**Outlook 2000 Mail Rules and Access Rights**
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Version

1

# MAIL RULES AND ACCESS RIGHTS

# Outlook 2000

Ministry of Education
Headquarters Lusaka, Zambia

# Introduction

This in-house course has been developed to increase your knowledge of popular applications software and to provide you with the skills to accomplish your day-to-day work activities more efficiently. The design of the course is based on the assumption that you have completed the course prerequisites.

This manual has been compiled to support and to enhance the instructor's lecture during class as well as to serve as your personal reference when you return to your office.

# Manual Conventions

Throughout this manual reference is made to various components of the software. Command buttons, menus, and menu options appear in boldface type, for example, **OK** and **File**. Keystrokes appear in boldface italic type, for example, ***Ctrl + V*** and ***Enter***. When possible, the words *select* and *choose* have been used in this manual to allow you the option of using either the mouse or keyboard.

For your assistance, ample space along the left margin has been provided to allow room for notes relevant to the topic discussed. We also include notes of importance (), mouse-based shortcuts (), keyboard shortcuts (), cautionary notes (), and work notes ().

# Course Objectives

*After this course, you will have the skills necessary to:*

- ✓ *Define, create, and modify rules.*
- ✓ *Create an "out of office" or leave rule.*
- ✓ *Grant permissions to others to access your Outlook folders.*
- ✓ *Use granted permissions to proxy to another's Outlook folders.*

# Table of Contents

**CREATING RULES** .......... **1**

DEFINING RULES .......... 2
CREATING A RULE WITH ORGANIZE .......... 3
*How To Organize Mail* .......... *4*
USING THE RULES WIZARD .......... 5
*What the Rules Wizard Can Do* .......... *5*
*What the Rules Wizard Cannot Do* .......... *5*
CREATING A RULE WITH THE RULES WIZARD .......... 6
*Part 1: How to Set the Type of Rule* .......... *7*
*Part 2: How to Set Conditions for Rules* .......... *9*
*Part 3: How to Specify an Action for a Rule* .......... *10*
*Part 4: How to Set Exceptions to the Rule* .......... *11*
*Part 5: How to Name a Rule* .......... *12*
COPYING RULES .......... 14
*How to Copy a Rule* .......... *14*
MODIFYING RULES .......... 15
*How to Modify a Rule* .......... *15*
RENAMING RULES .......... 16
*How to Rename a Rule* .......... *16*
CHANGING THE ORDER OF RULES .......... 17
*How to Change the Order in Which Rules are Executed* .......... *17*
TURNING RULES OFF AND ON .......... 18
*How to Turn a Rule Off* .......... *18*
*How to Turn a Rule On* .......... *18*
DELETING RULES .......... 19
*How to Delete a Rule* .......... *19*
CREATING AN OUT OF OFFICE RULE .......... 20
*What the Out of Office Assistant Can Do* .......... *20*
*What the Out of Office Assistant Cannot Do* .......... *20*
*How to Create an "Out of Office" Message* .......... *22*
ADDING EXCEPTIONS TO THE OUT OF OFFICE ASSISTANT .......... 23
*How to Add an Exception to the Out of Office Assistant* .......... *25*
TURNING OFF THE OUT OF OFFICE ASSISTANT .......... 27
*How to Turn Off the Out of Office Notification* .......... *27*

**GRANTING ACCESS RIGHTS TO OTHERS** .......... **29**

COMPARING AND CONTRASTING DELEGATES AND PERMISSIONS .......... 30
GRANTING DELEGATE RIGHTS .......... 31
*How to Grant Delegate Rights* .......... *32*
GRANTING PERMISSIONS .......... 34
*How to Grant Permissions to a Folder* .......... *36*
*How to Edit Permissions* .......... *37*
*How to Remove Someone From the Permissions List* .......... *38*

VIEWING ANOTHER'S DELEGATED OR PERMISSIONS GRANTED MAILBOX ................................ 39
*How to View Another's Mailbox* .......... *39*
*How to Display Another's Mailbox on Your Folder List* .......... *40*
SENDING MAIL ON BEHALF OF ANOTHER .......... 42
*Points on Sending Mail on Behalf of Another* .......... *42*
*How to Send Mail on Behalf of Another* .......... *42*
INDEX .......... 43

Lesson

1

# Creating Rules

*In this lesson, you will learn the skills necessary to:*

- ✓ *Define and identify types of rules.*
- ✓ *Create and modify rules.*
- ✓ *Copy, rename, and delete rules.*
- ✓ *Change the order of rules.*
- ✓ *Create "out of office" or leave rules.*

# Defining Rules

Rules allow you to establish actions that Outlook automatically performs on messages when the specified conditions are met. The basic syntax for a rule is: *when this happens, do this*.

Outlook provides three ways to create rules: the **Organize** feature, the **Rules Wizard**, and the **Out of Office Assistant**. The Organize feature allows you to create simple rules, for example, to move certain messages to a specific folder. The Rules Wizard allows you to automate a variety of different tasks, for example, moving messages into a specific folder or assigning categories to a message. The Out of Office Assistant allows you to configure an automatic response to messages you receive while you are on leave or mission.

# Creating a Rule with Organize

The **Organize** tool on the Standard toolbar enables you to create rules, change views, and manage junk e-mail messages. The following examples give you some ideas about how this feature can help you organize your e-mail messages.

- **Using Folders**—You can create a new folder to store messages from your boss, and then set up a rule to automatically move all future messages from your boss into that folder.
- **Using Colors**—You can create rules to color-code messages that meet criteria you specify. For example, you can set up a rule so that all messages from your boss appear in blue text, making it easy for you to identify them.
- **Using Views**—You can change the way you view your messages. You might want to view your messages by sender, for example, so that all messages from your boss are grouped together in the Inbox. There are many custom views that you can choose from, but you can also create your own views.
- **Junk E-mail**—You can filter out commercial and other unwanted e-mail messages so that they don't clutter your Inbox. You can move junk e-mail messages to your Deleted Items folder, move them to another folder to view later, or you can color-code them so that they are easy to identify.

## How To Organize Mail

Step 1. Choose the **Inbox** folder.

Step 2. From the **Standard** toolbar, choose **Organize**.


Step 3. Choose one of the available options as described above.

Step 4. Select the options you want by choosing the down arrow next to each box in the bulleted item.

Step 5. Choose the **Turn on** or **Move** button.

# Using the Rules Wizard

The Rules Wizard helps you manage your e-mail by using rules to automatically perform actions on messages. After you create a rule, Microsoft Outlook applies the rule when messages arrive in your Inbox or when you send a message. You can turn on or off the rules you create and change the order in which the rules are applied.

## What the Rules Wizard *Can* Do

The following are some of the actions that the Outlook Rules Wizard can do:

- Maintain your incoming and outgoing messages in the same folder. You can set up a rule to move all incoming messages related to a specific topic into one folder and another rule to move all outgoing messages related to the same topic into the same folder.
- Create separate rules to work with multiple criteria. To move an incoming message to a folder and forward it to another person, you would need to create two separate rules.
- Create a rule with an exception to exclude messages that meet certain criteria.
- Move messages to subfolders, or use categories as an alternative to folders. Categories can be used as an organizational tool; you can assign categories to messages, then group or filter your messages by the categories assigned.

## What the Rules Wizard *Cannot* Do

The following are some of the actions that the Outlook Rules Wizard cannot do:

- Forward mail to an Internet address. You cannot create a rule to have your Fund mail forwarded to your E-mail address at home.
- Create a rule to send a reply to Internet mail.
- Create a rule to move the Read/Delivered Receipt messages to other folders and have the receipts process automatically to update the tracking status of messages. The receipts must stay in the Inbox in order for them to process automatically. You can turn on the Delete Receipts After Processing feature to have the receipts delete from the Inbox once they have processed.
- Designate multiple criteria for message content.
- Create “OR” rules for two different types of things such as people or subject content.
- Create a rule with sound notification without having a sound card.
- Create a rule for a subfolder to manipulate already filed items.

# Creating a Rule with the Rules Wizard

Like other wizards, the Rules Wizard walks you through the process of creating a rule. The Rules Wizard provides you with a list of rule types; once you have selected the type of rule, the Rules Wizard will prompt you to answer a series of questions based on the chosen rule type.

