

Hosted Exchange End User Quick Reference Guide

Using Microsoft Outlook 2003



DO MORE FROM YOUR DESKTOP WITH OUTLOOK 2003!

Welcome to the Messaging Quick Reference Guide. This guide demonstrates how the new and improved features in Microsoft Outlook 2003 and Hosted Exchange can be used to help you work more efficiently and effectively. After reading this guide you will be able to use Search Folders, Quick Flags, and Rules to help manage and organize your e-mail. You'll be able to create secure and customizable collaboration environments in Meeting Workspaces, send faxes from your desktop, work in Cached Mode, and connect from a remote location using Mobile Messaging. You will also learn more about Messaging Security Options, Trustworthy Messaging, Spam Management, and other useful messaging service developments. We hope you find the information in this guide helpful and will keep it handy for future reference.



SEE TWICE AS MUCH CONTENT

In Outlook 2003, you can change the position of the preview pane from the familiar view at the bottom of the screen to an "out of the way" view on the right side of the screen. This allows twice as much of your e-mail content to appear on the screen making reading your e-mail easier than ever.



FOLLOW LONG E-MAIL THREADS

You won't lose the thread in Outlook 2003 because this messaging client can display them in a compressed, non-cluttered form that makes conversations easier to follow and the Inbox appear less crowded. Threads can also be managed as a block of text rather than individually through multiple steps.



NAVIGATE WITH CONFIDENCE

Working in Outlook 2003 is easier than ever with the new Outlook Navigation Bar. This navigation reference allows you to easily transition from e-mail to tasks to frequently used activities. Search Folders are a special feature within the Outlook Navigation Bar that you can learn more about on Page 3.

Cached Exchange Mode



Cached Exchange Mode virtually eliminates delay connections found with legacy versions of Outlook when it had difficulties contacting the Exchange server. Because Outlook 2003 can automatically detect your network conditions, it switches between the local mailbox and the Exchange server mailbox to provide the optimal experience.

CACHED EXCHANGE MODE

Cached Exchange mode always knows the status of the connection to the messaging server to determine online/offline status. Using Outlook 2003 with the "Use Local Copy of Mailbox" (Cached Exchange Mode) option enabled provides a better user experience when a connection to the Microsoft Exchange server is slow or unavailable. By providing different levels of optimization, Outlook 2003 automatically detects and adapts to changing connection environments, such as disconnecting from a corporate LAN, going offline, and then re-establishing a connection to the server via a dial-up connection.

AUTOMATIC SYNCHRONIZATION WITH EXCHANGE SERVER

Outlook relies on server-to-client notifications to determine when there are changes on the server that need to be downloaded. You no longer need to do manual refreshes to ensure your local mailbox is up to date. When operating in Cached mode, the notification process ensures that your local mailbox is always up to date.

BENEFITS OF CACHED MODE

In Cached Exchange Mode users work from a local copy of the mailbox called the OST file. Simultaneously, in the background, Outlook 2003 synchronizes data from the Exchange server to the local copy of the mailbox.

More reasons to take advantage of Cached Exchange Mode include:

- Take advantage of Outlook's new Junk E-mail filtering while running in Cached Exchange Mode.
- E-mail is stored both locally and also on the Exchange Server Store.
- Access e-mail via other technologies such as OWA, OMA, EAS and RPC over HTTP, because your e-mail is stored and accessible from the server store (mailbox).

NETWORK DEPENDENT CACHED MODE PROCESSES

Some Outlook functions reduce the effectiveness of Cached Exchange Mode because they require network access or bypass designed Cached Exchange Mode functionality. The primary benefit of using Cached Exchange Mode is the reduction in network and server connection reliance. Features that rely on network access can cause delays in Outlook responsiveness or performance. Network dependent features include:

- Delegate access
- Opening another user's calendar or folders
- Accessing a public folder that has not been cached

These Outlook features require network access to retrieve necessary information which can cause a delayed response. These delays can occur intermittently rather than when the feature is accessed by the user.

