



Microsoft

Microsoft Office Outlook[®] 2003

Reviewer's Guide

August 2003

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Introduction

Today, more people than ever are using software tools to deal with information. Microsoft has studied information workers, their work habits, and the tasks they commonly engage in to find out how people really use business productivity applications. During the design of the Microsoft® Office System, Microsoft used this information to identify and address the information fatigue, inefficient collaboration, and the lack of effective productivity tools and integration between software and devices that commonly challenge information workers in their work every day.

Microsoft Office Outlook® 2003 is the personal information management and communication client of the Microsoft Office System. This program provides information workers with the capabilities they need to work more productively as individuals and collaborate more effectively in project groups and teams. Microsoft Office Outlook 2003 is designed to promote productivity of individuals, groups, and the enterprise by making these processes more efficient:

- Searching for, accessing, and controlling access to intellectual property or sensitive information
- Creating effective teams, improving collaboration, and sharing information more quickly and effectively
- Improving individual productivity and making more effective contributions by managing, prioritizing, and acting on information more quickly and decisively

This guide is divided into four sections and an appendix.

- **“Personal Impact”** describes how individual end users can employ Microsoft Office Outlook 2003 to work more productively and contribute more effectively in an increasingly demanding business environment.
- **“Information for Everyone”** describes the Microsoft Office Outlook 2003 capabilities that provide information workers with quicker and more complete access to business information so they can gain deeper insights, make better decisions, and take more effective action.
- **“Effective Teaming”** describes how Microsoft Office Outlook 2003 communication and collaboration capabilities can help teams, organizations, partners, and customers work together with speed and agility.
- **“Microsoft Office Outlook 2003 and the Microsoft Windows Server™ Family”** describes how Microsoft Office Outlook 2003 interacts with four members of the Microsoft Windows Server™ family of products: Microsoft Windows Server 2003, Microsoft Real-Time Communications Server, and Windows SharePoint™ Portal Server. These applications enhance individual and group productivity by extending Microsoft Office Outlook 2003 capabilities that improve network security, connectivity, and performance and provide network users with more efficient data exchange and synchronization.
- **“Appendix A: Microsoft Outlook Comparison Matrix”** provides important features of the four most recent versions of Microsoft Outlook in a convenient table.

This reviewer's guide was prepared for business and technical decision-makers, who are concerned with or have responsibility for their organization's IT investments and have an interest in ensuring the productivity of their organization's workforce.

Personal Impact

Information moves at such a rapid pace that many information workers have trouble reading, tracking, and organizing the information they use every day. Microsoft Office Outlook 2003 can help users improve individual productivity and make more effective contributions by using, managing, prioritizing, and acting on information more quickly and decisively.

A Whole New Look: The Microsoft Office Outlook 2003 User Interface

Microsoft Office Outlook 2003 provides a whole new take on what an e-mail application should look like. Microsoft has responded to customer requests by learning how customers interact with their e-mail and by taking a page from the publishing community. The Microsoft Office Outlook 2003 user interface reflects the familiar, time-tested readability and layout standards used by newspapers and periodicals. As a result, the Microsoft Office Outlook 2003 user interface includes these changes, which provide a radically different user experience:

- Navigation pane
- Reading layout mode
- Reading pane
- Vertical orientation and multiple-line views

Navigation Pane

The new navigation pane in Microsoft Office Outlook 2003 gives users more relevant and context-sensitive navigation throughout the application rather than a static list of folders. The navigation pane helps users employ Microsoft Office Outlook 2003 more efficiently by combining the main navigation features and shared information into one easy-to-use pane.

In Calendar, for instance, users see the date navigator and other users' shared calendars. In Contacts, users get a list of all the local and shared folders they can open as well as different ways to view their contacts.

The Microsoft Office Outlook 2003 navigation pane provides these benefits:

- **More efficient use of screen real estate.** The best of the Outlook Bar and the Folder List are brought together into one smaller, more efficient space. All navigation tools, not just folders, are put into one place, giving users dramatically increased space to view their data. For instance, users can see up to twice as much of their calendar in Microsoft Office Outlook 2003 than in Outlook 2002.
- **Context sensitivity.** Simplified, context-sensitive navigation shows the most relevant information for each type of navigation tool. For instance, in the Mail pane, users see the list of mail folders and search folders. In Calendar, they see a date picker and a list of calendars available to them.
- **Shared data.** Sharing is simplified by presenting shared data with individual user data. For instance, users can view other calendars to which they have access, right next to their own calendar.

- **View settings.** View settings are shown in the navigation pane, making it easy to change how something is displayed.
- **Quick Launch.** Advanced users appreciate the ability to save space by shrinking the module buttons into a Quick Launch bar.
- **Go Menu.** The **Go** menu and associated keyboard shortcuts make the navigation pane more accessible.

Each of the eight navigation pane modules has a unique but consistent user interface that presents the most relevant information in an compact space. The eight navigation pane modules include:

- **Mail View.** The Mail view displays e-mail folders and Search folders and also includes a Favorite Folders section at the top of the pane for quick access. To create favorites, users simply drag an e-mail folder or Search folder to the Favorite Folders area.
- **Calendar View.** The Calendar pane shows the date navigator and a list of all calendars to which the user has access, including local calendars, Windows SharePoint Services calendars, public folder calendars, and other users' calendars, all in a simple list. Calendars can be turned on or off individually to view them side-by-side. Links to shared calendar folders enable users to open shared calendars, share their own calendar, or modify permissions.
- **Contacts View.** Like the Calendar pane, the Contacts pane provides a single place to display contacts folders that the user has access to, including local, Windows SharePoint Services, public folder, and other users' contacts. Other ways to view contacts such as **By Company** or **Address Cards** and any view that a user has created also appear in this pane. Links to shared contact folders enable users to share contact folders, view shared contacts, share their own contacts, modify permissions, and modify the set of views shown in the navigation pane.
- **Tasks View.** The Tasks pane shows a list of all tasks folders accessible to the user, including local, public folder, and other users' tasks. Views of tasks such as **Overdue Tasks** and **Next Seven Days** as well as any views a user has created are also displayed in this pane. Links to shared task folders enable users to view shared tasks, share their own tasks, modify permissions, and modify the set of views shown in the navigation pane.
- **Notes View.** The Notes pane shows a list of a user's notes individual and shared notes. Notes can be arranged into views such as **By Category** and **Last Seven Days**. Any custom views that users create will also appear in this pane. Links to shared Notes folders enable users to view shared notes, share their own notes, modify permissions, and modify the set of views shown in the navigation pane.
- **Folder List.** This module helps users manage data files in activities such as archiving and copying files between mailboxes. All local folders appear in the Folder list, just like the Folder list in previous versions of Outlook. Handy links help users to manage folder sizes and Microsoft Office Outlook 2003 data files from the Folder list pane.

- **Shortcuts.** The Shortcuts pane is a place to put shortcuts to nearly anything: Microsoft Office Outlook 2003 folders, applications, documents located on hard drives, files located on a network, shared folders, Web pages, and more. Users can create groups to organize these shortcuts and to collapse and expand the groups to use the space more efficiently. To add a shortcut, users employ the link provided or drag and drop items onto the list.
- **Journal.** The Journal pane shows a list of all public and shared Journal folders available to the user. As with the Contacts, Tasks and Notes panes, journal views are shown in this pane and can be customized. Links enable users to share or open shared Journal data folders. Although the Journal pane is deactivated by default, users can activate it by using the **Options** menu on the navigation pane or select **Journal** from the **Go** menu.
- **The Go Menu.** Users can also change their view of the navigation pane through the **Go** menu and its integrated keyboard shortcuts. The **Go** menu makes it easy to navigate Microsoft Office Outlook 2003 by using the keyboard to provide shortcuts to each of the modules of the navigation pane.

