

How to Configure Outlook 2010 to connect to Exchange 2010

Outlook 2010 will install and work correctly on any version of Windows XP, Vista or 7.

These instructions describe how to setup Outlook 2010 on a Windows 7 Ultimate PC but the process is virtually identical for all the other version of Windows.

Outlook 2010 is available as a separate program but usually comes as part of the Office 2010 program suite. Be aware that not all versions of Office 2010 include Outlook.

Outlook 2010 is able to connect to an Exchange server over the Internet, as opposed to an Exchange server located on the same LAN.

This type of connection is called an Outlook Anywhere connection.

Outlook 2010 can make use the AutoDiscover feature of Exchange 2010 but requires a CNAME DNS record to be created to enable this.

With AutoDiscover, Outlook 2010 is able to configure itself to connect to an Exchange server by the user just supplying their email address, username and password.

1 - Creating an Outlook Anywhere profile – Initial Steps

Make sure that Outlook isn't running and then:-

Click: **Start – Control Panel**

If Control Panel is in the default **Category** view, change it to **Large Icons**:-



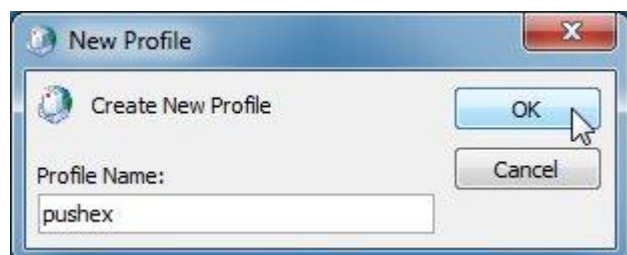
Click on the **Mail** icon:



Then click: **Show Profiles... - Add...**

and for Profile Name let's choose:-

pushex



(The profile name is only for your reference so could be anything you want.)

In the next window, shown below, it's not very clear, but you are being asked a question:-
"Is your email domain setup to use AutoDiscover or do you need to enter all the details manually?"

Add New Account

Auto Account Setup
Click Next to connect to the mail server and automatically configure your account settings.

E-mail Account

Your Name:
Example: Ellen Adams

E-mail Address:
Example: ellen@contoso.com

Password:

Retype Password:
Type the password your Internet service provider has given you.

Text Messaging (SMS)

Manually configure server settings or additional server types

< Back Next > Cancel

If you don't know the answer, then it's probably "do it manually".

If you have access to the DNS control panel at your domain registrar, it's a fairly simple procedure to enable AutoDiscover on your domain.

For example, *all* you have to do to enable AutoDiscover for **lockeconsultants.com** is to create the following DNS record:-

autodiscover.lockeconsultants.com CNAME autodiscover.pushhex.com

We'll create this DNS record for you if you give us the logon details for your DNS control panel.

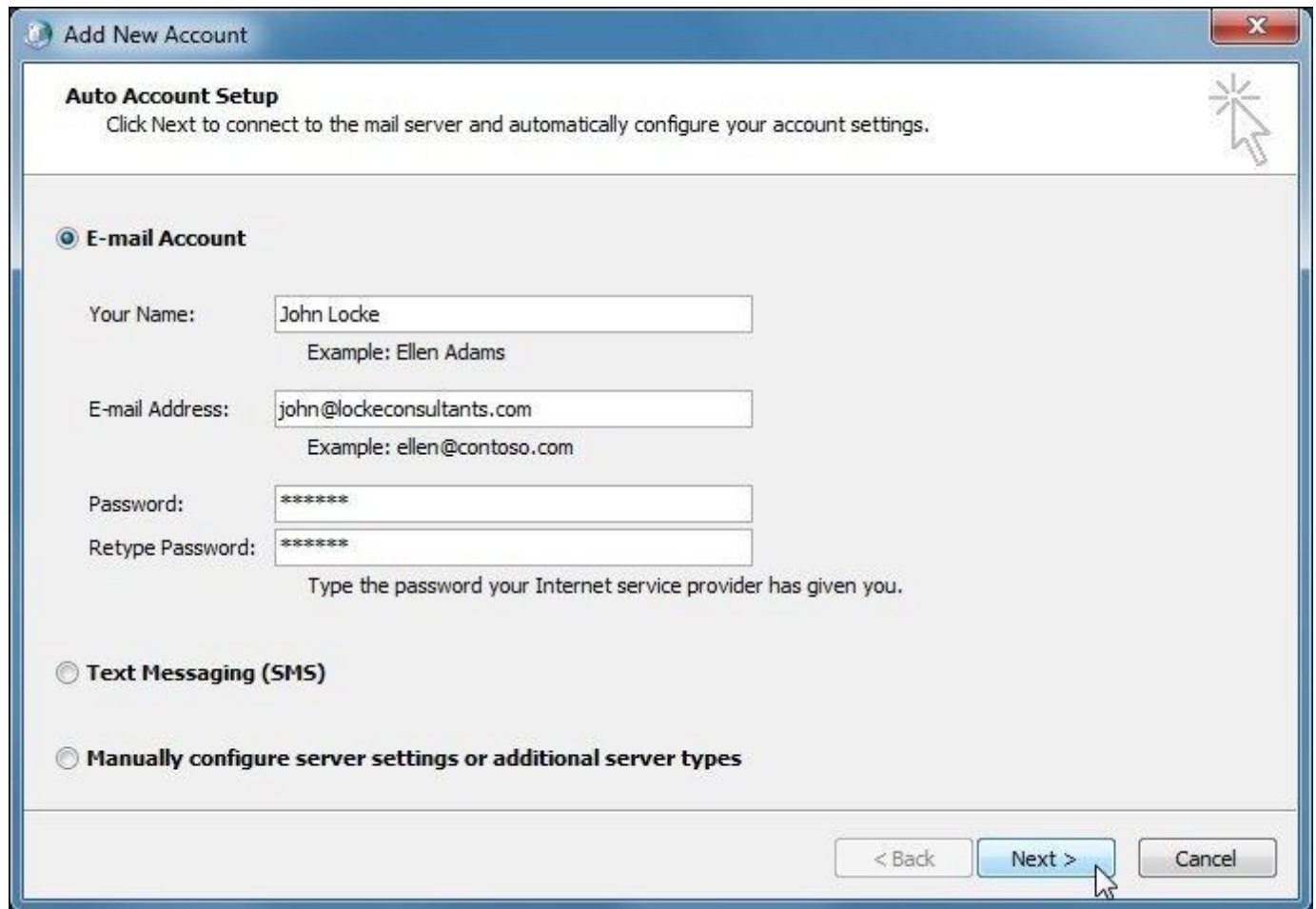
There's a brief discussion on the merits of enabling AutoDiscover at the end of this document - it's not always the best thing to do - plus instructions on how to make your copy of Outlook 2010 ignore AutoDiscover.

This document now splits into 2 paths. The **Section 2** is how to proceed if AutoDiscover *is* enabled on your domain and **Section 3** is how to configure your settings manually.

Everyone then rejoins at **Section 4** called **Running Outlook for the First time**.

2 - Setting Up an Outlook Anywhere Profile using AutoDiscover

Enter your name (usually just firstname and lastname), main email address and password into the following screen, then click: **Next >**



While Outlook is searching for your settings, you'll get this security warning pop-up:-

You have to click: **Allow**
in order for AutoDiscover to work.

We also recommend that you select **Don't ask me about this website again** so you won't see this warning every time you start Outlook.



