Section 8

Topics Covered

Time Required: 1 Hr

Sharing Folders with others

If you need someone else to be able to access your Outlook folders, you can give them permission to. For example, you may have an assistant who helps you with your incoming mail or who organises your schedule for you.

There are two ways to do this: you can share a folder, allowing a particular person to access the folder and, if necessary, to work with its contents; or you can grant that person *delegate* access to the folder. Delegate access will allow the person to send and respond to messages on your behalf.

Sharing Folders

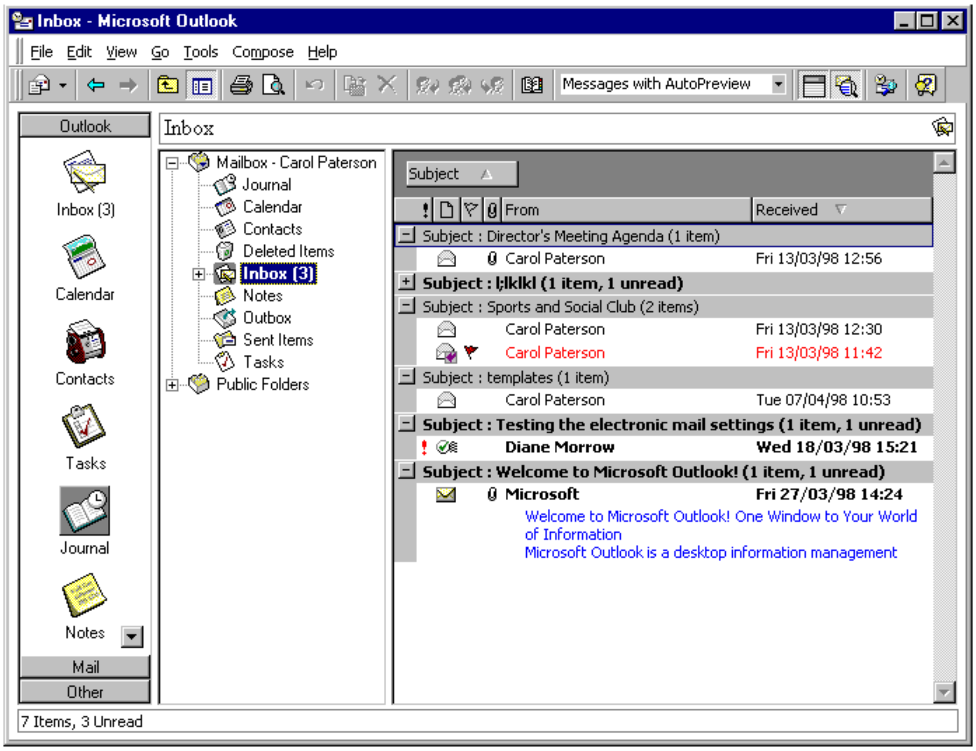
When you share a folder you can choose which operations a specified user can carry out: you can allow them to read, modify, create and/or delete information from the folder. You must also give that user permissions to access your mailbox, as this is where all your folders are stored. Outlook comes with predefined *roles*, which are combinations of permissions that can be applied to selected users. If none of these roles suits your requirements, you can create a set of custom permissions to meet your needs. The list below shows the predefined roles and the permissions that will be given to anyone assigned each role.

Role	**Permissions**
None	The specified user has no access to the contents of the shared folder.
Contributor	The specified user can create new items in the shared folder.
Reviewer	The specified user can read existing items in the shared folder.
Nonediting Author	The specified user can create and read item and files.
Author	The specified user can create items, read existing items, and edit or delete items that they have created in the shared folder.
Publishing Author	The specified user can create items, read existing items, create subfolders, and edit or delete items that they have created in the shared folder.
Editor	The specified user can create items, read existing items, and edit or delete any item in the shared folder.
Publishing Editor	The specified user can create items, read existing items, create subfolders, and edit or delete any item in the shared folder.
Owner	The specified user can create items, read existing items, create subfolders, edit or delete any item in the shared folder, and change other users' permissions to the shared folder.

Sharing Folders with others

To Share a Folder

1. Select the **View, Folder List** command to display the folder list.

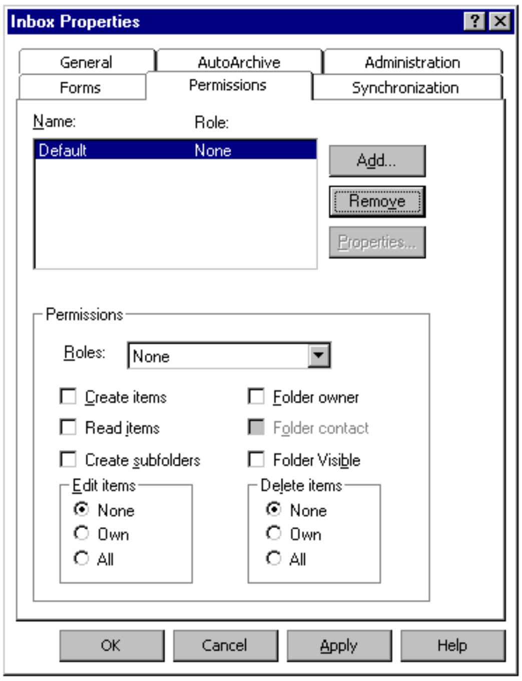


2. Right click on the folder that you want to share and choose **Properties** from the shortcut menu. /..

Sharing Folders with others

../ To Share a Folder

3. Click the **Permissions** tab to display these options.



The permissions assigned **Default** user specified in this box will be given to everyone who is not given individual permissions. In the example above, every user has no permission to access the **Inbox** folder.

4. To give a user or group of users permissions other than the default, click the **Add** button to display your address book and choose the name(s) of the required users then return to this dialogue box.

   To change the permissions for any existing user, click on that user in the **Name** list box.

5. Either choose a role from the **Roles** drop-down list or select a combination of permissions to be assigned to the selected user(s).

6. Click **OK** to apply the selected permissions.

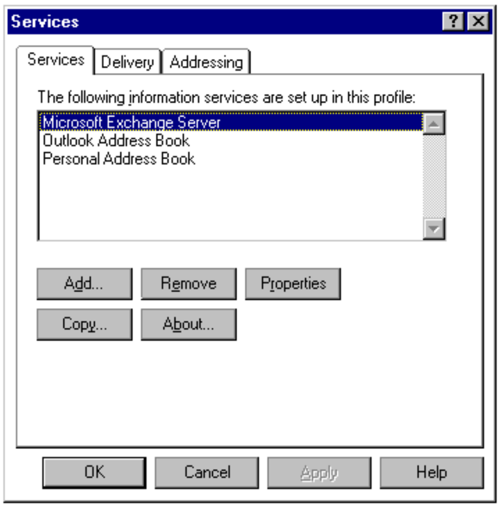
Note: The same procedure is used to assign permissions to your mailbox so that the users who have permissions to your other folders can access them. The changes that you make here are applied immediately.

