



**Microsoft®**

Microsoft® Outlook™ 97

# White Paper

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## **Microsoft Outlook 97: Interoperability with Microsoft Exchange Client, Microsoft Mail Version 3.x, Microsoft Schedule+ 95, and Microsoft Schedule+ Version 1.0**

If your organization is planning or considering an upgrade to Microsoft® Outlook™ 97, you probably have some questions about how to ensure a seamless transition. You need to know how things will work differently on the client side and how the Outlook desktop information manager will interoperate with other workgroup clients in your organization. And you want to be sure you know what's involved from the administration standpoint to keep things running smoothly during and after the migration.

This paper gives you the answers in one place to help you evaluate and manage your organization's move to Outlook. It focuses on interoperability across Microsoft e-mail and group scheduling applications, and on coexistence issues that can affect users, administrators, and application and forms developers. You will find out:

- **What migrating to Outlook means for users**—What works differently from their previous Microsoft messaging and group scheduling clients and how they can exchange information with users who remain on those clients.
- **What system administrators need to know as they migrate users to Outlook**—How to ensure a smooth migration, and how to support a mixed environment that includes combinations of Outlook, Microsoft Exchange Client, Microsoft Mail 3.x for Windows®, Microsoft Schedule+ 95, and Microsoft Schedule+ 1.0.

- **What application and forms designers should know about building solutions for Outlook**—How to create forms that work in mixed environments, and how Outlook's enhanced application design environment, OLE Automation support, and printing tools in Outlook can help them build quality solutions for Outlook.

Although Outlook is compatible with all e-mail systems that support the Messaging Application Programming Interface (MAPI), this paper focuses on the interoperability between Outlook and Microsoft's other messaging and calendar products. It does not provide comprehensive information about using, administering, or programming for Outlook; for complete, detailed information about these topics, see the Outlook documentation and the Microsoft Office Resource Kit. The Office Resource Kit includes *Upgrading to Microsoft Outlook*, which provides detailed instructions for upgrading to Outlook and importing data from your previous messaging and calendar products.

In addition to the Outlook product documentation and the Office Resource Kit, the following documents can help you plan and manage a smooth upgrade to Outlook:

- *Outlook Product Enhancements Guide*
- *Outlook Features and Configuration Guide*
- *Outlook, the Internet and Intranets*
- *Building Outlook Information Sharing Solutions*

Outlook, like Microsoft Exchange Client, can use either Microsoft Exchange Server or Microsoft Mail 3.x as its messaging transport. However, Outlook runs on the Microsoft Windows 95 and Windows NT® platforms only. For this reason, organizations with broad cross-platform client requirements must continue to rely on Microsoft Exchange client and Schedule+ for their Windows 3.11, Apple Macintosh, and MS-DOS® users. However, a high level of interoperability enables users of different Microsoft groupware clients on different platforms to send and receive mail, as well as perform group scheduling duties.

In this type of mixed-client environment, users who continue to use previous Microsoft messaging and group scheduling clients cannot take full advantage of Outlook's enhanced user interface and capabilities. These interoperability differences are similar to the differences users notice when they upgrade other applications (such as upgrading from Microsoft Word version 6.0 to Word 95). For example, because non-Outlook users cannot take advantage of many Outlook feature enhancements, they may not be able to access or view an Outlook user's messages or other Outlook information the same way that another Outlook user can. In this paper, you'll find out what these interoperability differences are and how you can develop an effective strategy for migrating to or coexisting with Outlook.

## How to Use This White Paper

This white paper consists of four main parts:

- **Messaging and Groupware** — Describes how Outlook interoperates with Microsoft Exchange Client and Microsoft Mail 3.x for Windows. It gives users, administrators, and forms designers the information they need to ensure a smooth transition from these messaging clients to Outlook.
- **Calendaring and Scheduling** — Describes how Outlook interoperates with Microsoft Schedule+ 95 and Microsoft Schedule+ 1.0. It gives users, administrators, and application designers the information they need to ensure a smooth transition from these group scheduling clients to Outlook.

- **Appendix A: Interoperability Summaries by Client** — Contains tables that provide an overview of Outlook’s interoperability with each client discussed in this paper: Microsoft Exchange Client, Microsoft Mail 3.x, Microsoft Schedule+ 95, and Microsoft Schedule+ 1.0.
- **Appendix B: Terms Used in This White Paper** — Provides definitions for the key messaging and group scheduling terms discussed in this paper. If you are unsure of the exact meaning of a term that appears in this paper, check its definition in this appendix.

The “Messaging and Groupware” and “Calendaring and Scheduling” parts of this white paper each conclude with an interoperability table that summarizes how the clients interoperate in Microsoft Exchange Server, Microsoft Mail, or mixed server environments. It is a good idea to review these interoperability tables because they may indicate additional server-specific functionality differences that are not discussed in detail within the text.

This paper can also help you hone your strategy for planning and managing your organization’s migration to Outlook. You can also use this information to help your users prepare for and take advantage of Outlook’s advanced user interface and features.

## Messaging and Groupware

Outlook gives Microsoft Exchange Client users and Microsoft Mail 3.x for Windows users all the features they currently enjoy, in addition to many new information management capabilities. For example, new features Microsoft Exchange Client and Microsoft Mail 3.x users get when they upgrade to Outlook include:

- Integrated calendar functions, along with contact, journal, and task features
- Rich, multiple views of messages
- Custom view capabilities
- Advanced printing options

Except for its new features and enhanced user interface, users can think of Outlook as a straightforward upgrade for Microsoft Exchange Client or Microsoft Mail 3.x for Windows. Users can do everything they did with Microsoft Exchange Client or Microsoft Mail 3.x for Windows, plus more.

In an environment in which Outlook users must share information with Microsoft Exchange Client users and/or Microsoft Mail 3.x for Windows users, all users can exchange e-mail with each other. However, because many Outlook capabilities go beyond those of Microsoft Exchange Client and Microsoft Mail 3.x for Windows, Outlook users should be aware that their coworkers who are still using these other clients may not be able to view or use portions of the Outlook users’ messaging information the same way other Outlook users can.

This section provides important administration and upgrade notes, and describes Outlook, Microsoft Exchange Client, and Microsoft Mail 3.x for Windows interoperability issues in more detail.

## Managing a Mixed Messaging and Groupware Environment

Microsoft Outlook has ease of use and interoperability with other Microsoft groupware products and back-ends that take the administration hassle out of upgrading completely or managing mixed clients. For example, Outlook uses

Microsoft Exchange Server user accounts, so administrators do not need to create or import user accounts from Microsoft Exchange Server to Outlook. In fact, for the purposes of setup and administration, administrators can think of Outlook and the Microsoft Exchange Client as the same—any user who already has an account on Microsoft Exchange automatically has an account for Outlook.

Both Outlook and Microsoft Exchange Client use MAPI profiles, providers, and personal message stores, so you do not need to recreate MAPI profiles or import messages when your users upgrade from Microsoft Exchange Client to Outlook. In fact, Outlook requires no special setup or administration at all—you can simply replace Microsoft Exchange Client with Outlook. Outlook even uses the same enterprise address book as Microsoft Exchange Client.

Although Outlook works with Microsoft Mail postoffices, the full set of Outlook features is available only when using Outlook with Microsoft Exchange Server. The following Outlook features require Microsoft Exchange Server and are not available when running Outlook on Microsoft Mail 3.x postoffices:

- Opening another user's e-mail folders as a delegate
- Security on "Sent on behalf of" messages
- Deferred delivery and message expiration
- Digital signatures and encryption
- Public folders
- Full-text search

In addition, Microsoft Mail 3.x and Outlook cannot share the same message store. To use data from a Microsoft Mail 3.x message store with Outlook, you must import the message store to an Outlook-compatible (MAPI) format. Microsoft Exchange Server includes a utility that imports Microsoft Mail message stores to MAPI format.

## Upgrading and Importing Messaging Data to Outlook

Outlook makes it as easy and seamless as possible to upgrade from Microsoft Exchange Client and Microsoft Mail 3.x. For example, Outlook uses the same configuration information as Microsoft Exchange Client, and it can use all Microsoft Exchange Client custom forms and public folders, as well as virtually all Microsoft Exchange Client extensions. Outlook can also use a Microsoft Mail 3.x user's existing msmail.ini file and other Microsoft Mail 3.x for Windows configuration information, as well as existing Microsoft Mail 3.x extensions.

This tight integration makes it easy to upgrade to Outlook from Microsoft Exchange Client or the Microsoft Mail 3.x client. Users simply install Outlook and run a separate utility to import their Microsoft Exchange Client and Microsoft Mail 3.x message stores to Outlook automatically. Although Outlook does not remove Microsoft Exchange Client or Microsoft Mail 3.x from users' computers automatically, Outlook Setup gives users the option to remove these applications, as well as any unnecessary Microsoft Exchange Client or Microsoft Mail 3.x files. For detailed upgrading instructions, see the Outlook product documentation.

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**Note** Office Setup includes the Microsoft Mail information service that enables Outlook to use a Microsoft Mail 3.x postoffice. This service is not installed by default, however, so users must choose to install it.

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## Basic E-mail and Groupware Capabilities

Many organizations planning to migrate to Outlook want to ensure their users can perform basic e-mail and workgroup duties without interruption. The following section describes how Outlook, Microsoft Exchange Client, and Microsoft Mail 3.x for Windows interoperate when users exchange messages and use public folders.

### Exchanging Messages

Outlook users, Microsoft Exchange Client users, and Microsoft Mail 3.x for Windows users can exchange e-mail messages with each other freely.

However, Outlook users in a mixed environment should be aware that their coworkers who use Microsoft Exchange Client or Microsoft Mail 3.x cannot take full advantage of many Outlook features, including the following:

- **Enhanced standard message form** — Microsoft Exchange Client users who view messages created in Outlook see the messages in the Microsoft Exchange Client standard message form, which does not support the advanced features of the Outlook standard message form, such as message expiration. Similarly, Microsoft Mail 3.x users who view messages created in Outlook see the messages in the Microsoft Mail 3.x standard message form, which also does not support the advanced features of the Outlook standard message form. As a result, some of the information in the Outlook message may not be viewable to Microsoft Exchange Client or Microsoft Mail 3.x users.
- **Extended message properties** — When a Microsoft Exchange Client or Microsoft Mail 3.x user opens an Outlook message, extended Outlook message properties — such as voting buttons — that are not recognized by Microsoft Exchange Client or Microsoft Mail 3.x are ignored. This means that some messages created in Outlook may appear different to Microsoft Exchange Client and Microsoft Mail 3.x users. Outlook recognizes all Microsoft Exchange Client and Microsoft Mail 3.x message properties, however. The following table describes how Outlook message properties interoperate with Microsoft Exchange Client and Microsoft Mail 3.x.