You'll need to enter your password yet again:-

If you don't want to have to enter your password each time Outlook starts, select:-

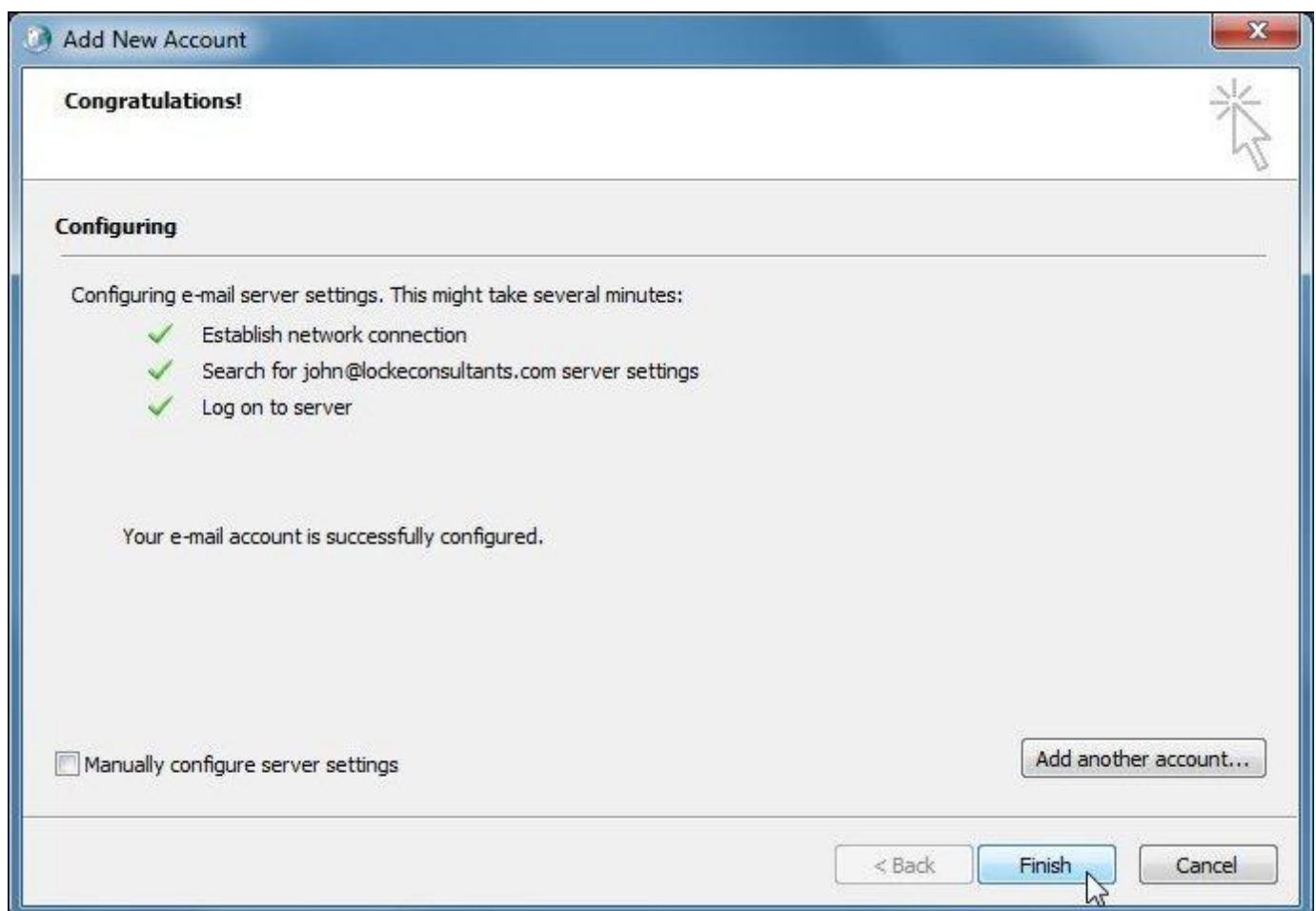
Remember my credentials

This step is actually creating an entry in the Windows Vault that you can see in:-

**Control Panel – User Accounts -
Manage your credentials.**



This screen means that the AutoDiscover process has completed successfully:-
(It *really* can take several minutes.)

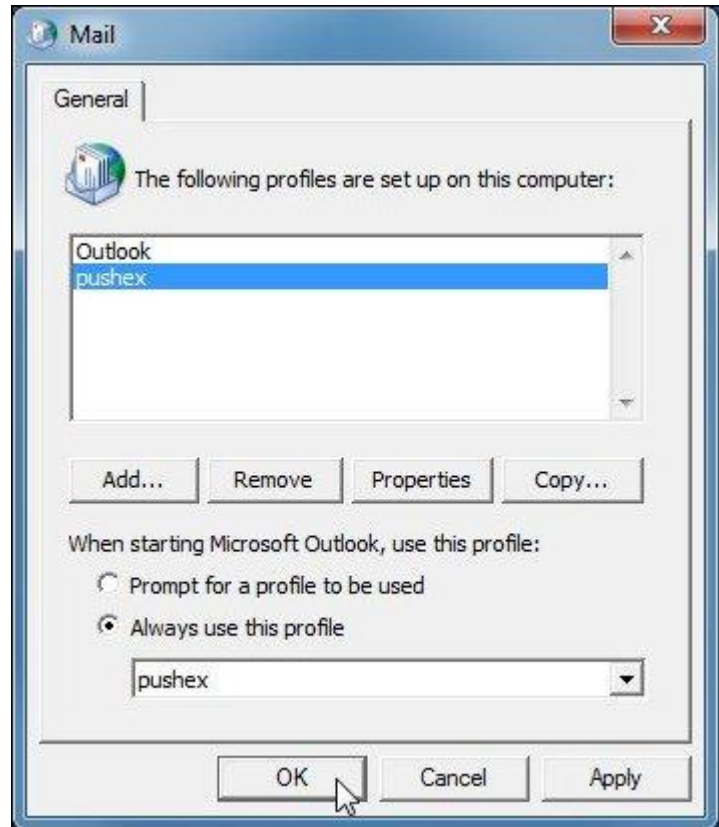


Click: **Finish**

You now return to the **Show Profiles** window:-

The new **pushex** profile you've just created will be visible in the top part of the window, along with any other pre-existing profiles.

Select **Always use this profile** and then select the **pushex** profile from the drop-down list so that Outlook will use it the next time it starts.

