



Exchange-based email

Types of email

- ◆ POP3
- ◆ Exchange
- ◆ Lotus Notes
- ◆ Squirrel mail
- ◆ Pine

They are all pretty basic and limited except Exchange email. Lotus Notes has lots of functionality, but it's a big pain from a compatibility perspective.

With Exchange, you can pay by the mailbox from an outsource vendor or have your own mail server.

Why use Exchange for email?

- ◆ One mailbox accessible from anywhere
- ◆ Email on your desktop, laptop, PDA are all in sync and access the same mailbox
 - Updates in one place propagate to all your locations
- ◆ A must have for the road warrior
 - ⇒ ActiveSync, OWA, OMA – see later
- ◆ Server-side rules
 - ⇒ Process all the time, not just when Outlook is open
 - ⇒ Thus your email is filtered all the time, before it gets to your PDA or elsewhere.
 - ⇒ GREAT time management technique
- ◆ Can use email online and offline
- ◆ Loss of your computer, hard drive, or files does not affect your ability to get to your email.
- ◆ Shared calendaring for everyone in your organization
 - ⇒ Meeting requests work easily
 - ⇒ You can see free/busy time for folks in your organization up to 6 months out (this is a per-client configuration)
 - ⇒ You can easily delegate rights to another person to fully view or manage your calendar. This is especially valuable to those who have administrative assistants.
- ◆ Shared email folders for everyone in organization - called Public Folders
- ◆ Recover deleted items for up to 30 days
 - If you have your own server, you can make this retention time even longer.

PST-based email or POP3-based email has no ability to recover deleted items.

- ◆ More stuff for space
While email management is a VERY important topic, it should be noted that you are able to store more email in the same amount of capacity with Exchange. E.g., your 100 MB mailbox in a PST file is likely to be only 80 MB in Exchange. In addition, you get more features like the ability to recover deleted items.
- ◆ If you buy Exchange server for your business, you get Outlook 2003 free for all your users.
- ◆ Global Address List
 - ⇒ All staff in the organization is automatically included in the global address list
 - ⇒ You can create custom recipients for all your vendors, clients, etc. that are kept in the GAL. This way, contact information is kept in one central location, rather than each person in an organization having to maintain separate contacts.
 - ⇒ You can create custom distribution lists.
What if you wanted to have a master distribution list of all your customers? You can do this in Exchange and then all staff in the company can email all your customers with this distribution list instead of having to maintain their own distribution list.
BUT you may think this is a bad thing. Perhaps you want to have ultimate control over who is email blasting your customer base. Also Exchange has permissions that can be set to allow only a select few to email to the distribution list, yet there is still only one copy of the distribution list being maintained.
 - ⇒ Custom distribution groups
What if you had an email address on your website info@abcco.com? You can specify in Exchange server that any email sent to info@abcco.com gets sent to these 5 people. This is very time effective since no one person has to watch a separate mailbox than their own.
This also provides business continuity. info@abcco.com is always the same on your website and you control on the back end who the email gets sent to.
- ◆ Using Outlook against an Exchange mailbox allows you to overcome a very annoying feature in Outlook when a PST is used as the mailbox. You can control name sorting in your address book where names are listed by last name, then first name. You can turn this on in Outlook 2003 when a PST is used as the mailbox, but it doesn't work right. You have to edit the Display As attribute for each contact.

Advantages of outsourced Exchange

This is perfect for companies that don't have their own server or those who don't want to deal with the complexities of having their own mail server. If your mail is in-house, you bear all the costs for maintenance, disaster recovery, backup, antivirus, anti-spam, Internet connectivity, and security. Managing your own mail server is best left to the pros.

- ◆ Don't have to back up your mailbox. This is done by the outsource vendor.
- ◆ Larger mailbox – typically you get 500 MB of storage versus with your own server you want to keep it to a limit of 250 MB or less because YOU have to back it up
- ◆ No disaster recovery, this is also done for you by the outsource vendor.
- ◆ Mailbox always available
- ◆ No need to manage your own server
- ◆ The outsource vendor has more bandwidth to their Exchange servers than you have to your whole business.
- ◆ If your network has an outage, you can go to another location where you have Internet access and start working without any system changes.
- ◆ People who access business email remotely don't use the same Internet connection that the business does. Thus all the bandwidth at your office is available for other uses.
- ◆ Better spam filtering
 - ⇒ The junk mail filter in Outlook 2003 is great, but wouldn't it be better if there were a professional grade spam filter that cleaned out the junk BEFORE it got to your mailbox? You can have this with outsourced Exchange email.
- ◆ Better virus filtering
 - ⇒ Regardless whether or not your antivirus on your computer is working, your email is scanned for viruses.
- ◆ Email aggregation – you can configure the aggregator to gather email from disparate POP3 or IMAP accounts and pull it all into your one mailbox. This way you can keep your low priority accounts.
- ◆ No need to buy Outlook 2003. With your subscription, you get Outlook 2003.
- ◆ Easier migration
 - ⇒ DNS – The MX records for your email domain must be configured to point email at your outsourced email provider. This has no impact on your website or any other host records you have. It is entirely possible to have your website hosted one place, email another, and still have your own server you remotely connect to.
There is no need to switch DNS hosting providers.
DNS records are best left to the pros.
 - ⇒ Outlook 2003 config
 - ⇒ Import previous email

