



Microsoft Outlook 2013 Part 2: Intermediate Outlook

Spring 2015, Version 1.0


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Introduction

Microsoft Outlook 2013 is a great tool for communication, time and information management, and collaboration. It is used to send and receive email messages as well as manage your schedule, contacts, and tasks. To minimize the work of dealing with such diverse items, Outlook provides a module for each item type and presents each module in a similar interface, allowing you to work with different items in a consistent way. This handout covers working with the calendar, contacts, and tasks, as well as managing your mailbox.

Calendar

The *Calendar* module  allows you to schedule and track appointments and meetings. You can view your calendar in several different formats (*Day*, *Work Week*, *Week*, *Month*, and *Schedule View*) by using the buttons in the *Arrange* group on the *Home* tab of the *Ribbon*.

The *Date Navigator* is a small calendar at the top of the Folder pane that can be used to navigate from one date to another. The current date is highlighted with a dark blue background. Days that contain scheduled items appear in bold type; days with no scheduled items appear as regular text. You can use the left and right arrows at the top of the Date Navigator to scroll to another month.

To display the Calendar module:

1. On the **Navigation** bar, click **Calendar** (see Figure 1).

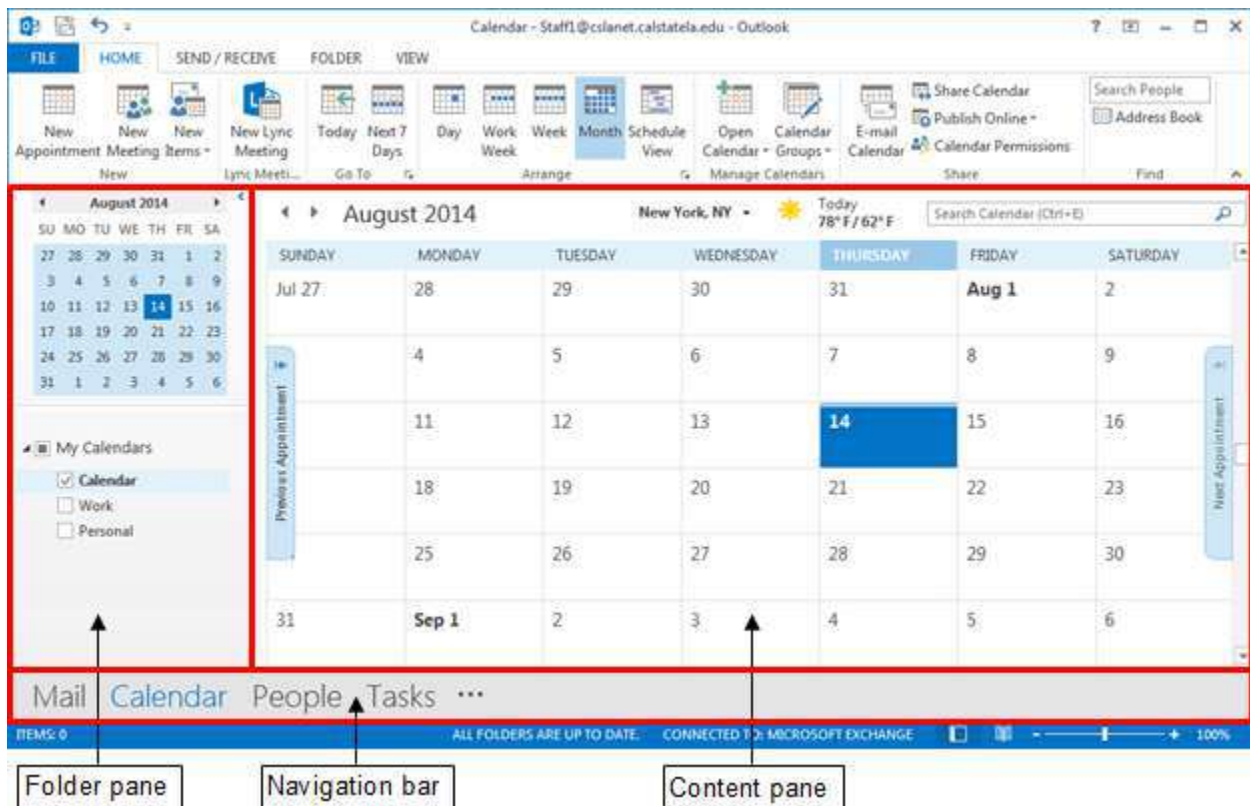



Figure 1 – Outlook 2013 Program Window Displaying the Calendar Module

Scheduling Appointments

Appointments are activities that you schedule in your calendar that do not involve inviting other people. You can schedule one-time appointments or recurring appointments.

To schedule an appointment:

1. In the **Calendar** module, on the **Home** tab, in the **New** group, click the **New Appointment** button . The **Appointment** window opens (see Figure 2).

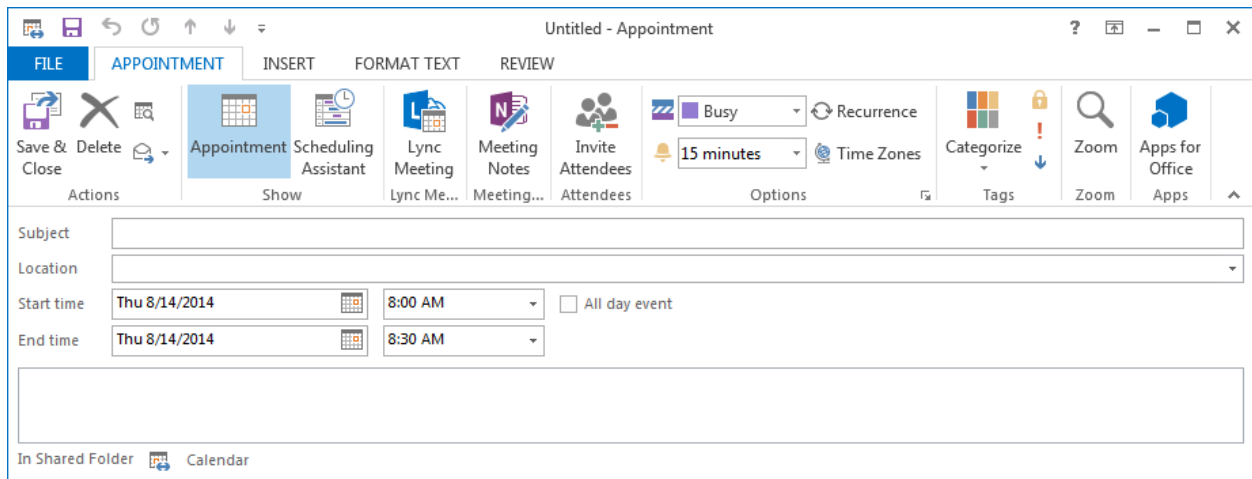




Figure 2 – Appointment Window

2. In the **Subject** box, type a short description for the appointment.
3. In the **Location** box, type a location for the appointment.
4. In the **Start time** and **End time** boxes, enter the desired dates and times.
5. By default, Outlook adds a 15-minute reminder to appointments. To change when the reminder appears, on the **Appointment** tab, in the **Options** group, click the **Reminder** arrow  **15 minutes** and select the desired time from the list.

NOTE: If you want to create a recurring appointment, on the **Appointment** tab, in the **Options** group, click the **Recurrence** button  to open the **Appointment Recurrence** dialog box, set the recurrence pattern and range of recurrence, and then click the **OK** button (see Figure 3).

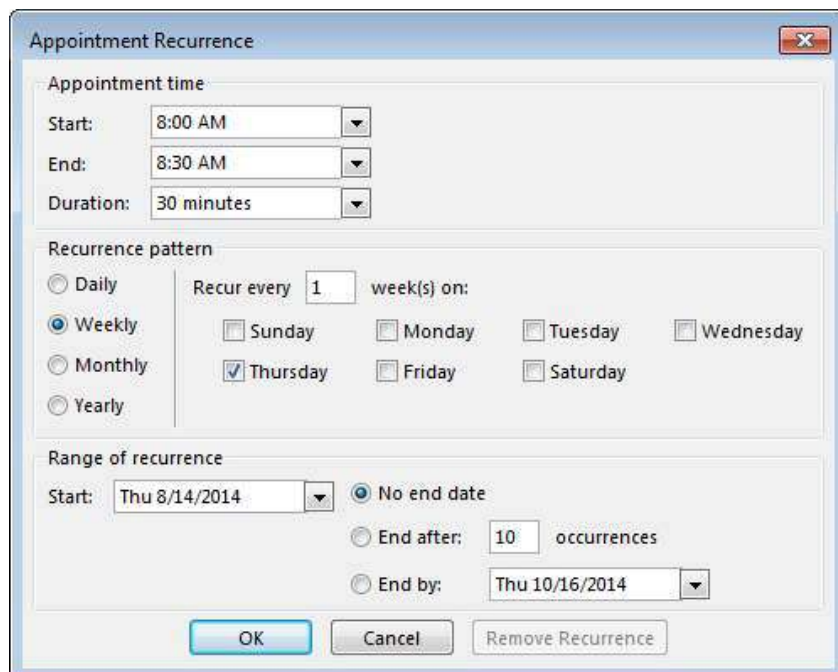


Figure 3 – Appointment Recurrence Dialog Box

6. On the **Appointment** tab, in the **Actions** group, click the **Save & Close** button .

Updating or Deleting Appointments

If the information about an appointment has changed since it was scheduled, you can update the appointment. You can also delete an appointment and remove it from your calendar. When you delete an appointment, Outlook moves it to the Deleted Items folder.

NOTE: When working with one-time appointments, the *Calendar Tools Appointment* tab becomes available on the Ribbon; when working with recurring appointments, the *Calendar Tools Appointment Series* tab becomes available on the Ribbon.

To update an appointment:

1. In the **Calendar** module, in the **Content** pane, double-click the appointment that you want to update. The appointment opens in the **Appointment** window.


NOTE: If you double-click a recurring appointment, the **Open Recurring Item** dialog box opens. Select the **Just this one** option to update only that appointment or **The entire series** option to update every appointment in the series, and then click the **OK** button (see Figure 4).



Figure 4 – Open Recurring Item Dialog Box

2. Make the desired changes.
3. On the **Appointment** tab, in the **Actions** group, click the **Save & Close** button .

To delete an appointment:

1. In the **Calendar** module, in the **Content** pane, select the appointment that you want to delete.
2. Under **Calendar Tools**, on the **Appointment** tab, in the **Actions** group, click the **Delete** button .

NOTE: If you are deleting a recurring appointment, click the **Delete** button in the **Actions** group on the **Appointment Series** tab, and then click **Delete Occurrence** to delete only that appointment or **Delete Series** to delete every appointment in the series (see Figure 5).

