Repeat steps 4 & 5 for each user to whom you want to grant delegate access.
7. Click **OK**. The Delegate Permissions dialog box appears.



*Delegate Permission Dialog Box*

By default, the *Calendar* and *Tasks* folder permissions are set at *Editor* as well as the *Delegate receives copies of meeting-related messages sent to me* field is checked. If you do not want your delegate to receive copies of meeting requests and responses sent to you, uncheck this field.

8. For each of the Outlook folders listed on the dialog box you can choose to allow the delegate to have any of these permissions: *None*, *Reviewer*, *Author*, and *Editor*.
9. Click the drop-down list next to any folder and select the permission you want to give.
10. If you want Outlook to send a message to the delegate informing that person about the permissions you are giving them, check the **Automatically send a message to delegate summarizing these permissions** field.
11. If you have given the delegate permission to access any folder(s) that contains items you have marked as *Private*, check the **Delegate can see my private items** field if you want them to be able to access those private items. Otherwise, leave the box unchecked.
12. Click **OK** to close the Delegate Permissions dialog box. The Options dialog box reappears listing the delegate you added.



*Delegates tab on the Options dialog box*

13. If you gave Editor permission for your Calendar folder to a delegate and selected the *Delegate receives copies of meeting-related messages sent to me* field, then you can have all your meeting requests and responses sent to your delegate. To specify that meeting requests and responses that you receive are sent to the delegate, click the **Send meeting requests and responses only to my delegates, not to me** field. These types of messages do not appear in your Inbox.
14. Click **OK** to close the Options dialog box.

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**Note:** You can change a delegate's permissions at any time. Click the **Tools** menu and select **Options...**. Click the **Delegates** tab. Select the delegate for whom you want to change permissions. Click **Permissions...** to change what you allow them to access.

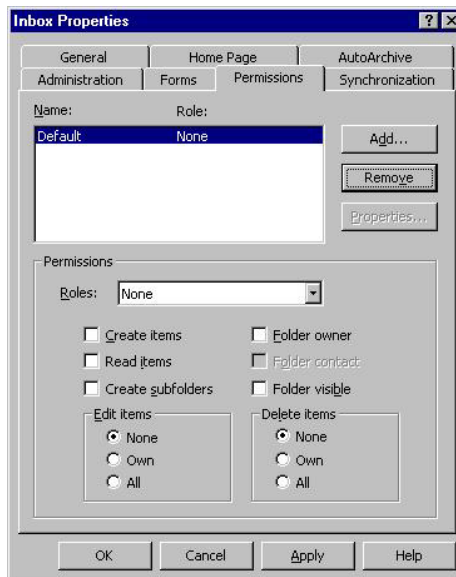
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## Granting permissions for individual folders

Access to one of your Exchange folders can be restricted to a single individual or a group of people. You can define specific permissions for each user.

Outlook does not provide the ability to send a notification to users with whom you have shared your folders as you can when setting delegate access. If you want them to know what permissions you have given them, you will have to let them know through email or some other method.

1. Right-click the folder for which you want to assign permissions and select **Properties** from the submenu. The Properties dialog box for that folder appears.
2. Click the **Permissions** tab.



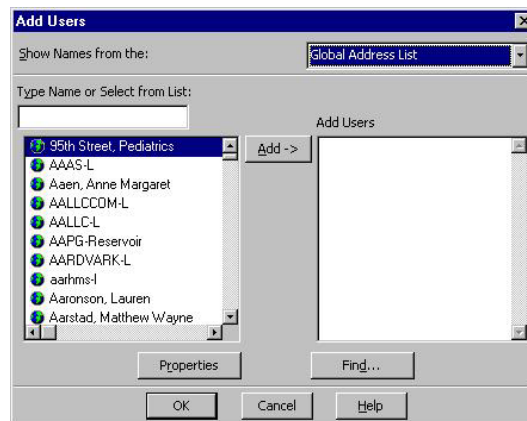
*Permissions tab on the folder's properties dialog box*

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**Note:** If you grant someone permissions on the Delegates tab, that person and the permissions you assigned them appear on the *Permissions* tab of the folder's properties.

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3. Click **Add...**. The Add Users dialog box appears.



