Microsoft® Outlook® 2000 Interoperability

White Paper

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Introduction

If your organization is planning or considering an upgrade to Microsoft® Outlook® 2000, 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 2000 messaging and collaboration client 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 2000. 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.

This paper documents:

- **What migrating to Outlook 2000 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 2000—**How to ensure a smooth migration, and how to support a mixed environment that may include a combination of Outlook versions, Microsoft Exchange Client, Microsoft Mail 3.*x* for the Windows® operating system, 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 the enhanced application design environment of Outlook, OLE Automation support, and printing tools can help them build quality solutions for Outlook.

Outlook, like Microsoft Exchange Client, can use either Microsoft Exchange Server or Microsoft Mail 3.*x* as its messaging transport. In addition, Outlook 2000 and 98 can use Internet messaging protocols as POP3/SMTP or IMAP4. Some features, such as public folders, are available only when using the Microsoft Exchange Server transport. For a guide to which transports support which features see the *Outlook 2000 Features and Configuration Guide*.

Outlook is available on the following platforms: 32-bit Windows, Windows 3.11, and Macintosh. (The Windows 3.11 and Macintosh versions are available only with Microsoft Exchange Server.) Customers can also continue to use Microsoft Exchange client and Schedule+ for their users of Windows 3.11, Apple Macintosh, and the MS-DOS® operating system. A high level of interoperability enables users of different Microsoft messaging and collaboration clients on different platforms to send and receive mail, as well as perform group-scheduling duties. However, users who continue to use previous Microsoft messaging and group-scheduling clients cannot take full advantage of the enhanced user interface and capabilities of Outlook. 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.

For organizations that are managing an environment with Outlook 2000, 98 and 97, there are very few interoperability issues between these versions, because the versions are built with the same file format. The only interoperability issues are features introduced in Outlook 98, such as HTML mail, Stationery, vCard, vCalendar, and iCalendar—which are not supported in Outlook 97 (except vCard, which is available as an add-on to Outlook 97).

This paper focuses on the interoperability between Outlook and other Microsoft messaging and calendar clients. It does not provide comprehensive information about using, administering, or programming Outlook.

Note: There are very few differences in Outlook 2000, Outlook 98, or Outlook 97 in regards to interoperability. In this paper, "Outlook" therefore means Outlook 2000, 98, and 97 (for 32-bit Windows); version-specific issues, where they exist, will be clearly noted.

Microsoft Exchange Server 5.5 shipped with Outlook for Windows 3.1 and for Macintosh. The features of these Exchange 5.5 clients are very similar to the Microsoft Exchange clients shipped with Exchange server 5.0 and earlier. In general, information about the interoperability of Outlook 2000, 98, and 97 (32-bit) with the Microsoft Exchange Client also applies to Outlook 2000, 98, and 97 (32 bit) interoperability with Outlook for Windows 3.1 and for Macintosh unless specifically noted otherwise.

How to Use This White Paper

This white paper consists of four main parts:

• **Messaging and Collaboration —** Describes how Outlook interoperates with Microsoft Exchange Client and Microsoft Mail 3.x for Windows.

• **Calendaring and Scheduling —** Describes how Outlook interoperates with Microsoft Schedule+ 95 and Microsoft Schedule+ 1.0.

• **Other Information Management Features** – Describes how Outlook Tasks and Contacts add value and interoperate with older e-mail and scheduling clients.

• **Appendix A: Interoperability Summaries by Client —** Contains tables that provide an overview of the interoperability of Outlook 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.

This paper can 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 the advanced user interface and features of Outlook.

Messaging and Collaboration

Outlook 2000 provides Outlook 98 and 97, Exchange client, and Microsoft Mail users all the features they currently enjoy in addition to many new features. Some of the features users who are upgrading from Outlook 97 to Outlook 2000 will enjoy include the following:

- Improved ease of use.

- Support for Internet standards such as HTML Mail, IMAP, SMTP/POP3, Ical, Vcard, Vcal.

- Improved performance.

- Additions such as Outlook Today, folder home pages, Outlook bar shortcuts, stationery, multiple signatures, improved calendar views and contact functionality, and more.

For descriptions of these features and more, see the *Outlook 2000 Product Enhancement Guide*.

Users upgrading from the Microsoft Exchange Client or Microsoft Mail 3.*x* for Windows will experience many new information management capabilities. For example:

- Integrated calendar functions, along with contact, journal, and task features

- Rich, multiple views of messages

- Information organization, management, and viewing enhancements

Outlook 2000 is a straightforward upgrade for Outlook 97, 98, Microsoft Exchange Client or Microsoft Mail 3.*x* for Windows. Users can do virtually everything they did with the older clients and more.