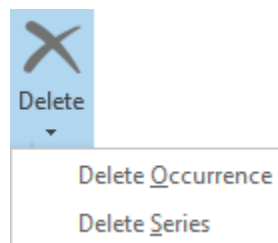



Figure 5 – Delete Menu

Scheduling Meetings

Meetings are appointments to which you invite other people. You can schedule one-time meetings or recurring meetings. Responses to your meeting request appear in your Inbox folder.

To schedule a meeting:

1. In the **Calendar** module, on the **Home** tab, in the **New** group, click the **New Meeting** button . The **Meeting** window opens (see Figure 6).

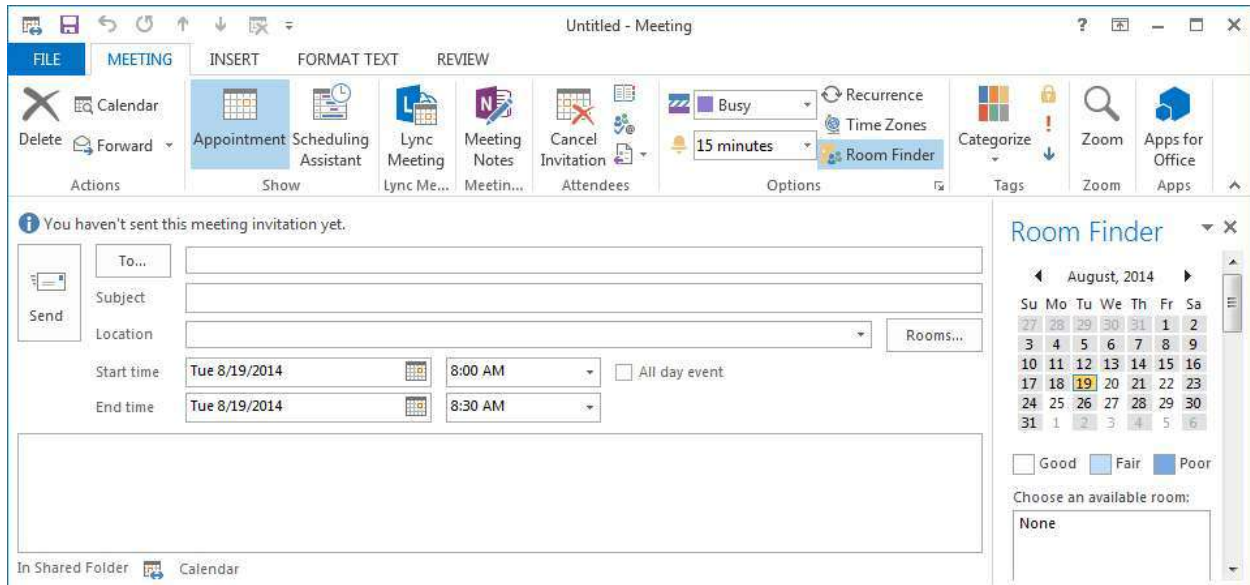


Figure 6 – Meeting Window

2. In the **To** box, type the email address of each person that you want to invite to the meeting. Separate multiple entries with a semicolon (;).

NOTE: You can also add attendees by clicking the **To** button to open the **Select Attendees and Resources** dialog box, locating and selecting each person that you want to invite to the meeting, clicking the **Required** button if the person must attend or the **Optional** button if the person is not required to attend, and then clicking the **OK** button (see Figure 7).

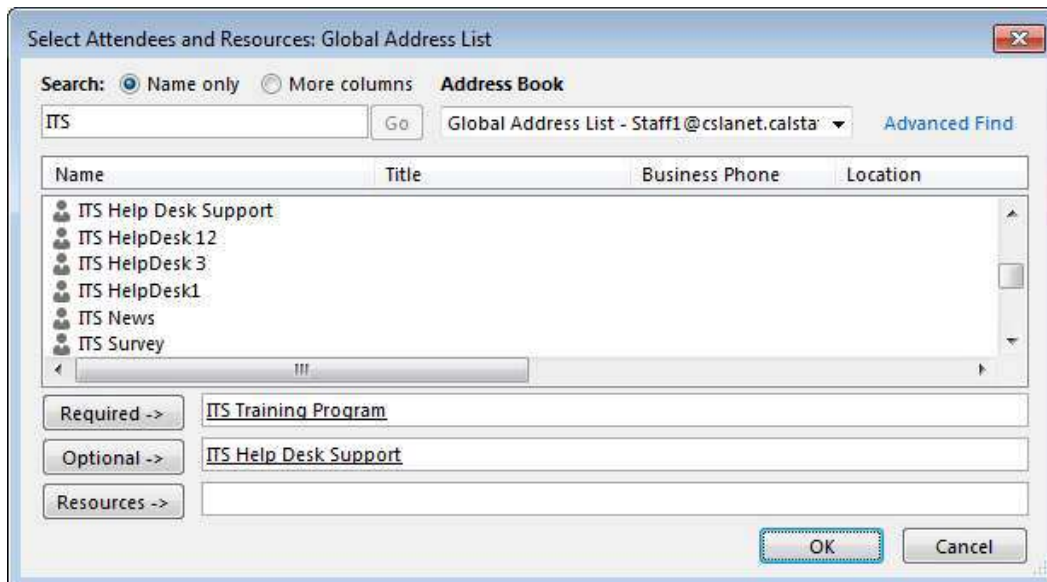




Figure 7 – Select Attendees and Resources Dialog Box

NOTE: After you add all the attendees, you can use the **Scheduling** page of the **Meeting** window to check their availability (see Figure 8). This can help you find the best time for the meeting. To switch to the **Scheduling** page, click the **Scheduling Assistant** button  in the **Show** group on the **Meeting** tab of the **Ribbon**. To switch back to the **Appointment** page, click the **Appointment** button  in the **Show** group on the **Meeting** tab of the **Ribbon**.

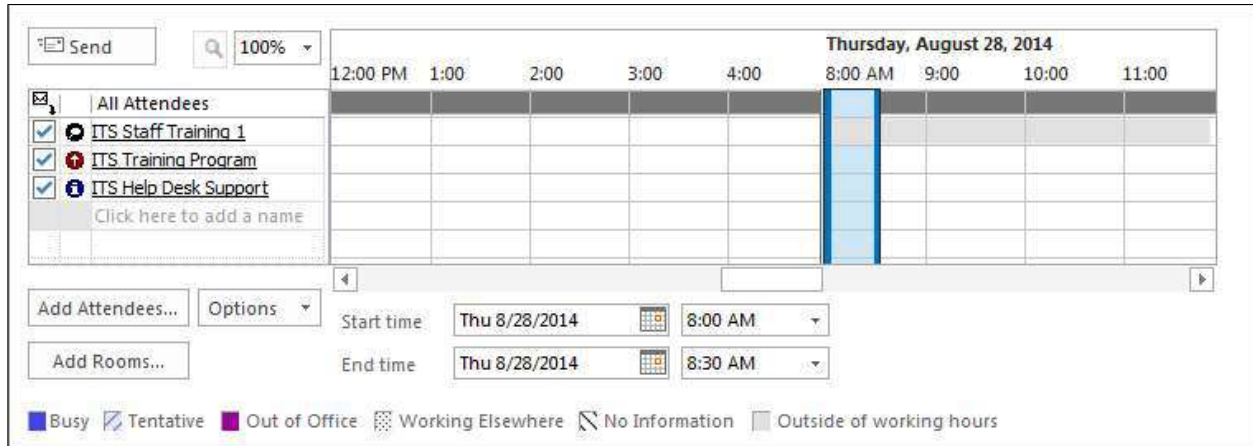





Figure 8 – Scheduling Page of the Meeting Window

3. In the **Subject** box, type a short description for the meeting.
4. In the **Location** box, type a location for the meeting.
5. In the **Start time** and **End time** boxes, enter the desired dates and times.
6. In the **Notes** box, type any information you want to share with the attendees.
7. To add an attachment, on the **Insert** tab, in the **Include** group, click the **Attach File** button  to open the **Insert File** dialog box, locate and select the file that you want to attach, and then click the **Insert** button.
8. By default, Outlook adds a 15-minute reminder to meetings. To change when the reminder appears, on the **Meeting** tab, in the **Options** group, click the **Reminder** arrow  **15 minutes** and select the desired time from the list.

NOTE: If you want to create a recurring meeting, on the **Meeting** tab, in the **Options** group, click the **Recurrence** button  to open the **Appointment Recurrence** dialog box, set the recurrence pattern and range of recurrence, and then click the **OK** button (see Figure 3).

9. Click the **Send** button to send the meeting request and add the meeting to your Outlook calendar.

Updating or Cancelling Meetings

After you send a meeting request, you might find it necessary to change the date, time, or location of the meeting. As the meeting organizer, you can make changes to the meeting request, including adding or removing attendees, or cancelling the meeting. When you cancel a meeting, it is removed from your Outlook calendar.

NOTE: When working with one-time meetings, the *Calendar Tools Meeting* tab becomes available on the **Ribbon**; when working with recurring meetings, the *Calendar Tools Meeting Series* tab becomes available on the **Ribbon**.

To update a meeting:

1. In the **Calendar** module, in the **Content** pane, double-click the meeting that you want to update. The meeting opens in the **Meeting** window.

NOTE: If you double-click a recurring meeting, the **Open Recurring Item** dialog box opens. Select the **Just this one** option to update only that meeting or **The entire series** option to update every meeting in the series, and then click the **OK** button (see Figure 9).




Figure 9 – Open Recurring Item Dialog Box

2. Make the desired changes.
3. Click the **Send Update** button to send an update to the meeting attendees.

To cancel a meeting:

1. In the **Calendar** module, in the **Content** pane, double-click the meeting that you want to cancel. The meeting opens in the **Meeting** window.




NOTE: If you double-click a recurring meeting, the **Open Recurring Item** dialog box opens. Select the **Just this one** option to cancel only that meeting or **The entire series** option to cancel every meeting in the series, and then click the **OK** button (see Figure 9).

2. On the **Meeting** tab, in the **Actions** group, click the **Cancel Meeting** button .
3. In the **Notes** box, type any information you want to share with the attendees (e.g., the reason you are cancelling the meeting).
4. Click the **Send Cancellation** button to send a cancellation notice to the meeting attendees.

Responding to Meeting Requests

Other people may invite you to meetings. Meeting requests appear in your Inbox folder. You can respond to a meeting request by accepting, tentatively accepting, or declining the request. You can also propose a new meeting time. When you accept or tentatively accept a meeting request, it gets added to your Outlook calendar.