The **Rules Wizard** can be divided into five basic parts:

**Part 1. What type of rule do you want to create?**

- Select the type of rule you wish to create. Use the *Build as I go* rule to create a rule from scratch.
- Determine if the selected rule should be applied to incoming or outgoing messages.

**Part 2. Which conditions do you want to check?**

- Identify additional conditions, for example, the message contains specific words or phrases or the message is from a specified person.

**Part 3. What do you want to do to the message?**

- Identify additional actions you wish to take on those messages that match the set conditions. For example, flag the message for action in a number of days or move the message to a specified folder.

**Part 4. Add any exceptions to the rule, if necessary.**

- Identify any exceptions to the previously defined set of conditions. For example, adding a "Read:" exception to a move rule to keep the Read receipts in the Inbox so they can automatically process and update the Tracking information.

**Part 5. Name the rule.**

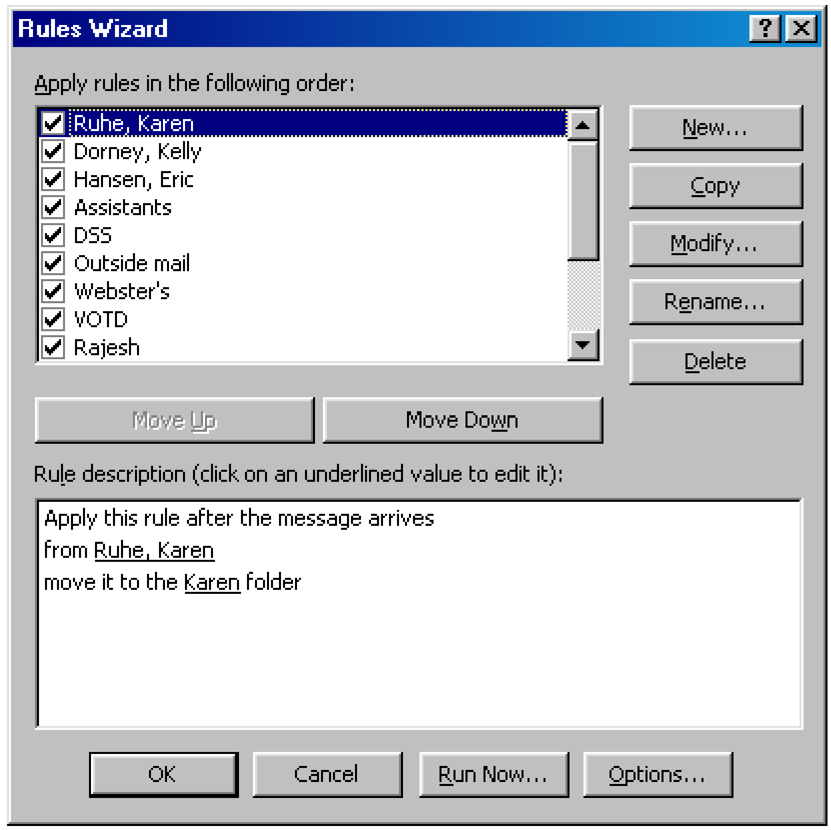
- Enter a name for the rule. Outlook provides a name based on the contents of the rule, but this can be modified.
- Specify whether the rule should be activated. By default, Outlook will activate the rule once you have completed the Rules Wizard.

## Part 1: How to Set the Type of Rule

Step 1. Switch to the Main Outlook window, if necessary.

Step 2. From the **Tools** menu, choose **Rules Wizard**.

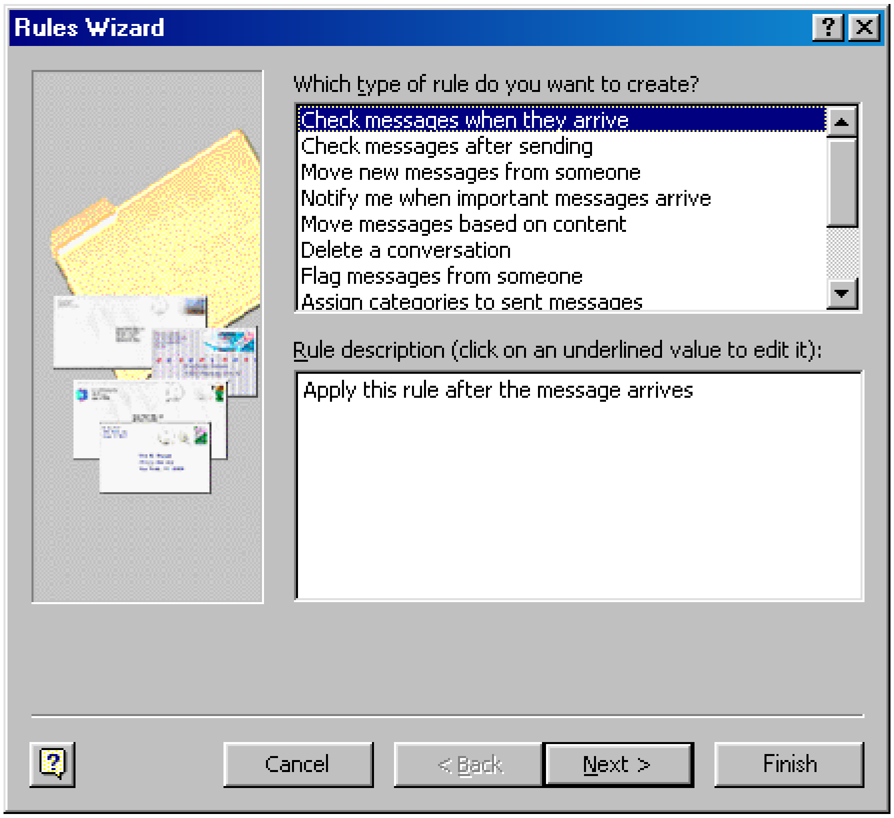
A dialog box similar to the following will appear:




STEPS CONTINUE ON NEXT PAGE

Step 3. From the **Rules Wizard** dialog box, choose **New**.

A dialog box similar to the following will appear:



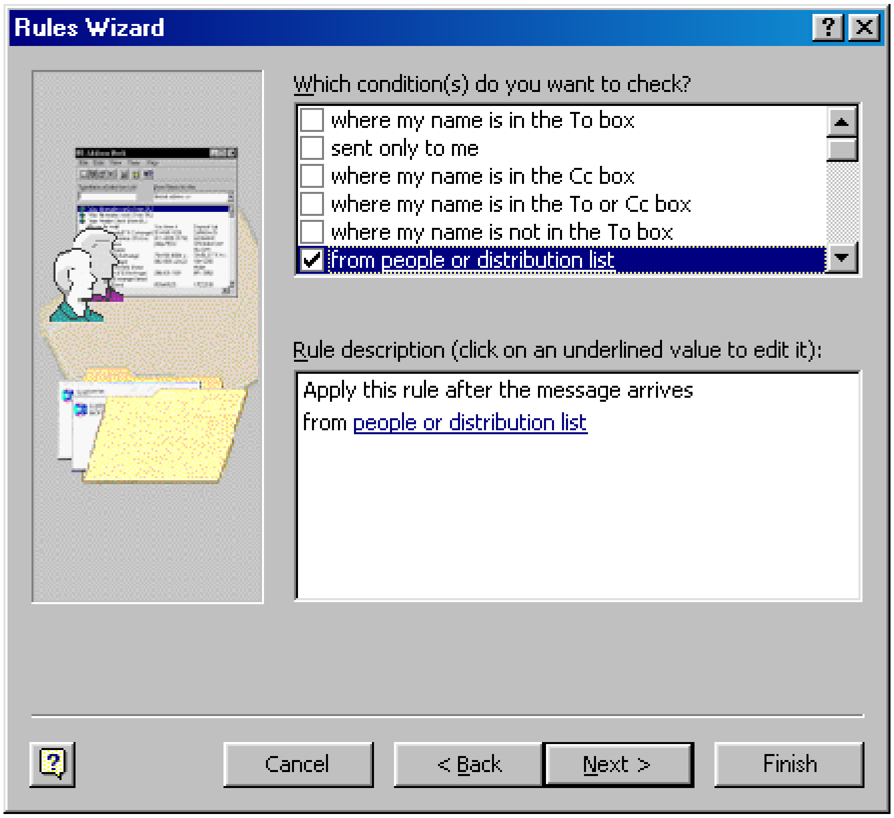

Step 4. From the **Which type of rule do you want to create** list, choose the appropriate rule.