Sharing Folders with others

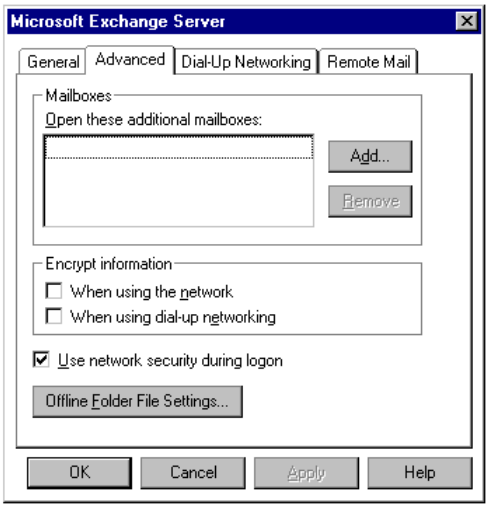
Once you have given a user permission to folders within your mailbox and to your mailbox itself, they have to add your mailbox to their folder list so that they can view and use it.

To Open Another Mailbox

1. Select the **Tools, Services** command and display the **Services** property sheet.



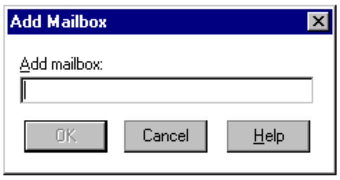
2. Select the **Microsoft Exchange Server** service and click the **Properties** button.
3. Display the **Advanced** settings. /..



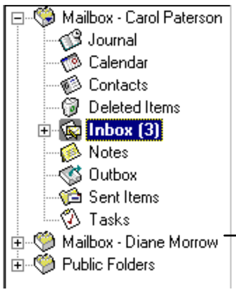
Sharing Folders with others

../ To Open Another Mailbox

4. Click the **Add** button.



5. Type the name of the user whose mailbox you want to open into the **Add mailbox** text box then click **OK**.
6. Click **OK** two more times to return to the Information viewer.



This mailbox has been added to the folders list.

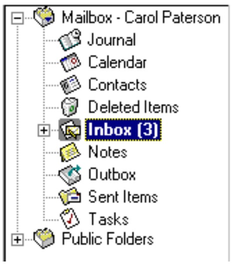
You can now display the folders to which you have permissions by double clicking on the mailbox you've added.

Exercise 8-1

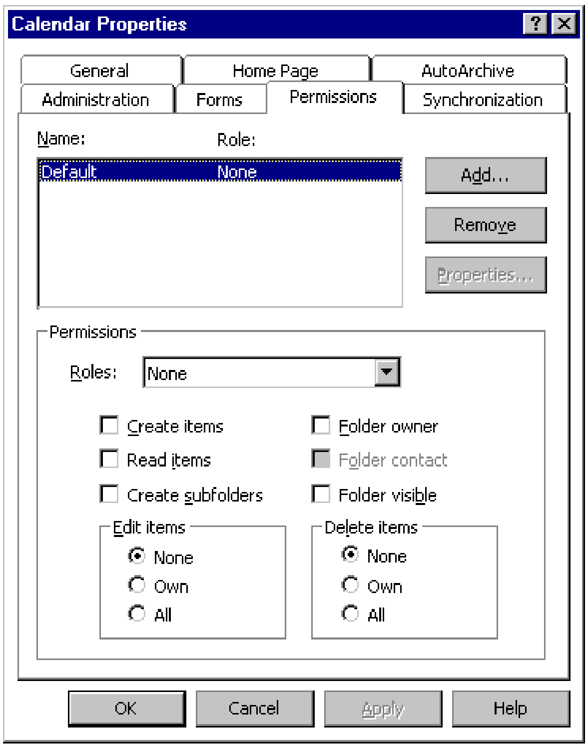
In this exercise you'll give permissions to another user to access your mailbox and **Calendar** folder.

1. Select the **View, Folders List** command.

   Your folder list is displayed. Remember that your folder list will vary slightly from that shown below.



2. Right click on **Calendar** in the folders list and choose **Properties** from the shortcut menu.
3. Click the **Permissions** tab.

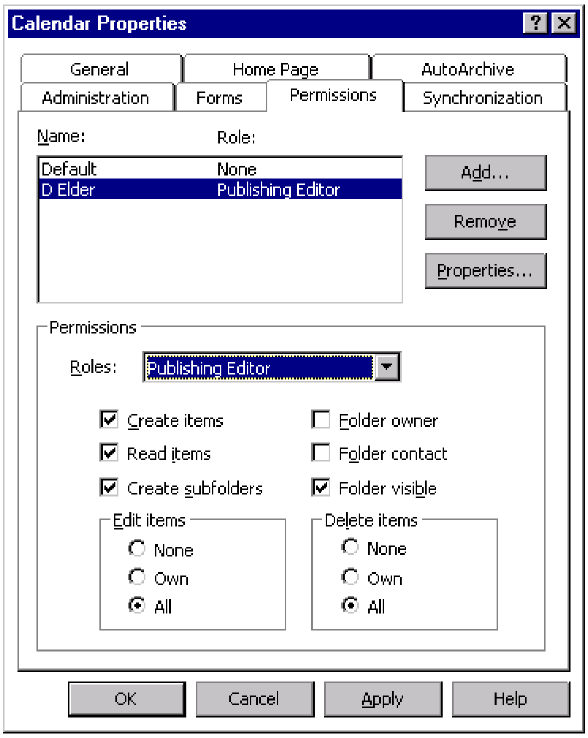


Exercise 8-1

4. Click the **Add** button to display your address book. If you're working with others, choose one of them from the address book. Otherwise, choose another user to assign permissions to then return to the **Calendar Properties** dialogue box.

5. Ensure that the user you've just added is selected in the **Name** list box and experiment with the options in the **Roles** drop-down list to see the combination of permissions activated for each.

6. When you're finished experimenting, choose **Publishing Editor** from the **Roles** drop-down list.



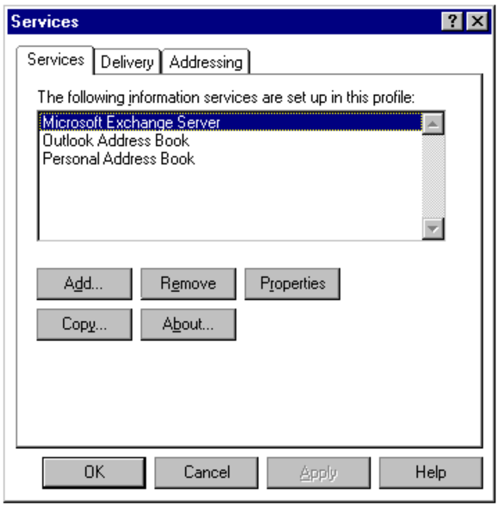
7. Click **OK** to assign these permissions.

