

Configuring Outlook for Windows to use your Exchange email

McGill faculty, staff and students are given a Microsoft® Exchange® account which will give you an email box, calendaring features, access to McGill Public Folders, the ability to share your mail and calendar items with others, and much more.

Your Exchange mailbox entitles you to an Outlook license. Staff can contact their LAN administrator to obtain the Outlook client. Students can obtain the client on CD by bringing a blank CD to Burnside Hall, Room 112.

To take advantage of the full features of Exchange, you can either:

• Access your Exchange account through the Web using Outlook Web Access (OWA), as described at www.mcgill.ca/ics/tools/email/exchange/#WEB. In this case, no configuration instructions are needed.

OR

- Configure the Outlook client on your computer running Windows OS. In this case, use the instructions in this document for:
 - 1. Configuring your Windows Operating System for <u>Windows Vista</u>, <u>Windows 2000 and Windows</u> <u>XP</u>, or <u>Windows 98 and Windows ME</u>.
 - 2. Setting up your <u>Outlook 2007</u> or <u>Outlook 2003</u> client to receive your McGill email.
 - 3. Using Outlook remotely (from outside McGill (without VPN), (Outlook 2007 and Outlook 2003).

Before you begin

- You will need your McGill Username (i.e. your firstname.lastname@mcgill.ca [for staff] or firstname.lastname@mail.mcgill.ca [for student, affiliate]), your McGill Password, and your DAS username. To verify any of the information outlined above and to create or change your McGill Password, go to the <u>Minerva</u> Personal Menu.
- If you do not have a McGill LAN connection, or intend to use McGill Wireless or DAS to connect to the Internet, then you must set up the VPN (<u>http://www.mcgill.ca/ics/tools/vpn</u>) set up the Outlook Client to access your McGill email.
- Students who wish to use their Outlook client must also first publish their McGill Email Address in the Student Directory on <u>Minerva</u> > Student Menu > Student Directory. This automatically inserts your name into the Global Address List for Outlook, a prerequisite for your Outlook setup. If you wish, you can later unpublish your email from the Student Directory. Please Note: This is not a necessary step for Faculty and Staff as they are automatically added to the Global Address List.

Need more help?

Visit the ICS Web page at <u>http://www.mcgill.ca/ics/tools/email/exchange</u> for more information about email. If you need additional help, please contact your LAN Administrator or contact us online through our Virtual Help Desk at <u>http://www.mcgill.ca/ics/vhd</u>.



Step 1: Configuring your Windows OS

Configuring Windows Vista

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1 Open the Start Menu, and right-click on Network.

| Windows Photo Gallery | Search | |
|-----------------------------------|------------------|--|
| Windows Media Flayer | Computer | and all |
| 😂 Windows Live Messenger Download | Network | Open |
| Cerntasia Studio | Connect To | Explore |
| Notepad | Control Panel | Map Network Drive Disconnect Network Driv |
| | Default Program | Properties |
| All Programs | Help and Support | 10. 18 X C |
| Start Search P | 0 | |

4 A Windows dialog box will prompt you to provide permission to continue. Click on **Continue**. Under the Task pane on the left hand side, select Manage network connections.



- Select Internet Protocol (TCP/IP) and click Properties.
 - Incal Area Connection Properties

 Networking
 Sharing

 Connect using:
 Connect using:

 Image: Intel(R) PRO/1000 PL Network Connection
 Configure...

 This connection uses the following items:
 Configure...

 This connection uses the following items:
 Configure...

 Image: Context Sharing for Microsoft Networks
 Configure....

 Image: Context Sharing for Microsoft Networks

3 Right click on Local Area Connection and select Properties.



6 In the General tab, click Advanced.

| meral | | |
|---|---|--|
| ou can get IPv6 settings assign Otherwise, you need to ask you | ed automatically if your network r network administrator for the a | supports this capability. ppropriate IPv6 settings. |
| Obtain an IPv6 address au | tomatically | |
| Use the following IPv6 add | ress: | |
| IPv6 address: | | |
| Subnet prefix length: | | |
| Default gateway: | | |
| Obtain DNS server address | automatically | |
| O Use the following DNS service | er addresses: | |
| Preferred DNS server: | | |
| Alternate DNS server: | | |
| | | Advanced |



