

Outlook®  
Configuration Tool User Guide

# Table of Contents

|  |           |
|--|-----------|
| <b>Introduction.....</b>               | <b>3</b>  |
| <b>System Requirements .....</b>       | <b>4</b>  |
| <i>Software Requirements: .....</i>    | <i>4</i>  |
| <i>Additional Requirements:.....</i>   | <i>4</i>  |
| <b>Step-by-Step Instructions .....</b> | <b>5</b>  |
| <i>Login Process: .....</i>            | <i>5</i>  |
| <i>Selecting a Protocol:.....</i>      | <i>7</i>  |
| <i>MAPI Protocol:.....</i>             | <i>8</i>  |
| <i>POP3 and IMAP Protocol:.....</i>    | <i>12</i> |
| <i>Update Hosts File Only:.....</i>    | <i>17</i> |

## Introduction

The Outlook Configuration Tool (OCT) is a web-based tool that allows users to automatically configure Microsoft Outlook® for use with the Hosted Exchange service. The Outlook Configuration Tool is run through the Microsoft Internet Explorer browser. To configure Outlook, a user can login to a web page with their Hosted Exchange account credentials and follow the on-screen instructions.

**Note:** The instructions described in this user handbook demonstrate the OCT using Windows XP SP2 and Internet Explorer version 6.0. When using other Operating Systems and Web Browsers some screens may appear differently.

# System Requirements

## ***Software Requirements:***

The following software is required to run the Outlook Configuration Tool.

### ⇒ **Email Client Software:**

- Outlook 2007
- Outlook 2003 or
- Outlook 2002 (known as Outlook XP)

### ⇒ **Operating System:**

- Windows XP or
- Windows 2000

### ⇒ **Web Browser:**

- Internet Explorer (version 5 and above)

Note: Due to Active X requirements, this tool will not work with browsers such as Netscape, Mozilla and Opera.

## ***Additional Requirements:***

- ⇒ The user will need to be an administrator on their local PC.
- ⇒ The user will need to download an Active X control during the configuration process.

# Step-by-Step Instructions

## ***Login Process:***

To configure Outlook, type or paste the URL provided by your Administrator into the address field of your browser.

Note: Please close Outlook before starting the Outlook Configuration Tool.

**Step 1:** On the Login page, type the user name in the User Name field.

**Step 2:** Type the user password in the Password field.

Figure: 1 Login Screen of OCT

|  |  |
|--|--|
| <p><b>What is the Outlook Configuration Tool?</b></p> <p>The Outlook Configuration Tool (OCT) is a web-based wizard that will walk you through the automatic configuration of Outlook so that you can use it with your Hosted Exchange service.</p> <p>OCT uses ActiveX® and must be used with Microsoft Internet Explorer 4.0® or above. It will not work with any other browser.</p> <p><b>OCT Usage Requirements</b></p> <p>Outlook:</p> <ul style="list-style-type: none"><li>• Outlook 2007</li><li>• Outlook 2003</li><li>• Outlook 2002 (a.k.a, Outlook XP)</li></ul> <p>Operating Systems:</p> <ul style="list-style-type: none"><li>• Windows® XP, 2000</li></ul> | <p><b>Login to OCT</b></p> <p>Enter your Outlook User Name and Password to login and configure Outlook.</p> <p><b>User Name</b> <input type="text"/></p> <p><b>Password</b> <input type="password"/> <input type="button" value="Go"/></p> |
|  | <p><b>Need Help?</b></p> <p>If you require Technical Support, please contact your e-mail administrator.</p>  |

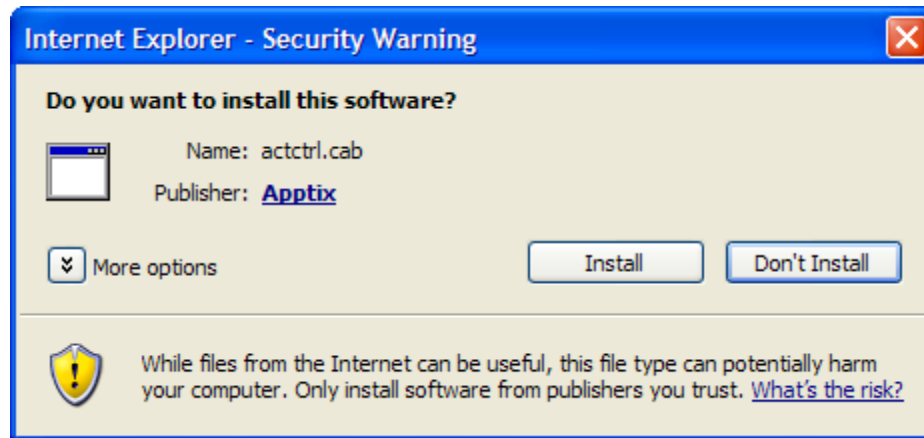
Copyright © Aptix 2006. All other trademarks and logos are property of their respective owners.