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

Managing a Mixed Messaging and Collaboration Environment

Many organizations planning to migrate to Outlook want to ensure their users can perform basic e-mail and collaboration without interruption. Microsoft Outlook 2000 is interoperable with other Microsoft messaging and collaboration products and back-ends that take the administration hassle out of upgrading completely or managing mixed clients. In fact, there are no significant interoperability issues between exchanging messages or public folder usage between Outlook and other Microsoft messaging products. However, if users are sharing messages between Outlook 2000 or 98 and Outlook 97 using HTML

mainly, there will be a loss of formatting and embedded images in Outlook 97. In a mixed environment, an administrator may want to make sure HTML mail is not the default format, or turn off HTML mail until the whole environment is migrated. For an interoperability chart, see Appendix A.

Upgrading Messaging and Collaboration Data to Outlook

Upgrading to Outlook 2000 is simple. The Outlook Startup wizard automatically detects previous versions of Microsoft clients, as well as many third-party e-mail clients and personal information managers. It uses this information to optimize and simplify the users' configuration of Outlook 2000. The Startup wizard detects existing account information, such as Exchange Server profiles, and automatically configures Outlook to use those accounts. In addition, since Outlook 2000 allows users to store distribution lists in the Contacts folder, the Startup wizard gives users the option to automatically import the complete contents of any existing Personal Address Book or other address book into their Contacts folder in Outlook, unifying all contacts and distribution lists in one place.

Because Outlook 2000 can detect Exchange profiles, users have immediate access to information that resides on the Exchange Server when upgrading from a client running against a Microsoft Exchange server. Outlook uses Microsoft Exchange Server user accounts, so administrators do not need to create or import user accounts from Microsoft Exchange Server to Outlook. Since Outlook uses the same configuration information as Microsoft Exchange Client, Outlook users can use Microsoft Exchange Client custom forms and public folders as well as virtually all Microsoft Exchange Client extensions. 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.

For Outlook information that does not reside on a server running Exchange Server, such as PSTs and OSTs, Outlook 2000 simply reads the stores directly. Outlook 2000 will upgrade an OST. To move back from Outlook 2000 to Outlook 97 or 98, users will have to recreate their OST in Outlook 97 or 98.

To import Microsoft Exchange and Microsoft Mail client stores, users simply install Outlook and run a separate utility to import the message stores. 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. Microsoft Exchange Server includes a utility that imports Microsoft Mail message stores to an Outlook compatible format. Office Setup includes the Microsoft Mail information service that enables Outlook to use a Microsoft Mail 3.*x* post office. This service is not installed by default, however, so users must choose to install it.

The following section provides an overview of the messaging and collaboration differences between Outlook, Microsoft Exchange Client, and Microsoft Mail 3.*x.*

Messaging and Collaboration Functionality

Many organizations planning a migration want to ensure that their users can perform basic e-mail and collaboration 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 and forms.

E-mail Capabilities

Outlook 2000, 98, 97, Microsoft Exchange Client, 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 and other features summarized in the tables in Appendix A. 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.

• **Private items —**When an Outlook 2000 user marks an item (such as an e-mail or calendar item) as Private, the only other Outlook users who can view it are ones who are given permission to view private items. When an Outlook 98 user marks an item as Private, all users with delegate access can see the items. When Outlook 97 marks an item as Private, no users can view the item. However in all these cases, users running Microsoft Outlook 97 for Windows 3.1 and for Macintosh, or Exchange Client can view the item if they have been granted delegate access 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.

  This 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 —**Outlook and Microsoft Exchange Client users can both 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.

- **Voting—**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, Outlook for 16-bit Windows or Macintosh 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.

- **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 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.

- **Rules—**Microsoft Exchange client has an interface to manage rules called the "Inbox Assistant." With Outlook 97, Microsoft introduced the Rules Wizard as a robust add-on that allowed users to automatically put into folders, delete, highlight, forward, and flag incoming and outgoing e-mail so they could better manage and prioritize their e-mail. The Outlook Rules Wizard converts Inbox Assistant rules to Rules Wizard rules. Outlook 2000 and Outlook 98 have an integrated Rules Wizard. The rules wizard for Outlook 97 can be downloaded from the Outlook Web site at no cost (connect-time charges may apply). The Rules Wizard is not available for the Microsoft Exchange Client or Mail 3.x client.

- **WordMail—**Microsoft Exchange Client users can choose either Microsoft Word 95, Microsoft Word 97 or Word 2000 for WordMail. Outlook users, however, must have Microsoft Word 97 or 2000 installed to create messages using WordMail, although they can receive and read messages composed with either WordMail 95 or WordMail 97.

- **HTML-formatted mail messages—**Outlook 2000 and 98 support sending mail formatted as HTML and use of HTML mail to create "stationery." Outlook 97, Microsoft Exchange client and Mail 3.x users can't send mail formatted with HTML. When they receive HTML messages, the messages are displayed without any of the images or formatting of the original.

- **Office e-mail—**Office 2000 includes the ability to compose a particular message easily using any Office application and send the message as HTML so the application isn't required to read the message. Outlook 2000 or Outlook Express in Microsoft Internet Explorer 5.0 and Office 2000 are required for this functionality. Since this relies on HTML mail, users with applications that do not support HTML mail will receive HTML messages without any of the images or formatting the original.