Step 5. From the **Rule description** section, click on any underlined text to add the necessary conditions/actions.

Step 6. Choose **Next**.

## Part 2: How to Set Conditions for Rules

After completing Part 1 of the Rules Wizard, a dialog box similar to the following will appear:




Step 7. From the **Which condition(s) do you want to check** list box, place a check next to each desired condition

or

Remove the check from the undesired conditions.

Step 8. In the **Rule Description** text box, select the underlined text for these selections and set the appropriate criteria.

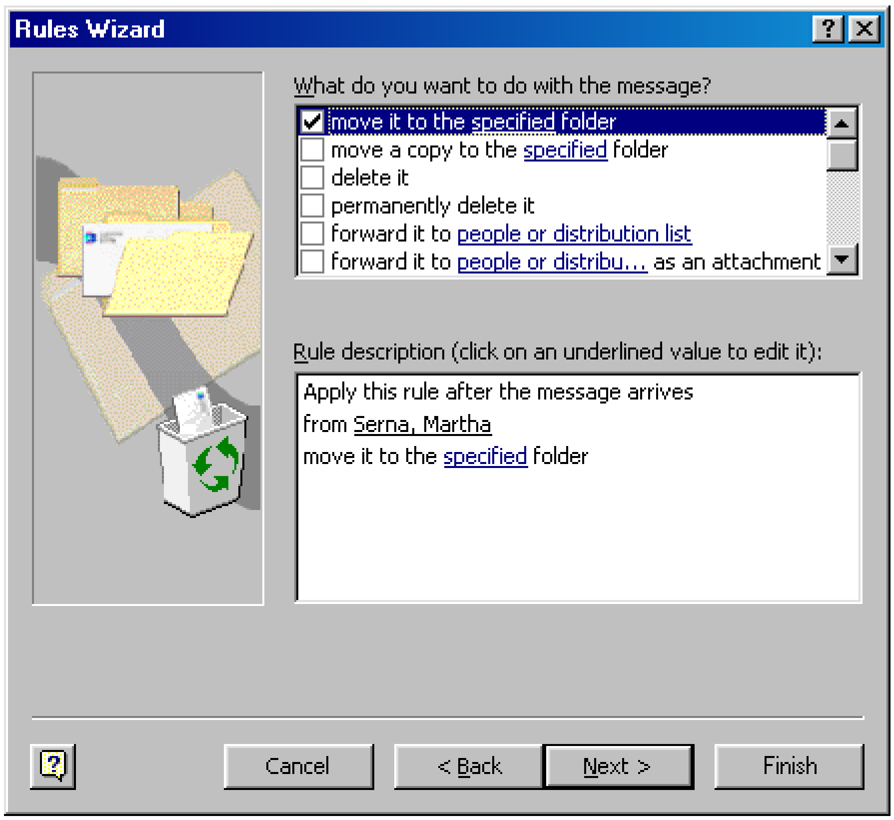
Step 9. Repeat Step 8 as necessary.

Step 10. Choose **Next**.

You can specify more than one value within some conditions by separating each value with a semicolon (;). This creates an "or" condition; each message must meet one of the conditions to be included in the search result. Outlook will not allow "or" conditions in content areas.

## Part 3: How to Specify an Action for a Rule

After completing Part 2 of the Rules Wizard, a dialog box similar to the following will appear:




Step 11. From the **What do you want to do with the message** list box, place a check next to each desired action

or

Remove the check from each unnecessary action.

STEPS CONTINUE ON NEXT PAGE

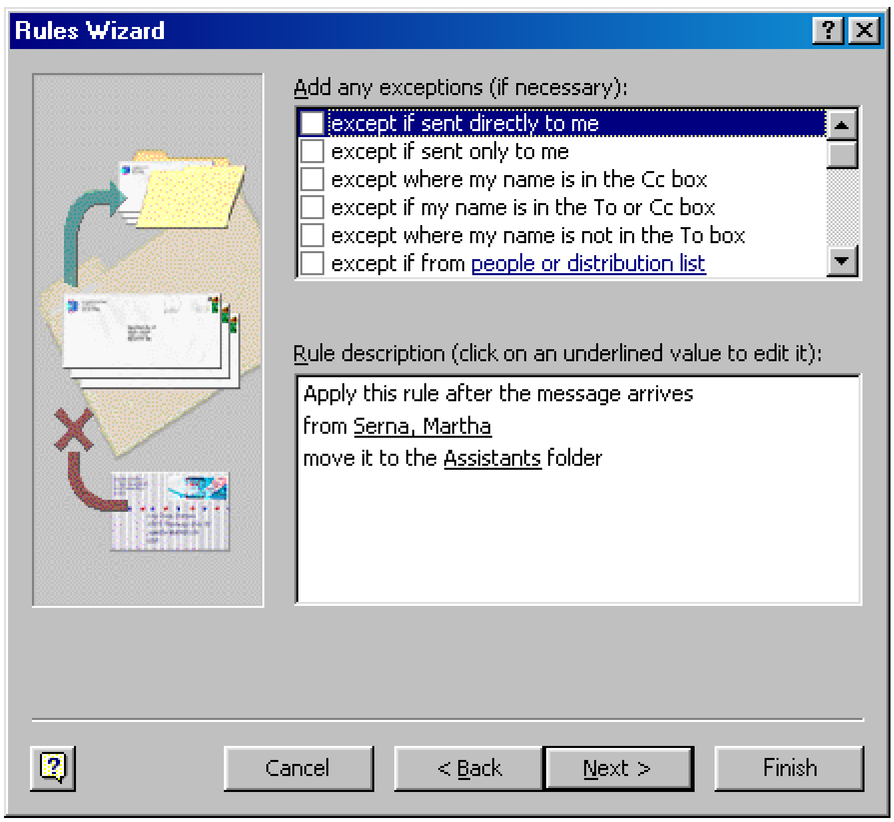
Step 12. In the **Rule Description** text box, select the underlined text for these selections and set the appropriate criteria.

Step 13. Repeat Step 12 as necessary.

Step 14. Choose **Next**.

## Part 4: How to Set Exceptions to the Rule

After completing Part 3 of the Rules Wizard, a dialog box similar to the following will appear:




Step 15. From the **Add any exceptions (if necessary)** list box, place a check next to each desired exception

or

Remove the check from each unnecessary exception.

STEPS CONTINUE ON NEXT PAGE

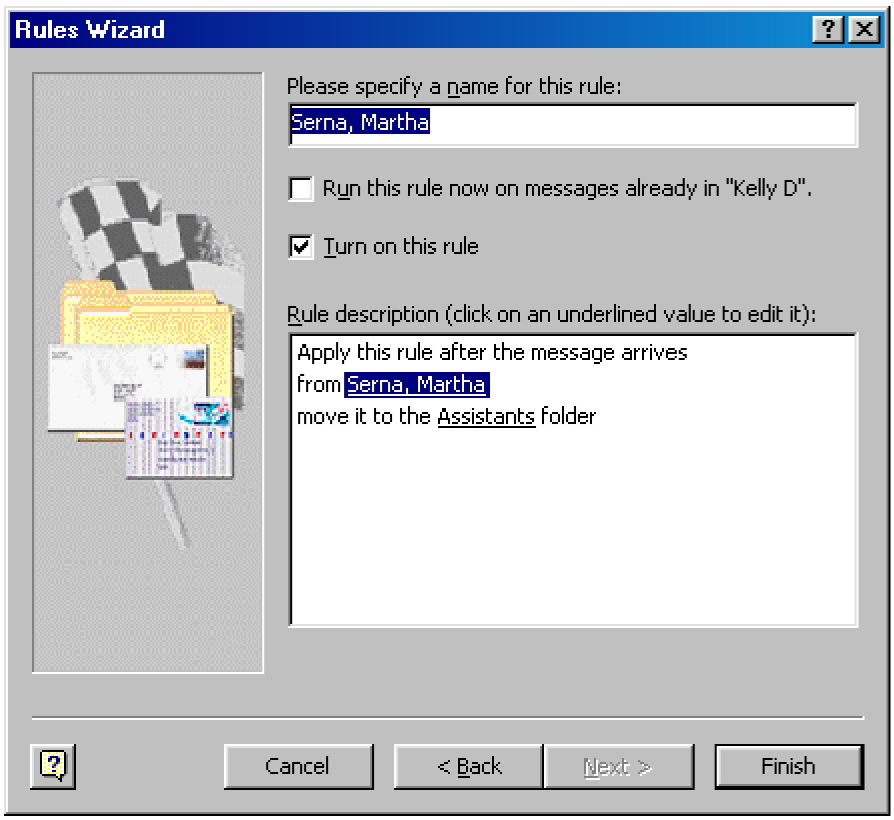
Step 16. In the **Rule Description** text box, select the underlined text for these selections and set the appropriate criteria.

