



## About the Address Book


Use the [Address Book](#) dialog box to look up e-mail and fax information when you address messages. Use the Contacts folder to store and retrieve all types of information about others such as street addresses, telephone numbers, e-mail addresses, fax phone numbers, and Web page addresses. To open the Address Book dialog box, click **Address Book**  or click **Address Book** on the **Tools** menu.

There can be several types of address books in the Address Book dialog box including the [Global Address List](#), [Personal Address Book](#), and [Outlook Address Book](#). Select these address books in the **Show names from the** box. Contacts in the Contacts folder that include an entry in the **E-mail** field or one of the fax phone number fields automatically appear in the Outlook Address Book. For information about how to specify which address book appears first, click .

## Copy the Global Address List to your computer

- On the **Tools** menu, point to **Synchronize**, and then click **Download Address Book**.

### Notes

- If you want to send sealed messages while offline, be sure to click **Download offline address book** to include details information. For information about security features such as how to seal messages, click .
- If you work offline but are connected to your network, or if you work with a dial-up connection, this command connects to the server, downloads the offline address book, and then disconnects.


## Address a message


- To quickly address a message, type the names of the recipients in the **To**, **Cc**, and **Bcc** boxes of a message. Separate names with a semicolon (;).

## **Address a message to someone on another e-mail system**


- 1** Create a message.
- 2** Click the **To**, **Cc**, or **Bcc** button.  
If you are in the contact item, click the **Tools** menu, and then click **Address Book**.
- 3** Click **New**.
- 4** Click **In this message only**.
- 5** In the **Select the entry type** box, click the type of e-mail system you want to address a message for.
- 6** Click **OK**.
- 7** Select the options you want.  
For Help on an option, click **Help**.

## Create a personal distribution list

You must have a [Personal Address Book](#) set up in your user [profile](#) to create a [personal distribution list](#). For information about how to add a Personal Address Book to your profile, click .

- 1 On the **Tools** menu, click **Address Book**.
- 2 Click **New Entry** .
- 3 In the **Select the entry type** box, click **Personal Distribution List**, and then click **OK**.
- 4 In the **Name** box, type a name for the group.
- 5 Click **Add/Remove members**.
- 6 In the **Show names from the** box, select the address book that contains the names you want to add to your personal distribution list.
- 7 In the **Type name or select from list** box, type each name you want to add. In the list below, double-click each name.

## Delete a personal distribution list

- 1 On the **Tools** menu, click **Address Book**.
- 2 In the **Show names from the** box, click **Personal Address Book**.
- 3 In the **Type name or select from list** box, type the name of the personal distribution list you want to delete. In the list below, double-click the name.
- 4 Click **Delete** .

## **Add a name to a personal distribution list**


- 1** On the **Tools** menu, click **Address Book**.
- 2** In the **Show names from the** box, click **Personal Address Book**.
- 3** In the **Type name or select from list** box, type the name of the personal distribution list you want to add a name to. In the list below, double-click the name.
- 4** Click **Add/Remove members**.
- 5** In the **Show names from the** box, select the address book that contains the names you want to add to the personal distribution list.
- 6** In the **Type name or select from list** box, type each name you want to add. In the list below, double-click each name.

## **Remove a name from a personal distribution list**

- 1** On the **Tools** menu, click **Address Book**.
- 2** In the **Show names from the** box, click **Personal Address Book**.
- 3** In the **Type name or select from list** box, type the name of the personal distribution list you want to remove a name from. In the list below, double-click the name.
- 4** Click **Add/Remove members**.
- 5** In the **Personal distribution list** box, select the name you want to remove, and then press **DELETE**.



## Find names in the Address Book

- 1 On the **Tools** menu, click **Address Book**.
- 2 In the **Show names from the** box, click the address book you want to search for names in.
- 3 Click **Find** .
- 4 Select the options you want.

## **Get information about a name in the Address Book**

- 1** On the **Tools** menu, click **Address Book**.
- 2** In the **Show names from the** box, click the address book that contains the name you want information about.
- 3** In the **Type name or select from list** box, type the name you want. In the list below, double-click the name.


## **Set up a Contacts folder to display in the Address Book dialog box**

- 1** If the Folder List is not visible, click the **View** menu, and then click **Folder List**.
- 2** Click the Contacts folder you want to display in the Address Book dialog box.
- 3** On the **File** menu, point to **Folder**, click **Properties**, and then click the **Outlook Address Book** tab.
- 4** Select the **Show this folder as an e-mail Address Book** check box.
- 5** In the **Name of address book** box, type the name for the Contacts folder you want to appear in the **Show names from the** box in the Address Book dialog box.

## **Remove a Contacts folder displayed in the Address Book dialog box**

- 1** If the Folder List is not visible, click the **View** menu, and then click **Folder List**.
- 2** Click the Contacts folder you want to remove from the Address Book dialog box.
- 3** On the **File** menu, point to **Folder**, click **Properties**, and then click the **Outlook Address Book** tab.
- 4** Clear the **Show this folder as an e-mail Address Book** check box.

## Specify the address book to appear first

- 1 Click **Inbox** 
- 2 On the **Tools** menu, click **Services**, and then click the **Addressing** tab.
- 3 In the **Show this address list first** box, click the address book you want to appear first.  
If you want a Contacts folder to appear first, you must select the Contacts folder name, not **Outlook Address Book**.
- 4 Quit and restart Outlook.

## Change the order in which address books are checked for names




- 1 Click **Inbox**
- 2 On the **Tools** menu, click **Services**, and then click the **Addressing** tab.
- 3 In the **When sending mail** box, click the address book you want to move.
- 4 Click the up and down arrows next to the **When sending mail** box. Address books in this box are checked from top to bottom.
- 5 Click **OK**.
- 6 Quit and restart Outlook.

## Add an address book to be checked for names



- 1 Click **Inbox**.
- 2 On the **Tools** menu, click **Services**, and then click the **Addressing** tab.
- 3 Click **Add**.
- 4 In the **Address lists** box, click the address book you want to add.  
If you want to add a Contacts folder, you must select the Contacts folder name, not **Outlook Address Book**.
- 5 Click **Add**, and then click **OK** twice.
- 6 Quit and restart Outlook.

## Remove an address book to be checked for names

- 1 Click **Inbox** 
- 2 On the **Tools** menu, click **Services**, and then click the **Addressing** tab.
- 3 In the **When sending mail** box, click the address book you want to remove.
- 4 Click **Remove**.
- 5 Quit and restart Outlook.




## Troubleshoot the Address Book

### What do you need help with?

- » I can't find a contact in the Address Book.
- » I added a new name to the Address Book, but it doesn't appear in my contact list.
- » What do the wavy red and green underlines mean?
- » When I try to select a contacts folder in the Address Book dialog box, I get an error.

## **I added a new name to the Address Book, but it doesn't appear in my contact list.**

Any name you add in the Address Book dialog box is added to your Personal Address Book. Entries in the Personal Address Book are not updated to the Contacts folder. You must add the contact first to your contact list and include an entry in the **E-mail** field or one of the fax phone number fields for the contact. Then the contact will appear in your Contacts folder under the Outlook Address Book heading in the **Show names from the box** (in the Address Book dialog box). For information about how to add a contact, click .



## Accept meeting requests for another person as a delegate


1 Open the manager's Inbox if the manager's meeting requests are not being sent directly to you.

 How?

2 Open the meeting request.

 How?

3 Click **Accept**  **Tentative**

 or **Decline**



## Schedule an appointment for another person

If you are not a delegate, you must have author or editor permission to carry out this procedure.

1 Open the manager's Calendar.

 How?


2 On the **File** menu, point to **New**, and then click **Appointment**.

3 In the **Subject** box, type a description.

4 In the **Location** box, enter the location.

5 Enter start and end times.

6 Select other options you want.

7 Click **Save and Close** .

## **Remove sharing permissions for a delegate**


- 1** On the **Tools** menu, click **Options**, and then click the **Delegates** tab.
- 2** In the **Delegates** box, click the name of the delegate you want to remove permissions for.
- 3** Click **Remove**.

**Tip** To remove multiple delegates simultaneously, hold down CTRL and click the delegates, and then click **Remove**.

## **Send meeting requests and responses only to my delegate, not to me**

- 1** On the **Tools** menu, click **Options**, and then click the **Delegates** tab.
- 2** Select the **Send meeting requests and responses only to my delegates, not to me** check box.

## Set sharing permissions for a delegate


- 1 On the **Tools** menu, click **Options**, and then click the **Delegates** tab.
- 2 Click **Add**.
- 3 In the **Type name or select from list** box, type the name of the delegate you want to set permissions for.
- 4 Click **Add**, and then click **OK**.
- 5 Select the permissions for each Outlook folder you want the delegate to have access to. For more information about delegate access permissions, click .
- 6 To send a message to notify the delegate of the delegate status and permissions you set, select the **Automatically send a message to delegate summarizing these permissions** check box.

### Notes

- If you want your delegate to be sent copies of your meeting requests and responses, give the delegate editor permission to your Calendar, and then select the **Delegate receives copies of meeting-related messages sent to me** check box.
- To add multiple delegates simultaneously, select multiple names in the Add Users dialog box. The permissions you select will apply to all of the delegates.



## Change sharing permissions for a delegate

- 1 On the **Tools** menu, click **Options**, and then click the **Delegates** tab.
  - 2 In the **Delegates** box, click the delegate you want to change permissions for.
  - 3 Click **Permissions**, and then change the permissions for any Outlook folder that the delegate has access to. For information about delegate access permissions, click .
  - 4 To send a message to notify the delegate of the changed permissions, select the **Automatically send a message to delegate summarizing these permissions** check box.
- Note** If you want your delegate to be sent copies of meeting requests and responses sent to you, give the delegate editor permission to your Calendar, and then select the **Delegate receives copies of meeting-related messages sent to me** check box.

## Troubleshoot Delegate Access

What do you need help with?

- » [The \*\*Delegates\*\* tab is not available.](#)
- » [Why can't I see an appointment in another person's Calendar if I'm the delegate?](#)
- » [Why do I receive meeting requests and responses my delegate should get?](#)
- » [How do I change the order of tasks in a task list as a delegate?](#)
- » [I'm a delegate, but I can't open the other person's folders.](#)
- » [The \*\*Add\*\* button is unavailable on the \*\*Delegates\*\* tab.](#)

### **The Add button is unavailable on the Delegates tab.**

To have delegates open your Outlook folders, your mail must be delivered to your mailbox on the server, not to a personal folder file on your hard disk. If you have your mail delivered to a personal folder file, you can use the **Delegates** tab to add delegates who already have permission to send on your behalf, but you cannot use it to add new delegates.

### **I'm a delegate, but I can't open the other person's folders.**

- You may not be connected to the Microsoft Exchange Server computer. Verify that you are connected to the server.
- You may not have sufficient permissions. Ask the person who granted you delegate access to perform the following steps to verify the permissions granted to you: On the **Tools** menu, point to **Options**, and then click the **Delegates** tab. Click the delegate's name in the **Delegates** box, and then click **Permissions**.

## **Why can't I see an appointment in another person's Calendar if I'm the delegate?**

Even though you have delegate access permission to the other person's Calendar, if the other person created an appointment and marked it private, you cannot view the appointment. When you view days in Calendar, you can't see the appointment details, but the free/busy time shows that this time is not available. To view this appointment, have the person who granted you permission clear the **Private** check box on the **Appointment** tab in the appointment.


## Why do I receive meeting requests and responses my delegate should get?


- The person you set up as your delegate has been deleted from the Microsoft Exchange [Global Address List](#), or there has been an internal rule-handling failure on the server. To reset your delegate's permissions, click the **Tools** menu, click **Options**, and then click the **Delegates** tab.
- The **Send meeting requests and responses only to my delegates, not to me** check box is not selected. On the **Tools** menu, click **Options**, and then click the **Delegates** tab to select it.

## About Delegate Access

Just as you might have an assistant who helps you manage your incoming paper mail, Microsoft Outlook provides similar functionality by making it possible for you to give another person delegate access to your Inbox and any other Outlook folder you want. The process of granting permission to someone to open your folders, create items, and respond to requests for you is called delegate access.

If you want to use the Delegate Access feature with the Remote Mail feature, your mail must be delivered to your mailbox on the server, not to a personal folder file (.pst) on your hard disk. If you have your mail delivered to a .pst file, you can use the **Delegates** tab (on the **Tools** menu, click **Options**) to add delegates who already have permission to send on your behalf, but you can't use it to add new delegates.

The Delegate Access feature is available only with Microsoft Exchange Server. You must be connected to the server. The add-in that contains the Delegate Access feature must be set up. To check this, click the **Tools** menu, and then click **Options**. On the **General** tab, click **Advanced Options**, and then click **Add-In Manager**. Check to see whether the **Delegate Access** check box is available and selected. If the **Delegate Access** check box is not available, you must set up the add-in. For information about how to set up an add-in, click .

As the person granting permission, you determine the level of access (permission) the delegate has. If you grant someone access to your folders, that delegate has access to the personal items in the folders. To give a person any level of delegate access means that person has send-on-behalf-of permissions. For more information about delegate access permissions, click .

A delegate can send messages on your behalf. If the delegate has access to your Inbox, the delegate can reply to your mail on your behalf. The delegate can also organize meetings on your behalf and respond to meeting requests sent to you. A delegate can also respond to task requests sent to you.

If you receive notification that you have been granted delegate access permission, you can open another person's Outlook folders. To do this, click the **File** menu, point to **Open**, and then click **Other User's Folder**.

## Open another person's folder

- 1 On the **File** menu, point to **Open**, and then click **Other User's Folder**.
- 2 In the **Name** box, type the name of the person who granted you sharing or delegate access permission, or click **Name** to select from a list.
- 3 In the **Folder** box, click the folder you want to open.

**Note** If you have author or editor permission, any items you create while the shared folder is active are stored in the other person's folder.



## Add another person's mailbox to your user profile


1 Click **Inbox** 

2 On the **Tools** menu, click **Services**.

3 In the **The following information services are set up in this profile** box, click **Microsoft Exchange Server**.

4 Click **Properties**, and then click the **Advanced** tab.

5 Click **Add**, and then type the mailbox name of the person whose mailbox you want to add to your user profile.

**Note** The manager's mailbox must already be set up as a shared folder before a delegate can carry out this procedure. For information about how the manager can set up the mailbox as a shared folder, click .

## Share your mailbox folder

- 1 If the Folder List is not visible, on the **View** menu, click **Folder List**.
- 2 Right-click the mailbox folder you want to share, and then click **Properties** on the shortcut menu.
- 3 Click the **Permissions** tab, and then click **Add**.
- 4 In the **Type name or select from list** box, type or select the name of the person you want to grant share permissions to.
- 5 Click **Add**, and then click **OK**.
- 6 In the **Name** box, click the name of the person you want.
- 7 In the **Roles** box, click **Reviewer**.

## **Remove sharing permissions for a folder**

- 1** If the Folder List is not visible, on the **View** menu, click **Folder List**.
- 2** Right -click the folder you want, and then click **Properties** on the shortcut menu.
- 3** Click the **Permissions** tab.
- 4** In the **Name** box, click the name of the person you want to remove sharing permission for.
- 5** Click **Remove**.


## Reply to a mail message in the manager's Inbox on behalf of the manager


1 Open the manager's Inbox.

 How?

2 Open the mail message you want to reply to.

 How?

3 To reply to only the sender of the message, click **Reply** .

To reply to all recipients in the **To** and **Cc** boxes, click **Reply to All** .

4 In the text box, type your response.

5 Click **Send** .

## Schedule a meeting on behalf of another person

1 Open the other person's Calendar.

 How?

2 On the **File** menu, point to **New**, and then click **Meeting Request**.

3 In the **To** box, type the attendee names or click **To** to select from a list..

4 In the **Subject** box, type a description.

5 In the **Location** box, type the location of the meeting.

6 Type the start and end times.

7 Select other options you want.

8 Click **Send** .

## Create a task request as a delegate

1 Open the other person's Tasks folder.

 How?


2 On the **File** menu, point to **New**, and then click **New Task Request**.

3 In the **To** box, type the name of the person you want to assign the task to, or click **To** to select the name from a list.


4 In the **Subject** box, type a task name.

5 Select the time frame and status options you want.






6 If you want the task to repeat, click **Recurrence** , select the options you want, and then click **OK**.

For Help on an option, click the question mark , and then click the option.

7 In the text box, type instructions or information about the task.

8 Click **Send**  **Note** Responses to the task request will be sent to the other person.

## Respond to a task request as a delegate

- 1 Open the other person's Inbox.  
 How?
- 2 Open the message that contains the task request.  
 How?
- 3 Click **Accept**  or **Decline**  
.
- 4 If you want to comment, type your comments in the text box.
- 5 Click **Send** .

## Create a task in another person's Tasks folder

1 Open the other person's Tasks folder.


 How?


2 On the **File** menu, point to **New**, and then click **Task**.

3 In the **Subject** box, type a task name.

4 Select the options you want.

5 If you want the task to repeat, click **Recurrence** , select the options you want, and then click **OK**.

For Help on an option, click the question mark , and then click the option.

6 Click **Save and Close** .

**Tip** To quickly add a task to the task list, click **Click here to add a new task**, type a task name, and then press ENTER.



## Delegate Access permissions


With any delegate access permission listed below, you have send-on-behalf-of permission. This means that, as a delegate, you can add the **From** box (in a new message, on the **View** menu) to e-mail messages, and then send the messages on your manager's behalf. Messages sent this way contain both the manager's and delegate's names. Message recipients see the manager's name in the **Sent On Behalf Of** box and the delegate's name in the **From** box.

A delegate must have both editor permission in a manager's Calendar or Tasks folder and reviewer permission in the manager's Inbox to accept meeting or task requests for the manager.

If a manager selects the **Send meeting requests and responses only to my delegates, not to me** check box on the **Delegates** tab (on the **Tools** menu, click **Options**), then the delegate does not need reviewer permission in the manager's Inbox; the meeting requests and responses go directly to the delegate's Inbox.


<u>With this permission</u>	<u>As a delegate, you can</u>
Author	Read and create items, and modify and delete items you create. For example, a delegate can create task requests and meeting requests directly in the manager's Task or Calendar folder, and then send either item on the manager's behalf.
Custom	Perform activities defined by the manager.
Editor	Read and create items, and modify and delete any item. For example, a delegate can reply to messages, task requests, and meeting requests for the manager.
None	No permission. Cannot open the folder.
Reviewer	Read items only. For example, read messages in another person's Inbox.

