**Microsoft Outlook Configuration Standards**

**System Requirements**

Hardware Specifications:

1. Minimum: Meet the [Microsoft 365 minimum hardware specs](https://www.microsoft.com/microsoft-365/microsoft-365-and-office-resources)
2. Recommended:
   1. Hard Drive: Use solid state drive
   2. RAM: At least 8GB
   3. CPU: 4 cores

OS Specifications:

1. Currently supported Version of the OS with latest updates
2. Update settings should be set to receive updates for Microsoft products

**Microsoft Outlook Client Requirements**

1. Must use currently supported version of: Outlook Web App, Outlook Desktop App, Outlook for Mobile, and any associated Add-Ins. (64-bit version of Outlook when possible)
2. Mailbox co-managers need to use the same application version and operating system as the mailbox owner.

**Permissions**

Mailbox Permissions

1. It is recommended to use Full Mailbox and Send As rights instead of Delegating permissions.
2. Customers with Full Mailbox rights should not have permissions set on folders.
3. Those with Send As permission to a mailbox will not have the Send on Behalf permission.

Calendar Permissions

1. Those that have delegate or owner permissions to a calendar need to open the calendar using the Add Calendar option.
2. The setting Turn on Shared Calendar Improvements should be enabled. This option will synchronize a copy of the shared calendar to the user’s mailbox and will show under Shared Calendars.
3. If a user has full mailbox rights to a mailbox, they should not have permissions set on the calendar itself. No one should have the calendar listed under both “My Calendars” and “Shared Calendars”

**Configuration**

Outlook Client Standards

1. Cached Exchange Mode
   1. Microsoft recommends cached exchange mode for most users.
   2. Users that manage multiple calendars, synchronize a large mailbox, synchronize multiple mailboxes or use Send As rights to send email as another account should turn cached mode off.
   3. Set Download Shared Folders to Off
2. Set Turn on Shared Calendar Improvements to Enable
3. PST files should not be used from any file server. This can cause outlook performance issues and file server / backup performance issues
4. Remove all unneeded mapped mailboxes and calendars

Mailbox Folder Limits

1. Mailboxes need to have fewer than 10000 folders
2. Mailboxes need to have fewer than 100000 items per folder
3. Calendars need to have fewer than 5000 items
4. If any of these are over the limits, then we recommend archiving more regularly to get these items under the limits.

Online Archiving

1. Folders will inherit the default policy settings but can be changed per folder if needed.
2. Set folders that are not needed to a shorter archive time policy.

**Calendar Use Standards**

Meeting Requests

1. Only one person should process meeting requests. Avoid processing the same meeting invite on multiple computers or devices running different versions of Outlook.
2. Do not move a meeting request from your Inbox to a different folder before you Accept/Decline meeting using the meeting request in the inbox.
3. Do not delete a meeting request on one client after you accept the same meeting request on another client.
4. Do not interact with a meeting request after it has been processed.
5. Reserve all Resource Rooms as a Room location or Resource attendee.
6. Do not use third-party email clients to process calendar items.

Forwarding Meetings

1. Do not forward meeting requests if you are not the meeting organizer. The meeting attendee list could become out of date for other attendees.
2. Tracking may not work properly for the forwarded users.
3. The Meeting Organizer can send the attendance list to all attendees by sending a meeting update to all attendees.

Meeting Edits

1. Do not modify the meeting item if you are not the meeting organizer.
2. Do not move an already-accepted meeting to another time on your calendar. If you do, your changes may be lost, or the meeting may become corrupted on your calendar.
3. If you cancel, update, or delete a meeting, send the meeting update to everyone.

Recurring Meetings

1. Do not use recurring meetings if frequent modifications need to be made to those future meetings.
2. Do not set recurring meetings to be indefinite endings.
   1. If the meeting is more than once a month, then it should not be more than 1 year.
   2. If the meeting is monthly, then no more than 5 years.
   3. If the meeting is yearly, then no more than 10 years.
3. To change an entire series of meetings, cancel the original meeting and create a new one.