To respond to a meeting request:

1. In the **Mail** module, in the **Content** pane, select the meeting request to which you want to respond.
2. In the **Reading** pane, click the **Accept** button , the **Tentative** button , or the **Decline** button  (see Figure 10).
3. On the menu that appears, click **Edit the Response before Sending** (which allows you to send a message with the response), **Send the Response Now** (which sends the default response), or **Do Not Send a Response**.

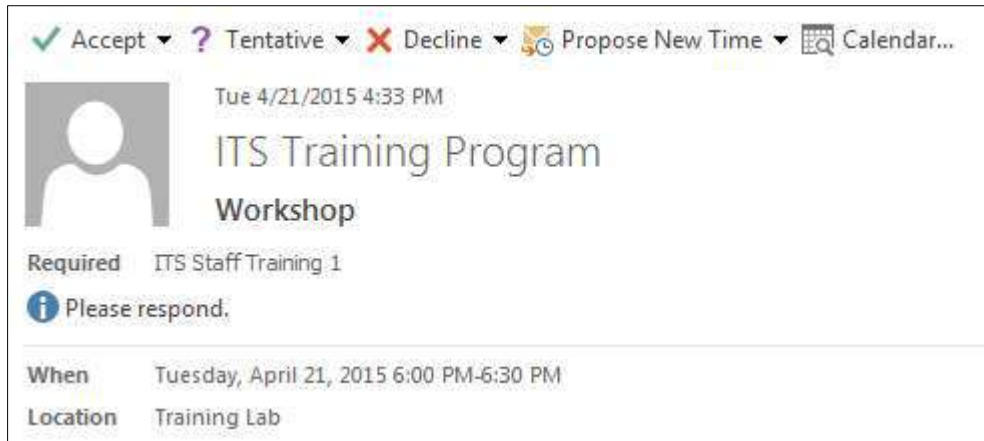



Figure 10 – Meeting Invitation

People

The *People* module  allows you to store information about the people you regularly communicate with (such as their name, email address, job title, street address, phone number, and any other information that relates to the contact).

In the People module, the Folder pane displays your available address books, including the default *Contacts* folder created by Outlook; the Content pane displays a list of contacts saved in the selected address book; and the Reading pane displays the available information for the selected contact.

To display the People module:

1. On the **Navigation** bar, click **People** (see Figure 11).

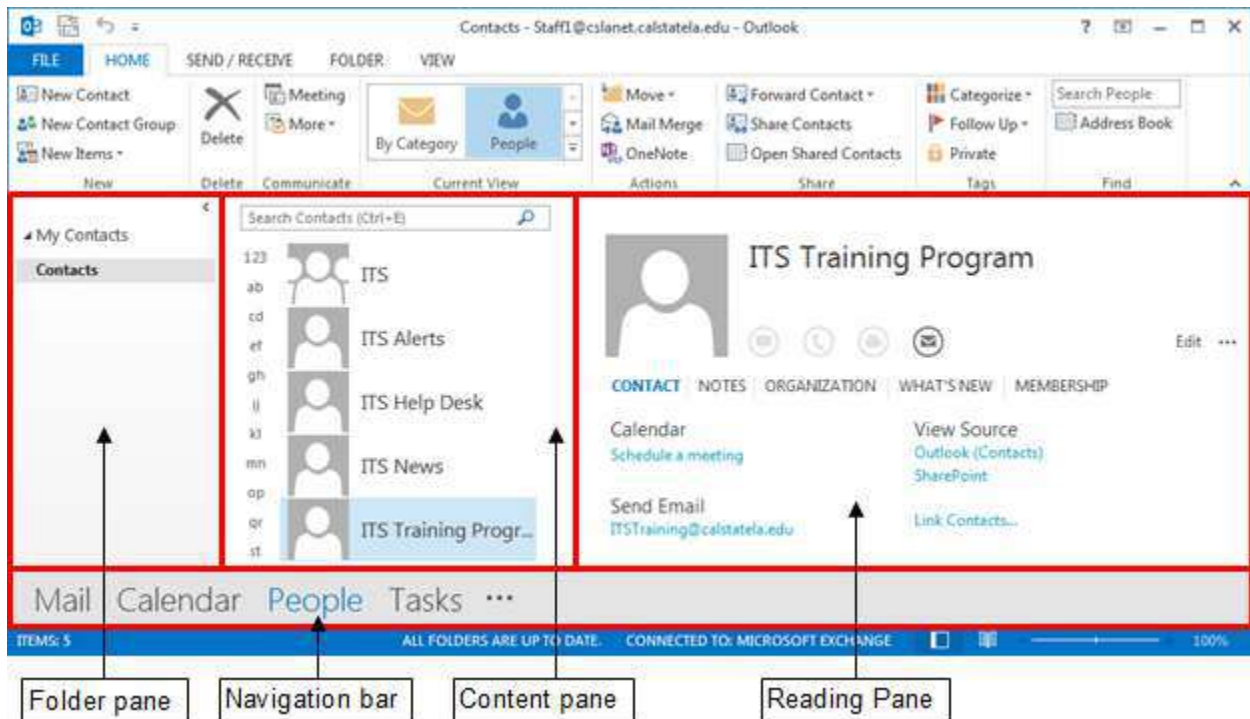



Figure 11 – Outlook 2013 Program Window Displaying the People Module


Creating Contacts


There are various ways that you can add a contact to your contacts list. You can create a new contact, add a contact from the Global Address List, or add a contact from the header of a received email message.

NOTE: The *Global Address List* is an address book that contains the names and email addresses of everyone that has a Cal State L.A. email account.

To create a contact:

1. In the **People** module, on the **Home** tab, in the **New** group, click the **New Contact** button . The **Contact** window opens (see Figure 12).
2. In the **Full Name** box, enter the contact's name.
3. In the **E-mail** box, enter the contact's email address.

NOTE: If the contact that you want to add is in the **Global Address List**, you can enter the contact's email address by clicking the **E-mail** button , locating and selecting the contact in the **Select Name** dialog box, and then clicking the **OK** button.

4. Enter any other information that you want to include for the contact.
5. On the **Contact** tab, in the **Actions** group, click the **Save & Close** button .

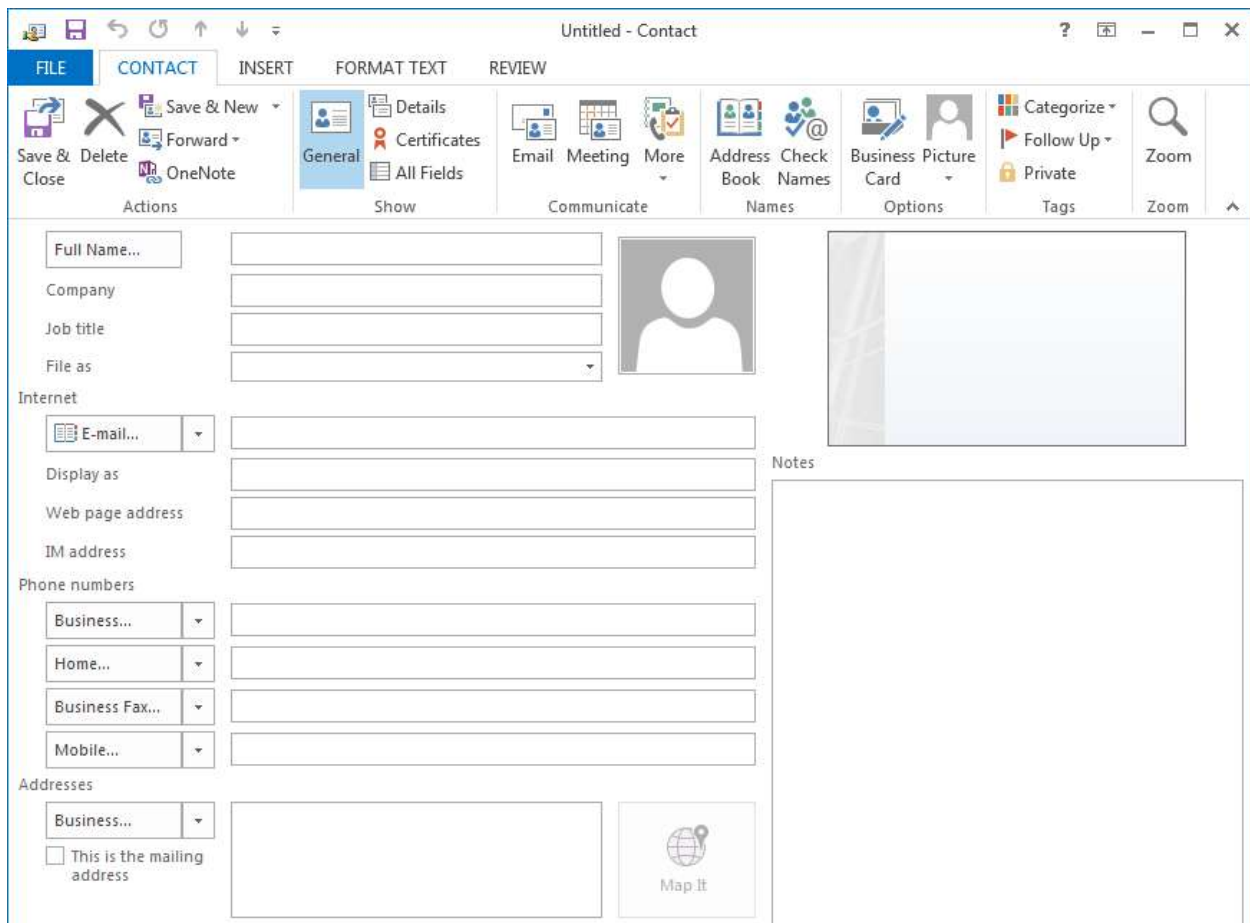


Figure 12 – Contact Window

To create a contact from an email message:

1. In the **Mail** module, in the **Content** pane, select the message that has the contact information you want to save.
2. In the **Reading** pane, right-click the name or email address that appears in the message header, and then click **Add to Outlook Contacts** on the shortcut menu. A **Contact Card** opens, with some of the contact's information already filled in (see Figure 13).