This Outlook message property	Interoperates with Microsoft Exchange Client and the Microsoft Mail 3.x client this way
Voting buttons	<ul style="list-style-type: none"> <li>Microsoft Exchange Client and Microsoft Mail 3.x users do not receive voting buttons in any voting messages they receive from Outlook users.</li> </ul>
Have reply sent to	<ul style="list-style-type: none"> <li>When a Microsoft Exchange Client or a Microsoft Mail 3.x user replies to an Outlook message that has this property set, the reply goes to the correct recipient automatically.</li> <li>Although Microsoft Exchange Client or Microsoft Mail 3.x users cannot view this property in the Outlook messages they receive, they can view the intended recipients' names in the To lines of their replies.</li> </ul>
Do not deliver before	<ul style="list-style-type: none"> <li>Microsoft Exchange Client and Microsoft Mail 3.x users cannot view this property setting on Outlook messages they receive.</li> <li>Microsoft Exchange Client users can send mail with this property set, but the property is not as accessible as it is in the Outlook user interface.</li> </ul>
Message Flag properties (such as Due Date)	<ul style="list-style-type: none"> <li>Microsoft Exchange Client and Microsoft Mail 3.x users do not receive any Message Flag properties in messages they receive from Outlook users.</li> </ul>
Expires	<ul style="list-style-type: none"> <li>Microsoft Exchange Client and Microsoft Mail 3.x users do not receive message expiration properties in messages they receive from Outlook users.</li> <li>Microsoft Exchange Client users can send mail with this property set, but the property is not as accessible as it is in the Outlook user interface.</li> </ul>
Read receipt	<ul style="list-style-type: none"> <li>When Outlook users send messages with the Read Receipt property to Microsoft Exchange Client or Microsoft Mail 3.x recipients, the Outlook users receive the Read receipt notifications. This is the same result as when Outlook users send messages with the Read Receipt property to other Outlook users.</li> </ul>
Delivery receipt	<ul style="list-style-type: none"> <li>When Outlook users send messages with the Delivery Receipt property to Microsoft Exchange Client or Microsoft Mail 3.x recipients, the Outlook users receive the Delivery receipt notifications. This is the same result as when Outlook users send messages with the Delivery Receipt property to other Outlook users.</li> </ul>

- **Private items** —When an Outlook user marks an item (such as an e-mail or calendar item) as Private, other Outlook users cannot view the item. However, users running Microsoft Exchange Client can view the item if they have been granted folder access privileges for the folder in which that item is stored. Because Outlook folder-level privacy is absolute, the Outlook workaround for this functionality difference is to have Outlook users put items that they want to keep private in a separate folder that they don't share or on which they have set restrictions.
- **Non-table views** — Microsoft Exchange Client users can display Outlook "table" views—views that consist only of rows and columns—if the **Convert To**

**Exchange Views** check box is selected in **Folder Properties** for the Outlook folder. However, Microsoft Exchange Client cannot display Outlook non-table views, such as the day, week, and month views in the calendar, as well as the card, icon, and timeline views. When Outlook users and Microsoft Exchange Client users access the same set of public folders, Microsoft Exchange Client users cannot display any non-table views created by Outlook users.

- **Saved views** — Outlook and Microsoft Exchange Client use different formats to create saved views. Outlook recognizes both formats, so Outlook users can use any Microsoft Exchange Client view, as well as Outlook views. In contrast, Microsoft Exchange Client does not recognize the Outlook format, so Microsoft Exchange Client cannot use Outlook views by default. However, Outlook users can choose to maintain two copies of all saved table views in a folder automatically—one copy in Outlook format and one copy in Microsoft Exchange Client format.

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workaround enables Microsoft Exchange Client users to use Outlook forms, although any Outlook-specific view features, such as formula fields, are not included in the Microsoft Exchange Client copy. Also, when a Microsoft Exchange Client user opens a folder, Microsoft Exchange Client displays only the views that have been saved in Microsoft Exchange Client format.

- **Custom field types** —All Outlook custom field types, such as formula and combination fields, are not viewable at all by Microsoft Exchange Client or Microsoft Mail 3.x users.
- **Rich text in message bodies** —Like Microsoft Exchange Client users, Outlook users can format message text using rich text attributes such as bold, italic, and indent. Microsoft Mail 3.x, however, does not support rich text in messages. As a result, when an Outlook message with rich text is opened by a Microsoft Mail 3.x user, all rich text attributes are removed from the file and replaced by plain text.
- **Attachments**—Outlook and Microsoft Exchange Client users can open attachments or objects within messages created by Microsoft Mail 3.x users, and vice versa. Outlook and Microsoft Exchange Client users can also attach a message to another message. However, when Microsoft Mail 3.x users receive a message that has another message attached to it, they can view the original message, but they cannot view the attached message.

Outlook

users can also attach other Outlook items (such as a contact) to their messages. Recipients using Outlook can open these attachments and view the items in their appropriate Outlook forms. However, Microsoft Exchange Client or Microsoft Mail 3.x users receive the items as attachments containing text only.

- **Embedded hyperlinks** —If an Outlook or Microsoft Exchange Client message recipient clicks an embedded World Wide Web-style hyperlink (a URL address of an Internet or intranet Web site) in a message created by another Outlook or Microsoft Exchange Client user, the recipient jumps to the appropriate Web site. If a Microsoft Mail 3.x user opens a message with an embedded hyperlink, the hyperlink is displayed in the message as plain text only.
- **Unlimited message size** —Outlook and Microsoft Exchange Server can create and read a message of any size (subject to available system resources), while Microsoft Mail 3.x has additional size restrictions for messages. Although Microsoft Mail 3.x users may not be able to open a very large message created by an Outlook or Microsoft Exchange Client user, they can save the message to a file or print it.

## Using Public Folders

Outlook supports all the custom public folder view features of Microsoft Exchange Server. In fact, Microsoft Exchange Server does not distinguish between Outlook and Microsoft Exchange Client when users open a public folder. For this reason, Outlook and Microsoft Exchange Client users can have access to a common set of public folders. Microsoft Mail 3.x users, on the other hand, cannot access Outlook public folders, just as they cannot access Microsoft Exchange Client public folders.

When setting up public folders that Outlook users and Microsoft Exchange Client users will access, administrators should be familiar with the interoperability differences regarding non-table views and saved views, described in the “Exchanging Messages” section.

The following table summarizes public folder interoperability between Outlook, Microsoft Exchange Client, and Microsoft Mail 3.x for Windows.



Looks at a public folder containing views created by Microsoft Exchange Client		Looks at a public folder containing views created by Outlook	Looks at a public folder containing views created by Microsoft Exchange Client and Outlook
When this user			
Microsoft Exchange Client	<ul style="list-style-type: none"><li>Complete interoperability.</li></ul>	<ul style="list-style-type: none"><li>If the folder has the <b>Save Views in Exchange 4.0 Format</b> property set, all Outlook table views appear as Microsoft Exchange Client views with the same name (without formula columns).</li><li>Outlook non-table views (such as Calendar and Card views) do not appear in Microsoft Exchange Client.</li></ul>	<ul style="list-style-type: none"><li>Microsoft Exchange Client views appear intermixed with Outlook views.</li><li>If the folder has the <b>Save Views in Exchange 4.0 Format</b> property set, all Outlook table views appear as Microsoft Exchange Client views with the same name (without formula columns).</li><li>Outlook non-table views (such as Calendar and Card views) do not appear in Microsoft Exchange Client.</li></ul>
Outlook	<ul style="list-style-type: none"><li>Outlook automatically converts the view into Outlook format, leaving the Microsoft Exchange Client view intact.</li><li>Any changes made by the Outlook user are also shadowed in Microsoft Exchange Client format.</li></ul>	<ul style="list-style-type: none"><li>Complete interoperability.</li></ul>	<ul style="list-style-type: none"><li>Microsoft Exchange Client views appear intermixed with Outlook views.</li><li>Any changes made to Microsoft Exchange Client views are saved in both Microsoft Exchange Client and Outlook formats.</li><li>Changes made to Outlook views are saved in Microsoft Exchange Client format if the <b>Save Views in Exchange 4.0 Format</b> property is set.</li></ul>
Microsoft Mail 3.x <i>Note: Microsoft Mail 3.x does not include the public folders feature.</i>	<ul style="list-style-type: none"><li>Microsoft Mail 3.x cannot access public folders created in Microsoft Exchange Client.</li></ul>	<ul style="list-style-type: none"><li>Microsoft Mail 3.x cannot access public folders created in Outlook.</li></ul>	<ul style="list-style-type: none"><li>Microsoft Mail 3.x cannot access public folders created in Outlook or Microsoft Exchange Client.</li></ul>

## Other Messaging and Groupware Features

This section describes Outlook, Microsoft Exchange Client, and Microsoft Mail 3.x interoperability differences in features that go beyond the basic capabilities of exchanging e-mail messages and using public folders.

### Rules

**Note** The Outlook Rules Wizard will be available on the Microsoft Web site at <http://www.microsoft.com/msoffice> around the time that Microsoft Outlook 97 ships. Outlook users will be able to download it free from this site (connect fees may apply).

The Outlook Rules Wizard enables users to manage and modify their Outlook rules. From **Rules Organizer** in the Outlook Rules Wizard, users can view their Microsoft Exchange Client Inbox Assistant rules along with their Outlook rules. However, if an Inbox Assistant rule has not been converted to an Outlook rule, users cannot modify it in the Outlook Rules Wizard. They can modify rules created in the Inbox Assistant by enabling the Inbox Assistant extension in **Options** on the Outlook **Tools** menu. Although this enables users to modify their Inbox Assistant rules within Outlook, it does not convert the Inbox Assistant rules into Outlook rules.