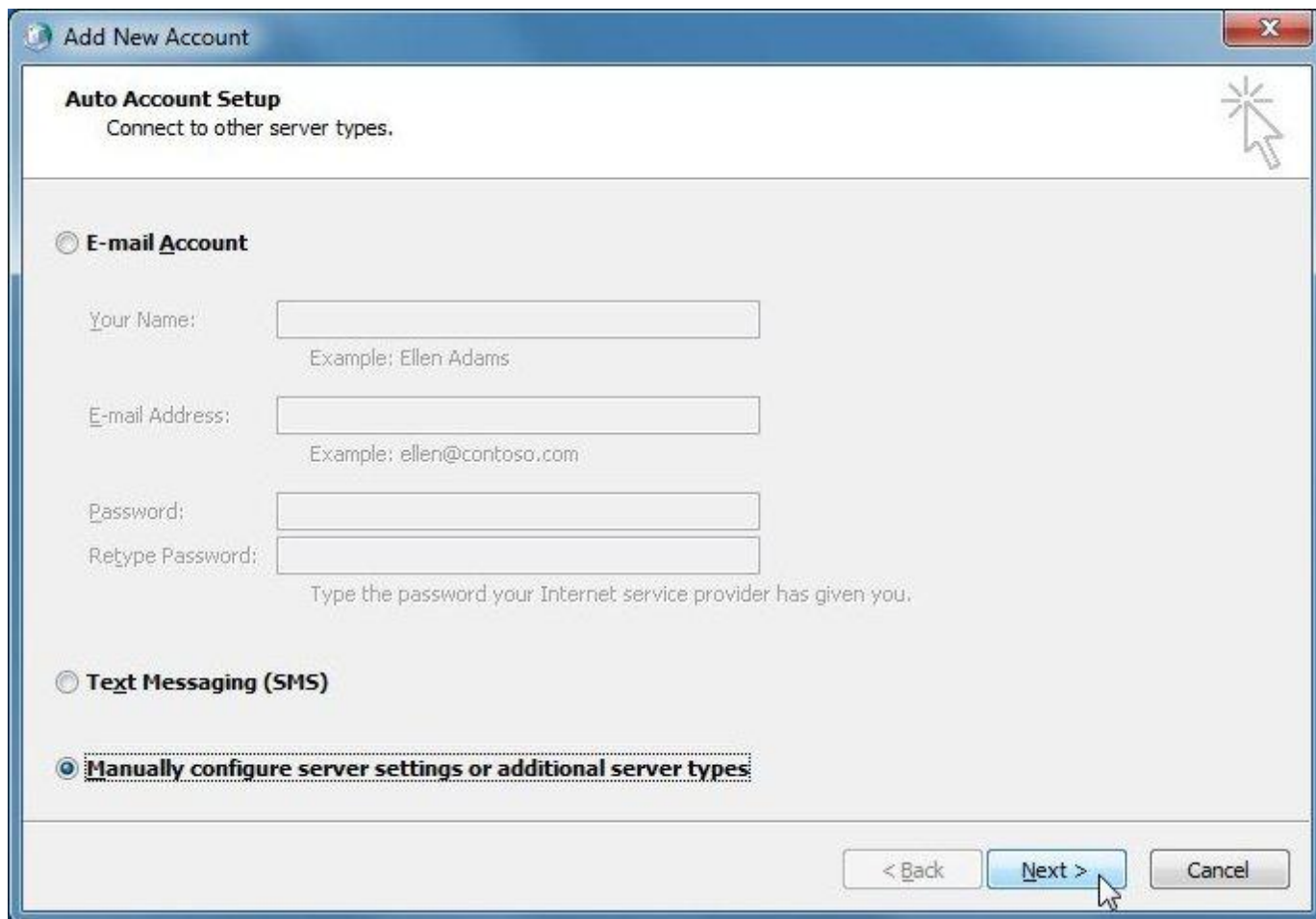


Click: **OK** and close the **Control Panel** window if it's open.

Outlook 2010 is now configured to access our Exchange servers.

3 - Setting Up an Outlook Anywhere Profile Manually

Back on the **Add New Account** screen, select: **Manually configure server settings or additional server types**



Click: **Next >**

On the next screen select the 2nd option:-

Microsoft Exchange or compatible service

then click: **Next >**

In the next window, shown below, enter the exchange server name, which will always be: **mail.pushex.com**

Select: **Use Cached Exchange Mode**

Enter your username which is usually in the format: **firstname.lastname** (all lower-case).

(Actually, case doesn't matter with usernames but, for consistency, we recommend using all lower-case.)

Add New Account

Server Settings
Enter the information required to connect to Microsoft Exchange or a compatible service.

Type the server name for your account. If you don't know the server name, ask your account provider.

Server:

Use Cached Exchange Mode

Type the user name for your account.

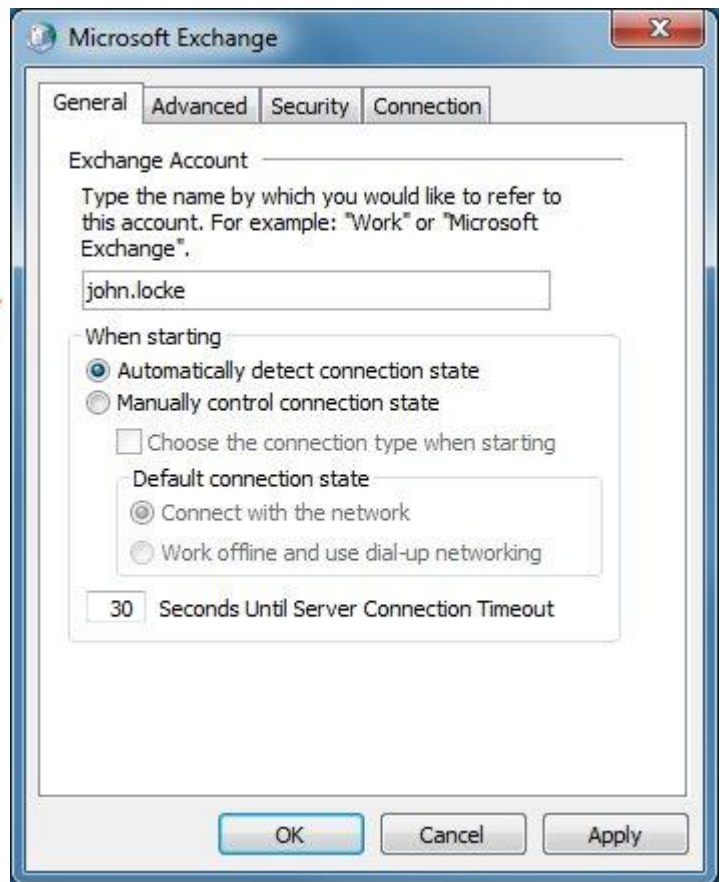
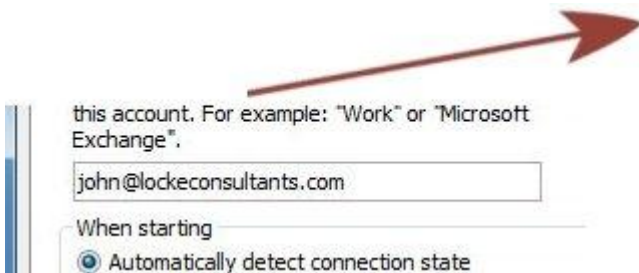
User Name:

Click: **More Settings...**

The **More Settings...** windows, with 4 tabs, is shown below:-

On the **General** tab we recommend you change the box that shows your username to your main email address.

(This will help identify this address if you are going to send emails from other email addresses assigned to your account.)



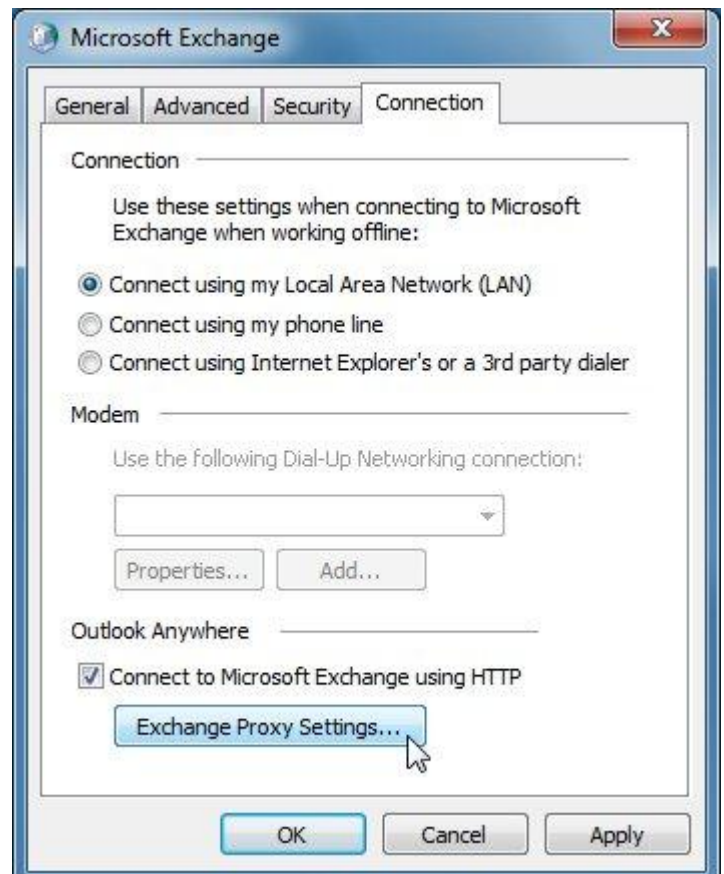
On the **Advanced** and **Security** tab there's nothing to do so go to the **Connection** tab.