- **Sending and receiving vCards –** Outlook 2000 and 98 allow users to easily send and receive contact information using the Internet standard vCard format. Outlook 97 and the Microsoft Exchange client do not support capability. (Outlook 97 can support vCard via a free add-on, available on the Microsoft Outlook Web site—connect-time charges may apply.)

Public Folder Capabilities

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 "E-mail Capabilities" section earlier.

Forms Capabilities

Upgrading to Outlook involves 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. Designers building or modifying forms for use in Outlook or mixed client environments should plan to create forms appropriate for the mix of operating systems in an organization. Outlook supports three types of forms:

• **Outlook Forms—**Forms created using the Outlook forms design environment can be used only by Outlook 2000, 98, and 97 users.

• **Exchange Forms-Designer Forms—**Forms created with the Microsoft Exchange Forms Designer (EFD) can be used by Outlook 2000, 98, 97, and Microsoft Exchange Client, but not by the Exchange Client for Macintosh or Microsoft Mail 3.x client.

• **Exchange Server 5.5 HTML Forms—**Forms implemented using Exchange Server HTML interfaces can be used by Outlook 2000, 98, 97, 16 bit Windows and Macintosh, but not by the Microsoft Exchange or Mail 3.x clients.

Exchange Forms Designer and Outlook Forms—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 Windows 3.1 and Win32® API versions) can run only Microsoft Exchange Forms Designer (EFD) forms. Outlook 2000, 98, and 97 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 Windows 3.1 and Win32 messaging users should be developed using EFD. Or, in an organization with Exchange Server 5.5 and Outlook 2000, 98, 97, Outlook for Windows 3.1 and for Macintosh, all clients can run Exchange Server 5.5 HTML 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 compiled — not interpreted — 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 the Visual Basic® development system (as EFD forms can), although

designers can add custom behavior to Outlook forms easily by using Visual Basic Scripting Edition.

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 2000 and 97 Document Forms.

Exchange Server HTML Forms - Outlook Forms created using the built-in Outlook forms design tool can be used only on Win32-based desktops where Outlook is installed. However, Exchange Server provides an alternative means of creating forms for use in collaborative applications, using Active Server Pages and the Microsoft Exchange Collaboration Data Objects (CDO) interface to scripted forms that are displayed as HTML in a Web browser. All three versions of Outlook included in Exchange Server 5.5 (Outlook 97, Outlook for Windows 3.1, and Outlook 97 for Macintosh), as well as Outlook 2000 and Outlook 98 have been extended to support Exchange Server HTML forms. These features provide Exchange sites an option for developing electronic forms that can be deployed across all operating systems.

When an Outlook form is sent to the Windows 3.1– or Macintosh-based client, it is essentially unusable—opening the item in the Windows 3.1 or Macintosh inbox does not display the actual form as the form designer intended. However, with Exchange Server 5.5, the Windows 3.1– and Macintosh-based clients will automatically launch an associated HTML form when a user opens an Outlook form from their inbox, provided Outlook Web Access is installed and enabled on the server. This HTML form is created as an additional design step, and is not automatically generated during the design of the Outlook form. The Exchange administrator associates the HTML form with the appropriate Outlook form message class.

Other Messaging and Collaboration Differences

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 or Office-mail 2000, Outlook users can also take advantage of the Replace command in messages.

• Outlook 2000, 98, and Microsoft Exchange Client can store multiple AutoSignature entries; Outlook 97 stores one. Outlook 97 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 opening it

• Outlook 2000 and 98 have the Exchange Client Preview Pane built-in to the product, but Outlook 97 only provides some of the functionality,

through an add-on. The add-on is included on the Microsoft Exchange Server Technical Resource CD.

• Outlook 2000 supports Visual Basic for Applications and COM add-ins. Outlook 2000 also includes a greatly expanded object model that boasts over two dozen new events. Support for Visual Basic for Applications, in concert with the expanded Object model, makes it much easier for developers and sophisticated end users to create compelling collaborative solutions. COM add-ins, or Office Pluggable Components, are an Office-wide standard way to extend any Office 2000 application. The architecture is simple and provides an easy way for developers to create distributable extensions to Outlook 2000 or any Office application.

Calendaring and Scheduling

Outlook 2000 provides Outlook 98, 97, and Schedule+ users with improved integrated calendaring. For example, Outlook 2000 provides Outlook 98 and Outlook 97 users with some of the following enhancements:

• Internet Group Scheduling (new in 98, enhanced in 2000)

• Enhancements in viewing calendars online with ScreenTips in Calendar Views and Calendar Background Color

• Enhancements in Calendar Printing with a details printout and word wrapping in the monthly printout.