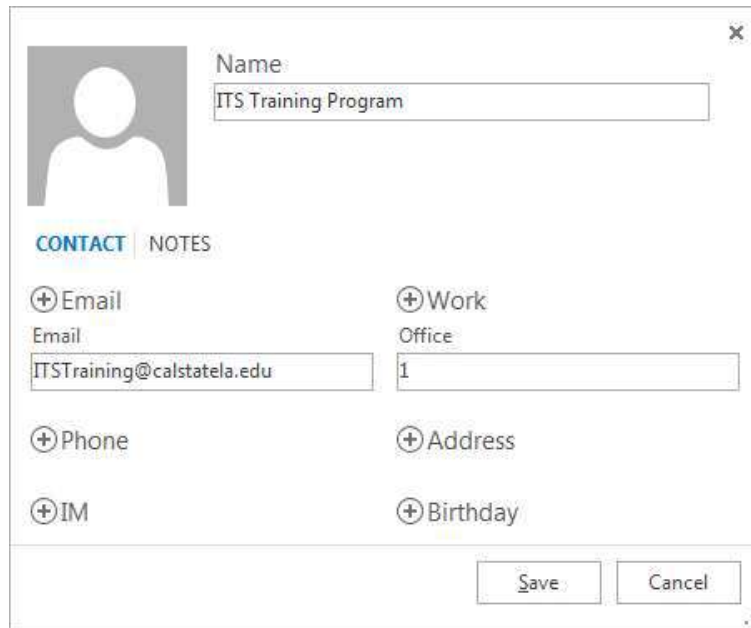



Figure 13 – Contact Card

3. Enter any other information that you want to include for the contact.


NOTE: If a field is not visible, click the **Add** button  to choose the field that you want to add.

4. Click the **Save** button to save the contact information, and then click the **Close** button  in the upper-right corner of the **Contact Card**.

Updating Contacts

If the information about a contact has changed since it was created, you can update the contact.


To update a contact:

1. In the **People** module, in the **Content** pane, double-click the contact that you want to update. A **Contact Card** opens.
2. Make the desired changes.
3. Click the **Save** button to save the changes, and then click the **Close** button  in the upper-right corner of the **Contact Card**.

Deleting Contacts

When you delete a contact, Outlook moves it to the Deleted Items folder.


To delete a contact:

1. In the **People** module, in the **Content** pane, select the contact that you want to delete.
2. On the **Home** tab, in the **Delete** group, click the **Delete** button .

Creating Contact Groups

A *contact group* (also known as a *distribution list*) is a collection of contacts. It provides an easy way to send messages to a group of people. You can add a member to a contact group by selecting a contact from your contacts list or an address book (e.g., Global Address List), or by entering contact information in the Add New Member dialog box.

To create a contact group:

1. In the **People** module, on the **Home** tab, in the **New** group, click the **New Contact Group** button . The **Contact Group** window opens (see Figure 14).
2. In the **Name** box, type a name for the contact group. This is the name that will appear in your contacts list.

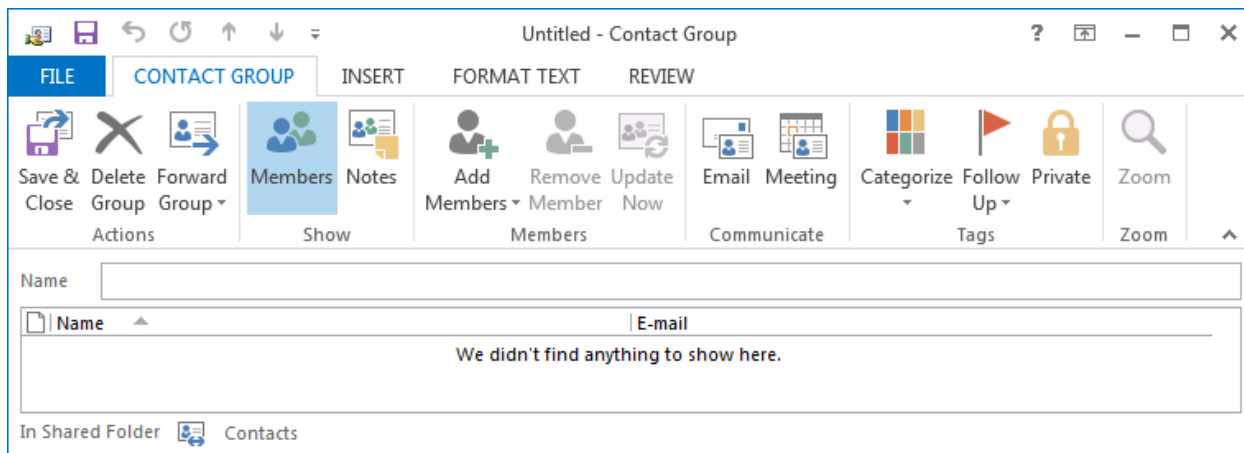


Figure 14 – Contact Group Window

3. On the **Contact Group** tab, in the **Members** group, click the **Add Members** button, and then click **From Outlook Contacts** or **From Address Book** (see Figure 15).

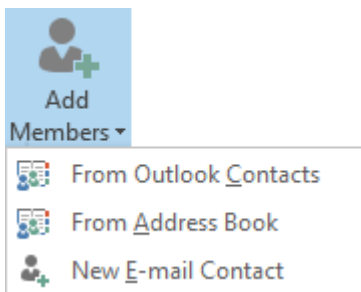


Figure 15 – Add Members Menu

4. In the **Select Members** dialog box, locate and select each contact that you want to add to the contact group, and then click the **Members** button (see Figure 16).

NOTE: You can quickly add multiple contacts to the **Members** box by double-clicking each contact. You can use the **Search** box to quickly find a contact in the selected address book. You can use the **Address Book** list to display a different address book.

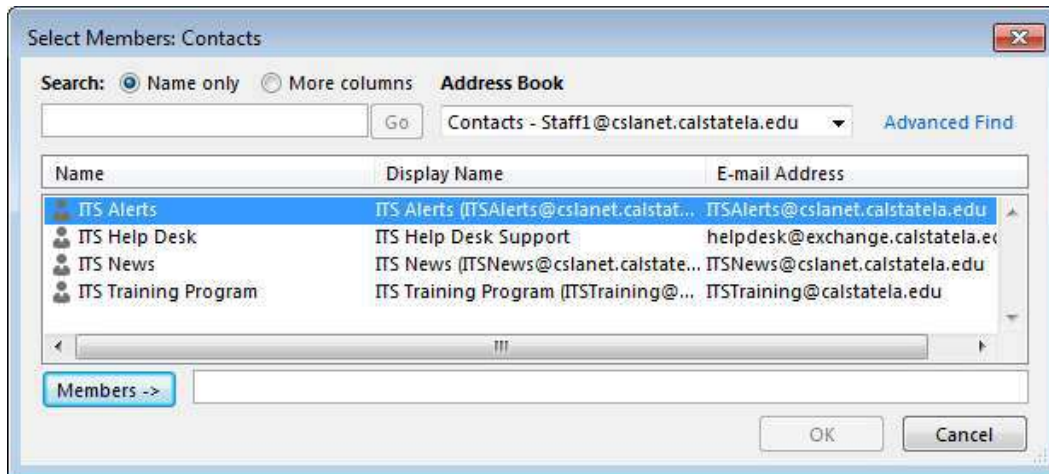


Figure 16 – Select Members Dialog Box

- When finished, click the **OK** button. Each member appears in the contact group in alphabetical order (see Figure 17).

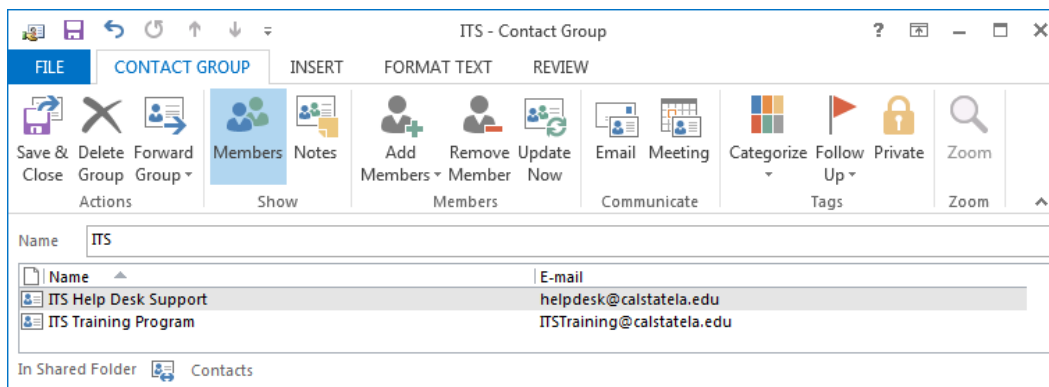





Figure 17 – Contact Group Window After Adding Members

- On the **Contact Group** tab, in the **Actions** group, click the **Save & Close** button .

To remove a member from a contact group:

- In the **People** module, in the **Content** pane, double-click the contact group that you want to edit. The **Contact Group** window opens.
- Select the member that you want to remove from the contact group.
- On the **Contact Group** tab, in the **Members** group, click the **Remove Member** button .
- On the **Contact Group** tab, in the **Actions** group, click the **Save & Close** button .

Tasks

The **Tasks** module  allows you to create and track your tasks and to-do items. A *task* is an item that you create in Outlook to track until its completion. A *to-do* item is any Outlook item (such as a task or an email message) that has been flagged for follow up. By default, all tasks are flagged for follow up when they are created, even if they have no start date or due date. Therefore, whenever you create a task or flag an email message, a to-do item is created automatically.

In the Tasks module, the Folder pane displays the tasks list variations you can display in the Content pane, including the *To-Do List* and *Tasks* folder created by Outlook. The To-Do List, which includes both tasks and flagged messages, is displayed by default. The Tasks folder includes only tasks.

To display the Tasks module:

1. On the **Navigation** bar, click **Tasks** (see Figure 18).
2. In the **Folder** pane, under **My Tasks**, click the **Tasks** folder.

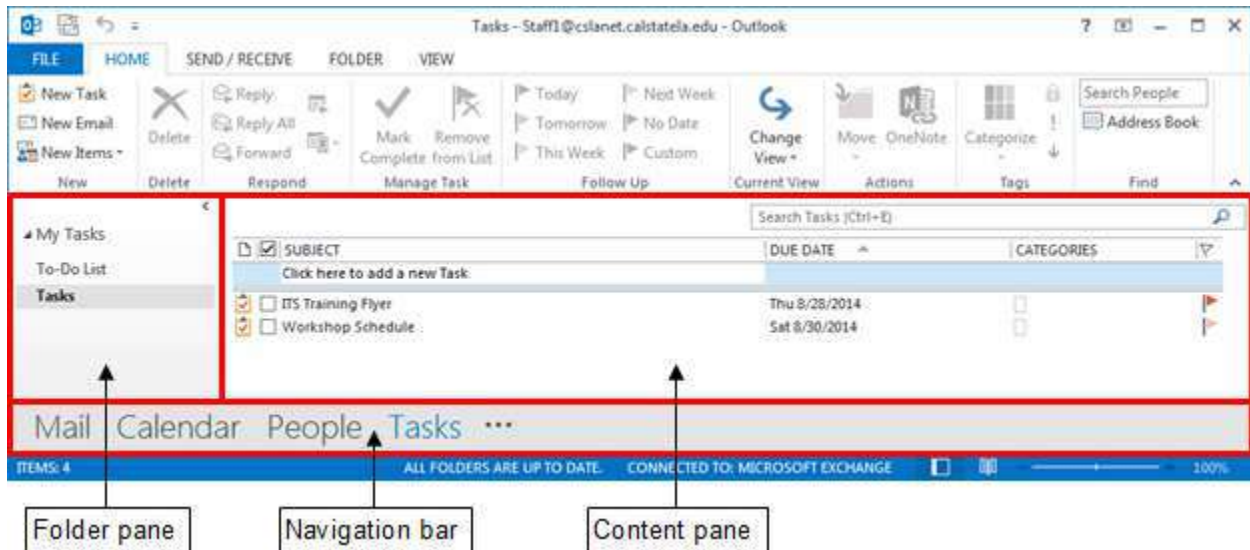


Figure 18 – Outlook 2013 Program Window Displaying the Tasks Module

Changing the View

The default view for the Tasks folder is the *Simple List* view which displays the subject, due date, categories, and flags for each task and a check box that you can select to indicate that a task has been completed. You can change the view of the Tasks folder to show only tasks that are active, only tasks that are completed, only tasks that are overdue, and so on.