### The Delegates tab is not available.

- You must be connected to the server.
- The add-in that contains the Delegate Access feature must be set up. You can check to see whether the **Delegate Access** check box is available. On the **Tools** menu, click **Options**. On the **General** tab, click **Advanced Options**, and then click **Add-In Manager**. If the **Delegate Access** check box is not available, you must set up the add-in. For information about how to set up an add-in, click .



## Set sharing permissions for a folder

- 1 If the Folder List is not visible, click the **View** menu, click **Folder List**, and then select the folder you want to share with another person.
- 2 Right-click the folder you want to share, and then click **Properties** on the shortcut menu.
- 3 Click the **Permissions** tab.
- 4 Click **Add**.
- 5 In the **Type name or select from list** box, type or select the name of the person you want to grant sharing permissions to.
- 6 Click **Add**, and then click **OK**.
- 7 In the **Name** box, click the name of the person you just added.
- 8 In the **Roles** box, click the permissions you want.

For Help on an option, click the question mark , and then click the option.

**Tip** To set permissions for all your Outlook folders simultaneously, use the options on the **Delegates** tab (on the **Tools** menu, click **Options**).

### Notes

- For information about how to use public folders to share information, click .
- To share a folder in a personal folder file (.pst), import the folder. For more information, click .

## View another person's Calendar

- 1 On the **File** menu, point to **Open**, and then click **Other User's Folder**.
- 2 In the **Name** box, type the name of the person who granted you delegate access permission or click **Name** to select from a list.
- 3 In the **Folder** box, click **Calendar**.


### Tips

- To always have quick access to the Calendars you use often, add shortcuts to other people's Calendars to your Outlook Bar. Right-click the background of the Outlook Bar, and then click **Add to Outlook Bar** on the shortcut menu. (You must have reviewer permission to gain access to other people's mailboxes, and you must have added their mailboxes to your user profile.)

How? 


- If you manage the Calendars of several people, you can create a new group on the Outlook Bar and store shortcuts to their Calendars there. Right-click the background of the Outlook Bar, and then click **Add New Group** on the shortcut menu. Drag the Calendar shortcuts you created into this new group.
- You can have Outlook automatically open another person's Calendar (or any Outlook folder) when you start Outlook. Just leave the folder window open when you quit Outlook.
- If you have author or editor permission, any items the delegate creates while the shared Calendar is active are stored in the other person's Calendar.

## Send a mail message with both the delegate's and manager's names





- 1 On the **File** menu, point to **New**, and then click **Mail Message**.
- 2 On the **View** menu, click **From**.
- 3 In the **From** box, type the name of the person you are sending the message on behalf of or click **From** to select from a list.
- 4 In the **To**, **Cc**, and **Bcc** boxes, enter recipient names.
- 5 In the **Subject** box, type the subject of the message.
- 6 In the text box, type the body of the message.
- 7 Click **Send** .

## Give permission to others to access my folders


You can give someone sharing permission to open and read the contents of your folders by selecting the reviewer permission when you share a folder. (For the Outlook Inbox folder, reviewer permission lets the other person delete your mail as well.) In addition, for Outlook, you can give another person sharing permission to schedule appointments and meetings for you in Calendar and to create and modify tasks for you in Tasks, depending on the permission level you specify for the person.

For Outlook folders only, you can also choose to give someone delegate access. For more information about delegate access, click .





### What do you want to do?

-  [Set sharing permissions for a folder](#)
-  [Set sharing permissions for a delegate](#)
-  [Send meeting requests and responses only to my delegate, not to me](#)
-  [Change sharing permissions for a delegate](#)

## Open and manage another person's folders

If a colleague or manager lets you know that they have given you access to share one of their folders, or if you receive a mail message that says you have been granted delegate access to share a folder, you can open the shared folder and perform certain activities, depending on the folder that is shared, the permission level you have been given, and the method your colleague or manager used to share the folder with you (whether by sharing or by sharing with you as a delegate). For more information about delegate access, click .

### What do you want to do?

-  [Open another person's folder](#)
-  [Manage appointments and meetings in another person's Calendar](#)
-  [Manage tasks in another person's task list](#)
-  [Manage e-mail messages in another person's Inbox](#)

## **Manage appointments and meetings in another person's Calendar**

If a colleague or manager lets you know that they have given you access to share their Calendar, you can open the shared Calendar and read their schedule. You can also schedule appointments and meetings for your colleague or manager.

If you receive a mail message that says you have been given delegate access permission to share a Calendar, you can send and accept meeting requests for your colleague or manager in addition to the activities listed above.

### **What do you want to do?**

- [Schedule an appointment for another person](#)
- [Schedule a meeting on behalf of another person](#)
- [Accept meeting requests for another person as a delegate](#)
- [View another person's Calendar](#)

## Manage tasks in another person's task list


If a colleague or manager lets you know that they have given you access to share their Tasks folder, you can open the shared task list and read their tasks. You can also create and modify tasks for your colleague or manager.

If you receive a mail message that says you have been given delegate access permission to share a Tasks folder—and you have been granted editor permission—you can send task requests and respond to task requests for your colleague or manager in addition to the activities listed above. **What do you want to do?**



- » Create a task in another person's Tasks folder
- » Create a task request as a delegate
- » Respond to a task request as a delegate
- » Change the order of tasks as a delegate



## Manage e-mail messages in another person's Inbox

If a colleague or manager lets you know that they have given you access to their Inbox—and you have been granted editor permission—you can open the shared Inbox, read their mail messages, and delete unwanted mail for your colleague or manager. (The deleted items are stored in your Deleted Items folder). For more information about managing e-mail messages in another person's Inbox, click .

### What do you want to do?

-  Send an e-mail message with both the delegate's and manager's names
-  Reply to an e-mail message in the manager's Inbox on behalf of the manager

## About managing e-mail messages in another person's Inbox

If you receive a mail message that says you have been given delegate access permission to share a manager or colleague's Inbox, you have send-on-behalf-of permission. This permission level allows you to send messages and meeting requests on behalf of your colleague or manager, by adding the **From** box to meeting requests and messages, in addition to opening the shared Inbox, reading mail messages, and deleting unwanted mail for your colleague or manager. Messages can be sent from your Inbox. And messages sent on behalf of another person contain both the manager's name and the delegate's name. Message recipients see the person's name who granted permission in the **Sent On Behalf Of** box and the delegate's name in the **From** box.

With author or editor permission, a delegate can send messages that appear to be composed and sent directly by the person the delegate sends the message on behalf of. Replies are sent to the delegate and not to the person who granted permission. Sent mail is saved in the Sent Items folder of the delegate, and message tracking notifications are sent to the delegate. If the delegate has Outlook automatically record journal entries for particular items, and a sent-on-behalf-of item is one that will be automatically recorded, it is recorded in the Journal of the delegate.


Return to [Manage e-mail messages in another person's Inbox](#)

## How do I change the order of tasks in a task list as a delegate?

If you want to move tasks up or down in a Tasks folder you have delegate access to, the person who granted you delegate access must also give you owner permission for that folder. To give you owner permission, the person who granted you permission should do the following: Right-click the **Tasks** folder, and then click **Properties** on the shortcut menu. Click the **Permissions** tab, and then in the **Name** box, click the name of the delegate. Then click **Owner** in the **Roles** box.






## Outlook features available when you use Microsoft Exchange Server

For a visual overview of Outlook features that are available when you use Microsoft Exchange Server, click .

<b>Feature</b>	<b>Use to</b>
Message Recall	Recall unread messages from the recipients, and, if you want, replace the recalled message with a new message.
Message tracking	Track exactly when a message is received or opened by recipients. Consolidate all delivery, read, recall, and voting notifications in the original message.
Remote Mail	Work with e-mail messages remotely, and connect to an online service to select only messages you want to download, so you don't spend time or waste disk space on messages you don't need right away.
Voting	Request and tally responses to a multiple-choice question you send in a message. Consolidate voting notifications in the original message.
Offline folders and offline Address Book	When you work offline, synchronize your folders and Address Book at a remote location with folders on a Microsoft Exchange Server computer, so you always have the latest information.
Delegate Access and folder permissions	Give another person delegate access permission to work in your Outlook folders and send messages on your behalf. Or, assign a colleague permission to read, modify, or create items in your public and private folders on Microsoft Exchange Server.
Group scheduling	Schedule a meeting and reserve a location and equipment. See the free/busy times for meeting invitees and resources.
Public folders	Collect, organize, and share files and Outlook items with others on your team or across your organization. Participate in public, online discussions with others. Or, share a contact or task list with a group.
Organize Web pages in a public folder	Collect Web pages for a group to share, and keep track of how often pages are used, when they are updated, who owns the pages, and more.


## Send messages

In most cases, messages are sent automatically when you click **Send** . However, there are several ways to send messages, based on how Outlook is set up. When you check for new messages, Outlook checks for messages sent to you and delivers messages you want sent to others. Try one of the following from your Inbox, based on your particular setup:



- On the **Tools** menu, point to **Send and Receive**, and then click the information services you want to send and receive from.
- For information about how to use offline folders to send messages, click .
- For information about how to use Remote Mail to send messages, click .

## Check for new messages

In most cases, messages are received automatically and appear in the Inbox. However, there are several ways to check for new messages based on how Outlook is set up. When you check for new messages, Outlook checks for messages sent to you and delivers messages you want sent to others. Try one of the following from your Inbox, based on your particular setup:

- On the **Tools** menu, point to **Send and Receive**, and then click the [information services](#) you want to send and receive from.
- If you use offline folders, click the **Tools** menu, point to **Synchronize**, and then click **This Folder**.
- For information about how to use Remote Mail to check for new messages, click .

## Ask others to vote in a message

- 1 In the message, click **Options** .
- 2 Select the **Use voting buttons** check box, and then click the voting button names you want to use in the box.  
To create your own voting button names, delete the default button names, and then type any text you want. Separate the text with semicolons. For example: Small;Large;Extra Large.
- 3 Select the **Save sent message to** check box. To select a folder other than the Sent Items folder, click **Browse**.
- 4 Click **Close**, and then click **Send** .



## View vote responses to a message

- 1 Open the original message with the vote in it. This message is usually located in the Sent Items folder.
- 2 Click the **Tracking** tab.

**Note** By default, responses that do not contain comments are recorded in the original message, and the responses are kept in the Inbox. For information about how to automatically delete the response messages, click



## Copy the results of voting responses

1 View the voting responses.

 How?

2 Select the responses you want to copy.

To select all rows, click the first row, and then hold down SHIFT and click the last row.

To select nonadjacent rows, click the first row, and then hold down CTRL and click additional rows.

3 On the **Edit** menu, click **Copy**.

4 Switch to the other program or to the text box of the item you want to copy the information to.

5 On the **Edit** menu, click **Paste**.

## Display or hide the From box in a message

- 1 Create a message.
- 2 On the **View** menu, click **From Field**.

## **Review tracking results**

- 1** In the Sent Items folder, open the original message you are tracking.
- 2** Click the **Tracking** tab, and then view the results.

## Track when messages are delivered or read

You can track when messages you send are delivered or read by recipients. You receive a notification as each message is delivered or read. The contents of the notification are then automatically recorded on the **Tracking** tab of the original message. You can automatically delete message notifications in your [message list](#).

### What do you want to do?

- [Be notified when messages are delivered](#)
- [Be notified when messages are read](#)
- [Review tracking results](#)
- [Automatically delete notifications of delivered and read messages](#)

## Be notified when messages are delivered

- 1 On the **Tools** menu, click **Options**.
- 2 Click the **Preferences** tab.
- 3 Click **E-mail Options**, and then click **Tracking Options**.
- 4 Select the **Tell me when all messages have been delivered** check box.

**Note** To be notified about a single message, click **Options**  in the message, and then select the **Tell me when this message has been delivered** check box.

## Be notified when sent messages are read

- 1 On the **Tools** menu, click **Options**.
- 2 Click the **Preferences** tab.
- 3 Click **E-mail Options**, and then click **Tracking Options**.
- 4 Select the **Tell me when all messages have been read** check box.

**Note** To be notified about a single message, click **Options**  in the message, and then select the **Tell me when this message has been read** check box.

## Recall or replace a message you've already sent

You can recall or replace only those messages you sent to recipients who are logged on and using Outlook and who have not read the message or moved the message out of their Inboxes.

- 1** If the Folder List is not visible, click the **View** menu, and then click **Folder List**.
- 2** Click **Sent Items**.
- 3** Open the message you want to recall or replace.
- 4** On the **Actions** menu, click **Recall This Message**.
- 5** To recall the message, click **Delete unread copies of this message**.  
To replace the message with another, click **Delete unread copies and replace with a new message**, click **OK**, and then type a new message.
- 6** To be notified about the success of the recall or replacement for each recipient, select the **Tell me if recall succeeds or fails for each recipient** check box.

**Note** To replace a message, you must send a new one. If you do not send the new item, the original message is still recalled.




## **Automatically delete receipts and responses without comments**

- 1** On the **Tools** menu, click **Options**, and then click the **Preferences** tab.
- 2** Click **E-mail Options**, and then click **Tracking Options**.
- 3** Select the **Delete receipts and blank responses after processing** check box.













## Update rules on Microsoft Exchange Server

By default, rules that can be applied from Microsoft Exchange Server are updated on the server when you exit the Rules Wizard.

- 1 Click **Inbox** .
- 2 On the **Tools** menu, click **Rules Wizard**.
- 3 Click **Options**.
- 4 To have rules updated on the server automatically each time you close the Rules Wizard, click **Automatically**.

To update rules on the server manually whenever you want, click **Manually**, and then click **Update Now** each time you want to update rules. Rules that are not updated on the server have the words "client-only" added to the end of the rule name.

## Symbols in Microsoft Exchange Server

Symbol	Description
	Posted message.
	Message recall attempt.
	Notification of successful message recall.
	Notification of unsuccessful message recall.
	Notification of a delivered message.
	Notification of a read message.
	Notification of a message that was not delivered.
	Notification of a message that was not read.
	Remote Mail message header.
	Message marked for download.
	Message marked for copy and download.
	Conflict notification for offline folder item.

## **Automatically delete notifications of delivered and read messages**


- 1** On the **Tools** menu, click **Options**, click the **Preferences** tab, click **E-mail Options**, and then click **Advanced E-mail Options**.
- 2** Select the **Process delivery, read, and recall receipts on arrival** check box.

## Troubleshoot sending and receiving messages

### What do you need help with?


- » I can't send or receive e-mail messages.
- » I can't open a shared folder to see messages.
- » I can't see all of my messages.
- » Sending and receiving messages is slow. How can I speed it up?
- » My messages remain in my Outbox and are not sent.
- » When I try to use Remote Mail, I get an error message.
- » When I start Outlook, I am prompted for options I don't want.
- » I have problems sending and receiving e-mail messages over the Internet.

## I can't send or receive e-mail messages.

- The way you send and receive e-mail messages depends on how Outlook is set up. For information about how to send messages, click . For information about how to check for new messages, click



- If you use a modem, make sure dial-up networking options are set correctly. You must have a modem, a mail delivery service, and a phone line or a network cable connection to send and receive e-mail messages. For information, see Windows Help.





- The server you use may not be available. Wait and try again later, or see your administrator.
- You may have too many information services in your user profile set for sending and receiving e-mail messages. In most cases, you should have just one e-mail information service. See your administrator to find out which one to use. For information about how to add an information service, click . For information about how to remove an information service, click



### **I can't open a shared folder to see messages.**





- You may not have permission to open the folder. See the folder owner or your administrator.
- The server the shared folder is on may not be available. Wait and try again later, or see your administrator.
- If you are a delegate, you may not have permission. Ask the person who granted you delegate access to perform the following steps to verify the permissions granted to you: on the **Tools** menu, point to **Options**, and then click the **Delegates** tab. Click the delegate's name in the **Delegates** box, and then click **Permissions**.

## I can't see all of the items in a folder.

- You may have a filter on that hides some or all of the items in the folder. If there is a filter on the active folder, the words "Filter Applied" appear in the status bar. To remove a filter, click the **View** menu, point to **Current View**, click **Customize Current View**, click **Filter**, and then click **Clear All**.
- Grouped items might be collapsed. To expand groups to show details, click the expand button . To collapse groups to hide details, click the collapse button .
- The item might be in another folder. Check any appropriate folders. To see all the folders at once, click the **View** menu, and then click **Folder List**.
- You might have the folder set up to AutoArchive items after items reach a certain age. On the **Tools** menu, click **Options**, click the **Other** tab, and then click **AutoArchive**. If the **AutoArchive every** check box is selected, the item you want could have been archived.
- If you changed where messages are sent from and received, you might be looking in the wrong Inbox. To check where messages are sent from and received, click .
- If you work offline, the folder might not be set up for offline use or might not have been synchronized. For information about how to set up and use offline folders, click .
- If you have any rules set up, the message could have been automatically moved or deleted.





## **My messages remain in my Outbox and are not sent.**

- You may be using [mail delivery services](#) that conflict, so the message is using the wrong service. Specify only the service you need to deliver the message. For information about how to specify the service to use when you send and receive messages, click .
- If you use offline folders or Remote Mail, you must use different commands to send and receive messages. For information about how to send messages, click . For information about how to check for new messages, click .
- If you edit a message in the Outbox and then save changes, the message is not sent. Open the message, and then click **Send** . Messages waiting to be sent are formatted in italic in the Outbox.



## When I try to use Remote Mail, I get an error message.

- You might already be connected to your [mail delivery service](#). Quit Outlook, and then restart Outlook offline. For information about how to set Outlook to start offline, click [»](#).
- You could have offline folders set up on your computer. You can either use offline folders to connect remotely to the server or remove the offline folders and use Remote Mail and a [personal folder file](#). You cannot use both from the same user [profile](#). For information about how to use offline folders, click [»](#). For information about how to remove offline folders from your user profile, click [»](#).
- You may be trying to connect from a different location than the one set up. To check the settings for the location being used, start the Remote Connection Wizard, and, in the first step, select the **Confirm before connecting** check box. In a later step you can check the settings for your location. For information about how to start the Remote Connection Wizard, click [»](#).
- Remote Mail might not be set up properly on your computer. For information about how to set up Remote Mail, click [»](#).

## **Sending and receiving messages is slow. How can I speed it up?**

- If you use Remote Mail, you can screen messages by reviewing the message headers before you download the complete messages. For information about how to retrieve messages by using Remote Mail, click .
- If you use offline folders and typically synchronize all folders, try synchronizing just the folders you need. Also, because the Deleted Items folder is automatically updated, empty it before you synchronize. For information about how to stop the synchronization of an offline folder, click . To empty the Deleted Items folder automatically when you quit Outlook, click the **Tools** menu, click **Options**, click the **Other** tab, and then select the **Empty the Deleted Items folder upon exiting** check box.
- If you use WordMail as your e-mail editor, you should have at least 16 MB of memory available. To select which e-mail editor you use, click the **Tools** menu, click **Options**, and then click the **Mail Format** tab. Select an option in the **Send in this message format** box.