*Add Users dialog box*

4. In the *Type Name or Select from List:* field, type the name of the person for whom you want to assign permissions.
5. Click **Add ->** to move the selected name in the *Add Users* field.
6. Click **OK**. The Properties dialog box reappears listing the name of the new person. By default, the *Permission Level* of the new name is set at *None*.
7. Select the new user. Either assign a *Permission Level:* to the new user or select the individual permissions you want that person to have.

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**Note:** The Permissions section of the dialog box shows permissions in two ways. The **Permission Level:** field shows permissions in terms of a predefined level. Below that are check boxes and option buttons that show the individual permissions associated with the level. Instead of assigning one of the predefined levels to a name, you can assign privileges one by one to that person by setting individual options in the tab's permissions area. If the resulting combination of privileges is the same as one of the predefined levels, Outlook assigns that level to the person.

- **Owner** – Create, read, modify, and delete all items and files; create subfolders; set permissions for other people to access the folder.
  - **Publishing Editor** – Create, read, modify, and delete all items and fields; create subfolders.
  - **Editor** – Create, read, modify, and delete all items and files. This level also grants you *send-on-behalf-of* permissions.
  - **Publishing Author** – Create and read items; modify and delete own items, create subfolders.
  - **Author** – Create, read, modify, and delete own items and files. This level also grants you *send-on-behalf-of* permissions.
  - **Non-editing Author** – Create and read items, delete own items
  - **Reviewer** – Read items.
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- **Contributor** – Create items and files. This allows users to drop items in a folder but not read them after they are dropped.
  - **Custom** – Any combination of permissions.
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8. Click **OK** to close the Properties dialog box.
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**Important:** It is important to know that if you are sharing a subfolder, you must give an individual rights to the top folder level. Using the same process as outlined above, choose the names in the Properties dialog box and set the level as “Folder visible”.

If a person whom you are giving folder permissions to wants to view your folder in their Folder List, you must give that individual rights to your mailbox at the Outlook Today level. This folder is in the Folder List named “Outlook Today – (Mailbox – User Name)”. Using the same process as outlined above section, “**Granting permissions for individual folders**”. Set the individual’s role permission as “Folder visible”, then that individual may open your folder in their folder view.

Also, new folders inherit the permissions of their parent folder. If you grant Reviewer permission for the top-level Mailbox folder, any new folder created beneath it will also have Reviewer permission. You should check or change the permissions of new folders you create to make sure that you have not inadvertently granted greater access than you intended.

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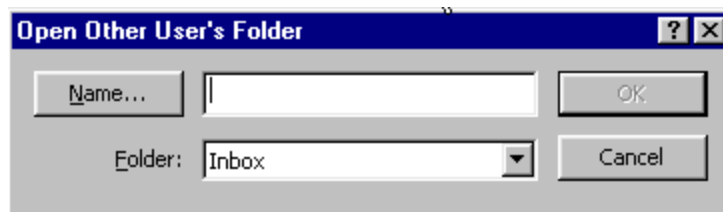
## **Accessing folders for which you have been given permissions**

After you have been granted access to someone else’s folder, you can open that person’s folders as well as your own. Outlook provides two methods for opening another user’s folders:

- Opening another Exchange user’s folder in a separate Outlook window.
- Adding another Exchange user’s mailbox to your Folder List.

### ***Opening another Exchange user’s folder in a separate window***

1. From the Main window, click the **File** menu, point onto **Open**, and select **Open User’s Folder...**. The Open Other User’s Folder dialog box appears.