The **Connection** tab is where you tell Outlook you will be connecting over the Internet.

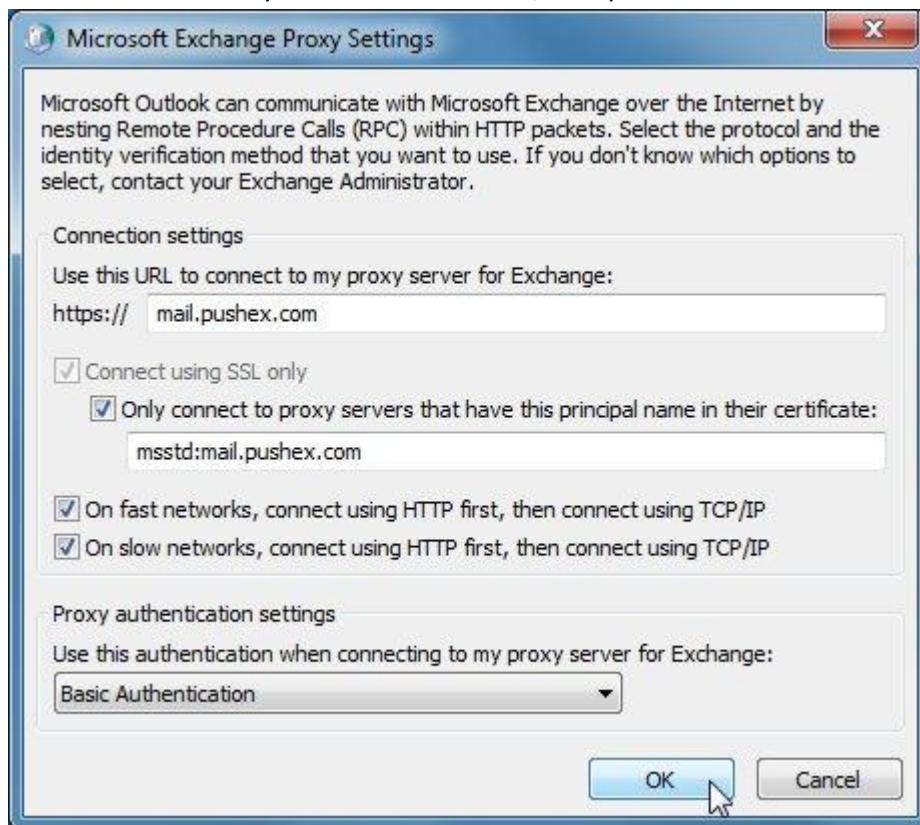
Select the box labelled:-

Connect to Microsoft Exchange using HTTP

and click: **Exchange Proxy Settings...**



The **Exchange Proxy Settings** windows is where it's easy to make a mistake so, take your time over this one. If Outlook can't connect, come back and check the settings here:-



We've shown **Basic Authentication** selected here because it will *always* work.

Unlike earlier version of Outlook, Outlook 2010 *will* remember your password

when Basic Authentication is used and so there's no reason we know of to select any of the other options here: **NTLM Authentication** or **Negotiate Authentication**.

(Both of these other authentication options should also work, as our servers are setup to accept Basic and NTLM authentication.)

Click: **OK** and you need to enter your username and password:-

If you don't want to have to enter your password each time Outlook starts, select:-

Remember my credentials

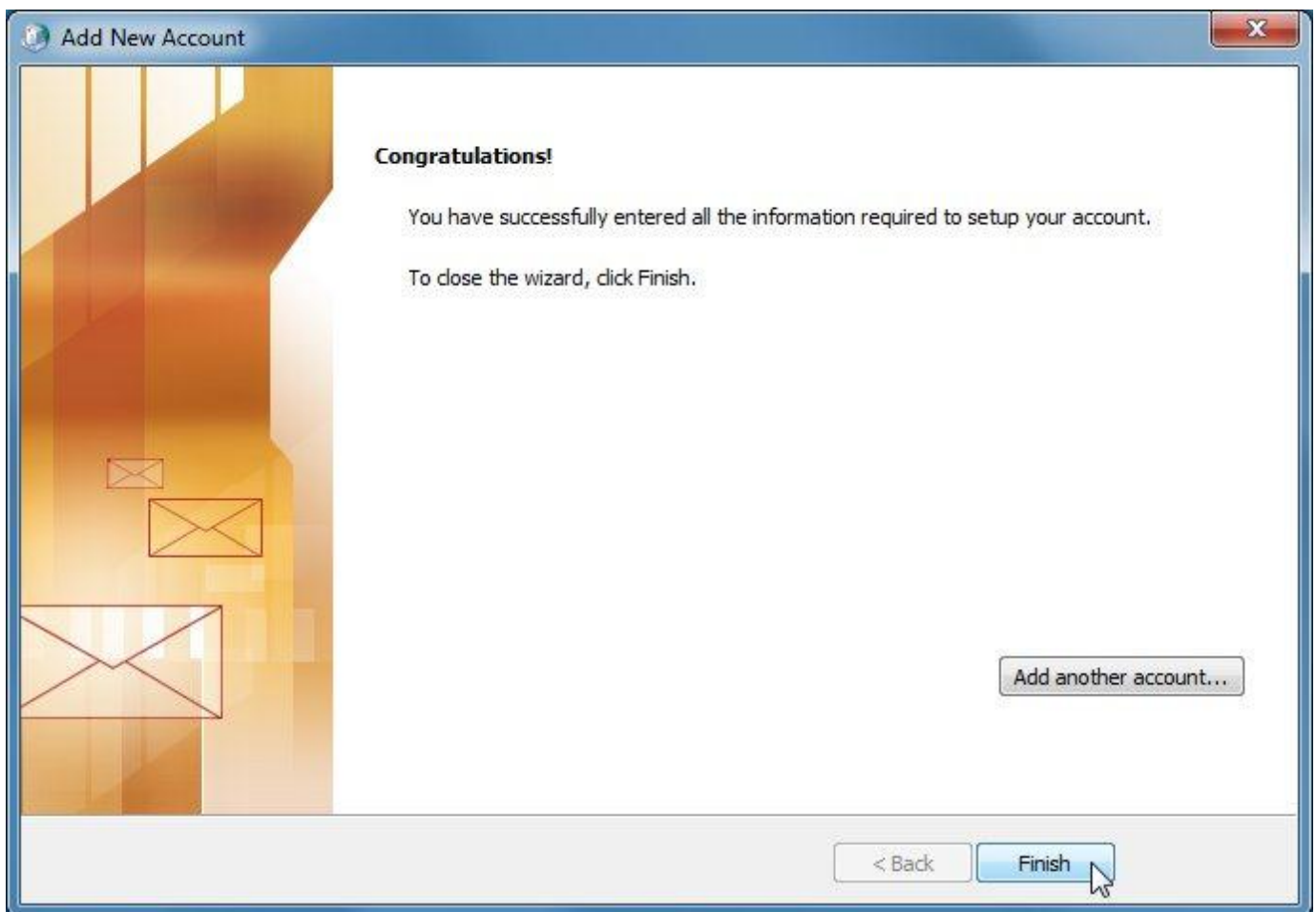
This step is actually creating an entry in the Windows Vault that you can see in:-

Control Panel – User Accounts - Manage your credentials.