## **When I start Outlook, I am prompted for options I don't want.**

- If you are prompted to specify a user profile and want to use only one, you can set up one profile for use all the time. For information about how to set up a profile for ongoing use, click .
- If you are prompted to decide whether to connect to the server or work offline and always prefer one method over the other, you can set up one method for use all the time. For information about how to set up an online or offline connection for ongoing use, click .

## **I have problems sending and receiving e-mail messages over the Internet**

- If you receive an Internet e-mail message that was delayed, you can look at the list of transactions for the message over the Internet, such as the time the message arrived at each location on its route. Open the message you want to view the Internet headers for, click the **View** menu, and then click **Options**.
- If recipients of your messages over the Internet receive an attachment called WinMail.dat, you sent messages to them with Microsoft Exchange Rich Text format included, such as bold or italic text, but the recipients do not use a program that can read this format. To select what message format you use, click the **Tools** menu, click **Options**, and then click the **Mail Format** tab. Select an option in the **Send in this message format** box.

## Send a private folder shortcut in a message

1 Set sharing permissions for the folder you want to send a shortcut for.

 How?

2 Open the folder you just set sharing permissions for.

3 Create a message, but don't send it yet.

 How?

4 Drag the icon for the folder you just opened from the Folder Banner to the mail message button on the Windows taskbar, and then to the text box of the message.

5 Click **Send** .

**Note** The message recipient must use Outlook to use the private folder shortcut.

## Send pictures with messages from the Internet

This procedure is available only if you use HTML as your e-mail editor.


- 1 On the **Tools** menu, click **Options**, and then click the **Mail Format** tab.
- 2 To include pictures in a message, including any backgrounds, select the **Send pictures with messages** check box.  
To provide pointers to the pictures instead of including them, clear the **Send pictures with messages** check box.

### Notes

- Sending pictures can increase the size of a message, and slow down the sending and receiving of messages.
- You can turn this setting on and off for individual messages. In the message, click the **Format** menu, and then click **Send Web Pictures**.

## About add-ins supplied with Outlook

Add-ins are features—such as Net Folders and Import Converters—or components—such as third-party programs—that provide additional functionality in Outlook. Outlook supplies several add-ins that are installed automatically when you install Outlook. If, for any reason, one of these add-ins is removed, or if you want to use a third-party add-in, you can install it at any time.

Optional components other than add-ins are also available with Outlook. To see a list of components you can set up with Outlook, click .

<b>Add-in name</b>	<b>File name</b>	<b>Description</b>
cc:Mail Menu Extension	Ccmxp.ecf	Adds cc:Mail to the list of available information services you can use.
Delegate Access	Dlgsetp.ecf	Adds the <b>Delegates</b> tab to the Options dialog box (on the <b>Tools</b> menu).
Digital Security	Etexch.ecf	Adds the <b>Security</b> tab to the Options dialog box (on the <b>Tools</b> menu), which allows you to use the digital signature and message seal features.
Exchange Extensions	Emsuix.ecf	Adds the <b>Out of Office Assistant</b> and <b>Inbox Assistant</b> commands to the <b>Tools</b> menu.
Internet Mail	Minet.ecf	Adds an <b>Internet</b> tab to the Message Properties dialog box.
Mail 3.0 Extensions	Mail3.ecf	Enables extensions created for Microsoft Mail 3.0 in Outlook.
Microsoft Fax	Awfext.ecf	If previously set up, adds Microsoft At Work fax software to the list of available <a href="#">information services</a> you can use.
Microsoft Mail 3.x Menu Extensions	Msfsmenu.ecf	Enables menu extensions created for Microsoft Mail 3.x in Outlook.
Microsoft Mail 3.x Property Sheet Extensions	Msfspop.ecf	Enables dialog box extensions created for Microsoft Mail 3.x in Outlook.
Remote Exchange Extensions	Emsuix.ecf	Adds Remote Mail settings to the Windows Control Panel through the Mail icon.
Schedule+	Msspc.ecf	Provides Schedule+ compatibility.
The Microsoft Network	Msn.ecf	Adds The Microsoft Network to the list of available information services you can use.



## About using Internet Mail

Click a topic for more information.

### Introductory topics

- » [Use Internet e-mail](#)
- » [About Internet e-mail](#)
- » [Set up a new profile for an Internet e-mail account](#)
- » [Change the time interval to check the server for new e-mail messages](#)
- » [Add a new Internet e-mail account to an existing profile](#)
- » [Remove an Internet e-mail account from your profile](#)
- » [Troubleshoot Internet e-mail](#)


### Changing Internet e-mail account settings

- » [Change the name of an existing Internet e-mail server](#)
- » [Keep a copy of your Internet e-mail messages on a POP3 e-mail server](#)
- » [Specify a different Internet e-mail account password](#)
- » [Log on to your Internet e-mail account by using Secure Password Authentication](#)
- » [Change the way you connect to your Internet e-mail server](#)
- » [Change the Internet e-mail properties for a dial-up networking connection](#)
- » [Change the Internet e-mail server port numbers](#)
- » [Change the connection attempt time to your Internet e-mail server](#)





### Changing the format of Internet e-mail messages

- » [Change the Internet format used to send messages and attachments](#)
- » [Change the line length of message text](#)

## Use Internet e-mail

Outlook supports popular [Internet](#) standards for sending, receiving, and storing e-mail messages by using an Internet connection. For more information about Internet e-mail accounts, click .

### What do you want to do?

-  [Set up a new profile for an Internet e-mail account](#)
-  [Add a new Internet e-mail account to an existing profile](#)
-  [Remove an Internet e-mail account from your profile](#)
-  [Troubleshoot Internet e-mail](#)

## About Internet e-mail accounts

If you have an existing Internet e-mail account that you already use with Outlook, you can continue to use it without making any changes. If you are switching to Outlook from another program, or if you have a new Internet e-mail account that you will use for the first time, you have the following options:

- Set up a new profile for an Internet e-mail account if you have never used Outlook to send and receive e-mail messages, and if you have signed up for an Internet e-mail account through an Internet service provider.
- Add a new Internet e-mail account to an existing profile if you already use Outlook to send and receive e-mail messages, or if you want to have messages from more than one e-mail account delivered to your Inbox folder.
- Remove an Internet e-mail account from your profile if you don't intend to use it again, for example, if you have more than one e-mail account in your profile and you cancel one of the accounts.
- Troubleshoot Internet e-mail if you have problems getting Internet e-mail to work with Outlook.

For more information about using Internet e-mail with Outlook, click .


Return to [Use Internet e-mail](#)

## About Internet e-mail


With Outlook, the Internet Mail extension, and an [Internet](#) e-mail account with an [Internet service provider](#), you can exchange messages with anyone on the Internet. Messages you send are submitted to an e-mail server that supports the [SMTP](#) Internet standard, and then are delivered to the recipient. Messages you receive are stored in your e-mail account on an e-mail server that supports the [POP3](#) Internet standard. When you log on to your e-mail account and download your messages, they are stored in your [personal folder file](#) in your Inbox folder. You can connect to the Internet in the following ways:

- Over phone lines, by using a modem. You can manually establish a connection or you can use dial-up networking to automatically connect when you start Outlook. Your Internet service provider can supply you with the phone number, modem settings, and network protocols required.
- Through a local area network (LAN). Your organization might provide external access to the Internet from your computer through a LAN. Your system administrator can provide you with account information and network protocols to gain access to the e-mail servers.




Whether you use a modem or a LAN, in order to connect to the Internet, you will need to know the names of your incoming and outgoing e-mail servers (sometimes the same server is used for both incoming and outgoing messages), your account name, and your password. Your Internet service provider or system administrator can supply you with this information.

For more information about connecting to the Internet by using a modem or a LAN, click .

## Change the way you connect to your Internet e-mail server

You can connect to your Internet e-mail server either through a local area network (LAN), or through a dial-up networking connection, by using a modem. For more information about connecting to your Internet e-mail server, click .

### What do you want to do?

-  [Connect to your Internet e-mail server by using a LAN connection](#)
-  [Connect to your Internet e-mail server by using a modem](#)
-  [Connect to your Internet e-mail server manually](#)

## About connecting to your Internet e-mail server


There are two ways to connect to your Internet e-mail server:

- To connect to the Internet through a local area network (LAN), your organization must provide external access to the Internet through an Internet gateway or use an Internet Mail server that is already on a LAN.
- To connect to the Internet by using a modem, your Internet service provider will need to provide you with the phone number, modem settings, and required network protocols. To check for and deliver new messages by using a modem, click the **Tools** menu, point to **Send and Receive**, and then select the server you want to use. Your Internet e-mail server does not do this for you automatically.



When you connect to the Internet through a LAN, your Internet e-mail server automatically checks for and delivers new messages at preset time intervals. If you would rather prompt the server when you want your incoming and outgoing mail to be delivered, you can choose to connect to the server manually. For example, you might want to connect manually if you have a slow connection to your e-mail server using a dial-up networking connection, and you don't want to wait for the server to connect automatically.

Return to [Change the way you connect to your Internet e-mail server](#)

## Change the Internet format used to send messages and attachments

Microsoft Outlook provides two standard formats for sending messages and attachments over the Internet, the Multipurpose Internet Mail Extensions (MIME) format and the UNIX-to-UNIX encoding (UUENCODE) format. For more information about these formats, click .

### What do you want to do?

-  Use MIME format to send messages and attachments
-  Use UUENCODE format to send messages and attachments

## About the Internet formats you can use to send messages and attachments

There are two standard Internet formats you can use to send messages and attachments:

- Multipurpose Internet Mail Extensions (MIME). Use MIME format to send messages and attachments, or to send messages that use a character set other than ASCII. Most new Internet e-mail programs use MIME format.
- UNIX-to-UNIX encoding (UUENCODE). Use UUENCODE format if you know that the recipient's e-mail program doesn't support MIME (for example, if the recipient uses a text-based e-mail program on a UNIX system).

You can set Outlook to use either MIME or UUENCODE as the default format. If you need to make an exception, you can change the setting for an individual message.

### Notes

- If you send an attachment in MIME format to a group of recipients and some of the recipients use an e-mail program that doesn't support MIME, those recipients won't be able to open the attachment. Send a separate message in UUENCODE format with the attachment to those recipients.
- If you send Outlook-specific items to other Outlook users via the Internet, such as a meeting request or a message that includes voting options, these must be sent in rich-text format to work properly. Right-click the recipient's e-mail address, click **Properties** on the shortcut menu, and then select the **Always send to this recipient in Microsoft Outlook rich-text format** check box. Do this for each recipient to whom you are sending the item.

Return to [Change the Internet format used to send messages and attachments](#)



## **Add a new Internet e-mail account to an existing profile**

- 1** On the **Tools** menu, click **Services**.
- 2** Click **Add**.
- 3** In the **Available information services** box, click **Internet E-mail**, and then click **OK**.
- 4** On the **General** tab, type a name for your new Internet e-mail account, and then type your user information in the appropriate boxes.
- 5** Click the **Servers** tab, and then type your server information and logon information in the appropriate boxes.
- 6** Select any other options that you want on the **Connection** and **Advanced** tabs.

## Change the name of an existing Internet e-mail server

- 1 On the **Tools** menu, click **Services**.
- 2 In the **The following information services are set up in this profile** box, click **Internet E-mail - *mail account name***.  
If you have more than one Internet e-mail account, select the one that you want to modify.
- 3 Click **Properties**, and then click the **Servers** tab.
- 4 Under Server information, type the new server name in the appropriate box.

## Keep a copy of your messages on a POP3 server

- 1 On the **Tools** menu, click **Services**.
- 2 In the **The following information services are set up in this profile** box, click **Internet E-mail - *mail account name***.  
If you have more than one Internet e-mail account, select the one that you want to modify.
- 3 Click **Properties**, and then click the **Advanced** tab.
- 4 Select or clear the **Leave a copy of messages on server** check box.  
To have your messages deleted from the server after a specified number of days, select the **Remove from server after** check box, and then type a number of days in the box.

## **Specify a different Internet e-mail account password**

You need to follow these steps only if you are notified that your Internet e-mail account password has been changed.

- 1** On the **Tools** menu, click **Services**.
- 2** In the **The following information services are set up in this profile**, click **Internet E-mail - *mail account name***.  
If you have more than one Internet e-mail account, select the one that you want to modify.
- 3** Click **Properties**, and then click the **Servers** tab.
- 4** in the **Password** box, type your new password.

## **Log on to your Internet e-mail account by using Secure Password Authentication**

You need to follow these steps only if you are notified that you must log on to your Internet e-mail account by using Secure Password Authentication.

- 1** On the **Tools** menu, click **Services**.
- 2** In the **The following information services are set up in this profile** box, click **Internet E-mail - *mail account name***.  
If you have more than one Internet e-mail account, select the one that you want to modify.
- 3** Click **Properties**, and then click the **Servers** tab.
- 4** Click **Log on using Secure Password Authentication**.

## **Connect to your Internet e-mail server by using a LAN connection**

- 1** On the **Tools** menu, click **Services**.
- 2** In the **The following information services are set up in this profile** box, click **Internet E-mail - *mail account name***.  
If you have more than one Internet e-mail account, select the one that you want to modify.
- 3** Click **Properties**, and then click the **Connection** tab.
- 4** Click **Connect using my local area network (LAN)**.

## Connect to your Internet e-mail server by using a modem

- 1 On the **Tools** menu, click **Services**.
- 2 In the **The following information services are set up in this profile** box, click **Internet E-mail - *mail account name***.  
If you have more than one Internet e-mail account, select the one that you want to modify.
- 3 Click **Properties**, and then click the **Connection** tab.
- 4 Click **Connect using my phone line**.
- 5 In the **Use the following dial-up networking connection** box, click the appropriate connection from the list, or click **Add**.

**Note** To disconnect from your modem after you send and receive messages, click the **Tools** menu, click **Options**, click the **Internet E-mail** tab, and then select the **If using a dial-up connection hang up when finished sending and receiving mail** check box.

## **Connect to your Internet e-mail server manually**

- 1** On the **Tools** menu, click **Services**.
- 2** In the **The following information services are set up in this profile** box, click **Internet E-mail - *mail account name***.  
If you have more than one Internet e-mail account, select the one that you want to modify.
- 3** Click **Properties**, and then click the **Connection** tab.
- 4** Click **Connect using Internet Explorer's or a 3rd party dialer**.



## Change the Internet e-mail properties for a dial-up networking connection

- 1 On the **Tools** menu, click **Services**.
- 2 In the **The following information services are set up in this profile** box, click **Internet E-mail - *mail account name***.  
If you have more than one Internet e-mail account, select the one that you want to modify.
- 3 Click **Properties**, and then click the **Connection** tab.
- 4 Under Modem, click **Properties**.
- 5 Change the connection information as needed in the appropriate box.

## Change the Internet e-mail server port numbers

You need to follow these steps only if you are notified that your port numbers need to be changed.

- 1 On the **Tools** menu, click **Services**.
- 2 In the **The following information services are set up in this profile** box, click **Internet E-mail - *mail account name***.  
If you have more than one Internet e-mail account, select the one that you want to modify.
- 3 Click **Properties**, and then click the **Advanced** tab.
- 4 Under Server port numbers, change the port numbers as needed in the appropriate box.

## **Change the connection attempt time to your Internet e-mail server**


You can specify how long Outlook waits for a response from the server before it stops attempting to send or receive messages.

- 1** On the **Tools** menu, click **Services**.
- 2** In the **The following information services are set up in this profile** box, click **Internet E-mail - *mail account name***.

If you have more than one Internet e-mail account, select the one that you want to modify.

- 3** Click **Properties**, and then click the **Advanced** tab.
- 4** Under Server timeouts, change the time as needed.

## Set up a new profile for an Internet e-mail account

- 1 Click **Start**, point to **Settings**, and then click **Control Panel**.
- 2 Double-click the **Mail and Fax** icon .  
If fax services are not set up, the icon is named **Mail**.
- 3 On the **Services** tab, click **Show Profiles**.
- 4 Click **Add**.
- 5 On the first screen of the Inbox Setup Wizard, make sure **Internet E-mail** is the only information service selected in the list, and then click **Next**.
- 6 Type a descriptive name for the profile or accept the default name provided, and then click **Next**.
- 7 Click **Set Up Mail Account**, and then enter your account information.

## **Remove an Internet e-mail account from your profile**

- 1** On the **Tools** menu, click **Services**.
- 2** In the **The following information services are set up in this profile** box, click the Internet e-mail account that you want to remove, and then click **Remove**.

## **Use MIME format to send messages and attachments**

- 1** On the **Tools** menu, click **Options**, and then click the **Internet E-mail** tab.
- 2** Select **MIME**.
- 3** To specify that non-U.S. character sets, high ASCII, or double-byte character sets can be used in the header without encoding, select the **Allow 8-bit characters in headers** check box.

## **Use UUENCODE format to send messages and attachments**

- 1** On the **Tools** menu, click **Options**, and then click the **Internet E-mail** tab.
- 2** Select **UUENCODE**.

## **Change the time interval to check the server for new e-mail**

- 1** On the **Tools** menu, click **Options**, and then click the **Internet E-mail** tab.
- 2** Select the **Check my local network connection(s) for new mail every** check box, and then type a number of minutes in the box.



## **Change the line length of message text**


- 1** On the **Tools** menu, click **Options**, and then click the **Internet E-mail** tab.
- 2** Select the **When sending messages, wrap text at** check box, and then type a number in the box.

## Troubleshoot Internet e-mail

### What do you need help with?


- » [Why did I receive an "Undeliverable" message notification from the System Administrator?](#)
- » [Why can't the message recipient open my attachment?](#)
- » [Why is a message still on the Internet e-mail server after I delete the message?](#)
- » [Why isn't a message on the Internet e-mail server when I set the option to keep a copy on the server?](#)
- » [Common problems with Internet connections](#)
- » [Troubleshoot sending and receiving messages](#)

## **Why did I receive an "Undeliverable" message notification from the System Administrator?**

To successfully send a message by using an Internet e-mail account, the Internet e-mail server must be available. The server might be busy or offline temporarily, or the server name might not be entered correctly in your user profile. For more information about how to enter a server name, click . If you aren't sure that you have the correct server name, contact your Internet service provider.

When you know the Internet e-mail server is available, resend the message. Open the "Undeliverable" message in your Inbox. On the **Actions** menu, click **Resend This Message**. Then on the **File** menu in the message, click **Send**.

