

## Hosted Exchange 2007 Quick Start Guide

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### Step-by-Step Guide to Account Set-up & Administration on the 2007 Platform

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## 1. Checking and changing your domain MX Records to point to your Hosted Exchange 2007 Service

1.1 You or your domain host will need to change your domain's MX records to point to your Hosted Exchange 2007 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: **mx.msexchange2007.com**.
- 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 the Outsourcery Support Centre DNS tools section: <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 = mx.msexchange2007.com**

**OUTSOURCERY SUPPORT TOOLS**

**DNS LOOKUP**

Domain: gctest.co.uk

Record: MX

Go

**DNS LOOKUP RESULTS**

Server: UnKnown  
Address: 172.19.1.113

gctest.co.uk MX preference = 10, mail exchanger = mx.msexchange2007.com

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 your domain host cannot make these changes for you, then please contact the Technical Support Team on 0843 366 3366 select Option 3 for assistance.

## 2. Creating a CNAME record for Exchange 2007 Autodiscover Service

2.1 You or your domain host will need to create a **CNAME record** in order for Exchange 2007 to work correctly. Autodiscover will allow you to quickly and easily configure Outlook for Exchange 2007. Not having Autodiscover will cause problems at a later point, so it's highly recommended that a **CNAME record** is created.

A CNAME record can be created by your current domain host or by Outsourcery if we host the domain for you. We recommend you ask your domain host to create the CNAME record for you (If need be), to avoid mistakes.

A CNAME record must be created as follows:

- **CNAME = autodiscover.yourdomain.com.** Pointing to -> **autodiscover.msexchange2007.com.**
- For example: **autodiscover.gctest.co.uk.** Pointing to -> **autodiscover.msexchange2007.com.**

If your host doesn't allow the above setup then you may need to do the following instead:

- **CNAME = Autodiscover** Pointing to -> **autodiscover.msexchange2007.com.**

**Note:** If your host doesn't support CNAME records or if you are having difficulties with implementing the CNAME record on your domain control panel, you can contact the technical support team for advice. Please call the technical support team on 0843 366 3366 and select Option 3 for assistance.

2.2 The CNAME record will take between 12 - 48 hours to propagate throughout the Internet. The time it takes depends on your domain host and will vary. You can check if the propagation is completed by doing a NSLOOKUP from the Outsourcery Support Centre DNS tools section: <http://www.outsourcery.co.uk/support/tools/>

2.3 Enter **autodiscover.yourdomain.com** in the domain field of DNS Lookup and change the record type to **'CNAME'** and then click **'Go'**. The CNAME record should show as:

**autodiscover.yourdomain.com canonical name = autodiscover.msexchange2007.com**

**OUTSOURCERY SUPPORT TOOLS**

**DNS LOOKUP**

Domain:

Record:

**WHOIS**

Domain:

**DNS LOOKUP RESULTS**

Server: UnKnown  
Address: 172.19.1.113

autodiscover.gctest.co.uk canonical name = autodiscover.msexchange2007.com

2.4 If it doesn't, your CNAME record has not been created yet, is incorrectly pointing to the wrong location or is still propagating.

You will need to speak to your current domain host, and then ask them to create or check that there is a CNAME record pointing to the 2007 Exchange server. If Outsourcery is your domain host, then we can do this for you.

**Note:** If you are unsure of how to action the above or if your domain host cannot make these changes for you, then please contact the technical support team on 0843 366 3366 and select option 3 for assistance.

### 3. Adding a new user to an existing organisation and assigning Exchange 2007 service to that user

You can begin this section of the guide once your Exchange 2007 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.**

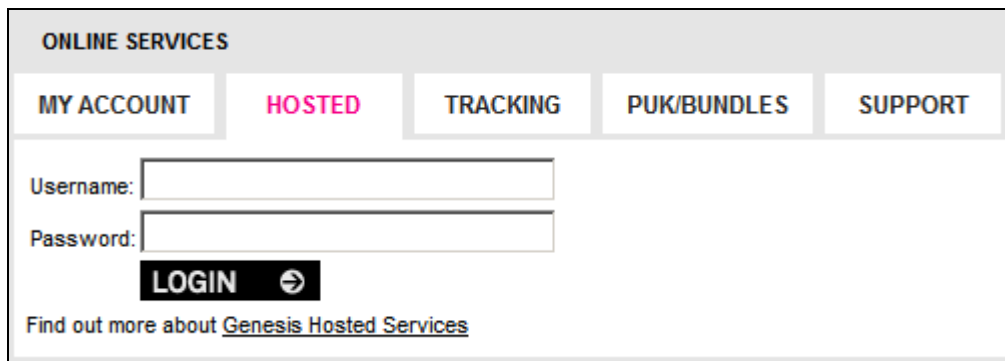
**Note: Additional users can be given Administration access, but Outsourcery recommends you only use the admin login for admin tasks.**

In this guide, we will log in as an administrator and add an additional user to an existing organisation.

