



## Managing Service Accounts (For Service Account Owners on Laptop or Home PCs)

This document gives service account owners the information they need to manage service accounts in Exchange (Outlook). First, you will need to create a second profile in Outlook for your service account, and then change your Outlook setup to prompt for a username and password upon starting up. This will allow you to choose either your personal account or your service account each time you open Outlook.

### Section 1: Setting Up a Second Profile to Access Your Service Account

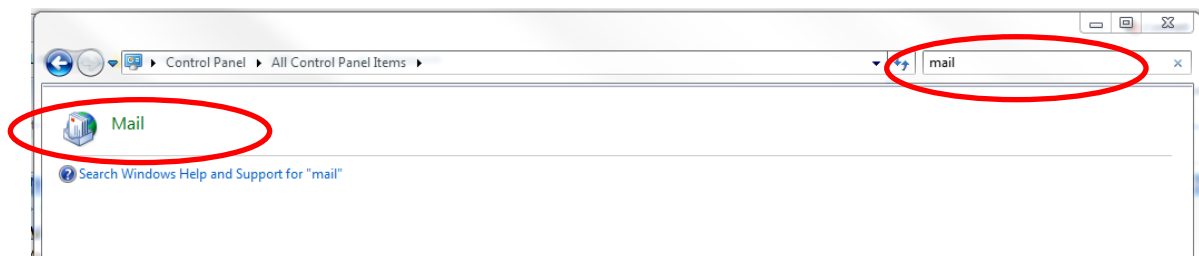
1. Click on your computer's **Start** menu (at the bottom left of your screen).

In Windows 7 or Vista, the icon looks like this: 

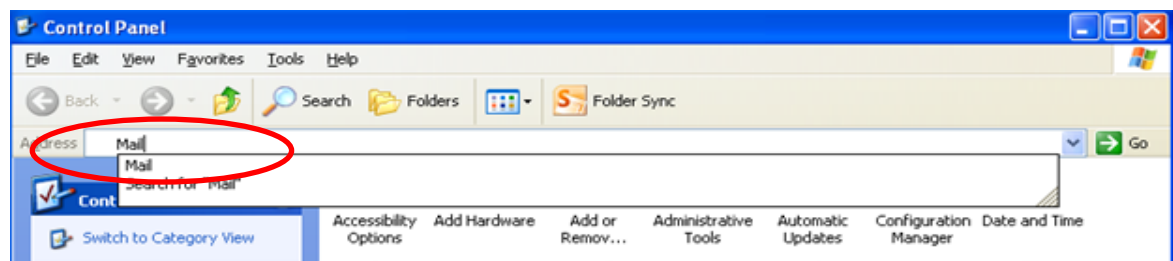
In Windows XP, the icon looks like this: 

2. Click **Control Panel**.
3. In the upper right corner of your Control Panel, click in the **Search Control Panel** window.
4. Type **mail**.
5. Double-click the Mail icon that appears at the top of the window.

In Windows 7 or Vista, the screen looks like this:

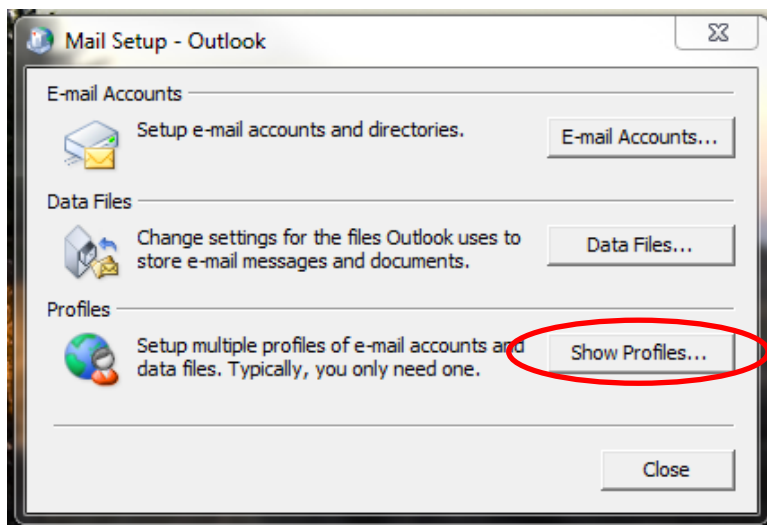


In Windows XP, the screen looks like this:

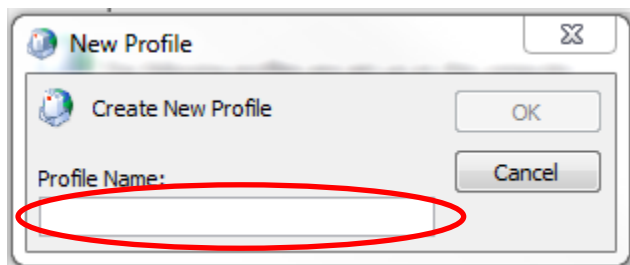


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6. Click **Show Profiles**.



