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Author and Series Editor

Administrator's Pocket Consultant

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Acknowledgments

You know you've been at this thing called writing a long time when people ask how many books you've written and you just have no idea. (This number is somewhere over 70 for those who may be wondering.) For me, it's always been about the craft of writing. I love writing, and I love challenging projects most of all. When I began my research for the original *Microsoft Exchange Server 2007 Administrator's Pocket Consultant* back in 2005, I had no idea how challenging this project would be. To say that Exchange Server 2007 is completely different from its predecessors is a considerable understatement. Exchange Server 2007 represents a massive top-to-bottom overhaul of Exchange Server, and every corner of Exchange Server has been tweaked, overhauled, or replaced entirely. In fact, I'll go so far as to say that Exchange Server 2007 seems more like an entirely different product than a new release of Exchange Server—and Exchange Server 2007 SP1 and later have even more features, which I cover in this new edition.

Exchange Server has evolved into a comprehensive messaging and collaboration platform that is completely integrated with Active Directory and fully scalable to meet the needs of the most demanding environments. What's more, just about every facet of Exchange Server 2007 is completely customizable, and many of the customizations can be performed only from the command line. With literally thousands of customizations and an extensive role-based architecture that can easily span multiple servers even in small businesses, the challenge in writing a day-to-day administrator's guide to Exchange Server 2007 lay in figuring out the best way to approach and organize the material as well as in determining the essential information so that I could provide you, the reader, with all the essential details in one portable, precise, and concise guide. With that in mind, I had to carefully review the text, making sure I organized the material appropriately, focused on the core topics, and included all the tips, tricks, and techniques you've come to expect from the pocket consultants. The result is the book you hold in your hand, which I hope you'll agree is one of the best practical, portable guides to Exchange Server 2007.

As I've stated in *Windows Vista Administrator's Pocket Consultant* and in *Microsoft Windows Command-Line Administrator's Pocket Consultant*, the team at Microsoft Press is top-notch. On this project, I worked with Karen Szall, Devon Musgrave, Maria Gargiulo, Martin DelRe, and others. Everyone was great to work with and very supportive of my unique approach to this book. Martin DelRe in particular believed in the book from the beginning and was really great to work with. Completing and publishing the book wouldn't have been possible without their help!

Unfortunately for the writer (but fortunately for readers), writing is only one part of the publishing process. Next came editing and author review. I must say, Microsoft Press has the most thorough editorial and technical review process I've seen anywhere—and

I've written a lot of books for many different publishers. John Pierce was the project editor and Becka McKay was the copy editor. I believe this was the first time I worked with John, and it turned out to be a good experience. Thank you!

I would also like to thank Lucinda Rowley and everyone else at Microsoft who has helped at many points of my writing career and been there when I needed them the most. Thank you also for shepherding my many projects through the publishing process!

Thanks also to Studio B literary agency and my agents, David Rogelberg and Neil Salkind. David and Neil are great to work with.

I hope I haven't forgotten anyone, but if I have, it was an oversight. *Honest.*;-)

Introduction

Microsoft Exchange Server 2007 Administrator's Pocket Consultant, Second Edition, is designed to be a concise and compulsively usable resource for Exchange Server 2007 administrators. This is the readable resource guide that you'll want on your desk at all times. The book covers everything you need to perform the core administrative tasks for Exchange Server 2007 with SP1 or later, whether your servers are running on Windows Server 2003 or Windows Server 2008. Because the focus is on giving you maximum value in a pocket-sized guide, you don't have to wade through hundreds of pages of extraneous information to find what you're looking for. Instead, you'll find exactly what you need to get the job done.

In short, the book is designed to be the one resource you turn to whenever you have questions regarding Exchange Server 2007 administration. To this end, the book zeroes in on daily administrative procedures, frequently used tasks, documented examples, and options that are representative although not necessarily inclusive. One of the goals is to keep the content so concise that the book remains compact and easy to navigate while at the same time ensuring that the book is packed with as much information as possible—making it a valuable resource. Thus, instead of a hefty 1,000-page tome or a lightweight 100-page quick reference, you get a valuable resource guide that can help you quickly and easily perform common tasks, solve problems, and implement advanced Exchange Server 2007 technologies such as EdgeSync subscriptions, local continuous replication, Outlook Anywhere, SMTP connectors, and Active Directory site links.

Who Is This Book For?

Microsoft Exchange Server 2007 Administrator's Pocket Consultant, Second Edition, covers the Standard and Enterprise editions of Exchange Server 2007. The book is designed for the following readers:

- Current Exchange Server 2007 administrators
- Current Windows administrators who want to learn Exchange Server 2007
- Administrators upgrading to Exchange Server 2007 from Exchange 2000
- Administrators upgrading to Exchange Server 2007 from Exchange 2003
- Administrators transferring from other messaging servers
- Managers and supervisors who have been delegated authority to manage mailboxes or other aspects of Exchange Server 2007

To pack in as much information as possible, I had to assume that you have basic networking skills and a basic understanding of e-mail and messaging servers. With this in mind, I don't devote entire chapters to explaining why e-mail systems are

needed or how they work. I don't devote entire chapters to installing Exchange Server 2007, either. I do, however, provide complete details on the components of Exchange organizations and how you can use these components to build a fully redundant and highly available messaging environment. You will also find complete details on all the essential Exchange administration tasks.

I also assume that you are fairly familiar with Windows Server. If you need help learning Windows Server, I highly recommend that you buy *Windows Server 2008 Administrator's Pocket Consultant* or *Windows Server 2008 Inside Out*.

How Is This Book Organized?

Microsoft Exchange Server 2007 Administrator's Pocket Consultant, Second Edition, is designed to be used in the daily administration of Exchange Server 2007. As such, the book is organized by job-related tasks rather than by Exchange Server 2007 features. If you are reading this book, you should be aware of the relationship between Pocket Consultants and Administrator's Companions. Both types of books are designed to be part of an administrator's library. While Pocket Consultants are the down-and-dirty, in-the trenches books, Administrator's Companions are the comprehensive tutorials and references that cover every aspect of deploying a product or technology in the enterprise.

Speed and ease of reference is an essential part of this hands-on guide. The book has an expanded table of contents and an extensive index for finding answers to problems quickly. Many other quick reference features have been added as well. These features include quick step-by-step instructions, lists, tables with fast facts, and extensive cross-references. The book is broken down into both parts and chapters.

Part I, "Exchange Server 2007 Administration Fundamentals," provides an overview of Exchange servers and Exchange clients. Chapter 1 provides an overview of Exchange Server 2007 administration concepts, tools, and techniques. Chapter 2 discusses deploying Exchange Server. Chapter 3 covers Exchange client setup and management. Chapter 4 extends the Exchange client discussion and looks at mobile Microsoft Office Outlook users as well as Exchange Active Sync, Outlook Web Access, and Outlook Anywhere. With more and more users working on the road or from home, this chapter helps ensure that you can give these mobile users the best support possible.

In Part II, "Exchange Server 2007 Administration Essentials," I cover the fundamental tasks you need for Exchange Server administration. Chapter 5 details how Exchange environments are organized, how information is stored in Exchange Server, and how Exchange Server works. The chapter also explores Exchange message queues and Exchange Server service management. Chapter 6 discusses Windows PowerShell and Exchange Management Shell, providing the essential background for using these powerful command-line environments for Exchange Server administration. Chapter 7

takes a look at creating and managing users and contacts. You'll learn all about Exchange aliases, enabling and disabling exchange mail for individual users, forwarding mail offsite, and more. Chapter 8 discusses mailbox administration, including techniques for configuring special-purpose resource mailboxes, moving mailboxes, and configuring mailbox delivery restrictions. In Chapter 9, you'll find a detailed discussion of how to use distribution groups and address lists. You'll also learn how to manage these resources. The final chapter in this part covers implementing Exchange security.