Outlook also enables users to recreate (convert) Inbox Assistant rules into Outlook rules easily from within the Rules Wizard. Each time the Outlook Rules Wizard is started, it checks for active Inbox Assistant rules on the user's computer. If any exist, the Rules Wizard gives the user the option to convert them to Outlook rules automatically. After an Inbox Assistant rule has been converted to an Outlook rule, users can modify it anytime by using the Outlook Rules Wizard.

Although the Outlook Rules Wizard enables users to create, view, and modify Outlook rules easily, users do not need to download the Rules Wizard to use rules in Outlook.

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**Note** In addition to being compatible with Inbox Assistant, Outlook is also compatible with the Microsoft Exchange Client Out of Office Assistant.

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## Forms

Although Outlook users can use forms created with Microsoft Exchange Forms Designer (EFD), Microsoft Exchange Client users cannot view or use forms created with Outlook Forms, including public folder forms. Microsoft Mail 3.x users cannot view or use public folder forms or personal forms created with either Outlook Forms or EFD.

As a result, if your organization needs forms that are usable by both Outlook and Microsoft Exchange Client, you should develop them using EFD. For the same reasons, you should continue using EFD for forms during your organization's migration to Outlook until the majority of users (or all the necessary workgroups) have been migrated. For more details about developing or modifying forms for Outlook, see the "Outlook Forms Design Environment" section of this paper, the Office Resource Kit, or the *Building Outlook Information Sharing Solutions* white paper.

## WordMail

Microsoft Exchange Client users can choose either Microsoft Word 95 or Microsoft Word 97 for WordMail. Outlook users, however, must have Microsoft Word 97 installed to create messages using WordMail, although they can receive and read messages composed with either WordMail 95 or WordMail 97.

## Voting

With Outlook, users can easily create and send "ballot" messages to other Outlook users and track the voting responses in Outlook automatically. An Outlook user specifies the voting choices when creating the message, then sends the message to other users. When recipients using Outlook receive a voting message, the selections they can vote on appear as buttons in the Outlook message—a recipient votes with just a mouse click. The responses are logged in the original sender's e-mail message [usually stored in the Sent Mail folder], where the original sender can check to determine the results of the votes.

When Microsoft Exchange Client and Microsoft Mail 3.x users receive voting messages from Outlook users, they receive the text of the Subject line and body of the voting message. No voting buttons are displayed.

## Macintosh and MS-DOS Versions of Microsoft Exchange Client and Microsoft Mail 3.x

Just as the Microsoft Exchange Client for Windows opens standard Outlook forms by using its own standard message form, the Macintosh and MS-DOS versions of the Microsoft Exchange Client also use their own standard message forms to open standard Outlook forms. As a result, MS-DOS or Macintosh users of Microsoft Exchange Client or Microsoft Mail 3.x may not be able to view all the information contained in the standard Outlook form.

## Microsoft Exchange Client Preview Pane

Outlook provides some of the functionality — through different features and user interface approaches — offered by the Microsoft Exchange Client Preview Pane, an add-on feature that is included on the Microsoft Exchange Server Technical Resource CD. For example, Outlook enables users to preview the text of messages in their Inbox, without having to click each message. It also enables a user to view the size of messages and put reminders on any messages in his or her Inbox.

The following table illustrates how Outlook offers the functionality provided by the Microsoft Exchange Client Preview Pane.

This Microsoft Exchange Client Preview Pane feature		Is provided by Outlook this way
Preview pane itself	The Outlook AutoPreview feature enables users to view the first 3 lines or 256 characters of any message, from within the view.  Users can turn AutoPreview on or off for all messages or unread messages. They can also turn it on or off completely.	
Scheduled off-line synchronization	Outlook enables users to choose an option that synchronizes their folders automatically each time they log off of Outlook. To choose this option, from the <b>Tools</b> menu, Outlook users click <b>Options</b> , then click <b>General</b> .	
Message reminders	Using the Outlook Message Flag feature, an Outlook user can put reminders on any messages in the Inbox.	
Fixed font	Current plans for Outlook 97 do not include a fixed-font feature.	
Folder size	Current plans for Outlook 97 do not include a folder size feature.	

The Microsoft Exchange Client Preview Pane is not compatible with Outlook, and is therefore not recommended for use with Outlook.

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**Note** Microsoft Outlook is also compatible with the Internet Mail and News (IMN) feature included in Microsoft Internet Explorer version 3.0. Outlook and IMN users can exchange e-mail, and Outlook users can send task information and meeting requests to IMN users, who receive the items as text-only messages. In addition, an IMN user can upgrade to Outlook by running a utility that converts the IMN user's message store and address book to Outlook. For more information about the Internet Mail and News feature or the utility for upgrading IMN to Outlook, see the IMN information on the Web site for Internet Explorer at <http://www.microsoft.com/ie>.

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## Other Differences for Outlook Users

Outlook users may also notice these additional minor differences when they move to Outlook from Microsoft Exchange Client or Microsoft Mail 3.x for Windows:

- Outlook includes commands for creating or deleting a public folder favorite on its **File** menu, but does not include toolbar buttons for them.
- Microsoft Exchange Client users can use **Find** and **Replace** commands with Microsoft Exchange standard message forms. Outlook supports the **Find** command in the Outlook standard message form, and, when using WordMail 97, Outlook users can also take advantage of the **Replace** command in messages.
- Outlook stores one AutoSignature entry, while Microsoft Exchange Client can store multiple entries. Outlook users can use Message Templates to create different signatures for different sets of recipients.
- Read receipts are not generated when an Outlook user looks at a message using the Outlook AutoPreview feature and then deletes the message without first opening it.

## Outlook Forms Design Environment

Upgrading to Outlook also includes changes for users and developers who plan to take advantage of the advanced features in Outlook, such as its object model and its forms design capabilities. Advanced users and developers—as well as administrators—should read this section so they are aware of differences between Outlook and other Microsoft workgroup products.

Designers building or modifying forms for use in Outlook or mixed client environments should be familiar with the information in the following sections.

### Creating Forms All Your Clients Can Use

In a mixed-client environment, designers must consider which clients will be using the forms they create. For example, the Microsoft Exchange Client (both the Win16 and Win32® versions) can run only Microsoft Exchange Forms Designer (EFD) forms. The Outlook client (Win32 only), on the other hand, can run both forms developed with EFD and forms developed with Outlook Forms. Therefore, in a mixed client environment, any forms that will be used by both Win16 and Win32 messaging users should be developed using EFD.

This client	Can use forms developed with this environment
Outlook	EFD, Outlook Forms
Microsoft Exchange Client (both Win16 and Win32 versions)	EFD

At this time, neither forms created with EFD nor forms created with Outlook Forms are supported on the Macintosh and MS-DOS platforms. In addition, Microsoft Mail 3.x for Windows users cannot use forms created with either EFD or Outlook Forms.

## **Taking Advantage of the Enhanced Design Environment in Outlook**

Like EFD, the Outlook forms design environment, Outlook Forms, offers a no-programming layout environment for building and deploying custom Microsoft Exchange forms. Outlook Forms also includes many enhancements to make it even easier to create world-class forms.

For example, forms created using Outlook Forms are fully 32-bit and interpreted — not compiled — so they're small and fast. In addition, Outlook Forms supports expressions and validation, and designers can switch back and forth instantly between design and runtime. Outlook Forms also supports ActiveX™ controls. However, forms created with Outlook Forms cannot be modified or enhanced with Visual Basic® (as EFD forms can), although designers can add custom behavior to Outlook forms easily by using Visual Basic Scripting Edition (VBScript).

Outlook Forms also differs from EFD in that it enables designers to take advantage of familiar Microsoft Office document templates, such as Microsoft Word or Microsoft Excel templates, to create Office 97 Document Forms.

## **Messaging and Groupware Interoperability Table**

The following table summarizes the interoperability of Outlook with Microsoft Exchange Client and Microsoft Mail 3.x. Client interoperability may be different depending on whether the clients are running on Microsoft Exchange Server, Microsoft Mail Server, or in a mixed environment. The table indicates any server differences as well, to give you a big-picture view of Outlook interoperability.

If you are unsure about what any messaging or groupware term in this table means in this case, see "Appendix B: Terms Used in This White Paper."

In this interoperability table, the term "mixed" in the server information indicates an environment in which both Microsoft Exchange Server and Microsoft Mail servers coexist.

This Outlook feature or capability	Works on these Microsoft workgroup servers	Works with these Microsoft workgroup clients
Sending and receiving e-mail messages	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>• All (any combination of clients). However, Microsoft Exchange Client and Microsoft Mail 3.x do not use the Outlook standard message form, so they display the Outlook message in the Microsoft Exchange Client standard message form or the Microsoft Mail 3.x standard message form, respectively.</li> <li>• Because the Microsoft Exchange Client and Microsoft Mail 3.x standard message forms do not support the advanced functionality of Outlook, they ignore its extended message properties, such as voting buttons and Reply By, when they display a message created by an Outlook user.</li> </ul>
Views (including saved views)	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>• Microsoft Exchange Client and the Microsoft Mail 3.x client cannot display any Outlook non-table views.</li> <li>• Microsoft Exchange Client and Outlook use different formats to create saved views. Outlook recognizes both formats, but Microsoft Exchange Client recognizes only its own format.</li> <li>• Outlook users can use saved views created by Microsoft Exchange Client.</li> <li>• Microsoft Exchange Client users cannot use saved views created by Outlook, unless the Outlook user has selected the <b>Save views in Exchange 4.0 format</b> property for the Outlook folder. If this property is selected, Microsoft Exchange Client users can view table views saved by Outlook users.</li> </ul>
Custom field types	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>• Microsoft Exchange Client and the Microsoft Mail 3.x client cannot use some Outlook custom field types, such as formula fields.</li> </ul>
Rich text in messages	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>• Outlook and Microsoft Exchange Client support rich text in messages.</li> <li>• The Microsoft Mail 3.x client does not support rich text, so it displays rich text in received messages as plain text.</li> </ul>
Message attachments and embedded objects	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>• Outlook, Microsoft Exchange Client, and Microsoft Mail 3.x users can send and receive messages with attachments.</li> <li>• Outlook and Microsoft Exchange Client users can also send and receive messages with embedded objects or other messages attached.</li> <li>• Microsoft Mail 3.x does not support embedded objects or attached messages, and displays them as plain text in messages.</li> <li>• As clients for a Microsoft Mail server, Outlook and Microsoft Exchange Client users can receive attachments and embedded objects.</li> </ul>