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Trustworthy Messaging

Security is one of high importance for any organization and utilizing secure e-mail (S/MIME) are great ways to make your e-mail more secure. The following guidelines should help you decide when to use each of these technologies.

When to use IRM to Protect Content: You should use IRM in all Office 2003 products if you want to control who can access your content and also control what those people can do with that content. IRM should meet most of your internal security messaging needs. See the accompanying section titled Information Rights Management for more information about IRM.

When to use S/MIME to Digitally Sign: You should digitally sign e-mail if you need to prove to your recipients that you are who you say you are and that the content was not tampered with in transit. S/MIME signing will not prevent unauthorized people from viewing the content.

When to use S/MIME to Encrypt E-mail: Like IRM, you should use S/MIME to encrypt if you want to control who can access your e-mail content, but you also want to force the recipients to enter a password to further validate their credentials. S/MIME is more appropriate than IRM for most external e-mail scenarios, due to its foundation on industry standards.

E-MAIL SIZE IMPACT USING S/MIME AND IRM

It is important to realize that S/MIME and IRM result in an increase to the size of the e-mail you are sending. Please review the table included in this section to see samples of the size changes when using the different options for securing your email communications.

Type	Normal	S/MIME	IRM
RTF 1 line	3K	7K	12K
RTF 1 page	4K	15K	15K
RTF 10 pages	12K	94K	53K
HTML 1 line	3K	7K	7K
HTML 1 page	9K	15K	15K
HTML 10 pages	57K	86K	42K

NOTE: It is not recommended that you use S/MIME and/or IRM on all e-mail by default.

Instead, choose when to use these technologies where they make the most sense for your specific business e-mail needs.

Information Rights Management

IRM is an exciting feature in Office 2003 that allows you to control the distribution and usage of documents and e-mail. IRM spans Word, Excel, PowerPoint, and Outlook and helps to meet the following scenarios:

- Write an e-mail that can not be forwarded
- Collaborate on time-sensitive information that will become inaccessible after a certain time.
- Create documents and e-mail marked "Company Confidential" that stay inside Company and are inaccessible to unauthorized users.

WHY USE IRM

Using IRM on documents and e-mail means you can control their distribution and usage. This means that information marked "Do Not Forward" won't be, unless the user is intentionally and maliciously trying to redistribute your content to others.

You should use IRM only on sensitive information. If you are writing a document or e-mail and think "I wish there was a way I could control where this information goes," then IRM is appropriate. *Note: Only users with Office 2003 or the RMA for Internet Explorer 6.0 will be able to view the IRM-protected material you send.*

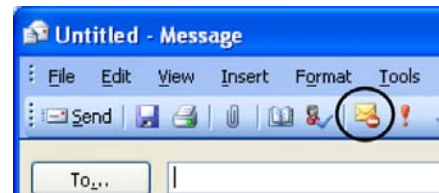
KEY FEATURES OF IRM INCLUDE

"Do Not Forward" E-mail: Create protected e-mail messages that prevent recipients from forwarding, printing, or copying information.

Document Permission: Create Word, Excel, and PowerPoint documents that only designated users can read, preventing them from extracting your information and/or repurposing it without your permission.

Information Expiration: Specify how long your information is accessible. After the expiration date you set has passed, users will no longer be able to view the protected information.

Protect From Prying Eyes: IRM uses strong encryption to ensure that people without permission cannot get access.



HOW TO USE IRM

To apply IRM permissions, click the circular red button located in each Office application toolbar.

Search Folders



SEARCH FOLDERS OVERVIEW

Search Folders help users spend less time finding e-mail messages. Search Folders are live search results that look and act like folders, but 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 can be quickly set up with a number of pre-designed options, such as e-mail flagged "For Follow Up" or "Unread Mail." You can also create your own custom Search Folders, defining specific search criteria that an e-mail must meet to be displayed in the folder.

