How to Configure Outlook 2010 to connect to Exchange 2010

Outlook 2010 will install and work correctly on any version of Windows XP, Vista, Windows 7 or Windows 8.

These instructions describe how to setup Outlook 2010 on a Windows 7 Ultimate PC but the process is virtually identical for all the other versions 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 you to make a CNAME DNS record at your domain 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.

We strongly recommend that you enable AutoDiscover for your domain as it makes Outlook run more smoothly.

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:-

Adjust your computer’s settings

System and Security
- Review your computer’s status
- Back up your computer
- Find and fix problems

Network and Internet
- View network status and tasks
- Choose homegroup and sharing options

User Accounts and Family Safety
- Add or remove user accounts
- Set up parental controls for any user

Appearance and Personalization
- Change the theme
- Change desktop background
- Adjust screen resolution
In Control Panel, 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 can call it 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?”

If you don’t know the answer, then it’s probably “do it manually”.
(It doesn’t hurt if you configure Outlook manually when AutoDiscover is enabled - it just takes longer and is more error-prone.)
For AutoDiscover to work you have to have created a specific DNS record for your domain.

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.pushex.com
```

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

We recommend that you **do** enable AutoDiscover as it makes everything work more smoothly.

There are 2, fairly minor, problems that occur when you don’t use AutoDiscover:–

1 - You can’t modify your Out-Of-Office status from within Outlook – you can still modify it using WebMail.
2 – You can’t download your Offline Address Book. This sounds more serious than it is. The Offline Address Book only contains details of the other members of your company who also have mailboxes on our system and it can’t be modified. Most people never use this address book, however, you’ll get regular warnings appearing in the **Sync Issues** folder about the Offline Address Book not being downloaded.

There’s more information about AutoDiscover at the end of this document including an example of when AutoDiscover should **not** be used plus instructions on how to make your copy of Outlook 2010 ignore AutoDiscover information.

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 >**

![Add New Account Window]

While Outlook is “Searching for your mail server settings…”, you may get this security warning pop-up:-
(If it doesn’t then you’ll see it later when you start Outlook.)

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:-

(A common error is to miss out the pushex\ before your username.

Although you can you to use your main email address instead of pushex\<username> we’ve found that it’s not as reliable)

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:

![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.

(If you still need to regularly use your old Outlook profile – perhaps until your email archive has been migrated to our system – you can select instead: **Prompt for a profile to be used**)

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

Outlook 2010 is now configured to access our Exchange servers.

*Now go to Section 4 on page 12*
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.)

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*Don’t* click Next> - 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** tab:

Check that:

**Use Cached Exchange Mode** is – *Selected*

**Download shared folders** is – *Deselected*

**Download Public Folder Favorites** is – *Selected*

(This is also the tab where you choose to have any additional mailboxes open in Outlook, that you have permission to access, but you can’t do this now before the profile has been created so, to do this, you’ll need to come back to this tab later.)
There’s nothing to do on the **Security** tab so go next to the **Connection** tab.

The **Connection** tab is where you tell Outlook you will be connecting to the Exchange server 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**, then **OK**, then **Next**>
You’ll now need to enter your username and password:

(A common error is to miss out the *pushex* before your username.

Although you can you to use your main email address instead of *pushex\<username>*
we’ve found that it’s not as reliable)

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** and you should now get confirmation that the account was setup successfully:

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.

(If you still need to regularly use your old Outlook profile – perhaps until your email archive has been migrated to our system – you can select instead: Prompt for a profile to be used)

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.

![Outlook 2010 Startup](image)

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

![Warning Message](image)

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

![Exchange Connection](image)
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 it’s 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*:

Occasionally, for some unknown reason, a Public Folder may disappear from *Favorites*, but repeating *Stage 2* above usually brings it back.
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
6 – **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 very important to enable AutoDiscover on your domain.

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

However, if you **don’t** use AutoDiscover then you will suffer from these two specific problems:

1. **You can’t configure or change your Out-of-Office settings from within Outlook.**
   This problem causes the most inconvenience for people that use this feature but you can still change your Out-of-Office settings by logging onto your mailbox using Webmail.

2. **In your mailbox folder called Sync Issues you will get regular warnings about a failure to download your Offline Address book.**
   Normally this folder is hidden so you can just ignore the warnings. The inability to download your Offline Address Book is highly unlikely to cause a problem.
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. Basic and NTLM Authentication are equally secure over the strongly-encrypted SSL connection used by Outlook.

There are also some specific situations when you shouldn’t use AutoDiscover. An example is where you might be trialing our system with a few users at your domain while the rest are still using your own Exchange server.

If you create an AutoDiscover DNS record it will make the other users’ Outlook 2007/10/13s try to link to our Exchange server or, if you already have an AutoDiscover record for your own server, then the ones trialing our service won’t be able to connect to our server.
How to make Outlook 2010 ignore AutoDiscover and just use Manual Settings

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.