In Part III, "Server and Group Administration," I discuss advanced tasks for managing and maintaining Exchange organizations. Chapter 11 provides the essentials for managing the Exchange information store, implementing local continuous replication, managing storage groups, and using full-text indexing. Chapter 12 examines administration of mailbox and public folder databases. The chapter also covers how to recover disconnected mailboxes and deleted messaging items. Chapter 13 discusses how you can use messaging resource management to help retain messaging content that your organization may need for business or legal reasons and how to delete messages that are no longer needed. Chapter 14 looks at how you can use public folders in the enterprise.

Chapter 15 provides a comprehensive discussion of deploying and managing Hub Transport servers and Edge Transport servers. The chapter examines SMTP connectors, Active Directory sites, Active Directory links, and connecting to Exchange 2000 and Exchanged 2003 routing groups. The chapter also examines configuring EdgeSync subscriptions, journal rules, transport rules, and antispam features. Chapter 16 provides a comprehensive discussion of deploying and managing Client Access servers. The chapter examines HTTP virtual servers, POP3, IMAP4, and Outlook Anywhere. The chapter also examines configuring Exchange Server features for mobile devices including Autodiscovery, Direct Push, Exchange ActiveSync Mailbox Policy, Remote Device Wipe, Password Recovery, Direct File Access, Remote File Access, and WebReady Document Viewing.

Part IV, "Exchange Server 2007 Optimization and Maintenance," discusses optimization and maintenance. Chapter 17 discusses troubleshooting essentials as well as Exchange maintenance, monitoring, and queuing. You'll learn key techniques for using message tracking, protocol logging, and connectivity logging for troubleshooting. You'll also learn techniques for automated monitoring and managing Exchange message queues—both of which can help ensure that your Exchange organization runs smoothly. Finally, Chapter 18 details how to back up and restore Exchange Server. You'll learn key techniques that can help you reliably back up and, more important, recover Exchange Server in case of failure.

Conventions Used in This Book

I've used a variety of elements to help keep the text clear and easy to follow. You'll find code terms and listings in monospace type, except when I tell you to actually type a command. In that case, the command appears in **bold** type. When I introduce and define a new term, I put it in *italics*.

Other conventions include:

- **Notes** To provide details on a point that needs emphasis.
- **Best Practices** To examine the best technique to use when working with advanced configuration and administration concepts.
- **Cautions** To warn you of potential problems you should look out for.
- **More Info** To provide more information on the subject.
- **Real World** To provide real-world advice when discussing advanced topics.
- **Security Alerts** To point out important security issues.
- **Tips** To offer helpful hints or additional information.

I truly hope you find that *Microsoft Exchange Server 2007 Administrator's Pocket Consultant*, Second Edition provides everything you need to perform essential administrative tasks as quickly and efficiently as possible. You're welcome to send your thoughts to me at williamstanek@aol.com, or visit *http://www.williamstanek.com/*. Thank you.

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Chapter 3

Managing Microsoft Exchange Server 2007 Clients

As a Microsoft Exchange administrator, you need to know how to configure and maintain Exchange clients. With Microsoft Exchange Server 2007, you can use any mail client that supports standard mail protocols. For ease of administration, however, you'll want to choose a specific client for on-site users as a standard and supplement it with a specific client for off-site or mobile users. The on-site and off-site clients can be the same. I recommend focusing on Microsoft Windows Mail, Microsoft Office Outlook 2007, and Outlook Web Access. Each client supports a slightly different set of features and messaging protocols, and each client has its advantages and disadvantages, including the following:

- With Outlook 2007, you get a full-featured client that on-site, off-site, and mobile users can use. Outlook 2007 is part of the 2007 Microsoft Office system of applications, and is the only mail client spotlighted here that features full support for the latest messaging features in Exchange Server. Corporate and workgroup users often need its rich support for calendars, scheduling, voice mail, and e-mail management.
- With Windows Mail, you get a lightweight client that's best suited for off-site or mobile users. Windows Mail is the replacement for Outlook Express and is installed by default with Windows Vista. Although Windows Mail supports standard messaging protocols for POP3 and IMAP4, the client doesn't support HTTP mail, calendars, scheduling, voice mail, or key messaging features of Exchange Server. Windows Mail is, however, fairly easy to configure.
- With Outlook Web Access, you get a mail client that you can access securely through a standard Web browser. With Microsoft Internet Explorer 5.0 or later, Outlook Web Access supports most of the features found in Outlook 2007, including calendars, scheduling, and voice mail. With other browsers, the client functionality remains the same, but some features, such as voice mail, might not be supported. You don't need to configure Outlook Web Access on the client, and it's ideal for users who want to access e-mail while away from the office.

Outlook 2007 is the most common Exchange client for corporate and workgroup environments. With the Outlook Anywhere feature of Exchange, which eliminates the need for a virtual private network (VPN) to securely access Exchange Server over the Internet by using a remote procedure call (RPC) over Hypertext Transfer Protocol (HTTP) connection, Outlook 2007 might also be your client of choice for off-site and

mobile users. The catch with Outlook Anywhere is that the feature is not enabled by default, requires additional components, and is supported only when Exchange Server 2007 is running on Microsoft Windows Server 2003 or later releases of Windows Server.

Windows Mail and Outlook Web Access, on the other hand, aren't designed for corporate users and are really meant for off-site or mobile users. Both clients are easy to configure and require relatively little back-end configuration. In fact, you can quickly and easily configure Exchange Server to work with these clients.

This chapter shows you how to manage Outlook 2007 and Windows Mail. Chapter 4, "Managing Mobile Messaging Users," describes using Outlook 2007, Outlook Web Access, and Outlook Anywhere.

Configuring Mail Support for Outlook 2007 and Windows Mail

You can install both Outlook 2007 and Windows Mail as clients on a user's computer. The following sections look at these topics:

- Configuring Outlook 2007 and Windows Mail for the first time
- Adding Internet mail accounts to Outlook 2007 and Windows Mail
- Reconfiguring Outlook 2007 mail support
- Setting advanced mail options

Configuring Outlook 2007 for the First Time

You can install Outlook 2007 as a stand-alone product or as part of the 2007 Office system. Outlook 2007 can be used to connect to the following types of e-mail servers:

- **Microsoft Exchange Server** Connects directly to Exchange Server; best for users who are connected to the organization's local area network (LAN). Users will have full access to Exchange Server. If users plan to connect to Exchange Server using Outlook Anywhere, this is the option to choose as well. With Exchange Server, users can check mail on an e-mail server and download the mail to their inbox. They can access any private or public folders to which they have been granted permissions.
- **POP3** Connects to Exchange or another Post Office Protocol 3 (POP3) e-mail server through the Internet; best for users who are connecting from a remote location, such as a home or a remote office, using dial-up or broadband Internet access. With POP3, users can check mail on an e-mail server and download it to their inboxes. Users can't, however, synchronize mailbox folders or access private or public folders on the server. By using advanced configuration settings, the user can elect to download the mail and leave it on the server for future use.

By leaving the mail on the server, the user can check mail on a home computer and still download it to an office computer later.

- **IMAP4** Connects to Exchange or another Internet Message Access Protocol Version 4 (IMAP4) e-mail server through the Internet; best for users who are connecting from a remote location, such as a home or a remote office, using dial-up or broadband Internet access. Also well suited for users who have a single computer, such as a laptop, that they use to check mail both at the office and away from it. With IMAP4, users can check mail on an e-mail server and synchronize mailbox folders. Users can also download only message headers and then access each e-mail individually to download it. Unlike POP3, IMAP4 has no option to leave mail on the server. IMAP4 also lets users access public and private folders on an Exchange server.
- **HTTP** Connects to an HTTP e-mail server, such as MSN Hotmail, through the Internet; best as an additional e-mail configuration option. Here, users can have an external e-mail account with a Web-based e-mail service that they can check in addition to corporate e-mail.
- **Additional Server Types** Connects to a third-party mail server or other types of mail servers. If your organization has multiple types of mail servers, including Exchange Server, you'll probably want to configure a connection to Exchange Server first and then add additional e-mail account configurations later.