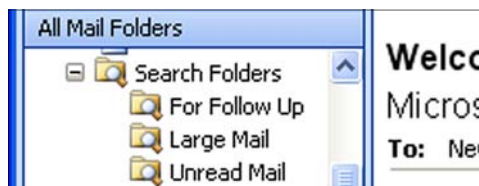
USING SEARCH FOLDERS

Three Search Folders are created by default:

For Follow Up: This folder provides a virtual to-do list of all Quick Flagged messages.

Large Mail: This folder assists with mailbox cleanup by showing the largest e-mail messages from across the entire mailbox.

Unread Mail: All of a user's unread e-mail



messages on the server regardless of their folder, are shown in the Unread Mail search folder.

CREATING A NEW SEARCH FOLDER

1. Under **File**, select **New, Search Folder**.
2. Select the type of Search Folder you want in the **New Search Folder** dialog.
3. Select **Custom Search Folder**.
4. Click **OK** and follow on-screen instructions.

CUSTOMIZING SEARCH FOLDER SEARCHES

By default a Search Folder will search through all of the folders in your entire Mailbox including sent and deleted items. To customize the search:

1. Right click on a Search Folder and select **Customize this Search Folder**.
2. Click the **Browse** button. The **Select Folder(s)** dialog will appear.
3. Click the **Clear All** button.
4. Select the folders to be searched and click **OK**.

Side-by-Side Calendars



OVERVIEW

Outlook 2003 makes it possible to view multiple calendars side-by-side in the Outlook window including local, public folder, other users' calendars. The calendars scroll together and are color-coded, making them useful for comparing schedules. 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. *Note: This feature requires network connectivity. This feature is not available while working Offline.*

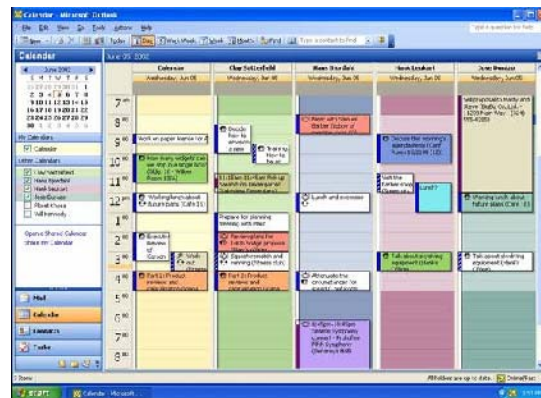
VIEW MULTIPLE CALENDARS SIDE-BY-SIDE

When you click on the **Open Shared Calendar** hyperlink, a dialog appears to specify which contact's calendar you would like to open.

Selected calendars will be listed along side of your calendar. This gives a great "at a glance" view of schedules.

This feature requires viewing permissions to be set on each calendar you wish to view. Users can view calendars side-by-side by clicking the checkbox next to the calendar name.

To open another user's calendar, Click **Open a Shared Calendar**. To share your calendar with others, click **Share My Calendar** and assign permissions.



Quick Flags



QUICK FLAGS - A QUICK ORGANIZER

Through a study of Outlook users, Microsoft found that most people do one of three things with nearly every e-mail message:

1. They respond to it immediately
2. They delete or file it immediately
3. They decide to follow-up on it later

There are almost as many approaches to No. 3 as there are users: Mark the message as unread, move it to a mail folder called To Do, make a task out of it, rigorously delete or file all messages that don't require a response, etc. Each one of these is

inefficient and takes a lot of extra time, even though each strategy may work for a particular user.