#### - Start -

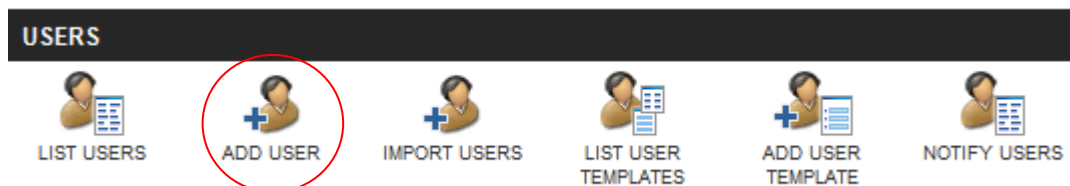
3.1 Go to: <https://www.outsourcery.co.uk/login/> and click on the **Hosted** tab.

3.2 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](mailto:hostingsupport@outsourcery.co.uk) and the password will be resent to the account holders e-mail address.

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



3.4 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.**

The sections are explained as follows:

**User Information:**

- **Template:** Select the template mailbox required for the user you are adding. There is a mailbox template for each type of mailbox we offer; Core/Standard/Enterprise. This function creates the mailbox for you.

**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**.

3.5 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 2007' and click **next**.

The screenshot shows a web form for creating a user. It is divided into four sections:
 

- USER INFORMATION:** Contains a 'TEMPLATE' dropdown menu set to '[NO TEMPLATE]'. A red arrow points to this dropdown.
- GENERAL INFORMATION:** Contains fields for 'USER NAME' (with '@gotest.co.uk' as a suffix), 'FIRST NAME', 'MIDDLE NAME', and 'LAST NAME'.
- ACCESS CONTROL:** Contains checkboxes for 'AUTO GENERATE PASSWORD', 'ORGANIZATION ADMINISTRATOR PRIVILEGES', and 'CONTROL PANEL ACCESS ENABLED' (which is checked). It also has a date picker for 'ACCOUNT EXPIRES' set to 7/8/2009.
- CONTACT INFORMATION:** Contains fields for 'EXTERNAL EMAIL', 'PHONE', and a 'DESCRIPTION' text area.

The screenshot shows the 'AVAILABLE SERVICES' section of the form. It contains a single entry: 'HOSTED EXCHANGE 2007 4.7.0' with a checked checkbox. At the bottom right, there are two buttons: 'PREVIOUS' and 'NEXT'.

3.6 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**.

3.7 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:

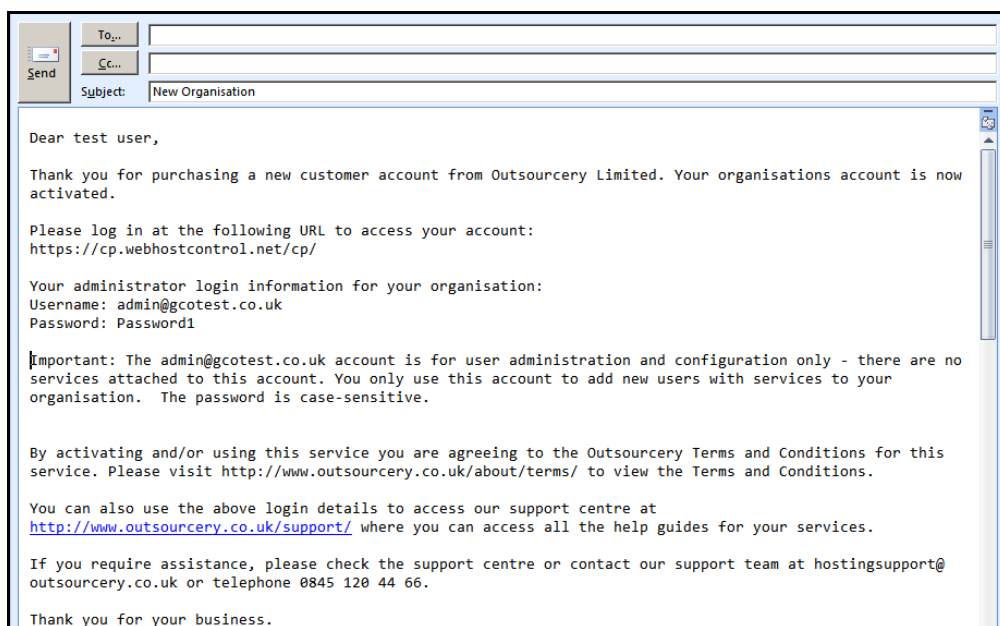
**HOSTED EXCHANGE 2007 4.7.0**

GENERAL FOR SERVICE

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



- 3.9 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 -**

## 4. 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. You will need Outlook 2007 in order to use Exchange 2007 services correctly.

