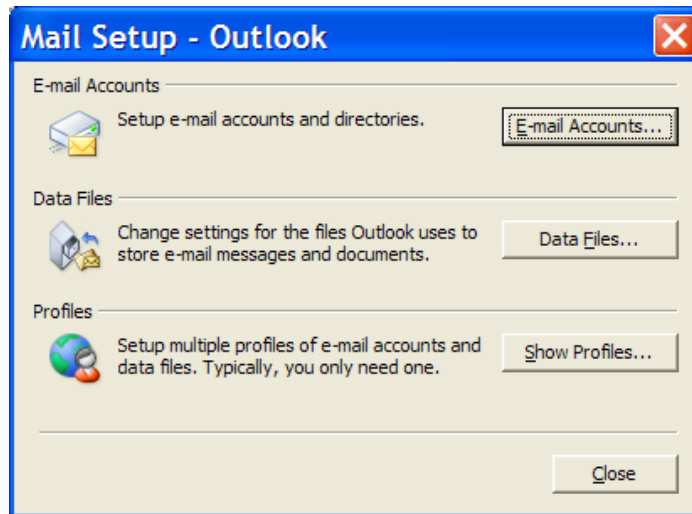


## Departmental/Service Email Account – Calendar and Delegation Configuration

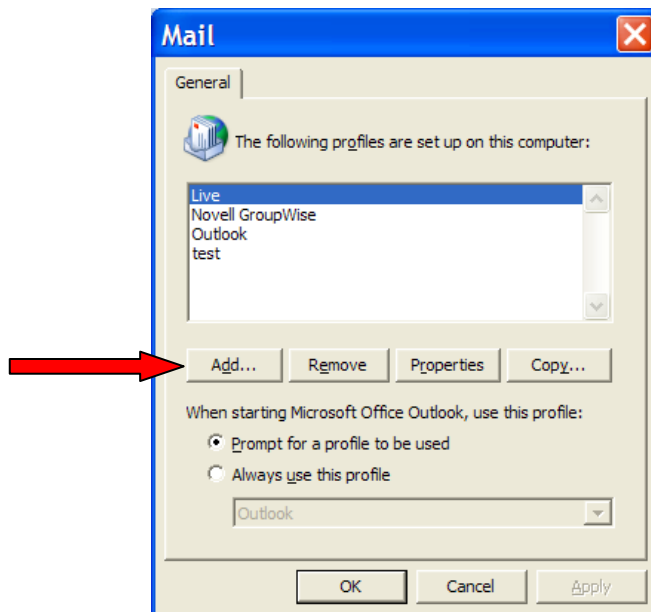
*It is recommended that only the “owner” of the account follow these steps.*

You must use Outlook 2007 in order to configure delegation rights and to share calendars with others. Please follow the steps below to configure Outlook to open multiple “profiles” (yours and your departmental or service email account).

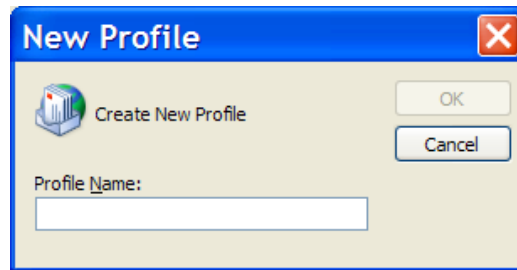
1. Go to Start > Control Panel > click on the Mail icon to open.
2. Click on Show Profiles...



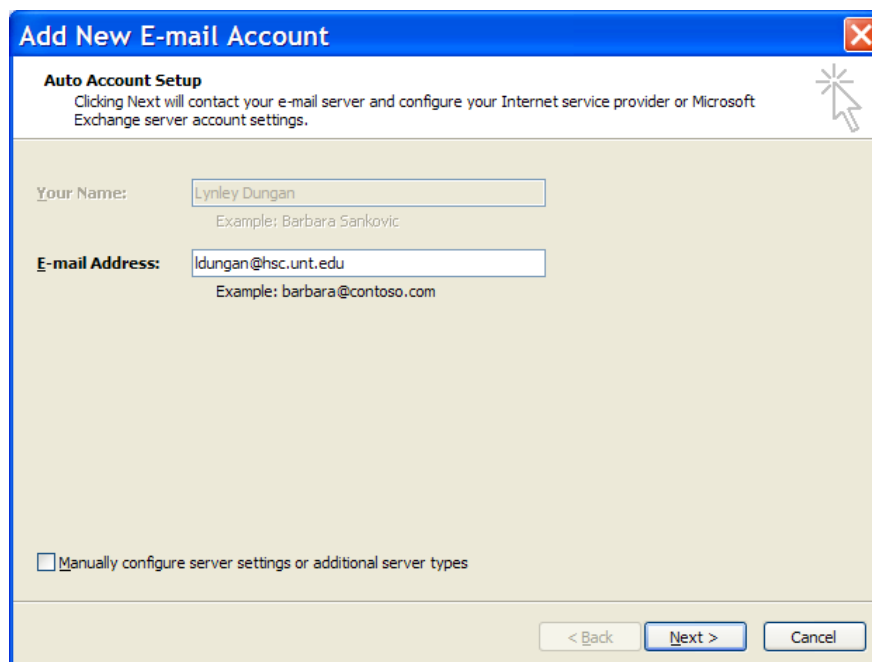
3. Click Add...