Reading Layout Mode

The new Reading Layout mode in Microsoft Office Word 2003 makes it easier to read documents on a PC screen rather than printing them out. Microsoft Office Outlook 2003 attachments and documents opened as read-only files from servers running Windows SharePoint Services will automatically open in Reading Layout mode. The advantages of this mode include:

- **Optimized experience for on-screen reading.** Documents are laid out in virtual pages that are optimized in size for the particular display being used. The text is displayed with clean margins, shorter lines, a larger font, and space permitting, two pages per screen to make on-screen documents easier to read. Text is displayed with an improved form of ClearType font technology, which provides smoother text and reduces eyestrain.
- **Useful aids to reading.** Toolbars are simplified to show only the tools useful for reading and review tasks. These tools include the new the Research task pane, where simply clicking on a word in the document will bring up definitions, translations, encyclopedia articles, and other related content from the Internet and corporate intranet; commenting tools, which provide information that reviewers type, speak or write with a Tablet PC; the Find feature; and buttons that temporarily increase and decrease font size for easier reading.
- **Easier navigation.** Rather than scrolling through pages of text, users flip pages one or two at a time to simulate the experience of reading a book, which reduces eyestrain by making it easier for a user's eyes to track the text. Users can browse a document by using the new Thumbnail view, which enables them to jump to a particular page by clicking on an image of that page; the document map, which displays the structure of the document similar to a table of contents; the mouse wheel; or any of several different keystrokes.

Reading Pane

The Reading pane helps reduce eyestrain and makes time spent reading e-mail more efficient by showing more of the message on the screen without scrolling and by reducing the need to open and manage many separate windows for different messages.

Laid out vertically, the Microsoft Office Outlook 2003 Reading pane presents messages in a manner more consistent with the way newspapers have laid out text for hundreds of years. This simple redesign of the old Outlook 2002 Preview pane and the new multi-line mail list provide nearly twice as much space for text on the same size of monitor as the horizontal Preview pane found in earlier versions of Outlook as well as a more comfortable overall reading experience.

Vertical Orientation and Multi-Line Views

In Microsoft Office Outlook 2003, mail messages are wrapped into a vertical column by allocating several lines for each message. This multi-line layout is optimized to present the most important information to the user.

In studies of how users employed previous versions of Outlook, the overwhelming results showed that users consider the sender's name or address as the most important information when they decide whether to open e-mail messages. The multi-line view puts the sender's name in dark text in the upper left corner, making it easy to scan down the list for important names. Secondary information is rendered in lighter shades of text to draw the eye towards the more important information. This view also makes messages easier to select with the pen on a Tablet PC.

Smart Dates

To use space more efficiently, Smart Dates change the date format on the fly based on how long ago the message was received. For instance, an e-mail message that was received today lists only a time, such as 3:40 P.M. Messages received in the same week list a day of the week and time such as Wed 1:24 A.M. For mail received many months ago, the exact time is less important, so Microsoft Office Outlook 2003 displays only the date, 1/12/2003, for example.

Improved E-Mail Distribution

Microsoft Office Outlook 2003 includes several customer-requested improvements to the process of addressing, composing, and sending e-mail messages. These features are designed to help all users work more productively with their e-mail. The simplified Microsoft Word e-mail editor user interface is also easier to use and requires less training.

Expanded Distribution Lists

Distribution lists can be expanded to display the names of the people on the list, making it easy to add or remove a few names before sending e-mail messages without having to modify the distribution list or start from scratch when addressing a message.

Improved AutoComplete

AutoComplete now matches on just one letter instead of three, and the AutoComplete list is sorted by most-used e-mail addresses instead of alphabetically. As a result, in many cases,

users can address an e-mail message simply by pressing the first letter in the recipient's name. With this approach, users spend less time hunting through the list because the most frequently used names are at the top. This approach can be especially beneficial to Tablet PC users by reducing the number of keystrokes or clicks needed to address e-mail messages.

Improved Address Book Interface

The Select Names dialog box in Microsoft Office Outlook 2003 has been redesigned to help users see more information on the screen at once. The dialog boxes are resizable, making it possible to take advantage of today's larger monitors, and common commands are placed more prominently in the user interface.

Alerts and Notifications

A new alert for incoming e-mail messages and the **Notification Area** icon help users keep track of their e-mail while they work with other applications.

New Mail Notification

In Microsoft Office Outlook 2003, a new desktop message replaces the New E-mail Message alert of previous versions. The New Mail desktop message fades in subtly with the name, subject, and a short text preview, so users can immediately decide whether the new message is urgent, should be marked for follow-up, or can be safely ignored without interrupting their current task. The notification message, which contains quick buttons to open, flag, or delete the e-mail message fades out if it is ignored. This feature is completely configurable by the user.

Notification Area Icon

Most information workers keep their e-mail program running all the time. The new **Notification Area** icon in Microsoft Office Outlook 2003 makes it possible for users to stay informed of their e-mail messages even if they're working in another program. **The Notification Area** icon shows the status of Microsoft Office Outlook 2003, even when the Outlook windows is hidden, minimized, or in the background. This icon displays several different types of information in new ways, which include:

- **Informational messages.** Balloons notify the user of status changes and other information without the interference of message boxes, which block the screen and require a click to dismiss. Although users can read the message if they choose, they do not have to respond to it. Users can also opt out of groups of messages that they do not want to receive in the future.

Note: Choosing not to receive messages does not affect error logs that might be created.

- **Synchronization status.** The **Notification Area** icon appears when Microsoft Office Outlook 2003 downloads and sends e-mail. This approach is useful when a user wishes to work in another program until Microsoft Office Outlook 2003 is finished sending or receiving e-mail.

- **Network problems.** If a problem with the network or mail server occurs, Microsoft Office Outlook 2003 notifies the user displaying a trouble symbol. In most configurations, data is still available in Microsoft Office Outlook 2003, but no new messages will be received until the trouble has passed. Users can cancel the network operation by clicking on the icon and choosing **Cancel Request**.
- **Hide When Minimized.** In this special mode, Microsoft Office Outlook 2003 does not appear in the taskbar when the main window has been minimized. Instead, Microsoft Office Outlook 2003 disappears into the notification area and collects messages until the user double-clicks the icon and restores the Outlook window.

Word as E-Mail Editor Simplifications

In Microsoft Office Outlook 2003, the experience of creating a new e-mail message has been vastly simplified. Commands have been consolidated into a single e-mail toolbar, which is positioned directly above the text of the message. As a result, the number of buttons on the screen has been reduced by more than half, making it easier for users to find what they're looking for and leaving more room for messages.

Searching for and Organizing E-Mail Messages

Search folders, For Follow Up folders, and the Research Library capabilities of Microsoft Office Outlook 2003 help quickly sort through e-mail messages, remember which e-mail messages require follow-up and group similar items without archiving messages manually.

Search Folders

Search folders make it easy to group relevant information without having to move or copy messages and help users to spend less time filing e-mail messages. Search folders are actually live search results that look and act like folders, but they differ from traditional e-mail folders in that e-mail is not saved in them. They are virtual folders that contain views of all e-mail items matching specific search criteria. Search folders display the results of previously defined search queries, but all e-mail items remain in their original Microsoft Office Outlook 2003 folder. With Search folders, users can easily group and browse all items relating to a subject, person, task, or other criteria without physically moving messages or folders.

Three search folders are created for users by default, so even beginners can experience the usefulness of this new tool. These folders include:

- **Unread Mail.** All unread e-mail messages, regardless of their location, are shown in the Unread Mail search folder.
- **For Follow Up.** This folder provides a virtual to-do list of all messages marked with Quick Flags.
- **Large Mail.** This folder assists with mailbox cleanup by showing the largest e-mail messages located in a mailbox.

After using Search folders, more experienced Outlook users will want to create their own. To make this task as easy as possible, Microsoft Office Outlook 2003 offers a template gallery that includes 13 ready-made templates for commonly used search

folders. These templates make it possible to create a wide range of Search folders in only three mouse clicks. Some popular search folders that can be created from templates include:

- **Important Mail.** This format provides a central location for all e-mail messages marked with High Importance flags.
- **Mail from and to a specific person.** This folder format helps users to stay informed of customer and personal relationships and can help answer questions such as, "Do I owe Janet a message?" or "Where is that e-mail conversation I had with Mark?"
- **Old Mail.** This format is helpful in locating old messages for archiving.