Outlook Configuration Tool, Version 2.3

**Step 3:** Click the **Go** button to log in to the Outlook Configuration Tool.

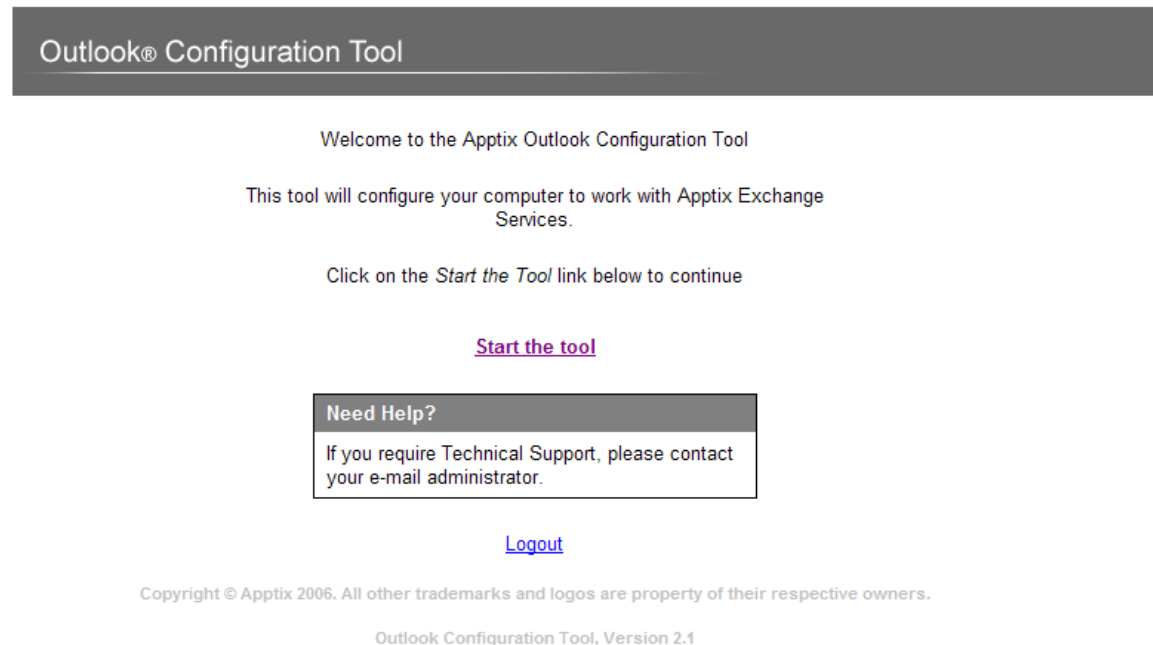
**Step 4:** Click **Install** to install the ActiveX control. This control is required to run the Outlook Configuration Tool.

Figure: 2 Security warning screen



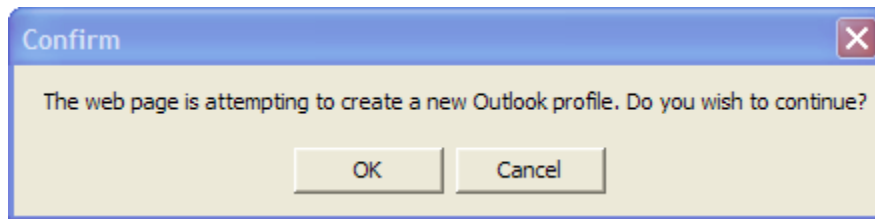
**Step 5:** Click the **Start the Tool** link.