To change the current view:

1. In the **Tasks** module, on the **View** tab, in the **Current View** group, click the **Change View** button and select the desired view from the menu (see Figure 19).

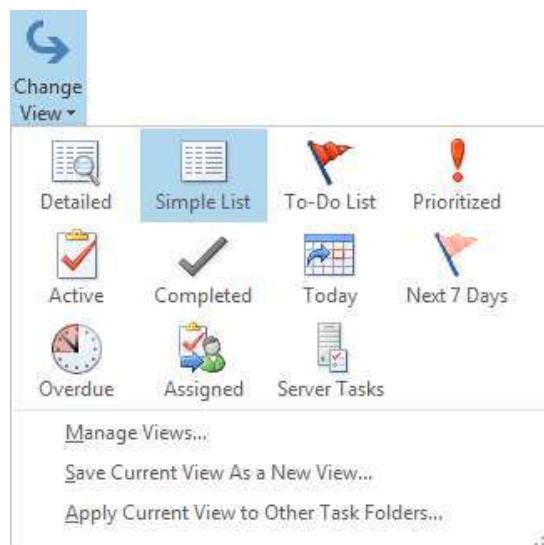



Figure 19 – Change View Menu

Creating Tasks

You can add a task to your tasks list by creating the task yourself or by accepting a task that someone else assigns to you. When creating a task, you can set a due date or leave the task open-ended. You can create one-time tasks or recurring tasks.

To create a task:

1. In the **Tasks** module, on the **Home** tab, in the **New** group, click the **New Task** button . The **Task** window opens (see Figure 20).
2. In the **Subject** box, type a short description for the task.
3. Set additional properties for the task as needed (e.g., **Start date**, **Due date**, **Status**, **Priority**, **% Complete**, **Reminder**).

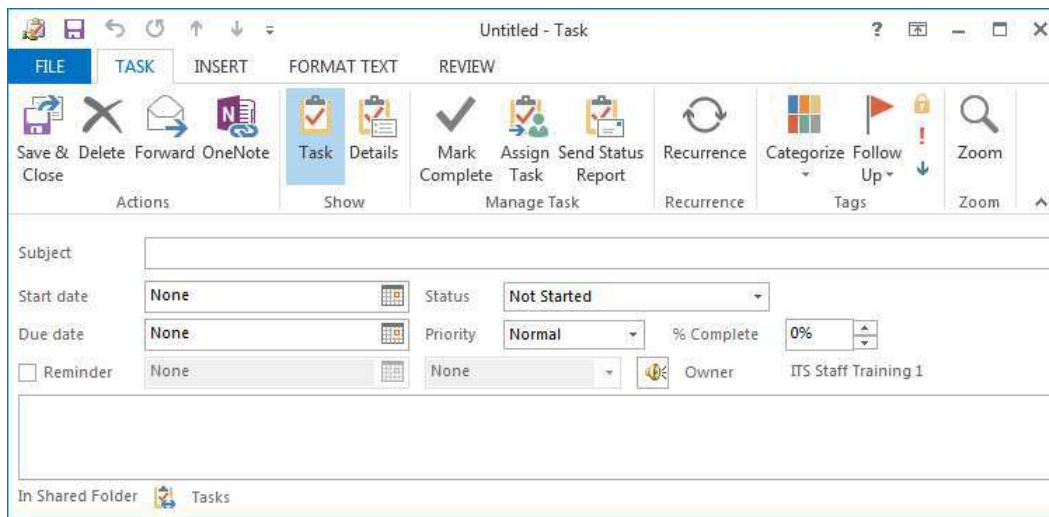



Figure 20 – Task Window

NOTE: To make the task recurring, on the **Task** tab, in the **Recurrence** group, click the **Recurrence** button  to open the **Task Recurrence** dialog box, set the recurrence pattern and range of recurrence, and then click the **OK** button (see Figure 21).

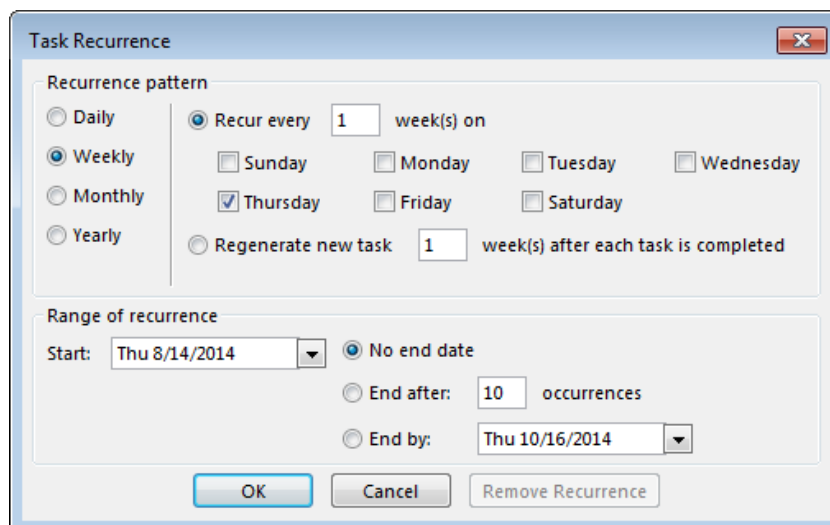



Figure 21 – Task Recurrence Dialog Box

4. On the **Task** tab, in the **Actions** group, click the **Save & Close** button .

Updating Tasks

You can update an existing task at any time by changing its properties.

To update a task:

1. In the **Tasks** module, in the **Content** pane, double-click the task that you want to update. The task opens in the **Task** window.
2. Make the desired changes.
3. On the **Task** tab, in the **Actions** group, click the **Save & Close** button .

Marking Tasks as Complete

Some tasks take only a little time to complete, whereas others can take days, weeks, or even months. When you complete a task, you can mark it as complete. Marking a task as complete retains a record of it on your tasks list. Completed tasks are visible only in certain views. Outlook displays completed tasks using strikethrough formatting (see Figure 22).

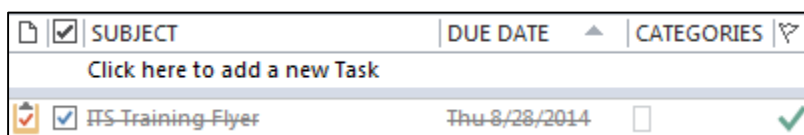



Figure 22 – Completed Task in the Tasks List

To mark a task as complete:


1. In the **Tasks** module, in the **Content** pane, select the task that you want to mark as complete.
2. On the **Home** tab, in the **Manage Task** group, click the **Mark Complete** button .

NOTE: You can also mark a task as complete by setting its **% Complete** value to **100%**.

Deleting Tasks

You can delete any task, whether or not the task is marked as complete. When you delete a task, Outlook moves it to the Deleted Items folder. No record of it remains on your tasks list.

To delete a task:

1. In the **Tasks** module, in the **Content** pane, select the task that you want to delete.
2. On the **Home** tab, in the **Delete** group, click the **Delete** button .

Managing Your Mailbox

Outlook provides several tools to help you manage your mailbox. This section covers how to search for messages, block junk mail, create rules to process messages, check the size of your mailbox, archive messages, and delegate access.

Searching for Messages

Over time, your Outlook mailbox can fill with hundreds of messages. This makes finding messages more difficult. You can use Outlook's *Search* feature to quickly locate messages that contain specific content or meet specific criteria.

In the Mail module, the Search box is located at the top of the Content pane (see Figure 23). When you click in the Search box, the *Search Tools Search* tab becomes available on the Ribbon (see Figure 24). The tools on this tab allow you to narrow down your search.

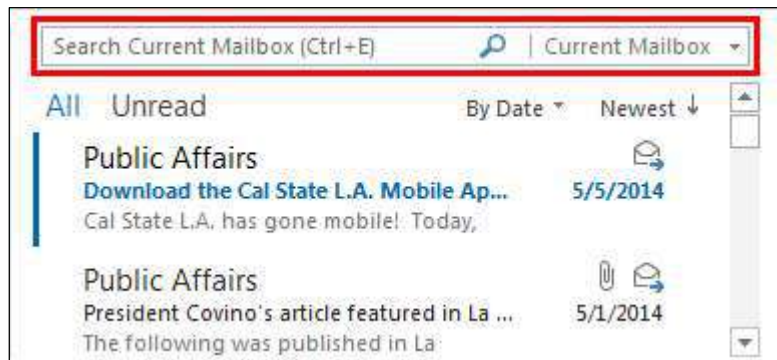


Figure 23 – Search Box in the Content Pane

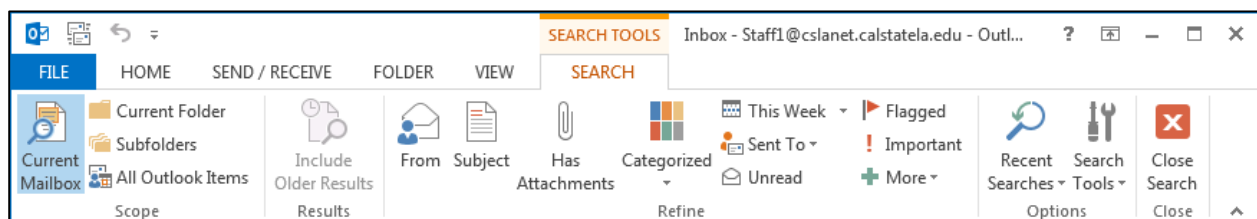


Figure 24 – Search Tools Search Tab

To search for messages:

1. In the **Mail** module, in the **Folder** pane, select the folder that you want to search.
2. Click in the **Search** box at the top of the **Content** pane and type a search term. As you type, Outlook displays the search results in the **Content** pane, with the search term highlighted (see Figure 25).