Unlike earlier releases of Outlook, Outlook 2007 is fairly easy to configure. To begin, log on to the computer as the user whose e-mail you are configuring. If the computer is part of a domain, you should log on using the user's domain account. If you are configuring e-mail for use with a direct Exchange Server connection rather than a POP3, IMAP4, or HTTP connection, you should ensure that the user's mailbox has been created. If the user's mailbox has not been created, auto-setup will fail, as will the rest of the account configuration.

> **Note** You can configure both Outlook 2007 and Windows Mail on the same computer. If you configure Windows Mail after configuring Outlook 2007, Windows Mail assumes you may be migrating from Outlook 2007 to Windows Mail and offers to import Outlook mail after you complete the initial e-mail setup. If you configure Outlook 2007 after configuring Windows Mail, Outlook 2007 does not offer to import mail from Windows Mail. If you want to import mail from Windows Mail or another program to Outlook 2007, you'll need to use the Import And Export Wizard, which you can start by selecting File and then clicking Import And Export.

The first time you start Outlook 2007, the application runs the Outlook 2007 Startup Wizard. You can use the Startup Wizard to configure e-mail for Exchange Server, POP3, IMAP4, and HTTP mail servers, as discussed in the sections that follow.

First-Time Configuration: Connecting to Exchange Server

You can use the Startup Wizard to configure e-mail for Exchange Server in Outlook 2007 by completing the following steps:

1. Start Outlook 2007 and click Next on the Welcome page.

   > **Note** If you've previously configured Outlook Express or Windows Mail, you'll see the E-Mail Upgrade Options page. You can then elect to upgrade from or not upgrade from Outlook Express or Windows Mail. If you elect to upgrade, Outlook 2007 will attempt to import e-mail messages, address books, and settings from the e-mail programs detected during initial setup.

2. When prompted as to whether you would like to configure an e-mail account, verify that Yes is selected, and then click Next.
3. The next page of the wizard varies depending on the computer's current configuration:
   - For computers that are part of a domain and for users that have an existing Exchange Server mailbox, the Startup Wizard uses the new Auto Account Setup feature to automatically discover the required account information, as shown in Figure 3-1.
   - For computers that are part of a domain and for users for which you have not created an Exchange mailbox, you must exit the wizard by clicking Cancel, create the user's Exchange mailbox, and then restart Outlook 2007 to restart the Startup Wizard.
   - For computers that are part of a workgroup or for which you are logged on locally, Outlook 2007 assumes that you want to configure the user to use an Internet e-mail account. You must next enter the user's account name, e-mail address, and password. Then type and confirm the user's password.
4. When you click Next, the Startup Wizard, taking advantage of the new Auto Account Setup feature, attempts to automatically discover the rest of the information needed to configure the account and then uses the settings to log on to the server. If the auto-configuration and server logon are successful, click Finish, and skip the remaining steps in this procedure. The wizard will then set up the user's Exchange mailbox on the computer as appropriate.
5. If auto-configuration is not successful, click Next so that the wizard can attempt to establish an unencrypted connection to the server. If the auto-configuration and server logon are successful this time, click Finish, and then skip the remaining steps in this procedure.

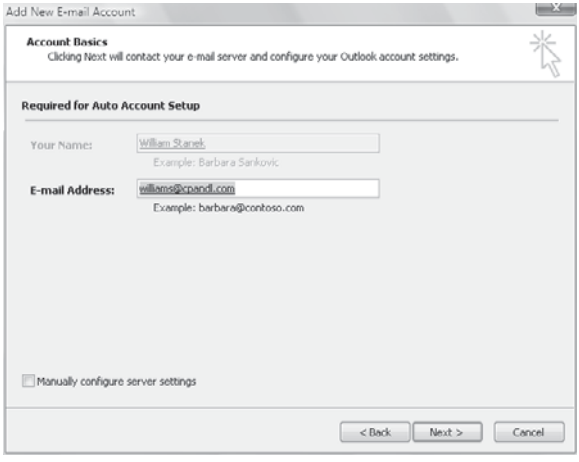

Figure 3-1 The Microsoft Outlook Startup Wizard automatically fills in your account information when you are logged on to a domain.

6. If auto-configuration fails twice, you'll see a prompt to confirm the user's e-mail address. If the e-mail address is incorrect, change it to the correct one, and then click Retry. If the auto-configuration and server logon are successful this time, click Finish, and then skip the remaining steps in this procedure.
7. If all attempts at auto-configuration fail, you can try to configure settings manually. The wizard automatically selects the Manually Configure Server Settings check box. Click Next. On the Choose E-Mail Service page, select Internet E-Mail, Microsoft Exchange, or Other. Use Other to configure Outlook 2007 to connect to the Outlook Mobile Service. Click Next. On the next wizard page, complete the necessary information for the type of e-mail service you selected. If necessary, click More Settings, and then use the Properties dialog box provided to configure the additional required settings. When you are finished, click OK to close the Properties dialog box, and then click Finish to complete the mail configuration.

First-Time Configuration: Connecting to Internet E-mail Servers

When a user is logged on to a domain, Outlook 2007 will automatically attempt to configure itself for use with the user's Exchange mailbox as part of its initial configuration. This configuration works for internal users but not for remote users who need to access Exchange using POP3 or IMAP4. For these users, you can complete the first-time configuration of Outlook 2007 by completing the following steps:

1. In the Startup Wizard, when you are prompted as to whether you would like to configure an e-mail account, verify that Yes is selected, and then click Next.
2. Select the Manually Configure Server Settings Or Additional Server Types check box, and then click Next.

3. On the Choose E-Mail Service page, select Internet E-Mail and then click Next.
4. In the Your Name text box, type the name that will appear in the From field of outgoing messages for this user, such as **William Stanek**.
5. In the E-Mail Address text box, type the e-mail address of the user. Be sure to type the e-mail user name as well as the domain name, such as **williams@cpandl.com**.
6. From the Account Type list, select the type of protocol to use for the incoming mail server as POP3, IMAP4, or HTTP. The advantages and disadvantages of these protocols are as follows:
   - POP3 is used to check mail on an e-mail server and download it to the user's inbox. The user can't access private or public folders on the server. By using advanced configuration settings, the user can elect to download the mail and leave it on the server for future use. By leaving the mail on the server, the user can check mail on a home computer and still download it to an office computer later.
   - IMAP4 is used to check mail on an e-mail server and download message headers. The user can then access each e-mail individually and download it. Unlike POP3, IMAP4 has no option to leave mail on the server. IMAP4 also lets users access public and private folders on an Exchange server. It is best suited for users who have a single computer, such as a laptop, that they use to check mail both at the office and away from it.
   - HTTP is used to check mail on a Web-based e-mail server, such as Hotmail or MSN. The user can then access e-mail through Outlook 2007 instead of through a Web browser.
7. If you select POP3 or IMAP4, you must enter the fully qualified domain name for the incoming and outgoing mail servers. Although these entries are often the same, some organizations have different incoming and outgoing mail servers. If you are not certain of your mail servers' fully qualified domain names, contact your network administrator.

   Note If you're connecting to Exchange with POP3 or IMAP4, enter the fully qualified domain name for the Exchange server instead of the host name. For example, you would use MailServer.cpandl.com instead of MailServer.

8. If you select HTTP, a server URL is required. With Hotmail or MSN, the required URL is entered for you. With other services, you must enter the required URL.
9. Under Logon Information, type the user's log on name and password. If the mail server requires secure logon, select the Require Logon Using Security Password Authentication check box.