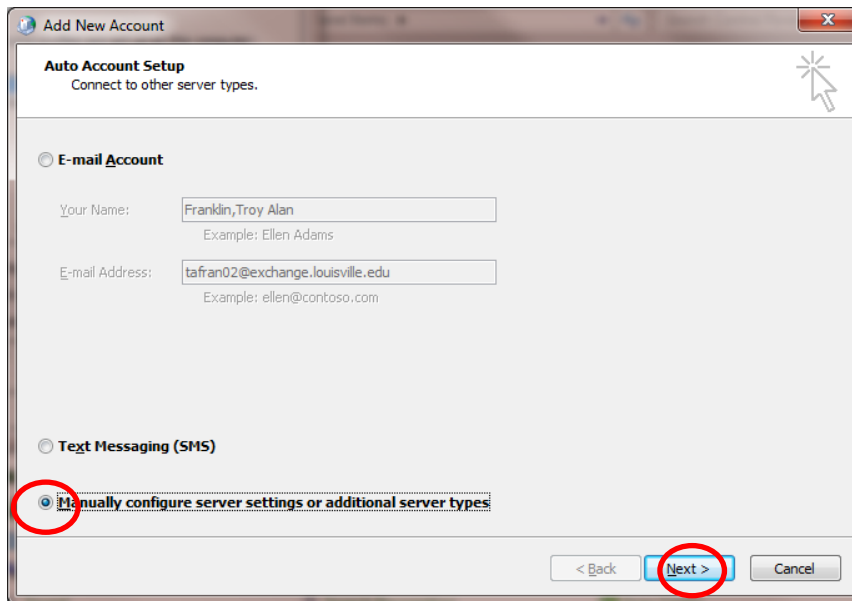
7. Click **Add**. The New Profile window will open.
8. In the Profile Name field, enter the name of the service account.



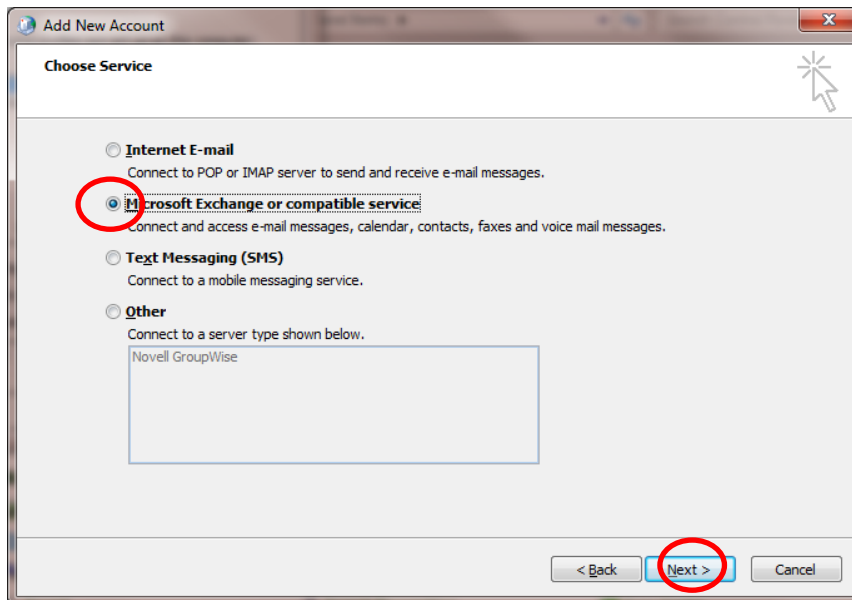
9. Click **OK**. The Auto Account Setup window will open.