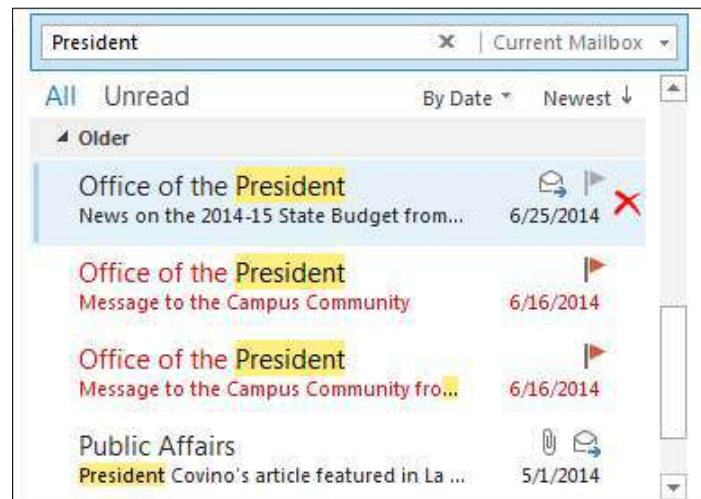


Figure 25 – Search Results in the Content Pane

3. To change the search scope, under **Search Tools**, on the **Search** tab, in the **Scope** group, do one of the following: (see Figure 26)
 - Click **Current Mailbox** to expand your search to include all mail folders.
 - Click **Current Folder** to only search within the current folder.
 - Click **Subfolders** to expand your search to include all subfolders of the current folder.
 - Click **All Outlook Items** to expand your search to include all Outlook items.

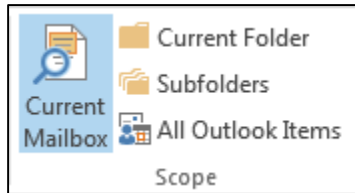


Figure 26 – Scope Group on the Search Tab

- To refine the search, under **Search Tools**, on the **Search** tab, in the **Refine** group, select the desired option (see Figure 27). For example, to find messages sent by a specific person, click the **From** button, and then type the person’s name inside the parenthesis in the **Search** box.

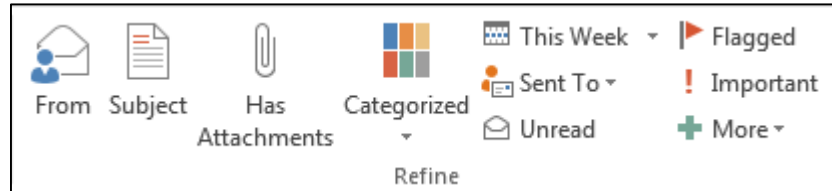


Figure 27 – Refine Group on the Search Tab

- When you are finished, click the **Close Search** button  on the **Search** tab.

Creating Rules to Process Messages

A *rule* is an action that Outlook performs automatically on incoming or outgoing messages that meet the conditions you specify in the rule. For example, you may want all messages from a specific sender or about a particular subject to automatically be moved to a specific folder. When creating a new rule, you can base it on an existing message or you can use the Rules Wizard to start from a predefined template or from scratch.

To create a rule based on a message:

- In the **Mail** module, in the **Content** pane, select the message on which you want to base the rule.
- On the **Home** tab, in the **Move** group, click the **Rules** button, and then click **Create Rule** (see Figure 28).

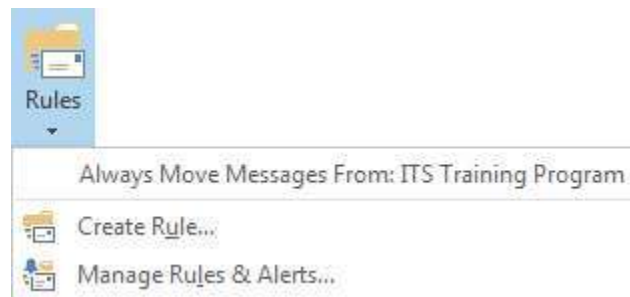


Figure 28 – Rules Menu

- In the **Create Rule** dialog box, select the desired conditions and actions for the rule, and then click the **OK** button (see Figure 29).

NOTE: If you need to add more conditions, actions, or exceptions to the rule, you can click the **Advanced Options** button to open the **Rules Wizard** dialog box.

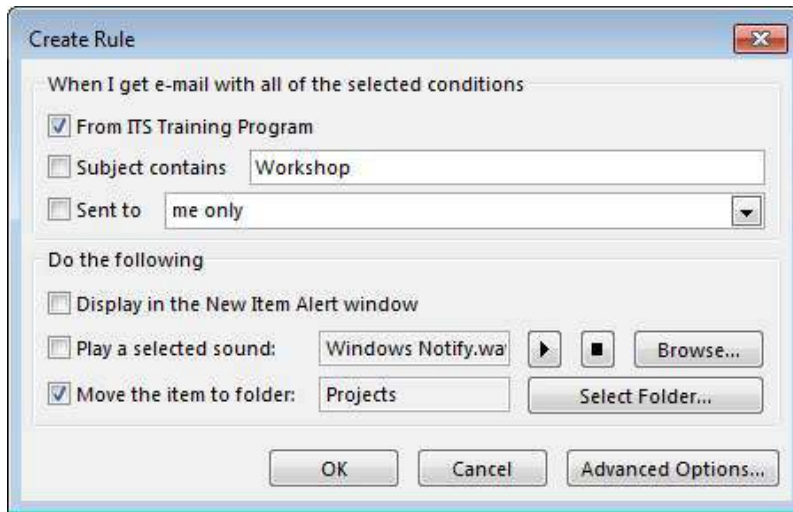


Figure 29 – Create Rule Dialog Box

4. In the **Success** dialog box, click the **OK** button (see Figure 30).

NOTE: Outlook names the rule according to the criteria you selected. If you want to run the rule on messages that are already in the current folder, select the **Run this rule now on messages already in the current folder** check box before clicking the **OK** button.

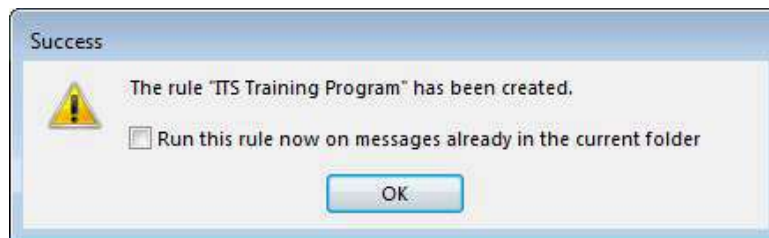


Figure 30 – Success Dialog Box

NOTE: You can use the **Rules and Alerts** dialog box to create more complex rules, or to edit or delete existing rules (see Figure 31). To open the **Rules and Alerts** dialog box, click the **Rules** button, and then click **Manage Rules & Alerts** (see Figure 28).

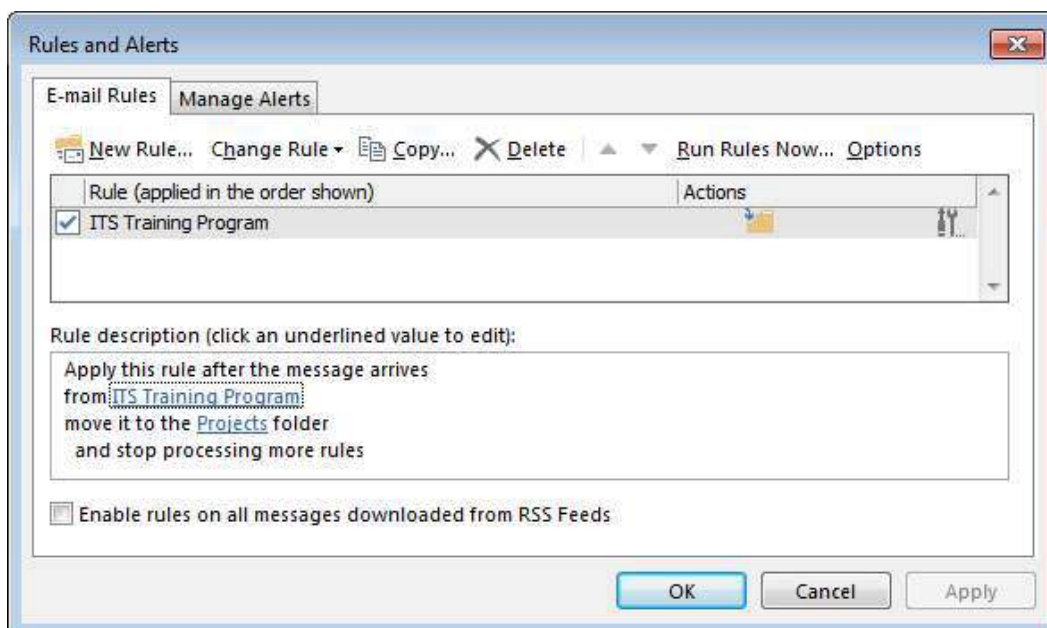


Figure 31 – Rules and Alerts Dialog Box

Blocking Junk Mail

By default, when Outlook receives a message that it deems to be junk mail (also known as spam), it delivers that message to the *Junk E-mail* folder rather than to your Inbox folder. You can also help Outlook identify junk mail by blocking senders that you do not know or trust.

To block a sender:

1. In the **Mail** module, in the **Content** pane, select a message from the sender that you want to block.
2. On the **Home** tab, in the **Delete** group, click the **Junk** button, and then click **Block Sender** (see Figure 32). Outlook moves the message to the **Junk E-mail** folder and adds the sender's email address to the **Blocked Senders** list.

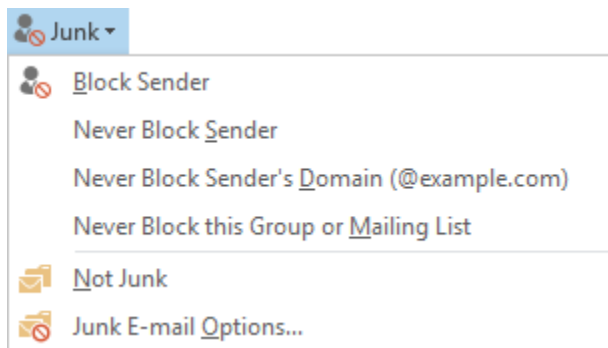


Figure 32 – Junk Menu

Checking Your Mailbox Size

Over time, your Outlook mailbox grows as you send and receive messages. You should delete unwanted messages and empty your Deleted Items folder on a regular basis so that you do not exceed your mailbox size limit. You can check the total size of your mailbox and of individual folders within it.

