

QuickStart Tool

Microsoft Outlook 2003

By Jim Boyce

Microsoft has made some significant changes in Outlook with the 2003 version that improve usability and make it a better choice both for users and administrators. An understanding of Outlook 2003's new features will help you get the most out of the application. This QuickStart Tool will help you explore these new features, learn about Outlook's strengths and weaknesses, decide whether an upgrade is right for you, and explore links where you can find additional information about Outlook 2003.

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New features

The latest release of Outlook offers some interesting new features, particularly when used with Exchange Server. Some of these new features include:

- **Cached Exchange Mode.** This mode works in conjunction with Exchange Server to provide a synchronized local copy of your Exchange Server mailbox. Cached Exchange Mode is similar to using a set of offline folders in previous Outlook versions, but Cached Exchange Mode detects the server connection status and synchronizes folders with the server automatically.
- **RPC Over HTTP.** This new feature, which requires Exchange Server 2003 on the back end, enables Outlook users to connect to Exchange Server with HTTP. Access through HTTP eliminates the need for remote users to use VPN connections to the server or for administrators to open additional ports in the firewall, thereby increasing the network's attack surface. Remote users can continue to use Outlook to access their mailboxes rather than turn to Outlook Web Access or other remote solutions.
- **Spam blocking.** Outlook 2003 improves considerably its spam detection and blocking capabilities. In addition to improved detection mechanisms, Outlook 2003 offers a blacklist to block messages based on sender e-mail address or domain and whitelists to allow messages from specific senders or domains and messages sent to specific recipient addresses (useful for receiving list messages).
- **Web beacon blocking.** Outlook 2003 automatically blocks external HTML content in messages. Many spammers use this external content as a means of detecting valid addresses. Blocking the content can ultimately reduce spam and decrease the risk of malicious code.
- **Reading pane.** The new reading pane can be positioned on the right or bottom of the Outlook window and offers improved message preview.
- **Navigation pane.** The Outlook Bar is replaced in Outlook 2003 by the Navigation pane, which, like the Outlook Bar, resides at the left side of the Outlook window. The Navigation pane includes buttons that give you quick access to common Outlook folders, the folder tree, common views, the date navigator, and other Outlook items.
- **Search folders.** Search folders present the results of user-configured searches in a window that works like a mail folder and are extremely useful for locating messages that fit specific criteria. Outlook 2003 provides three default search folders—Unread Messages, For Follow Up, and Large Mail—but you can create your own search folders with your own criteria as needed.
- **Desktop alerts.** In addition to the other methods Outlook provides for notifying you when new messages arrive, Outlook 2003 offers desktop alerts, which are semitransparent popup windows that appear on the desktop near the tray when new messages arrive. You can disable desktop alerts or change their properties, such as transparency and length of time displayed.
- **Business Contact Manager.** Business Contact Manager is an add-on for Microsoft Outlook 2003 that provides a database-driven system for managing business contacts, sales leads, and products.
- **New rules and alerts interface.** The interface for creating and managing rules has been streamlined and improved in Outlook 2003, and an interface has been added to provide a single location for managing Office-compatible alerts such as those offered by Windows SharePoint Services.
- **Online status.** Outlook 2003 automatically displays the online status of contacts who send you messages (based on Windows Messenger contacts), and the Contacts folder shows the online status of contacts.

Working in Outlook

Enable Cached Exchange Mode

You enable Cached Exchange Mode in the properties for the Exchange Server account:

1. In Outlook, choose Tools | E-mail Accounts.
2. Choose View Or Change Existing E-Mail Accounts and click Next.
3. Select the Exchange Server account and click Change.
4. Select the Use Cached Exchange Mode check box, click Next, and click Finish.
5. Restart Outlook. It will create a local copy of your Exchange Server mailbox and synchronize the local copy with the remote mailbox.

Enable RPC over HTTP

To enable RPC over HTTP, you must install an update to your computer (if it has not already been installed). The following steps will help you determine whether the update is installed and add it if not. Note that you must be connecting to Exchange Server 2003 to use RPC over HTTP, and the server must be configured to support RPC over HTTP:

1. Choose Tools | E-mail Accounts, choose View Or Change Existing E-Mail Accounts, and click Next.
2. Select the Exchange Server account and click Change.
3. Click More Settings and then click the Connection tab.
4. If you do not see the option Connect To My Exchange Mailbox Using HTTP, you must install the update. If that's the case, click Cancel and move on to step 5. If you do see the option, skip to step 8.
5. In Internet Explorer, navigate to <http://support.microsoft.com/default.aspx?scid=kb:en-us:331320>.
6. Download and install the 331320 update on your computer and then restart Windows.
7. Repeat steps 1-4 to open the Connection tab of the Exchange Server account properties.
8. Select the option Connect To My Exchange Mailbox Using HTTP.
9. Click Exchange Proxy Settings and enter the URL and other settings provided by your Exchange Server administrator.
10. Click OK, click Next, and click Finish.

Configure spam blocking

You can configure Outlook 2003 to use one of four spam detection levels, configure the blacklist to block messages, and configure the whitelists to allow specific messages that would otherwise be treated as spam:

1. Choose Tools | Options and click Junk E-mail.
2. On the Options tab, choose the level of detection you want Outlook to use. Initially you should use either the Low or High option. However, if you want to block all messages that don't come from senders in your safe lists (whitelists), choose Safe Lists Only. Do not choose the option to permanently delete spam rather than move it to the Junk E-mail folder until you have run Outlook 2003 for several months and are no longer getting false positives for spam detection.
3. On the Safe Senders tab, add the addresses or domains from which you want to receive mail, regardless of the content.
4. On the Safe Recipients tab, add the e-mail addresses at which you receive incoming messages that are different from your primary e-mail address (such as discussion list addresses for lists in which you participate).
5. On the Blocked Senders tab, add the addresses or domains from which you do not want to receive messages. Messages from these senders or domains are treated as spam regardless of the content.