8. Right click on your mailbox folder and choose **Properties** from the shortcut menu.

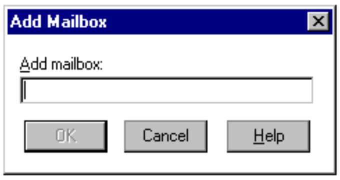
9. Display the **Permissions** property sheet and add the same user with the same permissions as before.

Exercise 8-1

10. If you're working with others, follow the instructions below to add another mailbox to your folder list.
    — Select the **Tools, Services** command and display the **Services** property sheet.



    — Select **Microsoft Exchange Server** in the list box then click the **Properties** button.
    — Display the **Advanced** settings then click the **Add** button.



    — Enter the name of a user who gave you permissions to their folder earlier in the exercise.
    — Click **OK**.
    — Return to the Information viewer.
    The mailbox has been added to your folder list.

11. Use the same command to remove the mailbox from your folder list.
12. Use the **Properties** shortcut menu option to remove the permissions you assigned to your calendar.

Naming Delegates to Your Folders

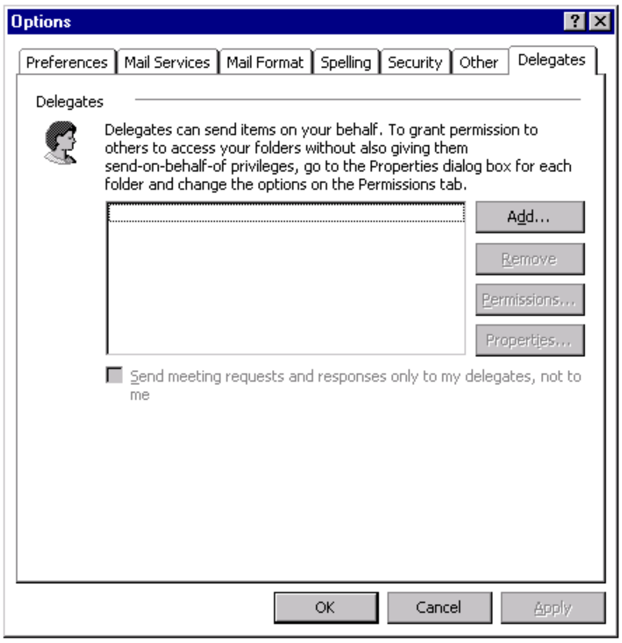
Naming a user as a delegate to your Outlook folders allows them greater control over the contents of your folders. The roles available for delegates are shown below:

Role	Permissions
None	The delegated user has no access to the contents of the folder.
Reviewer	The delegated user can open the folder and read *existing* items.
Author	The delegated user can create, read, modify and delete *their own* items in the folder.
Editor	The delegated user can create, read, modify and delete *any* items in the folder.

Any user you give any level of delegate access to will also be able send mail *on your behalf* and the message will include text informing the recipient of this. If you assign sufficient permissions to each of the folders involved, delegates can also accept meetings and/or task requests on your behalf. For example, if a user has *reviewer* delegate access to your **Inbox** folder, they will be able to read the mail that you receive. If you want this user to be able to reply to any meeting requests included in your mail, however, the user will also need *editor* permissions to your **Calendar** folder so that they can add the appointment. By default, delegates are given *editor* permissions so that they can accept meetings and task requests on your behalf.

To Name a Delegate to Your Folders

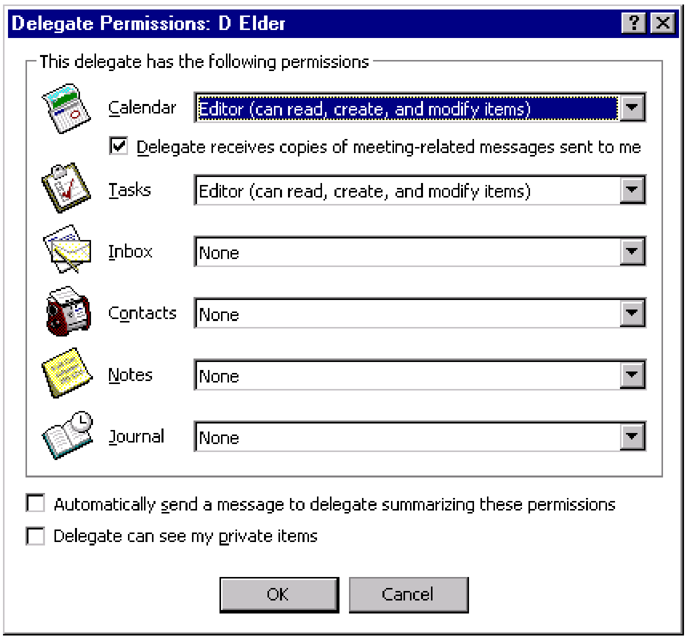
1. Select the **Tools, Options** command and display the **Delegates** property sheet. /..



Naming Delegates to Your Folders

../ To Name a Delegate to Your Folders

2. Click the **Add** button to display your address book and choose the user who is to become a delegate then click **OK**.



3. For each folder, choose the type of access that the delegate is to be given.
4. If you want Outlook to send a message to the delegate informing them of these settings, activate the **Automatically send a message...** check box.
5. Click **OK**.
6. Repeat steps **2** to **5** to add each delegate that you require.
7. When you're finished, click **OK**.

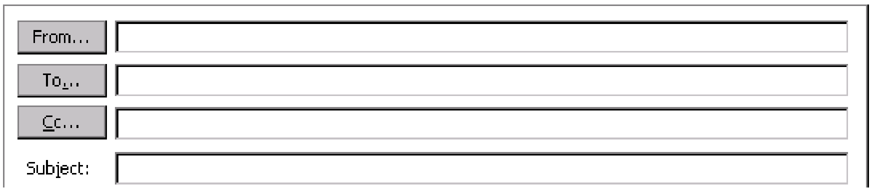
Acting as a Delegate

When you have been assigned delegate access to another user's folders, there are various tasks that you can carry out on their behalf. You are known as the *delegate* while the owner of the folder is known as the *manager*.

To Send Mail as a Delegate

1. Create a mail message using one of the usual methods.
2. Select the **View, From Field** command.

   An extra field is added to the message window.

