

Hosted Exchange 2003 Quick Start Guide

Step-by-Step Guide to Account Set-up & Administration on the 2003 Platform

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1. Checking your MX Records to point to your Hosted Exchange 2003 Server

1.1 You or your domain host will need to change your domain's MX records to point to your Hosted Exchange 2003 server. An **MX record** is used to allow incoming mail to reach your mailbox server, and without it you wouldn't be able to receive incoming mail.

You need to create a **MX record** to be as follows:

- Set the MX Record as: **av2.hostlogicplc.net**.
- Set the MX Priority as: **10** (**Note: Number must be lower than all other MX Records**)

1.2 The MX record change will take between 12-48 hours to propagate throughout the Internet. The time it takes depends on your domain host and will vary. During this time your e-mail will continue to go to your current mail provider. Once the change is complete all e-mail will then be routed to Outsourcery hosted services.

1.3 You can check if the propagation is completed by going to:
<http://www.outsourcery.co.uk/support/tools/>

1.4 Enter the domain name in the domain field of DNS Lookup and change the record type to '**MX**' and then click '**Go**'. The MX record should show as:

MX preference = 10, mail exchanger = av2.hostlogicplc.net

DNS LOOKUP	WHOIS
Domain: <input type="text" value="hostlogicplc.net"/>	Domain: <input type="text"/>
Record: <input type="text" value="MX"/>	<input type="text"/>
<input type="button" value="Go"/>	<input type="button" value="Query whois"/>

DNS LOOKUP RESULTS
Server: UnKnown
Address: 172.19.1.113
hostlogicplc.net MX preference = 5, mail exchanger = av2.hostlogicplc.net

1.5 If it doesn't, then your MX records are pointing to the wrong location or have not been changed yet. You will need to speak to your current domain host and ask them to change the MX records to point to the MX record specified by Outsourcery. If Outsourcery is your domain name host, then we can make this change for you.

Note: If you are unsure of how to action the above or if you domain host cannot make these changes for you, then please contact the Technical Support Team on 0843 366 3366 select option 3 for assistance. You will need to ask to be transferred to a member of the Tech Team.

2. Adding a new user to an existing organisation and assigning the Exchange 2003 service

You can begin this section of the guide once your Exchange 2003 provisioning has been completed by Outsourcery and we have provided you with an initial admin login.

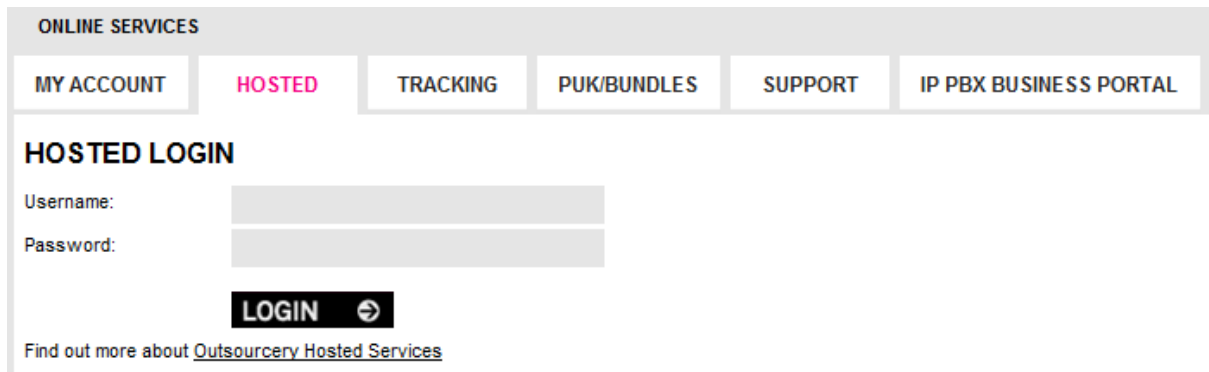
The first time you sign up to a Hosted Exchange Service, we will setup your organisation in our control panel. An admin account (usually admin@yourdomain); will be created for you, which is for configuring and administering your users. **The admin account is for administration and configuration only and cannot have services added to it.**

Note: Additional users can be given Administration access, but Outsourcery recommends you only use the admin login for admin tasks.

- Start -

2.1 Go to <https://www.outsourcery.co.uk/login/> and click on the **Hosted** tab.

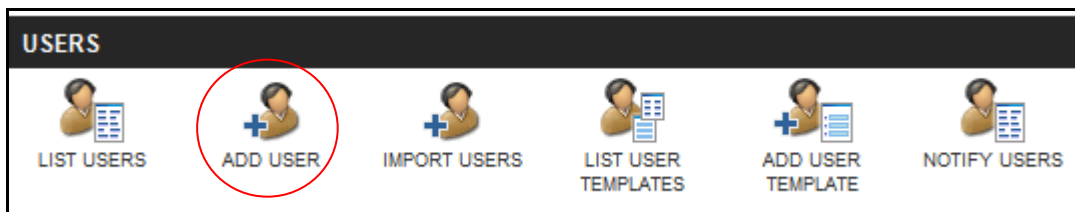
2.2 Login to the control panel using your administrator username and password (in the format: admin@yourdomain).