7 In the DNS tab, select Append these DNS suffixes (in order) and click Add.

| DNS server addresses in order of user | |
|--|---------|
| | |
| Add Edit Re | move |
| The following three settings are applied to all connections enabled. For resolution of unqualified names: | with TC |
| Append primary and connection specific DNS suffixes | |
| Append parent suffixes of the primary DNS suffix | |
| ET | |
| Append these DNS suffixes (in order): | |
| Append these DNS suffixes (in order): Add Edit Re | move |
| Add Add Edit Re DNS suffix for this connection: | move |
| Append these DNS suffixes (in order): Add Edit Re DNS suffix for this connection: Resister this connection: | move |

8 Type campus.mcgill.ca and click on Add, then OK.

| IP Settings | DNS r addresse | s, in order (| ofuse: | | | |
|--|--|---|---|----------------------------|--------------------------|------------------|
| | | -, | | | | |
| | | Add | Edit | t | Re | move |
| The follow enabled, I | ing three s | ettings are | applied to lified nam | all conne | ctions | with TCP/IP |
| | | | | | | |
| Appen | d primary a | nd connect | ion specifi | DNS su | ffixes | |
|) Appen | d primary a pend parer | nd connect it suffixes o | on specifie | DNS su t ary DNS | f fixes suffix | |
| Appen Appen Appen | d primary a pend parer d these DN | nd connect It suffixes o S suffixes (| on specifie of the prim in order): | ary DNS sut | ffixes suffix | |
| Appen Appen Appen TCP/IP | d primary a pend parer d these DN Domain S | nd connect at suffixes o S suffixes (uffix | on specifie of the prim in order): | ary DNS sut | ffixes suffix | ? <mark>×</mark> |
| Appen Appen Appen TCP/IP Domai | d primary a pend parer d these DN Domain S n suffix: | nd connect at suffixes o S suffixes (uffix | ion specifie of the prim in order): | ary DNS sut | ffixes suffix | ? <mark>×</mark> |
| Appen Appen Appen Appen TCP/IP Domai camp | d primary a pend parer d these DN Domain S n suffix: us.mcgill.c | nd connect at suffixes o S suffixes (uffix | ion specifi of the prim in order): | ary DNS sut | ffixes suffix | 8 × |
| Appen Ap Appen TCP/IP Domain Campion | d primary a pend parer d these DN Domain S n suffix: nus.mcgill.c | nd connect at suffixes o S suffixes (uffix | ion specific of the prim in order): | ary DNS | ffixes suffix | ? x |
| Appen Ap Appen Appen TCP/IP Domai camp | d primary a pend parer d these DN Domain S n suffix: nus.mcgill.c | nd connect at suffixes of S suffixes (uffix | ion specific if the prim in order): | ary DNS sut | ffixes suffix | Cancel |
| Appen ✓ Ap ● Appen TCP/IP Domai Camp | d primary a pend parer d these DN Domain S n suffix: uus.mcgill.c | nd connect at suffixes o S suffixes (uffix | ion specific in order): | ary DNS sut | ffixes suffix | Cancel |

Congratulations!

You are now ready to configure Outlook 2007!





Configuring Windows 2000 or XP

1 Right-click on My Network Places and select Properties.



2 Right click on Local Area Connection and select Properties.



3 Select Internet Protocol (TCP/IP) and click Properties.



4 In the General tab, click Advanced.

| You can his cap he appr | get IP settings bility. Otherwis opriate IP settin | e, you need to igs. | omatically i b ask your | f your ne network | twork support administrator (|
|-------------------------------|--|------------------------|----------------------------|----------------------|----------------------------------|
| © Db | | | | | |
| 000 | ain an IP addre | ess automatic: | aly | | |
| O Us | the following l | IP address: - | | | |
| IP ad | dress: | | | | - |
| Subn | et mask; | | | +1 | * . |
| Defau | lt gateway. | | | | 1 |
| <u>о</u> ОЬ | tain DNS serve | r address auto | omatically | | |
| OUs | e the following l | DNS server a | ddresses: | | |
| Prefe | red DNS serve | ar. | | | |
| Altern | ate DNS serve | ć. | | | |

In the DNS tab, select Append these DNS suffixes (in order) and click Add.

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| Advanced TCP/IP Settings | ? 🔀 |
|--|--------|
| IP Settings DNS WINS Options | |
| DNS server addresses, in order of use: | |
| | t |
| | 7 |
| Add Edt Remove | |
| The following three settings are applied to all connections with TCP/ enabled. For resolution of unqualified names: | IP |
| Append primary and connection specific DNS suffixes | |
| Append parent suffixes of the primary DNS suffix | |
| Append these UNS surrives (in order) | |
| | t |
| | 2 |
| Add Edit Remove | |
| DNS suffix for this connection: | |
| Register this connection's addresses in DNS Use this connection's DNS suffix in DNS registration | |
| * IST Custoner Support = 2003 | Cancel |

Type campus.mcgill.ca and click on Add, then OK.