Step 17. Repeat Step 16 as necessary.

Step 18. Choose **Next**.

## Part 5: How to Name a Rule

After completing Part 4 of the Rules Wizard, a dialog box similar to the following will appear:




Step 19. In the **Please specify a name for this rule** text box, type in the desired name.

STEPS CONTINUE ON NEXT PAGE

Step 20. In the **Turn on this rule** check box, ensure that a check appears if you would like to have the rule turned on when the Wizard is complete

or

Remove the check if you do not want the rule turned on when the Wizard is complete.

Step 21. Choose **Finish**.

Step 22. Choose **OK** to close the **Rules Wizard** dialog box.

# Copying Rules

Once a rule has been created, it can be copied and used as the basis for additional rules. For example, a move rule can be copied and edited to reflect the new criteria.

## How to Copy a Rule

Step 1. Switch to the main Outlook window, if necessary.

Step 2. From the **Tools** menu, choose **Rules Wizard**.

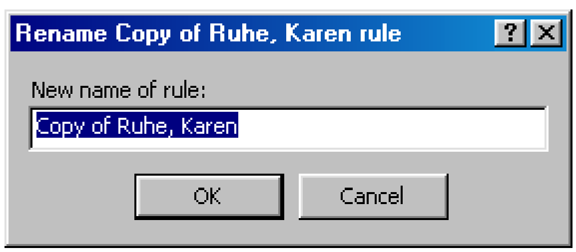
Step 3. From the **Apply rules in the following order** list box, choose the rule that you want to duplicate.

Step 4. From the **Rules Wizard** dialog box, choose **Copy**. Outlook will create a rule called ***Copy of OriginalRuleName***.

Step 5. From the **Apply rules in the following order** list box, choose the newly created rule.

Step 6. Choose the **Rename** button.

A dialog box similar to the following will appear:




Step 7. Type the new name for the rule.

Step 8. Choose **OK**.

# Modifying Rules

After creating a rule, you may need to fine-tune the criteria to enhance its performance.

## How to Modify a Rule

Step 1. Switch to the main Outlook window, if necessary.

Step 2. From the **Tools** menu, choose **Rules Wizard**.

Step 3. From the **Apply rules in the following order** list box, choose the rule that you want to modify.

Step 4. From the **Rules Wizard** dialog box, choose **Modify**. Outlook opens the Rules Wizard.

Step 5. In the **Rules Wizard**, edit the necessary steps.

Step 6. Once all edits have been made in the **Rules Wizard**, choose **Finish**.

Step 7. Choose **OK**.

You can specify more than one value within some conditions by separating each value with a semicolon (;). This creates an "or" condition; each message must meet one of the conditions to be included in the search result. Outlook will not allow "or" conditions in content areas.

# Renaming Rules

You can rename a rule to reflect its content. Renaming is commonly done after rules are copied or modified.

## How to Rename a Rule

Step 1. Switch to the Main Outlook window, if necessary.

Step 2. From the **Tools** menu, choose **Rules Wizard**.

Step 3. From the **Apply rules in the following order** list box, choose the rule to rename.

Step 4. From the **Rules Wizard** dialog box, choose **Rename**.

A dialog box similar to the following appears:


Step 5. In the **New name of rule** text box, type the desired name.

Step 6. Choose **OK** to close the **Rename** dialog box.

Step 7. Choose **OK** to close the **Rules Wizard** dialog box.

# Changing the Order of Rules

In Outlook, rules are processed in the order by which they appear in the *Apply rules in the following order* list box. By default, the rules will appear in the order in which they are created. It may be necessary to adjust the order of the rules to have messages processed correctly.

## How to Change the Order in Which Rules are Executed

Step 1. Switch to the main Outlook window, if necessary.

Step 2. From the **Tools** menu, choose **Rules Wizard**.

Step 3. From the **Apply rules in the following order** list box, choose the rule to move.

Step 4. From the **Rules Wizard** dialog box, choose **Move Up** to move the rule before the previously listed rule

or

Choose **Move Down** to move the rule after the next rule listed.

Step 5. Repeat Step 4 until the rules appear in the desired order.

Step 6. Choose **OK**.

# Turning Rules Off and On

When a rule is created, the Rules Wizard will turn the rule on by default. You can turn rules off and on as necessary.

## How to Turn a Rule Off

Step 1. Switch to the main Outlook window, if necessary.

Step 2. From the **Tools** menu, choose **Rules Wizard**.

Step 3. From the **Apply rules in the following order** list box, choose the rule to turn off.

Step 4. From the **Rules Wizard** dialog box, remove the check from the box associated with the selected rule.

The rule name should look similar to this:


Step 5. Choose **OK**.

## How to Turn a Rule On

Step 1. Switch to the main Outlook window, if necessary.

Step 2. From the **Tools** menu, choose **Rules Wizard**.

Step 3. From the **Apply rules in the following order** list box, choose the rule to turn on.

Step 4. From the **Rules Wizard** dialog box, place a check in the box associated with the selected rule.

The rule name should look similar to this:


Step 5. Choose **OK**.

# Deleting Rules

When necessary you can delete rules from the *Apply rules in the following order* list box.

## How to Delete a Rule

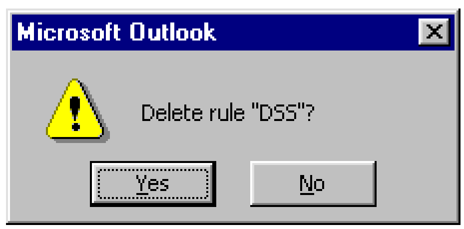
Step 1. Switch to the main Outlook window, if necessary.

Step 2. From the **Tools** menu, select **Rules Wizard**.

Step 3. From the **Apply rules in the following order** list box, choose the rule to delete.

Step 4. From the **Rules Wizard** dialog box, choose **Delete**.

The dialog box similar to the following will appear:




Step 5. Choose **Yes** to confirm your action.

# Creating an Out of Office Rule

You can create a rule to notify others that you are out of the office. When the rule is activated, those people who send you a message will receive a single response stating that you are currently out of the office. In Outlook, the Out of Office Assistant is used to create this type of rule.

## What the Out of Office Assistant *Can* Do

The following are some of the actions that the Out of Office Assistant can do:

- Forward mail to another Fund staff member. Messages can only be forwarded internally.
- Move or copy mail to a specified folder.
- Delete mail messages.
- Reply to mail with a Template or Form.