The screenshot shows the 'ONLINE SERVICES' navigation bar with tabs for 'MY ACCOUNT', 'HOSTED', 'TRACKING', 'PUK/BUNDLES', 'SUPPORT', and 'IP PBX BUSINESS PORTAL'. Below this is the 'HOSTED LOGIN' section with fields for 'Username:' and 'Password:', a 'LOGIN' button with a right-pointing arrow, and a link to 'Find out more about Outsourcery Hosted Services'.

Your password is what was agreed at the Pre Connect Courtesy Call and should be on the signed contract. If you have forgotten this, please e-mail in to hostingsupport@outsourcery.co.uk and the password will be resent to the account holders e-mail address.

2.3 Once you're on the control panel, click on the **Add User** icon.



2.4 You will now see the screen below. Proceed to enter all required details relating to the new user. You also have the option of giving the user administrator rights to the account by ticking the 'organisation administrator privileges' box. Once completed, click **next**.

Note: Ensure you provide an alternative email address as a set-up confirmation e-mail will be sent to this address once provisioned. Also if you forget your password it will be sent to the alternative e-mail address.

USER INFORMATION	
TEMPLATE:	[NO TEMPLATE]
GENERAL INFORMATION	
USERNAME:	<input type="text"/> *@gcotest.co.uk
FIRST NAME:	<input type="text"/>
MIDDLE NAME:	<input type="text"/>
LAST NAME:	<input type="text"/>
ACCESS CONTROL	
AUTO GENERATE PASSWORD:	<input type="checkbox"/>
PASSWORD:	<input type="text"/>
CONFIRM PASSWORD:	<input type="text"/>
ORGANIZATION ADMINISTRATOR PRIVILEGES:	<input type="checkbox"/>
CONTROL PANEL ACCESS ENABLED:	<input checked="" type="checkbox"/>
ACCOUNT EXPIRES:	<input type="checkbox"/>
	Month Day Year
	7 8 2009 *
CONTACT INFORMATION	
EXTERNAL EMAIL:	<input type="text"/>
PHONE:	<input type="text"/>
DESCRIPTION:	<input type="text"/>

The sections are explained as follows:

- **Template:** There is no need to use a template, leave this option on default.

General Information:

- **Username:** This is the username the user can use to log into the Control Panel – this also determines what the user's Exchange e-mail is going to be.
- **First Name:** Enter a first name (Required)
- **Middle Name:** Optional
- **Last Name:** Enter a Surname (Optional)

Access Control:

- **Password:** Enter a password – The password must have at least one uppercase character and one number in it.
- **Confirm Password:** Confirm the password
- **Organization Administrator Privileges:** Confirm if the user needs admin rights to the Control Panel or not.

- **Account Expires:** You can set an expiry date for the account – if it's a temp user for example.

Contact Information:

- **External Email:** You can assign an external e-mail for the user if required
- **Phone:** Optional
- **Description:** Optional

Once you're finished editing the new user details, click **next**.

2.5 You now have the opportunity to select which services the account requires. E.g. Hosted Exchange or Hosted BlackBerry Enterprise. As this account only has Hosted Exchange, place a tick next to '**Hosted Exchange 2003**' and click **next**.

AVAILABLE SERVICES	
Select the services to enable for the user.	
AVAILABLE SERVICES	
HOSTED CRM 4.0 SERVICE 1.0.0:	<input type="checkbox"/>
SHAREPOINT 3.2.0:	<input type="checkbox"/>
BLACKBERRY SERVICE 3.2.0:	<input type="checkbox"/>
HOSTED EXCHANGE 2007 4.7.0:	<input checked="" type="checkbox"/>


PREVIOUS NEXT

2.6 You will be shown all the previously selected services in a list.

HOSTED EXCHANGE 2007 4.7.0

YOU NEED TO SELECT AT LEAST ONE SERVICE COMPONENT.

GENERAL FOR SERVICE

 HOSTED EXCHANGE 2007 COMPONENT

Make sure the box next to the **magenta arrow** icon  is ticked and click **Next**.

2.7 You will now see a summary of the information provided. If you are satisfied that all details are correct, click **Finish**.

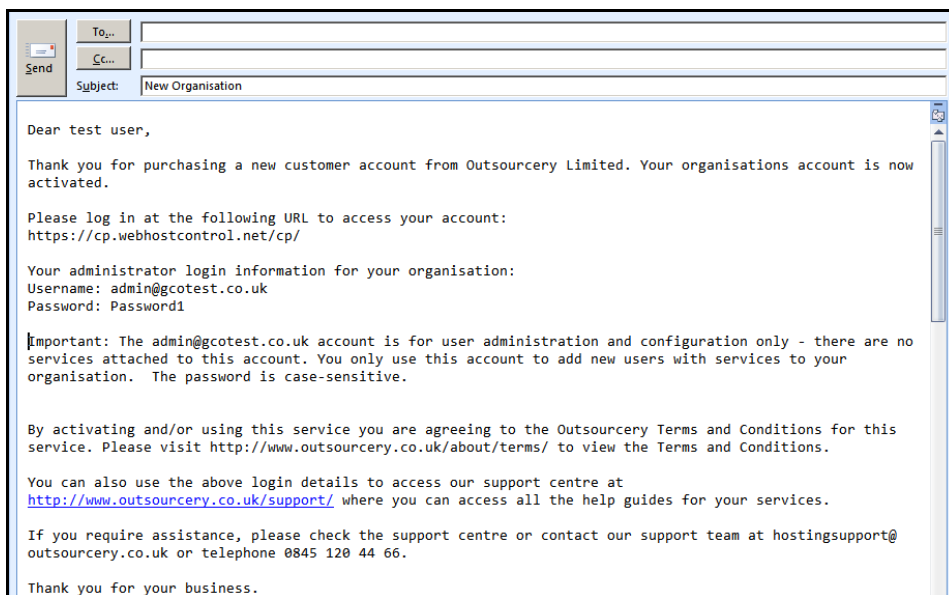
USER ACCOUNT INFORMATION	
GENERAL INFORMATION	
USERNAME:	test
FIRST NAME:	test
MIDDLE NAME:	
LAST NAME:	user
ACCOUNT ENABLED:	✓
ORGANIZATION ADMINISTRATOR PRIVILEGES:	✗
CONTROL PANEL ACCESS ENABLED:	✓
CONTACT INFORMATION	
EXTERNAL EMAIL:	
PHONE:	
DESCRIPTION:	
HOSTED EXCHANGE 2007 4.7.0	
GENERAL FOR SERVICE	