Figure: 3 Start page of OCT



**Step 6:** Click the **OK** button in the Confirm dialog box to initiate the Outlook configuration process.

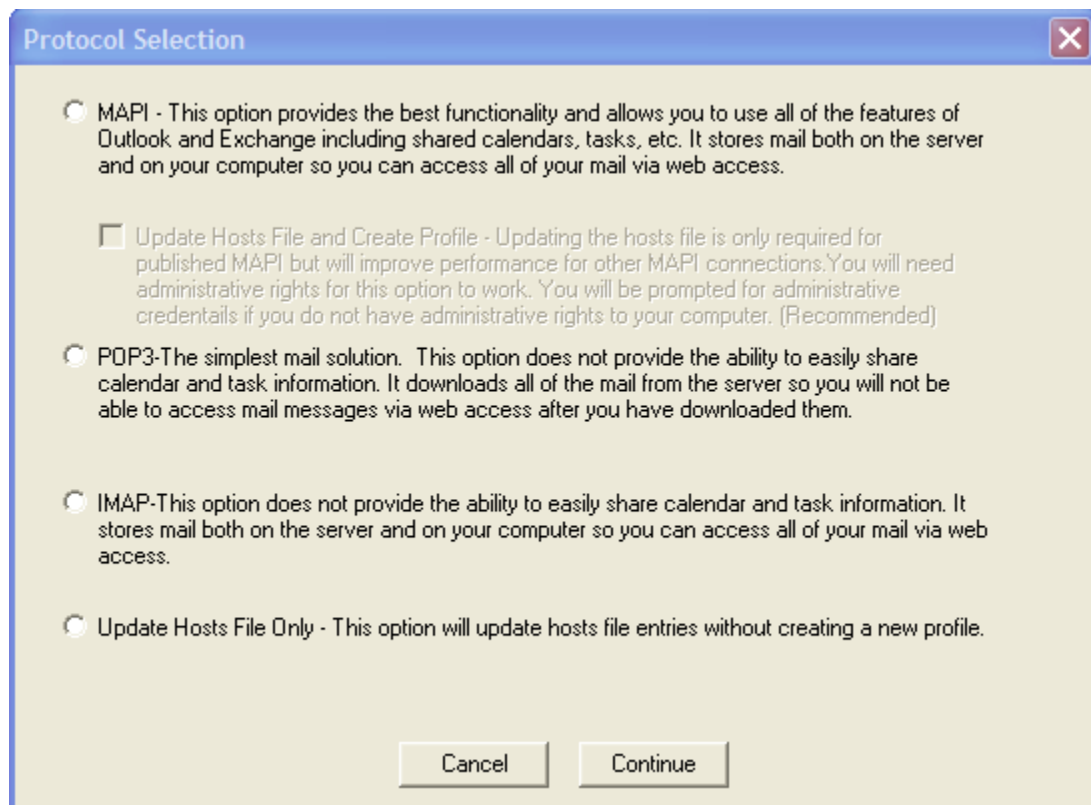
Figure: 4 Dialog Box - Confirming change of outlook profile



### **Selecting a Protocol:**

A pop-up screen now appears with three choices for configuring Outlook: MAPI, POP3, and IMAP and a fourth option for updating your hosts file only. The available options are determined by your Hosted Exchange user account. Options not available for your type of Hosted Exchange account will be grayed out. A description is provided for each option.

Figure: 1 Protocol Selection



## ***MAPI Protocol:***

Note: As mentioned previously, some options may be unavailable based on your Hosted Exchange user account.

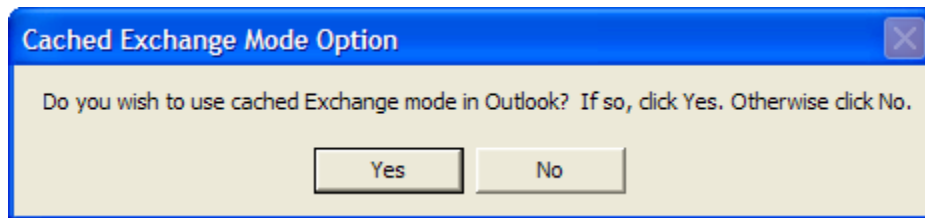
**Step 1:** Select the MAPI option from the Protocol Selection screen and click the **Continue** button. You will also have the option of updating your hosts file when the profile is created by checking the *Update Host File and Create Profile* option.

Note: Selecting the *Update Host File and Create Profile option* is recommended to improve performance.

**Step 2:** A screen will display asking if you wish to use cached Exchange mode in Outlook. If you prefer to keep a copy of email messages stored on your computer, (for use offline) click the **Yes** button. If you do not wish to use cached Exchange mode and you wish to access your email directly on the Exchange server, click **No**.