## What the Out of Office Assistant *Cannot* Do

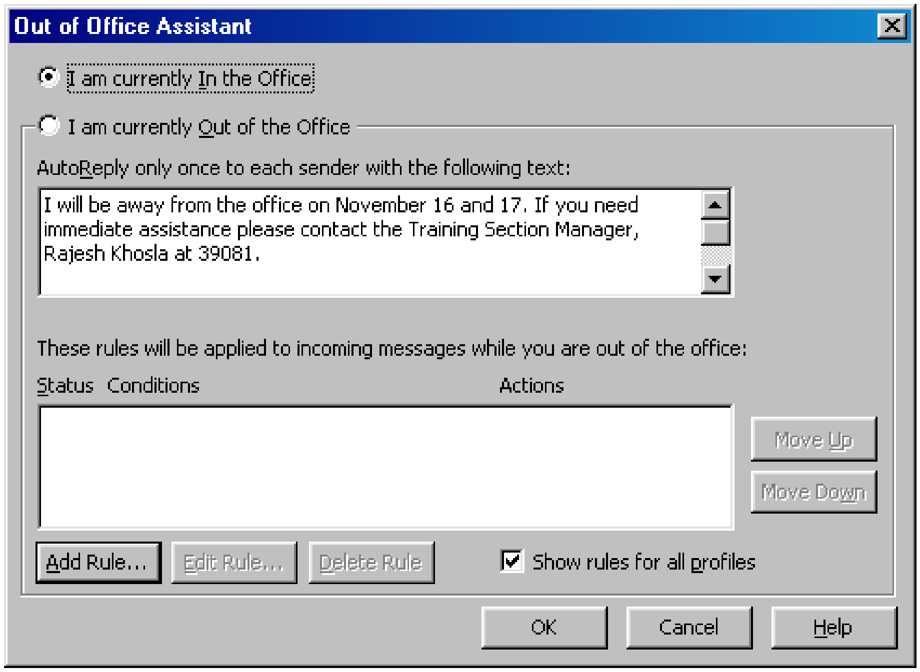
The following are some of the actions that the Out of Office Assistant cannot do:

- Reply to Internet mail with Out of Office message.
- Create a rule to notify you with a message or sound, unless the computer is on (because an alert rule is client-based).

The sender of a message will be notified only once that you are out of the office; no notification will be sent for subsequent messages received by the sender.

The Out of Office Assistant will not send an out of office notification to Internet mail.

The **Out of Office Assistant** dialog box similar to the following is shown below:




| Option | Description |
|---|---|
| **I am currently In the Office** | Turns off the Out of Office Assistant when selected. |
| **I am currently Out of the Office** | Turns on the Out of Office Assistant when selected. |
| **AutoReply only once to each sender with the following text** | Contains your reply to messages received while you are out of the office. This message is sent only once to each person who sends you mail while you are away. |
| **These rules will be applied to incoming messages while you are out of the office** | Lists the rules you specified for incoming messages while you are out of the office. Any message that meets the criteria specified in one of these rules will not receive an AutoReply message. |
| **Status** | Displays whether each rule is turned on or off. A red X indicates an error occurred when the rule was last processed. |
| **Conditions** | Lists the conditions a message must meet to activate the rule. |
| **Actions** | Lists the actions applied to a message when it meets the conditions listed in the Conditions column. |

| Option | Description |
|---|---|
| **Move Up** | Moves the selected rule up one position in the list. |
| **Move Down** | Moves the selected rule down one position in the list. |
| **Add Rule** | Creates a new rule. |
| **Edit Rule** | Modifies the selected rule. |
| **Delete Rule** | Removes the selected rule. |
| **Show rules for all profiles** | Shows rules you defined in other profiles. |

## How to Create an "Out of Office" Message

Step 1. Switch to the main Outlook window, if necessary.

Step 2. From the **Tools** menu, choose **Out of Office Assistant**.

Step 3. From the **Out of Office Assistant** dialog box, select **I am currently Out of the Office**.

Step 4. In the **AutoReply only once to each sender with the following text**, type the message you want the senders to receive while you are out of the office.

Step 5. Choose **OK**.

The sender of a message will be notified only once that you are out of the office; no notification will be sent for subsequent messages received by the sender.

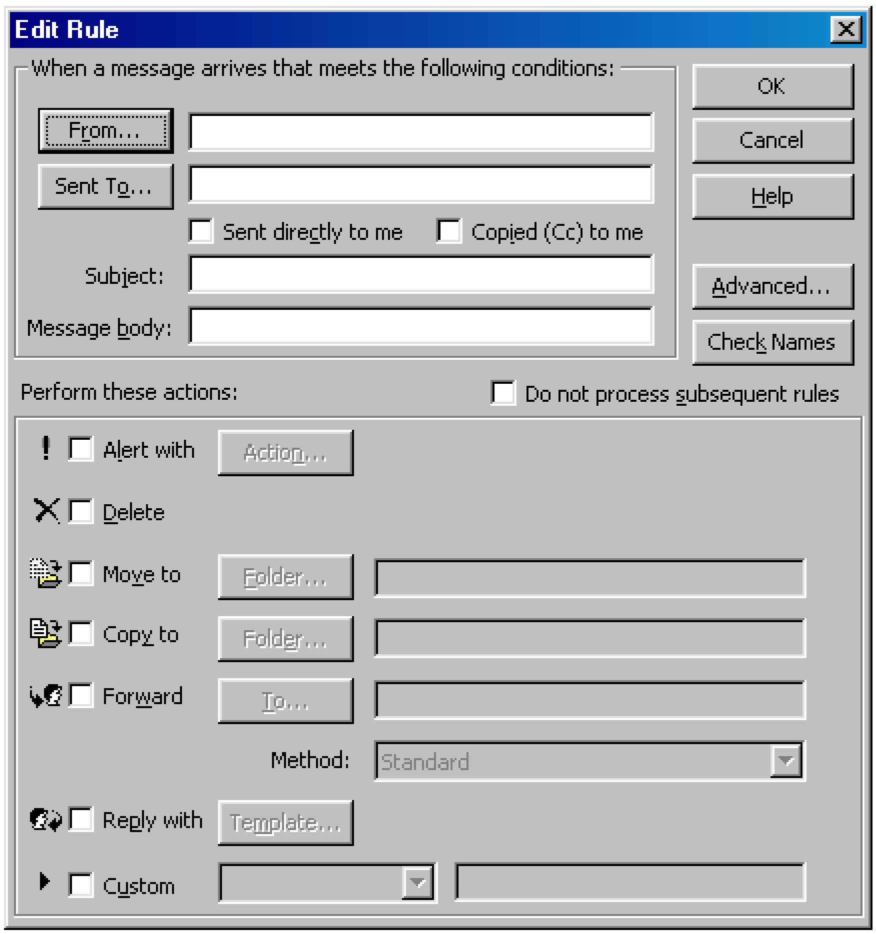
The Out of Office Assistant will not send an out of office notification to Internet mail.

# Adding Exceptions to the Out of Office Assistant

The Rules portion of the Out of Office Assistant allows you to specify conditions that identify messages to process. If an incoming message is received that meets the designated criteria, the rule will automatically process that message according to the demands of the rule.

While completing the Edit Rule dialog box, you are prompted to specify the conditions or criteria to search for in the **When a message arrives that meets the following conditions** area of the dialog box. Once the desired conditions have been identified, you must specify how the message will be treated in the **Perform these actions** area of the **Edit Rule** dialog box.

The Out of Office Assistant **Edit Rule** dialog box is shown below:



| Option | Description |
|---|---|
| **From** | Identifies messages received from specific senders. You must specify the sender's complete address; Outlook does not understand partial addresses. |
| **Sent To** | Identifies messages addressed to specific recipients, for example, FUNDALL or HRDALL. You must specify the complete address; Outlook does not understand partial addresses. |
| **Sent directly to me** | Locates messages that have your name in the **To** box. |
| **Copied (CC) to me** | Locates messages that have your name in the **CC** box. |
| **Subject** | Specifies particular words or phrases to locate in the subject line. |
| **Message body** | Specifies particular words or phrases to locate in the message body. |
| **Do not process subsequent rules** | Prevents Outlook from activating rules that appear in the **These rules will be applied to incoming messages while you are out of the office** list. |
| **Alert with** | Notifies you with a message and/or sound when you receive a message that meets the conditions you specified. |
| **Delete** | Deletes the message. The deleted message will appear in the Deleted Items folder. |
| **Move to** | Moves the message to the specified folder. |
| **Copy to** | Copies the message to the specified folder. |
| **Forward** | Forwards the message to the recipient you specify. You must specify the complete address; Outlook does not understand partial addresses. |
| **Reply with** | Sends an automatic reply to the sender. |
| **Custom** | Custom actions are additional features that are not provided by Outlook. |
| **Advanced** | Specifies additional search conditions. For example, you can locate messages that have attachments, that are a particular size, or that do not meet the conditions you specify. |
| **Check Names** | Verifies the names in the **From** and **Sent To** boxes by checking them against the entries in your Address Book. |

## How to Add an Exception to the Out of Office Assistant

Step 1. Switch to the main Outlook window, if necessary.