4. Type a name for the Profile, usually the departmental account name (i.e. Student Helpdesk), and click *OK*.



5. The *Add New E-mail Account Window* will auto-fill with a previously used email address. Remove the email address, and then fill in the additional fields as required.



**Add New E-mail Account**

**Auto Account Setup**  
Clicking Next will contact your e-mail server and configure your Internet service provider or Microsoft Exchange server account settings.

**Your Name:**   
Example: Barbara Sankovic

**E-mail Address:**   
Example: barbara@contoso.com

**Password:**

**Retype Password:**   
Type the password your Internet service provider has given you.

Manually configure server settings or additional server types

< Back   Next >   Cancel

Remove name and enter the name of your departmental account, i.e. HSC Student Helpdesk

**Add New E-mail Account**

**Auto Account Setup**  
Clicking Next will contact your e-mail server and configure your Internet service provider or Microsoft Exchange server account settings.

**Your Name:**   
Example: Barbara Sankovic

**E-mail Address:**   
Example: barbara@contoso.com

**Password:**

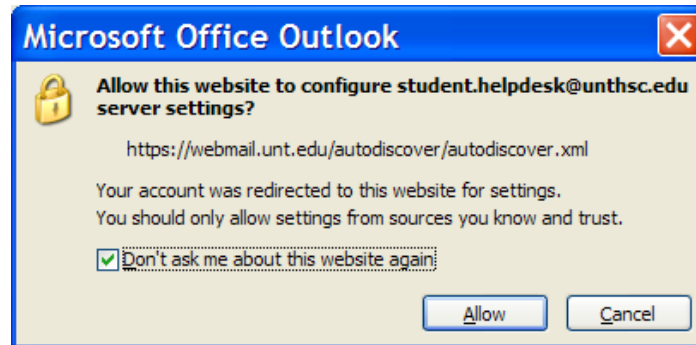
**Retype Password:**   
Type the password your Internet service provider has given you.

Manually configure server settings or additional server types

< Back   **Next >**   Cancel

6. Click *Next*.

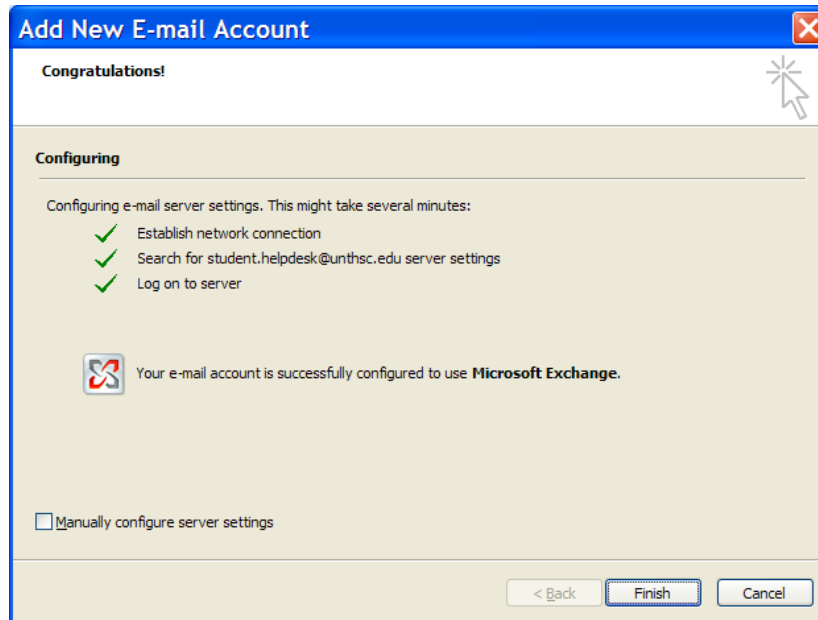
7. Check the box next to *Don't ask me about this website again* and click *Allow*.