• Meeting Planner Enhancements

• The ability to directly book resources

• Integration with Microsoft NetShow™ server and NetMeeting® conferencing software (new in 98, enhanced in 2000)

In addition, Outlook gives Schedule+ 95 and Schedule+ 1.0 users all the key features they currently have, in addition to many new information management capabilities. When Schedule+ 95 and Schedule+ 1.0 users upgrade to Outlook, the new features they'll get 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

Users can think of Outlook 2000 as a straightforward upgrade for Outlook 98, 97, 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 addition, calendar sharing using the MS Mail server will not function the same as with Schedule+ 95 and Schedule+ 1.0 (see Appendix A).

In a mixed environment consisting of Outlook and Schedule+ 95 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 administration and upgrade notes, and describes Outlook 2000, 98, 97, Schedule+ 95, and Schedule+ 1.0 interoperability issues in more detail.

Managing a Mixed Scheduling Environment

Outlook 2000, 98 and 97 share the same file format and offer almost complete group scheduling interoperability. The only differences between the versions are features that have been added to the newer versions that are not available in the older ones.

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 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 a workgroup at the same time, instead of in phases.** This step avoids interoperability differences that could cause interruptions or confusion in the way 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 step enables 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 other's 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+ 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 Windows 95 profiles and remote registry support, system administrators can set the registry key, UseSchedPlus, 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 by adding the UserCanChange value. This ensures that users don't individually move to Outlook for group scheduling until the administrator is ready for them to.

Note The option to use Schedule+ 95 for group scheduling is made at the computer level, not the user level. 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.

If you have Outlook users who have been using Schedule+ 95 for group scheduling, make sure they are aware that Outlook cannot export data back to Schedule+ 95 before switching them (or allowing them to switch) to using Outlook for scheduling. 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 Schedule+ Data to Outlook

To begin using Outlook, users of Schedule+ 95 and Schedule+ 1.0 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.

When a Schedule+ 95 user upgrades to Outlook, permissions need to be reset. This is due to the difference in file formats.

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.

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 was described in the "Managing a Mixed Scheduling Environment" section earlier.

Scheduling and Calendaring Functionality

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, but some differences do exist, as described in this section.

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). In Outlook 2000, users can tell the difference between unpublished time and free time. This is not the case with earlier products.

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.

Viewing another user's free/busy details (with read-only access)—An Outlook user can display the free or busy details of Schedule+ 95 (all users on Microsoft Exchange Server), and Schedule+ 1.0 users. Schedule+ 95 users are able to view details of an Outlook user (if all users are on Exchange Server) and if a driver has been installed. The free driver is posted on the Microsoft Outlook Web site and available in Microsoft Exchange Server 5.0 SP1 or Exchange Server 5.5 (Outlook 8.03) or later. Outlook for Macintosh users on version 8.1 or later can view Outlook users' free/busy details. Schedule+ 1.0 users cannot view Outlook users' free/busy details.

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.

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.

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

Direct booking—Outlook 2000 and Schedule+ support direct booking. Outlook 97 and 98 do not. Outlook users and resources must be on Outlook 2000 to take advantage of its direct booking feature. With the appropriate permission, any Outlook user can take advantage of the Schedule+ direct booking feature to book appointments into a Schedule+ 95 or Schedule+ 1.0 calendar directly. Schedule+ 95 and Schedule+ 1.0 users cannot book appointments into Outlook calendars directly. Outlook 97 and 98 do not support direct booking, so if resource rooms are on Outlook 97 or 98, users have to organize meetings by sending meeting requests instead of booking appointments directly into other users' calendars. However, with appropriate permission (such as Delegate), an Outlook user can open another Outlook 97 or 98 user's or resource's calendar and modify it if necessary.

With direct booking on Outlook 2000 or Schedule+, 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.

Direct booking for resources on Outlook 97 and 98 can be resolved as follows:

1. For Exchange Server 5.5 or later, a server agent script can be installed on the resource's mailbox to automatically process meeting requests sent to the Outlook resource. For more information on this approach see the Outlook Web site or contact your Microsoft sales representative.

2. Each Outlook resource account can 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.

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.

Calendar synchronization—Schedule+ 95 and Schedule+ 1.0 synchronize calendars in much the same way as Outlook 2000 and 98 do. They automatically configure important default folders such as the Calendar to work from a local synchronized folder, and synchronize the local folder with Microsoft Exchange Server periodically. This model improves the performance of Outlook 2000 and 98 over Outlook 97, and decreases the load on Microsoft Exchange Server.

The Outlook 97 calendar synchronization method is different. Users work directly on the server-based calendar by default, so there is less need for automatic background replication, but it can be slower and increase the load on Microsoft

Exchange Server. Outlook 97 users can choose to have both a server and a local copy of their Outlook 97 folder. For example, users who travel frequently or need the ability to access their Outlook 97 information from an off-line store may want to take advantage of this ability. In such cases, users can configure Outlook 97 to synchronize the folders automatically whey they log on and/or log off.

Private items—With Outlook 2000, users can decide on a per-delegate basis, whether or not the delegate can see a private calendar item. When Outlook 98 user marks an item as Private, all users with delegate access can see the items. When Outlook 97 marks an item as private, no users can view the item. However in all these cases, users running Microsoft Outlook 97 for Windows 3.1 and for Macintosh, or Exchange Client can view the item if they have been granted delegate access 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.