10. To verify the settings, click Test Account Settings. Outlook 2007 will then send a test message to the specified mail server. If the test fails, note the errors and make corrections as necessary.

11. If necessary, click More Settings, and then use the Properties dialog box provided to configure the additional required settings. When you are finished, click Next, and then click Finish to complete the configuration. If other e-mail applications are configured on the computer, the Windows Mail Import Wizard is started and you have the option of importing the user's messages and address book.

Configuring Windows Mail for the First Time

Windows Mail is installed with Windows Vista. It runs the Internet Connection Wizard the first time you start the application. You configure the user's Internet connection for startup by completing the following steps:

1. In the Display Name text box, type the name that will appear in the From field of outgoing messages for this user, such as **William Stanek**. Click Next.

2. Type the e-mail address of the user. Be sure to type the e-mail user name as well as the domain name, such as **williams@cpandl.com**. Click Next.

3. As shown in Figure 3-2, select the type of protocol to use for the incoming mail server as POP3 or IMAP4. The advantages and disadvantages of these protocols are as follows:

   - POP3 is used to check mail on an e-mail server and download it to the user's inbox. The user can't access private or public folders on the server. By using advanced configuration settings, the user can elect to download the mail and leave it on the server for future use. By leaving the mail on the server, the user can check mail on a home computer and still download it to an office computer later.

   - IMAP4 is used to check mail on an e-mail server and download message headers. The user can then access each e-mail individually and download it. Unlike POP3, IMAP4 has no option to leave mail on the server. IMAP4 also lets users access public and private folders on an Exchange server. It is best suited for users who have a single computer, such as a laptop, that they use to check mail both at the office and away from it.

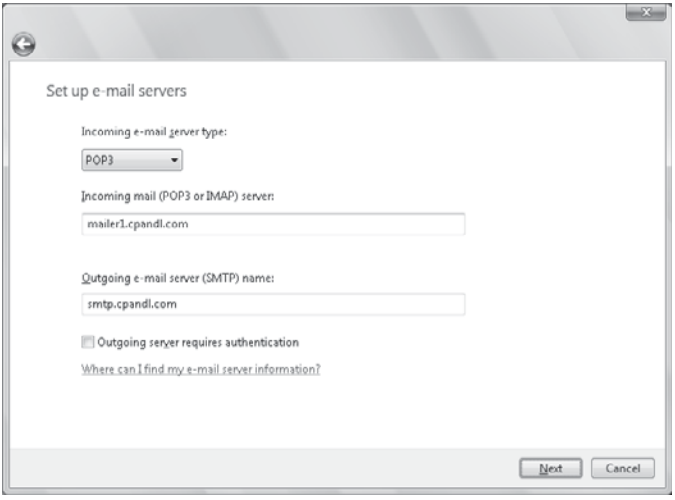

Figure 3-2 Specify incoming and outgoing mail server options with the Internet Connection Wizard.

4. If you select POP3 or IMAP4, you must enter the fully qualified domain name for the incoming and outgoing mail servers. Although these entries are often the same, some organizations have different incoming and outgoing mail servers. If you are not certain of your mail servers' fully qualified domain names, contact your network administrator.

   Note If you're connecting to Exchange with POP3 or IMAP4, enter the fully qualified domain name for the Exchange server instead of the host name. For example, you would use MailServer.cpandl.com instead of MailServer.

5. If the mail server requires a user name and password when a user sends mail in addition to when a user retrieves mail, select the Outgoing Server Requires Authentication check box. Click Next.

   Note To enhance security, most mail servers should require a user name and password for both sending and receiving mail. If a password isn't required for sending mail, the mail server may be vulnerable to exploitation.

6. On the Internet Mail Logon page, type the account name and password for the user for logging on to the POP3 or IMAP4 server, or have the user type this information. The account name is usually the same as the e-mail user name. For some mail servers, however, you might need to enter the name of the domain as well. You type this information in the form: *domain**e-mail_alias*, such as **technology\williams**. In some cases, you might need to type this information in the form: *domain/e-mail_alias*, such as **technology/williams**.

7. Click Next, and then click Finish to complete the configuration. If other e-mail applications are configured on the computer, the Windows Mail Import Wizard is started and you have the option of importing the user's messages and address book.

Configuring Outlook 2007 for Exchange

If you didn't configure Outlook 2007 to use Exchange Server the first time it was started, don't worry: You can change the Outlook 2007 configuration to use Exchange. It does take a bit of extra work, however.

To get started, you should close Outlook 2007, if it is started, and then follow these steps to configure Outlook 2007 to use Exchange:

1. Start the Mail utility. Click Start, and then click Control Panel. In Control Panel, click Classic View and then double-click Mail. If you are using a 64-bit operating system, the Mail utility is listed under the 32-bit Control Panel. In Control Panel, click Classic View, double-click 32-Bit Control Panel, and then double-click Mail.
2. In the Mail Setup–Outlook dialog box, click E-Mail Accounts. The Accounts Settings dialog box appears.
3. In the Account Settings dialog box, the E-Mail tab is selected by default. Click New.
4. On the Choose E-Mail Service page, select Microsoft Exchange, POP3, IMAP, Or HTTP and then click Next.
5. Follow steps 3–7 outlined previously in the section of this chapter entitled "First-Time Configuration: Connecting to Exchange Server."
6. When you finish the previous procedure, close the Mail Setup–Outlook dialog box, and then start Outlook 2007. If you elected to use a local copy of the user's mailbox (as per the default configuration), Outlook 2007 begins creating this local copy. The creation process can take several minutes.

Adding Internet Mail Accounts to Outlook 2007 and Windows Mail

Through e-mail account configuration, Outlook 2007 supports only one Exchange Server account at a time. If you need access to multiple Exchange mailboxes, you must configure access to these mailboxes as discussed in the section "Accessing Multiple Exchange Server Mailboxes" later in the chapter.

Although you can configure only one Exchange e-mail account at a time, both Outlook 2007 and Windows Mail allow you to retrieve mail from multiple Internet servers. For example, you could configure Outlook 2007 to check mail on the corporate Exchange server, a personal account on Earthlink, and a personal account on MSN Hotmail.

Adding Internet Mail Accounts in Outlook 2007

You add Internet mail accounts to Outlook 2007 by completing the following steps:

1. Display the Account Settings dialog box by selecting Tools and then selecting Account Settings.
2. In the Account Settings dialog box, the E-Mail tab is selected by default. Click New.
3. On the Choose E-Mail Service page, select Microsoft Exchange, POP3, IMAP, Or HTTP and then click Next.
4. Follow steps 2–11 outlined previously in the section of this chapter entitled "First-Time Configuration: Connecting to Internet E-mail Servers."

Adding Internet Mail Accounts in Windows Mail

With Windows Mail, you add Internet mail accounts by completing the following steps:

1. On the Tools menu, click Accounts. In the Internet Accounts dialog box, click Add.
2. Select E-Mail Account as the account type, and then click Next.
3. Follow the steps outlined previously in the section of this chapter entitled "Configuring Windows Mail for the First Time."

Repairing and Changing Outlook 2007 Mail Accounts

When you first configure Outlook 2007 on a computer, you can configure it to connect to an Exchange Server, Internet e-mail, or other e-mail server. With Exchange Server, the underlying Mailbox server is transparent to users—they are connected automatically to the appropriate Mailbox server. If a user's mailbox is moved to a different server within the Exchange organization, the user is connected to this server automatically the next time he or she starts Outlook 2007. If, for some reason, a user has a problem connecting to Exchange Server or needs to get updated configuration settings, you can accomplish this with a repair operation. Repairing the user's account restarts the Auto Account Setup feature.

With non-Exchange servers, access to e-mail very much depends on the account and server configuration remaining the same. If the account or server configuration changes, the account configuration in Outlook 2007 must be updated. The easiest way to do this is with a repair operation.