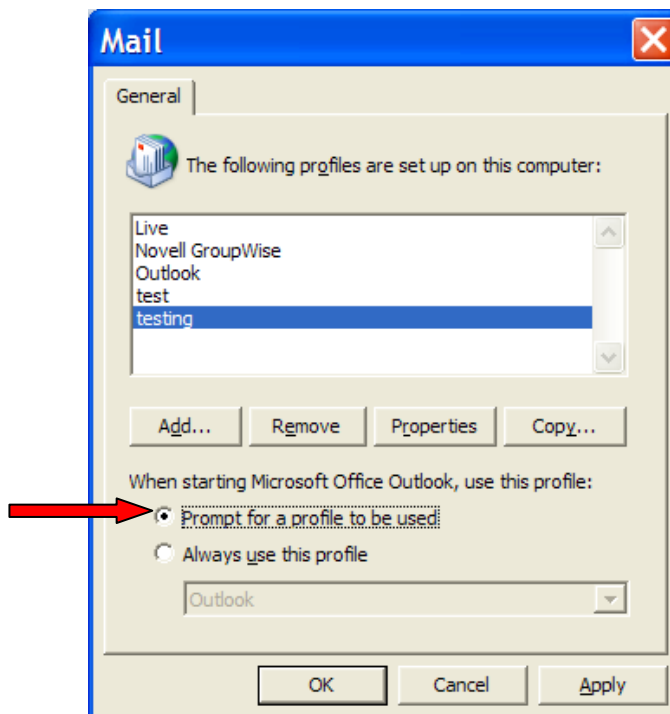
8. Remove the previous log in and enter unthsc\departmentalname (i.e. unthsc\student.helpdesk). Enter password (given to you by the Accounts Administrator).



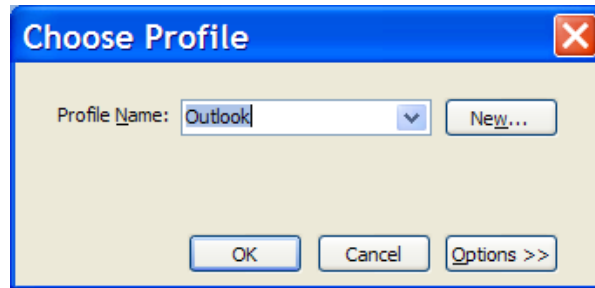
9. Click *Finish*.



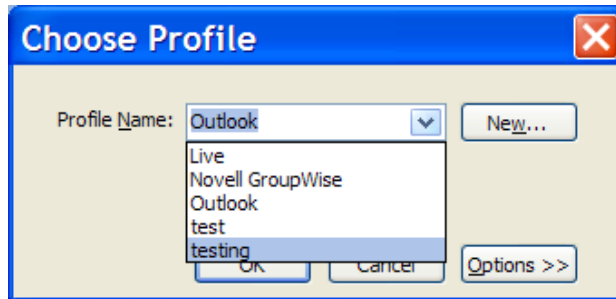
10. In Mail (from the Control Panel), choose *Prompt for a profile to be used*.



11. Close out of Mail and the Control Panel. Launch Outlook 2007. Outlook will now prompt you to choose the Profile/Account that you wish to log into.



12. Drop down the list and select the Profile for the departmental account you wish to log into.



13. Log in to this account with unthsc\departmentalname and the password.
14. Once logged in, follow the instructions for setting up delegation and/or sharing calendars below.
15. After delegation and sharing is configured, you may wish to go back to Control Panel > Mail and choose *Always use this profile* and specify your own personal profile. Configuring it in this manner means that you will no longer need to select a profile each time you launch Outlook.

## About Delegate Access

Two Microsoft Office Outlook 2007 users who both use an Exchange account in the same organization can share their Exchange folders with each other. Folder sharing is one of the collaborative features of Exchange. When you grant access to your Outlook folders to another Outlook user, you can control whether the delegate has read-only or more advanced permissions. By default, items that you mark as private cannot be accessed by anyone else.

**IMPORTANT** You should not rely on the Private feature to prevent other people from accessing the details of your appointments, contacts, or tasks through programmatic methods or by using other e-mail programs.

Delegate Access is a more advanced feature than just sharing your Outlook folders. If you want to grant additional permissions, such as allowing a delegate the ability to create e-mail messages or respond to meeting requests on your behalf, you must use Delegate Access.

### NOTES

As the manager, your mail must be delivered to your mailbox on the Exchange server, not to a **Personal Folders file (.pst)** on your computer.

You and the delegate must use the same version of Office Outlook.

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** box. Recipients of the e-mail message will see the text ***Delegate Name on behalf of Manager Name*** next to **From**.

## Turn on Delegate Access

A delegate automatically receives Send on Behalf permissions. This means your delegate can do the following:

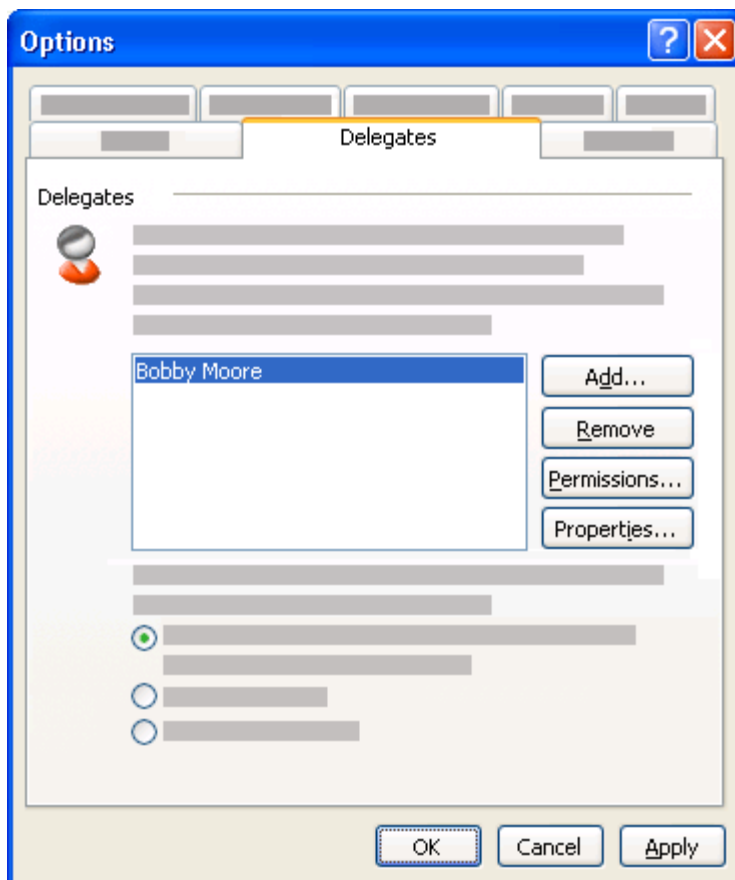
Respond to a meeting request sent to you, the manager.

Receive meeting request responses sent to you, the manager.

Compose and send an e-mail message that, when received, will have ***Delegate Name on behalf of Manager Name*** next to **From**.

By default, the delegate can read only the meeting requests and responses sent to the manager. The delegate does not have access to read any other messages in your **Inbox**.

1. On the **Tools** menu, click **Options**.
2. Click the **Delegates** tab, and then click **Add**.



⊕ If the **Delegates** tab or the **Add** button is missing



- An active connection does not exist between Outlook and Exchange. The Outlook status bar should display **Connected to Microsoft Exchange** or **Online**.
- Your messages aren't being delivered to your Exchange mailbox. Your e-mail must be delivered to your Exchange mailbox, not to a Personal Folders file (.pst) on your hard disk.
- The add-in that contains the Delegate Access feature might not be installed or turned on.
  1. On the **Tools** menu, click **Trust Center**, and then click **Add-ins**.
  2. In the **Manage** list, click **Exchange Client Extensions**, and then click **Go**.
  3. In the **Add-In Manager** dialog box, select the **Delegate Access** check box.

If **Delegate Access** is not listed, you must install the add-in.

1. In the **Add-In Manager** dialog box, click **Install**.
2. Select **dlgsetp.ecf**, and then click **Open**.
3. Click **OK** to close the **Add-In Manager** dialog box.

We recommend that you restart Outlook.

3. Type the name of the person whom you want to designate as your delegate, or search for and then click the name in the search results list.

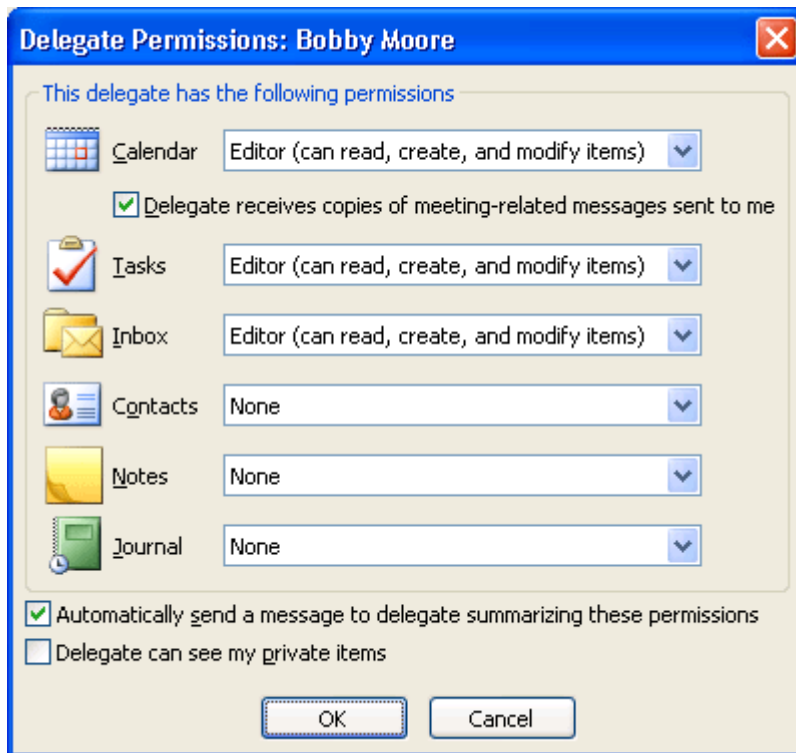
**NOTE** The delegate must be a person in the Exchange **Global Address List**.