Step 2. From the **Tools** menu, choose **Out of Office Assistant**.

Step 3. From the **Out of Office Assistant** dialog box, select **I am currently Out of the Office**.

Step 4. In the **AutoReply only once to each sender with the following text**, type the message you want the senders to receive while you are out of the office.

Step 5. From the **Out of Office Assistant** dialog box, choose **Add Rule**.

Step 6. In the **Edit Rule** dialog box, specify the criteria for the incoming mail items in the **When a message arrives that meets the following conditions** area.

Step 7. In the **Perform these actions** area, specify how the message will be treated.

Step 8. When finished defining the rule, choose **OK**. This will close the **Edit Rule** dialog box.

Step 9. Repeat Steps 5 through 8 until all necessary rules have been added.

Step 10. Select **OK**.

You can specify more than one value within certain conditions by separating each value with a semicolon (;). This creates an "or" condition; each message must meet one of the conditions to be included in the search result. Outlook will not allow "or" conditions in content areas.

Use the Move Up and Move Down buttons to adjust the order of the rules.

# Turning Off the Out of Office Assistant

After creating a leave rule with the Out of Office Assistant, the rule is automatically turned on. However, if you are not ready to have your leave rule on, you may turn off the Out of Office Assistant temporarily.

If the Out of Office Assistant is turned on, the next time you open Outlook you will be prompted to turn it off.

## How to Turn Off the Out of Office Notification

Step 1. Switch to the main Outlook window, if necessary.

Step 2. From the **Tools** menu, choose **Out of Office Assistant**.

Step 3. From the **Out of Office Assistant** dialog box, select **I am currently In the Office**.

Step 4. Choose **OK**.

The AutoReply text and rules within the Out of Office Assistant are not removed when the Out of Office Assistant is turned off. They may need to be edited, however, the next time you turn on the Out of Office Assistant.

Lesson

2

# Granting Access Rights to Others

*In this lesson, you will learn the skills necessary to:*

- ✓ *Grant permissions to others to access your Outlook folders.*
- ✓ *Grant various levels of permissions to your Outlook folders.*
- ✓ *Use granted permissions to view another's Outlook folders.*
- ✓ *Edit or remove permissions granted to individuals.*

# Comparing and Contrasting Delegates and Permissions

Granting delegates and permissions allows others to access your mailbox. When you assign an individual delegate rights, you are allowing him/her to send messages on your behalf. When you assign an individual permissions, you allow him/her to view and possibly modify the contents of your mailbox. The table below outlines the similarities and differences between delegates and permissions.

**Comparing Delegates and Permissions**

| Delegates | Permissions |
|---|---|
| ▪ Individuals can view, read, modify, and create the contents of your mailbox. | ▪ Individuals can view, read, modify, and create the contents of your mailbox. |
| ▪ Individuals can send messages on your behalf. For this to occur, the individual must display and type your name in the **From** field. | ▪ Individuals with permissions will have the ability to send messages while viewing your mailbox but the message will not be sent on your behalf. |
| ▪ You can only grant delegate rights to the main folder. You are not able to grant delegate rights to subfolders you have created. | ▪ You can grant permissions to Outlook folders.<br>▪ You can fine-tune a delegate's access by changing the settings found within the permissions tab. |

If you want the person to whom you are granting access rights to send and respond to messages on your behalf, you first need to grant that person delegate rights and then use permissions to alter his/her access and responding ability if necessary. If you do not want them to send on your behalf, use permissions only to grant their access rights.

# Granting Delegate Rights

When you give an individual delegate access to your mail folders, the individual may have the capability to view your mail folders and send mail on your behalf. The level of the user's capabilities is dictated by the role you assign to that individual. The table below describes the different roles available through the Delegates option.

**Delegate Permissions**

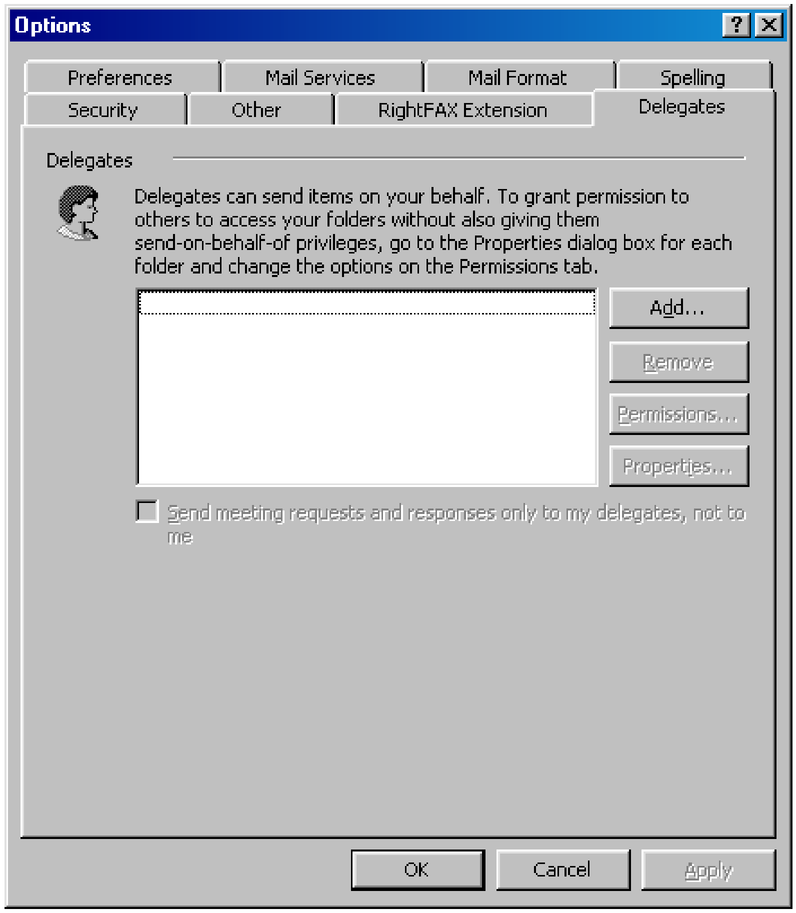
| Permission | Definition |
|---|---|
| **None** | Grants no permission to the folder. |
| **Reviewer** | Grants permission to only read items. |
| **Author** | Grants permission to create, modify, and read items the delegated individual creates, as well as the ability to modify and delete items the owner creates. |
| **Editor** | Grants permission to create, read, modify, and delete all items. |
| **Custom** | Customized settings that do not match any of the above defaults. The owner of the folder alters the settings through the **Permissions** dialog box. |

## How to Grant Delegate Rights

Step 1. From the **Tools** menu, select **Options**.

Step 2. From the **Options** dialog box, select the **Delegates** tab.

A dialog box similar to the following will appear:




Step 3. Select **Add**.

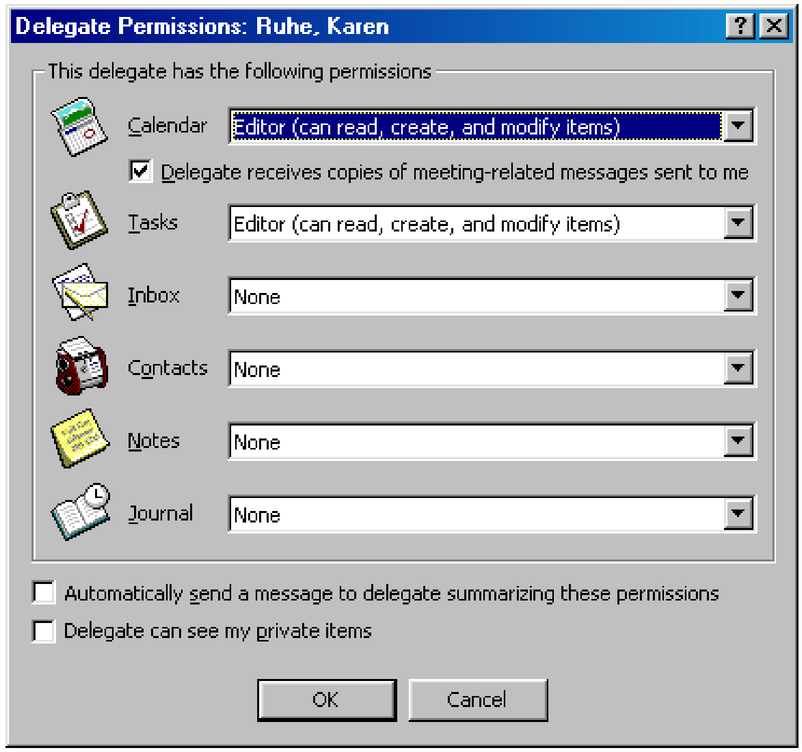
Step 4. In the **Add Users** dialog box, type or select the user's name.