To check your mailbox size:

1. In the **Mail** module, in the **Folder** pane, select your account (see Figure 33).
2. On the **Folder** tab, in the **Properties** group, click the **Folder Properties** button (see Figure 34).

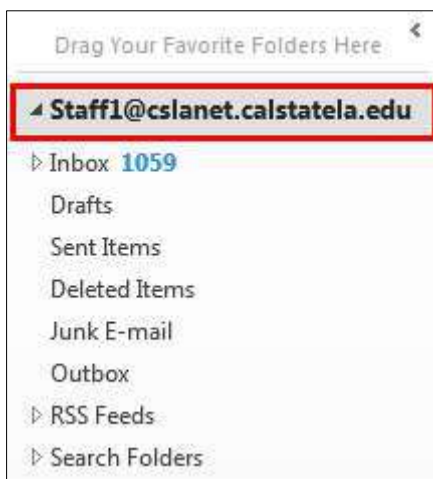


Figure 33 – Folder Pane



Figure 34 – Properties Group on the Folder Tab

3. In the **Properties** dialog box, click the **Folder Size** button (see Figure 35).

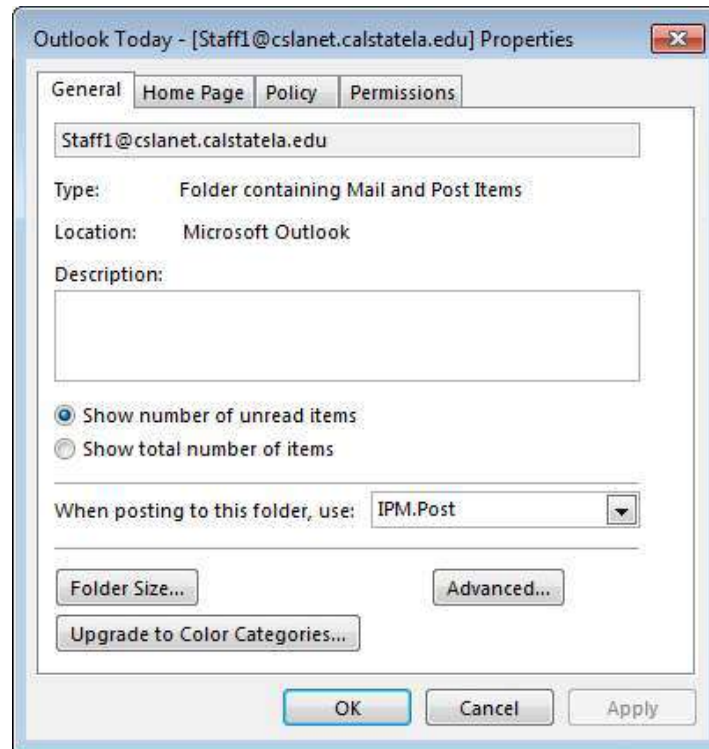


Figure 35 – Properties Dialog Box

4. In the **Folder Size** dialog box, note the number next to **Total size (including subfolders)**; that is the size of your mailbox (see Figure 36).

NOTE: The size of your mailbox and each subfolder is indicated in kilobytes (1,048,576 kilobytes = 1 gigabyte).

5. In the **Folder Size** dialog box, click the **Close** button.

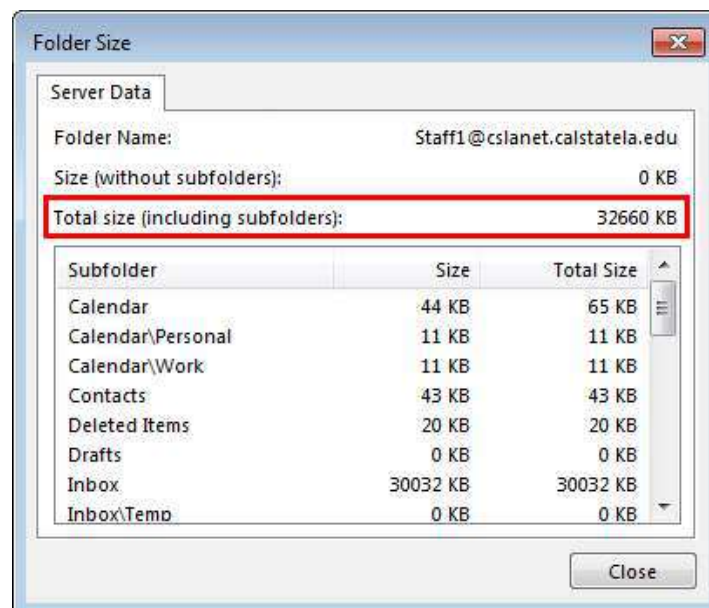


Figure 36 – Folder Size Dialog Box

6. In the **Properties** dialog box, click the **OK** button.



NOTE: You can also check the size of a folder by right-clicking the folder in the **Folder** pane, clicking **Properties** on the shortcut menu, and then clicking the **Folder Size** button in the **Properties** dialog box.

Archiving Messages

An efficient way to reduce the size of your Outlook mailbox is to regularly archive older items. You can use the *AutoArchive* feature to automatically archive items at scheduled intervals. You can also archive items manually whenever you want. That way, you can control which items to archive, where to store them, and how old an item needs to be before it can be archived. Archived items are moved to a separate Outlook Data File (.pst) and can be accessed at any time by opening the file. By default, Outlook is set up to archive messages to a file named *archive.pst*.

To manually archive messages:

1. Click the **File** tab on the **Ribbon**.
2. On the **Info** page of the **Backstage** view, click the **Cleanup Tools** button, and then click **Archive** (see Figure 37). The **Archive** dialog box opens (see Figure 38).
3. Select the **Archive this folder and all subfolders** option, and then select the folder that you want to archive. If the folder includes subfolders, those folders are archived as well.

NOTE: Clicking a white triangle  next to a folder expands the folder and shows its subfolders; clicking a black triangle  collapses the folder and hides its subfolders.

4. Click the **Archive items older than** arrow and select a cutoff date (such as items older than 3 months).
5. Select the **Include items with “Do not AutoArchive” checked** check box to include items that might be individually marked to be excluded from automatic archiving.
6. Click the **OK** button.

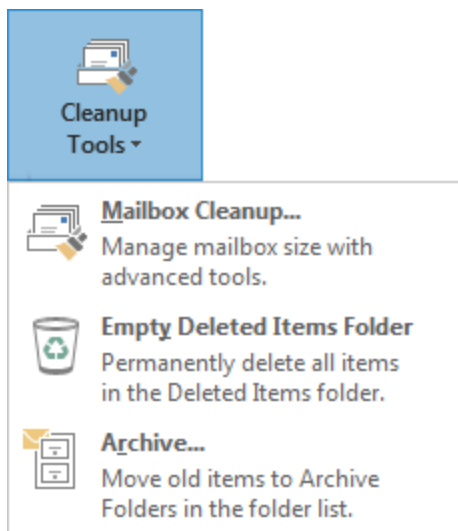


Figure 37 – Cleanup Tools Menu

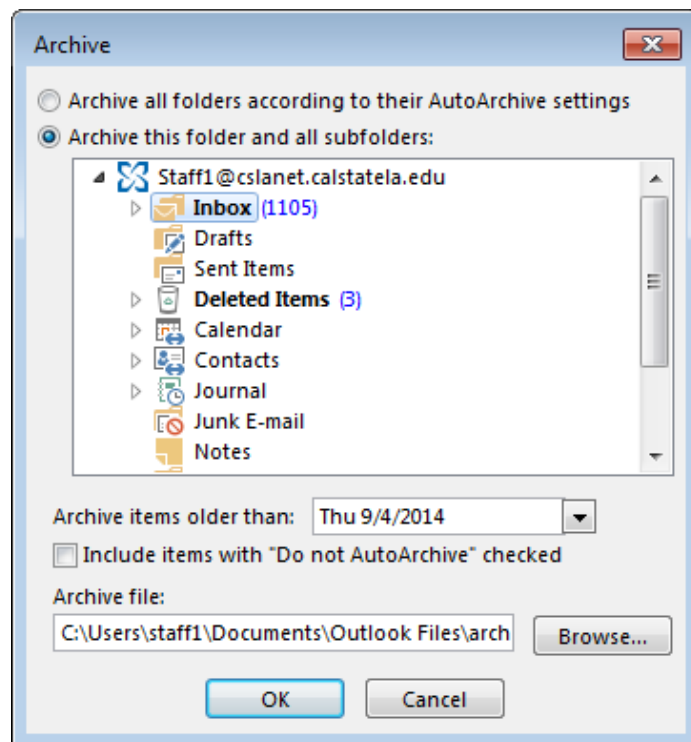



Figure 38 – Archive Dialog Box

7. Click the **Back** button  in the upper-left corner of the **Backstage** view. The archive folder (named **Archives** by default) appears in the **Folder** pane and contains all archived messages (see Figure 39).

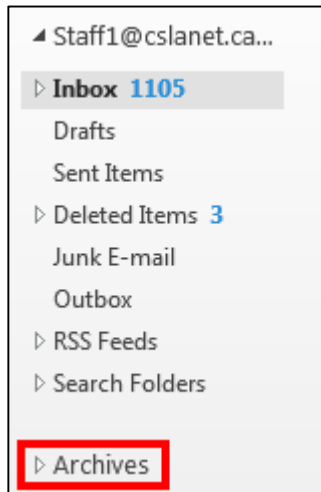


Figure 39 – Folder Pane with Archives Folder

NOTE: Your existing folder structure is maintained in the archive file. If there is a parent folder above the folder that you archived, the parent folder is created in the archive file, but the items that are in the parent folder are not archived. In this way, the same folder structure exists between the archive file and your mailbox. Folders are left in place after being archived, even if they are empty.

Delegating Access

You can give other people permission to manage your mailbox. A delegate can view your mailbox folders, send messages on your behalf, schedule meetings for you, and accept meeting requests. As the person granting permission, you determine the folders the delegate can access and the changes the delegate can make.

To delegate access:

1. Click the **File** tab on the **Ribbon**.
2. On the **Info** page of the **Backstage** view, click the **Account Settings** button, and then click **Delegate Access** (see Figure 40).