Click: **OK**

You should now get confirmation that the account was setup successfully:-



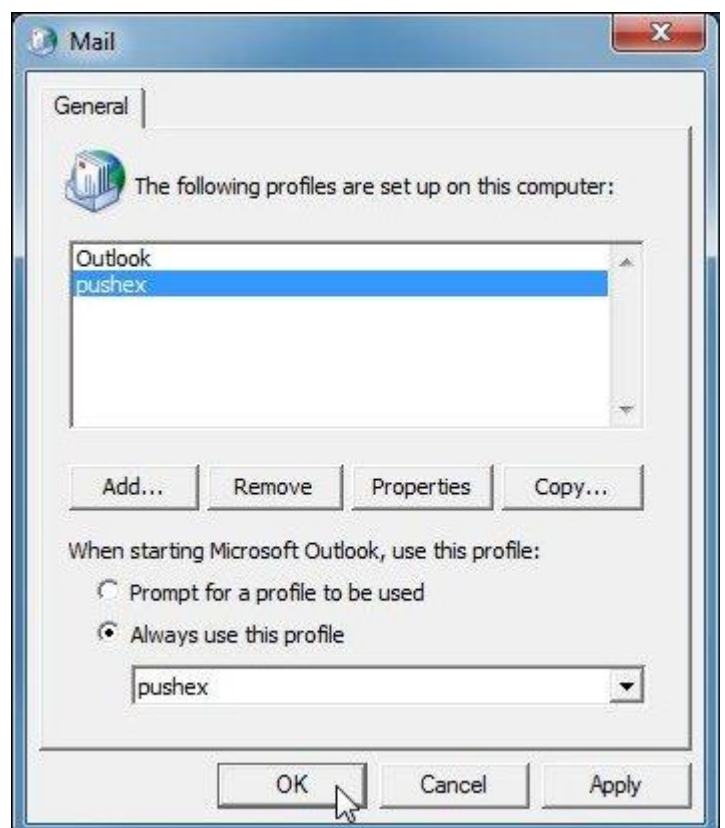
Click: **Finish** to take you back to the **Show Profiles** window:-

The new **pushex** profile you've just created will be visible in the top part of the window, along with any other pre-existing profiles.

Select **Always use this profile** and then select the **pushex** profile from the drop-down list so that Outlook will use it the next time it starts.

Click: **OK** and close the **Control Panel** window if it's open.

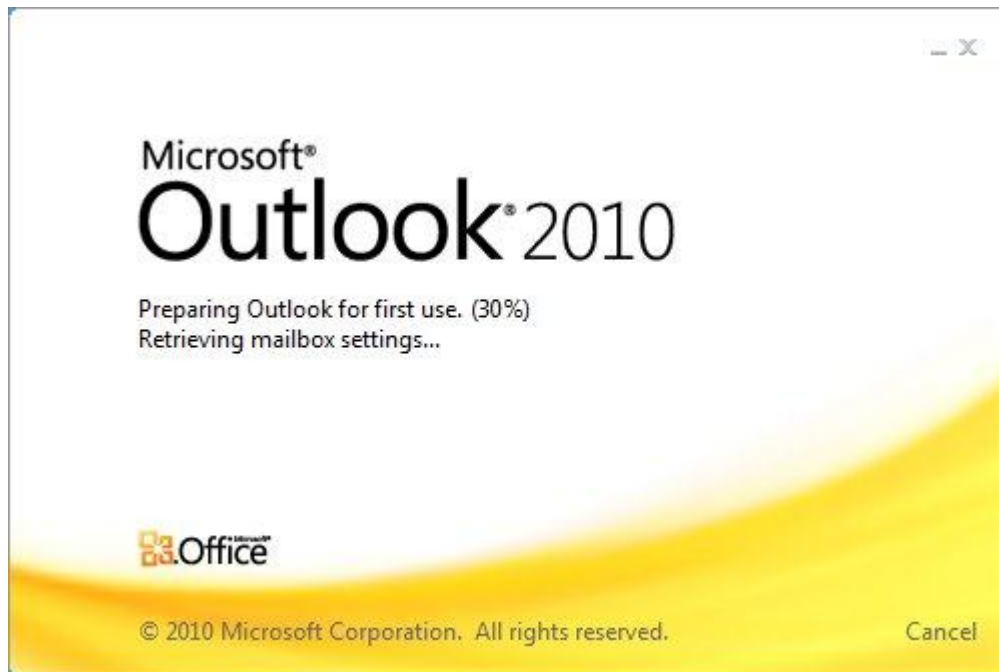
Outlook 2010 is now configured to access our Exchange servers.



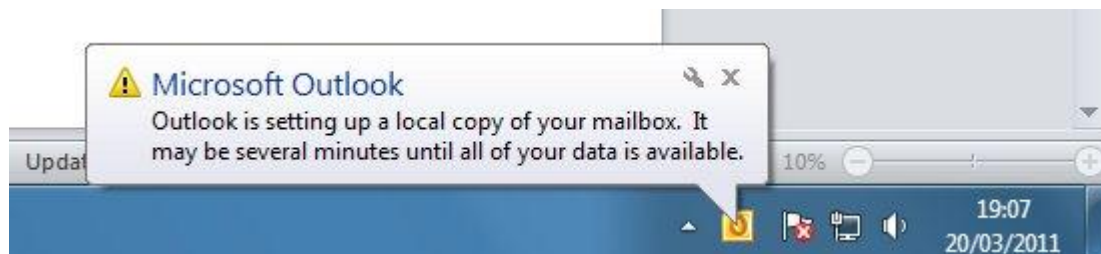
4 - Running Outlook for the First time

Use the Outlook icon to start the program.

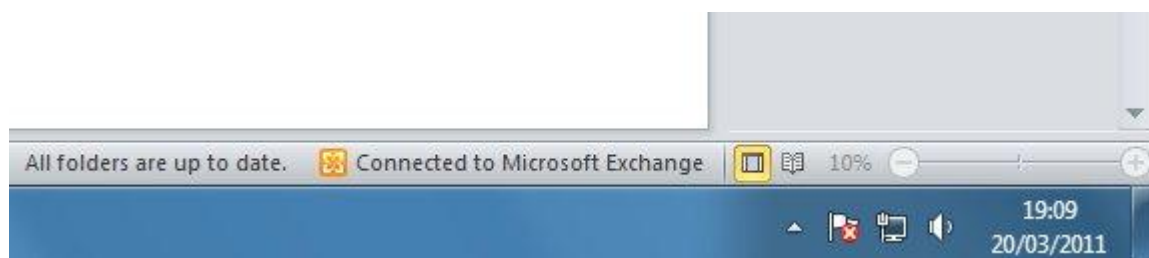
If you selected **Remember my credentials** during setup, Outlook should just start without any prompting for your password.