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| CP/IP Domain Suffix | ? 🛽 |
|----------------------|------------|
| Domain suffix: | |
| campus.mcgill.ca | |
| © IST Customer Suppo | tel Cancel |



Configuring Windows 98 or ME

- 1 Right click on Network Neighbourhood and select Properties.
 - <u>O</u>pen \underline{E} xplore Find Computer.. NetWare Login. Net<u>W</u>are Connections... Rec N Novell Map Network Drive. Novell Capture Printer Port... N m Novell End Capture... Map <u>N</u>etwork Drive... Interr Disconnect Network Drive.. Create Shortcut Rename My Bri Properties
- 2 Select the TCP/IP of your Network Card and click Properties.



3 In the DNS Configuration tab, select Enable DNS and add campus.mcgill.ca to the Domain Suffix Search Order.

| Bindings | Adv | anced | Ne | BIOS |
|-------------------|-------------|----------|-----------|------------|
| DNS Configuration | Gateway | WINS Con | iguration | IP Address |
| C Disable DNS | | | | |
| Enable DNS | | | | |
| - | | | | |
| Host Jacques | 2 | Dgmain: | | |
| DNS Sature Sea | rch Dider - | | | |
| DNS Server Sea | ach biber - | _ | | 1 |
| | | | Add |] |
| | | 8 | | 1 |
| | | | | 1 |
| | | | | |
| Domain Suffix S | earch Order | _ | | |
| campus.mcg | il.ca | | Adf | |
| | | a | emove | 1 |
| | | | | 1 |
| | | | | |
| L | | | | |
| | | 10000 | | |



Step 2: Setting up your Outlook Client

Setting up Outlook 2007

Method A: Using the Setup Wizard (the wizard loads the first time you open Outlook 2007)

*Reminder: you must log into to VPN first if off-campus. Setup instructions are available at: <u>http://www.mcgill.ca/ics/tools/vpn</u>.

1 When you start Outlook for the first time. You will be prompted to configure Outlook. Click on **Next** to proceed.



3 Enter your Name (this name will display when you send messages from Outlook), your McGill Email Address, and your McGill Password.



2 When asked to configure an email account, select Yes, and click on **Next**.

| count Configuration | |
|--|-------------------------------|
| E-mail Accounts | |
| You can configure Outlook to connect to Internet E-mail, Mic other E-mail server. Would you like to configure an E-mail acc | rosoft Exchange, or count? |
| ● Yes ● No | |
| | |
| | |
| | |
| | < Back Next > Cancel |

4 Check the box at the bottom of the screen to manually configure your server settings, and click on **Next**.

| Auto Account Set | qu | 7 |
|--------------------|---|---|
| Your Name: | Training20.ICS | |
| | Example: Barbara Sankovic | |
| E-mail Address: | training20.ics@mcgill.ca | |
| | 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 | |



5 When prompted to select an E-mail Service, select **Microsoft Exchange**.



7 Congratulations!

You have now configured Outlook 2007 to receive your McGill email. Click on **Finish** to exit the Wizard.



6 Enter server name: mapi.mcgill.ca (your User Name will default in), and click on Next.

| You can enter the required | gs information to connect to Microsoft Exchange. | × |
|---|---|---------------|
| Type the name of your Microsofi administrator. | t Exchange server. For information, see your system | |
| Microsoft Exchange server: | mapi.mcgil.ca | |
| | Use Cached Exchange Mode | |
| is usually your user name. User Name: | Training ICS | Check Name |
| | | |
| | | More Settings |



Method B: Using Account Settings

*Reminder: you must log into to VPN first if off-campus. Setup instructions are available at: <u>http://www.mcgill.ca/ics/tools/vpn</u>.

1 Open the **Control Panel** from the Start menu



3 Open Email Account Settings using the Tools menu (Tools> Email Accounts).



5 Enter your Name (this name will display when you send messages from Outlook), your McGill Email Address, and your McGill Password.

| Add New E-mail Ac | count | X |
|--|---|-------|
| Auto Account Setu Clicking Next will Exchange server | IP contact your e-mail server and configure your Internet service provider or Microsoft account settings. | × |
| Your Name: | Training20 ICS | |
| | Example: Barbara Sankovic | |
| E-mail Address: | training20.ics@mcgill.ca | |
| | 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 > C | ancel |
| | | |