2.8 The services status screen will now appear confirming that the new hosted mailbox has been set up successfully. Click **OK**

Status: Completed
Your task completed successfully. The details are shown below.

ACTION LOG DETAILS	
LOG IDENTIFICATION	
ID:	
USER:	
DURATION:	
LOG DETAILS	
<ul style="list-style-type: none"> [-] ↑ Information: Creating User [trialuser] (8:37 AM) <ul style="list-style-type: none"> ↑ Information: Adding user to Active Directory (8:37 AM) ↑ Information: Adding the user to the Resource Manager. (8:37 AM) ↑ Information: Provisioning user (8:37 AM) [-] ↑ Information: Provision a service Exchange2007 (8:37 AM) <ul style="list-style-type: none"> [-] ↑ Information: Provisioning Mailbox (8:37 AM) <ul style="list-style-type: none"> ↑ Information: Creating Mailbox on Server - EXCCR01store:First Storage Group:Mailbox Database (8:37 AM) ↑ Information: Updated company attribute to gctest.co.uk for the user in Active Directory. (8:38 AM) 	
OK	

- 2.9 The exchange mailbox has now been provisioned and the user will receive a confirmation e-mail to the external e-mail address provided containing their username and password. An example one is shown below:



- Finish -

3. Recommended: Upgrade to Microsoft Outlook 2007

If you haven't already upgraded to Microsoft Outlook 2007, you can download a fully licensed copy as part of your Hosted Exchange Service if you have signed up for the Enterprise Product.

To download Microsoft Outlook 2007, please follow the instructions below:

Note: The following applies only to customers who have purchased the Hosted Exchange 2003 Enterprise Product.

3.1 Go to: <https://www.outsourcery.co.uk/login/?redirect=/members/downloads.cfm#tab-5> and click on the **Support** tab.

3.2 Log in to the Download Centre using your Outsourcery account number and your postcode. These details will be on your order information.

Note: If you are having issues logging in please contact the Technical Support Team on 0843 366 3366 and select option 3 for assistance.

ONLINE SERVICES

MY ACCOUNT HOSTED TRACKING PUK/BUNDLES **SUPPORT** IP PBX BUSINESS PORTAL

SUPPORT LOGIN

To access our download area, you will need to enter your user login details below:

Username/Account No:

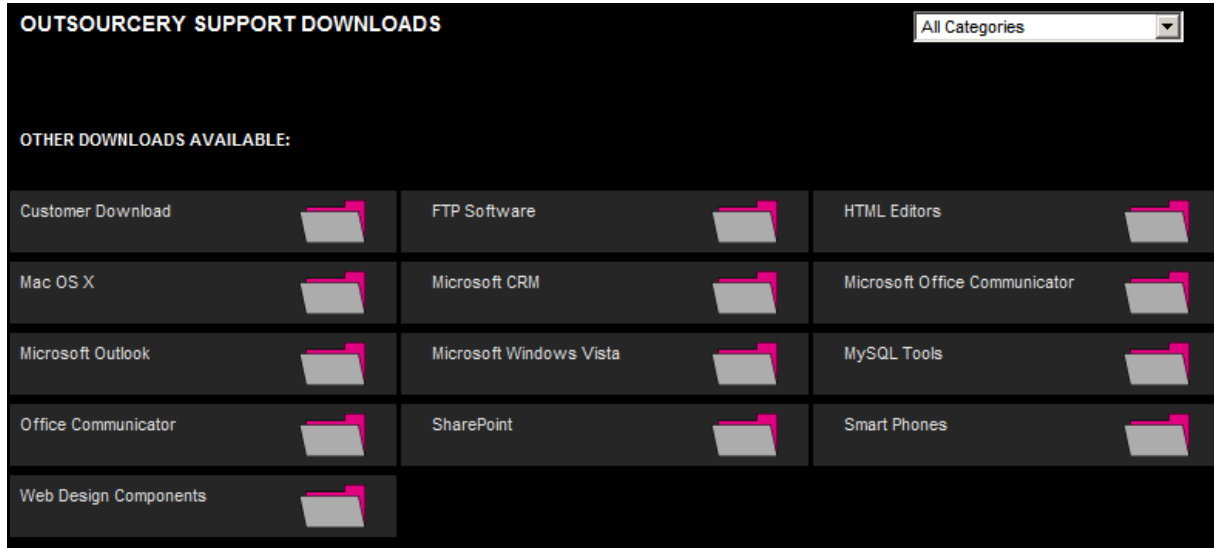
Postcode: *

Password:

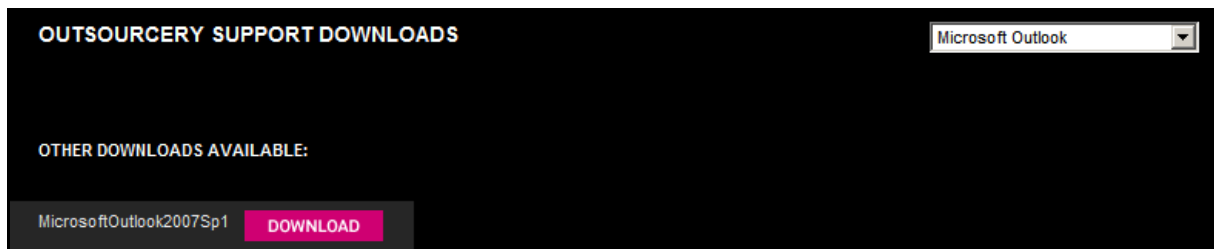
LOGIN →

* Required only when logging in using Outsourcery Account Numbers.

3.3 Click on the **Microsoft Outlook** icon:



3.4 Now click on the **Microsoft Outlook 2007 SP1** download icon and save it to your desktop. The **License Key** is included in the download file.



3.5 Once it is downloaded, you will need to extract the setup files into a folder of your choice. The files are stored in a .zip format – Windows itself can extract these files or you can use an application such as WinZip.

3.6 Next run the **Setup** file to install Outlook 2007, you be asked for the license key during installation.

3.7 Once Microsoft Outlook is installed, you follow the next section to configure an exchange e-mail account into Outlook 2007.

4. Configuring Outlook 2007 for a Hosted Exchange 2003 Account

Note: This guide assumes you have signed up for the Hosted Exchange Service and now wish to configure your Hosted Exchange service with Microsoft Outlook 2007.

- Start -

4.1 If you have Microsoft Outlook running, please close it down before commencing. It's recommended you have the latest copy of Microsoft Outlook 2007, you can download it from our support centre before commencing with this guide. (See section 2)

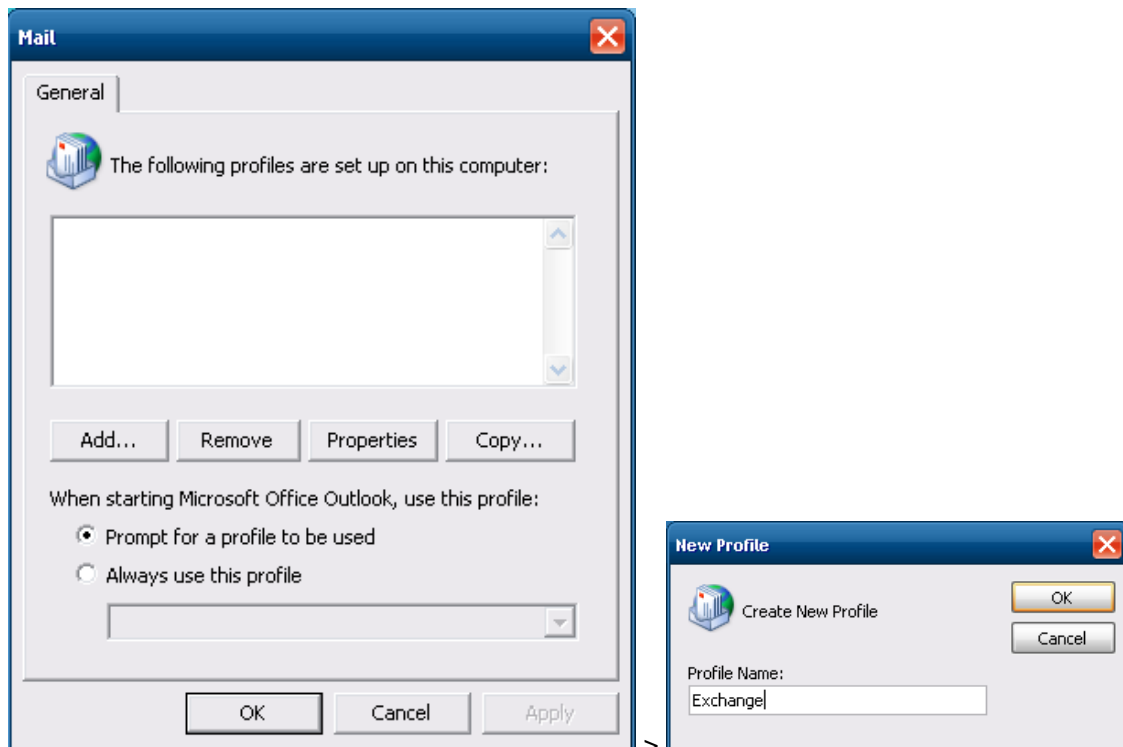
Please be aware that this copy of Microsoft Outlook 2007 is only licensed for your use in conjunction with our service.