Block external Web content

Outlook 2003 automatically blocks external HTML content in messages. Here's how to configure content blocking:

1. Choose Tools | Options and click the Security tab.
2. Click Change Automatic Download Settings.
3. Enable the option Don't Download Pictures Or Other Content Automatically In HTML E-mail to prevent external content from being downloaded. Use the two related check boxes, if desired, to allow external content from senders and recipients in the safe lists or from sites in the Trusted zone.
4. Enable the option Warn Me Before Downloading Content When Editing, Forwarding, Or Replying To E-mail to have Outlook 2003 warn you when it is about to download external content for a message you are editing, forwarding, or replying to.

Change the Reading pane

The Reading pane replaces the Preview pane in previous versions of Outlook. You can place the Reading pane at the right or bottom of the Outlook window and also configure settings that determine how it works:

1. Choose View | Reading Pane and then select Right or Bottom, depending on where you want the pane to appear. Choose Off to hide the Reading pane.
2. Choose Tools | Options, click the Other tab, and click Reading Pane.
3. Use the options on the Reading Pane dialog box to set reading options.

Create a custom search folder

You can modify the existing search folders or create your own. Here's how to create a new search folder that organizes messages based on the criteria you specify:

1. Choose File | New | Search Folder.
2. In the New Search Folder dialog box, choose one of the predefined criteria and then specify the conditions and folders in which to search. For example, if you choose Old Mail as the criteria, click Choose to specify the age of messages to be included in the search. Or, if one of the predefined criteria doesn't suit your needs, choose Create A Custom Search Folder and then click Choose to specify the criteria and other options.

Outlook's strengths and weaknesses

Strengths

Streamlined interface	The changes to the Navigation pane, reading pane, and other interface elements make Outlook 2003 easier to use, particularly for casual users. You also have additional options for customizing the interface.
Spam blocking	Outlook 2003 does a good job of blocking spam, particularly when you take the time to build a comprehensive blacklist and safe lists. Outlook can automatically add addresses to the Safe Senders list when you reply to a message, making it easy to build the list over time.
More connection options	Cached Exchange Mode is a great option for users who occasionally work offline or whose connection to the server is either sometimes slow or intermittent. CEM's automatic synchronization eliminates the need for the users to worry about synchronizing folders. In addition, RPC over HTTP gives remote users an easy means of accessing their Exchange Server mailboxes without leaving Outlook or resorting to VPN connections. RPC over HTTP also can considerably simplify network configuration and management.
Better message organization	Search folders are extremely useful for organizing and finding messages. Unlike a simple search, a search folder remains until you delete it, and it works automatically. Search folders also present information in a consistent and familiar way.
Integration with SharePoint	You can easily copy contacts and other information between Outlook and Windows SharePoint Service sites. In addition, Outlook provides an interface through which you can configure Office-compatible alerts, such as those that can be generated by WSS sites.
Broad protocol support	Outlook 2003 supports SMTP, POP3, IMAP, and Exchange Server for e-mail, making it a good client platform for almost any mail server.

Weaknesses

Server requirements	Some Outlook features, such as public folders and a handful of message features, require an Exchange Server. A small number of new features in Outlook 2003, such as RPC over HTTP, require Exchange Server 2003.
BCM first release	Business Contact Manager for Outlook 2003 is an initial release, and while it is certainly useful, it is targeted primarily at individuals and small business and lacks some features, such as better database management, that will be added in future releases.
Some relearning	The interface changes and Outlook's rather confusing organization of options and settings could bewilder some casual Outlook users until they get up to speed with the new interface. However, common features and tasks remain largely unchanged from a user's perspective.
Lack of native NNTP support	Outlook does not, and probably never will, provide native support for NNTP (newsgroups). You still have to use Outlook Express or another news reader to read and post in newsgroups.

Who benefits from an upgrade?

- **Existing Outlook users.** Outlook 2003 offers enough new features and improvements to existing features that it's well worth an upgrade if you are already using a previous version of Outlook.
- **Users looking for a good PIM.** Outlook does a great job of integrating contacts, e-mail, tasks, and other data. Although it has been previously maligned for its susceptibility to e-mail exploits and viruses, Outlook 2003 provides a good set of security features to mitigate those risks.
- **Companies using Exchange Server.** Outlook is without question the best client for Exchange Server, fully supporting public folders and all of the other features offered by Exchange Server. An alternative for remote access where RPC over HTTP isn't feasible is Outlook Web Access, which in Exchange Server 2003 provides an interface with almost all of the features in Outlook 2003, including attachment blocking.
- **Sales professionals.** Business Contact Manager for Outlook 2003 provides a nice set of tools for managing sales contacts, products, and sales leads.

Links to additional resources

Microsoft Outlook Web Site: <http://office.microsoft.com/outlook>

Microsoft Office Web Site: <http://office.microsoft.com>

Microsoft Office 2003 Resource Kit: <http://www.microsoft.com/office/ork/2003/default.htm>

Outlook 2003 Inside Out, Microsoft Press: <http://www.microsoft.com/mspress/books/5601.asp>

Outlook Tips: <http://www.boyce.us/office>

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