By clicking **Find** or **Advanced Find** on the **Tools** menu, users can save any Microsoft Office Outlook 2003 search results as a Search folder or use any of the templates provided to create a custom Search folder. In either case, users can specify the search criteria and the folders that Microsoft Office Outlook 2003 searches to create the search results. Search folders can be easily customized at any time. Users can even perform another search within the contents of a search folder to further refine their results.

For Follow Up Folder

To make finding messages even easier, For Follow Up, a special search folder, always contains an up-to-date list of all messages marked with Quick Flags, an automated, virtual to-do list for e-mail. When users take action on messages marked with Quick Flags, they can switch to the For Follow Up folder and find every message that was marked with a flag. After users finish with a message, they simply click it again to mark it as complete, and the message is stamped with the date and time it was completed. The For Follow Up folder is created by default and is located at the top of the mail folders list in the **Favorite Folders** section.

Arrange by Conversation

Arrange by Conversation helps users quickly respond to their e-mail, without embarrassing themselves by replying to items that have already been resolved.

Arrange by Conversation displays e-mail messages in a conversation-oriented or threaded view, which by default shows only e-mail that is unread or marked for follow-up, so the user doesn't need to skip over dozens of read messages to find unread ones. Similar messages are grouped together, and indented lists of messages show clearly who responded to whom throughout the conversation.

Each conversation can be expanded to show all related messages, so users can easily view the entire conversation at once instead of reading pieces here and there. Users can employ Arrange by Conversation just as easily as sorting mail by using the same interface so that the feature can be used right away by anyone familiar with previous versions of Outlook. Because multiple messages in a conversation share the same subject, the subject line appears on the screen once per conversation, which enables users to view up to twice as many messages on the screen without scrolling. As with any group in Microsoft Office Outlook 2003, the conversation can be treated as an object, so users can delete, copy, file, or forward the entire conversation at once.

Arrange By

When creating lists, users naturally group similar items. The new Microsoft Office Outlook 2003 **Arrange By** e-mail view automatically applies intelligent groupings to help users sort messages. For instance, when users arrange their mail messages by date received, Microsoft Office Outlook 2003 separates them into simple groups such as Today or Last Month. When users rearrange messages by size, Microsoft Office Outlook 2003 separates them into user-friendly groups such as Small or Very Large. These groups make it easier for users to scan through a list and find what they are looking for because the lists organize information the way that most humans work.

Advanced users can treat these groups as objects by choosing to move, delete, copy, forward, or perform other actions on all items in the group at once. For instance, e-mail messages could be grouped by date, and all messages from Last Month could be dragged to another folder and filed away with one click.

Quick Flags

Color-coded Quick Flags help users keep track of which messages require attention. In a study of users of previous versions of Outlook, Microsoft found that most people respond to nearly all e-mail messages in three ways: they responded immediately, deleted or filed the message immediately, or followed up on it later.

There are almost as many approaches to the third option as there are users. Readers can mark the message as unread, move it to a To Do folder, make a task out of it, delete it, or file all messages that don't require a response. Although each strategy may work for a particular user, each of these responses is imperfect and takes a lot of extra time.

Quick Flags are designed to solve this problem. Activated by a single click, Quick Flags are very simple to use. Users click the **Quick Flag** icon next to any e-mail message in any Microsoft Office Outlook 2003 folder, mark it, and move on with what they were doing, minimizing the disruption of managing e-mail. Each marked message displays a brightly colored flag that makes the message easy to find again.

Rules and Alerts

The enhanced Rules and Alerts feature notifies users about updated Windows SharePoint Services site information, live search results, and more. Rules and Alerts helps information workers remain informed of workflow events as they happen.

The process of creating new rules has been streamlined. Creating and changing commonly used rules also make it easier for information workers to stay organized. Users employ a simple process to view and change rules after they're created. Common rule actions can be viewed graphically and modified quickly. In addition, users can associate alert messages with their rules to stay informed of current information.

Information for Everyone

When information workers cannot get access to information they need to make timely, effective decisions or if they make decisions based on outdated information, their work within an organization becomes less effective. Microsoft Office Outlook 2003 provides more people in an organization with quicker access to and a better understanding of business information so they can gain deeper insights, make better decisions, and take more effective action.

This section describes how Microsoft Office Outlook 2003 can help information workers access and use information more effectively and help IT professionals improve the performance of their infrastructure.

Rapid, Easy Access to Information from Any Location

Information workers can now use the Microsoft Office Outlook 2003 Outlook Web Access, Outlook Mobile Access, and the new Research task pane to search for information on the Internet or a corporate data source from directly within an Office 2003 application.

Outlook Web Access

Information workers rely on Outlook Web Access to reach their exchange Server-based personal business information from any computer connected to the Internet. Outlook Web Access features a similar interface as Microsoft Office Outlook 2003 and provides users with a consistent experience, whether they connect to the Internet from their desktop computers or a kiosk at an airport. In addition to security and performance improvements, Outlook Web Access supports more Microsoft Office Outlook 2003 functionality, including spell checking, task management, and protection against junk e-mail messages.

Outlook Web Access now supports the S/MIME security standard. Support for S/MIME requires Internet Explorer 6.0, Microsoft Windows 2000 or higher, and the Outlook Web Access S/MIME control, which can be downloaded by entering the Outlook Web Access options page. To access the options page, click the **Options** button at the bottom of the Outlook Web Access navigation pane.

Another security feature, automatic connection time-out after an idle period, reduces the likelihood of security breaches at unattended browsers.

Research Library Task Pane

When a Microsoft Office System add-on is used with Microsoft Internet Explorer, Microsoft Office Outlook 2003 includes a Research task pane that enables users to search for information on the Internet or a corporate intranet from within any Office 2003 application. With the library task pane, users can access corporate data and work with their research information as they create reports, charts, and other Microsoft Office 2003 documents.

In Microsoft Office Outlook 2003, the Research task pane enables easier reading of foreign language e-mail messages because a single click can provide a translation of a word or the entire e-mail message to the user's native language. This approach is especially useful in organizations in which many users are not native speakers of a predominant language.

Protecting Digital Intellectual Property

Programs of the Microsoft Office System enable in-document editing rights and content protection that helps project owners to specify who is allowed to make changes to program content. Information rights management functionality allows Cut, Copy, Paste, Print and e-mail forwarding functions to be restricted for specific documents, giving users and organizations more control over their valuable information assets.

Information rights management capabilities are enabled by Microsoft Windows Rights Management Services (RMS) for Windows Server 2003. RMS is designed to help enterprise customers control and protect critical digital information by offering easy-to-use, flexible, and persistent policy expression and enforcement. Because Rights Management policy expressions can remain within files during and after transit, rather than residing on a corporate network, usage policies can be enforced even when rights-managed information leaves the network.

Rights Management in Microsoft Office Outlook 2003

Rights management technology in Microsoft Office Outlook 2003 provides organizations and information workers with greater control over their own data. Rights management is a persistent, file-level Microsoft security technology that enables users to specify who can access and use documents or e-mail messages and to protect that digital intellectual property from unauthorized printing, forwarding, or copying.

Rights Management support in Office 2003 helps corporations and knowledge workers address two fundamental requirements:

- **Digital intellectual property protection.** Most corporations rely on firewalls, log-on security, and other network technologies to protect their digital intellectual property. The fundamental limitation of these technologies is that, when authorized users have access to the information, they can share it with unauthorized people, potentially breaching security policies. Rights management protects the information itself from unauthorized access and reuse.
- **Information privacy, control, and integrity.** Information workers often deal with confidential or sensitive information, relying on the discretion of others to keep sensitive materials private. Rights management eliminates any temptation to forward, paste, or print confidential information by disabling unauthorized functions in IRM-protected documents and e-mails.

With Rights Management Services, protected messages are automatically encrypted during transit, and when restrictions are applied by the sender, Microsoft Office Outlook 2003 disables the restricted commands. Office 2003 documents attached to protected e-mail messages are automatically protected as well.