4.2 The following steps explain how to setup Outlook 2007:

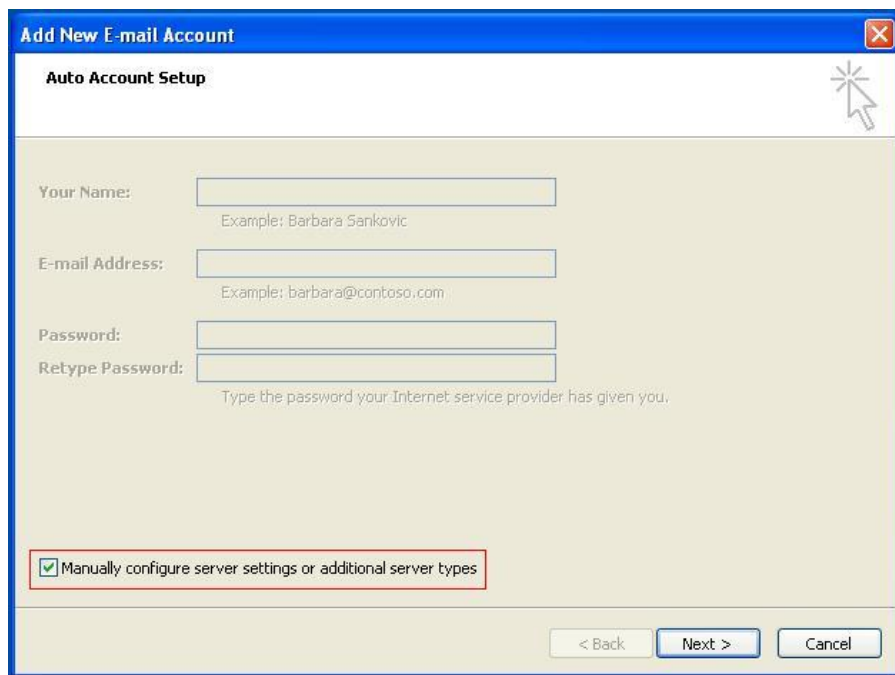
4.2.1 On your Windows Desktop select **Start > Settings > Control Panel > Mail**, click on **"Show**



4.2.2 On the new window, select **'Prompt for profile to be used'** and then click **Add**. Name the profile "Exchange" or your name (This is only what it will appear as when you log on.) Press ok.

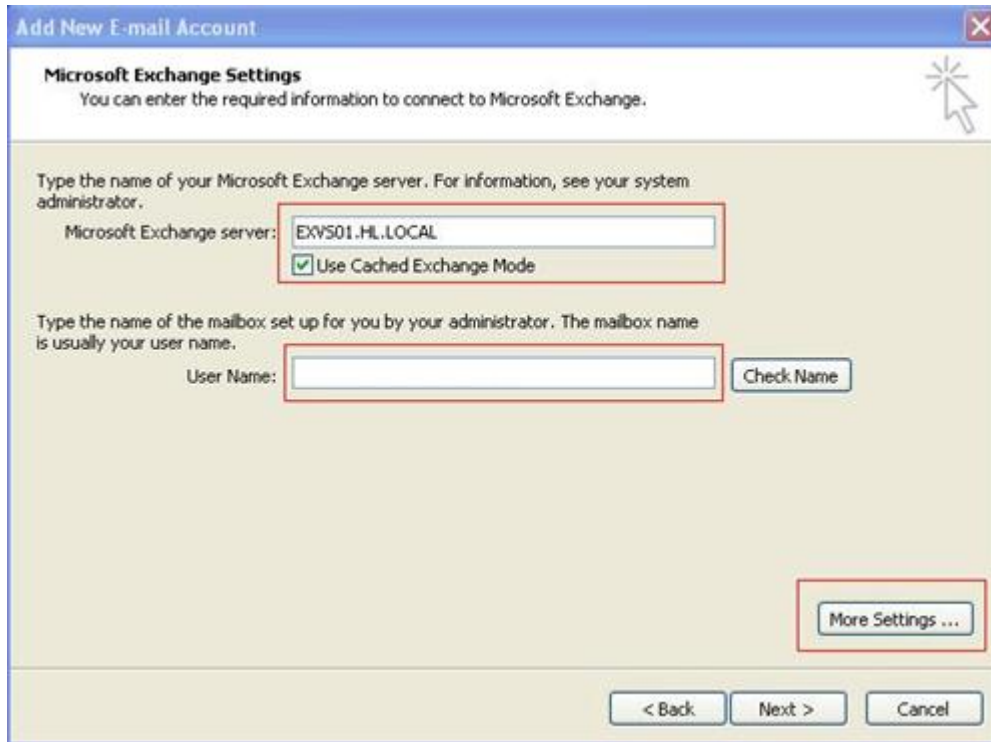


4.2.3 The auto account setup screen will appear, click **'Manually configure server settings or additional server types'** in the bottom left of the menu, and then click **next**.



4.2.4 Select **Microsoft Exchange**, and click on **Next**.

- 4.2.5 In the Microsoft Exchange server field type **EXVS01.HL.LOCAL** and in the User Name field type the e-mail that you want to use. This would be the user account configured via the Genesis Control Panel. E.g. user@domain.com. Once done click **More Settings**.