3. In the **From** box, enter the name of the person on whose behalf you're sending the message.
4. Compose the message as required.
5. Send the message.

   When the recipient receives the message it will contain the text

   From: ***your name*** **on behalf of** ***manager's name***.

To Accept Task Requests and Meetings as a Delegate

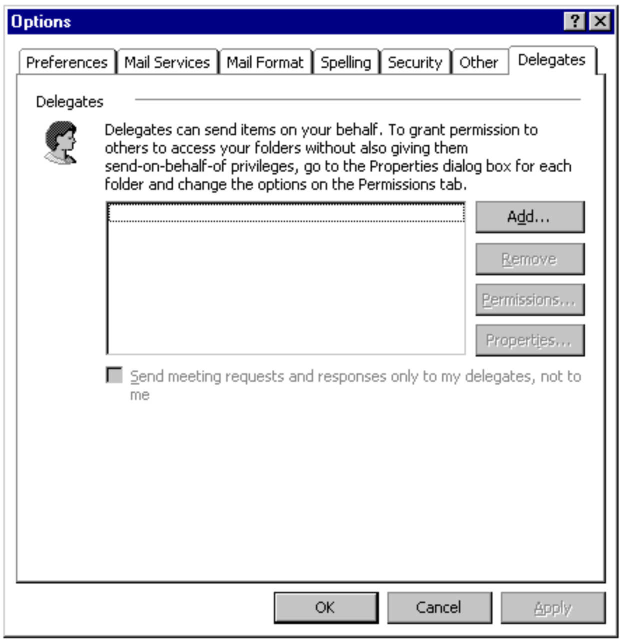
1. Open the mail message containing the request in the manager's **Inbox** folder.
2. Click the **Accept** button then choose to **Send the response now**.

   The task or appointment will be added to the manager's task list or calendar.

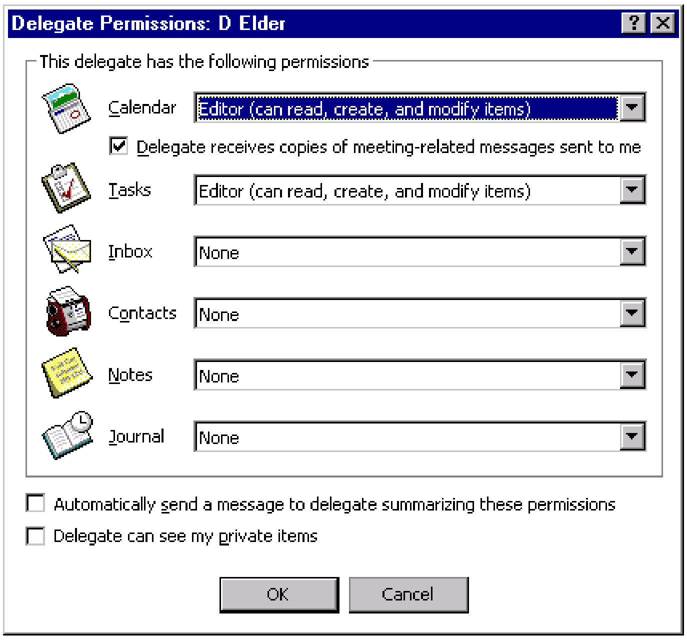
Exercise 8-2

In this exercise, you'll give delegate access to one of your co-workers.

1. Select the **Tools, Options** command then display the **Delegates** property sheet.



2. Click the **Add** button to display your address book then, if you're working with others, choose one of them. Otherwise, choose another user. Click **OK**.



Exercise 8-2

3. Choose **Editor** from the **Calendar** drop-down list.

   This user will now be able to read any items in your calendar (except those you've marked as *private*, where the detail of the appointment will be hidden), create new and edit existing appointments.

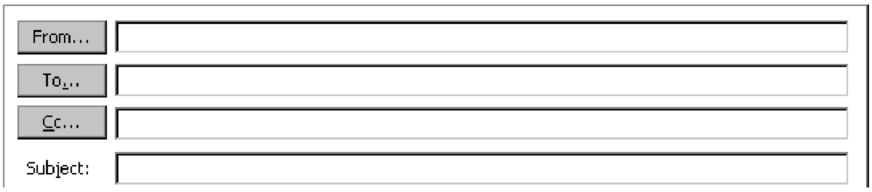
4. Choose **Reviewer** from the **Inbox** drop-down list.

   This user will now be able to read your incoming mail messages.

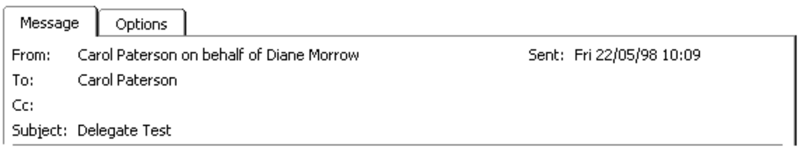
5. Click **OK**.

6. If you're working with others, follow the instructions below to send mail on behalf of another user.
   - — Compose a new mail message.
   - — Select the **View, From Box** command.

     The **From** text box is added to the message.



   - — Address the message to yourself.
   - — In the **From** text box, type the name of the user who added you as a delegate.
   - — Enter a **Subject** of **Delegate Test**.
   - — Send the message.
   - — When you receive the message, open it to see that it's been sent *on behalf of* the other user:



   - — Close the message.

Scheduling a Meeting

The *meeting planner* can be used to view your own and other users' free and busy times so that you can choose the best time to request a meeting. It also has an *AutoPick* function that will help you find a suitable time slot for everyone involved.