Rights Management Services extends a key Microsoft Windows platform technology called Windows Rights Management. This information protection feature works with applications to help safeguard confidential and sensitive enterprise information—no matter where it goes. Responding to customer demand for improved content protection, Microsoft designed rights management as an extensible platform, which is capable of integrating with third-party applications as well as with components of the Microsoft Office System.

RMS is information security technology, not network security technology. It enables documents to be shared and sent in e-mail messages while maintaining control over who can use it and what they use it for. Whenever a document or e-mail message is protected with this technology, access and use restrictions are enforced, no matter where the information is located.

RMS enables IT managers to enforce existing enterprise policies regarding document confidentiality, workflow, and e-mail retention. For CEOs and security officers, RMS significantly reduces the risk of having key company information in the hands of the wrong people, whether by accident, thoughtlessness, or through malicious intent.

When RMS is enabled by the organization, users of Microsoft Office Outlook 2003 will be able to easily take advantage of this technology. A simple user interface based on customizable rights templates is available in the standard toolbar. The templates make RMS convenient and approachable. Integration with the Windows Active Directory® directory service provides convenience not provided by current, document-specific passwords. Finally, a free RMS viewer guarantees that any user of Windows-based software can read RMS-protected documents whether or not they use the Microsoft Office System, so that organizations can enforce security policies and share intellectual property outside the company.

Rights Management in Outlook E-mail Messages

Rights management can be used in Microsoft Office Outlook 2003 to prevent e-mail forwarding, copying, or printing of protected messages, which are automatically encrypted during transit. When restrictions are applied by the sender, Microsoft Office Outlook 2003 disables the necessary commands. Office 2003 documents attached to protected messages are automatically protected as well.

Junk E-mail Filtering

Microsoft Office Outlook 2003 includes functionality designed to help block much of the unwanted e-mail that users get every day. These features give users control over the kinds of messages they receive and whom they want to receive mail from. Microsoft Office Outlook 2003 provides a set of features designed to work together to help protect users from unsolicited e-mail messages.

Junk E-Mail Filter

Microsoft Office Outlook 2003 uses state-of-the-art technology developed by Microsoft Research. This feature uses several factors, such as the time it was sent and the content of the message to evaluate whether a message should be treated as junk e-mail. The filter does not single out any particular sender or type of e-mail. Message handling is based on the content of the message and uses advanced analysis of the structure of the message to determine how likely the user will consider the message as junk e-mail.

By default, this filter is set at **Low** to catch the most obvious junk e-mail. Any message that is caught by the filter is moved to the Junk E-mail folder, where it can be retrieved by a user at a later time. If users wish, they can set the filter at higher levels (and perhaps mistakenly catch some legitimate messages) or set Microsoft Office Outlook 2003 to permanently delete junk e-mail messages as they come in.

The Junk E-mail filter is turned on by default. The first time Microsoft Office Outlook 2003 moves a message to the Junk E-Mail folder, the user is notified with an alert message. In versions of Microsoft Exchange Server that lack cached exchange mode, junk e-mail filtering must be installed and configured on the computer running Exchange Server 2003.

Advanced Junk E-Mail Message Filter

Exchange Server-enabled anti-spam filters use keywords and patterns (for example, mail sent at an unusual time of day) that are automatically derived from examples of spam and normal mail to calculate a score for each incoming message. Messages with scores within a specific range are handled as suspected spam, which can be moved to a special e-mail folder. Both positive and negative scores are used during this anti-spam evaluation process. Users can customize how Microsoft Office Outlook 2003 handles this e-mail by setting filters to Low, High, or Exclusive or by turning off the anti-spam filter.

Block External Content

HTML-formatted messages often contain pictures. Often, these pictures are not included in the message itself but are downloaded from a Web server when the e-mail message is opened. Junk e-mail senders have used this capability to their advantage by including something called a Web beacon in their junk e-mail messages. A web beacon notifies the Web server when a user reads the junk message, which validates the recipient's e-mail address. This strategy often results in the user becoming a target for more junk e-mail.

By default, Microsoft Office Outlook 2003 helps protect user privacy and provides users with more control over the information in their inbox through a feature called Block External Content. If an e-mail message tries to connect unannounced to a Web server on the Internet, Microsoft Office Outlook 2003 blocks the connection until users decide to view the content. If users prefer, this feature can be turned off. Giving users control over external content has several advantages:

- Unannounced connections to arbitrary Web servers on the Internet are no longer allowed, which stops the flow of user information to e-mail solicitors.
- Because pictures are not shown unless the user requests them, many offensive messages can be deleted without the user being subjected to its images.
- Users on a low-bandwidth connection can choose whether an image is valuable enough to warrant the time and bandwidth to download it.

It's important to note that Microsoft Office Outlook 2003 retains all of its rich functionality for viewing and sharing pictures. Using Block External Content does not block pictures—unannounced connections to the Internet are. Whenever pictures are sent with the message and are not on a Web server, they will be displayed by default. Content creators who wish to send richly formatted HTML mail to their customers can still do so by including the pictures in the body of the e-mail message.

Pictures added to mail sent by Microsoft Office Outlook 2003 or Microsoft Outlook Express already use the MHTML standard by default and include the pictures in the message itself, so they are not affected. E-mail messages that contain references to images or content on the Intranet or on trusted sites, which are defined by Internet Explorer's Intranet and

Trusted zones, will not be affected. E-mail messages sent from someone on a defined list of trusted senders will not be affected. Users can easily add e-mail addresses to this list.

Trusted Senders and Recipients Lists

A mailing list can also be added to the user's Trusted Recipients list. Messages sent to e-mail addresses or domain names on this list will not be treated as junk, regardless of the content of the message.

If an e-mail message is mistakenly marked as junk by the filter, users can add the sender of that message to the Trusted Senders list. E-mail addresses and domain names on the Trusted Senders list are never treated as junk e-mail, regardless of the content of the message. Contacts are automatically trusted by default, and mail from them will never be treated as junk. With Microsoft Exchange Server, mail from within the user's organization will never be treated as junk, regardless of the content of the message. Users can configure Microsoft Office Outlook 2003 to accept only mail from the Trusted Senders list, which gives users total control over which messages reach their inbox.

Junk Senders List

E-mail from specific e-mail addresses or domain names can easily be blocked by simply adding the sender to the Junk Senders list. Mail from people or domain names on this list are always treated as junk, regardless of the content of the message.

AutoUpdate

Microsoft is committed to providing periodic updates of the Junk E-mail Filter so that it continues to be effective. However, the AutoUpdate feature is not included in the Microsoft Office System Beta 2 release.

Information Services for Small Businesses

Although many of the Microsoft Office System features and functions are designed to enable collaboration and information management on an enterprise level, Microsoft Office Small Business Edition 2003 contains many features specifically designed to help small businesses achieve new levels of collaboration and efficiency.

The Business Contact Manager component of Microsoft Office Outlook 2003 is a new, optional, add-on feature that helps small business owners and sales personnel stay informed of the details that contribute to their business success. Microsoft Office Outlook 2003 with Business Contact Manager is available in Microsoft Office Small Business Edition 2003. This program can help sales professionals and small business owners to build profitable business relationships and to track and manage business contacts, accounts, and sales opportunities.

Microsoft Office Outlook 2003 with Business Contact Manager helps small business owners and salespeople work more productively by enabling them to track their business relationships and sales opportunities in one place. Microsoft Office Outlook 2003 with Business Contact Manager also seamlessly connects small businesses to their customers through integration with List Builder, an e-mail marketing service from Microsoft bCentral, and to their business data through integration with other Microsoft Office System applications. Finally, Microsoft Office Outlook 2003 with Business Contact Manager is easy to

use, because it uses the familiar Outlook interface, which small business users already know.

