How to Configure Outlook 2013 to connect to Exchange 2010

Outlook 2013 will install and work correctly on any version of Windows 7 or Windows 8. Outlook 2013 won’t install on Windows XP or Vista. 32-bit versions of Outlook 2013 will install on 64-bit versions of Windows but 64-bit Outlook won’t install on 32-bit Windows. To avoid compatibility problems, it’s safest to get the 32-bit version of Office/Outlook as you’re unlikely to suffer any problems due to the memory limitations of 32-bit programs. The 32-bit and 64-bit versions of Outlook work equally well with Exchange 2010.

These instructions describe how to setup Outlook 2013 32-bit on a Windows 8 Professional 64-bit PC, but the process is very similar for all the other versions of Windows 7 and desktop versions of Windows 8.

Outlook 2013 is available as a separate program but usually comes as part of the Office 2013 program suite. Be aware that there are 12 different versions of Office 2013 and they don’t all include Outlook.

Outlook 2013 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 2013 can make use of the AutoDiscover feature of Exchange 2010 but requires you to have created a CNAME DNS record at your domain to enable this.

With AutoDiscover, Outlook 2013 is able to configure itself to connect to an Exchange server when the user just supplies 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:-

Go to Control Panel
If Control Panel is in the default Category view, change it to Large Icons:-
In **Control Panel**, click on the **Mail** icon:

(With 64-bit Outlook it’s just called **Mail**)

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

and for Profile Name let’s choose:-

**pushex**

(The profile name is only for your reference so you 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, usually at your domain registrar, it’s a fairly simple procedure to create this record.

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 can 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 2013 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 >

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 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 – Windows 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 every 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 still open.

Outlook 2013 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: **Manual setup or additional server types**

Click: **Next >**

On the next screen select the 1st option:-

**Microsoft Exchange Server 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.)

The **Mail to keep offline** option defaults to 12 months. We recommend that you move the slider all the way to the right to set this to **All**:

This setting is a new feature, introduced in Outlook 2013, which allows you to choose what proportion of the master copy of your mailbox, stored on our servers, is also stored as a local copy on your computer. Keeping it all means that, if you can’t get a connection to the Internet, everything is still available to search. It’s also insurance against the unlikely event of there being a disaster with all of our servers or our company going out of business when you would still have a full copy of your Outlook data on your local PC.

The only times it might makes sense to choose a lesser amount to store locally is:-
1 - If you are using a computer to run Outlook for just a short time and you don’t want to overload your Internet connection by having up to 6gb of Outlook data downloaded.
2 – You have an enormous mailbox (>10gb) and the continuous synchronisation effort is slowing Outlook down.

*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 show instead 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 2013 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 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 –Windows Credentials

Click: OK and You’re all set!

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 every 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 2013 is now configured to access our Exchange servers.
4 - Running Outlook for the First time

Click on 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 icon](image)

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

![Outlook connection](image)

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 – Determine how much of your email archive will be stored on the local computer

Anyone who setup their Outlook Profile manually will already have been through this step.

From Outlook go to File – Info – Account Settings – Account Settings...

Select your Microsoft Exchange account and then click: Change...
The **Mail to keep offline** slider will be at the default **12 months** position if you setup your Outlook profile automatically using AutoDiscover:

![Add Account](image)

We recommend that you move the slider all the way to the right to set this to **All**:

![Mail to keep offline](image)

This setting is a new feature, introduced in Outlook 2013, which allows you to choose what proportion of the master copy of your mailbox, stored on our servers, is also stored as a local copy on your computer. Keeping it all means that, if you can’t get a connection to the Internet, everything is still available to search. It’s also insurance against the unlikely event of there being a disaster with all of our servers or our company going out of business when you would still have a full copy of your Outlook data on your local PC.

The only times it might makes sense to choose a lesser amount to store locally is:

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2 - 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 mis-classified.

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

In Outlook, from the Home tab 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.
3 - Remove any Outlook “Words” you don’t use

There may be some Outlook features that you don’t use, such as Tasks or Notes. If so, you can remove these options from the list of “Words” at the bottom left of the Outlook main screen.

To change this, click on the 3 dots (ringed in red), then select: Navigation Options...

From this screen you can set how many “Words” appear and in what order.

If you select Compact Navigation you can replace the words with icons.
4 - 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 only be you. It’s usually more useful if the Address Book displays your Outlook contacts.

On the Home tab of Outlook, click on Address Book to open the Address Book and then click:

Tools – Options...

Select the Start with contact folders radio button.

For When opening the address book,... select Contacts.

Click: OK and then File – Close to close the Address Book.
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 unread items in these folders.

In Outlook, click on the 3 dots (ringed in red) then select: Folders 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

The server remembers which folders you have added to Favorites so you should only have to do this part of the process on one computer.
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 word Mail to return the left-hand column to its normal appearance and the Public Folders you added will now be in Favorites:-

The number next to the Public Folder name indicates the number of unread emails it contains.

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 2013 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 – Change the order in which Sub-folders are displayed

With Outlook 2013 you now have the choice to have sub-folders, which are displayed in the left-hand column, sorted in either alphabetical order or in the order you choose.

By leaving the Show All Folders in A to Z button on the Folders tab deselected, you can left-click and drag the folders around to get them in the order you want. Select the Show folders A to Z button and they switch to alphabetical order, deselect it again and it goes back to the order you had previously.

This only applies to sub-folders and not to top-level folders.

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8 - 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 – When AutoDiscover should not be used and how to make Outlook ignore

As well as when initially setting up your profile, Outlook 2013 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-swatchover 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-swatchover 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 2013 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 2013 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\15.0\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\15.0\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.