4. Click **Add**, and then click **OK**.
5. In the **Delegate Permissions** dialog box, you can accept the default permission settings or select custom access levels for Exchange folders.

If a delegate needs permission to work with meeting requests and responses only, the default permission settings, including **Delegate receives copies of meeting-related messages sent to me**, is sufficient. You can leave the **Inbox** permission setting at **None**. Meeting requests and responses will go directly to the delegate's **Inbox**.

**NOTE** By default, the delegate is granted **Editor (can read, create, and modify items)** permission to your **Calendar** folder, because after the delegate responds to the meeting on your behalf, the meeting is automatically added to your **Calendar** folder.

- **Reviewer** With this permission, the delegate can read items in the manager's folder.
- **Author** With this permission, the delegate can read and create items, and modify and delete items that you create. For example, a delegate can create task requests and meeting requests directly in the manager's **Task** or **Calendar** folder and then send the item on the manager's behalf.
- **Editor** With this permission, the delegate can do everything that an Author has permission to do and additionally can modify and delete the items that the manager created.



6. To send a message to notify the delegate of the changed permissions, select the **Automatically send a message to delegate summarizing these permissions** check box.
7. If you want, select the **Delegate can see my private items** check box.

**IMPORTANT** This is a global setting that affects all of your Exchange folders, including all Mail, Contacts, Calendar, Tasks, Notes, and Journal folders. You cannot allow access to private items in only one folder.

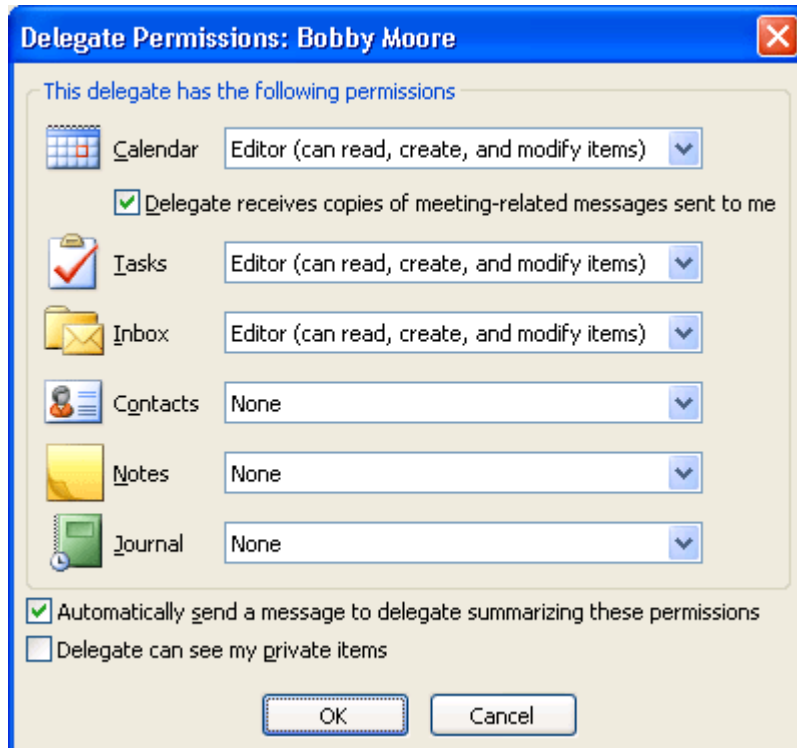
8. Click **OK**.

**NOTE** Messages sent with Send on Behalf permissions include both the delegate's and manager's names next to **From**. When a message is sent with Send As permissions, only the manager's name appears.

## Change permissions for your delegate

1. On the **Tools** menu, click **Options**, and then click the **Delegates** tab.
2. Click the name of the delegate for whom you want to change permissions, and then click **Permissions**.

**NOTE** If you want to remove all Delegate Access permissions, click **Remove** and skip the remainder of these steps.



3. Change the permissions for any Outlook folder that the delegate has access to.
4. To send a message to notify the delegate of the changed permissions, select the **Automatically send a message to delegate summarizing these permissions** check box.