## Why can't the message recipient open my attachment?

You may have sent the message in MIME format to a recipient whose e-mail program doesn't support MIME format. Use the UUENCODE format to send the attachment again. For more information about how to change the Internet format for the current message, click .

Or you may have sent the message using rich-text format. Open the message in your Sent Items folder. On the **Actions** menu, click **Resend This Message**. Right-click the recipient's e-mail address, click **Properties** on the shortcut menu, and then clear the **Always send to this recipient in Microsoft Outlook rich-text format** check box. On the **File** menu in the message, click **Send**.

## **Why is a message still on the Internet e-mail server after I deleted the message?**


You may have set an option to keep a copy of your messages on the [POP3](#) Internet e-mail server. If you delete a message that was delivered to your [personal folder file](#), the copy stored on the Internet e-mail server is not affected. For more information about changing this setting, click [?](#).

**Why isn't a message on the Internet e-mail server when I set the option to keep a copy on the server?**

You may have set an option to delete copies of your messages from the POP3 Internet e-mail server after a specified number of days. When you set this option, messages left on the Internet e-mail server are removed after five days unless you specify otherwise. You may still have a copy of the message if you didn't delete the message when it was delivered to your personal folder file.

## Common problems with Internet connections

If you cannot connect to the Internet, try the following solutions:

- Most Internet addresses and connection settings are case-sensitive. Make sure settings are capitalized correctly. For information about checking mail server settings, click .
- Make sure your user profile does not include more than one information service that requires a modem connection. For example, Internet and fax services in the same profile might cause modem conflicts in Outlook.
- Establish your Internet connection, and then start Outlook. If you receive an error when you try to send or receive messages, confirm all of your Internet e-mail account settings with your Internet service provider. You may have entered a (DNS) server address or a news server address instead of the e-mail server address.

## Check your mail server settings


- 1 On the **Tools** menu, click **Services**.
- 2 In the **The following information services are set up in this profile** box, click **Internet E-mail - *mail account name***.  
If you have more than one Internet e-mail account, select the one that you want to modify.
- 3 Click **Properties**.
- 4 On the **Servers**, **Connection**, and **Advanced** tabs, check the settings against those given to you by your Internet service provider (ISP).  
If everything matches, contact your ISP to verify that you have the correct settings and that their servers are operating correctly. Also, make sure your ISP server supports SMTP, and POP3 protocols.





## **Automatically reply to incoming messages while out of the office**

- 1** On the **Tools** menu, click **Out of Office Assistant**.
- 2** Click **I am currently Out of the Office**.
- 3** In the **AutoReply only once to each sender with the following text** box, type the message you want to send to others while you are out.

For information about how to use [rules](#) with the Out of Office Assistant, click .


## Use rules in Out of Office Assistant and Inbox Assistant

To use any of the following procedures you must have the Inbox Assistant [add-in](#) installed. For information about how to install an add-in, click [»](#).

### What do you want to do?

- [» Create a rule with Out of Office Assistant or Inbox Assistant](#)
- [» Delete a rule with Out of Office Assistant or Inbox Assistant](#)
- [» Edit a rule with Out of Office Assistant or Inbox Assistant](#)
- [» Change the order in which rules are applied for Out of Office Assistant or Inbox Assistant](#)
- [» Turn a rule on or off for Out of Office Assistant or Inbox Assistant](#)
- [» Find out how rules are applied to Out of Office Assistant or Inbox Assistant](#)
- [» Troubleshoot Out of Office Assistant and Inbox Assistant rules](#)

## Create a rule with Out of Office Assistant or Inbox Assistant

- 1** To create an out of office rule, on the **Tools** menu, click **Out of Office Assistant**.  
To create an Inbox rule, on the **Tools** menu, click **Inbox Assistant**.
  - 2** Click **Add Rule**.
  - 3** Under When a message arrives that meets the following conditions, specify the conditions of the rule that the message must meet for the action to occur.  
For information about how rules are applied, click .
  - 4** To specify that this rule should be the last one applied, select the **Do not process subsequent rules** check box.  
For Help on an option, click **Help**.
  - 5** To specify more conditions, click **Advanced**, select the options you want, and then click **OK**.
  - 6** Under Perform these actions, select the options you want. You can select multiple options.
- Note** If you specify that a message should be deleted, rules that follow the delete rule do not affect the message.

## **Delete a rule with Out of Office Assistant or Inbox Assistant**

- 1** To delete an out of office rule, on the **Tools** menu, click **Out of Office Assistant**.  
To delete an Inbox rule, on the **Tools** menu, click **Inbox Assistant**.
- 2** In the **Status** box, click the rule you want to delete.
- 3** Click **Delete Rule**.

## **Edit a rule with Out of Office Assistant or Inbox Assistant**

- 1** To edit an out of office rule, on the **Tools** menu, click **Out of Office Assistant**.  
To edit an Inbox rule, on the **Tools** menu, click **Inbox Assistant**.
- 2** In the **Status** box, select the rule you want to edit.
- 3** Click **Edit Rule**.
- 4** Make changes to the conditions and actions for the rule.  
For Help on an option, click **Help**.

## **Change the order in which rules are applied for Out of Office Assistant or Inbox Assistant**

- 1** To change the order of out of office rules, on the **Tools** menu, click **Out of Office Assistant**.  
To change the order of Inbox rules, on the **Tools** menu, click **Inbox Assistant**.
- 2** In the **Status** box, click the rule you want to move up or down in the list.
- 3** Click **Move Up** or **Move Down**.

## Turn a rule on or off for Out of Office Assistant or Inbox Assistant

- 1** To turn out of office rules on or off, on the **Tools** menu, click **Out of Office Assistant**.  
To turn Inbox rules on or off, on the **Tools** menu, click **Inbox Assistant**.
- 2** In the **Status** box, select or clear the check box next to the rule you want to turn on or off.



## Find out how rules are applied to Out of Office Assistant or Inbox Assistant

Rules are applied in the order they appear from top to bottom in the list of rules in the Out of Office Assistant and Inbox Assistant dialog boxes.

If you select more than one condition in the Edit Rule dialog box, only messages that meet all of the conditions have the rule applied to them. For example, if you specify Laura Callahan as the sender (condition) and "Marketing Meeting" (condition) in the **Subject** box, the rule applies only to messages that meet both conditions.

However, if you use one condition to set multiple criteria, messages that meet one of the multiple criteria within that condition are found. For example, if you specify "Laura Callahan;Nancy Davolio" in the **From** box, the rule applies to messages from either Laura Callahan or Nancy Davolio.

To specify that a rule should be the last one applied, select the **Do not process subsequent rules** check box (in the Add Rule or Edit Rule dialog box).

## Troubleshoot Out of Office Assistant and Inbox Assistant rules


What do you need help with?

- Out of Office Assistant and Inbox Assistant commands are not available
- One of my rules has a red X next to it

### **One of my rules has a red X next to it.**

When an action specified for a rule cannot be performed, an error dialog box appears, and an X appears next to the rule in the Inbox Assistant dialog box or the Out of Office Assistant dialog box. The error message explains what needs to be done to correct the error. To fix the error, click **Edit Rule**, and then make any necessary changes.

**Out of Office Assistant and Inbox Assistant commands are not available.**

- The add-in that contains the Inbox Assistant and Out of Office Assistant features may not be installed. For information about how to install an add-in, click .
- If you are not connected to the server, the **Inbox Assistant** and **Out of Office Assistant** commands (on the **Tools** menu) are unavailable.



## Start a new Office file from a public folder

Start a new Office file from a public folder, and then post the file to share it with others in a group—whether you just need to distribute the information or you also need to collect feedback from others. To post an Office file to a public folder, you must use Microsoft Exchange Server, and you must have permission to create items in that folder.

1 Open the public folder that contains the messages that you want to start a new Office file in.

 How?

2 On the **File** menu, point to **New**, and then click **Office Document**.


3 Double-click the icon for the type of file you want to start.

4 To post the file in the active public folder, click **Post the document in this folder**.

To send the document to someone, click **Send the document to someone**, and then enter the name of the person you want to send the Office document to in the **To** box.

## Post an Office file to a Microsoft Exchange folder

- 1 Start the Office program that you want to use to post the file.
- 2 Open or create the file you want to post.
- 3 On the **File** menu, point to **Send To**, and then click **Exchange Folder**.
- 4 In the folder list, double-click the folder you want to post the file to.

**Tip** For information about how to start a new Office file from a public folder, click .


**When I search for items in a public folder, I receive an error message.**

When you search for items in a public folder, you can only search one folder at a time. Subfolders and all other folders must be searched separately.



**When I try to select a contacts folder in the Address Book dialog box, I get an error.**

The contacts folder may have been deleted if you use an e-mail program other than Outlook (such as Microsoft Exchange Client). Or, if the contacts folder is shared, you may no longer have permission to use it.

If you no longer have permission to use the contacts folder, ask the owner of the folder if you can have permission to use the folder, and then set up the folder in the Address Book again. For information about how to set up a contacts folder in the Address Book, click .

If you determine that the contacts folder does not exist or that you cannot get permission to use it, you can remove the folder from the Address Book. On the **Tools** menu, click **Services**; click the **Services** tab, click **Outlook Address Book**, and then click **Properties**. Click the name of the folder you want to remove, and then click **Remove Address Book**.


## Compare Delegate Access, shared private folders, and public folders

You must use Microsoft Exchange Server to use the Delegate Access feature and public folders, and to share your private Outlook folders. The private folders must be stored in the Microsoft Exchange Server mailbox, not in a personal folder file.

With Outlook, you can share items and files in the following ways: you can give individuals permission to see your private folders, make an individual your delegate, and use public folders to make information available to large groups.


<b>Use this</b>	<b>To do this</b>	<b>Examples</b>
Shared private folders	Give one or more persons permission to read, modify, create, or delete information in your private folders.	You want a colleague to see your task list. You want your manager to see your schedule.
Delegate Access	Give someone permission to send messages on your behalf, accept meeting and task requests for you, or manage information in your private folders.	You have an assistant who helps you manage your e-mail messages and your schedule while you are out of the office.
Public folders	Share information with a workgroup, department, or company.	Your workgroup wants to share a task list or post and respond to ideas online in a public forum. Your company wants a calendar where everyone can see the latest holidays and company events.

## Why does my message appear gray or with a line through it?

When a message expires, it appears in the message list with gray text or with strikethrough marks. If the message is in a Microsoft Exchange Server mailbox, the message is deleted when the administrator cleans up expired messages. You can have expired messages deleted automatically when you archive. For more information, click .

## Where is the Inbox Assistant that I used with Microsoft Exchange Client?

The Inbox Assistant is replaced by the Rules Wizard in Outlook, but your administrator may still make the Inbox Assistant available. Rules created using the Inbox Assistant can be used in Outlook. You are asked to convert all active rules when you first start the Rules Wizard. You can still use the Inbox Assistant to manage your Inbox Assistant rules, but you cannot use the Inbox Assistant to edit rules created with the Rules Wizard.

To use the Inbox Assistant, unload the Rules Wizard [add-in](#) and load the Exchange Extensions add-in. For information about how to load and unload add-ins, click . For information about how to use the Inbox Assistant, click



## **Some of my Inbox Assistant rules were not converted. How do I convert them?**

If there was not enough room on the Microsoft Exchange Server, then some of your rules may not have been converted. To make more room, unload the Rules Wizard, delete any inactive rules, and then reload the wizard. Outlook will try to convert the rest of the rules.

### **Unload the Rules Wizard add-in**

- 1** On the **Tools** menu, click **Options**.
- 2** Click the **Other** tab.
- 3** Click **Advanced Options**, and then click **Add-In Manager**.
- 4** Clear the **Rules Wizard** check box.

### **Delete the inactive rules with the Inbox Assistant**

- 1** On the **Tools** menu, click **Inbox Assistant**.
- 2** In the **Status** box, click the rule you want to delete. Inactive rules have a cleared check box next to them.
- 3** Click **Delete Rule**.

### **Reload the Rules Wizard add-in**

- 1** On the **Tools** menu, click **Options**.
- 2** Click the **Other** tab.
- 3** Click **Advanced Options**, and then click **Add-In Manager**.
- 4** Select the **Rules Wizard** check box.

## About Microsoft Exchange Server and the Rules Wizard

### Rules on Microsoft Exchange Server

If you use Microsoft Exchange Server, rules can also be applied even if you do not have Outlook running. The rules must be set to be applied "when you receive them in the Inbox" on the server, and the rules must be able to be completed on the server. For example, a rule cannot be applied on the server if the action requires moving a message to a folder in a personal folder file. If a rule cannot be applied on the server, it is applied when you start Outlook.


By default, Outlook tries to update all of the rules on the server that you create. Rules that cannot be updated have the words "client only" added to the end of the name. If your list of rules contains rules that have been updated on the server as well as those that cannot be updated, the rules on the server are applied first, and then all of the other rules are applied.

You can have Outlook automatically update each rule on the server, or you can manually update rules.

### Offline folders and Remote Mail

If you use an offline folder (.ost) file or Remote Mail, "client only" rules are not applied when you synchronize offline folders or connect to your mail server and transfer mail. You must connect directly to Microsoft Exchange Server before the rules are applied.


### Out of Office Assistant


You can use the Out of Office Assistant to manage e-mail messages when you are out of the office. For information about how to set up an automatic response to incoming messages, click .

### Delivery receipts, voting responses, and out-of-office notices

The Rules Wizard treats delivery receipts, voting responses, and out-of-office notices as messages. So you can, for example, create a rule that moves items with the word "Meeting" in the **Subject** box. Delivery receipts, voting responses, and out-of-office messages that meet the criteria are moved. If a voting response is moved out of the Inbox, the response is not tracked in the original message.

## Add a shortcut to the Outlook Bar to open someone else's Calendar

You both need to be using Microsoft Exchange Server to store your mailboxes, and you need permission to see the other person's Calendar and main mailbox. For information about how to set permissions on a folder, click .

- 1 Click **Inbox** .
- 2 On the **Tools** menu, click **Services**.
- 3 Click **Microsoft Exchange Server**, and then click **Properties**.
- 4 Click the **Advanced** tab, and then click **Add**.
- 5 Type the other person's name in the **Add mailbox** box.
- 6 Click **OK** until all dialog boxes are closed.
- 7 If the folder list is not visible, click the **View** menu, and then click **Folder List**.
- 8 Expand the other person's mailbox so that the Calendar folder appears.
- 9 Drag the Calendar folder to the Outlook Bar.

## Copy a folder design

Folder design properties include permissions, rules, description, forms, and views.

- 1 On the **View** menu, click **Folder List**.
- 2 Click the folder you want to copy a design to.
- 3 On the **File** menu, point to **Folder**, and then click **Copy Folder Design**.
- 4 In the **Copy design from this folder** box, select the folder you want to copy the design from.
- 5 Under Copy design of, click the properties you want to copy.

## **Set security level for attachments**

- 1** On the **Tools** menu, click **Options**.
- 2** Click the **Security** tab, and then click **Attachment Security**.
- 3** Select the security method you want.



## Recover deleted items or folders

1 Click **Deleted Items**



2 On the **Tools** menu, click **Recover Deleted Items**.

3 Select the item or folder you want to retrieve from those displayed, and then click **Recover Selected Items**.

### Notes

- Some items or folders may not be recoverable because the length of time that deleted items are stored on the server is set by your administrator. For public folders, expiration dates take precedence over the length of time set by your administrator. Administrators will also need to have enabled this feature on Microsoft Exchange Server version 5.5.
- If you work primarily with offline folders, you need to log on to your mailbox on the server to retrieve deleted items.
- To have enabled this feature, you must have performed a Typical or Custom Setup and have selected **Deleted Item Recovery Extension** in the **Microsoft Exchange Server Support** option.

## Automatically display an unrecognized form in HTML format

- 1 On the **Tools** menu, click **Options**.
- 2 Click the **Other** tab.
- 3 Click **Advanced Options**, and then click **Custom Forms**.
- 4 Click **Web Services**.
- 5 Select the **Use Outlook Web Access to open messages not understood by Outlook client** check box to automatically open and display unrecognized forms in HTML format.
- 6 In the **Web Services Location** box, type the path to your Web server.
- 7 Select the **Prompt user before opening each form** check box to be notified before each form is opened.
- 8 To add a command on the **Actions** menu linking to a library of HTML forms, select the **Activate Web Forms link on Actions menu** check box, and then type the path to your server in the **Directory Page location** box.

## **Add a link to a library of HTML forms stored on a Web page**

- 1** On the **Tools** menu, click **Options**.
- 2** Click the **Other** tab.
- 3** Click **Advanced Options**, and then click **Custom Forms**.
- 4** Click **Web Services**.
- 5** Select the **Activate Web Forms link on Actions menu** check box .
- 6** In the **Directory Page location** box, type the path to your server.

**Note** For this procedure to work, your Exchange administrator must have previously created a Web page library of HTML forms.

## About Web Services

If you have set up Web Services, when you receive a form that Outlook does not recognize, your default browser is automatically started and the form appears in HTML format, provided [Outlook Web Access](#) is set up and enabled on your Exchange Server. In addition, you can add a new command, **Web Form**, to your **Actions** menu, creating a link to a Web site of available HTML forms, if your Administrator has created this Web page. When you click this command, your browser automatically opens the specified Web page, where you can create new Web forms and open existing forms.

## Set up where and how e-mail messages are delivered

Based on your situation, there are different ways to configure Outlook to send and receive e-mail messages. You can set the location you send and receive messages from, as well as the method you use. For more information about available e-mail locations and methods, click [»](#).

If you work for an organization, check with your administrator to see which solution is best for you. For information about common scenarios you can use as a guide, click [»](#).

### What do you want to do?

- [» Set up a Microsoft Exchange Server mailbox](#)
- [» Set up offline folders](#)
- [» Set up Remote Mail](#)
- [» Compare using Remote Mail and offline folders](#)

## About common scenarios for sending and receiving e-mail messages

Here are some common scenarios for sending and receiving e-mail messages, with locations and possible methods.


<b>Scenario</b>	<b>Location you send and receive messages from</b>	<b>Method you use to send and receive messages</b>
If you work in an organization and use Microsoft Exchange Server.	Microsoft Exchange Server mailbox	Automatic.
If you work in an organization and use Microsoft Exchange Server, and especially if you have a laptop computer or a docking computer you use on the road.	Offline folder (.ost) file	Offline folders. Automatic when connected. Use the <b>Synchronize</b> command (on the <b>Tools</b> menu) when not connected.
If you use only a mail delivery service such as The Microsoft Network or AOL.	Personal folder (.pst) file	Remote Mail. Use the <b>Remote Mail</b> command (on the <b>Tools</b> menu) to download just message headers or entire messages.