To start a repair, follow these steps:

1. Log on as the domain account of the user for which you are repairing e-mail.
2. In Outlook 2007, display the Account Settings dialog box by selecting Tools, and then selecting Account Settings.
3. In the Account Settings dialog box, the E-Mail tab lists all currently configured e-mail accounts by name. Select the account to repair, and then click Repair.

4. On the Auto Account Setup page, check the account settings. With Exchange accounts for domain users, you cannot change the displayed information. With other accounts, you can modify the user's e-mail address and password, which may be necessary.
5. When you click Next, the Repair E-Mail Account Wizard will contact the mail server and try to determine the correct account settings. If the auto-configuration and server logon are successful, click Finish. Skip the remaining steps in this procedure.
6. If auto-configuration is not successful, click Next so that the wizard can attempt to establish an unencrypted connection to the server. If the auto-configuration and server logon are successful this time, click Finish, and then skip the remaining steps in this procedure.
7. If auto-configuration fails twice, you can try to configure settings manually. Select the Manually Configure Settings check box, and then click Next.
8. Use the fields provided to update the mail account configuration. If you need to configure additional settings beyond the user, server, and logon information, click More Settings, and then use the Properties dialog box provided to configure the additional required settings. When you are finished, click OK to close the Properties dialog box.
9. Check the new settings by clicking Test Account Settings.
10. Click Next, and then click Finish.

In some cases, if you've incorrectly configured Exchange, you might not be able to start Outlook 2007 and access the Account Settings dialog box. In this case, you can repair the settings using the following procedure:

1. Start the Mail utility. Click Start, and then click Control Panel. In Control Panel, click Classic View and then double-click Mail. If you are using a 64-bit operating system, the Mail utility is listed under the 32-Bit Control Panel. In Control Panel, click Classic View, double-click 32-Bit Control Panel and then double-click Mail.
2. In the Mail Setup–Outlook dialog box, click E-Mail Accounts. The Accounts Settings dialog box appears.
3. In the Account Settings dialog box, the E-Mail tab is selected by default. Click the incorrectly configured Exchange account and then do the following:
   - ❑ Click Change to modify the Exchange settings using the techniques discussed previously.
   - ❑ Click Remove to remove the Exchange settings so that they are no longer used by Outlook 2007.
4. When you are finished, close the Mail Setup–Outlook dialog box, and then start Outlook 2007.

For POP3, IMAP4, and HTTP, you can change a user's e-mail configuration at any time by completing the following steps:

1. In Outlook 2007, display the Account Settings dialog box by selecting Tools, and then selecting Account Settings.
2. In the Account Settings dialog box, the E-Mail tab lists all currently configured e-mail accounts by name. Select the account you want to work with, and then click Change.
3. Use the fields provided to update the mail account configuration. If you need to configure additional settings beyond the user, server, and logon information, click More Settings, and then use the Properties dialog box provided to configure the additional required settings. When you are finished, click OK to close the Properties dialog box.
4. Check the new settings by clicking Test Account Settings.
5. Click Next, and then click Finish.

Leaving Mail on the Server with POP3

If the user connects to an Internet e-mail server, an advantage of POP3 is that it lets the user leave mail on the server. By doing this, the user can check mail on a home computer and still download it to an office computer later.

Leaving Mail on the Server: Outlook 2007

With Outlook 2007, you can configure POP3 accounts to leave mail on the server by completing the following steps:

1. Start Outlook 2007. Then, on the Tools menu, click Account Settings.
2. In the Account Settings dialog box, select the POP3 mail account you want to modify, and then click Change.
3. Click More Settings to display the Internet E-Mail Settings dialog box.
4. In the Internet E-Mail Settings dialog box, click the Advanced tab, as shown in Figure 3-3.

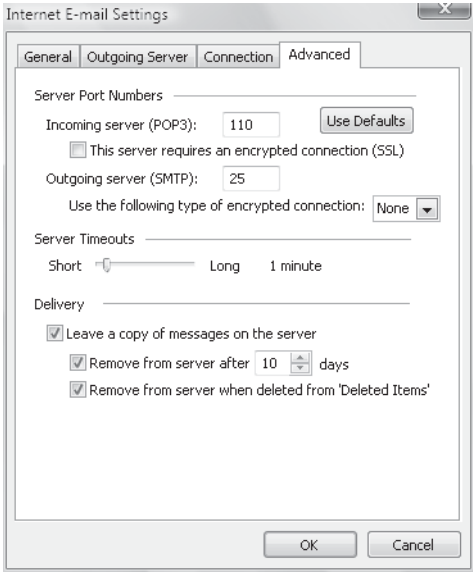

Figure 3-3 Use the Advanced tab to configure how and when mail should be left on the server.

5. Use the options below Delivery to configure how and when mail should be left on the server. To enable this option, select the Leave A Copy Of Messages On The Server check box. The additional options depend on the client configuration. Options you might see include the following:

   - **Remove From Server After *N* Days** Select this option if you're connecting to an Internet service provider (ISP) and want to delete messages from the server after a specified number of days. By deleting ISP mail periodically, you ensure that your mailbox size doesn't exceed your limit.
   - **Remove From Server When Deleted From "Deleted Items"** Select this option to delete messages from the server when you delete them from the Deleted Items folder. You'll see this option with Internet-only Outlook 2007 configurations.

6. Click OK when you've finished changing the account settings.
7. Click Next, and then click Finish. Click Close to close the Account Settings dialog box.

Leaving Mail on the Server: Windows Mail

With Windows Mail, you can configure POP3 accounts to leave mail on the server by completing the following steps:

1. Start Windows Mail. Then, on the Tools menu, click Accounts.
2. Select the POP3 mail account you want to modify, and then click Properties.
3. In the Properties dialog box, click the Advanced tab.
4. Use the options below Delivery to configure how and when mail should be left on the server. To enable this option, select Leave A Copy Of Messages On The Server. The additional options depend on the client configuration. Options you might see include the following:
   - **Remove From Server After *N* Days** Select this option if you're connecting to an ISP and want to delete messages from the server after a specified number of days. By deleting ISP mail periodically, you ensure that your mailbox size doesn't exceed your limit.
   - **Remove From Server When Deleted From "Deleted Items"** Select this option to delete messages from the server when you delete them from the Deleted Items folder. You'll see this option with Internet-only Outlook 2007 configurations.
5. Click OK, and then click Close.

Checking Private and Public Folders with IMAP4 and UNIX Mail Servers

With IMAP4, you can check public and private folders on a mail server. This option is enabled by default, but the default settings might not work properly with UNIX mail servers.

Checking Folders: Outlook 2007

With Outlook 2007, you can check or change the folder settings used by IMAP4 by completing the following steps:

1. Start Outlook 2007. Then, on the Tools menu, click Account Settings.
2. In the Account Settings dialog box, select the IMAP4 mail account you want to modify, and then click Change.
3. Click More Settings to display the Internet E-Mail Settings dialog box.
4. In the Internet E-mail Settings dialog box, click the Advanced tab, as shown in Figure 3-4.

5. If the account connects to a UNIX mail server, enter the path to the mailbox folder on the server, such as **~williams/mail**. Don't end the folder path with a forward slash (/), and then click OK.
6. Click Next, and then click Finish.

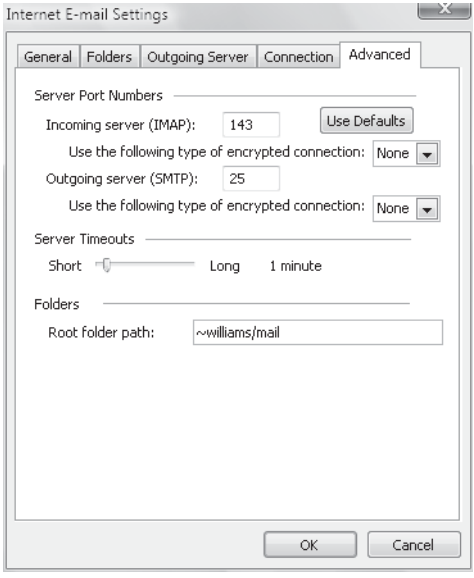

Figure 3-4 Use the Advanced tab to configure how folders are used with IMAP4 mail accounts.