Microsoft Office Outlook 2003 with Business Contact Manager includes the following features:

- **Accounts and Business Contacts.** Users can track companies they do business with as well as their interactions with individual contacts who work there. This hierarchy helps users get a more comprehensive picture of their overall relationship with an account.
- **Business Opportunities.** Users can employ the new Business Opportunity feature to track sales opportunities through the sales cycle and convert prospects to customers. Business Opportunities contains important information such as sales cycle stage, revenue potential, and the probability of converting the opportunity to a sale, which users can employ to forecast their sales pipeline more accurately.
- **Activity History.** Users can view all activity related to an account, business contact, or business opportunity consolidated in one place. E-mail messages, tasks, notes, and calendar items are now automatically associated with the appropriate account, business contact, or business opportunity. Users can review these items as well as associated documents in the Activity History area to familiarize themselves quickly with important relationships.
- **Reporting.** Users can quickly filter and summarize information about their accounts, business contacts, and business opportunities by running one of 20 customizable reports. For example, users can run reports to show only neglected contacts that have not had any recent activity or to view a sales pipeline for the next quarter. Reports are customizable and can be exported to Microsoft Word or Microsoft Excel for further formatting and analysis.
- **Contacts and Opportunities.** The Contacts and Opportunities feature integrates with the Microsoft Office Outlook 2003 calendar to provide time-sensitive alerts and keep business opportunities on track. Users can easily organize sales contact and opportunities and all related e-mail messages, documents, telephone numbers, addresses, and other pertinent information.

Internet Faxing

Fax modem traffic can use the telephone line for long periods of time, incur long distance charges, or require redialing or manually confirming that faxes were sent correctly. With an Internet fax service, sending faxes is much easier, and fax messages can be sent to the recipient's Outlook inbox. Microsoft Office 2003 applications including Microsoft Office Outlook 2003 integrate directly with Internet fax services. Users can send faxes to individuals, multiple recipients, or international destinations as easily as sending e-mail.

Unicode Support

Microsoft Office Outlook 2003 supports Unicode for Contacts, Mail, Calendar, Tasks and Notes information. This approach extends e-mail capabilities to a wider range of users by enabling them to view and edit text within Microsoft Office Outlook 2003 files in any language and any

script installed and supported by the operating system. Unlimited Multilingual User Interface support enables IT administrators to switch character sets.

Effective Teaming

Enabling close collaboration among information workers is a major focus of the new Microsoft Office System. The combined capabilities of Office 2003 and Windows SharePoint Services provide new ways to connect individuals, teams, and organizations; enable workers to collaborate together from anywhere; speed approval and review processes; and provide additional agility for organizations responding to business opportunities.

Integrated Messaging and Scheduling Services

Because scheduling and communication typically require a great deal of back-and-forth interaction, it is often difficult for employees in different locations to contact one another. Until now, collaboration technology has been difficult to use without a lot of infrastructure. Microsoft Office Outlook 2003 and Windows SharePoint Services bring powerful collaboration tools directly to the user in an easy-to-use interface, and integrated instant messaging presence information enables users to communicate seamlessly.

Instant Messaging and Alerts

Instant messaging and alert capabilities are provided by Microsoft Live Communications Server technology, which is integrated throughout Microsoft Office System collaboration tools. This integration enables instantaneous presence information and the ability to initiate instant messaging conversations quickly from within documents, shared workspaces, or Microsoft Office Outlook 2003.

Alerts notify users of changes to documents, document libraries, lists, surveys, or even search results by sending e-mail notifications. Users can easily set up rules to move alert messages to folders and view all active alerts in Microsoft Office Outlook 2003 by using the Rules and Alerts dialog box.

Shared Contacts and Shared Calendars

Contacts and calendars are lists commonly used to store both personal and group information. Team members can easily share and get access to calendars to facilitate meeting planning and scheduling.

Side-by-Side Calendars

Microsoft Office Outlook 2003 makes it possible to view local, public folder, and other user calendars and calendar views side by side in the main Outlook window. Users can also view the individual calendars of people on their team. The calendars scroll together and are color-coded, making them useful for comparing schedules or finding a teammate. Users can drag appointments between calendars or onto their own calendar or use the New Meeting With feature to quickly set up a meeting with the owners of some or all of the open calendars.

After users open a calendar, it appears in the Calendar module of the Outlook navigation pane. To turn these calendars on side by side, users simply check the box next to the relevant calendars; to turn a calendar off, users clear the check box.

Creating Document Workspaces with Windows SharePoint Services

When Microsoft Office Outlook 2003 users attach an Office 2003 document to an e-mail message, the Attachment Options task pane becomes visible. By default, the attachment will be sent in the same way as in the previous versions of Outlook. However, if users select **Shared Attachment** and send the message, the document will be stored on a document workspace site that is created automatically on an available server running Windows SharePoint Services. If users wish, they can specify the SharePoint site on which to create the document workspace or use the default setting.

Creating a Document Workspace for a Document in a SharePoint Site

When SharePoint sites grow quite large with many members, some users may want to move a document to a semi-private space to work on it further, without disrupting the current public version while editing is in progress. Users can create a workspace site for the document, work on it alone or with a few others until it is finished, and then publish it to the main SharePoint Services site.

Whether initiated with e-mail messages or Office 2003 applications, sharing attachments automatically provides all of the collaborative workflow and information functionality found in a document workspace. This information also appears in context, directly in the Shared Workspace task pane beside the document whenever it is opened on a team member's PC. Recipients of the e-mail message are automatically added to the workspace. By sending a simple e-mail and attachment, users enable a powerful collaboration tool for team members, wherever they might work.

Windows SharePoint Services and Microsoft Office Outlook 2003

With Office 2003, data from Windows SharePoint Services can be used directly within Microsoft Office Outlook 2003, helping information workers to make better use of team information by integrating it with their own. For instance, a team might post a schedule of product reviews on a SharePoint Services site for the whole team to use. Team members can check that schedule against their own by opening up the Live Calendar view of a SharePoint Services list displayed side by side with their calendars in Microsoft Office Outlook 2003. Events from a SharePoint Services list, which look and behave just like Outlook appointments, can be dragged and dropped from the SharePoint Services calendar into each user's Microsoft Office Outlook 2003 calendar.

Other benefits of tight integration between Windows SharePoint Services and Outlook in Office 2003 include:

- **Integrated contacts and calendar information.** Microsoft Office Outlook 2003 and Windows SharePoint Services now enable users to view team and personal calendars side by side. Users can select to view the team calendar and team contacts directly in Microsoft Office Outlook 2003, making the information always available.
- **SharePoint alert messages.** Specialized alerts can help workers to be more effective by easily staying up-to-date with relevant information. Users can access alerts by clicking on **Alert Me** links in any SharePoint Web site.

- **Offline availability.** Data from Windows SharePoint Services is cached on the local computer, so it can be taken offline. This approach provides calendar and contact lists that can be viewed when the SharePoint Services site is unavailable, such as when users travel on an airplane.

Live Attachments

Creating an attachment in Microsoft Office Outlook 2003 offers an option to create a live attachment. Creating a live attachment opens a Windows SharePoint Services site to hold the document and inserts a link to the site in the e-mail message. Recipients are sent to the Web site to get the live copy instead of getting individual copies in the e-mail message.

Users can distribute Live Attachments for peer review. The actual document remains on the computer running Windows SharePoint Server, but multiple users can make changes at the same time as if they each had their own copy.

Meetings Workspaces

Meetings workspaces are designed for anyone who invests time in preparing for, conducting, and following up on meetings. The workspace provides a secure, online site that centralizes all meeting-related communication, documents, and logistics. This approach makes meeting workspaces the perfect location for everything meeting-related to be organized, shared, and archived. The meetings workspace is designed to make the meeting process more intuitive, streamlined, and effective; save customer time; and improve attendee productivity.

Built with Windows SharePoint Services and Web Parts, the meetings workspace is essentially a customized site that provides quick access to simple, easy-to-use tools that help bring employees together for one-time, recurring, or related meetings. Users can easily set up a meeting workspace site by creating a new meeting request within Microsoft Office Outlook 2003.