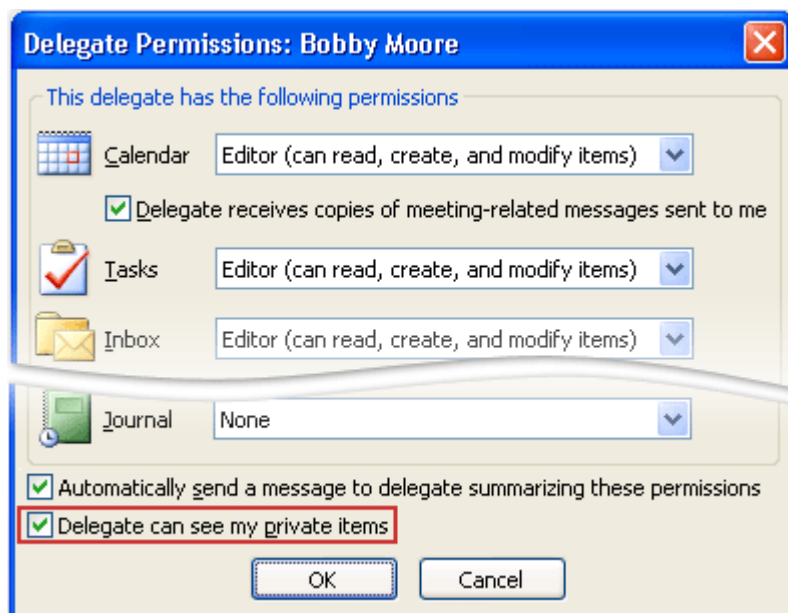
**NOTE** If you want copies of meeting requests and responses that you receive to be sent to a delegate, make sure the delegate is assigned **Editor (can read, create, and modify items)** permission to your **Calendar** folder, and then select the **Delegate receives copies of meeting-related messages sent to me** check box.

## Choose items that can't be viewed by a delegate

If you have given permissions to a delegate so that he or she can access your Outlook folders, you can hide personal information in appointments, meetings, tasks, and contacts. Open each personal item, and in the **Options** group, click **Private**.

If you want a delegate to see your private items, do the following:

1. On the **Tools** menu, click **Options**, and then click the **Delegates** tab.
  - An active connection does not exist between Outlook and Exchange. The Outlook status bar should display **Connected to Microsoft Exchange** or **Online**.
2. In the list, click the name of the delegate to whom you want to give permission to see your private appointments.
3. Click **Permissions**.
4. Select the **Delegate can see my private items** check box.



**IMPORTANT** You should not rely on the Private feature to prevent other people from accessing the details of your appointments, contacts, or tasks. To make sure that other people cannot read the items that you marked as private, do not grant them **Reviewer (can read items)** permission to your **Calendar**, **Contacts**, or **Tasks** folder. A person who is granted **Reviewer (can read items)** permission to access your folders could use programmatic methods or

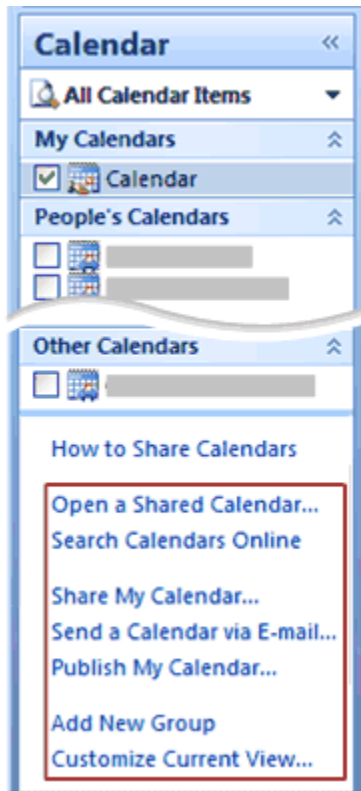
other e-mail programs to view the details of a private item. Use the Private feature only when you share folders with people whom you trust.

#### **Descriptions of delegate permission levels**

- **Reviewer** With this permission, the delegate can read items in the manager's folder.
  
- **Author** With this permission, the delegate can read and create items, and modify and delete items that you create. For example, a delegate can create task requests and meeting requests directly in the manager's **Task** or **Calendar** folder and then send the item on the manager's behalf.
  
- **Editor** With this permission, the delegate can do everything that an Author has permission to do and additionally can modify and delete the items that the manager created.

## Calendar Sharing

### Share calendar information quickly with Navigation Pane links



You can share calendar information with other people by using Microsoft Office Outlook 2007 in many ways.

In Calendar, in the **Navigation Pane** (**Navigation Pane**: The column on the left side of the Outlook window that includes panes such as Shortcuts or Mail and the shortcuts or folders within each pane. Click a folder to show the items in the folder.), there are several links to help you quickly get started with calendar sharing.

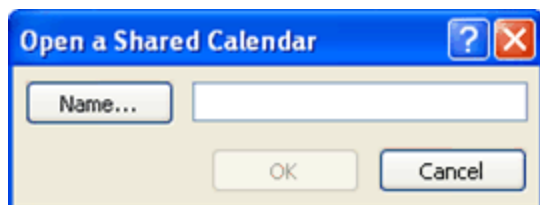
This article describes the ways to share calendar information by using the links in the Calendar Navigation Pane.

The links you see will vary, depending upon the accounts you have configured in your Outlook profile. For example, this illustration is what a person with a Microsoft Exchange account would see.