Checking Folders: Windows Mail

With Windows Mail, you can check or change the folder settings used by IMAP4 by completing the following steps:

1. Start Windows Mail. Then, on the Tools menu, click Accounts.
2. Select the IMAP4 mail account you want to modify, and then click Properties.
3. In the Properties dialog box, select the IMAP4 tab.
4. If the account connects to a UNIX mail server, enter the path to the mailbox folder on the server, such as **~williams/mail**. Don't end the folder path with a forward slash (/).
5. To automatically check for new messages in all public, private, and hidden folders, make sure the Check For New Messages In All Folders check box is selected.

6. To store sent items, draft messages, deleted items, and junk e-mail on the IMAP4 server, select the Store Special Folders On IMAP4 Server check box, and then type the name for these folders. The default names are Sent Items, Drafts, Deleted Items, and Junk E-Mail, respectively.
7. Click OK, and then click Close.

Managing the Exchange Server Service in Outlook 2007

Whenever you use Outlook 2007 to connect to Exchange Server, you can use the Exchange Server Service to optimize the way mail is handled. This service has many advanced configuration and management options, including those for the following:

- E-mail delivery and processing
- Remote mail
- Scheduled connections
- Multiple mailboxes

Each of these options is examined in the sections that follow.

Managing Delivery and Processing E-Mail Messages

When Outlook 2007 uses Exchange Server, you have strict control over how e-mail is delivered and processed. Exchange mail can be delivered in one of three ways:

- Server mailboxes
- Server mailboxes with local copies
- Personal folders

Exchange mail can be processed by any of the information services configured for use in Outlook 2007. These information services include the following:

- Microsoft Exchange
- Internet e-mail

Let's look at how you use each of these delivery and processing options.

Using Server Mailboxes

Server mailboxes are the default configuration option. With server mailboxes, new e-mail is delivered to a mailbox on the Exchange server, and you can view or receive new mail only when you're connected to Exchange. Server mailboxes are best suited for corporate users with dedicated connections and users who can remotely access Exchange through a dial-up connection or through Outlook Anywhere (RPC over HTTP).

With server mailboxes, you have the option of storing a local copy of e-mail on the user's computer in addition to the e-mail stored on Exchange Server, or you can store

e-mail only on the Exchange server. The default configuration is to use a local copy of the user's mailbox. In most cases, this is a good configuration. You might want to change this configuration if the user's computer has limited hard disk space or if the user doesn't have a dedicated computer. Another reason for changing this configuration is if the user makes use of multiple computers for e-mail and you don't want local copies of mail stored on several different computers.

Changing the configuration doesn't necessarily mean storing e-mail only on the server. Three caching configurations are available:

- **Download Full Items** Downloads the full text of a message, including the header, body, and attachments, at the same time. All messages are fully cached on the user's computer for possible offline use. This option is best when a user is connected directly to the LAN or has a continuous remote access connection over dial-up, wireless, or broadband.
- **Download Headers And Then Full Items** Downloads all message headers first and then full items. When a user opens a message, the message body and any attachments are downloaded. The message is then fully cached on the user's computer for possible offline use. This option lets users quickly see all message headers without having to download the full message text.
- **Download Headers** Downloads only message headers. When a user opens a message, the message body is retrieved. If a user tries to open a message attachment, the attachment is retrieved at that time. Only message headers are cached. The message body and attachments are not cached. Use this option when the user has an unreliable or slow connection.

With any of these caching options, you can also select On Slow Connections Download Only Headers. This additional option downloads only message headers when a slow link is detected. The full item is downloaded when opened. Whether the item is stored depends on the other caching options selected in combination with this option.

> **Tip** You can think of local copies as mirror images of the user's mailbox on Exchange Server. Local copies of Exchange mailboxes are stored in .ost files. With Windows Vista, the default location of an .ost file is *%LocalAppData%*\Microsoft\Outlook, where *%LocalAppData%* is a user-specific environment variable that points to a user's local application data.

When caching is enabled, you can easily change the caching options by following these steps:

1. Start Outlook 2007. Click File, and then click Cached Exchange Mode.
2. Select the caching option you want to use. You can select only one caching option at a time.
3. To add slow-link detection and handling, select On Slow Connections Download Only Headers.

To configure how server mailboxes and local copies of server mailboxes are used, complete the following steps:

1. Log on as the user for whom you are configuring e-mail.
2. Start Outlook 2007. Then, on the Tools menu, click Account Settings. The Account Settings dialog box appears.
3. Select the Exchange mail account you want to modify, and then click Change. This starts the Change E-Mail Account Wizard.
4. If the user should store e-mail only on the server, clear the Use Cached Exchange Mode check box. Otherwise, if the user should store e-mail on the server and cache mail locally, select the Use Cached Exchange Mode check box.
5. Click Next, and then click Finish.

Using Personal Folders

An alternative to using server mailboxes is to use personal folders. Personal folders are stored in a file on the user's computer. With personal folders, mail delivered to the user's inbox is no longer stored on the server. Users have personal folders when Outlook 2007 is configured to use Internet e-mail or other e-mail servers. Users might also have personal folders if the auto-archive feature is used to archive messages.

> **Real World** Personal folders are stored in .pst files. With Windows Vista, the default location of a .pst file is *%LocalAppData%*\Microsoft\Outlook, where *%LocalAppData%* is a user-specific environment variable that points to a user's local application data. Personal folders are best suited for mobile users who check mail through dial-up connections and who might not be able to use a dial-up connection to connect directly to Exchange.
>
> Users with personal folders lose the advantages that server-based folders offer—namely, single-instance storage and the ability to have a single point of recovery in case of failure. In addition, .pst files have many disadvantages. They get corrupted more frequently and, on these occasions, you must use the Inbox Repair Tool to restore the file. If the hard disk on a user's computer fails, you can recover the mail only if the .pst file has been backed up. Unfortunately, most workstations aren't backed up regularly (if at all), and the onus of backing up the .pst file falls on the user, who might or might not understand how to do this.

Determining the Presence of Personal Folders You can determine the presence of personal folders by following these steps:

1. Start Outlook 2007. On the Tools menu, click Account Settings.
2. In the Account Settings dialog box, click the Data Files tab.
3. The location of the data file associated with each e-mail account is listed. If the file name ends in .pst, the account is using a personal folder.

Creating New or Opening Existing Personal Folders If personal folders aren't available and you want to configure them, follow these steps:

1. Start Outlook 2007. On the Tools menu, click Account Settings.
2. In the Account Settings dialog box, click the Data Files tab.
3. Click Add. The New Outlook Data File dialog box appears.
4. Office Outlook Personal Folders File (.pst) should be selected by default. Click OK, and the Create Or Open Outlook Data File dialog box appears, as shown in Figure 3-5.

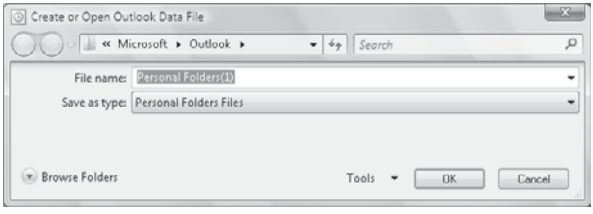

Figure 3-5 Use the Create Or Open Outlook Data File dialog box to search for an existing .pst file or to create a new one.