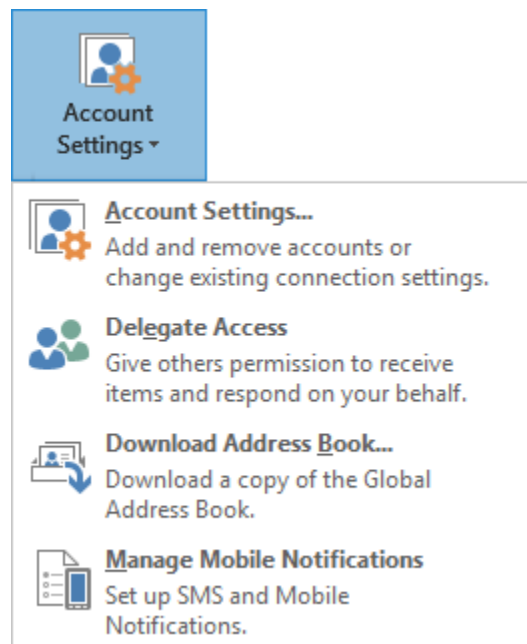


Figure 40 – Account Settings Menu

3. In the **Delegates** dialog box, click the **Add** button (see Figure 41).

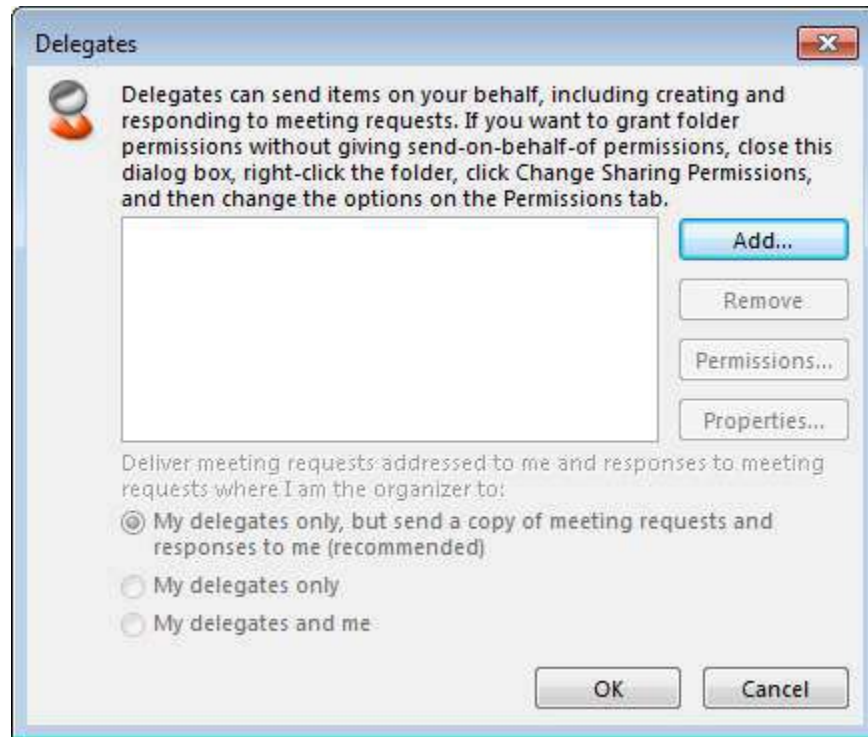


Figure 41 – Delegates Dialog Box

4. In the **Add Users** dialog box, locate and select the person that you want to designate as your delegate, click the **Add** button, and then click the **OK** button (see Figure 42).

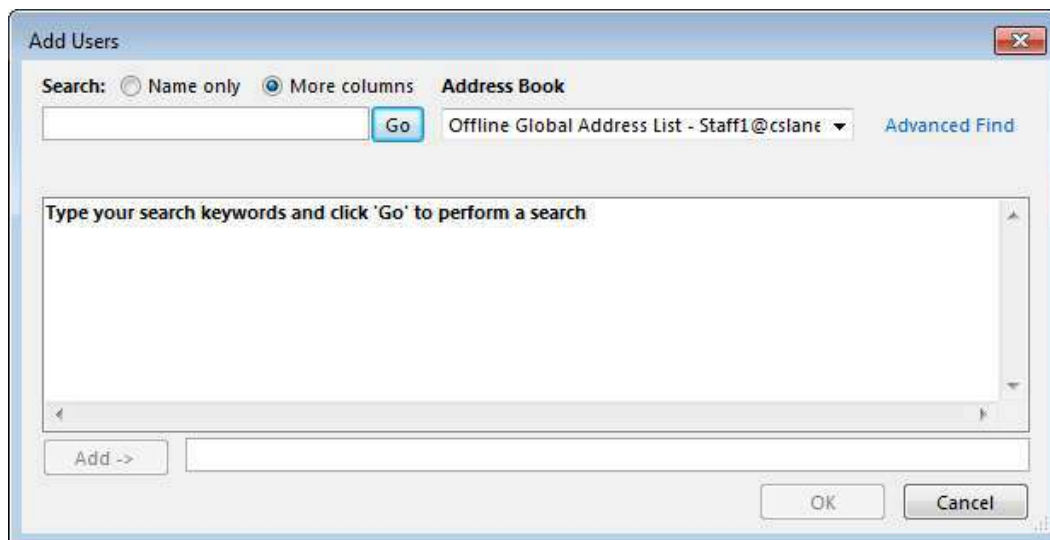


Figure 42 – Add Users Dialog Box

5. In the **Delegate Permissions** dialog box, set the permission level that you want the delegate to have for each module (see Figure 43). The options are **None**, **Reviewer (can read items)**, **Author (can read and create items)**, and **Editor (can read, create, and modify items)**.
6. Select the **Automatically send a message to delegate summarizing these permissions** check box to notify the delegate of the access permissions that you have assigned.
7. Click the **OK** button.

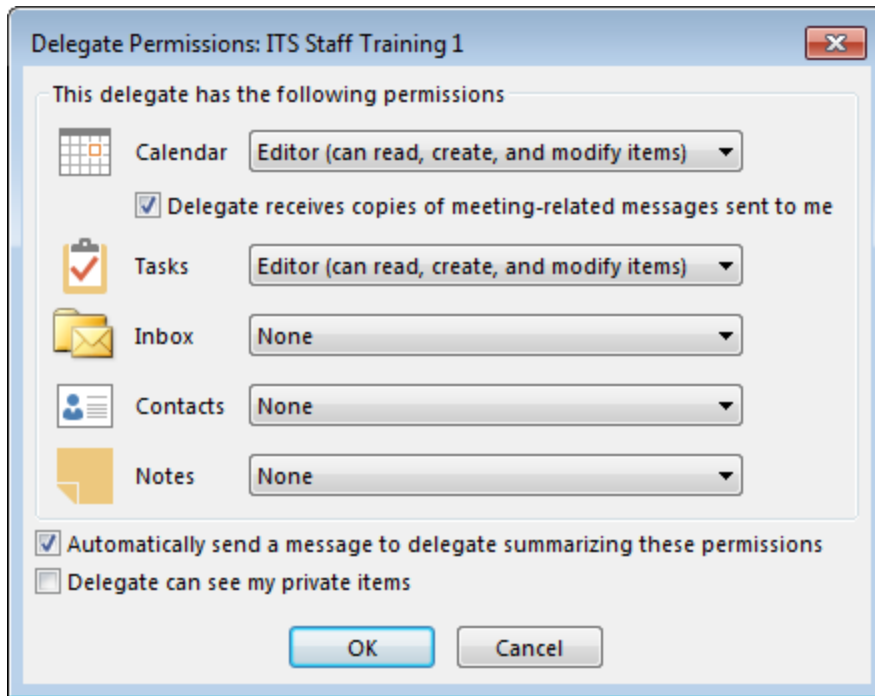


Figure 43 – Delegate Permissions Dialog Box

8. The delegate appears in the **Delegates** dialog box. Select the delivery option that you want for meeting requests and responses, and then the **OK** button.

To open a folder delegated to you:

1. Click the **File** tab on the **Ribbon**, and then click **Open & Export**.
2. On the **Open** page of the **Backstage** view, click **Other User's Folder** (see Figure 44).

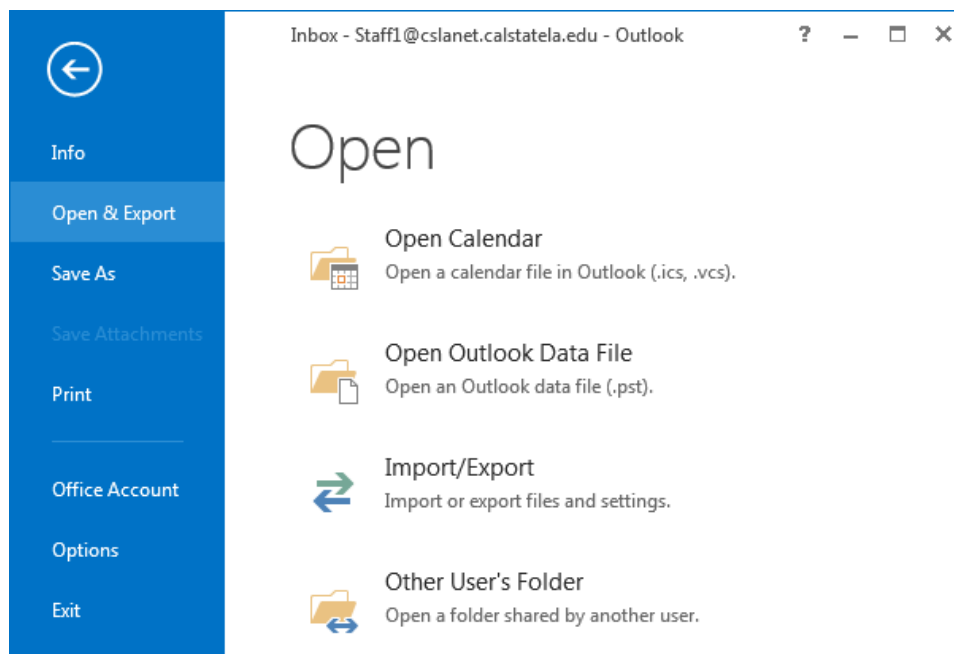


Figure 44 – Open Page of the Backstage View

3. In the **Open Other User's Folder** dialog box, type the name of the person who granted you delegate access in the **Name** box, or click the **Name** button to locate and select the person using the **Select Name** dialog box (see Figure 45).

4. Select the folder that you want to open from the **Folder type** list.
5. Click the **OK** button.

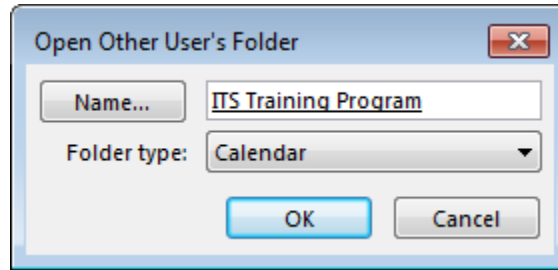


Figure 45 – Open Other User's Folder Dialog Box