Return to [Set up where and how e-mail messages are delivered](#)

## About available e-mail locations and methods

**Locations** you can send and receive e-mail messages from:

- A Microsoft Exchange Server mailbox. The mailbox is located on a server maintained by your administrator and requires minimal maintenance from you. When your mailbox is on a server, you save space on your computer, but your messages are not available if the network or mail delivery service is down.
- An offline folder (.ost) file. This file is located on your computer hard disk, and the contents are synchronized to stay the same as the contents of the Microsoft Exchange Server mailbox. Offline folders are available even if the network or mail delivery service is down and can be compacted to save space on your computer.
- A personal folder (.pst) file. This file is usually located on your computer hard disk. This file takes up space on your computer, is available even when the network or mail delivery service is down, and can be compacted to save space on your computer.

For information about the location your messages are delivered to, click . For information about how to select a location to send and receive messages from, click

. For information about how to set up a personal folder file, click .

**Methods** you can use to send and receive messages (in most cases, the method you use depends on the location you send and receive messages from):

- Connect to a network with a continuous connection, either by phone or over a network line, click the **Tools** menu, and then click **Send and Receive**. If you are connected to an Exchange server this is an automatic process. If you use multiple mail delivery services, you can use the **Send and Receive** command, and then select the services you want to send and receive messages from.
- Synchronize your offline folders to make the contents of these folders on your local computer the same as the contents of the mailbox on a server. This option is only available with Microsoft Exchange Server, and you must have an offline folder file set up.
- Connect using Remote Mail to screen out messages you don't want to download. First, download the message headers, and then download only the messages that you select. With this option, you must have an Outlook folder file to deliver messages to.

You can use the e-mail location and method options listed above in combinations with each other, and you can use several of the options on the same computer. For example, you can receive messages in your personal folder file from a network location by using the **Send and Receive** command. If you work for an organization, check with your administrator to see which solution is best for you.

Return to [Set up where and how e-mail messages are delivered](#)

## About offline folders

Offline folders are the quickest and easiest way to work offline with Microsoft Exchange. Offline folders make it possible to take a folder from a server location, work with the contents of the folder when you are not connected to the network, and then update the folder and its corresponding server folder to make the contents of both identical.

You can filter both the contents of your offline folder and messages to be downloaded to your offline folder. You can add, delete, and modify the contents of an offline folder exactly as you can with a folder on a server.







For example, you can change and move items in your offline Inbox, send messages that are placed in your offline Outbox, and read your offline public folders. On the server, you can receive new messages in your Inbox, and other users can add, delete, and change items in public folders. But you will not be aware of these changes on the server while you work with the offline folder.

You can have Outlook automatically update the contents of the offline folder and its corresponding server folder so that they are identical, or you can manually synchronize the folders and continue to work offline. The **Synchronize** command (on the **Tools** menu) connects to the server, copies the changes made in each folder to the other folder, and then disconnects.. Any item that is deleted from either the offline folder or the corresponding server folder is deleted from both. If you have Outlook set up to work offline, you can also arrange to have the synchronization automatically take place in the background while you work with your offline folders.

Offline folders are stored in the offline folder (.ost) file. This file is located on your computer hard disk and is available even when the network is down. The .ost file can be compacted to save space on your computer.



## Set up offline folders

- 1 If you have not already done so, set up Outlook on the computer you want to work with offline. If the prompt "Do you travel with this computer?" appears when you create your profile, click **Yes**.  
If you already set up Outlook on the computer you want to work with offline, you must create an offline folder (.ost) file. For information about how to create an offline folder file, click .
- 2 Connect to the network.
- 3 Download the Address Book to your computer. If you will be using the security feature for sealed messages while offline, be sure you download the Address Book with security details information.  
 How?
- 4 If you plan to work offline with dial-up networking, and if you have not already done so, set up and configure dial-up networking software. For information about how to set up a dial-up connection, see the **Setting up a network connection using Dial-up Networking** topic in Windows Help.
- 5 Add the public folders you want to work with offline to your Public Folders Favorites folder.  
 How?
- 6 Specify the folders you want to be available for offline use.  
 How?
- 7 Synchronize the offline folders.  
 How?
- 8 Set Outlook to start offline.  
 How?
- 9 Quit Outlook, and then start Outlook again from an offline location.

## Use offline folders

1 If you have not already done so, set up offline folders.


 How?

2 Work as you normally do. Sent items remain in your Outbox.


3 If you have not enabled Outlook's automatic synchronization and want to update the offline folder file and the server file so that the contents are identical, and send e-mail messages in your Outbox, synchronize the folders.

 How?

## Create an offline folder file

- 1 Click **Inbox** .
- 2 On the **Tools** menu, click **Services**.
- 3 In the **The following information services are set up in this profile** box, click **Microsoft Exchange Server**.
- 4 Click **Properties**, and then click the **Advanced** tab.
- 5 Click **Offline Folder File Settings**.
- 6 In the **File** box, type the path to the file you want to use as the offline folder file.

## Make a folder available offline

The Inbox, Outbox, Deleted Items, Sent Items, Calendar, Contacts, Tasks, Journal, and Notes folders are automatically made available offline when you set up offline folders. To use your Drafts folder or any other folder offline, you must specifically enable them for offline use, by following the steps below. For information about how to set up offline folders, click .

- 1 If the Folder List is not visible, click the **View** menu, and then click **Folder List**.
- 2 In the Folder List, click the folder in your mailbox or in your Public Folders Favorites folder that you want to make available offline.
- 3 On the **File** menu, point to **Folder**, click **Properties for Folder name**, and then click the **Synchronization** tab.
- 4 Click **When offline or online**.
- 5 If you want to create a filter for this folder, click **Filter**.

 How?

- 6 Click **OK** twice. If you have not already set up an offline folder file, you are prompted to create one. Click **Yes**, and then follow the instructions on the screen.  
For Help, click the **Help** button in the dialog box.

- 7 Repeat steps 1 through 6 for each folder you want to make available offline.

- 8 Synchronize the offline folders.

 How?

## Synchronize offline folders


- To manually synchronize the selected offline folder, click the **Tools** menu, point to **Synchronize**, and then click **This Folder**.
- To manually synchronize all your offline folders, click the **Tools** menu, point to **Synchronize**, and then click **All Folders**.
- To automatically synchronize all folders at specified intervals, select the **Enable Offline Access** check box and then select the **When online automatically synchronize all offline folders every [n] minutes** check box on the **Mail Services** tab in the Options dialog box (on the **Tools** menu, click **Options**) and then click a time interval.
- To automatically synchronize all folders when you close Outlook, select the **Enable Offline Access** check box and then select the **When online, synchronize all folders upon exiting** check box on the **Mail Services** tab in the Options dialog box (on the **Tools** menu, click **Options**).
- To have Outlook automatically connect to the server and synchronize in the background while you are working with your offline folders, select the **Enable Offline Access** check box and then select the **Automatically connect and synchronize while offline** check box on the **Mail Services** tab in the Options dialog box (on the **Tools** menu, click **Options**).

**Note** If an error occurs during synchronization, a message appears in your Inbox folder with error information.


## Make a folder unavailable for offline use

- 1 If the Folder List is not visible, click the **View** menu, and then click **Folder List**.
- 2 In the Folder List, click the folder in your mailbox or in your Public Folders Favorites folder that you want to make unavailable for offline use.
- 3 On the **File** menu, point to **Folder**, click **Properties for *Folder name***, and then click the **Synchronization** tab.
- 4 Click **Only when online**.

### Notes

- To make your Inbox, Outbox, Deleted Items, Sent Items, Calendar, Contacts, Tasks, Journal, Notes, and Drafts folders unavailable offline, you must disable or delete your offline folder file. For information about how to disable an offline folder file, click .
- If the folder you want to make unavailable for offline use contains subfolders that are available for offline use, those subfolders remain available.

## Compact an offline folder file

- 1 Click **Inbox** .
- 2 On the **Tools** menu, click **Services**.
- 3 In the **The following information services are set up in this profile** box, click **Microsoft Exchange Server**.
- 4 Click **Properties**, and then click the **Advanced** tab.
- 5 Click **Offline Folder File Settings**.
- 6 Click **Compact Now**.

## Disable an offline folder file

1 Synchronize your offline folders to copy new items from the offline folders to the server folders.

 How?

2 Click **Inbox** .

3 On the **Tools** menu, click **Services**.

4 In the **The following information services are set up in this profile** box, click **Microsoft Exchange Server**.

5 Click **Properties**, and then click the **Advanced** tab.

6 Click **Offline Folder File Settings**.

7 Click **Disable Offline Use**.


**Note** To permanently remove the offline folder file from your hard disk, you must delete it.



## Check the status of an offline folder


- 1 If the Folder List is not visible, click the **View** menu, and then click **Folder List**.
- 2 In the Folder List, click the folder in your mailbox or in your Public Folders Favorites folder that you want to check the offline status for.
- 3 On the **File** menu, point to **Folder**, click **Properties for *Folder name***, and then click the **Synchronization** tab.
- 4 Under Statistics for this folder, read the status descriptions.

## Set Outlook to start offline


- 1 Click **Inbox** .
- 2 On the **Tools** menu, click **Services**.
- 3 In the **The following information services are set up in this profile** box, click **Microsoft Exchange Server**.
- 4 Click **Properties**, and then click the **General** tab.
- 5 To always start Outlook offline, click **Manually control connection state**, and then click **Work offline and use dial-up networking**.
  - To choose each time you start whether to work offline or online, click **Manually control connection state**, and then select the **Choose the connection type when starting** check box.
  - To always connect to the network, click **Manually control connection state**, and then click **Connect with the network**.
  - To have Outlook automatically detect whether you are offline or not, click **Automatically detect connection state**.
- 6 To specify the amount of time to wait for a response from the server, before being notified to retry or work offline, enter a number in the **Seconds Until Server Connection Timeout** box.
- 7 Click the **Advanced** tab.
- 8 Select the **Enable offline use** check box.
- 9 Click **OK** twice.
- 10 Quit and restart Outlook.

## Determine where e-mail messages are sent from and received

1 If the Folder List is not visible, click the **View** menu, and then click **Folder List**.

2 Look for the Outlook Today icon  in the top-level folder icons. E-mail messages are sent from and received in the Inbox of this folder.

## Create or modify a filter for an Offline folder

- 1 If the Folder List is not visible, click the **View** menu, and then click **Folder List**.
- 2 In the Folder List, click the folder in your mailbox or in your Public Folders Favorites folder that you want to create a filter for.
- 3 On the **File** menu, point to **Folder**, click **Properties for Folder name**, and then click the **Synchronization** tab.
- 4 Click **Filter**.
- 5 Select the filter options you want.  
For Help on an option, click the question mark , and then click the option.
- 6 To filter using additional criteria such as a category or importance level, click the **More Choices** tab, and then select the options you want.
- 7 To filter using additional or custom fields, click the **Advanced** tab, and then select the options you want.

 How?

**Note** If you select more than one option, only the items that meet all of the criteria appear. However, if you use the same field to set multiple criteria, items that meet one criterion within that field are found.

## **Remove a filter from an offline folder**

- 1** If the Folder List is not visible, click the **View** menu, and then click **Folder List**.
- 2** In the Folder List, click the folder in your mailbox or in your Public Folders Favorites folder that you want to create a filter for.
- 3** On the **File** menu, point to **Folder**, click **Properties for *Folder name***, and then click the **Synchronization** tab.
- 4** Click **Filter** and then click **Clear All**.

## Turn off background synchronization

Right-click the progress symbol on the status bar, and then click **Cancel** on the shortcut menu.

## **Set time interval for automatic synchronization**

- 1** On the **Tools** menu, click **Options** and then click the **Mail Services** tab.
- 2** Select the **Make local copies of folders available offline** check box.
- 3** Select the **When online, automatically synchronize all offline folders every <n> minutes** checkbox and then click a time interval.

## **I have turned on automatic synchronization, but my folders are not being synchronized**

Even though you may have specified automatically synchronizing your offline folders while you are online, this will not occur if Outlook determines that you have a slow connection. This is for performance reasons. To manually synchronize all your folders, click the **Tools** menu, point to **Synchronize**, and then click **All Folders**. To synchronize one folder, select the folder, click the **Tools** menu, point to **Synchronize**, and then click **This Folder**.




## About public folders

Public folders are an easy and effective way to collect, organize, and share information with others on your team or across your organization. You can use public folders to store any type of file or Outlook item.

Use public folders to:

- Post information on an electronic bulletin board. People who use the bulletin board can participate in online discussions. For example, a workgroup can review and provide feedback on new product ideas.
- Screen the contents of messages before publishing with moderated public folders. This is useful when you want to enforce certain guidelines or policies.
- Share Outlook items in a schedule, contact list, or task list. People can review information that is constantly updated. For example, you might use a company calendar folder to publicize company meetings and holidays, a group contacts folder to make information about the people who work on a project available to everyone, and a team tasks folder to help everyone keep track of work on a project.
- Share files. People have fast access to files created in other programs, such as Microsoft Excel or Word. For example, you might use an employee information folder to find information about company policies or a product reference folder to get product information out to everyone who needs it.

Public folders are created and designed by administrators and others in your workgroup or organization who have the appropriate permission. If you have permission, you can set up your own public folders and give other people permission to use them. If you want to be innovative, you can apply your own custom views, forms, custom fields, and rules to your public folders.

To use public folders, you must have permission to read items. For information about how to check folder permissions, click .

## Check your public folder permission status

- 1 If the Folder List is not visible, click the **View** menu, and then click **Folder List**.
- 2 Click **Public Folders**, and then right-click the public folder you want to check your permission level for.
- 3 Click **Properties** on the shortcut menu.
- 4 Click the **Summary** tab. Your permission level appears under **Your permissions**.  
If the **Permissions** tab appears instead of the **Summary** tab, you have owner permission. If neither tab appears, you do not have permission to change the folder properties.

## Check your shared private folder permission status

1 Open the shared private folder you want to check the permission status for.

 How?


2 On the **File** menu, point to **Folder**, and then click **Properties for Folder name**.

3 Click the **Summary** tab. Your permission level appears under **Your permissions**.

If the **Permissions** tab appears instead of the **Summary** tab, you have owner permission. If neither tab appears, you do not have permission to change the folder properties.

## Outlook folder permissions


If your administrator has set up a public folder, you may have permission to use some or all of the folders within the public folder. If someone has shared one of their private folders with you, then you have permission to perform certain activities in that folder. The extent of the activities you can perform in a public folder or a shared private folder (that you have permission to open) depends on your role (or combination of permissions) in that folder.

For information about how to check public folder permissions, click . For information about how to check shared private folder permissions, click



<b>In this role</b>	<b>You can</b>
Owner	Create, read, modify, and delete all <u>items</u> and files and create subfolders. As the folder owner, you can change the permission levels others have for the folder.
Publishing Editor	Create, read, modify, and delete all items and files, and create subfolders.
Editor	Create, read, modify, and delete all items and files.
Publishing Author	Create and read items and files, create subfolders, and modify and delete items and files you create.
Author	Create and read items and files, and modify and delete items and files you create.
Reviewer	Read items and files only.
Contributor	Create items and files only. The contents of the folder do not appear.
Custom	Perform activities defined by the folder owner.
None	Not open the folder; you have no permission.





## View information in a public folder

To view information in a public folder, you must have permission to read items. For information about how to check folder permissions, click .

You can view information in a public folder in the following ways:

- Open a public folder to move through the folders under it or to view items or files in the folder.
- Switch to another preset view in a public folder to see a different arrangement of details.
- Save a personal view of a public folder to customize the view, even if you don't have permission to make changes in the folder. When you save a personal view of a public folder, that view is always available to you.
- If you own a public folder, you can change the view that appears when others first open the folder.


### What do you want to do?

-  Open a public folder
-  Switch to another view
-  Save a personal view of a public folder
-  Change the default view for a public folder

## Open a public folder

- 1 If the Folder List is not visible, click the **View** menu, and then click **Folder List**.
- 2 Click **Public Folders**, and then click the folder you want to open.

If the folder you want to open is located within another folder, click the plus sign (+) next to each subfolder until you find the folder you want.

**Tip** To quickly open a public folder that you use often, create a [shortcut](#) to the public folder on the [Outlook Bar](#). For information about how to create a shortcut to a public folder, click .

## Save a personal view of a public folder

1 Open the public folder you want to save a personal view for.

 How?

2 On the **View** menu, point to **Current View**, and then click **Define Views**.

3 In the **Views for Folder** box, click **Current view settings**.

4 Click **New**.

5 In the **Name of new view** box, type a name.

6 In the **Type of view** box, select the view type you want.

 How?

7 Under Can be used on, click **This folder, visible only to me**.

8 Click **OK**.


9 Click a button, and then select the options you want to use.

For Help on an option, click the question mark , and then click the option.

10 When you finish selecting options, click **OK**.

11 To use the view immediately, click **Apply View**.



## Share Outlook items in a public folder

To share Outlook items in a public folder, you must have permission to create items. For information about how to check folder permissions, click .

You can add Outlook items to a public folder in two ways:

- Create a new item.
- Copy or move an existing item from another folder.

### What do you want to do?

-  [Create a new item in a public folder](#)
-  [Add an existing item to a public folder](#)



## Create a new item in a public folder

1 Open the public folder you want to create an item in.



2 On the **File** menu, point to **New**, and then click the command for an item of the same type as other items in the folder.

3 Type a name for the new item.

4 Select the options you want.

5 Click **Save and Close**  or click **Post**




## Add an existing item to a public folder

- 1 If the Folder List is not visible, click the **View** menu, and then click **Folder List**.
- 2 Click **Public Folders**, and then locate the public folder you want to add the existing item to.
- 3 Open the folder that contains the item you want to add to the public folder.
- 4 Use the right mouse button to drag the item to the public folder you want in the Folder List.

On the shortcut menu, click **Copy** or **Move**.

**Tip** You can temporarily show the Folder List to add an existing item to a public folder. When the Folder List is not visible, drag the item to the name in the Folder Banner. Then drag the item to the public folder you want in the Folder List. If the public folder you want is located within a closed subfolder, hold the item over the name of the subfolder to open it.


## Delete an item or file from a public folder

To delete items or files from a public folder, you must have permission. For information about how to check folder permissions, click .

**1** Open the public folder you want to delete items or files from.

 [How?](#)


**2** Select the items or files you want to delete.

 [How?](#) **3** Click **Delete**



## Create a shortcut to a public folder you use often

If your organization has a long list of [public folders](#), you'll probably want to create [shortcuts](#) to the public folders you use most often. You can keep shortcuts to public folders on the [Outlook Bar](#) or in the Favorites folder under Public Folders.