⇒ NO SERVER TO SET UP

Cost: ~\$13/month at mail2web.com

Watch out for

- ◆ You want the ability to import your existing PST file to your new Exchange mailbox.
- ◆ There is no ability to have custom recipients
- ◆ Custom distribution lists can be made, but cannot be shared throughout the organization. They are specific to each user's address book (contacts) Depending upon the provider, the distribution list may become corrupted. An acceptable alternative is to use Excel to maintain your distribution list. Then simply copy and paste the emails into a new email each time you want to send to the distribution list.
- ◆ No custom distribution groups
- ◆ Find out how many emails per day the service provider lets you send. One email to 10 recipients counts as 10 emails. If you have need to send more than 1000 emails per day, and Exchange outsourced provider solution will not work for you.
- ◆ Find out the maximum allowable size of the mailbox. If your current PST file is larger than the Exchange mailbox limit, then you will need to cleanup your email prior to import.

Can get to Exchange mailbox via

- ◆ Outlook 2003
- ◆ Outlook Web Access
- ◆ Outlook Mobile Access
- ◆ ActiveSync over the Internet

ActiveSync over Internet

- ◆ Calendar
- ◆ Contacts
- ◆ Email in Inbox is synced
- ◆ Limit to internal capacity of PDA memory
- ◆ You can also pick more folders than just the Inbox to sync
- ◆ Limit of what is downloaded to PDA is customizable
 - ⇒ Download only just so many days worth of email
 - ⇒ Download only just so much email (based upon size)
 - ⇒ Configure to download entire attachment if under a particular size
- ◆ With this you can actually download some attachments and open them. If your PDA can read Word, Excel, PowerPoint, and PDF files, then you can open attachments on your PDA.
- ◆ Special config for PDA with ActiveSync and sync with Exchange mailbox.

- ◆ Configure to store attachments on storage card. Note that this is the internal storage card, not a compact flash or secure digital add-on card. I feel much safer using a PDA with ActiveSync over SSL than using a Kiosk machine. Note that you must use a good firewall for your PDA (see airscanner.com). Remember to disable Bluetooth on your PDA unless you are actively using it.

Things not synced over Internet

- ◆ Tasks
- ◆ Journal
- ◆ Notes
- ◆ These sync via USB cable to computer with Outlook 2003

Outlook Mobile Access

What is it?

SSL secure connection to your WHOLE mailbox optimized for viewing on your PDA's screen.

Really only intended to be used with PDAs. Otherwise, you would use Outlook Web Access for full Outlook client.

Outlook Web Access

What is it?

Very similar to Outlook 2003 full client, but remember that you are viewing your email through a web browser. You may need to refresh the views or click Send/Receive to get email to come in. There is no custom dictionary. The custom dictionary is kept on your main computer.

Also remember that attachments always open with whatever functionality is available on the local computer that your email is being viewed on. When you are using Outlook full client, you still have to have Word, Excel, and PowerPoint installed in order to open these files. Or you at least have to have the reader version of these apps installed. Same with PDF files. If you want to view these, you either have to have full version Acrobat installed or Acrobat Reader. This is something to be aware of when using your PDA or Outlook Web Access. When using OWA, you are relying upon the apps installed on that computer in order to open attachments. Kiosk machines sometimes do not have these apps installed as they are only intended for Internet access. For security reasons, you may not want to open attachments on a Kiosk machine. When an attachment is opened through Outlook Web Access, it is downloaded to the Temp directory on the computer and opened from there. The local copy of your attachment may not be deleted when you exit Outlook Web Access. Thus your sensitive information could be compromised or viewed by an unauthorized person.

OWA even has spell check

OWA should always be over SSL.

OWA has option to pick for public shared computer so that it won't cache stuff in the browser cache.

There is also an option to pick between the premium and the basic client. The basic client is less bandwidth intensive and better suited for dial-up connections.