### Open a shared Exchange Calendar

You can quickly view another person's shared default Exchange Calendar from the **Navigation Pane** (**Navigation Pane**: The column on the left side of the Outlook window that includes panes such as Shortcuts or Mail and the shortcuts or folders within each pane. Click a folder to show the items in the folder.).

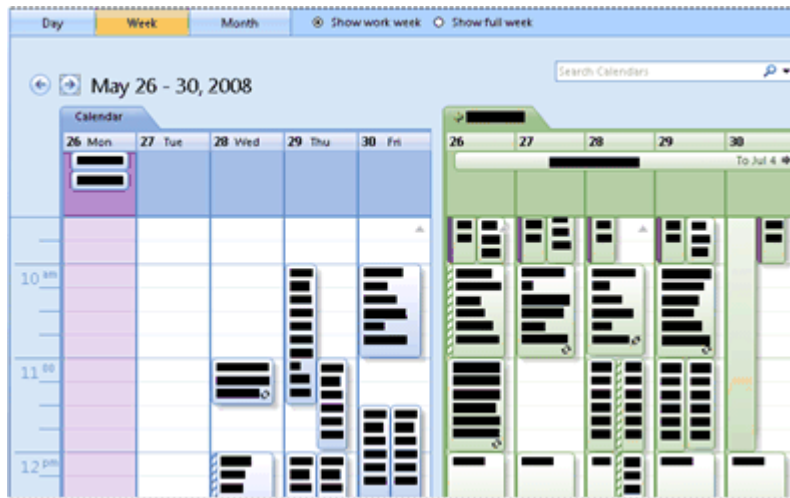
1. In **Calendar**, click **Open a Shared Calendar**.



2. Type a name in the **Name** box, or click **Name** to select a name from the Address Book.

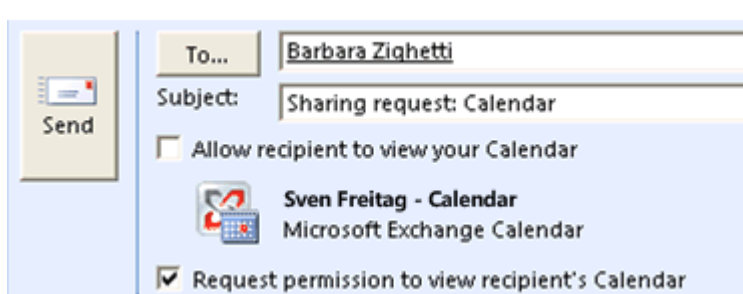
3. Click **OK**.

The shared Calendar appears next to any calendar that is already in the view.



After you access a shared Calendar for the first time, the Calendar is added to the Navigation Pane. The next time you want to view the shared Calendar, you can click it in the Navigation Pane.

If the other person whose Calendar you want to open has not granted you permission to view it, Outlook prompts you to ask the person for the permission you need. If you click **Yes**, a sharing request e-mail message opens automatically. The message requests the person to share his or her Calendar with you and also provides the option to share your default Calendar with him or her.



**TIP** You can quickly schedule a meeting with people whose calendars you can view. On the **Actions** menu, point to **New Meeting Request With**, and then click **All** or the names that you want from the list.

#### **NOTES**

You can open only the default Calendar. Even if a person has created an additional calendar, you can open only the default Calendar.

To remove a calendar from the **Other Calendars** list, right-click the calendar, and then click **Remove from Other Calendars**.

The owner of the calendar items controls who can view the items and change them.

You can view up to 30 calendars in side-by-side mode in Calendar view. However, custom view settings on your calendar may not be displayed correctly if you use this mode. To ensure that your custom view settings are displayed, right-click any calendar in the list of shared calendars, and then click **Open** on the shortcut menu. The calendar will open, and any other open calendars will close. The view settings for the selected calendar will be in effect for the current calendar and for any additional calendars that you view subsequently in side-by-side mode.

## Search Calendars Online

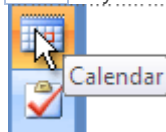
You can search Microsoft Office Online for Internet Calendars that you can view and subscribe to in Office Outlook 2007.

## Share your Calendar with other Exchange users

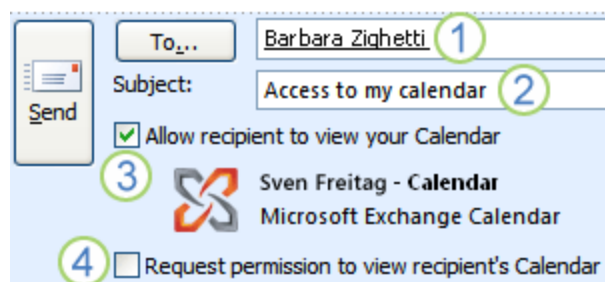
When you use an Exchange account, you can share your Exchange Calendar. The recipient receives an e-mail notification that you have shared your Calendar. Also, you can request that the recipient share his or her Exchange Calendar with you.