Step 5. Choose **Add**.

Step 6. Choose **OK**.

STEPS CONTINUE ON NEXT PAGE

A dialog box similar to the following will appear:




Step 7. For each of the main folders you are granting rights to, select the desired level of permissions from the drop-down list.

You may wish to clear the default setting *Delegate receives copies of meeting-related messages sent to me*. This option will send duplicate appointments to the delegate's Calendar and Inbox.

Step 8. Check the **Automatically send a message to delegate summarizing these permissions** options, if desired.

Step 9. Check **Delegate can see my private items** if you want your delegate to be able to see items that have been marked as private.

Step 10. Choose **OK** to return to the **Options** dialog box.

Step 11. Choose **OK** to return to the main **Outlook** window.

# Granting Permissions

Permissions are access rights that you give to others so they can look at or edit the contents of your Outlook folders. Permissions also allow you to adjust the access rights assigned through the Delegate option. Permissions are granted on a folder by folder basis. If you wish to grant one person permission to look in both your Inbox and Calendar, you will need to grant permission twice, once for each folder. The table below describes the different levels and types of permissions.

If you grant permissions to the Inbox, all new folders you create under the Inbox will automatically be set with the same permission rights as your Inbox.

Never assign permissions to the **Default**, because this will give all staff the permissions assigned to that entry.

**TYPES OF PERMISSIONS**

| Type | Description |
|---|---|
| **Owner** | Grants all permissions in the folder. Create, read, modify, and delete all items and create subfolders. Owners can also change permission levels granted to other people. |
| **Publishing Editor** | Grants permission to create, read, modify, and delete all items and create subfolders. |
| **Editor** | Grants permission to create, read, modify, and delete all items. |
| **Publishing Author** | Grants permission to create and read items and files, modify and delete items and files you create, and create subfolders. |
| **Author** | Grants permission to create, modify, and read items the proxy user creates, as well as the ability to modify and delete items the owner creates. |
| **Nonediting Author** | Grants permission to create and read items. |
| **Reviewer** | Grants permission to only read items. |
| **Contributor** | Grants permission to only create items. The contents of the folder is not shown. |
| **None** | Grants no permission to the folder. Use this as the default permission when you want to limit the folder audience to only users you specifically add to the Name/Role box. |
| **Custom** | Perform activities defined by the folder owner. |

### TYPES OF PERMISSIONS

| Type | Description |
|---|---|
| **Create Items** | Grants permission to post or create items in the folder. |
| **Read Items** | Grants permission to open any item in the folder. |
| **Create Subfolder** | Grants permission to create subfolders in the folder. |
| **Folder Owner** | Grants all permissions in the folder. |
| **Folder Contact** | Grants folder contact status. Folder contacts receive automated notifications from the folder, such as replication conflict messages, as well as requests from users for additional permissions or other changes in the folder. |
| **Folder Visible** | Ensures that the selected folder and its contents are visible. |
| **Edit Items** | Select from the following options:<br>**None**—Cannot make changes to any item.<br>**Own**—Can only modify items the proxy user creates.<br>**All**—Modify any item. |
| **Delete Items** | Select one of the following options:<br>**None**—Cannot delete any item.<br>**Own**—Can only delete items the proxy user creates.<br>**All**—Delete any item. |

When setting permissions to a subfolder, you must grant the **Folder Visible** right to view the main mailbox and Inbox folders, then set the desired permissions for the particular subfolder(s).

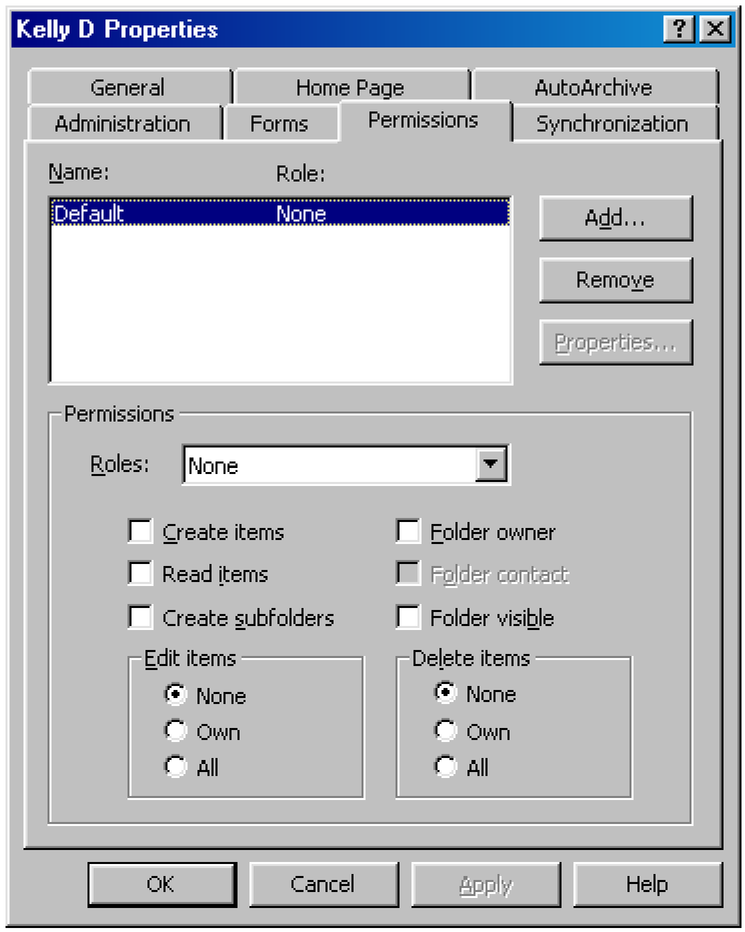
## How to Grant Permissions to a Folder

Step 1. Select the folder that will have permissions granted and right-click.

Step 2. From the Shortcut menu, select **Properties**.

Step 3. From the **Properties** dialog box, select the **Permissions** tab.

A screen similar to the following will appear:




Step 4. From the **Permissions** tab, select the **Add** button. The **Address Book** will appear.

Step 5. From the **Address Book**, choose the individual(s) you want to grant permissions to.

Step 6. Choose **OK**.

STEPS CONTINUE ON NEXT PAGE

Step 7. From the **Name** list, select the individual whose rights need to be defined.

Step 8. From the **Roles** drop-down list, select the appropriate role.

Step 9. In the **Permissions** area, adjust the role properties as necessary.

Step 10. Repeat Steps 4 through 9 to add additional individuals.

Step 11. Select **OK** when finished.

When you change the predefined permission options, the role will automatically change to the matching role or it will change to Custom.

## How to Edit Permissions

Step 1. Select the folder whose permissions you wish to change and right-click.

Step 2. From the shortcut menu, select **Properties**.

Step 3. From the **Properties** dialog box, select the **Permissions** tab.

Step 4. From the **Names** list, select the individual whose permissions you want to edit.

Step 5. From the **Roles** drop-down list, select the new role.

Step 6. In the **Permissions** area, adjust the role properties as necessary.

Step 7. Select **OK** when finished.

When you change the predefined permission options, the role will automatically change to the matching role or it will change to Custom.

## How to Remove Someone From the Permissions List

Step 1. Right-click on the folder whose permissions you want to change.

Step 2. From the shortcut menu, select **Properties**.

Step 3. From the **Properties** dialog box, select the **Permissions** tab.

Step 4. From the **Names** list, select the individual whose permissions you want to remove.

Step 5. Select the **Remove** button.

Step 6. Select **OK**.