By using meetings workspaces, administrators can easily plan the meeting, coordinate attendees, provision the meeting area with any necessary documents or collateral materials, and include remote employees in the conversation. Functions supported by the meetings workspace include the following:

- Disseminating pre-planned agenda items and materials
- Sharing visual materials, content, meeting minutes, and action items
- Facilitating recurring meetings or reporting problems with a current meeting
- Updating collateral without having to resend the meeting request
- Taking simple notes during the meeting or capturing more complex notes from Microsoft OneNote™, for example
- Integrating meetings calendar views of a Windows SharePoint Services list and integrating workspaces within any SharePoint Services site.
- Relating workspace information by using application task panes
- Editing workspace data with Excel, Microsoft PowerPoint®, or Microsoft Word

In this way, meeting workspaces can help meeting organizers and participants capture important information, tasks, and follow-up items generated during the meeting and disseminate meeting notes and action items afterward.

Microsoft Office Outlook 2003 and Windows Server Family Servers

Organizations can extend the communication, collaboration, and information management capabilities of Microsoft Office Outlook 2003 by running it in computing environments that include members of the Microsoft Windows Server family.

Microsoft Exchange Server 2003

Using Microsoft Office Outlook 2003 in an environment that includes Microsoft Exchange Server can improve network performance in scenarios that require mobile user access to corporate data, high levels of network awareness and intelligent connectivity, and data synchronization.

Cached Exchange Mode

Several earlier releases of Outlook included the ability to synchronize data between a computer running Exchange Server and its local data store. From applications in Office 2003, users can use Send or Receive groups to synchronize their data and use the new cached exchange mode in Microsoft Office Outlook 2003 to synchronize their data continuously.

The new cached exchange mode in Microsoft Office Outlook 2003 helps insulate workers from network performance issues and helps IT administrators control the volume of network traffic.

Microsoft Office Outlook 2003 clients using cached exchange mode perform most e-mail-related tasks from the local client, which reduces the number of data requests to the server and improves performance of items stored in the local copy of the mailbox or .ost file. This approach greatly improves the experience of remote or branch office Microsoft Office Outlook 2003 users as well as removes the need to restart Outlook 2003 to an offline profile when network interruptions occur.

When working against Exchange Server 2003, synchronization is more efficient and robust because the server and client communicate in a new way that's designed to significantly reduce the amount of data that's transferred during synchronization. These improvements are especially important in mobility scenarios, in which connection between Microsoft Office Outlook 2003 and the computer running Exchange Server 2003 is over a network that has limited bandwidth and variable latency.

This improved efficiency results in cost savings on pay-by-the-byte networks and generally reduces the amount of time required to complete any synchronization. Users who synchronize data between Microsoft Office Outlook 2003 and a server running Exchange Server 2003 will automatically benefit from these improvements. The improved synchronization makes it possible for Microsoft Office Outlook 2003 to support a new set of mobile scenarios and other situations, in which networks have limited bandwidth and variable latency.

Intelligent Connectivity

The Intelligent Connectivity feature introduces network awareness to Microsoft Office Outlook 2003 by providing the network with the ability to be more responsive over low-speed or unreliable network connections or when a user moves from one wireless network

connection to another. This approach enables Microsoft Office Outlook 2003 to remain usable and when combined with the cached exchange mode, actually hides the network reliability from the user almost entirely. The result: no more connection error messages.

The intelligent connectivity feature is turned on by default. Users can select a fully automatic mode, a fast network mode designed for messaging on high-speed networks, and a slow (headers-only) mode designed for low-bandwidth or high-latency networks.

Direct HTTP Connections to Computers Running Exchange Server

Getting access to a computer running Microsoft Exchange Server by using Outlook client software has traditionally required direct access to the server, either through a local area network (LAN) connection or by connecting remotely through a VPN connection. With Microsoft Office Outlook 2003 and Exchange Server 2003 running on Microsoft Windows Server 2003, users can get access to their mail directly by using HTTP from any Internet-capable connection. With Microsoft Office Outlook 2003, wherever users can browse the Internet, they can access their Exchange Server 2003 client mailbox.

After this feature is installed and configured, Microsoft Office Outlook 2003 uses HTTP to automatically connect to computers running Exchange Server whenever a direct connection is unavailable. This approach, which eliminates the need to have corporate VPN servers set up to provide e-mail access, helps organizations avoid additional IT operations costs and keep their TCO low.

Buffer Packing

After data compression, all information sent from servers running Exchange Server 2003 to Microsoft Office Outlook 2003 clients is packaged in larger, optimized buffer packets. This approach reduces the number of requests to and from the servers running Exchange Server.

Improved Mail Compression

In environment that include Microsoft Office Outlook 2003 and Exchange Server 2003, all HTML mailbox content and any associated attachments are compressed on the computer running Exchange Server 2003 before the data is sent to Microsoft Office Outlook 2003 clients. This strategy significantly reduces network traffic between the client and server and can enable the consolidation of Exchange Server 2003 sites if they are upgraded from earlier versions of Exchange and Outlook combinations.

Improved Synchronization

In earlier versions of Microsoft Outlook, when interruptions occurred during offline synchronization, the entire process had to start over. Incremental change synchronization capabilities of Microsoft Office Outlook 2003 and Exchange 2003 enable the synchronization process to resume rather than restart from the beginning.

In earlier versions of Microsoft Outlook, the entire message was sent back to the server. In Microsoft Office Outlook 2003, when items are marked as read or unread, flagged, or slightly modified in other ways, only the header that lists the change is sent back to the server.

During synchronization, items marked as bad or conflicting are now moved to the Sync Items folder, which enables the synchronization process to continue without interruption.

The synchronization progress meter found in the lower right corner of the Microsoft Office Outlook 2003 user interface shows detailed synchronization information such as new e-mail headers, total size left to synchronize, and whether the folder is current.

Outlook Performance Monitoring

In Microsoft Office Outlook 2003, it is easier to monitor network performance problems and plan for a superior user experience. Latency and error information is collected from Outlook clients and sent to computers running Exchange Server 2003. This data is held in the Exchange Server 2003 data store and reported in the event log and performance counters, where the information can be opened with Microsoft Operations Manager. Interpreting the Exchange Server 2003 event logs or a third-party tool can help to determine whether remote client PC performance problems are related to poor bandwidth or connectivity.

Kerberos Authentication

Microsoft Office Outlook 2003 now includes support for the Kerberos protocol, which can authenticate security-related information against servers running Microsoft Exchange Server products. If an enterprise employs Windows Server 2003 domain controllers, users can authenticate their credentials across multiple Windows forests to domain controllers in trusted forests, an approach that enables user accounts and resources to exist in different forests.

Windows Server 2003

Running Office 2003 applications in an environment that includes Microsoft Windows 2003 enables IT professionals to extend the native capabilities of Microsoft Office Outlook 2003 in scenarios that require team- and group-level collaboration and communication and protection of corporate intellectual property.

Windows SharePoint Services

Windows SharePoint Services, a component of the Windows Server 2003 information worker infrastructure, provides team services and collaboration sites to Microsoft Office Outlook 2003 and other Office 2003 desktop programs. The integration between Windows Server 2003 and Windows SharePoint Services provides IT professionals with the following benefits:

- **Flexible, secure site management.** SharePoint Services site managers can customize the content and layout of sites to ensure that site members can access and work with important and relevant information. Member participation can also be monitored and moderated when necessary. Security and task responsibilities are both flexible and easily accessible. Well-designed lists and entire sites can be saved as templates and reused by individuals, teams, or business units across an organization.
- **Scalable collaboration sites.** Windows SharePoint Services can scale to thousands of sites within an organization. It fully supports load-balanced Web farm and clustered database deployments. Site and server managers can set and enforce quotas on storage, sites per server and users per site. Site usage can be monitored to detect and retire inactive sites. Server managers can delegate to end users the

ability to create their own sites. Sites and servers can be managed from a Web browser, command-line tools, or a Web service-accessible object model.

- **Workgroup server.** Small businesses can use Windows SharePoint Services as a small workgroup server that enables shared contacts and scheduling without using a computer running Microsoft Exchange Server.

Rights Management Requirements

Environments that include Microsoft Office Outlook 2003 and Windows SharePoint Services and that require Rights Management functionality must run Windows Server 2003 and include a premium Client Access License (CAL). For customers, whose networks do not run Windows Server 2003, Microsoft will host a Rights Management service that enables users to share protected documents and e-mail messages by using Microsoft .NET Passport® rather than the Active Directory directory service as the authentication mechanism.