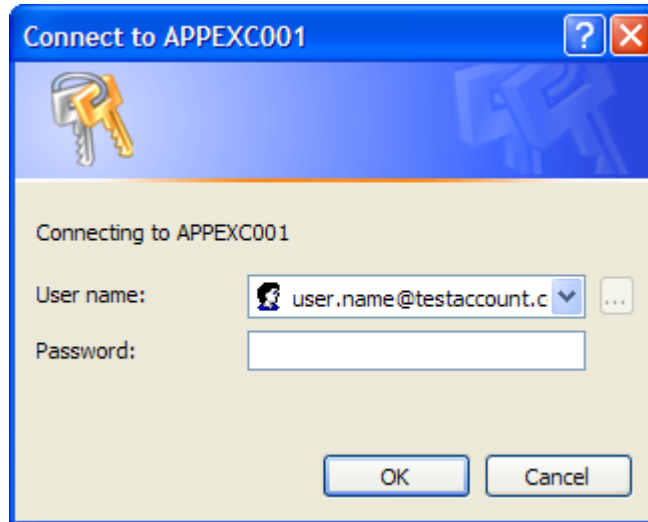
Note: Cached Exchange mode is recommended to improve performance.

Figure: 1 Dialog sheet - Cached Exchange



**Step 3:** Clicking either button in the Cached Exchange dialog box displays the Connection to MAPI screen.

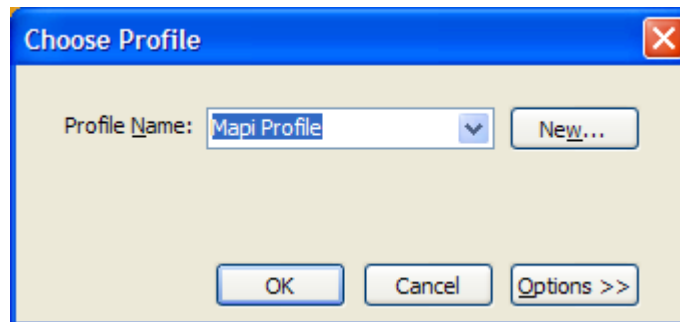
Figure: 2 Screen – Connection to MAPI



**Step 4:** Type your user name and password; these are the same credentials you used to login to the Outlook Configuration Tool. Click the OK button.

**Step 5:** Outlook will prompt you to select a profile; by default, the name of the newly created profile is MAPI Profile. Click the **OK** button.

Figure: 3 Screen – MAPI Profile

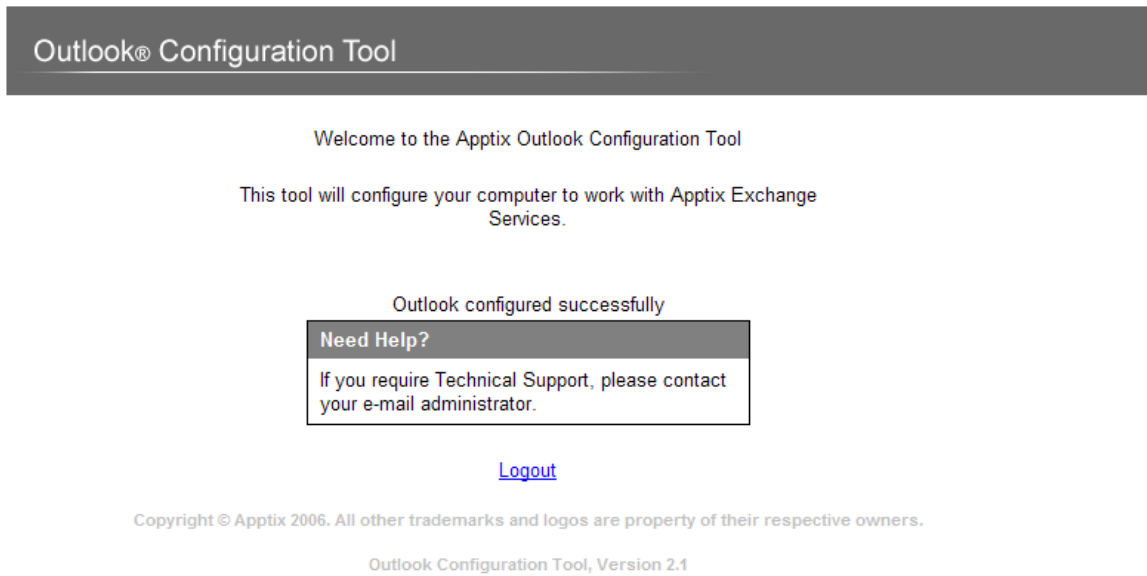


**Step 6:** You will be prompted to log onto the system once again, using the same credentials as above.

**Step 7:** Enter your user name and password again and click the **OK** button. Outlook now configures your mailbox for first time use. After this process is complete, your Outlook client is now configured for use with the Hosted Exchange service.