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10. Since you are in Active Directory, Outlook will automatically pull in your account information.
  - a. Click Manually Configure server settings
  - b. Click Next



11. Click Microsoft Exchange or compatible service
12. Click Next



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13. In the Server: field enter **exchange.louisville.edu**

14. In the User Name <**service account userid**>@**exchange.louisville.edu**

NOTE: this is your SERVICE ACCOUNT USERID only. Not your personal userid

15. Click **Next**.

16. Click **Finish**

The screenshot shows the 'Add New Account' dialog box with the following details:

- Title: Add New Account
- Section: Server Settings
- Instruction: Enter the information required to connect to Microsoft Exchange or a compatible service.
- Text: Type the server name for your account. If you don't know the server name, ask your account provider.
- Field: Server: exchange.louisville.edu (circled in red)
- Checkbox:  Use Cached Exchange Mode
- Text: Type the user name for your account.
- Field: User Name: itcares@exchange.louisville.edu (circled in red)
- Button: Check Name
- Button: More Settings ...
- Buttons: < Back, Next > (circled in red), Cancel

17. Click **Next**.

18. Click **Finish**

19. In the Mail window, click the button beside "Prompt for a profile to be used."

The screenshot shows the 'Mail' dialog box with the following details:

- Title: Mail
- Section: General
- Text: The following profiles are set up on this computer:
- List: Novell GroupWise, Outlook, Service Account (selected)
- Buttons: Add..., Remove, Properties, Copy...
- Text: When starting Microsoft Outlook, use this profile:
- Radio Button:  Prompt for a profile to be used (circled in red)
- Radio Button:  Always use this profile
- Field: Outlook
- Buttons: OK (circled in red), Cancel, Apply

20. Select Click **OK**.

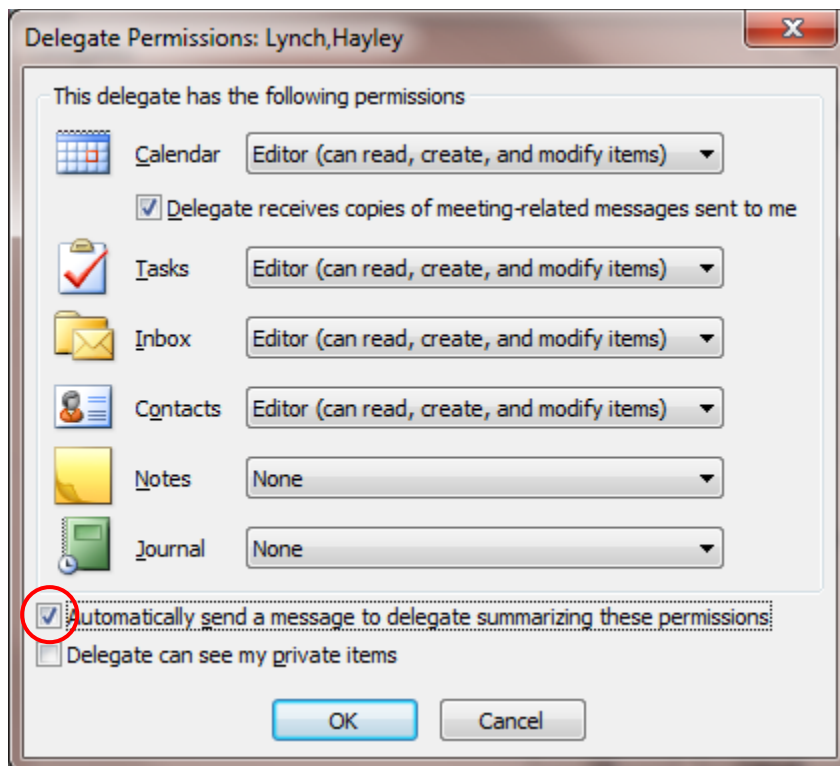
21. Restart Outlook to apply these changes.

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### Section 2: Delegating Access to Your Service Account

In GroupWise, this was called granting proxy access.

1. From your Outlook email screen, click the **File** tab at the top of the screen.
2. Click the **Account Settings** drop-down button.
3. Click **Delegate Access**. The **Delegates** window will open.
4. Click **Add**.
5. In the **Search** window, type the last name of the person to whom you are granting access to the service account.
6. Double-click the person's name from the list below the **Search** window.
7. Click **OK**.
8. Set the desired permission level you wish to grant for each of the functions listed. (From this window, you may allow access to the service account Inbox, Calendar, Tasks, Contacts, Notes and Journal.)