**Note: Exchange 2007 will work with Outlook 2003, but we cannot guaranty performance or that all services will work correctly. Certain sections of this guide will vary if you are using other versions of Outlook other then Outlook 2007.**

**It's highly recommend you upgrade to Microsoft Outlook 2007. In addition to having numerous improvements over older versions, Outlook 2007 is the only version of the outlook client that is able to be configured to work with the Autodiscover service.**

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

**Note:** The following applies only to customers who have purchased the Hosted Exchange 2007 Enterprise Product.

- 4.1 Go to: <https://www.outsourcery.co.uk/login/?redirect=/members/downloads.cfm#tab-5> and click on the **Support** tab.
- 4.2 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**

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

Username/Account No:

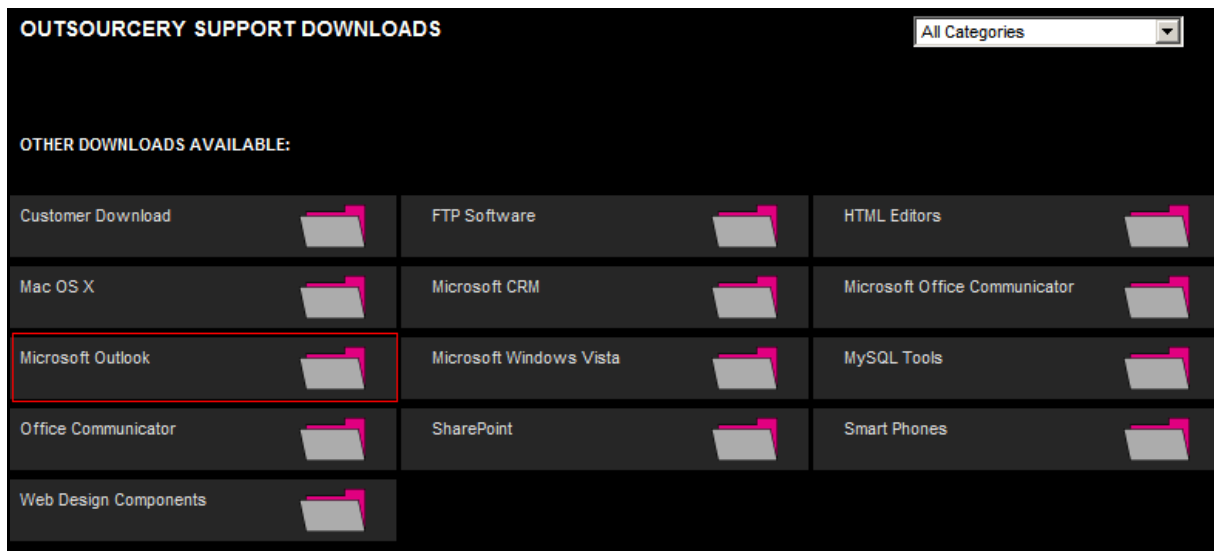
Postcode: \*

Password:

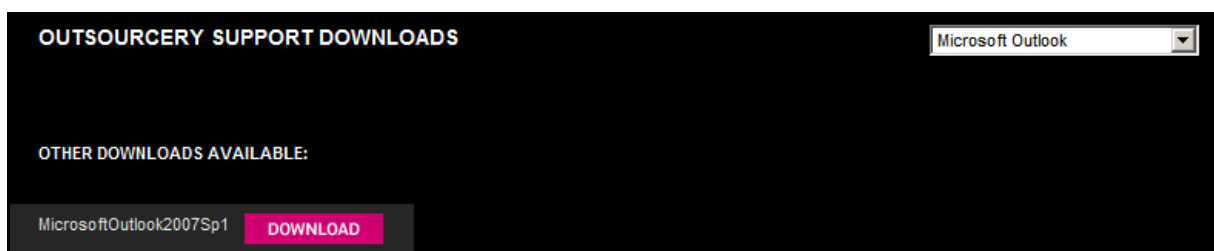
**LOGIN** 

\* Required only when logging in using Genesis/Outsourcery Account Numbers.

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



4.4 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.



4.5 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.

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

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

## 5. Configuring a Hosted Exchange 2007 account in Outlook 2007

If you have Microsoft Outlook running, please close it down before commencing. You must upgrade to Microsoft Outlook 2007, as Autodiscover will only work in Outlook 2007. You can download it from our support centre before commencing with this guide (see previous section). The manual method of configuration will cause problems and should only be used as a last resort. Please contact the Technical Support Team before using the manual method.

There are two different means of configuring an Exchange 2007 account in Outlook 2007:

- Using an Autodiscover CNAME record
- Manually configuring it using server details (Not recommended – more details on [page 16](#))

Its highly recommend to use the Autodiscover configuration method, as this will give you full access to the features of Exchange 2007.

If the Autodiscover is not available to you due to your domain host not supporting CNAME records, then you will need to use the manual configuration method. This method is not recommended.