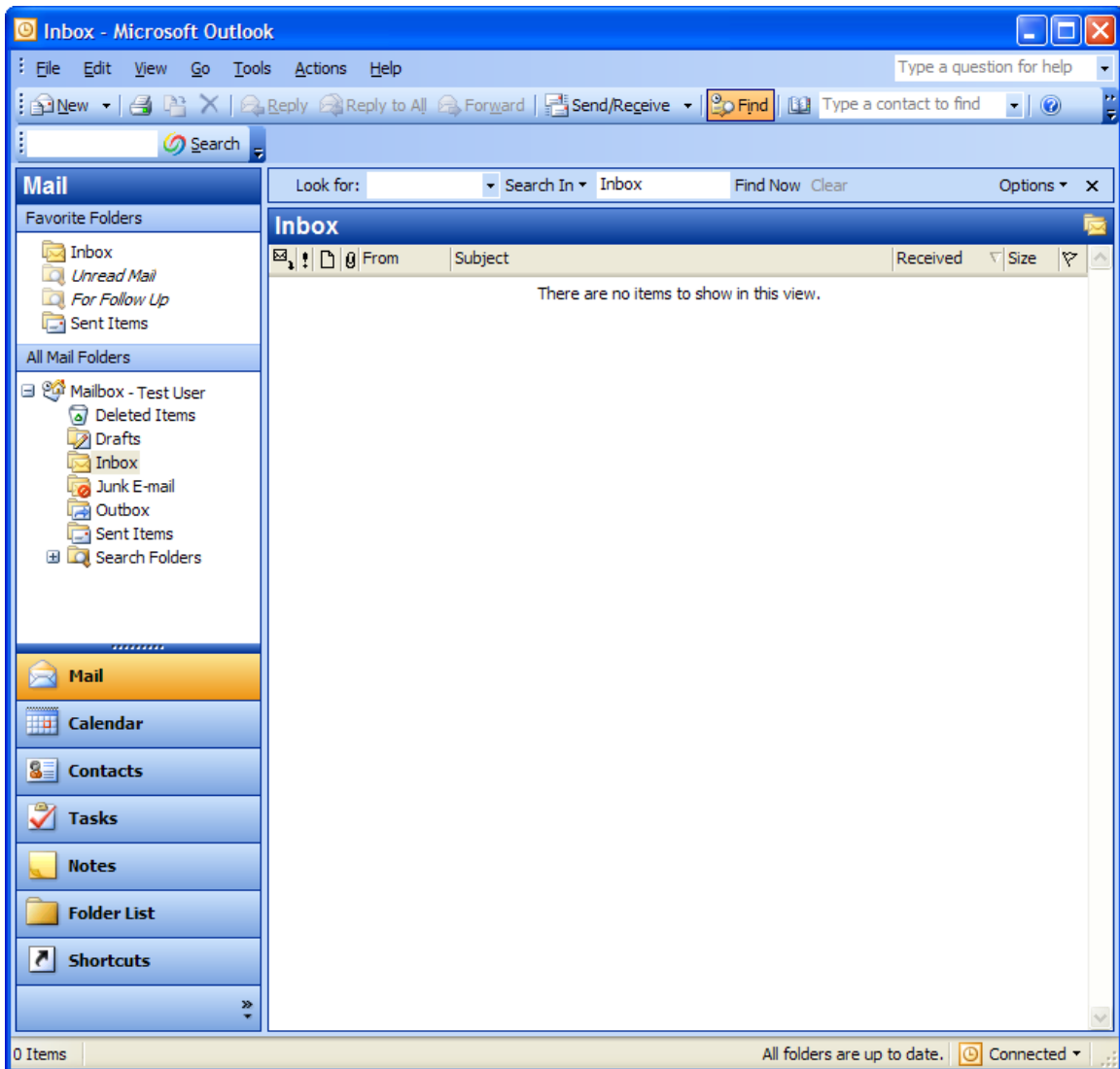
After successful completion of the Outlook configuration process, a message will display to confirm that Outlook configuration has been successfully completed: "Outlook configured successfully". You may now log out from the Outlook Configuration Tool by clicking the **Logout Link**. Alternatively, if Outlook has not been successfully configured, you will receive the message "Configuration Unsuccessful".