1. In **Calendar**, in the **Navigation Pane**, click **Share My Calendar**.

**NOTE** If you are using the **Navigation Pane** in **Minimized** view, in the **Navigation Pane**, click



....., click **Navigation Pane**, and then click **Share My Calendar**.





- 1 Enter the name of the person to whom you want to grant access to view your Calendar.
  - 2 Type a subject for your e-mail message.
  - 3 Select this check box to grant the recipient permission to view your Calendar.
  - 4 Select this check box to ask the recipient to share his or her Calendar with you. This is optional.
- 

2. In the **To** box, enter the name of the recipient for the sharing invitation message.
3. In the **Subject** box, type a subject for the e-mail message.
4. You can request permissions to view the recipient's default Calendar. To do so, select the **Request permission to view recipient's Calendar** check box.

**NOTE** If you want to request access to a calendar other than the default Calendar, you must send an e-mail message asking for permissions to that particular calendar. This option requests access to the recipient's default Calendar only.

5. In the message body, type any information that you want to include.
6. Click **Send**.
7. Review the confirmation dialog box, and then, if it is correct, click **OK**.

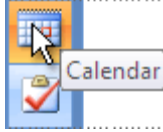
## Send calendars in e-mail messages

You can send any of the calendars that you own to another person in an e-mail message. This is a type of Internet Calendar called a Calendar Snapshot. The calendar appears within the body of an e-mail message. However, an Office Outlook 2007 user who receives the Calendar Snapshot can choose to open the calendar as an Outlook calendar. Doing so can display the Calendar Snapshot and the current calendar in side-by-side mode or calendar overlay mode.

Recipients of Calendar Snapshots do not receive the changes that you make to your calendar unless you send them a new Calendar Snapshot. For calendars that need to be updated, consider using Exchange calendar sharing, [publishing your calendar to Microsoft Office Online](#), or using a [Web server that supports calendar publishing](#).

1. In **Calendar**, in the **Navigation Pane**, click **Send Calendar via E-mail**.

**NOTE** If you are using the **Navigation Pane** in **Minimized** view, in the **Navigation Pane**, click



....., click **Navigation Pane**, right-click the calendar that you want to share, and then click **Send Calendar via E-mail**.

2. In the **To** box, enter the name of the person to whom you want to send the subscription information.
3. From the **Calendar** list, choose the calendar to send. By default, your default Calendar is selected. This is the Outlook calendar that is used to display your free/busy information to others and where meeting requests are accepted.
4. From the **Date Range** list, choose the amount of calendar data to include in your e-mail message, or click **Specify dates** to enter a custom date range.

**TIP** If you choose a large date range or click **Whole calendar**, you might create a large e-mail message.

5. In the **Detail** list, choose the amount of detail to show the recipients. By default, the **Availability only** option is selected. None of the options include your items that are marked private — unless you change the privacy option in **Advanced** options.
6. Optionally, you can restrict the information that is included in the e-mail message to your working hours by selecting the **Only show time within my working hours** check box. To change your working hours, click **Set working hours**.
7. Optionally, click **Show** to see the following **Advanced** options:
  - **Include details of items marked private** This option requires **Detail** to be set to **Limited Details** or **Full Details**. The existence of private items will be included, but no further information will be shared.
  - **Include attachments within calendar items** This option requires **Detail** to be set to **Full Details**. All attachments on calendar items, such as spreadsheets, are included.

**NOTE** This might increase the size of the e-mail message significantly.

- **E-mail Layout** You can click **Daily schedule** or **List of events** to include your schedule or a list of events.
8. Optionally, you can request permissions to view the recipient's default calendar. To do so, select the **Request permission to view recipient's Calendar** check box.

**NOTE** If you want access to an additional calendar that the recipient has created, for example, a personal calendar, you must send an e-mail message asking for permissions to that particular calendar. This option requests access only to the recipient's default calendar.

9. Click **Send**.
10. Review the confirmation dialog box, and then, if it is correct, click **OK**.

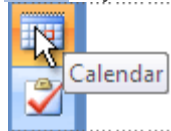
If your calendar contains no items, a dialog box appears to provide you the option to cancel the e-mail message.

## Add a new calendar group

By default, in the Navigation Pane, Office Outlook 2007 organizes your calendars into three groups — **My Calendars**, **People's Calendars**, and **Other Calendars**. You can rename these groups or create additional calendar groups to organize your calendars in a way that fits your work style better.

1. In **Calendar**, in the **Navigation Pane**, click **Add New Group**.

**NOTE** If you are using the **Navigation Pane** in **Minimized** view, in the **Navigation Pane**, click



....., click **Navigation Pane**, and then click **Add New Group**.

2. Type a name for the new calendar group, and then press ENTER.

You can click and drag any of the calendars in the Navigation Pane to the new calendar group. Release the mouse button over the name of the calendar group.