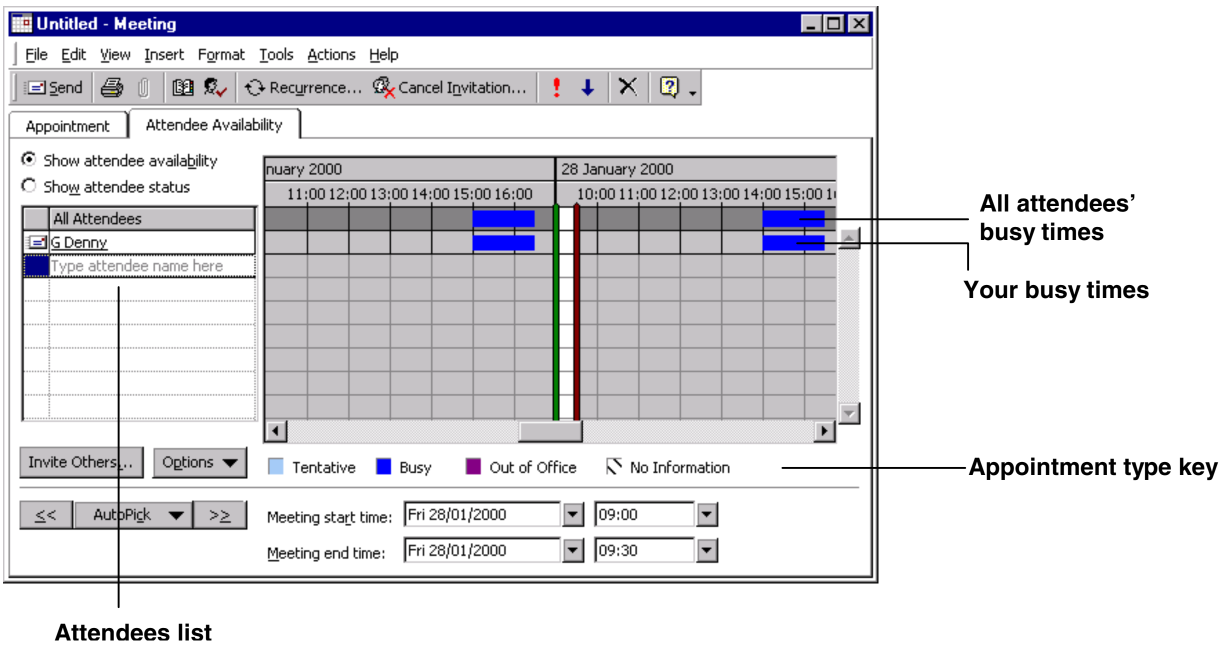
There are two ways to access the meeting planner: you can use the **Actions, Plan a Meeting** menu option when the calendar is displayed, or you can use the **File, New, Meeting Request** command. The first method displays the meeting planner from which you can view the schedules of those users you want to invite to the meeting and find a time slot that suits everyone. You can also choose to mail the attendees with the details of the meeting and ask for a response. The mail message that will be displayed is the same as that displayed by the **Calendar, New Meeting Request** command, except that some of the details will already be filled in.

To Plan a Meeting

1. Display the calendar.
2. Select the **Actions, Plan a Meeting** menu option or choose the **File, New, Meeting Request** menu option.

   If you select the **Action, Plan a Meeting** option, the meeting planner will be displayed. If you select the **File, New, Meeting Request** option, a new mail message will be displayed. When you click the **Attendee Availability** tab at the top of this message, the following meeting planner will be displayed.

   Your name will be filled in as the only attendee so far and your schedule will be displayed. Different types of appointment will be shown in different colours as specified in the key below the grid.



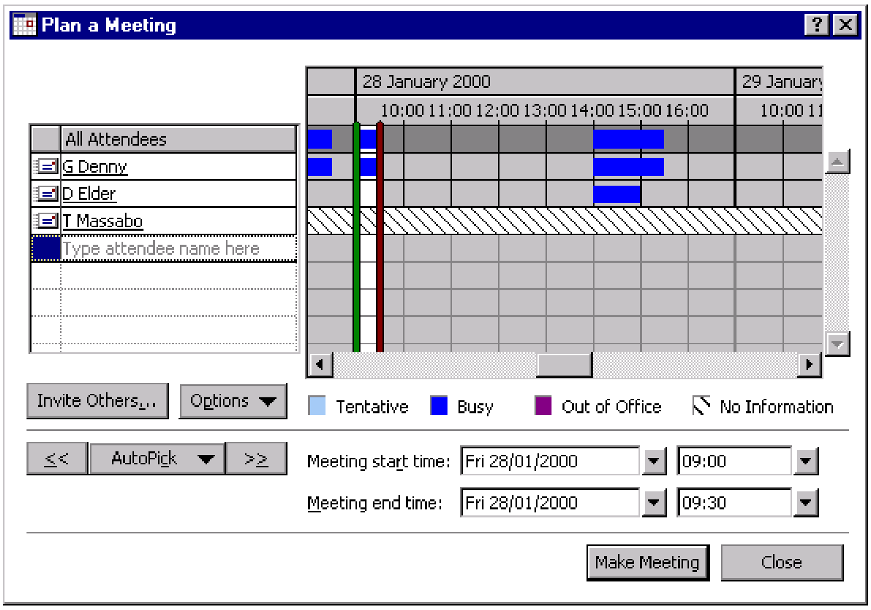
Scheduling a Meeting

../ To Plan a Meeting

3. In the attendees list, type the name(s) of the other user(s) you want to invite to the meeting or use the **Invite Others** button to display your address book and choose the required user(s). /..

   The schedules of the other attendees will be shown in the meeting planner.

   Note: For users who don't keep their schedule up-to-date, a bar will be shown in the grid. In the illustration below, the user **T Massabo** doesn't keep track of her appointments using the calendar, and **G Denny's** and **D Elder's** appointments are shown.



4. Choose the dates and times you want the meeting to start and end at from the **Meeting start time** and **Meeting end time** drop-down lists. Alternatively, use the **AutoPick** arrows to find the next available time. You can click on the **AutoPick** button to choose which resources to find a suitable time for.

5. When you have found a time that suits you, click the **Make Meeting** button to create a mail message inviting the attendees to the meeting.

   The mail message will be addressed to the attendees that you selected in the meeting planner and the start and end times will be filled in.

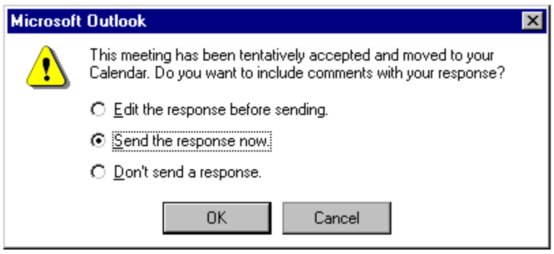
   Note: If you want to change the attendees or the date or time of the meeting, click the **Planner** tab to display the meeting planner again and make the required changes as described in the previous steps.

6. Complete the message and send it.

Replying to a Meeting Request

When you open a meeting request that you have received, three buttons will appear on the toolbar: **Accept**, **Decline** and **Tentative**. If you will attend the meeting, click **Accept**; if you won't attend the meeting click **Decline**, and if you're not sure if you can make it, click **Tentative**, you will be able to accept or decline the meeting when you know if you can go.