SharePoint Portal Server

Using Microsoft Office Outlook 2003 in an environment that includes servers running Microsoft SharePoint Portal Server can significantly improve the ability of information workers to collaborate more effectively. In the Office 2003 task pane, users can view the collaboration context from a server running Windows SharePoint Services, directly within their application as they edit a document. Users can use SharePoint Portal Server to perform enterprise-level data searches, exchange scheduling tools that help them to assign tasks and deadlines, and easily review the status of a document project throughout an organization.

Within this integrated environment, users can open calendar, event, and contact lists within the Microsoft Office Outlook 2003 user interface as a read-only file. The data from Windows SharePoint Services looks and behaves like native Outlook calendar and contact information, including the ability of users to open up calendars side by side.

Live Communications Server

Microsoft Office Live Communications Server is an extensible, easy-to-manage instant messaging server that enables users to communicate in real time in a more secure way than is possible with consumer-oriented services.

Live Communications Server makes it possible to incorporate presence, the knowledge of whether a person is online and available, into Microsoft Office Outlook 2003. This approach is designed to foster instant communication and collaboration among information workers within and between enterprises.

For example, when a users receives an e-mail message in Microsoft Office Outlook 2003, they can see whether the sender is online and available and initiate an instant messaging conversation with the sender from within the e-mail message. Information workers visiting a portal created by Microsoft Office SharePoint Portal Server 2003 can notice the presence of their teammates and initiate instant collaboration sessions within the portal environment.

Appendix A: Microsoft Outlook Comparison Matrix

The following tables compare features offered in the four most recent versions of Microsoft Outlook.

Interface	Outlook 2003	Outlook XP	Outlook 2000	Outlook 97
<i>Research Library Task Pane</i>	X	--	--	--
<i>Reading Layout Mode</i>	X	--	--	--
<i>Address properties available from Reading pane</i>	X	--	--	--
<i>Notification Area Icon</i>	X	X	--	--
<i>Outlook Today</i>	X	X	X	--
<i>Group items by any field</i>	X	X	X	--
<i>Local folders</i>	X	X	X	X
<i>Reminder Window</i>	X	X	X	X
<i>Customizable toolbars</i>	X	X	X	X
<i>Help</i>	X	X	X	X
<i>Navigation Pane</i>	X	X	X	X
<i>Shortcuts</i>	X	X	X	X

Messaging	Outlook 2003	Outlook XP	Outlook 2000	Outlook 97
Read messages				
<i>Auto Preview</i>	X	X	X	X
<i>Folder hierarchy in Navigation Pane</i>	X	X	X	X
<i>Favorite folders in Navigation Pane</i>	X	X	X	X
<i>Navigate hyperlinks in messages</i>	X	X	X	X
<i>Attachments can be opened from Reading/Preview Pane</i>	X	X	--	--
<i>Appointment accept/decline functionality in Preview/Reading Pane</i>	X	X	--	--
<i>Unlimited number of messages displayed in mail view</i>	X	---	--	--

Messaging (continued)	Outlook 2003	Outlook XP	Outlook 2000	Outlook 97
Send messages				
<i>AutoAddress/AutoName</i>	X	--	X	X
<i>Insert hyperlinks in message text</i>	X	X	X	X
<i>Information bar available in preview/reading pane</i>	X	X	--	--
<i>Send/receive attachments</i>	X	X	X	X
<i>AutoComplete Addressing</i>	X	X	--	--
<i>Send Using (E-mail Account Selection)</i>	X	X	--	--
<i>Distribution lists</i>	X	X	X	--
<i>Insert other e-mail messages as attachments</i>	X	X	X	X
<i>Live attachments</i>	X	--	--	--
<i>Embed documents in messages</i>	X	X	X	X
<i>Request read or delivery receipt</i>	X	X	X	X
<i>Word as E-Mail Editor (Wordmail)</i>	X	X	X	X
<i>Spell checking</i>	X	X	X	X
<i>Background/AutoCorrect spelling (Word Mail)</i>	X	X	--	--
<i>Add words to spell check dictionaries</i>	X	X	X	X
<i>Recall Message</i>	X	X	X	X
<i>Auto-select Message Encoding</i>	X	X	--	--
<i>Send mail message with Voting buttons (AutoVote)</i>	X	X	X	X
<i>Track delivery and read receipts with original message</i>	X	X	X	X
<i>Create messages from Address Book</i>	X	X	--	--
<i>Receive HTML mail</i>	X	X		
<i>HTML editing</i>	X	X	X	--
<i>Plain-text editing</i>	X	X	X	X
<i>RTF editing</i>	X	X	X	--

Messaging (continued)	Outlook 2003	Outlook XP	Outlook 2000	Outlook 97
Send messages (continued)				
<i>Automatic formatting of messages with color based on criteria</i>	X	X	X	--
<i>AutoText</i>	X	X	--	--
<i>Automatic text corrections (Word Mail)</i>	X	X	--	--
<i>AutoSignature</i>	X	X	X	X
<i>Insert signature on demand</i>	X	X	X	X
<i>Multiple signatures</i>	X	X	X	X
<i>Include vCard in signature</i>	X	X	X	--
<i>Set message importance</i>	X	X	X	X
<i>Message sensitivity</i>	X	X	X	X
<i>Message expiration</i>	X	X	X	X
<i>Deferred delivery (with or without rules)</i>	X	X	X	X
<i>Message templates</i>	X	X	X	X
<i>Default font for new messages</i>	X	X	X	X
<i>Default font for replies and forwards</i>	X	X	X	X
<i>Redirected replies</i>	X	X	--	--
<i>File routing</i>	X	X	--	--
<i>Internet Faxing</i>	X	--	X	--
Receive/reply to messages				
<i>New Mail Notification</i>	X	X	X	X
<i>Respond to mail message with Voting buttons</i>	X	X	X	X
<i>Reply in same format received</i>	X	X	--	--
<i>No indentation of reply/forward bodies</i>	X	X	X	--
Search for messages				
<i>Find</i>	X	X	X	X
<i>Search capabilities (Advanced Find)</i>	X	X	X	X
<i>Search folders</i>	X	--	--	--

Messaging (continued)	Outlook 2003	Outlook XP	Outlook 2000	Outlook 97
Organize messages				
<i>Quick Flags/Message flags</i>	X	X	X	X
<i>Categories and Master Category List</i>	X	X	X	X
<i>Drag and drop messages</i>	X	X	X	X
<i>Multiple views</i>	X	X	X	X
<i>Arrange By</i>	X	X	X	--
<i>Arrange by Conversation</i>	X	--	X	--
<i>View by category</i>	X	--	--	--
<i>View mail by follow-up flag</i>	X	--	X	X
<i>Public Folders</i>	X	X	X	X
<i>Sort message list by standard fields</i>	X	X	X	X
<i>Set order/size of columns in message list¹</i>	X	X	X	X
<i>Enhanced conversation management</i>	X	X	X	--
<i>Manage messages by group</i>	X	X	X	X
<i>For Follow-Up folder</i>	X	--	--	--
<i>Display custom views</i>	X	X	X	X
<i>Create custom views</i>	X	X	X	X
<i>Mark message as read or unread</i>	X	X	X	X
<i>Recover deleted messages</i>	X	X	X	X
<i>User saves e-mail messages to Drafts</i>	X	X	--	--
<i>Mailbox Cleanup</i>	X	X	--	--
<i>Ability to disable individual rules</i>	X	X	X	--
<i>AutoArchive</i>	X	X	X	X
<i>E-mail Account Setup Wizard</i>	X	X	--	--
<i>Test E-Mail Account tool</i>	X	X	--	--
<i>Drafts folder</i>	X	X	X	--

¹ The Outlook client must be used to create and store views on the Exchange Server. Outlook Web Access cannot display the full range of views that can be created in Outlook.