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

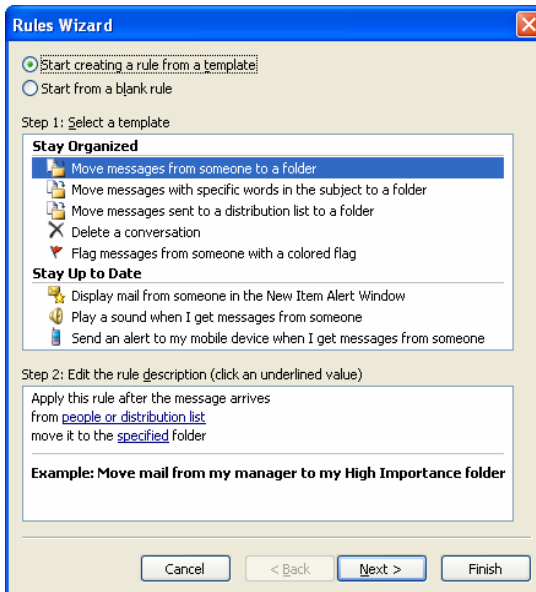
Organize E-mail with Rules



CREATE CUSTOM RULES FROM SCRATCH OR USING TEMPLATES

Custom Outlook rules save time and makes e-mail organization much simpler by automatically performing many actions based on the criteria you establish.

1. Click on the **Inbox** folder.
2. Select **Rules and Alerts...** from the **Tools** menu.
3. Click on **New Rule...** to launch the Rules Wizard.
 - If you want to use a template with pre-specified actions and conditions, Click **Start creating a rule from a template**.
 - If you want to use custom conditions and actions, Click **Start from a blank rule**.
4. Follow the instructions in the **Rules Wizard**.
5. If you want to run the newly created rule on messages already in the Inbox, select the **Run this rule now on messages already in Inbox** check box on the last page of the Rules Wizard.
6. (*Optional*) If you have more than one email account or Inbox you can have this rule apply to all of them,



select the "Create this rule on all accounts" check box on the last page of the Rules Wizard.

Quick Tip

If you want to create a rule based on a message, right-click the message on which you want to base a rule, and then click **Create Rule**.

Spam Management

Spam continues to be a growing problem for many companies. Spammers often use special techniques designed to collect e-mail addresses from newsgroups, mailing lists and other programs.

TIPS TO PREVENT SPAM

1. Never use your business e-mail address to enter online contests.
2. Do not use your business e-mail account to purchase anything from unsolicited e-mail.
3. Never reply to unsolicited e-mail.
4. Never "unsubscribe" to unsolicited e-mail.

BLOCKING SPAM AT THE INTERNET GATEWAY

Spam impacts end-user productivity by forcing people to view unnecessary and sometimes offensive e-mail. Spam management solution are built on an advanced Exchange and Windows platform incorporating 3rd-party Anti-spam products. Its intent is to eliminate spam at our Internet boundary gateway servers.

It is important to note that no anti-spam solution is 100% effective; therefore some spam e-mail will continue to be delivered to your mailbox. Outlook 2003 ships with an enhanced Junk E-mail filter which is designed to assist users with processing the spam that does get delivered to their mailbox.

The new Junk E-mail filter allows users to specify safe senders and recipients. Unwanted domains and senders can also be easily added to the junk senders list with a few simple mouse clicks. *Note: The new Junk E-Mail filter is only available while using Cached Mode. (See page #1 for information on Cached Mode).*

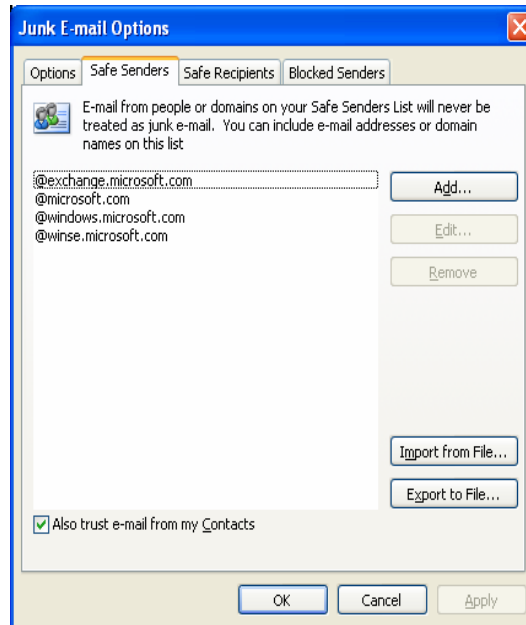
FALSE POSITIVES

Occasionally, the Outlook 2003 filter might incorrectly classify a message as spam and move

it to the Junk E-mail folder. It is important to check the Junk E-mail folder regularly to ensure legitimate e-mail has not been routed there by mistake. If you do find legitimate e-mail in this folder simply highlight the e-mail, right click, select Junk E-mail from the menu and choose the appropriate action.