**Note: Not all domain hosts support or provide CNAME entry support, you will need to use the manual method. This will cause some problems, but will still allow you to use your Hosted Mail. If you current host doesn't support CNAME records it's recommend to consider alternative hosts which do.**

### Autodiscover Setup Method

5.1 Once you have confirmed the **CNAME record** has been created, you can configure the Exchange 2007 mailbox / profile in Outlook 2007 by doing the following:

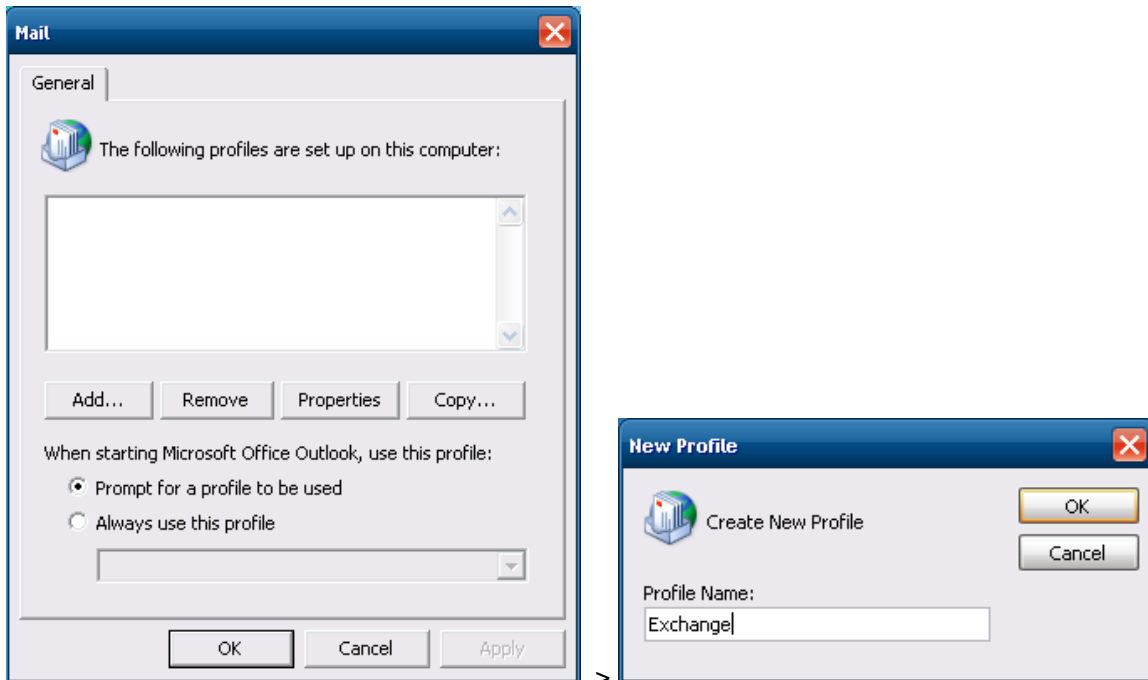
5.1.1 First make sure that Outlook 2007 is not running.



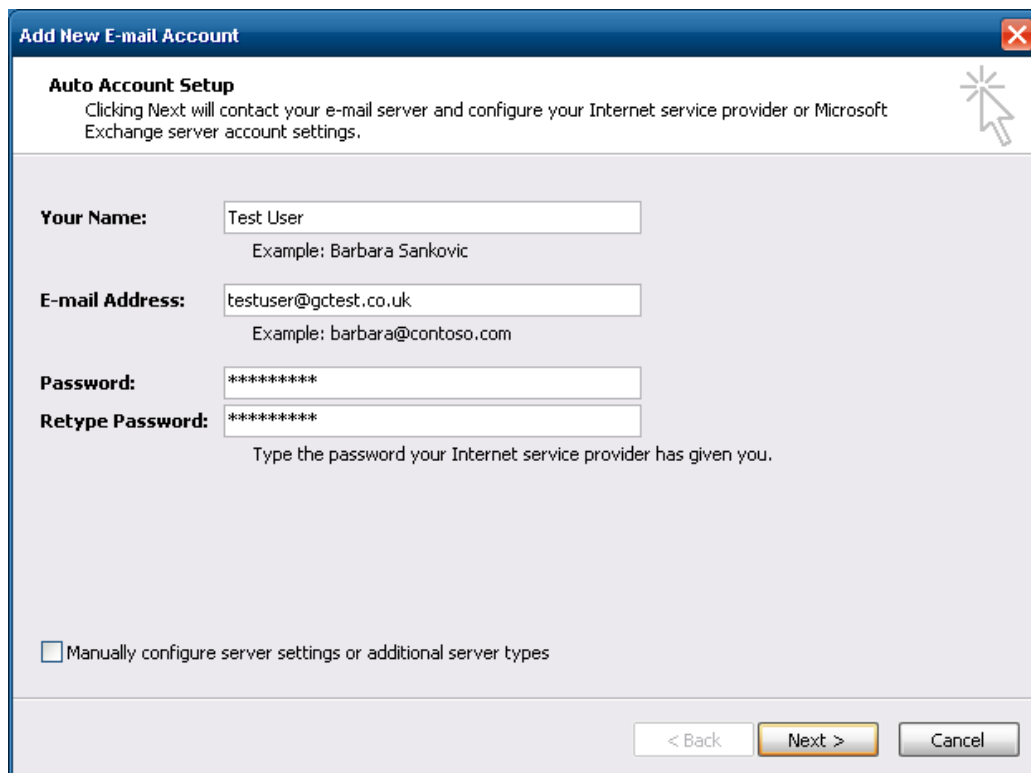
5.1.2 Select **Start > Settings > Control Panel > Mail**, click on **“Show Profiles”**: Mail



5.1.3 On the pop-up screen select **Prompt for profile to be used** and then select **Add**. Call the profile Exchange or a name of your choice; this will only appear on your computer.