*Other User's folder dialog box*

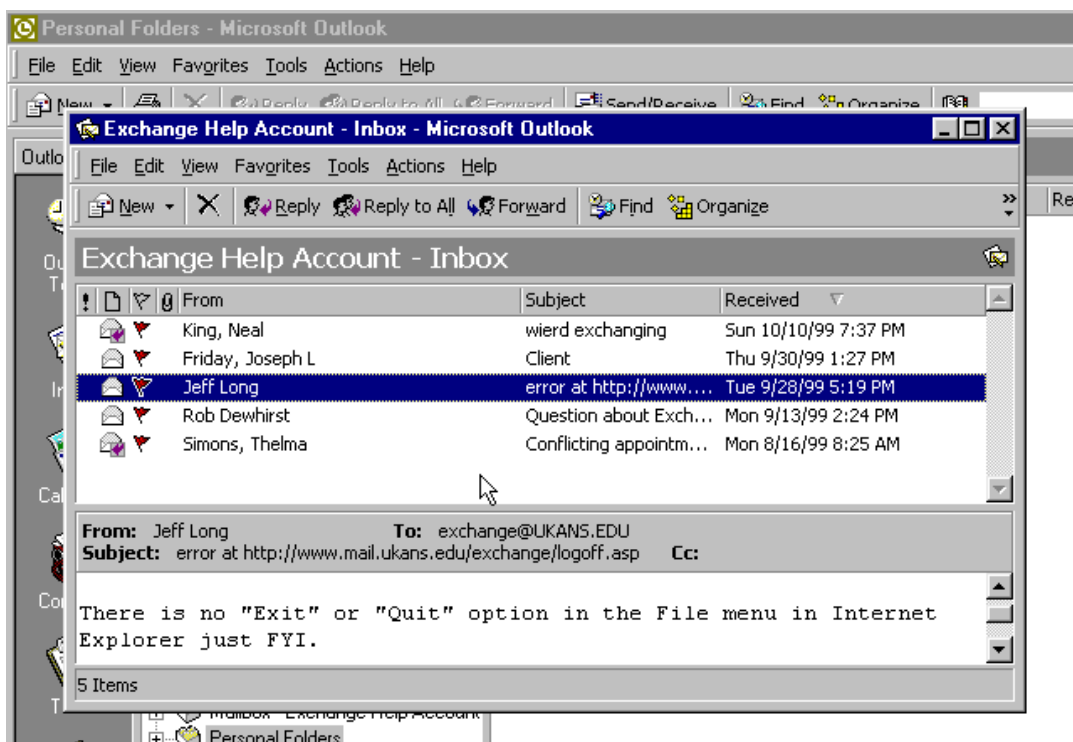
2. In the *Name...* field, type the name of the person to whom you have been given delegate access.

**Alternatively:** You can click **Name...** to select from the Global Address List.

3. In the **Folder:** field, click in the drop-down list and select the folder you want to open.

If you select a folder to which you have not been given permission to access, an “*Unable to display folder. Folder could not be found.*” message appears. If you select a folder for which you’ve been given permission to access, then that folder appears in a separate window superimposed over your Information viewer.

**Note:** The *Folder:* field is limited to the following folders: **Calendar, Contacts, Inbox, Journal, Notes, and Tasks**. If you have been given access to any other folder, you will need to view that folder through your Folder List. See the section below, “Adding another Exchanger user’s mailbox to your Folder List” for details.



*Viewing the other user's folder*

With that person's folder displayed, you can work with the items in that Information viewer the same way you work in your own Information viewer. You are limited only by the permissions granted to you in that folder.

When you are finished working in that person's folder, click the close button on that Information viewer (located at the top right corner of the window). The next time you click the **File** menu and select **Open**, you see a list of folders recently opened. You can choose from that folder list or select **Open User's Folder...** If you quit Outlook without closing the other user's folder, it will open automatically the next time you start Outlook.

## ***Adding another Exchange user's mailbox to your Folder List***

After one person has granted folder permissions to another, that person can then open the other users' Outlook folders in their own folder list view. To do this, you add the additional mailbox to your profile under services.

1. From the Main window, click the **Tools** menu and select **E-mail Accounts**. The E-mail Accounts dialog box appears.
2. Be sure that "*View or change existing e-mail accounts*" is the selected option and click **Next**.
3. Be sure that *Microsoft Exchange Server* is highlighted and click **Change**. The Exchange Server Settings dialog box appears.
4. Click **More Settings...**. The Microsoft Exchange Server Properties dialog box appears.
5. Click the **Advanced** tab.



6. Click **Add...**. The Add Mailbox dialog box appears.

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7. In the *Add mailbox:* field, type the name of the person whose mailbox you are adding or type their Exchange account name.
  8. Click **OK**.
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**Note:** You can list as many mailboxes as you need this way, so long as the owner has granted you access.

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9. Click **OK** to set the changes on the Microsoft Exchange Server dialog box.
10. Click **Next** on the Exchange Services settings dialog box.
11. Click **Finish** to close the E-mail Accounts dialog box.

The folders for the Exchange account you just added appear in your Folder List. They are denoted by “Mailbox – other user’s name”. Click the plus (+) sign to expand the list if necessary.