Publish a read-only calendar to the Web—Outlook 2000 allows users to publish a read only calendar in HTML, showing the month and details of appointments. In addition, 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.

Calendar access from the Internet—Outlook takes advantage of Microsoft Exchange Web Services in Exchange Server 5.5 and later to enable Outlook users to use any Web browser to access their Outlook data including their Calendar. This Exchange Server feature is known as Outlook Web Access. With Outlook Web Access, 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 Outlook Web Access, these users can access their Outlook data (including e-mail, calendar, and Public Folder data), using only the installed Web browser. Outlook Web Access gives users the benefit of reliable intranet and Internet security through the Windows NT® operating system, with a user interface that is familiar and convenient for Outlook users.

Group scheduling over the Internet—Outlook 2000 and 98 allow users in organizations without Exchange Server, and home users, to publish and download free/busy information from Internet servers using the iCalendar Internet standard, and to send and receive meeting requests and responses formatted in the iCalendar Internet standard format. These features are not available in Outlook 97, Schedule+ 95, or Schedule+ 1.0. Note: sending and receiving in iCalendar are available in Internet only configuration.

Other Scheduling and Calendaring Differences for Outlook users

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

- Outlook 97 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. (Does not apply to Outlook 2000 or 98.)

- The Outlook enhanced meeting interface, 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. Although 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 can 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.

- Outlook does not include the Covey Seven Habits feature that is included in Schedule+ 95

Other Information Management Features

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 in 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 of 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.

Integration with Microsoft Project 95

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.

Integration with Microsoft Project 98

The workgroup features of Project 98 integrate with Outlook in much the same way as previous versions of Project integrated with Microsoft Mail and Schedule+. In order for team members to use these features, they need to run the workgroup setup routine that project managers can distribute to their team (there is no charge for this). This setup allows team members to view the custom e-mail messages that Microsoft Project generates. Project managers can use the TeamAssign feature to send custom e-mail messages to team members to assign them project tasks, and these messages are received in the team member's Outlook inbox.

Once the team member has officially "accepted" the task and sent his/her response back to the project manager, the tasks are automatically logged in the team member's Outlook Task List. The tasks are grouped under a new category that corresponds to the project name. The team member can then keep track of his/her task status (using the % complete field in the task list) right in the Outlook task list. With previous versions of Project, project managers had to send TeamStatus messages to team members in order for the team members to submit status reports. However Project 98 adds a new menu item called "New TeamStatus Report" to the Outlook Tasks menu. This allows team members to generate and submit TeamStatus reports without waiting for the project manager to ask for them.

When the team member selects this command, a custom "TeamStatus" e-mail message is created and stored in the Outlook inbox. If he/she has been tracking task status in the task list, then that status information is automatically added to the TeamStatus report. Users can then simply open it and send it along to the project manager. In addition, they can also use the TeamStatus message to

track task status, save and store it in the Inbox until they are ready to submit it to the project manager.

Microsoft Project 98 offers additional integration with Outlook. From within Project, Outlook reminders can be set up. Project items can be journaled in Outlook.

Contacts

Outlook 2000 provides a rich Contacts feature that helps users keep their business and personal contact information up to date. The following are some of the improvements over Outlook 97 and 98:

• **Personal Distribution Lists—**Users can create Distribution Lists consisting of Contacts from one or more Contacts folders and the Microsoft Exchange Server Global Address List.

• **Contact Activity Tracking—**Users can keep track of all e-mail, tasks, appointments and documents related (linked) to each contact.

• **AutoMerge Contact Information—**Before adding a new Contact, Outlook intelligently warns if it might be a duplicate and gives the option to automatically merge the new information.

• **Automatically imports the PAB (Personal Address Book) into Outlook contacts—**Since Outlook Contacts can now support distribution lists, there is little reason why a user would want to keep both a PAB and an Outlook Contacts list. During setup, Outlook can import a users PAB entries into his or her Outlook Contacts list.

• **Vcard—**Outlook 2000 and 98 users can send and receive contact information using the Internet standard vCard format. Outlook 97 users can use an add-on available from the Outlook Web site to import and export contacts as vCards.

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).

• **Unification of Contacts and Personal Address Book—**Outlook 2000 users can place all of their personal addresses and distribution lists into their Outlook Contacts. Outlook 98 and 97 users must store personal e-mail distribution lists in their PABs. For Outlook 98 and 97 users to duplicate the effect of personal distribution lists in their contacts they can follow these quick steps:

　　1.　For each recipient to be included in a 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 "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.

In addition, Outlook 2000 can add Public Folder Addresses to Outlook 2000 Contact folders. In earlier versions they could just be added to the PAB. When a user chooses the Add to Personal Address Book option, the alias will be added to whatever option is set for where personal addresses are kept.