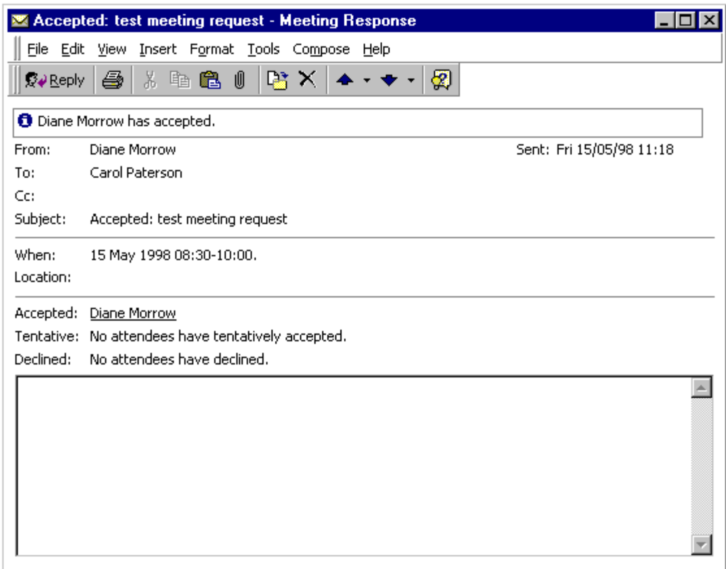
When you click one of these buttons, you'll be asked if you want to send the response straight away, if you want to edit it first to add your own comments, or if you don't want to send a response.



Choose the appropriate option then click **OK**. If you choose to edit your response you'll be presented with a mail message form. Complete this with your comments then send it.

Tracking Responses

If you send a meeting request to other users and want to see the responses that they've sent, open one of the replies that you've received. This will contain the response from the sender of the message and a summary of the other replies to the request.

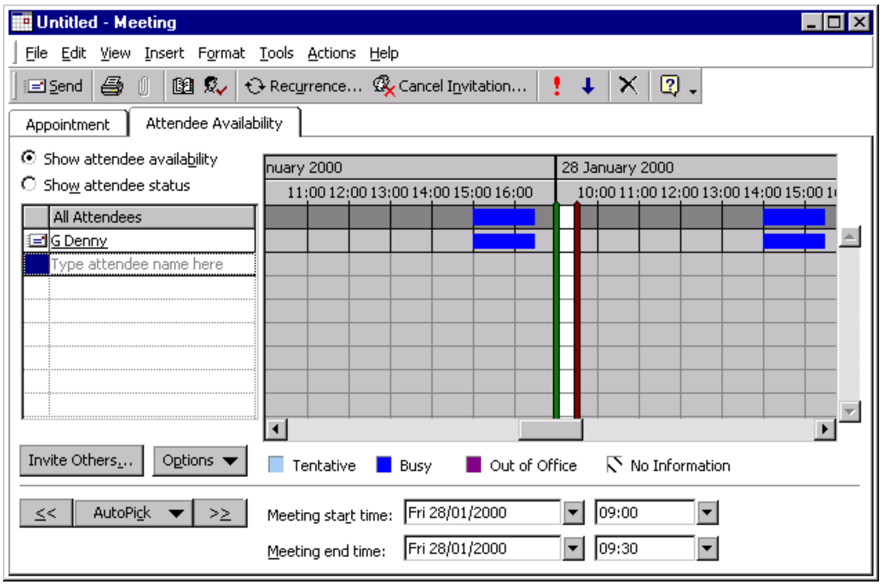


Exercise 8-3

In this exercise you'll create and send a meeting request to some of your colleagues.

1. Display your calendar and then select the **Actions, Plan a Meeting** button shown on the toolbar.

   Your schedule is shown in the meeting planner.



2. Click the **Invite Others** button and choose one or two of your colleagues to invite to the meeting.

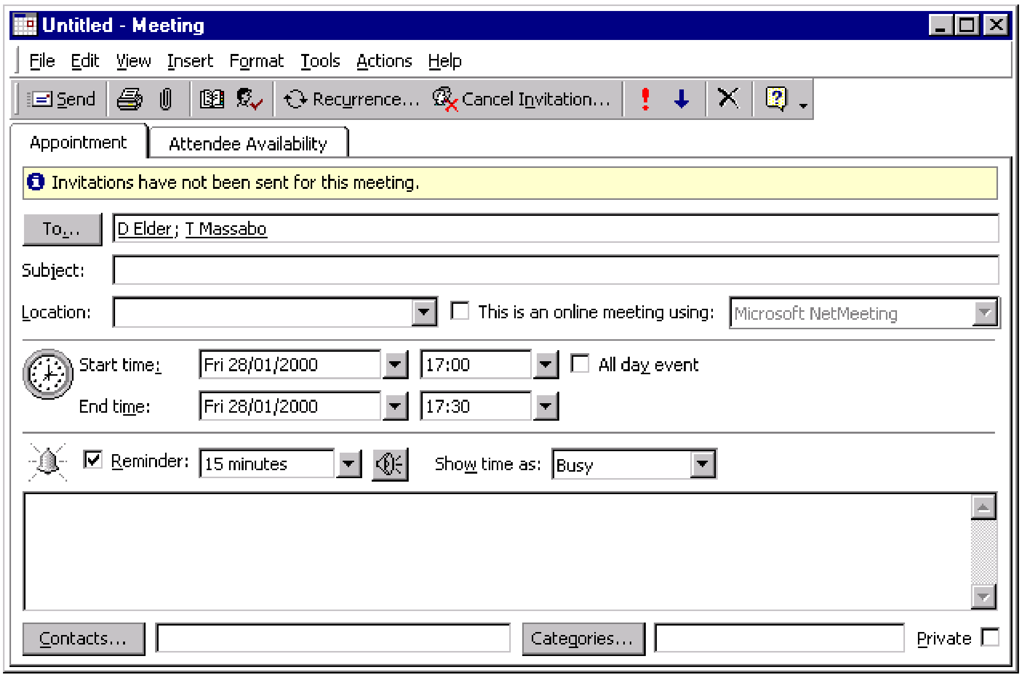
   These users' schedules are added to the grid.

3. Use the **AutoPick** arrows to find a time that suits all the attendees.

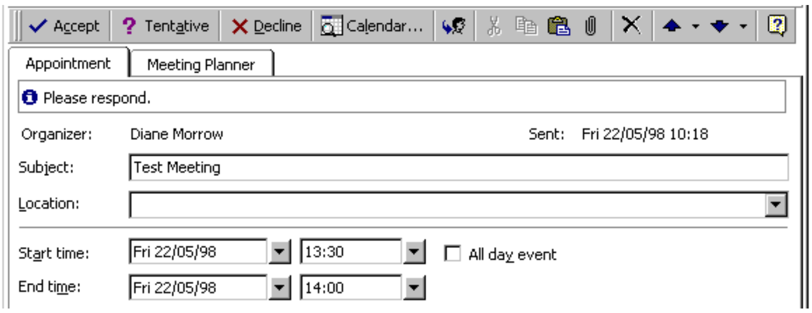
4. Click the **Make Meeting** button to display a mail message addressed to the attendees you chose in the meeting planner.