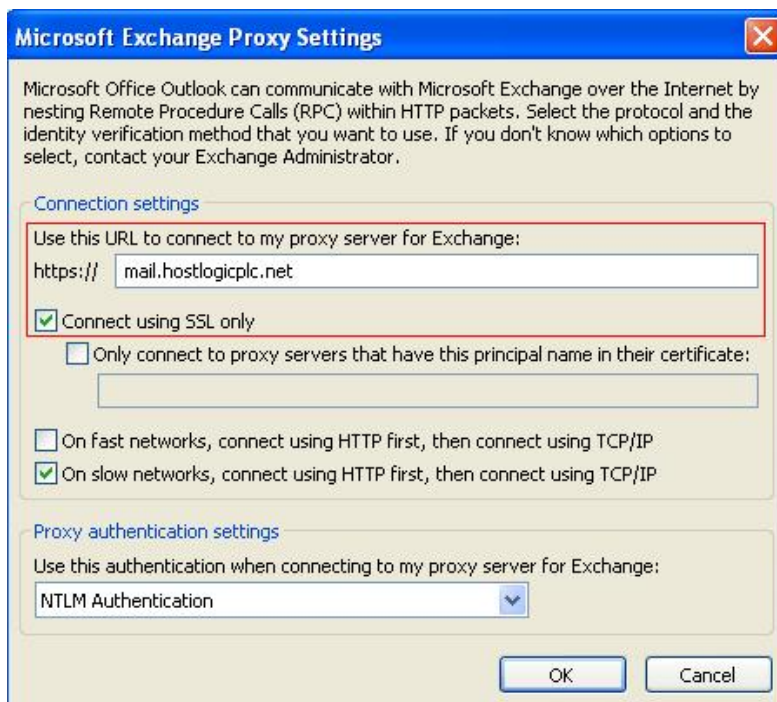
- 4.2.6 **Warning:** An error message will occur. This is completely normal because Outlook will try to Test the account settings, but it will be unable to reach the account because the proxy settings have not been entered yet. **The error can simply be ignored.**



- 4.2.7 Dismiss the error message and any other pop-up windows and then click on **More Settings**.
- 4.2.8 Go to the **Connection tab** and put a tick into the box next to **'Connect to Exchange mailbox using HTTP'**, and click **Exchange Proxy Settings**.



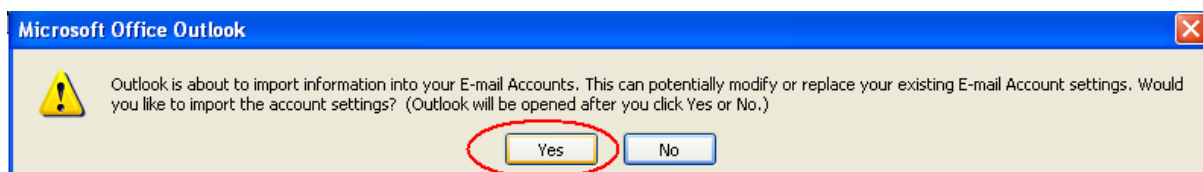
4.2.9 In the first box type mail.hostlogicplc.net and make sure there is a tick next to “**Connect using SSL Only**”. Click **OK** to exit the window. You don't need to change anything else on this screen.



4.2.10 Finally click **Apply** and **OK**, then **Next** and **Finish**. Your Hosted Exchange is now configured for use. You can now close **Mail** and the **Control Panel**.

4.2.11 To use the newly setup account simply open Outlook 2007 and select your Profile.

4.3 You can now start your Microsoft Outlook 2007. When it runs, you may see the following message below. Please click on the **Yes** button.



4.4 A login box will appear, if it is populated with any details clear them. You need to enter your full e-mail address and password for your new Exchange account.

4.5 Outlook setup is now complete. Outlook will download any e-mail and other mailbox items you already have on your Exchange mailbox. The time this can take depends on the amount of information on the mailbox sever. Once you see the following message in the bottom left hand corner, Outlook is ready for use:



Note: Image way differ if you're using other versions of Outlook

- Finish -

5. How to login to Outlook Web Access (OWA)

All hosted exchange mail accounts will have Outlook Web access already enabled on their account. This means you can access your hosted exchange mail anywhere in the world, even without Outlook setup.

Note: In order to have full access to the same features as Outlook, you will need to load OWA in Internet Explorer. OWA will work on other web browsers like Firefox, but you will only get limited features.

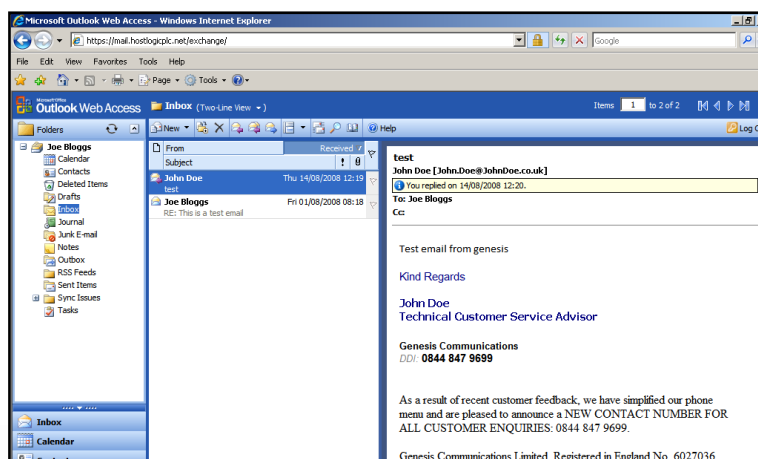
To access your hosted exchange using Outlook Web Access, please do the following:

5.1 Go to the web link: <https://mail.hostlogicplc.net/> - a login screen will load, this is show below:



5.2 Next enter your **e-mail address** and **password**, this is the same as the one used for normal Outlook. Click **Log On**

5.3 OWA will then load up your Hosted Exchange mailbox – an example is shown below:



6. BlackBerry Enterprise Service - Configuring a BlackBerry handset to use Hosted BES

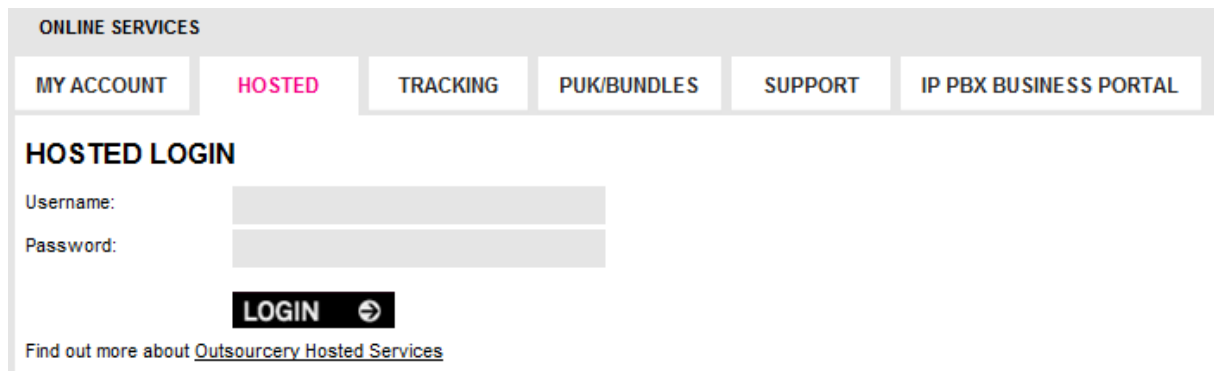
Note: This guide assumes you have signed up for the Hosted Exchange Service and BlackBerry Enterprise Service and now wish to configure your BlackBerry Phone to use BlackBerry Enterprise Service.

Before you start this section of the guide, you should telephone your mobile service provider: E.g. Vodafone, O2, T-Mobile, Orange, etc. Ask them if the BlackBerry device has BlackBerry Enterprise service enabled, if they say it hasn't then ask them to switch your BlackBerry on to the **BlackBerry Enterprise Service**. If your provider is Outsourcery then please call the Customer Support Team on 0843 366 3366 to have this done.

- Start -

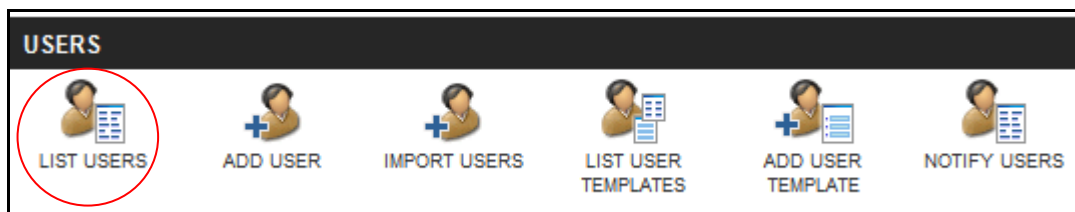
6.1 Go to <https://www.outsourcery.co.uk/login/> and click on the **Hosted** tab.

6.2 Login to the control panel using your administrator username and password (in the format: admin@yourdomain).



Your password is what was agreed at the Pre Connect Courtesy Call and should be on the signed contract. If you have forgotten this, please e-mail in to hostingsupport@outsourcery.co.uk and the password will be resent to the account holders e-mail address.

6.3 Once you're on the control panel, click on the **List Users** icon.



6.4 You should then see a list of all users currently setup within your Organisation as shown in the example below:

The screenshot shows the 'USERS' management page. At the top, there are tabs for 'USERS', 'TEMPLATES', 'NOTIFY USERS', and 'MASS EMAIL'. Below the tabs is a search area with a 'SHOW:' dropdown set to 'NAME', a search input field, and checkboxes for 'ENABLED' and 'DISABLED', followed by a 'GO' button and a 'SHOW ALL' button. A navigation bar contains links for 'ADD USER', 'IMPORT USERS', 'OVERVIEW', 'REMOVE', 'EDIT', 'USER ACTIONS', and 'AUTO LOGIN'. The main content is a table with columns: 'STATUS', 'ADMIN', 'NAME', 'USERNAME', and 'SERVICES'. The table lists three users: 'Administrator' (username: admin@qcotest.co.uk), 'test user' (username: test@qcotest.co.uk), and 'trial user' (username: trialuser@qcotest.co.uk). Below the table are 'CHECK ALL' and 'CLEAR ALL' buttons, a '10' items per page selector, and 'PAGE [1]'.