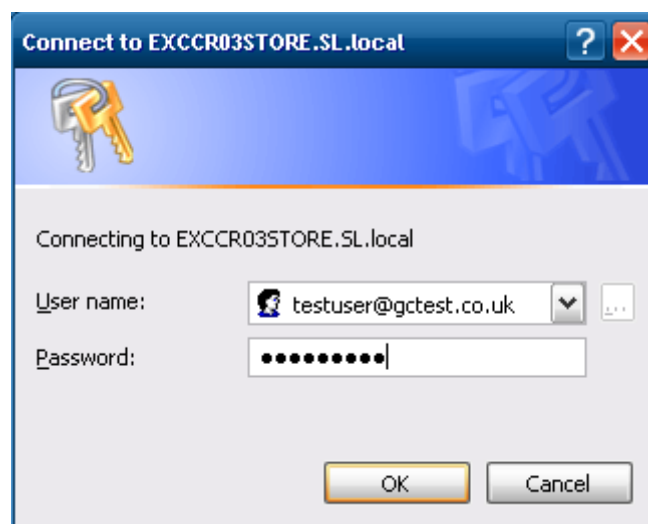
5.1.4 Now you need to **enter your name, e-mail address and password** as it is configured on the Outsourcery Control Panel. An example is shown below:



- 5.1.5 Once all the details have been entered and confirmed to be correct, click **Next**
- 5.1.6 It will begin searching for the user account settings on the Exchange server, this process can take a couple of minutes. During the search a **Security Alert** will pop-up regarding **Autodiscover**, this is normal and isn't a problem:

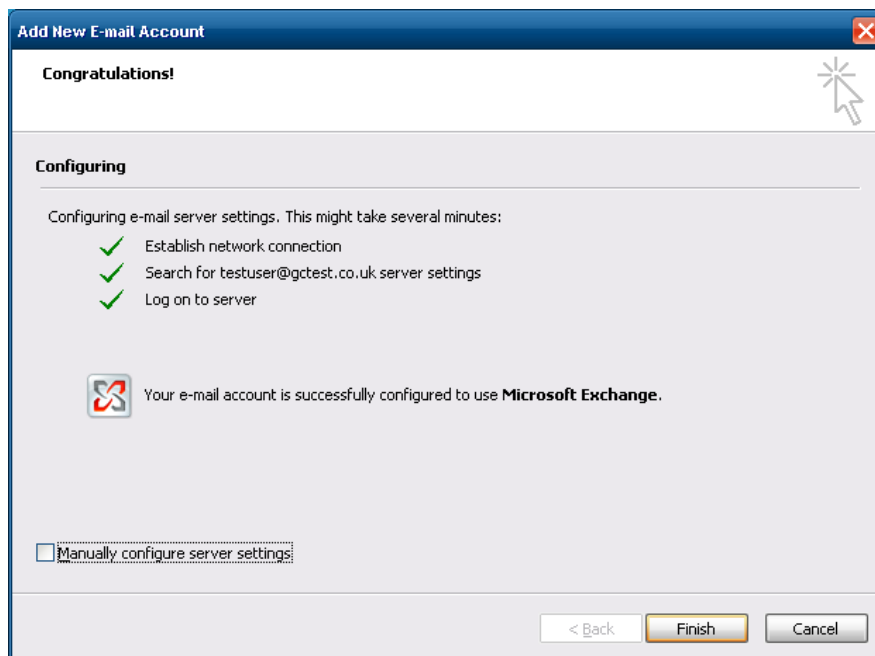


- 5.1.7 Ignore the alert and click **Yes**
- 5.1.8 A **login box** will pop-up on screen, clear anything that is already populated in it. Then type in your full email address and password and click OK:



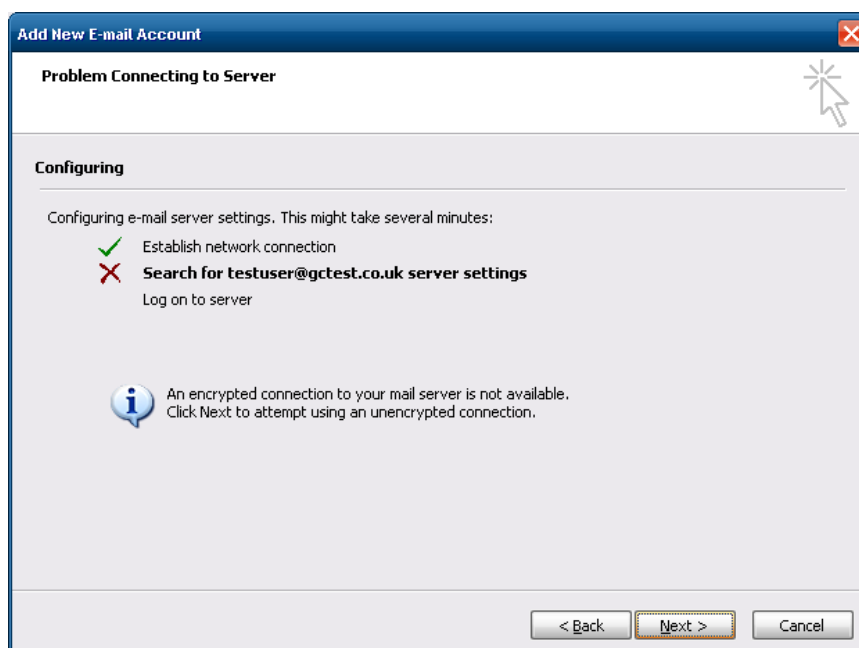
- 5.1.9 Another **login box** may pop-up on screen; just enter the details again if this happens.