5. You can now create a new .pst file or open an existing .pst file:
   - To create a new .pst file in the default folder, type the file name in the text box provided, and then click OK. In the Create Microsoft Personal Folders dialog box, specify a password, verify a password for the .pst file, and click OK.
   - To create a new .pst file in a nondefault folder, click Browse Folders to expand the dialog box. Browse for the folder you want to use, type the file name in the text box provided, and then click OK. In the Create Microsoft Personal Folders dialog box, specify a password, verify a password for the .pst file, and click OK.
   - To open an existing .pst file, click Browse Folders to expand the dialog box. Browse to the folder containing the .pst file. Select the .pst file, and then click OK. In the Personal Folders dialog box, you can use the options provided to change the current password or compact the personal folder, and then click OK.

   Note It is important to be aware that Exchange Server does not ship with any password recovery utility for .pst files. If a user sets a password on a .pst file and forgets it, the Exchange administrator has no way to reset it. You might find third-party vendors who make password-cracking or recovery tools, but they are not guaranteed to work and they are not supported by Microsoft.

6. Click Close. The personal folder you've selected or created is displayed in the Outlook 2007 folder list. You should see related subfolders as well.

Delivering Mail to Personal Folders When you deliver mail to a personal folder, Outlook 2007 saves e-mail messages only locally on your computer. As a result, Outlook 2007 removes the messages from Exchange Server and you can access the messages only on the currently logged-on computer. If you want mail to be delivered to a personal folder, complete the following steps:

1. Start Outlook 2007. On the Tools menu, click Account Settings.
2. In the Account Settings dialog box, click the Data Files tab.
3. Select the .pst file to use in the list of data files provided, and then click Set As Default.
4. When prompted to confirm, click Yes. Click Close.
5. Exit and restart Outlook 2007. Outlook 2007 will now use personal folders.

If you want mail to resume using server-stored mail, complete the following steps:

1. Start Outlook 2007. On the Tools menu, click Account Settings.
2. In the Account Settings dialog box, click the Data Files tab.
3. Select the .ost file to use in the list of data files provided, and then click Set As Default.
4. When prompted to confirm, click OK. Click Close.
5. Exit and restart Outlook 2007. Outlook 2007 will now use personal folders.

Backing Up Personal Folders The Personal Folders Backup Tool is available as a free download on the Microsoft Office Online Web site. Be sure to exit Outlook 2007 before installing this tool. After you download and install this backup tool, you can back up a user's personal folders by completing the following steps:

1. Log on as the user, and then start Outlook 2007.
2. In Outlook 2007, on the File menu, click Backup.
3. Click Options. Select the check boxes for the personal folders you want to back up.
4. Click Browse. Navigate to the location where you want to save the backup, and then click Open.
5. To remind users to create personal folder backups, select the Remind Me To Backup Every ... Days check box, specify the reminder interval, and then click OK.
6. Click Save Backup.
7. Exit Outlook 2007 so that the backup process can begin.

Restoring Backed Up Personal Folder Data After you've created a backup of a personal folder, you can recover any backed up messages or data by following these steps:

1. In Outlook 2007, open the .pst file as discussed in "Creating New or Opening Existing Personal Folders."

2. Drag messages or data entries from the backup personal folder to the current personal folder. You'll restore the selected items.

To recover the entire .pst file from backup, follow these steps:

1. In Outlook 2007, on the Tools menu, click Account Settings.
2. In the Account Settings dialog box, click the Data Files tab. Write down the name and folder location of the damaged .pst file.
3. Exit Outlook 2007.
4. In Windows Explorer, rename the damaged .pst file.
5. In Windows Explorer, copy the backup .pst file to the folder containing the original .pst file.
6. In Windows Explorer, give the backup .pst file the original name of the .pst file.
7. Restart Outlook 2007.

Accessing Multiple Exchange Server Mailboxes

Earlier in the chapter, I discussed how users could check multiple Internet mail accounts in Outlook 2007. You might have wondered whether users could check multiple Exchange mailboxes as well—and they can. Users often need to access multiple Exchange mailboxes for many reasons:

- Help desk administrators might need access to the help desk mailbox in addition to their own mailboxes.
- Managers might need temporary access to the mailboxes of subordinates who are on vacation.
- Mailboxes might need to be set up for long-term projects and project members need access to those mailboxes.
- Resource mailboxes might need to be set up for accounts payable, human resources, corporate information, and so on.

Normally, a one-to-one relationship exists between user accounts and Exchange mailboxes. You create a user account and assign a mailbox to it; only this user can access the mailbox directly through Exchange. To change this behavior, you must do the following:

1. Log on to Exchange as the owner of the mailbox.
2. Delegate access to the mailbox to one or more additional users.
3. Have users with delegated access log on to Exchange and open the mailbox.

The sections that follow examine each of these steps in detail.

Logging On to Exchange as the Mailbox Owner

Logging on to Exchange as the mailbox owner allows you to delegate access to the mailbox. Before you can do this, however, you must complete the following steps:

1. Create a domain user account for the mailbox, if one doesn't already exist.
2. Log on as the user. You'll need to know the account name and password for the domain.
3. Start Outlook 2007. Make sure that mail support is configured to use Exchange Server. If necessary, configure this support, which creates the mail profile for the user.
4. After you configure Outlook 2007 to use Exchange Server, you should be able to log on to Exchange Server as the mailbox owner.

Tip With multiple mailbox users, you should configure the mailbox to deliver mail to the server rather than to a personal folder. In this way, the mail is available to be checked by one or more mailbox users.

Delegating Mailbox Access

After you've logged on as the mailbox owner, you can delegate access to the mailbox by completing these steps:

1. In Outlook 2007, on the Tools menu, click Options. On the Delegates tab, click Add.
2. The Add Users dialog box appears, as shown in Figure 3-6. To add users, double-click the name of a user who needs access to the mailbox. Repeat this step as necessary for other users, and then click OK when you're finished.
3. In the Delegate Permissions dialog box, assign permissions to the delegates for the Calendar, Tasks, Inbox, Contacts, Notes, and Journal items. The available permissions are as follows:
   - **None** No permissions
   - **Reviewer** Grants read permission only
   - **Author** Grants read and create permissions
   - **Editor** Grants read, create, and modify permissions

Note If the user needs total control over the mailbox, you should grant the user Editor permission for all items.

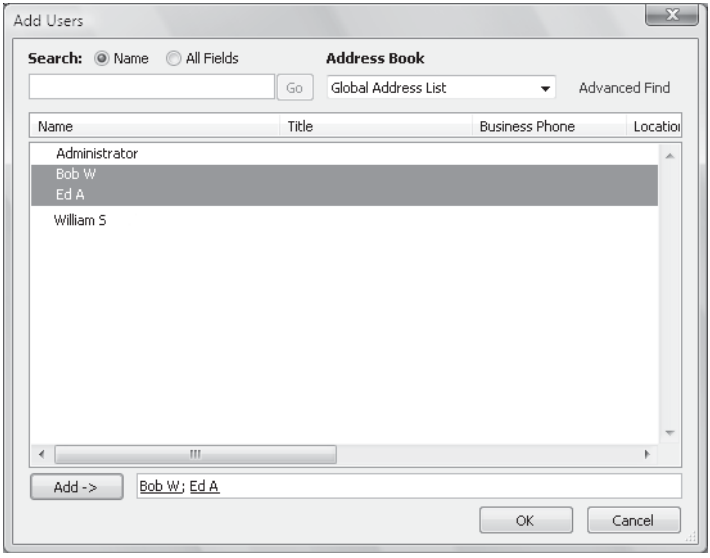

Figure 3-6 Use the Add Users dialog box to delegate access to mailboxes.

4. Click OK twice. These changes take place when the user restarts Outlook 2007.
5. Delegated users can access the mailbox and send mail on behalf of the mailbox owner. To change this behavior, set folder permissions as described in the section of this chapter entitled "Granting Permission to Access Folders Without Delegating Access."