- **Specifying Rich Text Mail Format** - The option to Always Send to This Recipient in Microsoft Outlook Rich-Text Format is available in Outlook 97 and the Corporate/Workgroup configuration of Outlook 2000 and 98. You can set this option in one of three ways:

    - For users stored in the Personal Address Book (PAB), open the Address Book dialog box (Tools menu), select the recipient from the PAB, and set the option in the General tab for that recipient.

    - For users stored in Contacts, go to the contact folder and select the contact. Open the contact and double-click on the contact's e-mail address. You can set the option in the E-mail Properties dialog box.

    - For one-off addresses directly typed in the recipient field of an e-mail message, double-click on the e-mail address after it has been resolved and set the option.

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 the Outlook 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.

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 offers functionality equivalent to that of Schedule+ and more. 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.

Conclusion

Outlook 2000 provides organizations numerous benefits in messaging, calendaring, scheduling, and other information management features. When upgrading to Outlook 2000, organizations want to ensure that their users can perform basic functions without interruptions. Since Outlook 2000 shares the same file format as Outlook 98 and 97, upgrading can be seamless. With a bit of planning, upgrading from Exchange or Microsoft Mail can be done smoothly as well.

More Information

For more information on Outlook 2000, see http://www.microsoft.com/office/.

For Information on how to install and deploy Outlook 2000, see the *Office Resource Kit*.

For more information on Outlook for Macintosh, see http://www.microsoft.com/exchange

Appendix A: Interoperability Summaries by Client

The tables in this section give you an overview of Outlook interoperability with each Microsoft messaging and collaboration 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 2000, 98, and 97 Interoperability with Outlook for Windows 3.1, Outlook 97 for Macintosh, and Microsoft Exchange Client

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

Note: Microsoft Exchange Server 5.5 shipped with Outlook clients for Windows 3.1 and for Macintosh. The features of these clients are very similar to the Microsoft Exchange clients shipped with Exchange server 5.0 and earlier. In the following table, information about interoperability of Outlook with the Microsoft Exchange Client also applies to Outlook 2000, 98, and 97 interoperability with Outlook for Windows 3.1 and for Macintosh unless otherwise noted.

This Outlook 2000, 98, and 97 feature or capability	On these Microsoft workgroup servers	Interoperates this way with Outlook for Windows 3.1 and for Macintosh, and Microsoft Exchange Client
Sending and receiving e-mail messages	Microsoft Exchange Server, Microsoft Mail Server, or mixed	• Both clients can exchange messages freely. However, Microsoft Exchange Client does not use the Outlook standard message form, so it displays an Outlook message in the Microsoft Exchange Client standard message form. • Outlook for Windows 3.1 and Macintosh clients for Exchange can exchange voting messages and messages with Follow Up Flags such as "Reply By." • Microsoft Exchange Client does not support the advanced functionality of Outlook. When it displays a message created by an Outlook user, it ignores Outlook message properties, such as voting buttons, and Follow up Flags, such as Reply By.
Views (including saved views)	Microsoft Exchange Server, Microsoft Mail Server, or mixed	• Microsoft Exchange Client cannot display any Outlook non-table views. • 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. • Outlook users can use saved views created by Microsoft Exchange Client. • Microsoft Exchange Client users cannot use saved views created by Outlook, unless the Outlook user has selected the Save views in Exchange 4.0 format property for the Outlook folder. If this property is selected, Microsoft Exchange Client users can view table views saved by Outlook users.
Custom field types	Microsoft Exchange Server, Microsoft Mail Server, or mixed	• Microsoft Exchange Client cannot use some Outlook custom field types, such as formula fields.
Rich text in messages	Microsoft Exchange	• Outlook and Microsoft Exchange Client support rich text in

This Outlook 2000, 98, and 97 feature or capability	On these Microsoft workgroup servers	Interoperates this way with Outlook for Windows 3.1 and for Macintosh, and Microsoft Exchange Client
	Server, Microsoft Mail Server, or mixed	messages.
Message attachments and embedded objects	Microsoft Exchange Server, Microsoft Mail Server, or mixed	• Outlook and Microsoft Exchange Client users can send and receive messages with attachments and embedded objects. • Outlook and Microsoft Exchange Client users can also send and receive messages that have other messages attached. • As clients for a Microsoft Mail server, Outlook and Microsoft Exchange Client users can receive attachments and embedded objects.
Embedded hyperlinks in messages	Microsoft Exchange Server, Microsoft Mail Server, or mixed	• Outlook and Microsoft Exchange Client support messages with embedded hyperlink jumps.
Sending contact information as an Internet vCard attachment.	Microsoft Exchange Server, Microsoft Mail Server, or mixed	• Only Outlook 2000, 98 and 97 can import and export contacts as vCards.
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	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) 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.
Forms	Microsoft Exchange Server, Microsoft Mail Server, or mixed	▪ Outlook 2000, 98, 97, for Windows 3.1 and for Macintosh versions can use Exchange Server 5.5 HTML forms. ▪ Outlook 2000, 98, 97, Windows 3.1, and Microsoft Exchange Client Win32 and Windows 3.1 can use EFD forms. ▪ Only Outlook 2000, 98, 97 can use Outlook or Office forms. ▪ No support for any forms by Microsoft Mail 3.x clients or MS DOS clients.
Message size	Microsoft Exchange Server, Microsoft Mail Server, or mixed	• Outlook and Microsoft Exchange Client messages can be of any size (subject to system resources).
WordMail	Microsoft Exchange Server, Microsoft Mail Server, or mixed	• Microsoft Exchange Client users can use either Microsoft Word 95 or Microsoft Word 97 for WordMail. • Outlook users must use Microsoft Word 97 or 2000 for WordMail.
Send/Receive Meeting Requests	a) Microsoft Exchange Server b) Microsoft Mail Server	a) Outlook 2000, 98, 97, for Windows 3.1 and for Macintosh clients can send and receive meetings requests. b) Outlook 2000, Win 16 and Macintosh clients can send and receive meetings requests with MS Mail clients.
View Free/Busy Calendaring Details	a) Microsoft	a) Outlook 2000, 98, 97, for Windows 3.1 and for Macintosh