Embedded hyperlinks in messages	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>Outlook and Microsoft Exchange Client support messages with embedded hyperlink jumps.</li> <li>Microsoft Mail 3.x displays embedded hyperlinks as plain text.</li> </ul>
Public folders	a) Microsoft Exchange Server or mixed b) Microsoft Mail Server	a) Outlook and Microsoft Exchange Client can use a common set of public folders, although Microsoft Exchange Client cannot display any non-table views created by Outlook users.  Microsoft Mail 3.x users cannot access Outlook or Microsoft Exchange Client public folders.  b) None.
Rules	a) Microsoft Exchange Server or mixed b) Microsoft Mail Server	a) Outlook displays Inbox Assistant rules in its Rules Wizard. Users can use the Outlook Rules Wizard to re-create their Inbox Assistant rules for Outlook, or they can choose an Outlook option to modify them. Each time the Outlook Rules Wizard is started, it checks for active Inbox Assistant rules on the user's computer and gives the user the option to convert them to Outlook rules automatically.  b) Outlook (by means of the Rules Wizard), because Outlook rules can be stored on the client, as well as the server.
Forms	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>Outlook can use forms created in Microsoft Exchange Client with the EFD.</li> <li>Only Outlook users can use Office Forms.</li> <li>Microsoft Exchange Client and the Microsoft Mail 3.x client cannot view or use any personal or public folder forms created in Outlook with Outlook Forms.</li> </ul>
Message size	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>Outlook and Microsoft Exchange Client messages can be of any size (subject to system resources), whereas Microsoft Mail 3.x messages have additional size restrictions.</li> </ul>
WordMail	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>Microsoft Exchange Client can use either Microsoft Word 95 or Microsoft Word 97 for WordMail.</li> <li>Outlook users must use Microsoft Word 97 for WordMail.</li> </ul>

## Calendaring and Scheduling

Outlook gives Schedule+ 95 and Schedule+ 1.0 users all the key features they currently have, in addition to many new information management capabilities. For example, new features Schedule+ 95 and Schedule+ 1.0 users get when they upgrade to Outlook include:

- Integrated mail functions, along with journal and note features (in addition, the integrated contact feature in Outlook is new to Schedule+ 1.0 users)
- Additional views
- Advanced custom view capabilities
- Task delegation
- Advanced printing options

Except for its new features and enhanced user interface, users can think of Outlook as a straightforward upgrade for Microsoft Schedule+ 95 or Microsoft Schedule+ 1.0. They can continue working with their calendar information just as they did in their previous application—except previous Schedule+ 1.0 users can now also manage their contact information with Outlook Contacts.

In a mixed environment consisting of Outlook and Schedule+ 95 and/or Schedule+ 1.0 users, all users can exchange meeting request messages and share calendar free/busy status with each other. However, because many Outlook capabilities go beyond those of Schedule+ 95 and Schedule+ 1.0, Outlook users should be aware that their coworkers who are still using Schedule+ 95 or Schedule+ 1.0 may not be able to view or use some of the messaging or calendar information the same way another Outlook user can.

This section provides important administration and upgrade notes, and describes Outlook, Schedule+ 95, and Schedule+ 1.0 interoperability issues in more detail.

## Managing a Mixed Scheduling Environment

Although Outlook, Schedule+ 95, and Schedule+ 1.0 offer a high level of interoperability for basic calendar and group scheduling capabilities, the interoperability differences described in this paper can affect more advanced levels of accessing each other's calendars during the migration to Outlook.

For this reason, if a workgroup or organization transitioning to Outlook from Schedule+ 95 or Schedule+ 1.0 relies heavily on the ability to modify each other's schedules, you may want to consider taking additional steps to ensure a smooth transition. The following suggestions can help you enable users in your organization to modify each other's schedules seamlessly:

- **Migrate all members of the workgroup at the same time, instead of in phases.** This avoids the interoperability differences that could cause interruptions or confusion in the way the workgroup members share their calendar information with each other. In particular, if the workgroup (or Microsoft Mail postoffice) contains users who have assistants manage their schedules, you must migrate these users and their assistants at the same time.
- **Upgrade conference room and resource accounts to Outlook last, after migrating all users.** This will enable users to view free/busy details on these conference rooms and resources throughout the migration. If you move a conference room to Outlook before all users are upgraded to Outlook, Schedule+ users cannot view that conference room's free/busy details.
- **Make sure users do not delete their Schedule+ files before they run the Outlook Import/Export Wizard to import their Schedule+ data to Outlook.** It is important that the .cal or .scd files be saved until the Outlook import process is complete.
- **Choose the Outlook option for continuing to use Schedule+ 95 for group scheduling during the organization's transition to Outlook.** This will enable all users to open each others' Schedule+ 95 schedules until the transition is complete. When all users have been upgraded to Outlook, they can clear the option and begin using Outlook for group scheduling, as well as for e-mail.

Schedule+ 95 users are prompted with this option when they install Outlook. In addition, administrators can turn on or off the Outlook group scheduling features for groups of users simultaneously. Using Standard Windows 95 profiles and remote registry support, system administrators can set two registry keys, UseSchedulePlus and UseSchedulePlusPrevious, to turn on or off Outlook group scheduling features for large numbers of users. For groups of users,



administrators can also “lock in” the option to use Schedule+ for group scheduling. This ensures that users don’t individually move to Outlook for group scheduling until the administrator is ready for them to.

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**Note**

The option to use Schedule+ 95 for group scheduling is made at the computer level, not the user level. For example, if multiple users work from the same computer, the Outlook option to use Schedule+ for group scheduling applies to all users working from that computer. For this reason, users who share a computer must migrate to Outlook simultaneously.

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If you have Outlook users who have been using Schedule+ 95 for group scheduling, before switching them (or allowing them to switch) to using Outlook for scheduling, make sure they are aware that Outlook cannot export data back to Schedule+ 95. Once users import their Schedule+ 95 data to Outlook, they cannot convert it back into Schedule+ 95 format. In addition, future meetings they accept from within the Outlook Inbox will be added to their Outlook calendars, instead of to their Schedule+ calendars. These meeting requests cannot be re-read from within Schedule+ 95. Note that after a user imports Schedule+ data to Outlook, Outlook prompts the user to choose whether to continue using Schedule+ as the primary calendar, or to move to Outlook for calendar functionality.

## Upgrading and Importing Scheduling Data to Outlook

To begin using Outlook, Schedule+ 95 and Schedule+ 1.0 users simply install Outlook and use the Outlook Import Wizard to import their Schedule+ 95 schedule (.scd) or Schedule+ 1.0 calendar (.cal) files. A separate set of utilities provided with Microsoft Exchange Server imports Microsoft Mail and competitive message stores to MAPI format. For more detailed information about upgrading from Schedule+ 95 or Schedule+ 1.0 to Outlook, see the Outlook product documentation.

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**Note** Outlook uses specific Schedule+ 95 files to import the Schedule+ 1.0 .cal file. If the necessary Schedule+ 95 files are not installed on the same computer from which you are running Outlook, Outlook does not give you the option to import a Schedule+ 1.0 .cal file.

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Although Outlook does not automatically remove Schedule+ 95 from users’ computers, Outlook Setup gives users the option to remove Schedule+ 95 and remove any unnecessary Schedule+ 95 files. Leaving Schedule+ on Outlook users’ computers helps ensure a smooth migration, as you saw in “Managing a Mixed Scheduling Environment.”

## Basic Group Scheduling Capabilities

For most organizations, two scheduling functionality areas are considered essential and therefore cannot be interrupted or broken during a migration:

- Exchanging meeting requests
- Viewing free/busy status

Outlook, Schedule+ 95, and Schedule+ 1.0 interoperate completely in both of these key areas.

As you read this section, you should be familiar with the distinction between free/busy status and free/busy details:

- **Free/busy status** — The time blocks during which time the user is available for a meeting or busy. When users publish their free/busy status, other users can view the free/busy time blocks (but not necessarily their free/busy details) from within the Meeting Planner.
- **Free/busy details** — The descriptions (details) of the appointments or activities a user has scheduled. Users who have been given at least Read permission to another user's calendar can not only view (in the Meeting Planner) the time blocks representing when that user is free or busy, but they can also view the user's free/busy details.

## Exchanging Meeting Request Messages

Outlook, Schedule+ 95, and Schedule+ 1.0 users can freely exchange meeting messages across Windows and Macintosh platforms.

Although Outlook users and Schedule+ 1.0 users can freely exchange meeting requests and responses, Schedule+ 1.0 does not recognize the advanced features of Outlook (such as attachments, the meeting location field, and recurring meetings). As a result, when a Schedule+ 1.0 user receives a meeting message from an Outlook user, Schedule+ 1.0 ignores any Outlook-specific message features it does not recognize. For example, if an Outlook user sends a recurring meeting request to a Schedule+ 1.0 user, the Schedule+ 1.0 user receives only the first meeting request.

## Viewing Free/Busy Status

When users "publish" their free/busy status, other users can view the free/busy time blocks (but not necessarily their free/busy details) from within the Meeting Planner. With appropriate permission, Outlook, Schedule+ 95, and Schedule+ 1.0 users can view each other's free/busy status (time blocks).

In addition to designating free/busy status, Outlook users can designate "tentative" and "out of office" time blocks for specific appointments. When Outlook users view each other's calendars, they can identify which time blocks are free, busy, tentative, or "out of office." When Schedule+ 95 or Schedule+ 1.0 users view an Outlook user's calendar in their Planners, time blocks designated by the Outlook user as tentative appear as free times to the Schedule+ users. However, time blocks designated by the Outlook user as "out of office" appear as busy times to Schedule+ 95 or Schedule+ 1.0 users.

Outlook differs slightly from Schedule+ in how it handles unpublished free/busy status. When a Schedule+ user chooses not to publish his or her free/busy status, other Schedule+ users who have at least Read permission for that user's schedule can still view the user's free/busy status in their Meeting Planners. However, when an Outlook user chooses not to publish his or her free/busy status, other Outlook users — even those who have at least Read Only permission for that user's schedule — cannot view the user's free/busy status in their Meeting Planners. To view the user's unpublished free/busy status, Outlook users must view (open) the user's calendar, providing that they have appropriate permission.