5.1.10 If an Autodiscover CNAME record has been correctly created you will see the screen below:



5.1.11 Once it's completed click **Finish** and your new hosted mail account is ready for use.

5.1.12 If however you haven't got an Autodiscover CNAME record created yet or setup correctly you will see the screen below. This needs to be corrected before setup can be completed. Clicking **Next** for unencrypted connection will not work.



5.1.13 Once it's completed click **Finish** and your new hosted mail account is ready for use.

## Manual Configuration Method

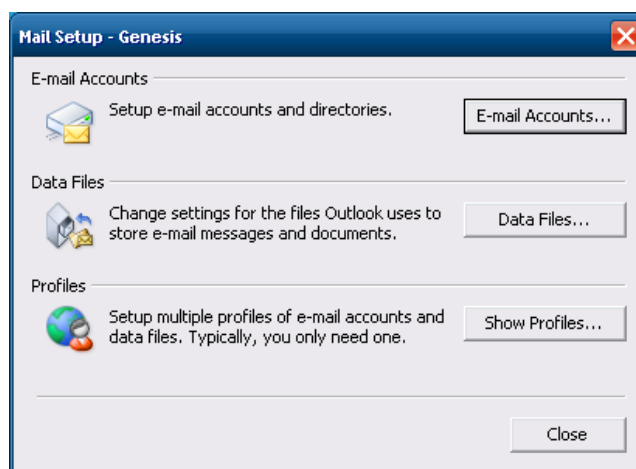
(Use only if Autodiscover isn't working or you're using an older version of Outlook):

5.2 If the Autodiscover **CNAME record** method isn't working you can still setup your Hosted Exchange 2007 profile in Outlook 2007 by doing the following:

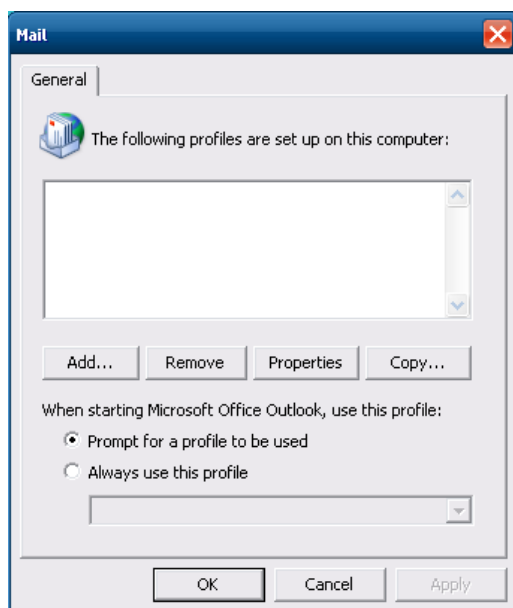
5.2.1 First make sure that Outlook 2007 is not running.



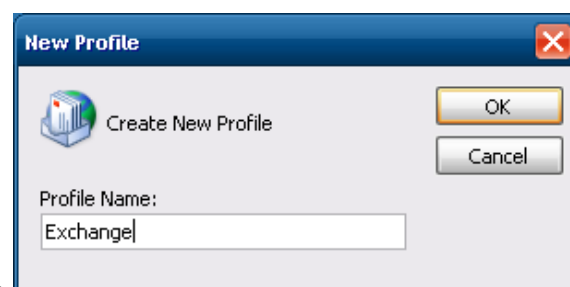
5.2.2 Select **Start > Settings > Control Panel > Mail**, click on **"Show Profiles"**: Mail



5.2.3 On the pop-up screen select **Prompt for profile to be used** and then select **Add**. Call the profile Exchange or a name of your choice; this will only appear on your computer.



>



5.2.4 The 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**.

**Add New E-mail Account**

**Auto Account Setup**

Your Name:   
Example: Barbara Sankovic

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

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

Manually configure server settings or additional server types

< Back   Next >   Cancel

5.2.5 Select **Microsoft Exchange**, and click on **Next**

5.2.6 In the Microsoft Exchange Server box, type in: **exccr03store.sl.local**. In the user name box type the e-mail that you want to configure. This would be the e-mail address of the mailbox configured via the Outsourcery Control Panel. E.g. **user@domain.com**. Once done click **More Settings**.