Exercise 8-3

Remember that the recipient(s) of your meeting request will not be the same as those shown below.



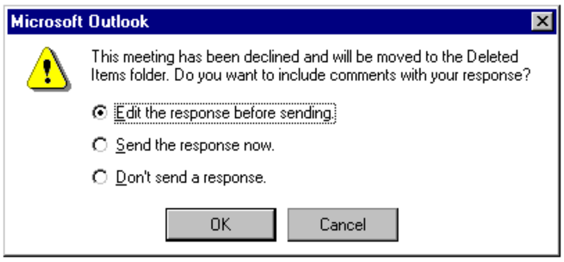
5. In the **Subject** text box, type **Test meeting request**.
6. Send the message.
7. Check your calendar to see that this meeting has been added on the date that you chose in the meeting planner.
8. If you're working with others, follow the instructions below to open and respond to the meeting request that you've received.
   — Open the message that you've received.



Notice the three buttons **Accept**, **Tentative** and **Decline** on the toolbar.

Exercise 8-3

— As you already have a meeting at this time, click the **Decline** button. The following prompt is displayed.



— Choose to **Send the response now** then click **OK**.

— Open and read the response you receive from the invitation you sent.

Assigning Tasks to others

In addition to creating tasks to add to your own task list, you can use Outlook to assign tasks to other users. For example, you may wish to have your assistant make arrangements for a trip you're planning. The person you send the task to has the choice of accepting the task, which will then be added to their task list; declining the task, in which case it will be returned to you to either reassign or add to your own task list; or they can pass the task on to another user, in which case you will be informed.

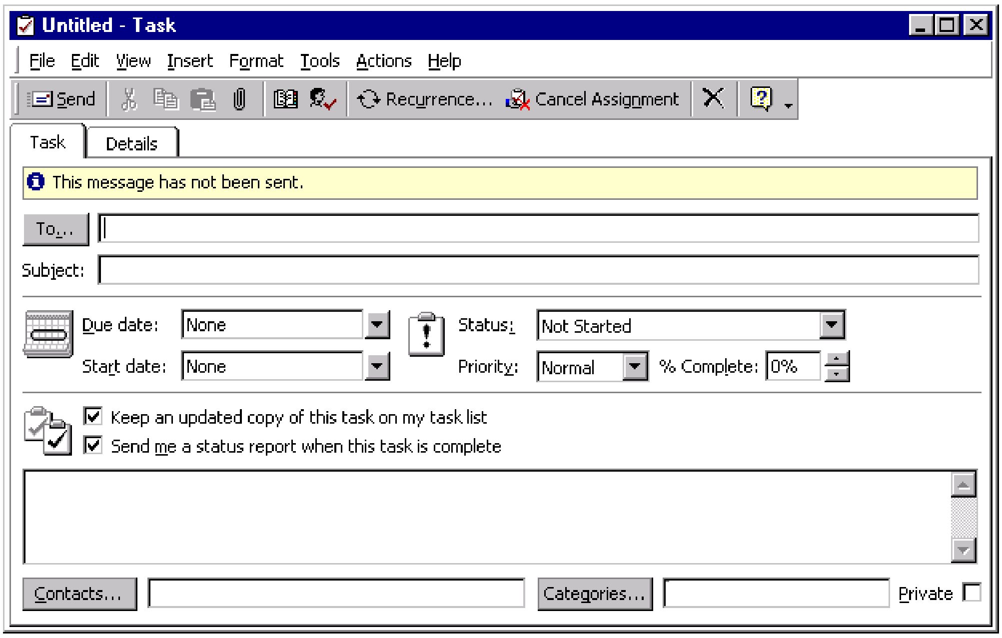
When another user accepts a task you assign them, you can track the progress of that task. Although the other user becomes the owner of the task and so is the only one who can make changes to it, you, as the creator of the task, can ask for status reports to keep your copy of the task up-to-date.

You can either create a new task to assign or you can assign an existing task from your own task list.

To Assign a New Task

1. Display your task list then choose the **File, New, Task Request** menu option.

   A mail message will be displayed.



2. Address the message to the person to whom the task is to be assigned.
3. Complete the details of the task, including any recurrence details that are appropriate. /..

Assigning Tasks to others

../ To Assign a New Task

4. If you want the task to be updated in your own task list so that you can track its progress, activate the **Keep an updated copy of this Task on my Task List** check box.
5. If you want to receive a report when the task is complete, activate the **Send me a status report when this task is complete** check box.
6. Add any comments or instructions in the list box.
7. Send the request.

Note: When you receive a task request, you can choose to accept it, adding it to your own task list; decline it, returning it to the originator; or pass it on to another user. The mail message containing the request will contain **Accept** and **Decline** buttons.

To pass the message onto another user, follow the instructions in the next part of this section.

To Assign a Task from an Existing Message

1. Display your **Inbox** folder and ensure that you can see the message in the Information viewer.
2. Ensure that the **Tasks** folder is visible in the Outlook bar.
3. Drag the message from the Information viewer and drop it on the **Tasks** folder icon.

   A task request containing the details of the original message/task will be displayed.
4. Complete the details as required then send the request.

Tracking Task Request Responses

When a user to whom you've assigned a task accepts or declines it you'll receive a mail message telling you of their decision. If they pass the task on, you'll receive a copy of the responses the new assignee makes.