By default, Outlook publishes three months of free/busy status for all users. Users can change the number of months or choose not to publish their free/busy status to others at all (by specifying 0 months). Users set the number of months of

free/busy status that is published by clicking **Options** from the **Tools** menu, then **Calendar**, and then clicking **Advanced**. Then, in **Publish X months of free/busy status**, users enter 0 (zero).

## Other Group Scheduling and Calendar Features

The following sections describe differences that exist in how Outlook, Schedule+ 95, and Schedule+ 1.0 interoperate.

### Opening other users' calendars

Schedule+ 95 users cannot open an Outlook user's calendar. As a result, Schedule+ 95 users cannot view free/busy details of an Outlook user's calendar. Outlook users, on the other hand, can open Schedule+ 95 users' calendars with appropriate permission, and can therefore view a Schedule+ 95 user's free/busy details.

The following table summarizes how Outlook, Schedule+ 95, and Schedule+ 1.0 interoperate when users open each other's calendars.

When a user running this client	Opens the calendar or views free/busy details of a user or resource that is running Outlook	Opens the calendar or views free/busy details of a user or resource that is running Schedule+ 95	Opens the calendar or views free/busy details of a user or resource that is running Schedule+ 1.0
Outlook	<ul style="list-style-type: none"> <li>Complete interoperability.</li> </ul>	<ul style="list-style-type: none"> <li>Complete interoperability.</li> </ul>	<ul style="list-style-type: none"> <li>Complete interoperability.</li> </ul>
Schedule+ 95	<ul style="list-style-type: none"> <li>No interoperability because Schedule+ 95 cannot read Outlook format.</li> </ul>	<ul style="list-style-type: none"> <li>Complete interoperability.</li> </ul>	<ul style="list-style-type: none"> <li>Complete interoperability.</li> </ul>
Schedule+ 1.0	<ul style="list-style-type: none"> <li>No interoperability.</li> </ul>	<ul style="list-style-type: none"> <li>No interoperability.</li> </ul>	<ul style="list-style-type: none"> <li>User can open the other user's calendar only.</li> </ul>

### Viewing another user's free/busy details (with read-only access)

An Outlook user can display the free or busy details of Schedule+ 95 and Schedule+ 1.0 users. However, Schedule+ 95 and Schedule+ 1.0 users cannot view Outlook users' free/busy details.

Outlook users who have been given at least Read permission to another user's calendar can not only see when that user is free or busy, but they can also view — from within the Meeting Planner — the description (details) of the appointments or activities that user has scheduled.

### Delegate access

Just as they can give others permission to read or modify their folders, users can designate other users to be their "delegates." As a delegate, a user can manage the owner's e-mail and schedule, as well as create, send, and reply to messages (including meeting and task requests) on the owner's behalf. For example, managers may give their assistants or teams access to their schedules so the

assistants or team members can create messages, appointments, tasks, or other items for them.

A delegate relationship requires both users to be running the same scheduling client. For example, Outlook users can be delegates for other Outlook users. However, a Schedule+ 95 user cannot be a delegate for an Outlook user, nor can an Outlook user be a delegate for a Schedule+ 95 user.

Outlook users who want to participate in delegate relationships with other Outlook users must keep all their primary folders (such as Calendar and Inbox) on the server, instead of on their local computers.

The following table summarizes how Outlook, Schedule+ 95, and Schedule+ 1.0 interoperate when users access each other's information.

When a user running this client	Accesses the calendar of a an Outlook user or resource	Accesses the calendar of a Schedule+ 95 user or resource	Accesses the calendar of a Schedule+ 1.0 user or resource
Outlook	<ul style="list-style-type: none"><li>• Complete interoperability.</li></ul>	<ul style="list-style-type: none"><li>• No interoperability.</li></ul>	<ul style="list-style-type: none"><li>• No interoperability.</li></ul>
Schedule+ 95	<ul style="list-style-type: none"><li>• No interoperability.</li></ul>	<ul style="list-style-type: none"><li>• Complete interoperability.</li></ul>	<ul style="list-style-type: none"><li>• No interoperability.</li></ul>
Schedule+ 1.0	<ul style="list-style-type: none"><li>• No interoperability.</li></ul>	<ul style="list-style-type: none"><li>• No interoperability.</li></ul>	<ul style="list-style-type: none"><li>• Complete interoperability.</li></ul>

Schedule+ 95 users can designate other users to be their "delegate owners." As a delegate owner, a user has all the capabilities of a delegate, plus he or she can designate additional delegates for the owner's schedule.

Like Schedule+ 95 users, Outlook folder owners can enable their delegates to give other users the necessary permission for accessing the owner's folders. However, Outlook does not enable a delegate to designate additional delegates for the owner's folders. To designate a delegate in Outlook, you must be logged on as the folder (account) owner.

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**Note** When Outlook is a client for a Microsoft Mail server, Outlook users cannot give other Outlook users access to their folders.

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### Direct booking

If they have appropriate permission, Outlook users can take advantage of the Schedule+ direct booking feature to book appointments into a Schedule+ 95 or Schedule+ 1.0 calendar directly. However, Schedule+ 95 and Schedule+ 1.0 users cannot book appointments into Outlook calendars directly. In addition, Outlook users cannot book appointments into other Outlook calendars directly.

Outlook helps users get into the habit of organizing meetings by sending meeting requests, instead of booking appointments directly into other users' calendars, as was necessary on some mainframe systems. However, with appropriate permission (such as Delegate), an Outlook user can open another Outlook user's or resource's calendar and modify it if necessary.

The following table describes how Outlook, Schedule+95, and Schedule+ 1.0 interoperate when users try to book meetings into each other's calendars directly.

When a user running this client	Directly books an appointment in the calendar of a resource running Outlook	Directly books an appointment in the calendar of a resource running Schedule+ 95	Directly books an appointment in the calendar of a resource running Schedule+ 1.0
Outlook	User can open resource's calendar and add an appointment. However, Outlook does not offer a specific "direct booking" feature.	<ul style="list-style-type: none"> <li>Complete interoperability.</li> </ul>	<ul style="list-style-type: none"> <li>Complete interoperability.</li> </ul>
Schedule+ 95	<ul style="list-style-type: none"> <li>No interoperability.</li> </ul>	<ul style="list-style-type: none"> <li>Complete interoperability.</li> </ul>	<ul style="list-style-type: none"> <li>No interoperability.</li> </ul>
Schedule+ 1.0	<ul style="list-style-type: none"> <li>No interoperability.</li> </ul>	<ul style="list-style-type: none"> <li>No interoperability.</li> </ul>	<ul style="list-style-type: none"> <li>Complete interoperability.</li> </ul>

With direct booking, no meeting request is actually sent to the Schedule+ resource. The meeting organizer's client software simply adds the meeting directly into the Schedule+ resource's calendar. Because a directly booked Schedule+ resource is unlikely to receive meeting requests, it is not required that you assign a delegate to the resource or have a continuously running computer logged into the resource's account to process incoming meeting requests. However, without a delegate or continuously running computer for the Schedule+ resource, if a user does send an explicit meeting request to the resource instead of booking an appointment directly, the meeting request will go unnoticed until a user actually logs on to the resource's account.

Unlike Schedule+ accounts, however, Outlook accounts cannot be booked directly. Therefore, to process the meeting requests that are sent to Outlook resource accounts, it is recommended that each Outlook resource account be set up with a delegate that receives its meeting requests. The delegate account should be logged in on a continuously running computer. Because a single delegate can be responsible for multiple resource accounts, a single, dedicated "delegate computer" can handle a large number of conference rooms and other resources.

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**Note** When Outlook is a client for a Microsoft Mail server, Outlook users cannot take advantage of the Outlook delegate access capabilities. For this reason, resource accounts on a Microsoft Mail server should be Schedule+ 95 accounts, so both Outlook users and Schedule+ users can book appointments into them directly.

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## Tasks

Outlook gives users new task features that are not available in Schedule+ 95 or Schedule+ 1.0:

- **Additional views** — Outlook provides additional views for task items, making it easier for users to manage tasks the way that best suits their needs.
- **Task delegation** — Outlook enables users to delegate tasks to other users. When an Outlook user delegates a task to another Outlook user, all the task's information (such as start date, end date, and status) is sent as a special *task request* message to the recipient, who can add it to his or her own Task List automatically. However, when an Outlook user delegates a task to a user who

is running Microsoft Exchange Client or Microsoft Mail 3.x, the recipient receives only an e-mail message that lists the task's description, start and end dates, and other information as text in the body of the message.

Users may import their Schedule+ 95 or Schedule+ 1.0 task data any time after Outlook is installed, using the Outlook Import Wizard. By default, Outlook imports Schedule+ task information into the Outlook Tasks folder. Users can choose to ignore or replace any duplicate entries encountered during the import process.

## Contacts

Outlook provides a rich Contacts feature that helps users keep their business and personal contact information up to date. Although Schedule+ 95 includes some contact features, many of the Outlook contact management enhancements are not available in Schedule+ 95:

- **Additional views** — Outlook provides additional contact views that are not available in Schedule+ 95.
- **Combined contacts and e-mail addresses** — The enhanced Contacts feature enables Outlook users to include e-mail addresses with their contacts. Outlook users can import all Schedule+ 95 contacts, as well as contacts stored in Microsoft Exchange Client personal address books (PABs). In addition, Outlook users can use their Contacts as their personal e-mail address books, so they no longer need to maintain individuals' names and e-mail addresses in two separate places.

Users should understand the following PAB and Contacts issues so they can manage their contacts and e-mail distribution lists effectively:

- Users can store e-mail distribution lists in their PABs, but they cannot store them (in the same way) in their Outlook Contacts. So users who maintain distribution lists can use their Contacts as their list of individual e-mail recipients and use their PABs for their collection of e-mail distribution lists.

However, users can easily use their Contacts to duplicate the effect of personal distribution lists by following these quick steps:

1. For each recipient to be included in this distribution, create an Outlook contact that includes the recipient's e-mail address.
2. Create a custom category to represent the set of users on your conceptual "distribution list," then add this category to the appropriate contacts in Outlook.
3. Using the View Selector in Contacts, select the By Category view. Then, without expanding the category name, click and drag the entire category into the Inbox icon on the Outlook Bar.