After the main Outlook window opens you should see this in the bottom right corner:-



This means Outlook is connected to our Exchange server and ready for use:-



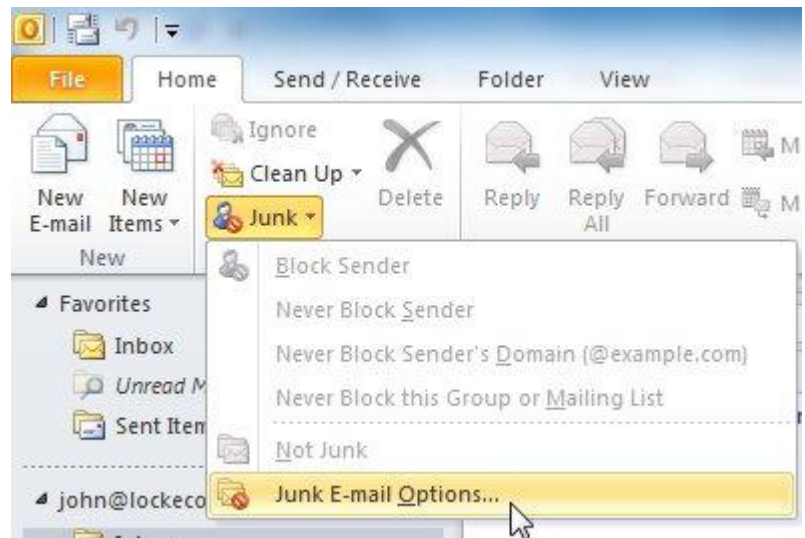
5 - Optional Extra Setup Tasks

Here is a list of things we do after creating a new Outlook profile to streamline the way Outlook works with our servers. Feel free to skip any steps you don't agree with or that don't fit the way you like to work.

1 - Stop Outlook performing its own spam filtering

Our Internet-facing servers perform spam filtering on all incoming emails before they arrive in Exchange. With spam filtering you only want **one** system to be in charge of determining if an email is spam, otherwise you don't know which system to blame when an email is miss-classified.

We recommend that you turn off Outlook's built-in Junk E-Mail filtering feature.



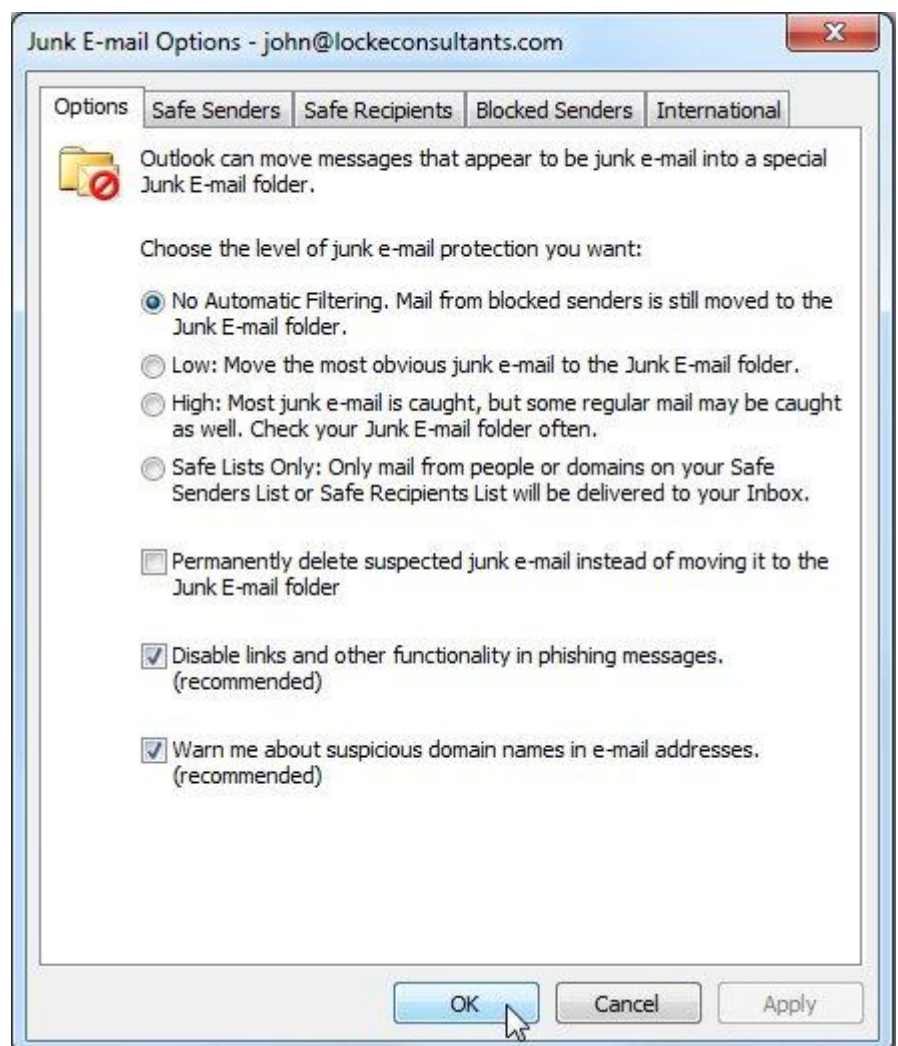
In Outlook click on **Junk** and then **Junk E-mail Options...**

Select:-

No Automatic Filtering...

Click: **OK**

You should also check the anti-virus program on your PC and, if necessary, disable its anti-spam features.



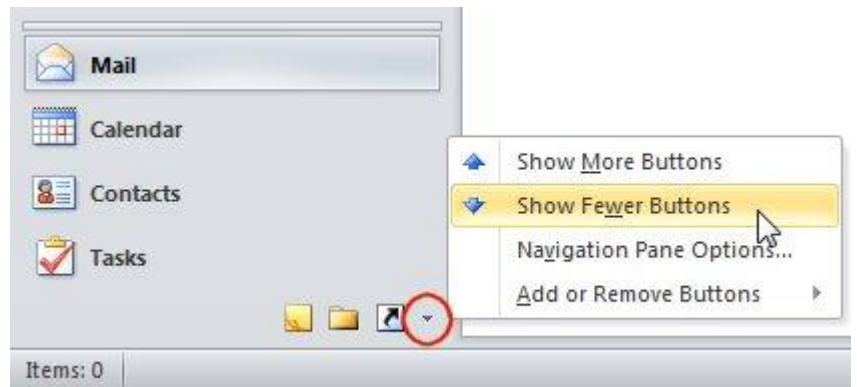
2 - Remove any Outlook Buttons you don't use

There may be some of Outlook's features that you don't use, such as Tasks. If so, you can give more space in the left-hand column to show emails folders by hiding the unused buttons.

Click on the down arrowhead (circled in red) to reveal the menu.

Click: **Show Fewer Buttons** to remove the lowest Outlook button.

Click: **Navigation Pane Options...** to change the order in which the buttons are displayed,



3 - Make the Address Book show your contacts instead of the Global Address List

By default, the Address Book in Outlook displays the Global Address List which is just a list of everyone in your email group, and this might just be you. It's usually more useful if the Address Book displays your Outlook contacts.

In Outlook, click on the **Address Book** icon to open the Address Book and then click:- **Tools – Options...**



Select **Custom** and then remove all address lists except **Contacts**.



In the bottom box select **Contacts**.

Click: **OK** and then **File – Close** to close the Address Book.