# Viewing Another's Delegated or Permissions Granted Mailbox

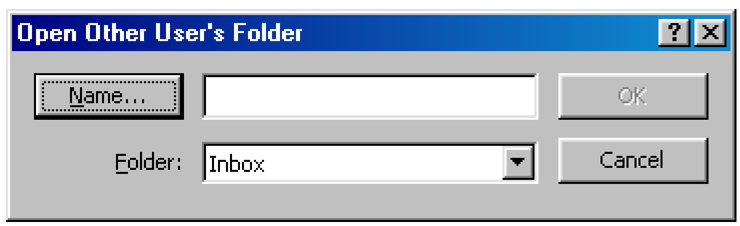
Once you have been given access to another's Outlook mailbox, you have two ways to open that mailbox. If you need only occasional access, you can use the **Open Special Folder** option. If you need constant access to the other's mailbox, you should permanently display it on your folders list or make it a shortcut on the Outlook Bar.

## How to View Another's Mailbox

Step 1. From the **File** menu, choose **Open**.

Step 2. From the **Open** submenu, choose **Other User's Folder**.

A dialog box similar to the following will appear:




Step 3. From the **Open Other User's Folder** dialog box, select the **Name** button. The **Address Book** appears.

Step 4. From the **Address Book**, select the desired name.

Step 5. Choose **OK** to close the Address Book.

Step 6. From the **Folder** drop-down list, select the folder you have been given permissions to.

Step 7. Choose **OK**. A new window will appear displaying the grantee's folder.

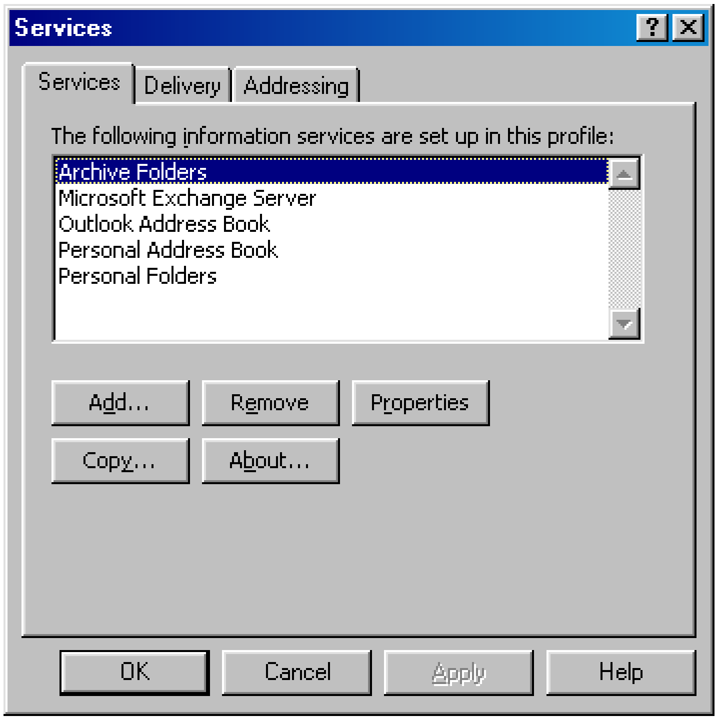
This method will only allow access to the main folders such as Inbox, Sent Items, Calendar, and Task List. To display subfolders, follow the steps in *How to Display Another's Mailbox on Your Folder List* on page 40.

## How to Display Another's Mailbox on Your Folder List

Step 1. From the **Tools** menu, select **Services**.

Step 2. From the **Services** dialog box, select the **Services** tab.

A dialog box similar to the following will appear:



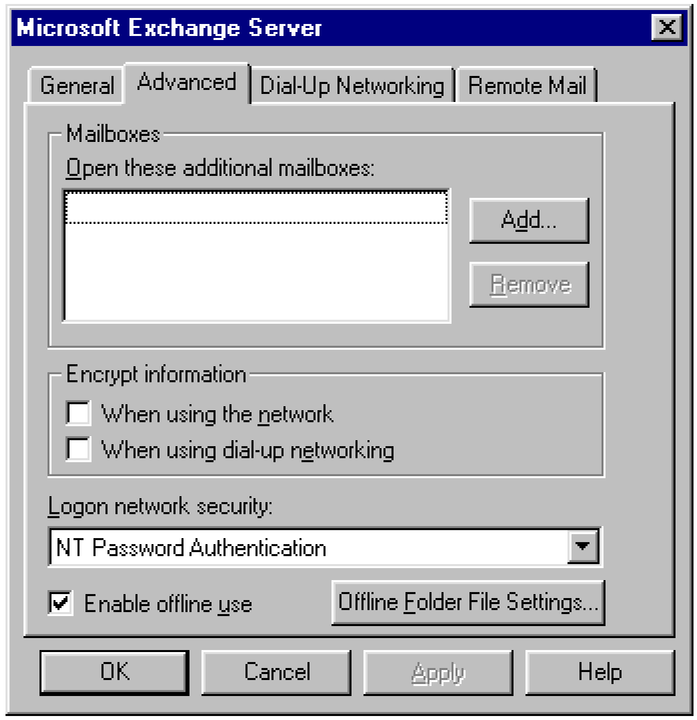

Step 3. From the **Services** list, select **Microsoft Exchange Server**.

Step 4. Select the **Properties** button.

Step 5. From the **Microsoft Exchange Server** dialog box, select the **Advanced** tab.

STEPS CONTINUE ON NEXT PAGE

A dialog box similar to the following will appear:




Step 6. In the **Open these additional mailboxes** area, choose **Add**.

Step 7. Type in the user's name using the ***Last name, First name*** format.

Step 8. Choose **OK** to close the **Microsoft Exchange Server** dialog box.

Step 9. Choose **OK** to close the **Services** dialog box.

You can add another's folder to your Outlook Bar by following the previous steps, but drag the desired folder to the Outlook Bar. Once the folder appears on the Outlook Bar, right-click on it and choose Rename to rename the folder.

# Sending Mail on Behalf of Another

If you have been given delegate access to share another person's Inbox, you have "send-on-behalf-of" rights, which means, by adding the From field to meeting requests and messages, you can send messages and meeting requests on behalf of your colleague.

## Points on Sending Mail on Behalf of Another

- You must be a delegate for that person to send mail on his/her behalf.
- The recipient will receive a message that states "on behalf of" in the From field, for example, *Eric Hansen on behalf of Kelly Dorney*.
- All replies to the message are sent to both the delegate and the person who granted delegate access.
- The sent message is saved in the delegate's Sent Items folder, and message tracking notifications are sent to the delegate instead of the person who granted delegate access.

## How to Send Mail on Behalf of Another

Step 1. Create a new mail message.

Step 2. From the **View** menu, select the **From** field if it is not already visible.

Step 3. In the **From** field of the new mail message, enter the e-mail address or alias of the person you are a delegate for.

Step 4. Complete the new mail message.

Step 5. Choose **Send**.

# Index

***A***

Add Another's Folder ................................ 41

***C***

Conditions for Rules ................................... 9
Copy a Rule............................................. 14

***D***

Delegate
  Compare to Permission ......................... 30
  Options ................................................. 31
Delegate Permissions ................................ 31
Delete a Rule............................................ 19
Display Another's Mailbox....................... 40

***E***

Edit Permissions....................................... 37
Exceptions to the Rule .............................. 11

***G***

Grant Delegate Rights............................... 32
Granting Permissions ................................ 34

***I***

Inbox .......................................................... 4

***M***

Modify a Rule ........................................... 15

***N***

Name a Rule............................................. 12

***O***

Order in Which Rules are Executed.......... 17
Organize Mail ............................................. 4
Out of Office Assistant ............................. 20
Out of Office Notification......................... 27

***P***

Permission
  Compare to Delegate............................. 30
  Options ................................................. 34
Permissions ........................................ 30, 39
  Grant ..................................................... 36
  Remove ................................................. 38

***R***

Rename a Rule .......................................... 16
Rule for the Out of Office Assistant ......... 25
Rules Wizard............................................... 5

***S***

Send Mail on Behalf of Another............... 42
Sent Items................................................. 42
Set the Type of Rule ................................... 7
Specify an Action for a Rule..................... 10

***T***

Turn a Rule Off......................................... 18
Turn a Rule On.......................................... 18

## *V*

View Another's Mailbox ........................... 39