Outlook creates a new message and adds all the contacts in the selected category to the To line.

- To add e-mail addresses to their PABs, users click **Add to PAB** in appropriate dialog boxes. To add e-mail addresses to their Outlook Contacts, users select the e-mail address and then drag it to the Contacts icon on the Outlook Bar, or right-click the e-mail address and click the **Add to Outlook Address Book** item from the resulting drop-down list.
- While users can add a public folder to their PABs, they cannot add a public folder to their Contacts list.
- When the e-mail address for an Outlook contact has the **Always send mail in Exchange rich text format** option selected, this option is not recognized

when that e-mail address is selected later from the Outlook Address Book. To work around this difference, the Outlook user can type the e-mail address directly in the To line of the message and then choose the **Always send mail in Exchange rich text format** option from within the message. Or, the user can add the e-mail address to his or her PAB and set the option from within the PAB.

Users may import their Schedule+ contact data any time after Outlook is installed, using the **Import And Export** command on the Outlook **File** menu. By default, Outlook imports Schedule+ contact information into Outlook's Contacts folder. Users can choose to ignore or replace any duplicate entries encountered during the import process. The Outlook Import Wizard also imports Microsoft Exchange Client PABs.

## Calendar Synchronization

Although Schedule+ 95 and Schedule+ 1.0 synchronize calendars the same way, Outlook's calendar synchronization method is different. Schedule+ maintains two copies of a user's calendar — a local copy and a server copy. By default, Schedule+ runs primarily from a local calendar and automatically synchronizes the local and server calendars each time the user connects to the server.

With Outlook, users work directly on the server-based calendar by default, so there is less need for automatic background replication. In addition, a single calendar file, residing on the server, provides additional security and manageability. Disconnected users also benefit from the tight integration of Outlook with Microsoft Exchange Client: a single command and a single phone call synchronize all folders—calendar, e-mail, public folders, contacts, and tasks.

Although working directly on the server-based calendar is default Outlook behavior, users can choose to have both a server and a local copy of their Outlook folder. For example, users who travel frequently or need the ability to access their Outlook information from an off-line store may want to take advantage of this ability. In such cases, users can configure Outlook to synchronize the folders automatically when they log on and/or log off.

## Other Calendar Features

Outlook users will also notice the following differences when they move to Outlook from Microsoft Schedule+ 95:

- **Timex DataLink watches** — The Outlook user interface enhancements make it even easier for users to download their Outlook information into their Timex DataLink watches.
- **Covey Seven Habits** — Outlook does not include the Covey Seven Habits feature that is included in Schedule+ 95.
- **Enhanced printing capabilities** — Outlook provides advanced printing capabilities that give previous Schedule+ 95 and Schedule+ 1.0 users more flexibility in printing their schedules, and that enable them to print their schedules to fit a variety of paper formats. (Note that the Outlook enhanced OLE Automation interface does not support the Schedule+ 95 printing language.)
- **Private items** — When an Outlook user marks an item (such as an e-mail or calendar item) as Private, other Outlook users cannot view the item. However, users running Microsoft Exchange Client can view the item if they have been granted folder access privileges for the folder in which that item is stored. Because Outlook folder-level privacy is absolute, the Outlook workaround for this functionality difference is to have Outlook users put items that they want to

keep private in a separate folder that they don't share or on which they have set restrictions.

## **Web Services**

An add-on utility, Internet Assistant for Microsoft Schedule+ 95, makes it easy for Schedule+ 95 users to publish calendar or free/busy information on a Web site of their choice (either on the Internet or on an intranet). With this tool, Schedule+ 95 users can publish static information from personal calendars, team calendars, or event schedules on the Web, and view the information with a Web browser that duplicates the familiar Schedule+ 95 user interface.

In contrast, Outlook will be taking advantage of Microsoft Exchange Web Services (included in Microsoft Exchange Server version 4.5) to enable Outlook users to use any Web browser to access — and actively manage — their Outlook data. Outlook users will be able to work with their Outlook folders over the Internet (or an intranet) as HTML pages, without needing to have Outlook installed on the computers they are using. For example, traveling Outlook users may have access to the Internet or the corporate intranet, but may not have access to a computer that has Outlook installed. Using Microsoft Exchange Web Services, these users can access their Outlook data (including e-mail, calendar, and contact items), using only the installed Web browser. By taking advantage of Microsoft Exchange Web Services, Outlook will give users the benefit of Windows NT reliable intranet and Internet security, with a user interface that is familiar and convenient for Outlook users.

## **Integration with Microsoft Project**

Microsoft Project 95 takes advantage of Microsoft Schedule+ 95 and Microsoft Exchange Client to create an integrated environment in which project managers can assign tasks to other users automatically. Project managers running Microsoft Project 95, Schedule+ 95, and Microsoft Exchange Client can assign Schedule+ tasks — through e-mail messages — to other users. If the recipients accept the tasks and are running Schedule+ 95, the tasks are automatically added to their Schedule+ Task Lists. The project manager can also send users a message to request their project status. When Schedule+ 95 users reply to these status requests, Microsoft Project uses the information in their Schedule+ Task Lists to generate a status reply message automatically.

Microsoft Project 95 users will also be able to assign tasks to Outlook users. However, if the Outlook recipients accept the tasks, Microsoft Project 95 will not add the tasks to their Outlook Tasks automatically. Plans for future versions of Microsoft Project include the Schedule+ functionality described above, as well as additional Outlook integration functionality.

## **Macintosh**

Outlook offers identical interoperability with Schedule+ 95, whether the Schedule+ 95 user is using a Macintosh system or a Microsoft Windows system. As a result, Outlook users and Schedule+ 95 Macintosh users can exchange meeting messages and, with the appropriate permission, can view each other's free/busy status.

Macintosh Schedule+ 1.0 users and Outlook users can exchange meeting messages.

## **Other Differences for Outlook Users**

Outlook users may also notice these additional minor differences when they move to Outlook from Schedule+ 95 or Schedule+ 1.0:



- Outlook users must keep all their personal folders either on the server or on their local computers. They cannot work primarily from a local file for their calendars while maintaining their mailboxes on a server.
- The Outlook enhanced meeting organization interface in the Meeting Planner, including the Plan a Meeting feature, makes a Meeting Wizard unnecessary.
- Outlook streamlines task prioritization by offering three priority levels: High, Medium, or Low. However, when Outlook imports task data from Schedule+, it maintains the Schedule+ priority level information for each item. Users can view the Schedule+ priority level for that item in Outlook by adding the Schedule+ priority column to their Tasks view.

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Outlook users may assign any of these priorities to any of their tasks, they cannot assign them to projects or task categories.

- Outlook does not include a default Yearly view, although users achieve the same result easily by dragging to display several months of the Date Picker in the Calendar view.
- Outlook does not include a **Number of Days** command on its **View** menu, although users can display multiple days while they are working with their calendars.
- Outlook does not include Private and Reminder toolbar buttons, although these options are easy to set from within an item's dialog box.
- Outlook users are not prompted to include travel time for meetings.

## Using the Outlook Enhanced OLE Automation Interface

Schedule+ and Outlook provide different OLE Automation interfaces, or object models. Outlook includes a new object model that not only offers equivalent functionality to that of Schedule+, but it also offers even more capabilities. The Outlook automation library offers developers broader and more complete access to methods and properties of all Outlook items than the Schedule+ libraries provided. In addition, because the Microsoft Outlook library is well aligned with other Microsoft Office object models, developers benefit from its high level of consistency and standardization.

Schedule+ 95 applications must be revised to be compatible with the Outlook enhanced object model. In the Outlook online Help, Microsoft will provide detailed information about the Outlook object model. This information can help developers determine how they will need to update their Schedule+ 95 applications to work with Outlook.

## Calendaring and Scheduling Interoperability Table

The following table summarizes Outlook interoperability with Microsoft Exchange Client, Microsoft Mail 3.x, Microsoft Schedule+ 95, and Schedule+ 1.0. Client interoperability may be different depending on whether the clients are running on Microsoft Exchange Server, Microsoft Mail 3.x, or in a mixed environment. The table indicates any server differences as well, to give you a big-picture view of Outlook interoperability.

If you are unsure about what any calendaring or group scheduling term in this table means in this case, see "Appendix B: Terms Used in This White Paper."

In this interoperability table, the term "mixed" in the server information indicates an environment in which both Microsoft Exchange Server and Microsoft Mail servers coexist.



This Outlook feature or capability	Works on these Microsoft workgroup servers	Works with these Microsoft workgroup clients
Sending and receiving meeting requests or task requests	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>• All (any combination of clients) can exchange meeting requests freely. However, Schedule+ 1.0 users cannot take advantage of Outlook message features, such as recurring meetings.</li> <li>• When an Outlook user sends a task request (delegating a task) to Schedule+ 95 or Schedule+ 1.0 users, the Schedule+ users see the contents of the task request as body text only.</li> </ul>
Viewing another user's (published) free/busy status	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>• All (any combination of clients) can view each other's published free/busy status.</li> </ul>
Viewing another user's (shared but not published) free/busy status	a) Microsoft Exchange Server b) Microsoft Mail Server or mixed c) Microsoft Exchange Server, Microsoft Mail Server, or mixed	a) Outlook users can view other Outlook users' shared but not published free/busy status.  Outlook users can also view Schedule+ 95 users' free/busy status if the necessary Schedule+ 95 files are installed on the Outlook user's computer. In this case, Outlook actually opens Schedule+ 95 and uses the Schedule+ 95 Meeting Planner to display the Schedule+ 95 user's free/busy status.  Outlook users cannot view Schedule+ 1.0 users' shared but not published free/busy status.  b) None.  c) Users of Schedule+ 1.0 or Schedule+ 95 cannot see Outlook users' shared free/busy status.
Opening another user's calendar	a) Microsoft Exchange Server b) Microsoft Mail Server or mixed	a) Outlook users can open each other's calendars.  Outlook users can open a Schedule+ 95 user's calendar if Schedule+ 95 is installed on the Outlook user's computer. In this case, Outlook opens Schedule+ 95 and displays the other user's calendar in Schedule+ 95 instead of in Outlook.  Schedule+ 95 and Schedule+ 1.0 users cannot open Outlook users' calendars.  b) Outlook users can open each other's calendars, but they cannot open Schedule+ 95 users' calendars.  Schedule+ 95 and Schedule+ 1.0 users cannot open Outlook users' calendars.
Viewing another user's free/busy details	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>• Outlook users can view the free/busy details of Schedule+ 1.0, Schedule+ 95, or other Outlook users in the Meeting Planner (right mouse click).</li> <li>• Schedule+ 95 users and Schedule+ 1.0 users cannot view Outlook users' free/busy details.</li> </ul>