**Figure: 4 Outlook Configuration Tool – Message displaying Successful Configuration**



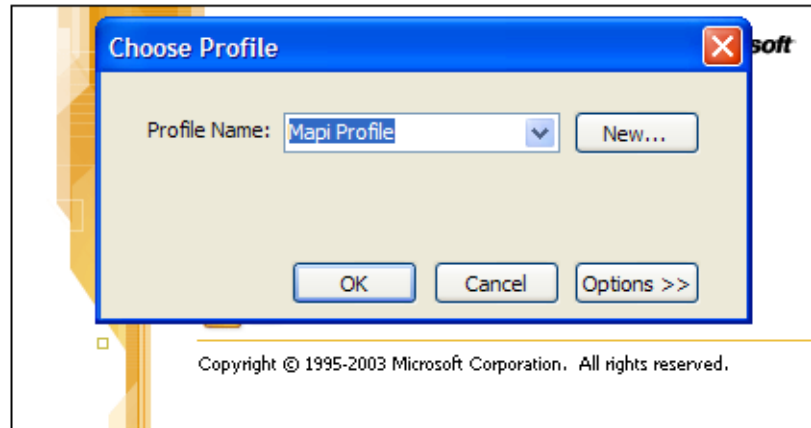
Once the configuration is successfully completed, your Outlook inbox will appear as below:

Figure: 5 Outlook Inbox



The next time you login to Outlook, you will be prompted to select which profile you want to use. The new profile created above will be named *Mapi Profile*.

Figure: 6 Outlook Login



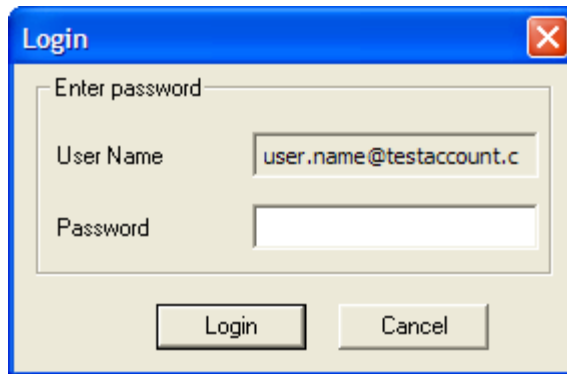
### ***POP3 and IMAP Protocol:***

Note: The process to select and configure both the POP3 and IMAP protocols is the same. As mentioned previously, some options may be unavailable based on your Hosted Exchange user account.

**Step 1:** Select the POP3 or IMAP option from the Protocol Selection screen and click the Continue button.

**Step 2:** The User Name is auto-populated and is derived from the account credentials you used to log in to the Outlook Configuration Tool. Type your password and click the **Login** button.

Figure: 1 Protocol Selection - POP3 or IMAP



**Step 3:** Outlook will prompt you to select a profile; by default, the name of the newly created profile is listed. Click the **OK** button.