**Change E-mail Account**

**Microsoft Exchange Settings**  
You can enter the required information to connect to Microsoft Exchange.

Type the name of your Microsoft Exchange server. For information, see your system administrator.

Microsoft Exchange server:   
 Use Cached Exchange Mode

Type the name of the mailbox set up for you by your administrator. The mailbox name is usually your user name.

User Name:  Check Name

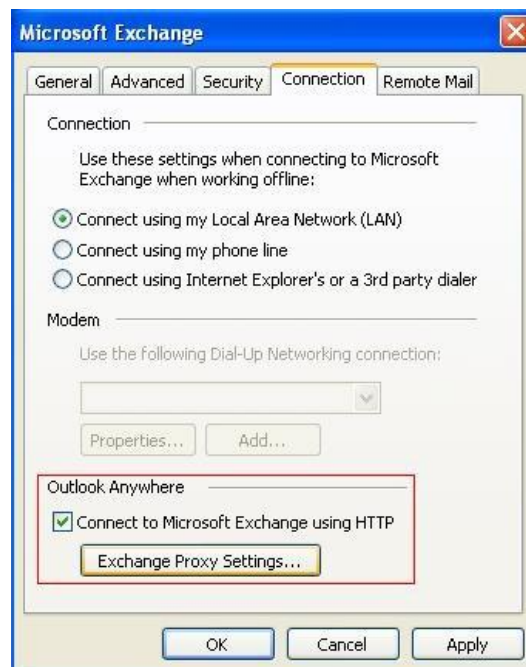
More Settings ...

< Back   Next >   Cancel

- 5.2.7 **Warning:** An error message will occur. This is completely normal because Outlook 2007 will automatically try to test the account settings entered, but it will be unable to reach the mailbox because the proxy settings have not been entered yet. **The error can simply be ignored, simply clear it and any other windows off the screen that pop-up.**



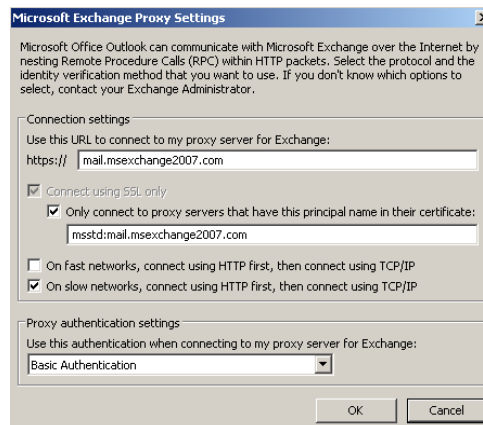
- 5.2.8 Dismiss the error message and any other pop-up windows and then click on **More Settings**.



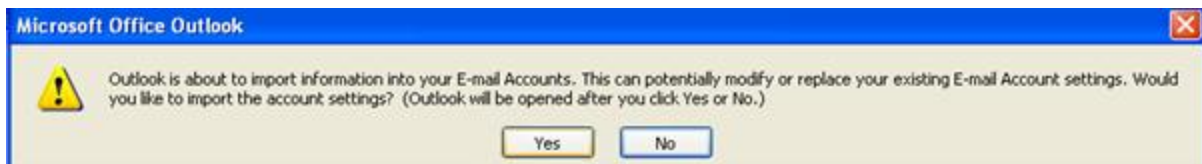
- 5.2.9 In the More Settings window, Go to the Connection tab and put a tick into the box next to **Connect to Exchange mailbox using HTTP** under the Outlook Anywhere section. Next click the Exchange Proxy Settings button.

- 5.2.10 In the first box enter: **mail.msexchange2007.com** and tick **Connect using SSL Only**. Also place a tick in the **Only Connect to proxy servers that have this principal name in their certificate**.

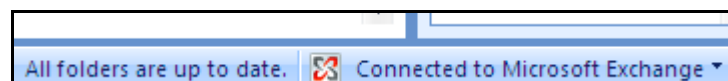
In the second box enter: **msstd:mail.msexchange2007.com**. Set the proxy authentication to **Basic Authentication**, all other settings can be left as default. Click **OK**.



- 5.2.11 Click **Apply** and **OK**, then **Next** and **Finish**. Your Hosted Exchange is now configured for use, simply open Outlook and select your profile.
- 5.2.12 To use the newly setup account simply open Outlook 2007 and select your profile.
- 5.2.13 You can now start your Microsoft Outlook 2007. When it runs, you may see the following message below. Please click on **Yes**.



- 5.2.14 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.
- 5.2.15 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:



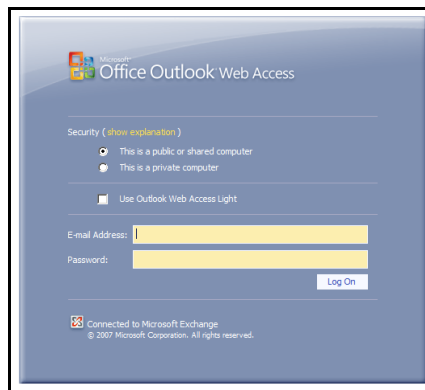
## 6. How to login to Outlook Web Access (OWA)

All hosted exchange mail accounts will have Outlook Web access already enabled on their mailbox account. This means you can access your hosted exchange mail anywhere in the world, without having to use an Outlook client. OWA gives you access to a web-based version of Outlook 2007, allowing you to configure features such as Out of Office and signatures.