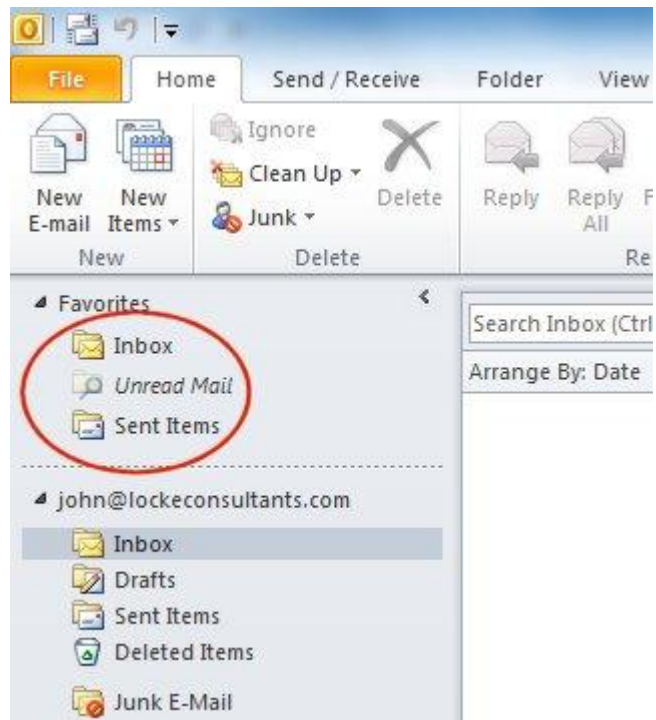
4 - Remove the Default Favorites

In our opinion, none of the **Favorites** you are given by default in Outlook 2010 (ringed in red) are useful and can be removed to give more space, in the left-hand column, to show email folders .

Unread Mail might just be worth keeping.

Right-click on each Favorite item, in turn, and select:-

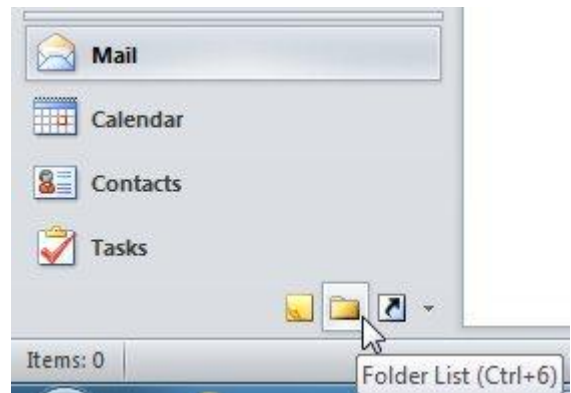
Remove from Favorites



5 - Add the Public Folders you access often to Favorites

If you're part of a group that uses Public Folders, it's useful to place the ones you access frequently in **Favorites** to make them easy to access and to alert you to new items in them when they turn bold.

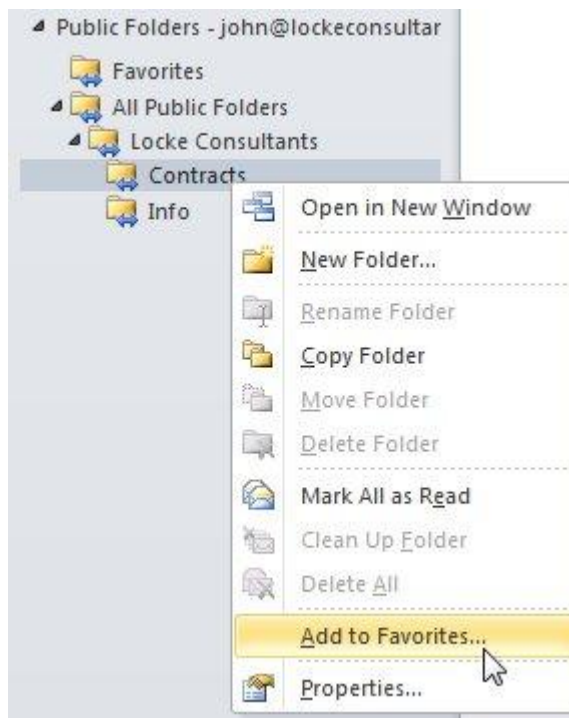
In Outlook, click on the **Folder List** icon to change the display in the left-hand column to showing all folders.



Next, it's a 2 stage process.

Stage 1

Find each Public Folder you want to add, right-click on it and choose:-



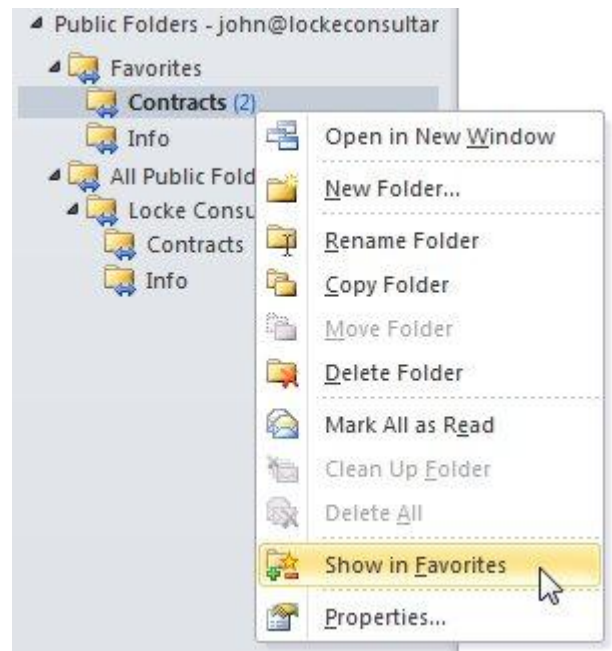
Add to Favorites...

Then click: **Add**



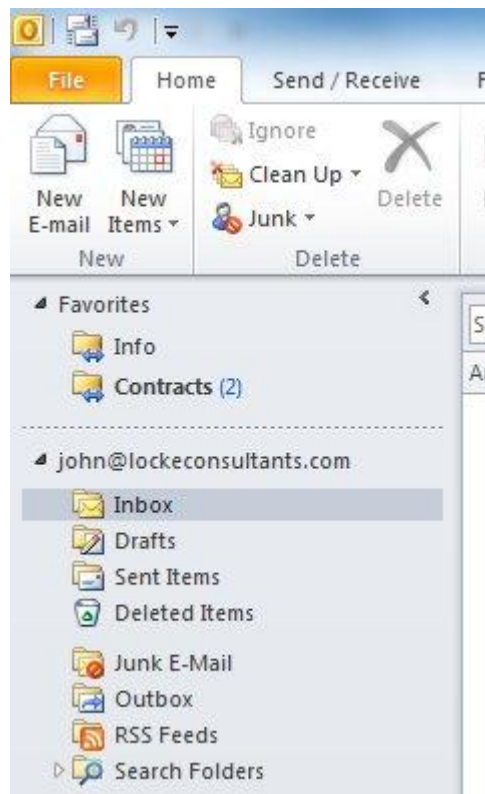
Stage 2

Find each folder **again** in **Favorites**, right-click and choose **Show in Favorites**



The above process is for Public Folders that contain mail items. Public Folders that contain calendars or contacts can't appear in **Favorites** but, completing the steps in **Stage 1** is enough to make these types of Public Folders available on the Outlook **Contacts** or **Calendar** page.

Now click the **Mail** button to return the left-hand column to its normal appearance and the Public Folders you added will now be in **Favorites**:-



6 - Make the Junk E-Mail folder go bold only when there are unread emails in it

With our email system, “probable spam” is automatically routed to your **Junk E-Mail** folder which you may want to review occasionally in case genuine emails have been put there by mistake.

By default, the Junk E-Mail folder in Outlook 2010 shows as bold when it contains **any** emails, but you may find it more useful if it behaves like all the other folders, and only shows as bold when there are unread emails in it.