- Add a public folder to the Outlook Bar as a shortcut, to save time instead of looking through the Folder List.
- Add a public folder shortcut you receive in an e-mail message to the Outlook Bar if you want to use the shortcut often.
- Add the public folder to the Favorites folder (under Public Folders in the Folder List) if you want to make the public folder available for use with offline folders. (For information about offline folders, click .) Then, to add a shortcut to the public folder that you want to use with offline folders, create the shortcut from the Favorites folder instead of from the public folder. For information about how to set up offline folders, click



### What do you want to do?



[Add a public folder shortcut to the Outlook Bar](#)



[Add a public folder shortcut you receive in an e-mail message to the Outlook Bar](#)



[Add a public folder shortcut to the Public Folder Favorites folder](#)

## **Add a public folder shortcut to the Outlook Bar**

- 1** On the Outlook Bar, click the group you want to put the public folder shortcut in.
- 2** If the Folder List is not visible, click the **View** menu, and then click **Folder List**.
- 3** Right-click the public folder you want to add a shortcut on the Outlook Bar for, and then click **Add to Outlook Bar**.

## **Add a public folder shortcut you receive in an e-mail message to the Outlook Bar**

1 Open the e-mail message that contains the public folder shortcut.

 How?

2 Double-click the shortcut to open the public folder in a separate window.

3 Position the Outlook and public folder windows so you can see both.

 How?

4 In the public folder window, drag the icon from the right side of the Folder Banner to the Outlook Bar.

## **Add a public folder shortcut to the Public Folder Favorites folder**

- 1** If the Folder List is not visible, click the **View** menu, and then click **Folder List**.
- 2** Click **Public Folders**, and then click the public folder you want to add as a shortcut to the Favorites folder.
- 3** On the **File** menu, point to **Folder**, and then click **Add to Public Folder Favorites**.
- 4** To change the name of the public folder that appears in your Favorites folder, type a new name in the **Favorite folder name** box.
- 5** To add shortcuts to subfolders of this public folder, click **Options**, and then select the options you want.  
For help on an option, click **Help**.
- 6** Click **Add**.

## Send a public folder shortcut in an e-mail message

1 Open the public folder you want a shortcut in an e-mail message to point to.

 How?

2 Create an e-mail message, but don't send it yet.

 How?


3 Drag the icon for the public folder from the right side of the Folder Banner to the e-mail message button on the Windows taskbar, and then to the text box of the mail message.

4 Click **Send** .

**Note** The message recipient must use Outlook to use the public folder shortcut.



## Set up a moderated public folder

You must have owner permission for a [public folder](#), to designate it as a moderated folder. For information about how to check folder permissions, click .

- 1 If the Folder List is not visible, click the **View** menu, and then click **Folder List**.
- 2 Click **Public Folders**, and then click the public folder you want to designate as a moderated folder.
- 3 On the **File** menu, point to **Folder**, and then click **Properties**.
- 4 On the **Administration** tab, click **Moderated Folder**.
- 5 Select the **Set folder up as a moderated folder** check box.
- 6 In the **Forward new items to** box, enter the name of the person who will screen the incoming messages or the name of an alternate public folder where the messages are stored for review.
- 7 To automatically send a response when a new message is received by the moderator, select an option under **Reply to new items with**.


The standard response reads: "Thank you for your submission. Please note that submissions to some folders or discussion groups are reviewed to determine whether they should be made publicly available. In these cases, there will be a delay before approved submissions can be viewed by others."


To send a custom response, click **custom response**, and then click **Template**. Type the text of your custom response.

- 8 To add or remove names of people who are moderators, click **Add** or **Remove**.  
To view the properties of a selected moderator, click **Properties**.









## Use a public folder as a bulletin board

To use a public folder as a bulletin board, the folder must be able to store e-mail messages, and you must have permission to read, create, and modify items. For information about how to check folder permissions, click .

You may be required to use a specific form to post information. For information about ways to use a public folder as a bulletin board, click .

### What do you want to do?

-  View posted information in a public folder by conversation topic
-  Post information in a public folder
-  Post a reply to information in a public folder
-  Reply to the person who posted information in a public folder
-  Forward an item or file posted in a public folder
-  Post an Office file to a Microsoft Exchange folder

## **About using a public folder as a bulletin board**

You can use a public folder as a bulletin board to facilitate an online conversation among members of a group. Members can participate at any time from any location. Members can also stay up-to-date on issues that affect the group. You can work with posted information in the following ways:


- To get an overview of an online discussion without reading all of the details, you can view posted information in a folder by conversation topic.
- To start an online conversation on a new topic, you can post the information in a public folder.
- Once the online discussion is started, you can post a reply in the public folder for the group to read.
- If you don't want the entire group to read your reply, you can reply directly to the person who posted the information, or forward posted information to only the recipients you select.

If you use a Microsoft Office program, such as Microsoft Excel, you can post files to a public folder from the Office program. For example, you may want to post sales projections or quarterly sales reports for a product in a Microsoft Excel workbook so the group can quickly view or record the latest information.

Return to [Use a public folder as a bulletin board](#)

## View posted information in a public folder by conversation topic


1 Open the public folder that contains posted information you want to view by conversation topic.

 How?

2 On the **View** menu, point to **Current View**, and then click **By Conversation Topic**.

## Post information in a public folder

1 Open the public folder you want to post information in.

 How?

2 To use the default form for posting information, click the **File** menu, point to **New**, and then click **Post in This Folder**.

3 Enter the information you want to post in the form.

4 Click **Post**  **Tip**

## Post a reply to information in a public folder

1 Open the public folder that contains posted information you want to reply to.

 [How?](#)




2 Select the item or file you want to post a reply to.

3 To use the default form to reply to posted information, click the **Actions** menu, and then click **Post Reply to This Folder**.

4 Enter the information you want to post in the form.

5 Click **Post** .

## Reply to the person who posted information in a public folder

- 1 Open the public folder that contains the information you want to reply to.  
 How?
- 2 Select the item or file you want to reply to.
- 3 Click **Reply** . Type your reply.
- 4 Click **Send** .



## Forward an item or file posted in a public folder

1 Open the public folder that contains the item or file you want to forward to others.

 How?

2 Select the item or file you want to forward.

 How?

3 Click **Forward** .

4 In the **To** and **Cc** boxes, enter recipient names.

5 If you forward several items or files, type the subject of the message in the **Subject** box.

6 Click **Send** .

**Note** If you select multiple items or files, they are forwarded as attachments in a new message.

## Share a schedule, contact list, or task list in a public folder

To share a schedule, contact list, or task list with a group, you must have permission to read [items](#). For information about how to check folder permissions, click [»](#).

For information about ways to share a schedule, contact list, or task list in a public folder, click [»](#).

### What do you want to do?

- [»](#) [Share a schedule](#)
- [»](#) [Share a contact list](#)
- [»](#) [Share a task list](#)

## **About sharing a schedule, contact list, or task list in a public folder**

You can use [public folders](#) to share the information in the following ways:

- Share a schedule to keep track of meetings, events, holidays, vacation time, and project deadlines that affect the group.
- Share a contact list to make names, job titles, addresses, and phone numbers available to the group. A public folder of contacts is a good way to publish contact information for members in the group as well as for contacts outside the group.
- Share a task list to keep track of each member's progress on a project the group is working on.

Return to [Share a schedule, contact list, or task list in a public folder](#)

## Share a schedule

- 1 Set up a public folder.

If you create a new Calendar folder instead of copying an existing Calendar folder, be sure to select Calendar as the type of folder you want to create.

 [How?](#)

- 2 Add meetings and events to the Calendar.

 [How?](#)

- 3 Send a shortcut to the public folder in an e-mail message to those you gave permission to use the folder.

 [How?](#)

## Share a contact list

- 1 Set up a public folder.

If you create a new Contacts folder instead of copying an existing Contacts folder, be sure to select Contacts as the type of folder you want to create.


 [How?](#)

- 2 Add contacts to the contact list.

 [How?](#)

- 3 Send a shortcut to the public folder in an e-mail message to those you gave permission to use the folder.

 [How?](#)

**Note** To have the shared contact list appear in the Outlook Address Book, public folder users must set up the public folder of contacts to appear in the [Address Book](#) dialog box. When the shared contact list appears as an Outlook Address Book, it's available to use for Mail Merge in Word and to check names in messages in Outlook. For information about how to set up a contacts folder to display in the Address Book, click .

## Share a task list

- 1 Set up a public folder.

If you create a new Tasks folder instead of copying an existing Tasks folder, be sure to select Tasks as the type of folder you want to create.

 [How?](#)

- 2 Add tasks to the task list.

 [How?](#)

- 3 Send a shortcut to the public folder in an e-mail message to those you gave permission to use the folder.

 [How?](#)

**Note** You cannot create a task request from a public folder. When you add tasks to a public folder, don't create a task request from a private folder to assign a task to the public folder. If you do, the due date for the task will not be visible.

## Copy information from a public folder to a private folder in Outlook

To copy an appointment, a contact, or a task from a [public folder](#) to your private Calendar, Contacts, or Tasks folder in Outlook, you must have permission to read [items](#) in the public folder. For information about how to check folder permissions, click [»](#).

For information about ways to copy information from a public folder to a private folder, click [»](#).

### What do you want to do?

- [» Copy an appointment to your private Calendar](#)
- [» Copy a contact to your private contact list](#)
- [» Copy a task to your private task list](#)
- [» Copy any item from a public folder to create a new item in a private folder](#)

## **About copying information from a public folder to a private folder**

You can copy information from a public folder to a private folder in Outlook in the following ways:

- Copy an appointment from a public folder to your private Calendar in Outlook to view the appointment with other activities in your Calendar.
- Copy a contact from a public folder to your private contact list in Outlook to add personal notes to the contact or to export the contact to a file with the rest of your personal contacts.
- Copy a task from a public folder to your private task list in Outlook to keep track of your work on the task privately, or to assign the task to someone else and track the progress of the task in your task list.
- Copy any item from a public folder to create a new item in a private folder. To do this, use the right mouse button to drag the item to a folder that contains items of a different type. You can then copy the item you drag as text, a shortcut, or an attachment in the text area of the new item. For example, you can copy a contact from a public folder to your Inbox as an attachment in a message, and then send the contact to someone who doesn't have permission to use the public folder.

Return to [Copy information from a public folder to a private folder in Outlook](#)



## Copy an appointment to your private Calendar


1 Open the public folder you want to copy an appointment from.

 How?

2 Open the appointment you want to copy to your private Calendar.

3 On the **Actions** menu, click **Copy to Personal Calendar**.

## Copy a contact to your private contact list

- 1 Open the public folder you want to copy a contact from.
- 2  How? Open the contact you want to copy to your private contact list.
- 3 On the **Actions** menu, click **Copy to Personal Contacts**.

## Copy a task to your private task list

1 Open the public folder you want to copy a task from.

 How?

2 Open the task you want to copy to your private task list.

3 On the **Actions** menu, click **Copy to Personal Task List**.

## Copy any item from a public folder to create a new item in a private folder

1 Open the public folder you want to copy an item from.

 How?

2 Use the right mouse button to drag the item to a private folder that contains items of a different type.

3 To copy the item as text in the new item, click **Copy Here as *Item* with Text** on the shortcut menu.

To copy the item as a shortcut in the new item, click **Copy Here as *Item* with Shortcut** on the shortcut menu.

To copy the item as an attachment in the new item, click **Copy Here as *Item* with Attachment** on the shortcut menu.

## Move an item from a public folder to create a new item in a private folder

To move an item from a [public folder](#) to your private Calendar, Contacts, or Tasks folder in Outlook, you must have permission to delete [items](#) in the public folder. For information about how to check folder permissions, click [How?](#)

**1** Open the public folder you want to move an item from.


[How?](#)

**2** Use the right mouse button to drag the item to a private folder that contains items of a different type.

**3** Click **Move** on the shortcut menu.





**Note** You can only move notes to a private Notes folder.

## Share files in a public folder

You can use public folders to share files that are frequently read or updated by people in a group. You must have the program the file was saved in set up on your computer. You also must have permission to read or create items in the public folder. For information about how to check folder permissions, click .

For information about ways to share files in a public folder, click .

### What do you want to do?

-  [Open a file in a public folder](#)
-  [Start a new Office file from a public folder](#)
-  [Copy a file from Windows Explorer to a public folder](#)
-  [Post an Office file to a Microsoft Exchange folder](#)

## About sharing files in a public folder

You can share files by using public folders in the following ways:


- Open a file in a public folder to read or update the file or to quickly browse through a series of files.
- If you use a Microsoft Office program, such as Microsoft Excel, Word, PowerPoint, or Microsoft Access, you can start a new Office file from the public folder. Use this method to use commands and tools from the other program without leaving Outlook.
- Use Windows Explorer to copy an existing file from another program that is not open. Use this method to share the file in a public folder without opening the other program.
- Post an existing Office file to a public folder from another Office program that is already open. Use this method to share the file in a public folder without exiting the other program. For example, you may want to post sales projections or quarterly sales reports you just updated for a product in a Microsoft Excel workbook so the group can quickly view the latest information.

When you copy a file from Windows Explorer or post a file from another Office program that is open to a public folder, the original file remains where it is stored. Changes to the copied or posted file in the public folder don't affect the original file.

Return to [Share files in a public folder](#)

## Open a file in a public folder

1 Open the public folder that contains the file you want to open.

 How?

2 Double-click the file.

**Tip** To go to the next Office file, click **Next Item** . To go to the previous Office file, click **Previous Item**





## Copy a file from Windows Explorer to a public folder

1 Open the public folder you want to copy a file to.

 How?

2 Use Windows Explorer or My Computer to find the file you want to copy.


3 Position the Folder List and the other window so you can see both.

 How?

4 Drag the file from Windows Explorer or My Computer to the public folder you want in the Folder List.



## Set up a public folder

You may want to work with your administrator to set up a public folder. For more information about public folders, see the *Microsoft Office 97 Resource Kit*. For information about how to obtain the Office Resource Kit, click .

**1** Create the public folder.

 How?

**2** Set permission levels to determine who can use the public folder and to what extent.

 How?

**3** Create views to organize and find information.

 How?

**4** Set the default view for the folder.

 How?

**5** Specify the forms available for others to post information in the public folder.

 How?

**6** Create rules to process items posted in the folder.

 How?

**7** Notify others that the public folder is available by sending them a shortcut to the folder.

 How?

## Change the default form in a public folder


This procedure requires owner permission.

- 1 Right-click the folder you want to specify the default form for, and then click **Properties** on the shortcut menu.
- 2 In the **When posting to this folder, use** box, click the form you want others to use.

## Create a public folder

To create a public folder, you must have permission to create folders in an existing public folder. For information about how to obtain permission, see your administrator.

- 1** On the **File** menu, point to **New**, and then click **Folder**.
- 2** In the **Name** box, enter a name for the folder.
- 3** In the **Folder contains** box, click the type of folder you want to create. The type of folder determines the type of item the folder can contain.
- 4** In the **Make this folder a subfolder of** box, click the public folder you want your new public folder to appear in.
- 5** In the **Description** box, type a description of the folder.

**Tip** You can copy a private folder to a public folder to quickly start a public folder with existing items. For information about how to copy a folder, click .

## Use Outlook table views with Microsoft Exchange

The Outlook table [view type](#) can include features that Microsoft Exchange Client doesn't support, such as formula fields, combination fields, and sorting by more than one field. If you share a private folder, create a public folder, or give someone delegate access to a folder, and the folder is used with Microsoft Exchange Client, you can make custom table views available to Microsoft Exchange users with only the features Microsoft Exchange supports. You can do this by having Outlook automatically keep a version of the view that Microsoft Exchange Clients can use.

To make custom table views available to Microsoft Exchange Client users, you must have owner permission for the folder, and you must have defined at least one custom table view for the folder, and then selected the **This folder, visible to everyone** option in the Copy View dialog box when you saved the custom table view. For information about how to check folder permissions, click .

- 1** If the Folder List is not visible, click the **View** menu, and then click **Folder List**.
- 2** Click **Public Folders**, and then right-click the folder for which you want to make table views available in Microsoft Exchange.
- 3** Click **Properties** on the shortcut menu.
- 4** On the **General** tab, select the **Automatically generate Microsoft Exchange views** check box.

Outlook will keep a Microsoft Exchange version of custom table views you create or change from this point on.


**Note** If you change the custom table view in Microsoft Exchange, the changes are not saved in Outlook.

## Change the default view for a public folder

To change the default view for a public folder, you must have owner permission for the folder, and there must be at least one custom view defined that is visible to everyone for the folder.

- 1** If the Folder List is not visible, click the **View** menu, and then click **Folder List**.
- 2** Click **Public Folders**, and then right-click the public folder you want to change the default view for.
- 3** Click **Properties** on the shortcut menu.
- 4** Click the **Administration** tab.  
If the **Administration** tab does not appear, you don't have owner permission.
- 5** In the **Initial view on folder** box, enter the view you want to appear each time the folder is opened.  
The **Normal** view displays the default Outlook view for the type of items in the folder.


## Change the name in the From field of messages copied or moved to a public folder

To change the **From** box setting for a public folder, you must have owner permission for the folder. For information about how to check folder permissions, click .

- 1** If the Folder List is not visible, click the **View** menu, and then click **Folder List**.
- 2** Click **Public Folders**, and then right-click the public folder you want to change the **From** box setting for.
- 3** Click **Properties** on the shortcut menu.
- 4** Click the **Administration** tab.
- 5** To keep the name of the person who originally sent the message in the **From** box, click **Move/Copy** in the **Drag/Drop posting is a** box.  
To display the name of the person who moved or copied the message in the **From** box, click **Forward** in the **Drag/Drop posting is a** box. The name of the person who originally sent the item appears in the text box of the message.




## Add an e-mail address for a public folder to your Personal Address Book

You must have a [Personal Address Book](#) set up in your user [profile](#) to add an address for a [public folder](#). For information about how to add a Personal Address Book to your profile, click .


- 1 If the Folder List is not visible, click the **View** menu, and then click **Folder List**. Click **Public Folders**, and then right-click the public folder you want to add to your Personal Address Book.
- 2 Click **Properties** on the shortcut menu.
- 3 If you do not own the folder, click the **Summary** tab.  
If you own the folder, click the **Administration** tab.  
If neither tab is available, you cannot add an e-mail address for the public folder to your Personal Address Book.
- 4 Click **Personal Address Book**.

## Limit access to a public folder to the owners only

You must have owner permission for a public folder to limit access to the folder. For information about how to check folder permissions, click .

- 1 If the Folder List is not visible, click the **View** menu, and then click **Folder List**. Click **Public Folders**, and then right-click the public folder you want to limit access to.
- 2 Click **Properties** on the shortcut menu.
- 3 Click the **Administration** tab.
- 4 Under This folder is available to, click **Owners only**.