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**Important:** You can list as many mailboxes as you need this way, so long as the owner has granted you access.

It is important to know that you must give these individuals rights to your mailbox at the Outlook Today level. This folder is in the Folder List named “Outlook Today – (Mailbox – User Name)”. Using the same process as outlined above section, “*Granting permissions for individual folders*”. Set the individual’s permission level “None” with “Folder visible”, then that individual may open your folder in their folder view.

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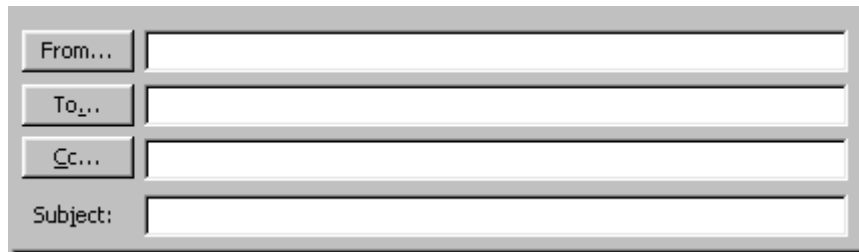
## Sending messages on behalf of another user

In order to send messages on another person’s behalf you must have been given delegate permissions via the Delegates tab (**Tools** menu > **Options**) to any folder or you must have author or editor permission on someone’s Inbox folder. This permission level allows you to send messages on behalf of another user, by adding the *From:* field to a new message form. Messages can be sent from your own Inbox, you do not have to open another user’s Inbox in order to create new mail messages. Messages “sent on behalf of” another user contain both your name and the other user’s name.

1. Open your Inbox.
  2. Click **New**.
  3. From the Message window’s menu bar, click the **View** menu and select **From Field**. The *From...* field is added to the message header above the *To...* field.
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**Note:** The *From...* field will remain visible on all subsequent email messages you create.

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4. In the *From...* field, type the name of the person for whom you are sending the message.

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**Alternatively:** You can click **From...** to display the Choose Sender dialog box and select the person from there.

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5. Complete the message and click **Send**.

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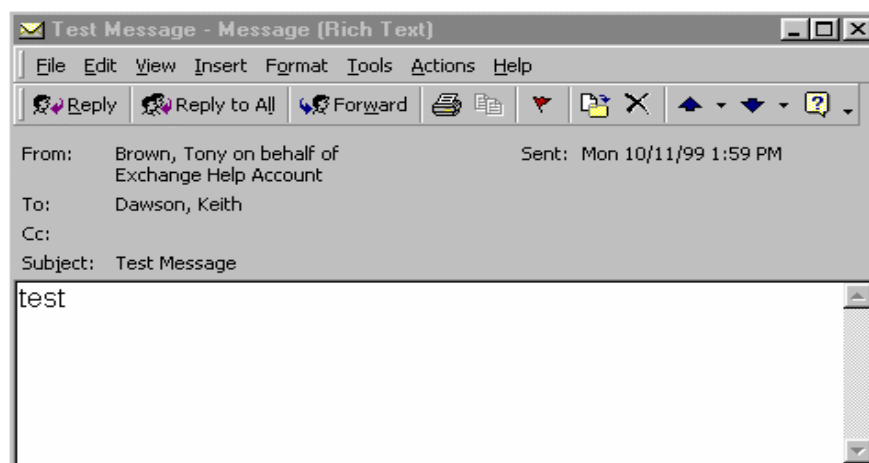
**Note:** If you attempt to send a message for someone who hasn't given you delegate permission, Exchange gives you an error message, saying "You do not have the permission to send the message on behalf of the specified user." The person that you tried to send the message to does not receive the message. The message window remains open allowing you to change the *From...* field before sending or delete the message.

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A copy of the message is stored in your Sent Items folder not in the other user's Sent Items folder.

## Receiving messages sent on behalf of someone else

When you receive messages that were "sent on behalf of" someone other than the actual sender, the message appears to be from the person on behalf of whom it was sent, not from the actual sender. When the message is opened, you will find the "on behalf of" information.



When you reply to a message that was "sent on behalf of" someone, the message is addressed to the "on behalf of" person not the actual sender. If you want the original sender to receive a copy of the reply, you will need to add them to the *To:*, *CC:* or *BCC:* field.