Figure: 2 Profile - IMAP profile

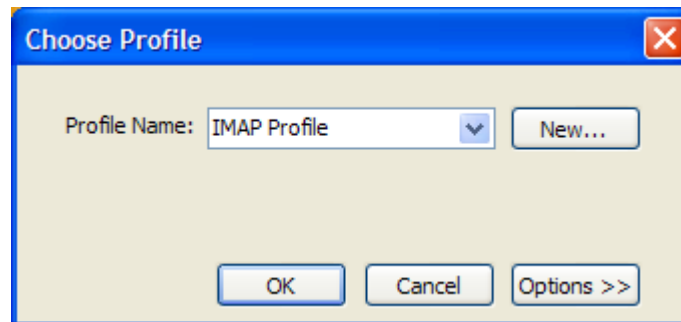
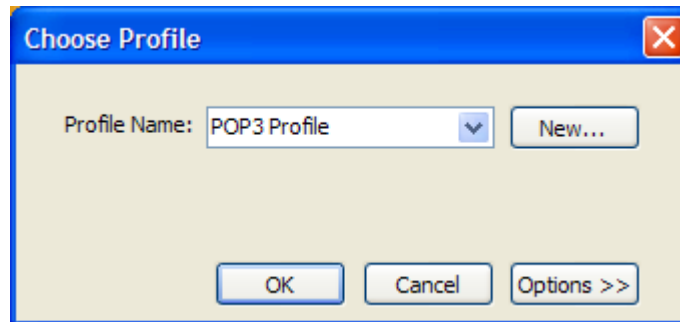
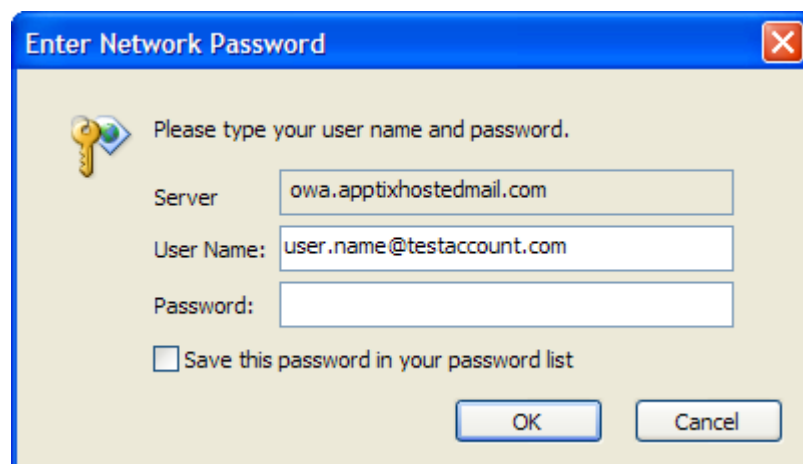


Figure: 3 Profile - POP3 profile



**Step 4:** The Outlook Configuration tool will launch Outlook and prompt you to type your password again. Select the **Save this password in your Password list** check box to save the password in your password list.

Figure: 4 Network Password - POP3 or IMAP



**Step 5:** Click the **OK** button to proceed.

After successful completion of the Outlook configuration process, a message will display to confirm that Outlook configuration has been successfully completed: "Outlook configured successfully". You may now log out from the Outlook Configuration Tool by clicking the **Logout Link**.

**Figure: 5 Outlook Configuration Tool – Message displaying Successful Configuration**

## Outlook® Configuration Tool

Welcome to the Aptix Outlook Configuration Tool

This tool will configure your computer to work with Aptix Exchange Services.

Outlook configured successfully

### Need Help?

If you require Technical Support, please contact your e-mail administrator.

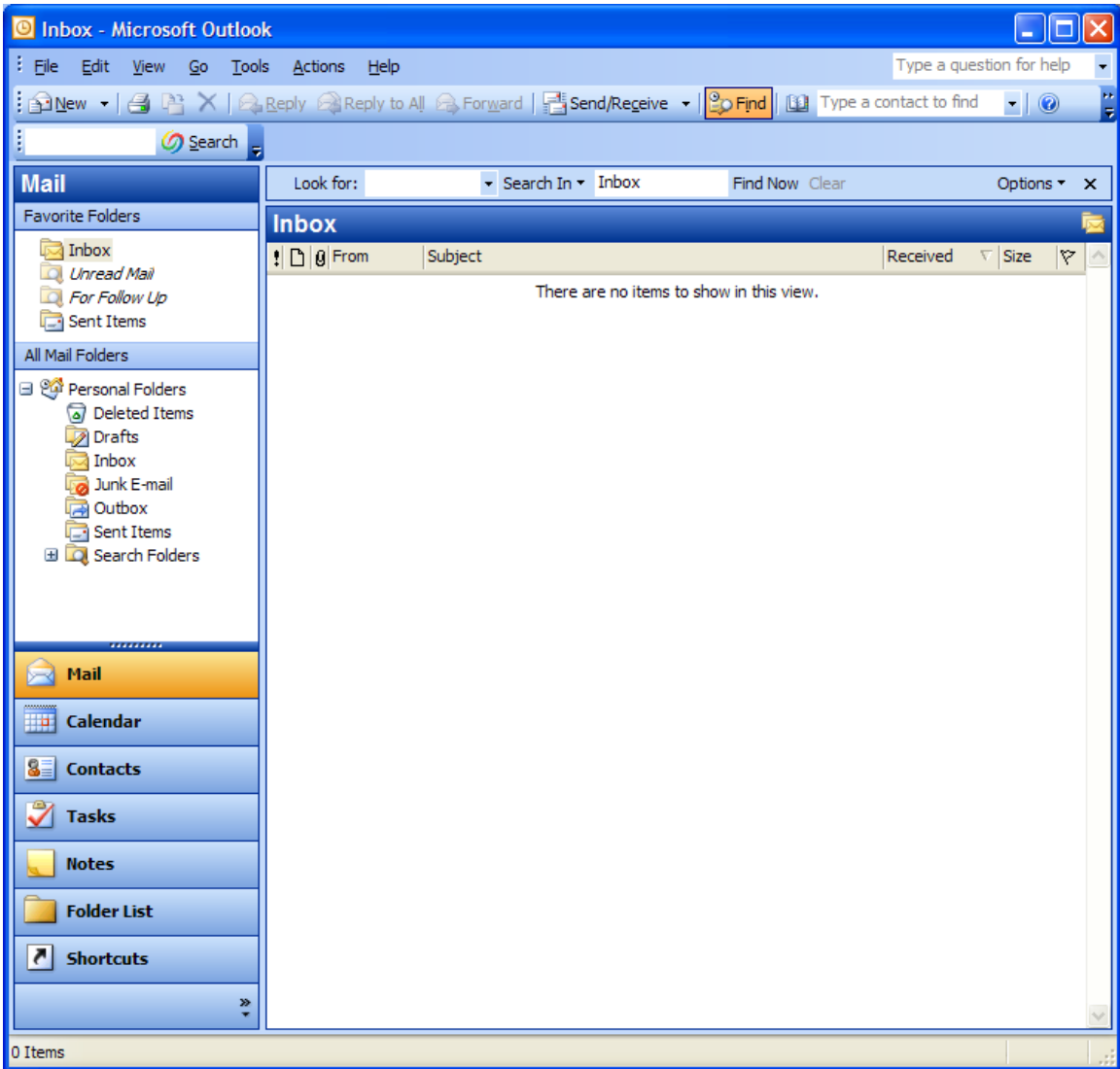
[Logout](#)