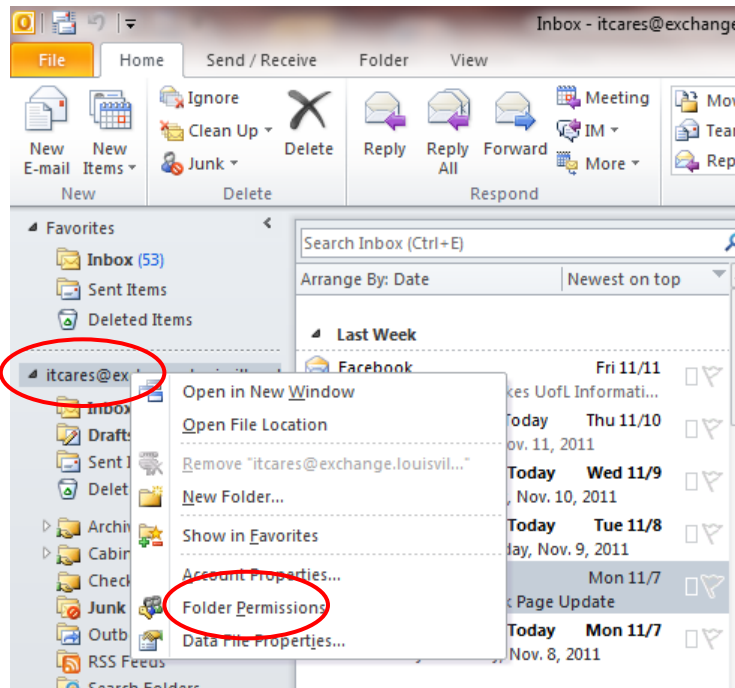


9. Check the box beside 'Automatically send a message to the delegate summarizing these permissions.'
10. Click **OK**.

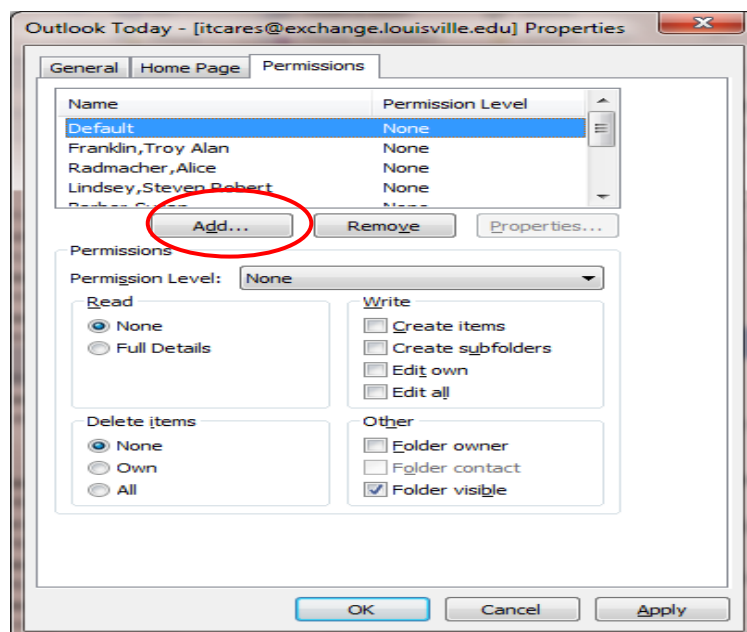
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### Section 3: Granting Visibility Access to Your Service Account Users

1. Restart Outlook and log in to your service account.
2. Right-click your account name and click **Folder Permissions**.