This Outlook 2000, 98, and 97 feature or capability	On these Microsoft workgroup servers	Interoperates this way with Outlook for Windows 3.1 and for Macintosh, and Microsoft Exchange Client
	Exchange Server	clients can exchange calendar free/busy information.
	b) Microsoft Mail Server	b) Outlook 2000, 98, 97, for Windows 3.1 and for Macintosh clients can exchange free/busy information with MS Mail clients.
View Calendar Details	a) Microsoft Exchange Server b) Microsoft Mail Server	a) Outlook 2000, 98, 97, for Windows 3.1 and for Macintosh clients can view calendar details. Outlook 2000, 98 and 97 clients can read/write to other Outlook 2000, 98 and 97 calendars (plus delegate access), as well as to Outlook for Macintosh calendars and Schedule+ calendars. However, Outlook for Macintosh has read only calendar detail access of Outlook 2000, 98 and 97 calendars, but can read/write the details to other Outlook for Macintosh calendars (delegate access) and Schedule+ calendars b) Outlook 2000, 98, 97, for Windows 3.1 and for Macintosh Clients cannot view calendar details of MS Mail clients
Calendar Delegate Access	a) Microsoft Exchange Server b) Microsoft Mail Server	a) Outlook 2000, 98, and 97 clients can provide delegate access to other Outlook 2000, 98, and 97 and Schedule+ clients (Windows 32-bit) only.* Outlook for Macintosh can provide delegate access to other Outlook for Macintosh clients as well as Schedule+ clients. Outlook 2000, 98, and 97 cannot provide delegate access to Outlook for Macintosh or Outlook for Windows 3.1, nor can Outlook for Macintosh or Outlook for Windows 3.1 provide delegate access to Outlook 2000, 98 and 97. b) There is no delegate access capabilities between MS Mail and Exchange. *Note: users must install the proper software to enable this. Refer to the *Microsoft Office Resource Kit* for more details.
Office E-mail feature in Outlook 2000	Microsoft Exchange Server, Microsoft Mail Server, or mixed	• Outlook 97 and Older Mail clients that do not understand HTML will convert the HTML to RTF, causing some loss information and embedded images.
HTML Mail Feature in Outlook 2000 and Outlook 98	Microsoft Exchange Server, Microsoft Mail Server, or mixed	• Outlook 97 and older Mail clients that do not understand HTML will convert the HTML to RTF, causing some loss information and embedded images.

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	• Both clients can exchange messages freely. However, Microsoft Mail 3.*x* ignores Outlook message properties, such as voting buttons, and follow up flags, such as "Reply By."
Views	Microsoft Exchange Server, Microsoft Mail Server, or mixed	• Microsoft Mail 3.*x* client cannot display any Outlook non-table views.
Custom field types	Microsoft Exchange Server, Microsoft Mail Server, or mixed	• Microsoft Exchange Client and Microsoft Mail 3.*x* client cannot use some of the custom field types in Outlook, such as formula fields.
Rich text in messages	Microsoft Exchange Server, Microsoft Mail Server, or mixed	• Outlook and Microsoft Exchange Client support rich text in messages. • Microsoft Mail 3.*x* client does not support rich text, so it displays rich text in received messages as plain text.
Message attachments and embedded objects	Microsoft Exchange Server, Microsoft Mail Server, or mixed	• Outlook and Microsoft Mail 3.*x* users can send and receive messages with attachments. • Outlook users can also send and receive messages with embedded objects or other messages attached. • Microsoft Mail 3.*x* does not support embedded objects or attached messages, and displays them as plain text in messages.
Embedded hyperlinks in messages	Microsoft Exchange Server, Microsoft Mail Server, or mixed	• Outlook supports messages with embedded hyperlink jumps. • Microsoft Mail 3.*x* displays embedded hyperlinks as plain text.
Sending contact information as an Internet vCard attachment.	Microsoft Exchange Server, Microsoft Mail Server, or mixed	• Only Outlook 2000, 98 and 97 can import and export contacts as vCards.
Public folders	Microsoft Exchange Server, Microsoft Mail Server, or mixed	• Microsoft Mail 3.*x* users cannot access Outlook public folders. • Public folders are not supported on Microsoft Mail Server.
Forms	Microsoft Exchange Server, Microsoft Mail Server, or mixed	• Microsoft Mail 3.*x* client cannot view or use any personal or public folder forms created in Outlook with Outlook Forms.
Message size	Microsoft Exchange Server, Microsoft Mail Server, or mixed	• Outlook messages can be of any size (subject to system resources), whereas Microsoft Mail 3.*x* messages have size restrictions.
Office e-mail feature in Outlook 2000	Microsoft Exchange Server, Microsoft Mail Server, or mixed	• Outlook 97 and Older Mail clients that do not understand HTML will convert the HTML to RTF, causing some loss information and embedded images.
HTML Mail feature in Outlook 2000 and Outlook 98	Microsoft Exchange Server, Microsoft Mail Server, or mixed	• Outlook 97 and Older Mail clients that do not understand HTML will convert the HTML to RTF, causing some loss information and embedded images.