TRUSTED SENDERS

The Trusted Senders tab allows you to specifically add senders that you trust not to be spammers. All messages from those listed will be delivered directly to your Inbox. The **Also trust e-mail from my Contacts** is checked by default. This automatically adds the e-mail addresses of your contacts to this trusted list.

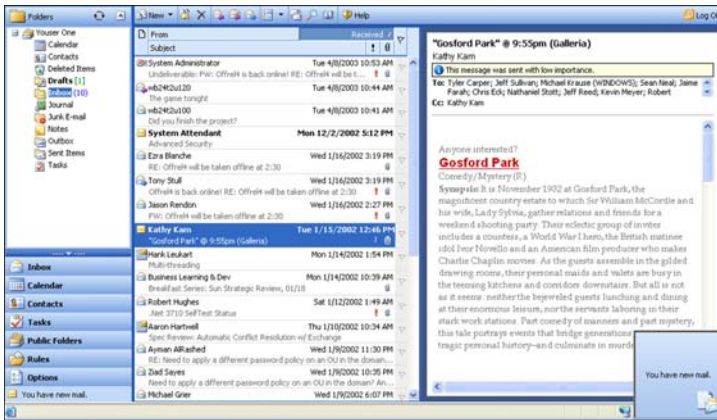


Mobile Messaging

MOBILE MESSAGING: OWA, OMA, EAS and RPC over HTTP

Wherever you are in the world, your Hosted Exchange mailbox is as close as the nearest Internet connection. DanDomain is pleased to offer users secure access to their business mailbox from any secure Internet connection via Outlook Web Access (OWA) or any secure wireless Internet connection via Outlook Mobile Access (OMA) & Exchange ActiveSync (EAS).

Outlook Web Access (OWA)



Quick Tip

VIEW ADDITIONAL MAILBOXES

You can open any additional mailbox that has your personal e-mail profile has access to. Once these steps are complete you will find the additional mailbox in the folder view along with the original mailbox.

1. In Outlook, select E-mail Accounts from the Tools menu.
2. Under E-mail, select View or change existing e-mail accounts, and then click Next.
3. Click Change, then More Settings.
4. On the Advanced tab click Add.
5. In the Add Mailbox dialog, type the alias for the mailbox to be added and click OK.

OWA is now a truly full-featured e-mail application that provides an experience similar to Outlook 2003.

OWA URLs

Wherever you are in the world, using the new access URL associated with your region or domain ensures that you are getting the best possible OWA performance. Even when traveling outside your home region, your regional URL provides the best performance.

TO ACCESS OWA

Enter the OWA URL for your region (don't forget the "s" in https!). When prompted, enter your domain\alias and corporate password.

OMA & EAS offer users real-time access and synchronization to corporate e-mail from any supported mobile device with Internet or Wireless LAN access, at any time, from anywhere.

- Use OMA to browse your mailbox via your mobile device.
- Use EAS to synchronize your Windows Mobile device with your mailbox. After synchronization, you can work offline.

Because OMA & EAS are fully integrated features of Exchange Server 2003, you automatically have access—no need to sign up!

Recover Deleted Items

If you find that you deleted an e-mail by mistake there is a way to recover those e-mail items up to three days after deletion, even if you empty your deleted items folder upon exit.

1. Open the deleted items folder.
2. Select Recover Deleted Items from the Tools menu.
3. Search for e-mails deleted by mistake and highlight.
4. Click the Recover Selected Items icon.