Delegate access (such as reading and writing into another user's calendar)	a) Microsoft Exchange Server b) Microsoft Mail Server c) Microsoft Exchange Server, Microsoft Mail Server, or mixed	a) Outlook users can be delegates for other Outlook users, but they cannot be delegates for Schedule+ 95 or Schedule+ 1.0 users. b) Outlook users can be delegates for other Outlook users when the Outlook option for using Schedule+ 95 for scheduling is selected. c) Schedule+ 95 and Schedule+ 1.0 users cannot be delegates for an Outlook user.
Directly booking a meeting into another user's calendar	a) Microsoft Exchange Server b) Microsoft Mail Server c) Microsoft Exchange Server, Microsoft Mail Server, or mixed	a) Outlook users can book meetings into Schedule+ 95 conference rooms or resources directly. b) Outlook users can book meetings directly into Schedule+ 1.0 or Schedule+ 95 conference rooms or resources. c) Users of Schedule+ 1.0 or Schedule+ 95 cannot write an appointment into an Outlook user's calendar. Outlook users cannot book into another Outlook user's calendar directly, but they can duplicate the functionality by opening the user's calendar.
Task delegation	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>• Outlook users can delegate tasks to users of Outlook, Schedule+ 95, or Schedule+ 1.0 by sending task request messages.</li> <li>• When Schedule+ 95 or Schedule+ 1.0 users receive a task request message, the task information is displayed as body text only.</li> </ul>
Contacts	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>• Outlook contacts can include e-mail addresses and can therefore be used to send messages.</li> <li>• Schedule+ 95 contacts can include e-mail address information, but they cannot be used to address messages.</li> <li>• Schedule+ 1.0 does not include a contacts feature.</li> </ul>
Import Schedule+ appointments, contacts, and tasks	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>• Outlook imports Schedule+ 1.0 or Schedule+ 95 data.</li> </ul>

## **Appendix A: Interoperability Summaries by Client**

The tables in this section give you an overview of Outlook interoperability with each Microsoft groupware client: Microsoft Exchange Client, Microsoft Mail 3.x client, Schedule+ 95, and Schedule+ 1.0. If you are unsure about the intended meaning of a messaging or scheduling term used in one of these tables, see “Appendix B: Terms Used in This White Paper.”

## Outlook Interoperability with Microsoft Exchange Client

The following table summarizes interoperability differences users should know about when they upgrade to Outlook from Microsoft Exchange Client.

This Outlook feature or capability	On these Microsoft workgroup servers	Interoperates this way between Outlook and Microsoft Exchange Client
Sending and receiving e-mail messages	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>Both clients can exchange messages freely. However, Microsoft Exchange Client does not use the Outlook standard message form, so it displays the Outlook message in the Microsoft Exchange Client standard message form.</li> <li>Because the Microsoft Exchange Client standard message form does not support the advanced functionality of Outlook, it ignores Outlook message properties, such as voting buttons and Reply By, when it displays a message created by an Outlook user.</li> </ul>
Views (including saved views)	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>Microsoft Exchange Client cannot display any Outlook non-table views.</li> <li>Microsoft Exchange Client and Outlook use different formats to create saved views. Outlook recognizes both formats, but Microsoft Exchange Client recognizes only its own format.</li> <li>Outlook users can use saved views created by Microsoft Exchange Client.</li> <li>Microsoft Exchange Client users cannot use saved views created by Outlook, unless the Outlook user has selected the <b>Save views in Exchange 4.0 format</b> property for the Outlook folder. If this property is selected, Microsoft Exchange Client users can view table views saved by Outlook users.</li> </ul>
Custom field types	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>Microsoft Exchange Client cannot use some Outlook custom field types, such as formula fields.</li> </ul>
Rich text in messages	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>Outlook and Microsoft Exchange Client support rich text in messages.</li> </ul>
Message attachments and embedded objects	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>Outlook and Microsoft Exchange Client users can send and receive messages with attachments and embedded objects.</li> <li>Outlook and Microsoft Exchange Client users can also send and receive messages that have other messages attached.</li> <li>As clients for a Microsoft Mail server, Outlook and Microsoft Exchange Client users can receive attachments and embedded objects.</li> </ul>
Embedded hyperlinks in messages	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>Outlook and Microsoft Exchange Client support messages with embedded hyperlink jumps.</li> </ul>
Public folders	a) Microsoft Exchange Server or mixed b) Microsoft Mail Server	a) Outlook and Microsoft Exchange Client can use a common set of public folders, although Microsoft Exchange Client cannot display any non-table views created by Outlook users.  b) Outlook and Microsoft Exchange Client public folders are not supported on Microsoft Mail Server.

Rules	<p>a) Microsoft Exchange Server or mixed</p> <p>b) Microsoft Mail Server</p>	<p>a) Outlook displays Inbox Assistant rules in its Rules Wizard. Users can use the Outlook Rules Wizard to re-create their Inbox Assistant rules for Outlook, or they can choose an Outlook option to modify them. Each time the Outlook Rules Wizard is started, it checks for active Inbox Assistant rules on the user's computer and gives the user the option to convert them to Outlook rules automatically.</p> <p>b) When Outlook is a client on Microsoft Mail Server, Outlook users can continue to use rules (by using the Rules Wizard) because Outlook rules can be stored on the client, as well as the server.</p>
Forms	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>• Outlook users can use forms created in Microsoft Exchange Client with the EFD.</li> <li>• Only Outlook users can use Office Forms.</li> <li>• Microsoft Exchange Client users cannot view or use any personal or public folder forms created in Outlook with Outlook Forms.</li> </ul>
Message size	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>• Outlook and Microsoft Exchange Client messages can be of any size (subject to system resources).</li> </ul>
WordMail	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>• Microsoft Exchange Client users can use either Microsoft Word 95 or Microsoft Word 97 for WordMail.</li> <li>• Outlook users must use Microsoft Word 97 for WordMail.</li> </ul>



## Outlook Interoperability with Microsoft Mail 3.x Client

The following table summarizes interoperability differences users should know about when they upgrade to Outlook from Microsoft Mail 3.x.

This Outlook feature or capability	On these Microsoft workgroup servers	Interoperates this way between Outlook and the Microsoft Mail 3.x for Windows client
Sending and receiving e-mail messages	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>Both clients can exchange messages freely. However, Microsoft Mail 3.x cannot display the Outlook standard message form, and it ignores Outlook message properties, such as voting buttons and Reply By.</li> </ul>
Views	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>Microsoft Mail 3.x client cannot display any Outlook non-table views.</li> </ul>
Custom field types	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>Microsoft Exchange Client and Microsoft Mail 3.x client cannot use some of Outlook's custom field types, such as formula fields.</li> </ul>
Rich text in messages	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>Outlook and Microsoft Exchange Client support rich text in messages.</li> <li>Microsoft Mail 3.x client does not support rich text, so it displays rich text in received messages as plain text.</li> </ul>
Message attachments and embedded objects	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>Outlook and Microsoft Mail 3.x users can send and receive messages with attachments.</li> <li>Outlook users can also send and receive messages with embedded objects or other messages attached.</li> <li>Microsoft Mail 3.x does not support embedded objects or attached messages, and displays them as plain text in messages.</li> </ul>
Embedded hyperlinks in messages	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>Outlook supports messages with embedded hyperlink jumps.</li> <li>Microsoft Mail 3.x displays embedded hyperlinks as plain text.</li> </ul>
Public folders	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>Microsoft Mail 3.x users cannot access Outlook public folders.</li> <li>Public folders are not supported on Microsoft Mail Server.</li> </ul>
Forms	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>Microsoft Mail 3.x client cannot view or use any personal or public folder forms created in Outlook with Outlook Forms.</li> </ul>
Message size	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>Outlook messages can be of any size (subject to system resources), whereas Microsoft Mail 3.x messages have additional size restrictions.</li> </ul>

## Outlook Interoperability with Microsoft Schedule+ 95

The following table summarizes interoperability differences users should know about when they upgrade to Outlook from Schedule+ 95.

This Outlook feature or capability	On these Microsoft workgroup servers	Interoperates this way between Outlook and Microsoft Schedule+ 95
Sending and receiving meeting requests or task requests	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>Both users can exchange meeting requests freely.</li> <li>When an Outlook user sends a task request (delegating a task) to a Schedule+ 95 user, the Schedule+ 95 user receives the contents of the task request as body text only.</li> </ul>
Viewing another user's (published) free/busy status	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>Outlook and Schedule+ 95 users can view each other's published free/busy status.</li> </ul>
Viewing another user's (shared but not published) free/busy status	a) Microsoft Exchange Server b) Microsoft Mail Server or mixed c) Microsoft Exchange Server, Microsoft Mail Server, or mixed	a) Outlook users can view shared but not published free/busy status of other Outlook users.  Outlook users can also view the shared but not published free/busy times of Schedule+ 95 users if the necessary Schedule+ 95 files are installed on the Outlook user's computer. In this case, Outlook actually opens Schedule+ 95 and uses the Schedule+ 95 Meeting Planner to display the Schedule+ user's free/busy status.  b) None.  c) Schedule+ 95 users cannot see Outlook users' shared but not published free/busy status.
Opening another user's calendar	a) Microsoft Exchange Server b) Microsoft Mail Server or mixed	a) Outlook users can open each other's calendars.  Outlook users can open a Schedule+ 95 user's calendar if Schedule+ 95 is installed on the Outlook user's computer. In this case, Outlook opens Schedule+ 95 and displays the other user's calendar in Schedule+ 95 instead of in Outlook.  Schedule+ 95 users cannot open Outlook users' calendars.  b) Outlook users can open each other's calendars, but they cannot open Schedule+ 95 users' calendars.  Schedule+ 95 users cannot open Outlook users' calendars.
Viewing another user's free/busy details	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>Outlook can view the free/busy details of Schedule+ 95 or Outlook users in the Meeting Planner (right mouse click).</li> <li>Schedule+ 95 users cannot view Outlook users' free/busy details.</li> </ul>
Delegate access (such as reading and writing into another user's calendar)	a) Microsoft Exchange Server b) Microsoft Mail Server c) Microsoft Exchange Server, Microsoft Mail Server, or mixed	a) Outlook users can be delegates for other Outlook users, but they cannot be delegates for Schedule+ 95 users.  b) Outlook users can be delegates for other Outlook users, but only when the Outlook option to use Schedule+ 95 for scheduling is selected.  c) Schedule+ 95 users cannot be delegates for an Outlook user.