## Scheduling an appointment for another person

You must have delegate access, with author or editor permission, to carry out this procedure.

1. Open the other user's Calendar.
2. Click **New**.
3. Complete the information as needed for the appointment.
4. Click **Save and Close**.

## Scheduling a meeting on behalf of another person

1. Open the other user's Calendar.
2. Click the **File** menu, point on to **New**, and then click **Meeting Request**.
3. In the *To:* field, type the attendee(s) name.

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**Alternatively:** Click on the **Attendee Availability** tab to check the attendee's free/busy schedule.

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4. Complete the information as needed for the meeting.
5. Click **Send**.

When you reply to a meeting request that was sent on behalf of someone, the response is addressed to the "on behalf of" person not the actual sender. If you want the original sender to receive a copy of the response, you will need to add them to the *To:*, *CC:* or *BCC:* field.

## Deleting Delegates

To delete the permissions you have previously given for a user to access the folder do one of the following.

### From the Delegates tab:

1. From the Main window, click the **Tools** menu and select **Options...** The Options dialog box appears.
2. Click the **Delegates** tab.
3. Select the delegate you want to delete.
4. Click **Remove...** The list of delegates reflects the change.
5. Click **OK**.

### From the Folder's properties

1. Right-click the folder for which you want to change the permissions and select **Properties** from the submenu. The folder's Properties dialog box appears.
2. Click the **Permissions** tab.

3. Select that user's name and click **Remove**. Outlook immediately removes the user's name from the list of users.
  4. Click **OK**.
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**Remember:** If you are removing a user's permissions on a subfolder, you will want to check the permissions for any upper level folders that you may have granted that user permission to access.

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## **Additional Tips when working with other user's folders**

- To always have quick access to another user's folder that you use often, add shortcuts to that user's folder to your Outlook Bar. Right-click on the folder and select **Add to Outlook Bar**.
- If you manage the Calendars of several people, you can create a new group on the Outlook Bar and store shortcuts to their Calendars there. Right-click the Shortcut Bar and select **Add New Group**. Type a name for the group and press **[Enter]**. Add as many shortcuts to the new group as you want.

## **For More Information**

Here are some additional sources of information about Outlook and Exchange:

***KU's Exchange & Outlook Support*** – 864-0200

***Exchange Email Help*** – [exchange@ku.edu](mailto:exchange@ku.edu)

Email your questions, problems or concerns to the Exchange team.

***Website FAQs*** – [www.ku.edu/exchange/faqs.shtml](http://www.ku.edu/exchange/faqs.shtml)

Questions and information related to KU's Exchange project and using the Outlook client can be located at this Web site.

### ***Other Help Options -***

Like other Microsoft Office applications, Outlook has a Help menu and an Office Assistant that can be used to get online help. Selecting Help from the Help menu allows you to use the Office Assistant or the Outlook Help file to find the information you need. You can also use the What's This feature to find out about a part of the Outlook window or what a button or box does. All of the following features can be located under the Help menu on the toolbar.

*Using the Office Assistant* -- When you first start Outlook, the Office Assistant appears on your screen. You can choose any of the items listed in the Office Assistant balloon. You can also type a question and click Search. The Office Assistant provides a list of relevant topics. If you select a topic, the Office Assistant opens a window that provides detailed information about that topic. The Office Assistant can be hidden or closed.

*Using the on-line help* -- The Help window has two panes. The left pane allows you to select topics and the right pane shows information about the select topics. There are three tabs: Contents, Answer Wizard, and Index. The Contents tab allows you to select general areas of information, the Answer Wizard tab allows you to ask a question in your own words, and the Index tab provides an alphabetical list of major help topics.

*What's This?* -- When you select this option from the Help menu, a question mark is added to the pointer. Using this question mark pointer, you can point onto any menu item and click to get information about that item, or point onto any region of an Information viewer or form and click to get information about that region.

*Office on the Web* -- Outlook opens Internet Explorer and opens a Web site with information about Office 2000 applications.

## **Getting Additional Help**

Academic Computing Services provides consulting and Q&A help in a variety of ways:

785/864-0200

[question@ku.edu](mailto:question@ku.edu)

[www.ku.edu/acs/help](http://www.ku.edu/acs/help)

*Last Update: 03/08/2004*