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	• Both users can exchange meeting requests freely. • 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.
Viewing another user's (published) free/busy status	Microsoft Exchange Server, Microsoft Mail Server, or mixed	• Outlook and Schedule+ 95 users can view each other's published free/busy status.
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) None
Viewing another user's free/busy details	Microsoft Exchange Server, Microsoft Mail Server, or mixed	• Outlook can view the free/busy details of Schedule+ 95 or Outlook users in the Meeting Planner (right mouse click) if all users are on Exchange Server. • Schedule+ 1.0 users and Schedule+ 95 users can view Outlook users' free/busy details if the appropriate driver is installed. (See the Outlook Web site for information on the drivers.)
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	a) Outlook can book meetings into Schedule+ 95 conference rooms or resources directly. b) Outlook can book meetings into Schedule+ 95 conference rooms or resources directly. c) Schedule+ 95 users cannot write an appointment into an Outlook user's calendar.

	mixed	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	• Outlook users can delegate tasks to other users by sending task request messages. • When Schedule+ 95 users receive a task request message from an Outlook user, the task information is displayed as body text only.
Contacts	Microsoft Exchange Server, Microsoft Mail Server, or mixed	• Outlook Contacts can include e-mail addresses and can therefore be used to send messages. • Schedule+ 95 contacts can include e-mail address information, but they cannot be used to address messages.
Import Schedule+ appointments, contacts, and tasks	Microsoft Exchange Server, Microsoft Mail Server, or mixed	• Outlook imports Schedule+ 95 data.
Group Scheduling over the Internet	Microsoft Exchange Server, Microsoft Mail Server, or mixed	• Outlook 2000 and 98 allow users in organizations without Exchange Server, and home users, to publish and download free/busy information from Internet servers using the iCalendar Internet standard, and to send and receive meeting requests and responses formatted in the vCalendar Internet standard format. These features are not available in Outlook 97, Schedule+ 95 or Schedule+ 1.0.

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	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. 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.
Viewing another user's (published) free/busy status	Microsoft Exchange Server, Microsoft Mail Server, or mixed	Outlook and Schedule+ 1.0 users can view each other's published free/busy status.
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	Outlook users can open each other's calendars. Schedule+ 1.0 users cannot open Outlook users' calendars.
Viewing another user's free/busy details	Microsoft Exchange Server, Microsoft Mail Server, or mixed	Outlook can view the free/busy details of Schedule+ 1.0 users (in the Outlook Meeting Planner.) Schedule+ 1.0 users cannot view Outlook users' free/busy details.
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	Outlook users can delegate tasks to other users by sending task request messages. When Schedule+ 1.0 users receive a task request message from an Outlook user, the task information is displayed as body text only.
Contacts	Microsoft Exchange Server, Microsoft Mail	Outlook Contacts can include e-mail addresses and can therefore be used to send messages.

	Server, or mixed	Schedule+ 1.0 does not include a contacts feature.
Import Schedule+ appointments, contacts, and tasks	Microsoft Exchange Server, Microsoft Mail Server, or mixed	Outlook imports Schedule+ 1.0 data.
Group Scheduling over the Internet	Microsoft Exchange Server, Microsoft Mail Server, or mixed	Outlook 2000 and 98 allow users in organizations without Exchange Server, and home users, to publish and download free/busy information from Internet servers using the iCalendar Internet standard, and to send and receive meeting requests and responses formatted in the vCalendar Internet standard format. These features are not available in Outlook 97, Schedule+ 95 or Schedule+ 1.0.

Appendix B: Terms Used in This White Paper

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

Delegate 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 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.

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 Forms created using the Outlook forms design environment.

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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