6.5 You now need to select the user by clicking on their name and then click on **add services**:

The screenshot shows the 'SERVICES' management page. At the top, there are tabs for 'OVERVIEW' and 'SERVICES'. Below the tabs is a navigation bar with links for 'ADD SERVICES', 'OVERVIEW', 'EDIT', and 'REMOVE'. The main content is a table with columns: 'SERVICE' and 'VERSION'. The table lists one service: 'Hosted Exchange 2007' with version '4.7.0'. Below the table is a '10' items per page selector and 'PAGE [1]'.

6.6 You will now see the screen below:

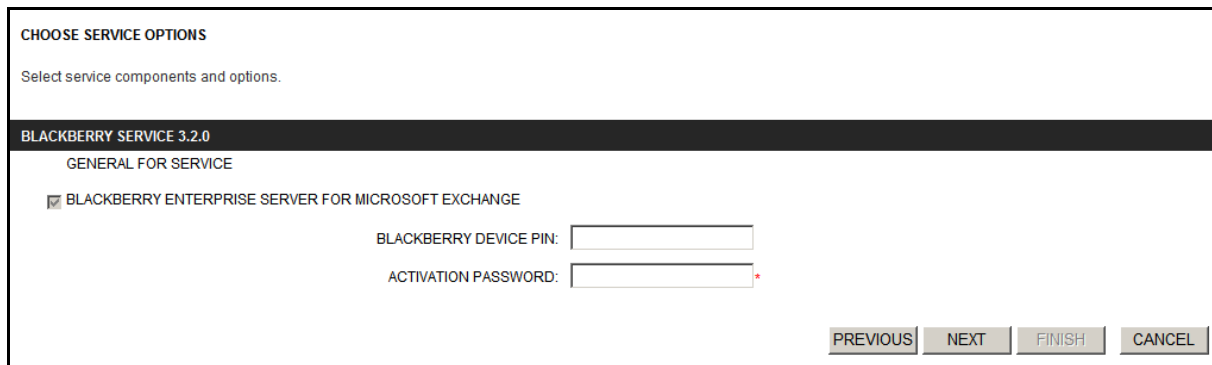
The screenshot shows the 'AVAILABLE SERVICES' selection screen. At the top, it says 'AVAILABLE SERVICES' and 'Select the services to enable for the user.' Below this is a table with columns: 'SERVICE' and 'SELECTED'. The table lists three services: 'HOSTED CRM 4.0 SERVICE 1.0.0:' (checkbox unchecked), 'SHAREPOINT 3.2.0:' (checkbox unchecked), and 'BLACKBERRY SERVICE 3.2.0:' (checkbox checked). At the bottom right, there are four buttons: 'PREVIOUS', 'NEXT', 'FINISH', and 'CANCEL'.

6.7 Tick the box next to **BlackBerry Service** click **next**

6.8 On the next screen click on the **magenta arrow** icon  and you will see the screen below. Please enter your BlackBerry Pin number and enter an activation password in the boxes and click next. You can leave the PIN field blank, if you're unsure of what the PIN number is.

Note: Your BlackBerry Device PIN is an 8 digit, alpha-numeric number located in your BlackBerry phone – usually in the [Options > Status](#) section.

The activation password can be anything you like but we recommend you keep it simple such as [qaz](#). The password is temporary and will expire after 48 hours. You will need to set another activation password after this time.



CHOOSE SERVICE OPTIONS

Select service components and options.

BLACKBERRY SERVICE 3.2.0

GENERAL FOR SERVICE

BLACKBERRY ENTERPRISE SERVER FOR MICROSOFT EXCHANGE

BLACKBERRY DEVICE PIN:

ACTIVATION PASSWORD:

PREVIOUS NEXT FINISH CANCEL

6.9 Simply click on **Next** then **Finish** on the following screen. This will then configure that user for BlackBerry Enterprise Service.

6.10 Once you have confirmation that your BlackBerry has been switched over to the BlackBerry Enterprise Service, you can activate BlackBerry Enterprise service by going to the following on your handset:

1. On the Home screen, click **Options / Settings** (Depends on your current BlackBerry Theme)
2. Select **Advanced Options > Enterprise Activation**

6.11 You will then need to enter your e-mail address and your activation password. Please enter your full e-mail address (as configured on your Hosted Exchange account) and the activation password you chose in 5.5.

6.12 Finally press the  button and select the option **Activate**.

6.13 Your BlackBerry Enterprise Service should now be active and you should see e-mails, addresses and calendar items start to synchronise between your BlackBerry and your Hosted Exchange account. Sometimes, this can take up to 30 minutes to complete depending on conditions.

- Finish -

Troubleshooting

If your BlackBerry fails to synchronise, there are three things to check:

- 1) Make sure that your BlackBerry is definitely switched over to the BlackBerry Enterprise Service by your mobile phone provider and not using the “BlackBerry Internet Mail” only service.
- 2) Make sure you have configured your BlackBerry Enterprise Service correctly on the control panel. To do this, log into the control panel using your own username and password (not the admin) and click on the “BlackBerry Overview” button to check your settings.
- 3) Re-run the **Enterprise Activation** on your BlackBerry device, making sure both the email address and activation password is correct.