## Create or modify a rule for a public folder

You must have owner permission for a public folder to create or modify rules for the folder. For information about how to check folder permissions, click .

- 1** If the Folder List is not visible, click the **View** menu, and then click **Folder List**. Click **Public Folders**, and then right-click the public folder you want to create or modify rules for.
- 2** Click **Properties** on the shortcut menu.
- 3** Click the **Administration** tab, and then click **Folder Assistant**.
- 4** To create a rule, click **Add Rule**.  
To modify a rule, select a rule in the list, and then click **Edit Rule**.
- 5** Enter the conditions the item must meet for the action to occur. For more conditions, click **Advanced**.  
For Help on an option, click **Help**.
- 6** Under Perform these actions, select the options you want.

**Note** When you create a rule, it is active by default.


## Specify the forms that are available for a folder


You must have editor, publishing editor, or owner permission to add forms to a private shared folder or a public folder. If the folder is a public folder, and you have owner permission, you can limit the forms that are available to other people who use the folder.

- 1 If the Folder List is not visible, click the **View** menu, and then click **Folder List**.
- 2 Click **Public Folders**, and then right-click the folder you want to specify forms to be available for.
- 3 Click **Properties** on the shortcut menu.
- 4 Click the **Forms** tab, and then click **Manage**.
- 5 In the box to the left, select the forms you want to use in the folder, and then click **Copy**.  
If the form is in a different forms library, click **Set** to change the library.
- 6 Click **Close**.
- 7 If the folder is a public folder, click an option under Allow these forms in this folder, to limit the forms you want to be available for other people who use the folder.

**Note** Forms that are available for a folder are listed at the bottom of the item menu when you work in the folder. For example, forms for Inbox are at the bottom of the **Compose** menu.

## Set sharing permissions for a public folder

You must have owner permission for a public folder to set sharing permissions for the folder. You can set permissions for only one folder at a time. For information about folder permissions, click .

- 1** If the Folder List is not visible, click the **View** menu, and then click **Folder List**. Click **Public Folders**, and then right-click the folder you want to change sharing permissions for.
- 2** Click **Properties** on the shortcut menu.
- 3** Click the **Permissions** tab.
- 4** To set permissions that apply to everyone who can use the folder, click **Default** in the **Name** list.  
In the **Roles** box, select the role you want to assign to everyone. Or create a custom role by selecting individual options below the **Roles** box.  
For Help on an option, click the question mark , and then click the option.
- 5** To set different permissions for a particular person, click **Add**.  
In the **Type name or select from list** box, enter the name of the person whose permission level you want to change, click **Add**, and then click **OK**. In the **Names** box, click the name you just added. In the **Roles** box, click the role you want for that person.





## Troubleshoot public folders


### What do you need help with?

- » [Where did the information in my public folder go?](#)
- » [Why isn't the view I want available in a public folder?](#)
- » [Why isn't the form I want available in a public folder?](#)
- » [Why can't I add an item to a public folder?](#)
- » [Why weren't my changes saved to a file in a public folder?](#)
- » [The \*\*Synchronization\*\* tab disappeared from the Properties dialog box for a public folder.](#)
- » [When I search for items in a public folder, I receive an error message.](#)
- » [What should I do with conflict messages in a public folder?](#)


## Where did the information in my public folder go?

- Some items may be temporarily hidden if the view you use filters out certain items. To view all of the items in a folder, click the **View** menu, click **Customize Current View**, click **Filter**, and then click **Clear All**.
- If you view items in a table, the items might be grouped, and the groups might be collapsed so that you can't see the items within them. To expand groups to display details, click the **Expand** button . To collapse groups to hide details, click the **Collapse** button

. Are you working offline? You may have opened the public folder by using a shortcut on the Outlook Bar that points to the original public folder instead of to a shortcut to the public folder in the Public Folders Favorites folder. To use the public folder offline, you must have a shortcut to the public folder in the Public Folders Favorites folder, and the public folder must be synchronized. For information about how to add a folder shortcut to the Public Folders Favorites folder, click

. For information about how to make a folder available offline, click




- Is the information you want under Public Folders in an offline folder? For information about offline folders, click . If the public folder you want is an offline folder, and the shortcut to the public folder on your Outlook Bar or in the Public Folders Favorites folder points to a public folder that has subfolders, the subfolders won't appear. You must create individual shortcuts in the Public Folders Favorites folder for each subfolder you want to use as an offline folder. For information about how to add a folder shortcut to the Public Folders Favorites folder, click






## Why isn't the view I want available in a public folder?

- The view you want to use may only be available to the owner of the public folder. Ask the owner to save a copy of the view that's visible to everyone. Contacts for a public folder appear on the **Summary** tab in the *Folder name* Properties dialog box. (Right-click the folder, and then click **Properties**.)
- The view you want to use may only be available in one folder. In that folder, save a copy of the view, and then make the copy available in all of the folders that contain the same type of item. For information about how to save a view, click .

## Why isn't the form I want available in a public folder?

You may not have permission to use the form, or you may be required to use another form to add information to the public folder. See the folder owner or your administrator. Contacts for a public folder appear on the **Summary** tab in the *Folder name* Properties dialog box. (Right-click the folder, and then click **Properties**.)


### **Why can't I add an item to a public folder?**

- You may not have permission to create items in the folder. See the folder owner or your administrator. For information about how to check folder permissions, click .
- Some public folders require that you post information by using a particular form that you may not have set up. For information about forms, see your administrator.

## Why weren't my changes saved to a file in a public folder?

- If the file is created in a program that doesn't support linked objects, Outlook may have opened the file as read-only and may not have been able to track and save your changes. To make changes, save a copy of the file on your hard disk, make your changes to the copy, and then save the copy in the public folder.
- If the file is created in a program that supports linked objects and embedded objects, you may have changed the file at the same time as another person. When more than one person changes a file in a public folder at the same time, and the program supports linked and embedded objects, only the changes made by the first person who saves the file are saved. To have more than one person change a file, try routing the file in an e-mail message so only one person at a time can make changes.

## The Synchronization tab disappeared from the Properties dialog box for a public folder.

The **Synchronization** tab only appears in the *Folder name* Properties dialog box for a public folder from the shortcut in the Public Folders Favorites folder. You must open the *Folder name* Properties dialog box from the shortcut, not from the original public folder, to use the **Synchronization** tab. For information about how to add a folder shortcut to the Public Folders Favorites folder, click .

## **What should I do with conflict messages in a public folder?**

If your organization keeps public folders on more than one Microsoft Exchange Server computer, and the same item is modified on different computers, you may see conflict messages if those computers are synchronized.

To resolve the conflict, open the conflict message. This message contains all conflicting versions of the item. To combine all of the information into one item, open one of the items listed in the conflict message, and then copy any information you want from the other items into it. Then click **Keep This Item**. The other conflicting items are deleted.

To save all of the conflicting items as separate items in the public folder, click **Keep All**.



## Compare using Remote Mail and offline folders

With Outlook, you can send and receive e-mail messages and share other information from your office, from home, and from the road. At the office, you typically connect to a server on a local network. While at home or on the road, you connect by using a modem, a telephone, dial-up networking software, and a [mail delivery service](#). You can use Remote Mail or offline folders to manage e-mail messages and other [items](#) from remote locations.

If you use Microsoft Exchange Server, it is recommended that you use offline folders to manage your remote connection. Offline folders provide the greatest flexibility. You can synchronize your Inbox, Calendar, Tasks, and any other folder from your remote location to make the contents identical to the contents of the same folders on the server. You can also download all of the items in a folder in one step. If you use offline folders, you cannot use the Remote Mail feature to download messages.

If you don't use Microsoft Exchange Server or only need to download messages from your Inbox, use the Remote Mail feature. Remote Mail makes it possible for you to screen out the messages you don't want to download by first downloading the [message headers](#) and then downloading the complete messages that you select.

Use the following table to determine which method is best for you.

<b>Use this method</b>	<b>When</b>	<b>Examples</b>
Remote Mail	You want to minimize time spent on the phone. You want to retrieve messages for your Inbox only. You use a server other than Microsoft Exchange Server.	You have a second computer at home with a slow modem. You connect from a hotel or airport where the cost of telephone access is high.
Offline Folders	You use Microsoft Exchange Server. You want to update the contents of any folder. You want to synchronize the folders between two computers. You don't need to worry about the cost of time on the phone.	You want to have identical contents on the server and on your remote computer. You want to download a calendar or task list to a remote computer. You have an inexpensive, local phone connection to your mail delivery service.

## Set up Remote Mail

**1** If you have not already done so, set up Outlook on the computer you want to use from a remote location.

**2** If you have not already done so, create a [personal folder \(.pst\) file](#) on your computer.

 [How?](#)

**3** Download the [Address Book](#) to your computer hard disk.

 [How?](#)

**4** Set options for your [mail delivery service](#).

 [How?](#)

**5** Set messages to be delivered to your personal folder file.

 [How?](#)

**6** Quit, and then restart Outlook.



## Use Remote Mail

You must set up your computer with a modem, a telephone, dial-up networking software, and a mail delivery service to use Remote Mail. Once you're set up, you connect and download the message headers to screen out the messages you don't want to download. Mark the message headers to download, copy, or delete messages. Then reconnect and download your messages.

**1** If it is not set up already, set up your computer for Remote Mail.

 How?

**2** Connect to a server and download message headers.

 How?



**3** Mark message headers to download, copy, or delete messages.

 How?

**4** Connect to a server and transfer the messages.

 How?

## Connect and transfer message headers or messages

- 1 If it is not set up already, set up your computer for Remote Mail.  
 How?
- 2 Click **Inbox** .
- 3 On the **Tools** menu, point to **Remote Mail**, and then click **Connect**.
- 4 Follow the instructions in the Remote Connection Wizard.


## Mark message headers to download, copy, or delete messages


When you download messages, they are placed on your local computer only. When you copy messages, a copy of the message is left on the server, and a copy is placed on your local computer. When you delete messages, they are removed from both your local computer and the server. If you use a docking laptop, it is recommended that you download the messages.

1 Click **Inbox** .

2 On the **Tools** menu, point to **Remote Mail**, and then click **Remote Tools**.

3 Select the messages you want to download, and then click **Mark to Retrieve** .

Select the messages you want to copy, and then click **Mark to Retrieve a Copy** .


Select the messages you want to delete, and then click **Delete** .

**Note** To unmark a message, click **Unmark** ; to unmark all messages, click **Unmark All**



## Set options for a Remote Mail delivery service

The options available for Remote Mail depend on the [mail delivery service](#) you use. For example, if you use Microsoft Exchange Server, you can schedule times for Remote Mail sessions or retrieve messages by using a filter.

- 1 Click **Inbox** .
- 2 On the **Tools** menu, click **Services**.
- 3 In the box labeled **The following information services are set up in this profile**, click the service you want to set options for.
- 4 Click **Properties**.
- 5 Select the options you want, and then click **OK**.  
For Help on an option, click **Help**.
- 6 Click the **Delivery** tab, and then select the options you want.
- 7 Click the **Addressing** tab, and then select the options you want.

### Notes

- If you use Microsoft Exchange Server, you may need to first create a dial-up connection. For information about how to set up a dial-up connection, see the **To set up a network connection by using Dial-up Networking** topic in Windows Help.
- Some mail delivery services give you options to choose from when you start the service. See the documentation provided with the service.



## Outlook features available when you use Microsoft Exchange Server

The screenshot displays the Outlook interface with several features highlighted by callouts:

- Create rules to organize inbox:** A callout points to the 'Subject' column header in the message list.
- Message Recall:** A callout points to the 'Message Recall Successful' message in the list.
- Read mail anywhere:** A callout points to the 'Home' button in the top right corner.
- Share information with public folders:** A callout points to the 'Public Folders' icon in the left sidebar.
- Vote in a message:** A callout points to the 'Yes, I need a copy' and 'No, I don't need a copy' buttons in the message preview pane.

The message list shows the following details:

From	Subject	Received
Michael Suyama	Product Line Changes	Mon 3/3 2: ...
Andrew Fu...	Northwind Category Sales	Mon 3/3 2: ...
Andrew Fu...	Message Recall Successful	Mon 3/3 2: ...

The message preview pane shows the following content:

Yes, I need a copy | No, I don't need a copy

**Please make a selection using the buttons above.**

We introduced two new product lines in the **March** catalog:

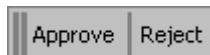
- **Gourmet chocolates:** "Our most opulent assortment, made from the highest quality ingredients, complete with exotic flourishes."
- **Budget chocolates:** "Simply produced, simply packaged, and simply delicious."

Create rules to help process and organize messages in your Inbox. For example, create a rule that moves all the messages from your manager into a separate folder or that forwards all the messages from a co-worker to the rest of the team.

You can use Outlook with a mail delivery service and a modem to send and receive messages from home, the office, the road, and even across the Internet. Work with e-mail messages from a remote location with the method that works best for you.

- With Remote Mail, you can quickly download message headers to preview the subject of messages, and then decide if you want to download or delete each message.
- If you store information on Microsoft Exchange Server and use offline folders, you can synchronize all of your Outlook folders so your messages, appointments, tasks, and other information you work with offline matches the contents of the folders on the server.

When you want others to answer a question, you can use voting buttons to collect the responses in e-mail.



Outlook tallies the votes in the original message in your Sent Items folder, so you can quickly view all the responses in one place.

You can recall or replace a message after you send it as long as the recipient has not read it. For example, you may want to recall a message you sent to the wrong person or replace a message if you forgot to include an attachment.

Use public folders to share information with a group of people. Public folders are useful when you have information that other people may be interested in or need to review; for example, you can share a contact list or task list with members of a project team, or participate in an online discussion with team members.

## Send a message with a digital signature

- 1 Compose a message.
- 2 In the message, click **Options** . Select the **Add digital signature to outgoing message** check box.
- 3 To modify the security options, click the **File** menu, and then click **Properties**.
- 4 Click **Send** .

**Note** To add a digital signature to all messages you send, click the **Tools** menu, click **Options**, click the **Security** tab, and then select the **Add digital signature to outgoing message** check box.




## Add security to messages






You can add two security features to the e-mail messages you send. You can sign a message with a digital signature to ensure that the message is not altered by someone else and to ensure recipients that the message came from you. And you can encrypt a message to ensure that the message and its attachments are not readable to anyone other than the recipients you select.

If you only send and receive secure messages on your Microsoft Exchange server, you obtain a keyword to your security file, or a certificate from your administrator to encrypt or digitally sign a message. In order to send a secure message, you and the recipient of the message must have set up the appropriate security options.

If you want to send and receive secure messages from recipients on the Internet, you can use certificates to sign or encrypt messages.

For more information about certificates, click 

### What do you want to do?



-  [Set up security for Internet messages](#)
-  [Set up Microsoft Exchange Server security](#)
-  [Send a message with a digital signature](#)
-  [Send an encrypted message](#)
-  [Send a secure message to an Internet recipient](#)

## **Set up Microsoft Exchange Server security for your messages**


You must have a network connection to the [Key Management server](#) to set up security.

- 1** On the **Tools** menu, click **Options**, and then click the **Security** tab.
- 2** Click **Get a Digital ID**.
- 3** Click **Set up Security for me on the Exchange Server**.
- 4** Click **OK**.
- 5** In the **Token** box, type the keyword your administrator assigned to you, for example, **NLSWQGSS**.
- 6** In the **Keyset Name** box, type your name.

## Send an encrypted message

- 1 Compose a message.
- 2 In the message, click **Options** . Select the **Encrypt contents and attachments** check box.
- 3 To modify the security options, click the **File** menu, and then click **Properties**.
- 4 Click **Send** .

### Notes

- If a recipient of the message has not set up the appropriate security options, the message cannot be sent securely.
- To encrypt all messages you send, click the **Tools** menu, click **Options**, click the **Security** tab, and then select the **Encrypt contents and attachments for outgoing messages** check box.
- If you want to send an encrypted message to an Internet recipient, you must have the recipient's digital ID. For more information about setting up security for Internet messages, click .

## Verify a digital signature

- 1 Open the message with a digital signature.
- 2 On the **File** menu, click **Properties**, and then click the **Security** tab.

**Note** If a delegate sent the message on behalf of another person, the delegate's name appears as the sender.

## **About certificates**

Certificates (digital ID's) are files which are issued by a certified security authority such as VeriSign, or from your administrator. To send a secure message over the Internet using certificates, both the sender and the receiver must have a valid certificate.

## Set up security for Internet messages

1 Get a digital ID.

 How?

2 On the **Tools** menu, click **Options**, and then click the **Security** tab.

3 Click **Change Settings**.

4 Click **Create New**.

All of the settings in the dialog box become available.

5 Enter a name in the **Security Settings Name** box.




6 In the **Secure message format** box, click **S/MIME**.

7 Select the **Send these certificates with signed messages** check box.

8 Click **Choose**, and then select your digital ID.

## About security using Microsoft Exchange Server

Outlook and Microsoft Exchange Server provide several ways to protect sensitive information from unauthorized readers.

- Sign a message with a digital signature to ensure that the message is not altered by someone else. For more information, click .
- Encrypt the body of a message to ensure that the message and its attachments are not readable to anyone other than the recipients you select. For more information, click .
- If you have given another person delegate access to any of your folders, you can hide personal information. Open each personal item, and then select the **Private** check box.
- Mark messages you send as private, personal, or confidential. Marking a message as private prevents that message from being modified. Marking a message as personal or confidential does not prevent that message from being modified.
- If you own a public folder and your e-mail system can be accessed from the World Wide Web, you can make your public folder inaccessible from the Web. For information about Web access to your e-mail system and public folders, see your administrator. For information about how to set permissions for a public folder, click .

## **Get a digital ID**

- 1** On the **Tools** menu, click **Options**, and then click the **Security** tab.
- 2** Click **Get a Digital ID**.
- 3** Select **Get a S/Mime certificate from an external Certifying Authority**.  
Outlook will start Internet Explorer and open a Web page about digital ID's.
- 4** Follow the instructions on the Web page.  
The certificate authority will send you a digital ID and instructions.



## **About sending secure messages using the Internet**

Outlook 98 includes security features that allow you to send and receive secure e-mail messages over the Internet, and prevent unauthorized access to your computer.

To send secure messages across the Internet you need a digital ID. A digital ID (also called a certificate) provides a means for proving your identity on the Internet. With a digital ID you can add a digital signature to your messages so the intended recipients can make sure that the message actually came from you and has not been tampered with. You can also encrypt messages, using a special mathematical formula, so only the intended recipient can read your messages and attachments.

You obtain your digital ID from a certifying authority, such as Verisign Inc. Your network administrator may be able to issue a digital ID. You can export your security settings to, or import them from, another computer if you want to. You can also make a backup copy of your digital ID.