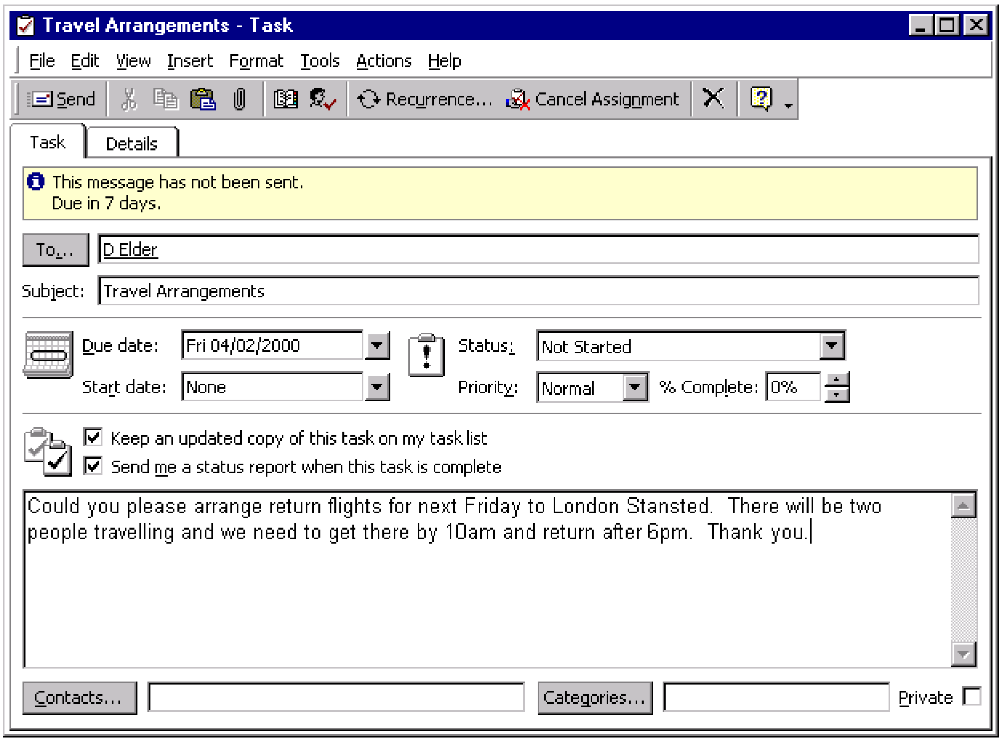
Tracking Task Progress

Once the assignee has accepted a task and has become the new owner, you'll receive updates telling you how the task is progressing. To find out the current status of a task you've assigned, open the message you received from the person you assigned the message to. The message will give the overall status of the task, while the **Status** property sheet will give you the precise progress details.

Exercise 8-4

In this exercise you'll create a task request for one of your colleagues.

1. Display your **Tasks** folder then choose the **File, New, Task Request** command.
2. Address the task to one of your colleagues.
3. Type a **Subject** of **Travel Arrangements** and enter a **Due Date** of **next Friday**.
4. Ensure that the **Keep an updated copy...** and **Send me a status report...** check boxes are activated.
5. Complete the task request as shown below (remember that your *next Friday* will be a different date from that shown in the illustration):

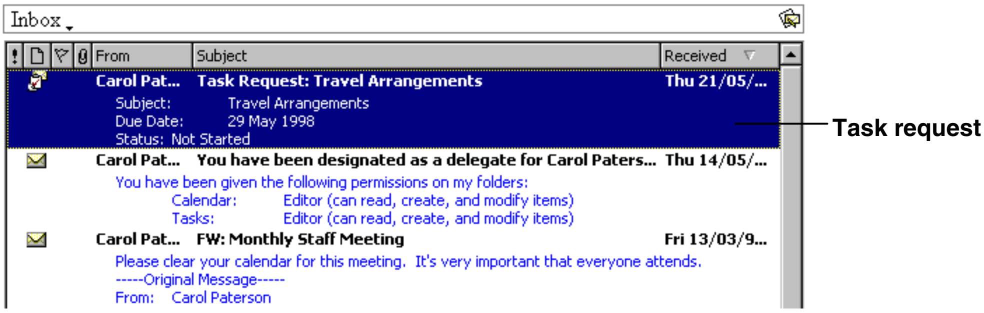


6. Send the task request.

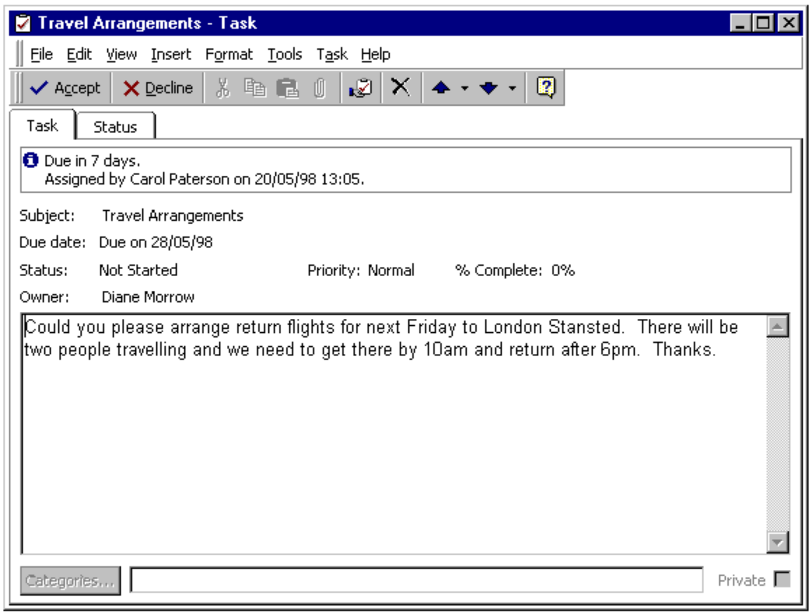
Exercise 8-4

7. If you're working with others, follow the instructions below to view and reply to the task request that you've received then to update it and send a status report on its progress.

— Display your **Inbox** folder to see the task request that you received.



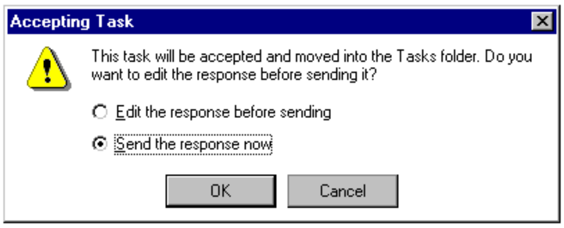
— Open this message.



Notice the **Accept** and **Decline** buttons shown on the toolbar.

— Choose to **Accept** the task.

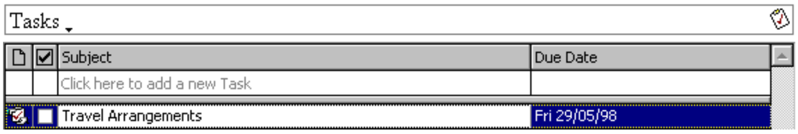
The following prompt is displayed.



Exercise 8-4

— Ensure that the **Send the response now** radio button is selected then click **OK**.

— View your task list to see that the task has been added to it.



— Open the task by double clicking on it.

— Select **In Progress** from the **Status** drop-down list then save and close the task.

9. If you are working with others, you will have received a mail message informing you that the user you assigned the task to has accepted it and another detailing the progress of the task you assigned. Open these messages and read them.

Questions and Answers

1. How would you specify that a folder is to be shared with another user?

2. Which command would you use to add another mailbox to your folders list?

3. Describe how you would name another user as a delegate to your folders.

4. Which text box must you add to a mail message to send mail on behalf of another user?

5. Give one method of accessing the meeting planner.

6. Once a task has been accepted, who is the owner of the task?

Index

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z