**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.**

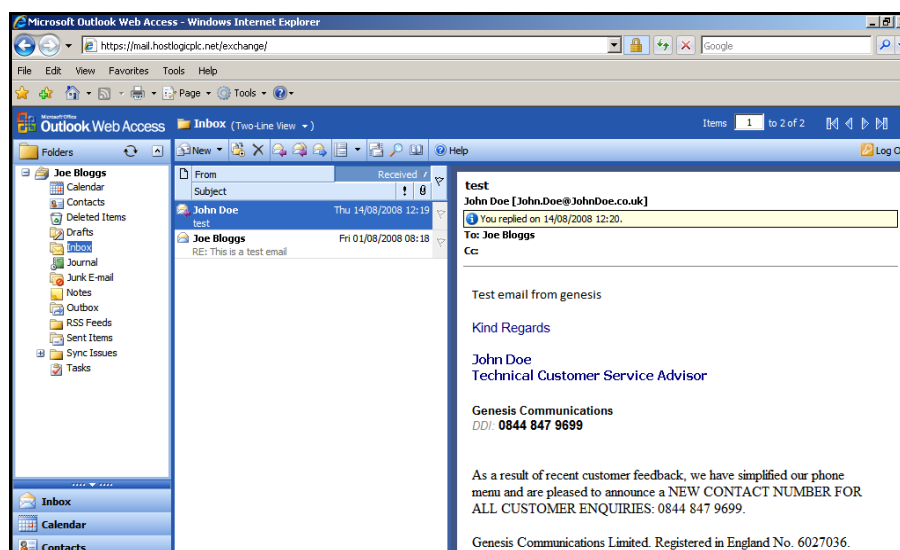
To access your hosted exchange using Outlook Web Access, please do the following:

6.1 Go to the web link: <https://mail.msexchange2007.com/owa> - the login screen is shown as below:



6.2 Next enter your **e-mail address** and **password**, this is the same as your outlook credentials then click **Log On**

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



## 7. 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 technical support team on 0843 366 3366 and select option 3 to have this done.

### - Start -

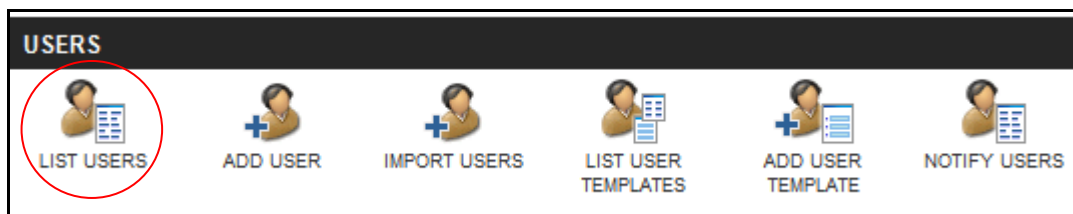
7.1 Go to <https://www.outsourcery.co.uk/login/> and click on the **Hosted** tab.

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

Genesis Hosted Services'." data-bbox="193 457 829 619"/>

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](mailto:hostingsupport@outsourcery.co.uk) and the password will be resent to the account holders e-mail address.

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




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

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

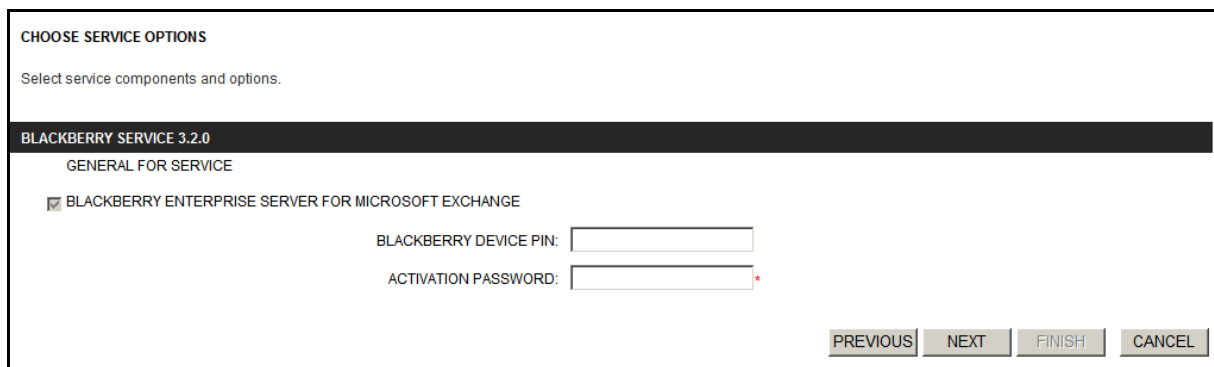
7.6 You will now see the screen below:

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

7.8 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.**



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

7.10 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**

7.11 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.

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

7.13 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.