Messaging (continued)	Outlook 2003	Outlook XP	Outlook 2000	Outlook 97
Manage messages (continued)				
User-configurable Delegate Access permissions	X	X	--	--
User configures Public Folder permissions	X	X	--	--

Collaboration Features	Outlook 2003	Outlook XP	Outlook 2000	Outlook 97
Document workspaces	X	--	--	--
Meeting workspaces	X	--	--	--
Windows SharePoint Services / SharePoint Team Services integration	X	X	--	--
Instant messaging	X	X	--	--

Calendar	Outlook 2003	Outlook XP	Outlook 2000	Outlook 97
Calendar views of different time periods	X	X	X	X
Calendar preferences	X	X	X	x
Side-by-side viewing of multiple calendars	X	--	--	--
Meeting reminders (minutes, hours, or days in advance)	X	X	X	X
Color individual or recurring appointments	X	X	--	---
Notification of adjacent or conflicting appointments	X	X	--	--
Lunar Calendar Support	X	X	--	--
Offline use of calendar	X	X	X	X

Schedule Meetings	Outlook 2003	Outlook XP	Outlook 2000	Outlook 97
<i>Plan a face-to-face meeting</i>	X	X	X	X
<i>View other user's free/busy information</i>	X	X	X	X
<i>Propose New Time</i>	X	X	--	--
<i>Appointments summarized in Outlook Today</i>	X	X	X	--
<i>Invoke calendar from meeting request to see full schedule</i>	X	X	--	--
<i>Include attachments in appointments and meeting requests</i>	X	X	--	--
<i>Insert e-mail messages as attachments in appointments and meeting requests</i>	X	X	--	--
<i>Create a Meeting Workspace in a meeting request</i>	X	--	--	--
<i>Track acceptance of attendees to a meeting</i>	X	X	--	--
<i>Attendee list visible to all attendees</i>	X	X	--	--
<i>Send or receive requests over the Internet as calendar attachments</i>	X	X	X	--
<i>Publish and retrieve free and busy information to the Internet with iCalendar subset</i>	X	X	--	--
<i>Advanced, automatic meeting-request processing options</i>	X	X	--	--
<i>Plan online meeting (NetMeeting)</i>	X	X	X	--
<i>Microsoft Exchange Conferencing</i>	X	X	X	--
<i>Use Address Book to pick attendees</i>	X	X	X	--
<i>Free and busy view</i>	X	X	X	X
<i>Forward or reply to a meeting request</i>	X	X	X	X
<i>All-day events</i>	X	X	X	X

Address Book and Global Address List	Outlook 2003	Outlook XP	Outlook 2000	Outlook 97
<i>Address Book</i>	X	X	X	X
<i>Browsable Global Address List (GAL)</i>	X	X	X	--
<i>Access to general GAL properties (name, address, phone)</i>	X	X	X	X
<i>Access to advanced GAL properties (org chart, DL membership)</i>	X	X	X	--
<i>Synchronized offline GAL</i>	X	X	--	X

Contacts	Outlook 2003	Outlook XP	Outlook 2000	Outlook 97
<i>Business Contact Manager</i>	X	--	--	--
<i>Contact picture</i>	X	--	--	--
<i>Use e-mail properties to add Contacts data</i>	X	X	--	--
<i>Use contact information in mail merge</i>	X	X	X	X
<i>Contact activity tracking</i>	X	X	X	X
<i>View by company</i>	X	--	--	--
<i>Print address cards</i>	X	X	X	X
<i>Important dates (birthdays and anniversaries) in Contacts listings</i>	X	X	X	X
<i>Exchange virtual business cards (vCards)</i>	X	X	X	X
<i>Shared contacts</i>	X	X	--	X
<i>View contacts by follow-up flag</i>	X	--	X	X
<i>Internet addresses listed in Contacts.</i>	X	X	X	X
<i>Multiple addresses in Contacts items</i>	X	X	X	X
<i>Add/edit contacts</i>	X	X	X	X
<i>Send new message to contact</i>	X	X	X	X
<i>More than one physical and e-mail address listed in Contacts</i>	X	X	X	X

Tasks	Outlook 2003	Outlook XP	Outlook 2000	Outlook 97
<i>Create and manage tasks</i>	X	X	X	X
<i>Create task from e-mail message</i>	X	X	X	X
<i>Simple and Detailed task views</i>	X	X	X	X
<i>View tasks by category</i>	X	X	X	X
<i>View by active/completed/overdue status</i>	X	X	X	X
<i>Edit tasks in view</i>	X	X	X	X
<i>Task reminders</i>	X	X	X	X
<i>Task requests and tracking</i>	X	X	X	X
<i>Tasks timeline view</i>	X	X	X	X
<i>TaskPad view in Calendar</i>	X	X	X	X

Client Services	Outlook 2003	Outlook XP	Outlook 2000	Outlook 97
<i>Alerts</i>	X	X	x	--
<i>Outlook Custom Installation Wizard</i>	X	X	X	--
<i>Out of Office Assistant</i>	X	X	X	X
<i>Recover Application</i>	X	X	--	--
<i>Read-only Delegate Access to messages and other information</i>	X	X	X	x
<i>Editable Delegate Access of messages to other accounts</i>	X	X	X	X
<i>AutoCreate</i>	X	X	X	X
<i>Import/Export files</i>	X	X	X	X
<i>Client-side Setup Wizard</i>	X	--	X	--
<i>Lunar Calendar Support</i>	X	X	--	--
<i>Outlook Hotmail Support</i>	X	X	--	--
<i>Custom forms</i>	X	X	X	X
<i>Consolidated offline settings</i>	X	X	--	--
<i>Support for IMAP4ⁱ, POP3, and SMTP</i>	X	X	X	X

Security and Content Management	Outlook 2003	Outlook XP	Outlook 2000	Outlook 97
<i>Information Rights Management</i>	X	--	--	--
<i>Junk E-Mail Filters</i>	X	--	--	--
<i>Junk E-Mail Folder</i>	X	X	--	--
<i>Trusted Senders and Trusted Recipients Lists</i>	X	--	--	--
<i>Block External Content</i>	X	X	--	--
<i>Block attachments</i>	X	X	--	--
<i>Anti-virus enhancements</i>	X	X	--	--
<i>Digital signature</i>	X	X	X	X
<i>Digital encryption</i>	X	X	X	X
<i>Single sign-on</i>	X	--	--	--
<i>Certificate management</i>	X	X	--	--
<i>Kerberos Authentication</i>	X	--	--	--
<i>Automatic logoff after inactive period</i>	--	--	--	--
<i>Journal</i>	X	X	X	X
<i>Notes</i>	X	X	X	X

Integration with Microsoft Servers	Outlook 2003	Outlook XP	Outlook 2000	Outlook 97
<i>Integration with SharePoint Portal Server</i>	X	--	--	--
<i>Live Communications Server integration</i>	X	--	--	--
<i>Cached exchange mode</i>	X	--	--	--
<i>Intelligent Connectivity</i>	X	--	--	--
<i>RPC Connectivity to Exchange via HTTP</i>	X	--	--	--
<i>Synchronization groups</i>	X	X	X	
<i>Background synchronization of local and server folders</i>	X	X	--	--
<i>Differential, offline address-book synchronization with server</i>	X	X	--	--

Outlook Performance Improvements (continued)	Outlook 2003	Outlook XP	Outlook 2000	Outlook 97
<i>Incremental change synchronization</i>	X	--	--	--
<i>Smart change synchronization</i>	X	--	--	--
<i>Pre-synchronization reporting</i>	X	--	--	--
<i>Offline synchronization</i>	X	X	X	X
<i>Buffer packing</i>	X	--	--	--
<i>MAPI compression</i>	X	X	--	--
<i>Skip bad items</i>	X	--	--	--
<i>Outlook performance monitoring</i>	X	--	--	--
<i>Unicode PST Support</i>	X	X	--	--
<i>Cancel request to server</i>	X	X	--	--
<i>Send and Receive groups</i>	X	--	--	--
<i>LDAP support and default list</i>	X	X	--	--

Key	Meaning
X	Feature is included in product version.
--	Product information was reviewed but did not mention this feature.
NA	The feature is not applicable to this version or product.