Directly booking a meeting into another user's calendar	a) Microsoft Exchange Server b) Microsoft Mail Server c) Microsoft Exchange Server, Microsoft Mail Server, or mixed	a) Outlook can book meetings into Schedule+ 95 conference rooms or resources directly. b) Outlook can book meetings directly into Schedule+ 95 conference rooms or resources. c) Schedule+ 95 users cannot write an appointment into an Outlook user's calendar.  Outlook users cannot book into another Outlook user's calendar directly, but they can duplicate the functionality by opening the user's calendar.
Task delegation	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>• Outlook users can delegate tasks to other users by sending task request messages.</li> <li>• When Schedule+ 95 users receive a task request message from an Outlook user, the task information is displayed as body text only.</li> </ul>
Contacts	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>• Outlook Contacts can include e-mail addresses and can therefore be used to send messages.</li> <li>• Schedule+ 95 contacts can include e-mail address information, but they cannot be used to address messages.</li> </ul>
Import Schedule+ appointments, contacts, and tasks	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>• Outlook imports Schedule+ 95 data.</li> </ul>

## Outlook Interoperability with Microsoft Schedule+ 1.0

The following table summarizes interoperability differences users should know about when they upgrade to Outlook from Schedule+ 1.0.

This Outlook feature or capability	On these Microsoft workgroup servers	Interoperates this way between Outlook and Microsoft Schedule+ 1.0
Sending and receiving meeting requests or task requests	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>Both users can exchange meeting requests freely. However, Schedule+ 1.0 does not recognize some Outlook advanced message features, such as attachments and recurring meetings.</li> <li>When an Outlook user sends a task request (delegating a task) to Schedule+ 1.0 users, the Schedule+ users see the contents of the task request as body text only.</li> </ul>
Viewing another user's (published) free/busy status	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>Outlook and Schedule+ 1.0 users can view each other's published free/busy status.</li> </ul>
Viewing another user's (shared but not published) free/busy status	a) Microsoft Exchange Server b) Microsoft Mail Server or mixed c) Microsoft Exchange Server, Microsoft Mail Server, or mixed	a) Outlook users can view shared but not published free/busy status of other Outlook users. Outlook users cannot view the shared but not published free/busy times of Schedule+ 1.0 users. b) None. c) Schedule+ 1.0 users cannot view Outlook users' shared but not published free/busy status.
Opening another user's calendar	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>Outlook users can open each other's calendars.</li> <li>Schedule+ 1.0 users cannot open Outlook users' calendars.</li> </ul>
Viewing another user's free/busy details	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>Outlook can view the free/busy details of Schedule+ 1.0 or Outlook users in the Meeting Planner (right mouse click).</li> <li>Schedule+ 1.0 users cannot view Outlook users' free/busy details.</li> </ul>
Delegate access (such as reading and writing into another user's calendar)	a) Microsoft Exchange Server b) Microsoft Mail Server c) Microsoft Exchange Server, Microsoft Mail Server, or mixed	a) Outlook users can be delegates for other Outlook users, but they cannot be delegates for Schedule+ 1.0 users. b) Outlook users can be delegates for other Outlook users when the Outlook option for using Schedule+ 95 for scheduling is selected. c) Schedule+ 1.0 users cannot be delegates for an Outlook user.
Directly booking a meeting into another user's calendar	a) Microsoft Exchange Server b) Microsoft Mail Server c) Microsoft Exchange Server, Microsoft Mail Server, or mixed	a) None. b) Outlook can book meetings into Schedule+ 1.0 conference rooms or resources directly. c) Schedule+ 1.0 users cannot write an appointment into an Outlook user's calendar. Outlook users cannot book into another Outlook user's calendar directly, but they can duplicate the functionality by opening the user's calendar.
Task delegation	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>Outlook users can delegate tasks to other users by sending task request messages.</li> <li>When Schedule+ 1.0 users receive a task request message from an Outlook user, the task information is displayed as body text only.</li> </ul>

Contacts	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>• Outlook Contacts can include e-mail addresses and can therefore be used to send messages.</li> <li>• Schedule+ 1.0 does not include a contacts feature.</li> </ul>
Import Schedule+ appointments, contacts, and tasks	Microsoft Exchange Server, Microsoft Mail Server, or mixed	<ul style="list-style-type: none"> <li>• Outlook imports Schedule+ 1.0 data.</li> </ul>

## Appendix B: Terms Used in This White Paper

Most administrators may already be familiar with the terms in this appendix. However, it is a good idea to read through these definitions to be sure you understand them as they are intended in this paper.

### Delegate

A user can designate other users to be their “delegates.” As a delegate, a user can manage the owner’s e-mail and schedule, as well as create, send, and reply to messages (including meeting and task requests) on the owner’s behalf. For example, managers may give their assistants or teams access to their schedules so the assistant or team members can create messages, appointments, tasks, or other items for them.

### Direct booking

With appropriate permission, Schedule+ users can add an appointment directly into a Schedule+ resource account’s calendar, instead of sending a meeting request. For example, some organizations allow users to book times for conference rooms directly. However, by sending meeting requests, it is possible to monitor and maintain a record of who requested the resource.

To book a resource directly, the following conditions must exist:

- A Schedule+ resource account must be set up and the people who need to book the resource’s time directly must be given at least Create permission for its calendar.
- The **This is a resource** check box in the resource’s account must be selected.
- Users must invite the resource as a “resource” attendee.

### Edit another user’s calendar

An Outlook user can give other users Editor permission to specific items (such as appointments, tasks, and contacts) in his or her calendar. With Editor permission, users can add, delete, and modify items in the owner’s calendar. Editor permission does not make a user a delegate. Editor permission enables a user to modify the Outlook items specified by the owner, whereas a delegate can also send and reply to meeting requests on the owner’s behalf, in addition to modifying, or editing, the owner’s specified items.

### EFD

See *Microsoft Exchange Forms Designer*.

### Free/busy details

Users who have been given at least Read permission to another user’s calendar can not only see when that user is free or busy, but they can also view — from within the Meeting Planner — the description (details) of the appointments or activities that user has scheduled.

### Free/busy status

When users “publish” their free/busy status, other users can view the free/busy time blocks (but not necessarily their free/busy details) from within the Meeting Planner.



### **Message form**

The form in which an application displays e-mail messages it receives. In this white paper, “message form” refers to any message form, such as a custom message form, that is not one of the application’s standard message (Send Note or Reply Note) forms. See *Standard message form*.

### **Microsoft Exchange Client Preview Pane**

An add-on feature included on the Microsoft Exchange Server Technical Resource CD. The Preview Pane helps Microsoft Exchange Client users manage their messages. Microsoft Outlook supports many of the features provided by the Microsoft Exchange Client Preview Pane.

### **Microsoft Exchange Forms Designer (EFD)**

The design environment for creating Microsoft Exchange forms.

### **Non-table view**

A view that consists of more elements than simply rows and columns. For example, the Outlook Card view is a non-table view.

### **Office 97 Document Forms**

Created with Outlook Forms, Office Document Forms are based on Microsoft Office document templates, such as Microsoft Word or Microsoft Excel templates. Only Outlook users can use Office Document Forms.

### **Opening another user’s folder**

With at least Read permission, users can view another user’s folder (such as his or her calendar) to display the descriptions of the user’s items in that folder. The folder owner specifies the type of items (such as appointments, tasks, or contacts) for which the other user will have Read permission.

### **Outlook Forms**

The design environment for creating Outlook forms.

### **Permissions**

A user can give other users access to his or her folders by granting those users specific permissions. Different permissions give users different levels of access to the owner’s folders. For example, a user can give one coworker permission to read only and another coworker permission to create and modify items.

### **Published free/busy status**

Users can choose to publish their free/busy status (time blocks) to other users, so the other users can view them from within their Meeting Planners. If a user does not publish his or her free/busy status, other users cannot view that user’s free/busy status from within their Meeting Planner.

To set the option to not publish their free/busy status to others, users click **Options** from the **Tools** menu, then **Calendar**, and then click **Advanced**. Then, in **Publish x months of free/busy status**, they enter 0 (zero).

### **Standard message form**

In this white paper, “standard message form” refers to an application’s standard Send Note form or Reply Note form. See *Message form*.

## Table view

A view that consists of rows and columns. For example, the Messages view of the Inbox is a table view.

## Task delegation

Assigning a task to another user automatically, by sending the user a task request message. Outlook enables users to delegate tasks to other users by sending a task request (message) to the other users. Although Schedule+ 95 and Schedule+ 1.0 do not provide task delegation features, Schedule+ 95 and Schedule+ 1.0 users can receive task requests; however, the task information appears as text only in the message. See *Task request*.

## Task request

The message sent by Outlook users to an Outlook, Schedule+ 95, or Schedule+ 1.0 user to delegate a task to the recipient. When an Outlook user receives a task request, the task information is presented in an easy-to-use format. When a Schedule+ 95 or Schedule+ 1.0 user receives a task request, however, the task information is displayed as text only in the message. See *Task delegation*.

## Viewing (opening) another user's folder

See *Opening another user's folder*.

## Voting message

A "ballot" message Outlook users can send, receive, and track automatically. When Outlook users receive a voting message, the selections they can vote on appear as buttons in the Outlook message, and the responses are logged automatically in the sender's Inbox. When Microsoft Exchange Client and Microsoft Mail 3.x users receive voting messages from Outlook users, they receive the text of the Subject line and body of the voting message. No voting buttons are displayed.

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