To send someone an encrypted message, you need a copy of their digital ID. Have the recipient send you a digitally signed message to get a copy of their digital ID. If you reply using the signed message you received, their digital ID is stored with their address.

Security zones provide control over how much access incoming HTML e-mail messages and Web pages have to your computer. They provide advanced protection against code scripts that could gain access to your computer and replace or damage files. You can choose which security zone to place your incoming HTML e-mail messages in and select the control options for the zone. For example, you can choose to disable all scripts, Java applets, or ActiveX™ Controls in HTML messages that come from the Internet.

You can also set security levels for attachments.

## Send a secure message to an Internet recipient

1 Get a digital ID from a Certificate Authority.

 [How?](#)

2 Set up security for Internet messages.

 [How?](#)

To send an encrypted message, get a copy of the recipient's digital ID.

 [How?](#)

Compose and address the message.

3 On the **File** menu, click **Properties**, and then click the **Security** tab.

4 In the **Security setting** box, click the S/Mime security you set up in step 2.

## Move a digital ID between computers

- 1 On the **Tools** menu, click **Options**, and then click the **Security** tab.
- 2 Click **Import/Export Digital ID**.
- 3 Click **Export your Exchange or S/MIME security information**.
- 4 If the Certificate you want to move does not appear in the **Digital ID** box, click **Select**.
- 5 In the **Export File** box, type a path and a file name or click **Browse**, and then type a file name.
- 6 In the **Password** box, type a password for this digital ID.
- 7 To remove the digital ID from the computer select the **Delete Security Information Digital ID from system** check box.
- 8 Copy the security file you created in step 5 to the new computer.
- 9 On the new computer, follow steps 1 and 2.
- 10 Click **Import existing Exchange or S/MIME security information**.
- 11 Click **Browse**, and then select the file you created in step 5.
- 12 Type the password you created in step 6.
- 13 In the **Keyset** box, type your name or other identifier.

## **Make a backup copy of a digital ID**

- 1** On the **Tools** menu, click **Options**, and then click the **Security** tab.
- 2** Click **Import/Export Digital ID**.
- 3** Click **Export your Exchange or S/MIME security information**.
- 4** Click **Select**, and then choose the digital ID you want to back up.
- 5** In the **Password** box, type your password for this certificate.
- 6** Click **Browse**, and then specify the location and file name for your digital ID.

## Get a copy of an Internet recipient's digital ID

- 1** Open a message that has a digital ID attached.  
To have the sender attach their digital ID to a message, ask them to send an e-mail message to you that is digitally signed.
- 2** Right-click the name in the **From** box, and then click **Add to Contacts** on the shortcut menu.  
If you use a Personal Address book, click **Add to Personal Address book**.
- 3** If you already have an entry for this person, select **Replace existing contact**.  
The digital ID is now stored with your contact or address book entry for this recipient. You can now send them encrypted e-mail messages.

## Troubleshoot security

### What do you need help with?

- » I set security options on the **Properties** tab, but they don't work for all my messages.
- » Warnings appear when I open messages or attachments.
- » I can't send an encrypted message.
- » Signed messages display an error when I open them.
- » Why did my message format change when I sent a secure message?.

## **Warnings appear when I open messages or attachments.**

- You may need to change the security zone settings. On the **Tools** menu, click **Options**, and then click the **Security** tab. Click **Zone Settings**, and then click **Low**.
- You may need to change the setting for attachments. On the **Tools** menu, click **Options**, and then click the **Security** tab. Click **Attachment Security**, and then click **None**.
- When a secure message fails an error message appears that describes the problem. A red X will define what part of the certificate has a problem.
- You may need to change the trust levels for the sender. In the Certificate dialog box that appears, click **Edit Trust**, and then click **Explicitly trust this certificate**.
- The sender's certificate may have expired. In the Certificate dialog box that appears, click **View Certificate**. Click the **Details** tab, and then check the date next to **Valid from**.

## **Why did my message format change when I sent a secure message?**

If you are using Exchange Rich Text Format for messages, and you send a secure message that uses a S/MIME digital ID, the message format is changed to HTML in order to ensure correct processing of the Digital ID. Some rich text formatting may be lost in the conversion.



### **I can't send an encrypted message.**

You might not have a copy of the intended recipient's digital ID. To send an encrypted message to an Internet recipient, or a recipient using a certificate, you must have a copy of their digital ID stored with their address in your contact list or address book. If you have more than one entry for the recipient, you must use the one that has their digital ID.

For information about how to add a copy of the recipient's digital ID to your contact list or address book, click 

### **Signed messages display an error when I open them.**

- When a signed message that uses a certificate fails, an error message appears that describes the problem. A red X will define what part of the certificate has a problem.
- You may need to change the trust levels for the sender. In the Certificate dialog box that appears, click **Edit Trust**, and then click **Explicitly trust this certificate**.
- The sender's certificate may have expired. In the Certificate dialog box that appears, click **View Certificate**. Click the **Details** tab, and then check the date next to **Valid from**.

**I set security options on the Properties tab, but they don't work for all my messages.**

The security options on the **Properties** tab are for a single message only. To seal or digitally sign all messages that you send, click the **Tools** menu, click **Options**, click the **Security** tab, and then click the **Encrypt contents and attachments for outgoing messages** check box or the **Add digital signature to outgoing message** check box.

## Change security level for private keys

This procedure is only available if you are using a Microsoft Exchange Key Management Server.

- 1 On the **Tools** menu, click **Options**, and then click the **Security** tab.
- 2 Click **Change Settings**.
- 3 Click **Set Security Level**.
- 4 Click **OK** to delete your current security settings.
- 5 Click **Set Security Level**.
- 6 Choose a security level as follows.

<b>To do this</b>	<b>Choose</b>
Password-protect your private keys. Each time the keys are used, you will be prompted for a password.	<b>High</b>
Display a message each time the keys are used.	<b>Medium</b>
Use the keys without being prompted.	<b>Low</b>

**Note** If you choose **High** security, and select the **Remember Password** check box, your password is remembered only for 15 minutes from the last time you access your keys. If you are using Microsoft Windows NT, your password is remembered until you log off Windows NT.

## Set the security level for your private keys

Outlook will now save your private security keys. If you are creating an additional Exchange Server Security setting, you will already have a security level associated with your keys. In that case, you may be asked for confirmation before adding the root certificate. If there is no security level associated with your keys, you must choose a security level as follows:

<b>To do this</b>	<b>Choose</b>
Password-protect your private keys. Each time the keys are used, you will be prompted for a password.	<b>High</b>
Display a message each time the keys are used.	<b>Medium</b>
Use the keys without being prompted.	<b>Low</b>

The default security level is Medium. To change it, click the **Set Security Level** button.

### Setting Security Level to High

When you choose this option, you will be prompted for a password each time you access your security keys. You can associate a friendly name, such as your first name, with the password. This password is specifically for your security keys and is not the same as your logon password. If you forget your security password, you will have to get a new set of keys from your administrator.

### Storing the root certificate

When you set up security on this computer for the first time, the root certificate associated with your certificate is stored on your computer. The specifics of the certificate will be shown to you before it is added to the root store. To use your security keys successfully, the root certificate must be present on your computer. Click Yes to install the root certificate; otherwise, click No. Your security keys will not work without the root certificate.

## About user profiles and information services

### User profiles

A user profile is a group of settings that define how Outlook is set up for a particular user. For example, a profile may include access to a mailbox on Microsoft Exchange Server and specify that the Outlook Address Book appears in the Address Book dialog box. A profile can contain any number of information services.

Generally, you only need one user profile. If you occasionally need to work with a different set of information services, it may be helpful to create an additional profile to use with those services. If more than one person uses the same computer, each person should have a separate profile to keep personal items secure.

You can copy an existing user profile, rename it, and then modify it as needed to create your profile. You can have Outlook start with the same profile every time, or you can be prompted to select a profile each time you start.

### Information services


Information services are settings that make it possible to send, store, and receive messages and items and to specify where to store addresses. You can have multiple information services in a user profile.

With information services, you can control how e-mail systems address and deliver your messages and how your messages and folders are stored. You can specify the delivery location for incoming messages, the location of your Personal Address Book, and the use of any personal folder file you create. You can also set up information services to send faxes or connect to other e-mail systems.

For example, you might have the following two information services in your user profile: Microsoft Exchange Server for sending and receiving messages and a Personal Address Book for storing personal distribution lists.


Before you can use an information service, you must add it to your user profile.

## Create a user profile

- 1 Click **Start**, point to **Settings**, and then click **Control Panel**.
- 2 Double-click the **Mail** icon .
- 3 On the **Services** tab, click **Show Profiles**.
- 4 On the **General** tab, click **Add**, and then follow the instructions in the Inbox Setup Wizard.

## Add a personal folder file to a user profile

- 1 On the **Tools** menu, click **Services**.
- 2 On the **Services** tab, click **Add**.
- 3 In the **Available information services** box, click **Personal Folders**.
- 4 Click **OK**.
- 5 Specify the file name and location for your personal folder file.
- 6 Click **Open**.
- 7 In the **Name** box, enter a name for the personal folder file.
- 8 Select the options you want.  
For Help on an option, click **Help**.



**Note** To add a personal folder file to a different user profile, double-click the **Mail** icon  in Windows Control Panel. On the **Services** tab, click **Show Profiles**. On the **General** tab, click the profile you want in the **Profile** box, click **Properties**, and then perform steps 2–8 above.



## Add an Outlook Address Book to a user profile


- 1 On the **Tools** menu, click **Services**.
- 2 On the **Services** tab, click **Add**.
- 3 In the **Available information services** box, click **Outlook Address Book**.
- 4 Click **OK** twice.
- 5 Quit and restart Outlook.

### Notes

- Only entries in contacts folders that are set up to appear in the Outlook Address Book display in the Address Book dialog box. For information about how to set up a contacts folder to appear, click .
- To add an Outlook Address Book to a different user profile, double-click the **Mail** icon  in Windows Control Panel. On the **Services** tab, click **Show Profiles**. On the **General** tab, click the profile you want in the **Profile** box, click **Properties**, and then perform steps 2–5 above.


## Add a Personal Address Book to a user profile

- 1 On the **Tools** menu, click **Services**.
- 2 On the **Services** tab, click **Add**.
- 3 In the **Available information services** box, click **Personal Address Book**.
- 4 Click **OK**.
- 5 On the **Personal Address Book** tab, enter a name for the Personal Address Book in the **Name** box. In the **Path** box, enter the path of the Personal Address Book.
- 6 Click **OK** twice.
- 7 Quit and restart Outlook.


**Note** To add a Personal Address Book to a different user profile, double-click the **Mail** icon  in Windows Control Panel. On the **Services** tab, click **Show Profiles**. On the **General** tab, click the profile you want in the **Profile** box, click **Properties**, and then perform steps 2–8 above.

## Add a Microsoft Exchange Server mailbox to a user profile




- 1 On the **Tools** menu, click **Services**.
- 2 On the **Services** tab, click **Add**.
- 3 In the **Available information services** box, click **Microsoft Exchange Server**.
- 4 Click **OK**.
- 5 On the **General** tab, type the name of your server in the **Microsoft Exchange Server** box. If you do not know the name of your server, see your administrator.
- 6 In the **Mailbox** box, type the name of your mailbox. If you do not know the name of your mailbox, see your administrator.
- 7 Select the options you want.  
For Help on an option, click **Help**.
- 8 Click **OK** twice.
- 9 Quit and restart Outlook.

**Note** To add a Microsoft Exchange Server mailbox to a different user profile, double-click the Mail icon  in Windows Control Panel. On the **Services** tab, click **Show Profiles**. On the **General** tab, click the profile you want in the **Profile** box, click **Properties**, and then perform steps 2–9 above.

## Set up an information service

There are many information services provided with Microsoft Outlook. For information about the available services, click .

### What do you want to do?

-  [Set up or remove individual components of Outlook.](#)
-  [Add an information service provided with Outlook](#)
-  [Set up an information service not provided with Outlook](#)

## About information services available with Outlook

The following [information services](#) are provided with Outlook. If one of these information services has been removed, use the Outlook Setup program to set up the appropriate component:


- Internet Mail
- Microsoft Exchange Server
- Microsoft Mail
- Microsoft At Work fax software (If you already have Microsoft At Work fax software set up on your computer, the software is updated when you set up Outlook. If Microsoft At Work fax software is not set up on your computer, set up the Microsoft At Work fax software driver—from your Windows 95 disk—before you set up Outlook.)
- Microsoft Personal Fax for Windows (If Microsoft Personal Fax for Windows software is not set up on your computer, set up the software driver—from your Windows NT disks—before you set up Outlook.)
- The Microsoft Network online service (For versions of Microsoft Network prior to 2.5 use the Microsoft Network service, which is available after you set up the Microsoft Network online service. For Microsoft Network version 2.5 use the Internet Mail Information Service.)
- Lotus cc:Mail (Get the Lotus cc:Mail driver from the CD-ROM or on the network you used to set up Outlook. If you didn't set up Outlook from a CD-ROM and you have access to the [World Wide Web](#), click the **Help** menu, point to **Microsoft on the Web**, and then click **Free Stuff**.)

To set up any other information service, you must have the software of the service.


Return to [Set up an information service](#)

## Set up an information service not provided with Outlook

- 1 On the **Tools** menu, click **Services**.
- 2 On the **Services** tab, click **Add**.
- 3 Click **Have Disk**.
- 4 In the box, type the location of the Setup file for the information service.
- 5 Click **OK**.
- 6 In the **Available information services** box, click the information service.
- 7 Click **OK**.
- 8 Select the options you want.  
For Help on an option, click **Help**.
- 9 Click **OK**.
- 10 Quit and restart Outlook.


**Note** To add an information service to a different user profile, double-click the **Mail** icon  in Windows Control Panel. On the **Services** tab, click **Show Profiles**. On the **General** tab, click the profile you want in the **Profile** box, click **Properties**, and then perform steps 2–10 above.

## Delete a user profile

- 1 Click **Start**, point to **Settings**, and then click **Control Panel**.
- 2 Double-click the **Mail** icon .
- 3 On the **Services** tab, click **Show Profiles**.
- 4 On the **General** tab, click the profile you want to delete in the **Profiles** box.
- 5 Click **Remove**.

## Remove an information service

- 1 On the **Tools** menu, click **Services**.
- 2 On the **Services** tab, click the information service you want to remove in the **The following information services are set up in this profile** box.
- 3 Click **Remove**.

**Note** To delete an information service in a different user profile, double-click the **Mail** icon  in Windows Control Panel. On the **Services** tab, click **Show Profiles**. On the **General** tab, click the profile you want in the **Profile** box, click **Properties**, and then perform steps 2 and 3 above.




## Select a user profile to use when Outlook starts

- 1 On the **Tools** menu, click **Options**, and then click the **Mail Services** tab.
- 2 To specify a user profile to be used every time you start Outlook, click **Always use this profile**, and then select the profile you want.  
To be prompted to select the user profile to use each time you start Outlook, click **Prompt for a profile to be used**.
- 3 Click **OK**.
- 4 Quit and restart Outlook.


## Rename an information service

- 1 On the **Tools** menu, click **Services**.
- 2 On the **Services** tab, select the information service you want to rename in the **The following information services are set up in this profile** box.
- 3 Click **Properties**.
- 4 In the **Name** and **Full Name** boxes, type a name for the information service. If the **Name** box does not appear, you cannot change the name of the information service.

**Note** To rename an information service in a different user profile, double-click the **Mail** icon  in Windows Control Panel. On the **Services** tab, click **Show Profiles**. On the **General** tab, click the profile you want in the **Profile** box, click **Properties**, and then perform steps 2–4 above.

## Copy an information service to another user profile

- 1 On the **Tools** menu, click **Services**.
- 2 On the **Services** tab, select the information service you want to copy in the **The following information services are set up in this profile** box.
- 3 Click **Copy**.
- 4 In the **Copy to profile** box, select the user profile you want to copy the service to, and then click **OK** twice.

**Note** To copy an information service from a user profile other than the one that's active, double-click the **Mail** icon  in Windows Control Panel. On the **Services** tab, click **Show Profiles**. On the **General** tab, click the profile you want in the **Profile** box, click **Properties**, and then perform steps 2–4 above.

## **Set where e-mail messages are sent from and received**

- 1** On the **Tools** menu, click **Services**.
- 2** Click the **Delivery** tab.
- 3** In the **Deliver new mail to the following location** box, click where you want to send and receive messages.  
If you set up a computer to use Remote Mail, you must click the name of a personal folder file. If you set up a computer to use offline folders, you must click the name of your Microsoft Exchange Server mailbox.
- 4** Click **OK**.
- 5** Quit and restart Outlook.
- 6** In some cases, you will need to manually copy the contents of your Outlook folders to the new folders at the delivery location you just set.

## Set up a computer for more than one user

1 Create a user profile for each user.

 How?

2 On the **Tools** menu, click **Options**, and then click the **Mail Services** tab.

3 Click **Prompt for a profile to be used**.

4 Click **OK**.

5 Quit and restart Outlook.

6 In the **Profile Name** box, click the user profile you want to use.

## Use Outlook on a different computer on a network

1 On your primary computer, set mail to be delivered to your mailbox on the server.

» How?

2 On the other computer, create a user profile.

» How?

3 On the new computer, click the **Tools** menu, click **Options**, and then click the **Mail Services** tab.

4 Click **Prompt for a profile to be used**.

5 Click **OK**.

6 Quit and restart Outlook.

7 In the **Profile Name** box, click the user profile you want to use.

### Notes


- Some forms and views that are normally available on your primary computer may not be available on another computer.
- To work with personal folders stored on your primary computer, you must first move or copy the personal folder file to the other computer.
- If you use Microsoft Exchange Server security features, you must also copy your security file to the other computer.

## **Set the information service to check for new e-mail messages**

- 1** On the **Tools** menu, click **Options**, and then click the **Mail Services** tab.
- 2** In the **Check for new mail on** box, select the check boxes next to the services you want to check.

## Add an information service provided with Outlook

- 1 On the **Tools** menu, click **Services**.
- 2 On the **Services** tab, click **Add**.
- 3 In the **Available information services** box, click the information service you want to add.
- 4 Click **OK**.
- 5 Select the options you want.  
For Help on an option, click **Help**.
- 6 Click **OK** twice.
- 7 Quit and restart Outlook.

**Note** To add an information service to a different user profile, double-click the **Mail** icon  in Windows Control Panel. On the **Services** tab, click **Show Profiles**. On the **General** tab, click the profile you want in the **Profile** box, click **Properties**, and then perform steps 2–7 above.