Copyright © Aptix 2006. All other trademarks and logos are property of their respective owners.

Outlook Configuration Tool, Version 2.1

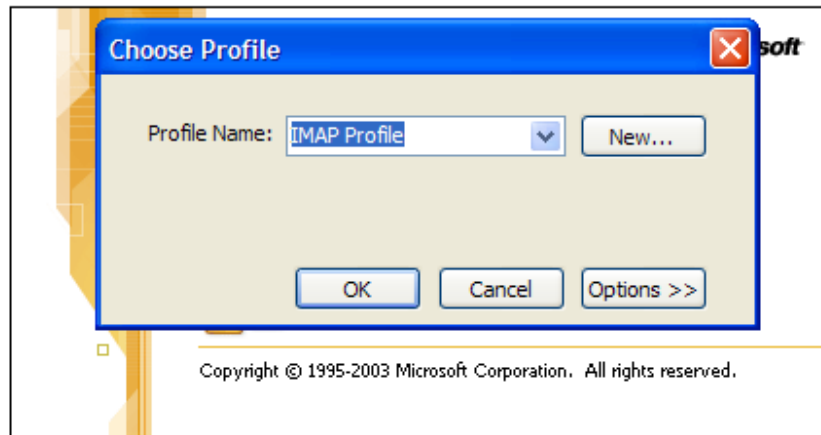
After configuration is complete, your Outlook inbox will appear as below:

Figure: 6 Outlook Inbox



The next time you login to Outlook, you will be prompted to select which profile you want to use. The new profile created above will be named *POP3 Profile* or *IMAP Profile* depending on which protocol you chose.

**Figure: 7 Outlook Login**



### ***Update Hosts File Only:***

Step 1: Select the Updated Hosts File Only option and click the **Continue** button.

After successful completion of the Outlook configuration process, a message will display to confirm that Outlook configuration has been successfully completed: "Outlook configured successfully". You may now log out from the Outlook Configuration Tool by clicking the **Logout Link**.

**Figure: 1 Outlook Configuration Tool – Message displaying Successful Configuration**

## Outlook® Configuration Tool

Welcome to the Aptix Outlook Configuration Tool

This tool will configure your computer to work with Aptix Exchange Services.

Outlook configured successfully

### Need Help?

If you require Technical Support, please contact your e-mail administrator.

[Logout](#)

Copyright © Aptix 2006. All other trademarks and logos are property of their respective owners.

Outlook Configuration Tool, Version 2.1