In Outlook:-

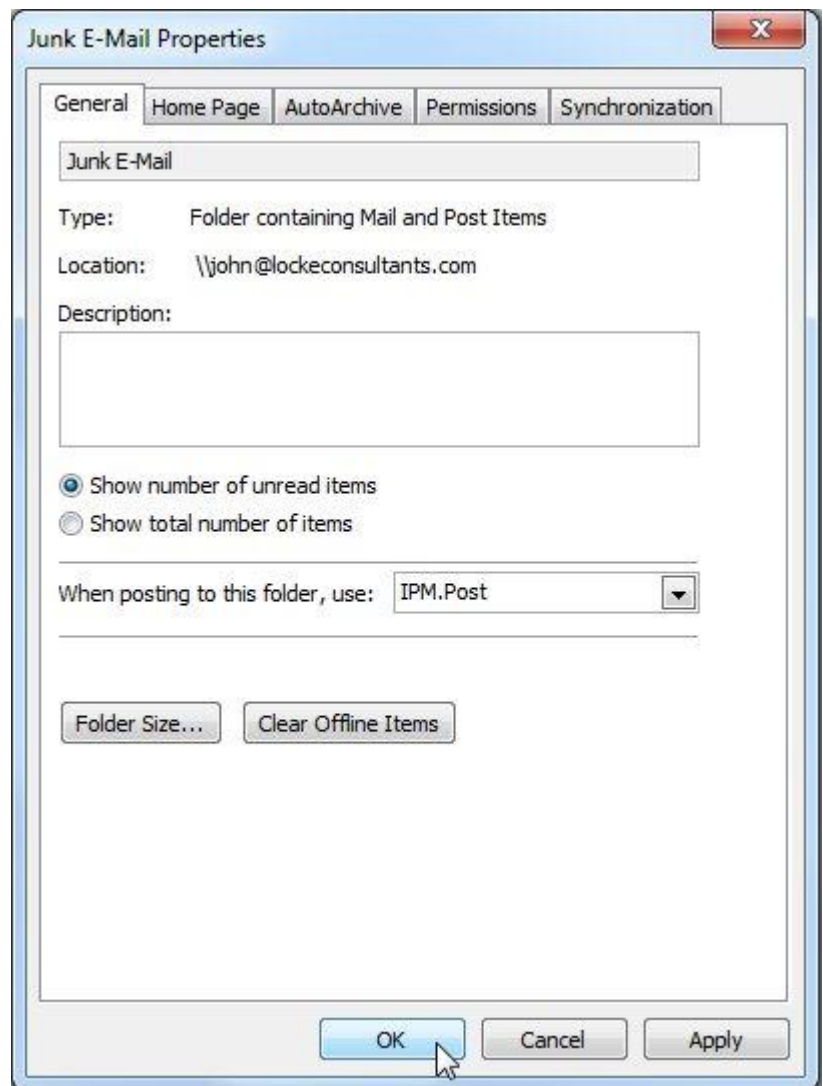
Right-click on the Junk E-Mail folder and select **Properties**

Change the selected option from:-

Show total number of items

to

Show number of unread items



7 - Other Tasks

Create an Email Signature

In Outlook go to:-

File – Options - Mail – Signatures...

Select Spell-Checker Options

In Outlook go to:

File – Options – Mail - Spelling and Autocorrect...

Maybe you want to select: **Always check spelling before sending**

5 – What are the Advantages and Disadvantages of using AutoDiscover?

As well as when initially setting up your profile, Outlook 2010 checks to see if any AutoDiscover information exists for your email domain when Outlook starts, then every hour and also whenever the connection to the server is interrupted. Each time it finds AutoDiscover information it will update your Outlook profile.

The purposes of AutoDiscover are:-

1. To make setting up an Outlook profile less error-prone and easier for non-technical users.
2. If the Exchange server that Outlook is using fails, Outlook can find, and start using, a standby server with a different name, without any need to reconfigure the Outlook profile or other intervention by the user.

We don't use the server-switchover feature of AutoDiscover in order to maintain compatibility with Outlook 2003 users who would need to create a whole new profile in order to connect to an Exchange server with a different name.

That doesn't mean we don't have standby servers in case our primary one fails, just that they all have the same name so that Outlook 2003 can switch to using one of them without any user intervention.

AutoDiscover would make the downtime during a switchover a few minutes shorter than with our system but we don't expect this situation to happen very often.

When designing our current Hosted Exchange system, a decision was made to support Outlook 2003 clients and this meant not using the server-switchover feature of AutoDiscover. If we **had** used this feature then our advice would be that it was important to enable AutoDiscover on your domain.

Our **actual** advice is that we recommend using AutoDiscover for all users as we find that, overall, there are less problems than when Outlook profiles are setup manually.

AutoDiscover's usefulness will depend on how many Outlook profiles you need to setup: 100 non-technical users setting up their own profiles –extremely useful;

a handfull of users that know what they're doing or you setup all the profiles in your organisation – not so critical.

So what are the *Disadvantages* of using AutoDiscover?

Besides the possible problem of creating the CNAME record (which should **not** be the reason you decide against using AutoDiscover), we haven't really come across any with Outlook 2010 except, maybe, it seems to take a little bit longer to start-up with AutoDiscover enabled as Outlook has to check that the configuration information hasn't changed.

The AutoDiscover settings we've created **force** your Outlook profile to use Basic authentication.

Basic authentication will always work while NTLM can often fail. In some versions of Outlook, Basic authentication means you need to enter your password each time Outlook starts, while NTLM authentication will remember your password.

Basic and NTLM Authentication are equally secure over the strongly-encrypted SSL connection used by Outlook.

We felt the minor inconvenience of having to keep entering your password outweighed the major inconvenience of not being able to connect at all.

You may find that NTLM authentication works fine on your network and some of your Outlook 2007 users are complaining about having to keep entering their passwords.

Besides ignoring them, the solutions to this are:-

1. Upgrade these users to Outlook 2010 which **will** remember passwords with Basic authentication.
2. Don't use AutoDiscover and configure your users' profiles manually with a mixture of NTLM and Basic authentication profiles, depending on their individual circumstances.
3. Use AutoDiscover but disable it for the users who are complaining and switch them to NTLM authentication – see below on how to do this.

How to make Outlook 2010 ignore AutoDiscover and just use Manual Settings

In case you find a good reason to do this we thought we'd include details of how to disable AutoDiscover. Microsoft doesn't make this easy and it requires several values to be added in the Windows Registry.

You need to add 6 new values to this key:-

HKEY_CURRENT_USER\Software\Microsoft\Office\14.0\Outlook\AutoDiscover

The values are all DWORDs and they should all be set to 1. (Set them all to 0 to re-enable AutoDiscover.)

The value names are:-

ExcludeScpLookup

ExcludeHttpRedirect

ExcludeHttpsAutoDiscoverDomain

ExcludeHttpsRootDomain

PreferLocalXML

ExcludeSrvRecord

As always when editing the Windows Registry proceed with caution.

To save you some typing, copy and paste the following into Notepad and save the file as **autodiscoverdisable.reg** then double-click on the file to import these values into your Registry.

Windows Registry Editor Version 5.00

```
[HKEY_CURRENT_USER\Software\Microsoft\Office\14.0\Outlook\AutoDiscover]
"ExcludeScpLookup"=dword:00000001
"ExcludeHttpRedirect"=dword:00000001
"ExcludeHttpsAutoDiscoverDomain"=dword:00000001
"ExcludeHttpsRootDomain"=dword:00000001
"PreferLocalXML"=dword:00000001
"ExcludeSrvRecord"=dword:00000001
```

As the Registry key we're modifying is in HKEY_CURRENT_USER, this will have to be done for everyone who logs onto a particular PC.