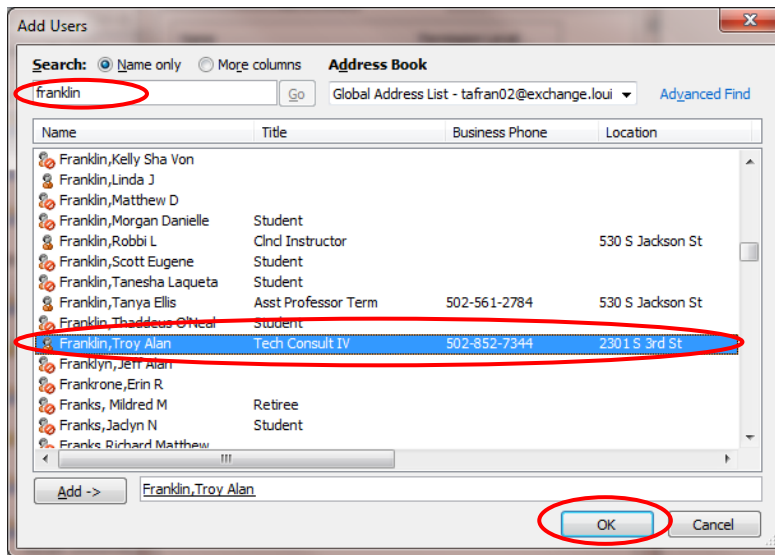


3. Click **Add**.

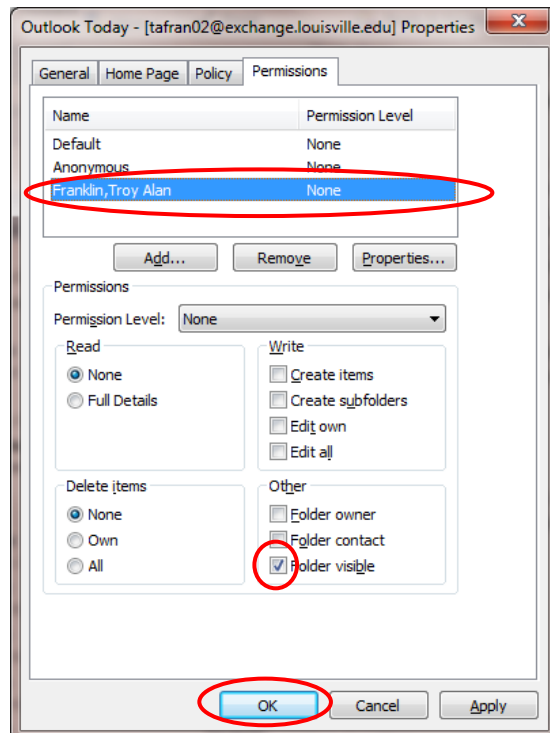


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4. In the Search window, type the last name of the user you wish to which you wish to delegate access.
5. Double-click the user's name from the list that appears below the Search field.
6. Click **OK**.



7. In the Permissions list, highlight the user that you just added.
8. Check the box next to **Folder visible**.
9. Click **OK**.



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10. Contact the user to let them know they can now follow the instructions in the document [Adding a Service Account Mailbox to Your Outlook Account](#).

### Section 4: Sharing Folders to Your Service Account Users

In GroupWise, this was called granting proxy access.

1. Right-click the **service account's email address**, listed above the **Inbox** and email folders. (Tip: Look below the **Favorites** area.)
2. Click **Folder Permissions**.
3. Click the **Permissions** tab in the window that opens.
4. Click **Add**.
5. In the **Search** field, type the last name of the person to whom you are granting access to your email folders.
6. Double-click the person's name from the list below the **Search** window.
7. Click **OK**.
8. At the top of the Permissions tab, make sure the correct user is highlighted. (This is the person to whom you are granting folder access.)
9. Click the **Permission Level** drop-down button.
10. Click **OK**. The user will now have access to your email folders.

For more detailed instructions, follow the steps in Granting Folder Access to your Service Account (Long Version) at <http://louisville.edu/email/outlook-training/Granting%20Shared%20Rights%20to%20a%20Folder.pdf>

### What are Permission Levels?

There are several different Permission Levels you can choose from when delegating calendar or folder access to another user. Descriptions of the rights granted at each of these levels are detailed below.

- **Owner**: Allows full rights to the user's calendar or folder, including assigning permissions. It is recommended not to assign this role to anyone.
- **Publishing Editor**: Create, read, edit, and delete all items; create subfolders.
- **Editor**: Create, read, edit, and delete all items.
- **Publishing Author**: Create and read items; create subfolders; edit and delete items created by the user.
- **Author**: Create and read items; edit and delete items they've created.
- **No editing Author**: Create and read items; delete items created by the user.
- **Reviewer**: Read items.
- **Contributor**: Create items.
- **Free/Busy time**: Shows only as Free or Busy on your calendar. No details are provided.

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- **None:** No permissions are set for the selected user on the specified calendar or folder.

Training videos and documents are available for these processes and many more at <http://louisville.edu/email/outlook-training>