Opening Additional Exchange Mailboxes

The final step is to let Exchange Server know about the additional mailboxes the user wants to open. To do this, follow these steps:

1. Have the user who wants access to additional mailboxes log on and start Outlook 2007.
2. In Outlook 2007, on the Tools menu, click Account Settings.
3. Select the Microsoft Exchange Server account, and then click Change.
4. Click More Settings to display the Microsoft Exchange Server dialog box.
5. In the Change E-Mail Account Wizard, click More Settings.
6. In the Microsoft Exchange dialog box, on the Advanced tab, click Add. Then type the name of a mailbox to open. Generally, this is the same as the mail alias for the user or account associated with the mailbox. Click OK, repeat this step to add other mailboxes, and click OK again.

7. Click Next, and then click Finish.
8. Click Close. The additional mailboxes are displayed in the Outlook 2007 folder list.

Granting Permission to Access Folders Without Delegating Access

When a mailbox is stored on the server, you can grant access to individual folders in the mailbox. Granting access in this way allows users to add the mailbox to their mail profiles and work with the folder. Users can perform tasks only for which you've granted permission.

To grant access to folders individually, follow these steps:

1. Right-click the folder for which you want to grant access, and then select Change Sharing Permissions. This displays the Permissions tab, as shown in Figure 3-7.

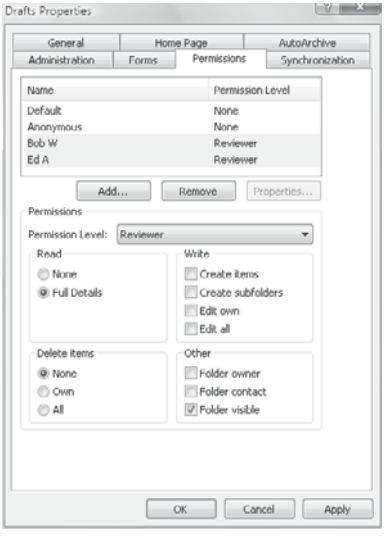

Figure 3-7 Grant access to a folder through the Permissions tab.

2. The Name and Permission Level lists display account names and their permissions on the folder. Two special names might be listed:
   - **Default** Provides default permissions for all users
   - **Anonymous** Provides permissions for anonymous users, such as those who anonymously access a published public folder through the Web

3. If you want to grant users permission that differs from the default permission, click Add.
4. In the Add Users dialog box, double-click the name of a user who needs access to the mailbox. Click Add to put the name in the Add Users list. Repeat this step as necessary for other users, and click OK when finished.
5. In the Name and Role lists, select one or more users whose permissions you want to modify. Afterward, use the Roles list to assign permissions or select individual permission items. The roles are defined as follows:
   - **Owner** Grants all permissions in the folder. Users with this role can create, read, modify, and delete all items in the folder. They can create subfolders and change permissions on folders as well.
   - **Publishing Editor** Grants permission to create, read, modify, and delete all items in the folder. Users with this role can create subfolders as well.
   - **Editor** Grants permission to create, read, modify, and delete all items in the folder.
   - **Publishing Author** Grants permission to create and read items in the folder, to modify and delete items the user created, and to create subfolders.
   - **Author** Grants permission to create and read items in the folder and to modify and delete items the user created.
   - **Nonediting Author** Grants permission to create and read items in the folder.
   - **Reviewer** Grants read-only permission.
   - **Contributor** Grants permission to create items but not to view the contents of the folder.
   - **None** Grants no permission in the folder.
6. When you're finished granting permissions, click OK.

Using Mail Profiles to Customize the Mail Environment

The mail profile used with Outlook 2007 determines which information services are available and how they are configured. A default mail profile is created when you install and configure Outlook 2007 for the first time. This mail profile is usually called Outlook.

The active mail profile defines the service setup for the user who is logged on to the computer. You can define additional profiles for the user as well. You can use these

additional profiles to customize the user's mail environment for different situations. Here are two scenarios:

- A manager needs to check the Technical Support and Customer Support mailboxes only on Mondays when she writes summary reports. On other days, the manager doesn't want to see these mailboxes. To solve this problem, you create two mail profiles: Support and Standard. The Support profile displays the manager's mailbox as well as the Technical Support and Customer Support mailboxes. The Standard profile displays only the manager's mailbox. The manager can then switch between these mail profiles as necessary.
- A laptop user wants to check Exchange mail directly while connected to the LAN. When at home, the user wants to use remote mail with scheduled connections. On business trips, the user wants to use Simple Mail Transfer Protocol (SMTP) and POP3. To solve this problem, you create three mail profiles: On-Site, Off-Site, and Home. The On-Site profile uses the Exchange Server service with a standard configuration. The Off-Site profile configures Exchange Server for remote mail and scheduled connections. The Home profile doesn't use the Exchange information service and uses the Internet mail service instead.

Common tasks you'll use to manage mail profiles are examined in the sections that follow.

Creating, Copying, and Removing Mail Profiles

You manage mail profiles through the Mail utility. To access this utility and manage profiles, follow these steps:

1. Start the Mail utility. Click Start, and then click Control Panel. In Control Panel, click Classic View and then double-click Mail. If you are using a 64-bit operating system, the Mail utility is listed under the 32-bit Control Panel. In Control Panel, click Classic View, double-click 32-Bit Control Panel, and then double-click Mail.
2. In the Mail Setup–Outlook dialog box, click Show Profiles.
3. As Figure 3-8 shows, you should see a list of mail profiles for the current user. Mail profiles for other users aren't displayed. You can now perform the following actions:
   - Click Add to create a new mail profile using the Account Settings Wizard.
   - Delete a profile by selecting it and clicking Remove.
   - Copy an existing profile by selecting it and clicking Copy.
   - View a profile by selecting it and clicking Properties.

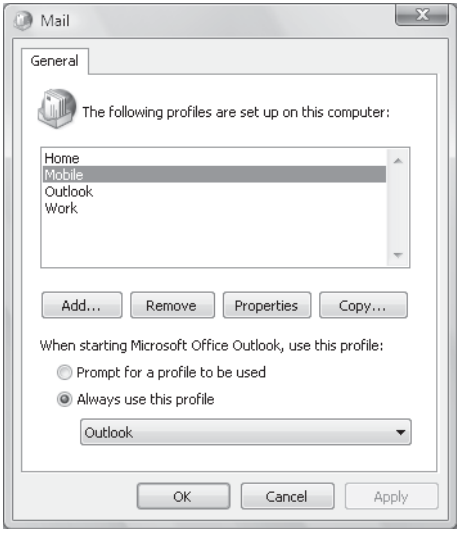

Figure 3-8 To add, remove, or edit mail profiles, click Show Profiles to display this dialog box.

Selecting a Specific Profile to Use on Startup

You can configure Outlook 2007 to use a specific profile on startup or to prompt for a profile to use. To start with a specific profile, follow these steps:

1. Start the Mail utility. Click Start, and then click Control Panel. In Control Panel, click Classic View and then double-click Mail. If you are using a 64-bit operating system, the Mail utility is listed under the 32-bit Control Panel. In Control Panel, click Classic View, double-click 32-Bit Control Panel, and then double-click Mail.
2. In the Mail Setup–Outlook dialog box, click Show Profiles.
3. Select Always Use This Profile, and then use the drop-down list to choose the startup profile. Click OK.

To prompt for a profile before starting Outlook 2007, follow these steps:

1. Start the Mail utility. Click Start, and then click Control Panel. In Control Panel, click Classic View and then double-click Mail. If you are using a 64-bit operating system, the Mail utility is listed under the 32-bit Control Panel. In Control Panel, click Classic View, double-click 32-Bit Control Panel, and then double-click Mail.
2. In the Mail Setup–Outlook dialog box, click Show Profiles.
3. Select Prompt For A Profile To Be Used, and then click OK.

The user will be prompted for a profile the next time Outlook 2007 is started.

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