2 Select the Mail icon



4 In the Email Tab, click on New.

| mail Data Elles DSS Ees | da SharaDaiat Lista Internat Calendara | Dublished Calendara Address Realis |
|-------------------------|--|------------------------------------|
| | | Published Calendars Address books |
| g New XRepair | Change 💟 Set as Default 🗙 F | Remove 🕈 🖶 |
| Name | Туре | |
| | | |
| | | |
| | | |

6 Check the box at the bottom of the screen to manually configure your server settings, and click on **Next**.

| Auto Account Set | up | ž |
|--------------------|---|---|
| | | |
| tour name: | Franng20 ICS | |
| | Example: barbara barikuvic | |
| E-mail Address: | training20.ics@mcgill.ca | |
| | 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 | |
| | | |



7 When prompted to select an E-mail Service, select **Microsoft Exchange**.



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| Mail D | elivery Location |
|--------|--|
| | By adding a Microsoft Exchange account you have changed where some of your new e-mail messages and calendar information is saved. |
| | These changes will take effect the next time you start Outlook. |
| | Show Help >> |
| | OK |

8 Enter server name: mapi.mcgill.ca (your User Name will default in), and click on Next.

| You can enter the requ | <pre>ings red information to connect to Microsoft Exchange.</pre> | | |
|---|---|------|----------|
| Type the name of your Micro administrator. | soft Exchange server. For information, see your system | | |
| Microsoft Exchange serv | er: mapi.mcgill.ca | | |
| | ✓ Use Cached Exchange Mode | | |
| | | | |
| | | More | Settings |
| | | | |

10 Congratulations!

You have now configured Outlook 2007 to receive your McGill email.

| Account Settings | | | |
|---|----------------------|-------------------------|---------------|
| E-mail Accounts You can add or remove an account. You can select an account and change its settings. | | | |
| E-mail Data Files RSS Feeds SharePoint Lists | s Internet Calendars | Published Calendars | Address Books |
| i New 🕅 Repair 😭 Change 📀 | Set as Default 🗙 R | emove 🕈 🖶 | |
| Name | Type | | |
| Microsoft Exchange | Exchange (s | end from this account l | ov default) |
| Selected e-mail account delivers new e-mail messages to the following location: Mailbox - Training20 ICS\Inbox | | | |
| | | | |



Setting up Outlook 2003

*Reminder: you must log into to VPN first if off-campus. Setup instructions are available at: <u>http://www.mcgill.ca/ics/tools/vpn</u>.

1 From My Computer, click on Control Panel and select Mail.



3 Choose Add a new e-mail account, click Next.



2 Click on E-mail accounts if available. If not, you will be prompted to create a profile.

Click Add.



4 Select Microsoft Exchange Server, click Next.

| Server Type You can choose the type of server your new e-mail | acount will work with. | × |
|---|-------------------------------------|-----|
| Microsoft Exchange Server Connect to an Exchange server to read e- documents. OP0P3 | mail, access public folders, and sh | we |
| Connect to a POP3 e-mail server to downli | oad your e-mail. | |
| ○ IMAP | | |
| Connect to an IMAP e-mail server to down folders. | load e-mail and synchronize mailbo | x |
| OHTTP | | |
| Connect to an HITTP e-mail server such as synchronize mailbox folders. | Hotmail to download e-mail and | |
| Additional Server Types | | |
| Connect to another workgroup or 3rd-part | ty mail server. | |
| | | |
| | | |
| | | |
| | | |
| | 2 | 100 |



 Fill in the fields:
 Microsoft Exchange Server – `mapi.mcgill.ca'
 User Name – your name and click Check Name.



Outlook will attempt to find your email address in the Global Address List (GAL).

Note: Students must have first published their McGill Email Address in the **Student Directory**.

6 Fill in the appropriate information, depending on which window is displayed:

User Name – McGill Username Password – McGill Password

| 0 - | |
|----------------------|-----------|
| Connecting to mapi.n | ncgill.ca |
| Password: | •••••• |

OR

User Name – DAS username Password – McGill Password Domain Name – campus

| Jser Name: | jpaill |
|----------------|-----------------|
| Password: | **** |
| Domain Name: 😡 | campus |
| OK Cancel | Change Password |

7 Click Next and click Yes at the warning message. Click Finish.



8 Click on E-Mail Accounts again.





9 Choose View or change existing e-mail account and click Next.



11 Click **OK** at the warning message and close the Mail Setup window.

| Account | : Manager |
|---------|---|
| 1 | You have changed the default delivery location for your e-mail. This will change the location of your Inbox, Calendar, and other folders. These changes will take effect the next time you start Outlook. |
| | IST Customer Support - 2003 |

10 Under Deliver new e-mail to the following location, choose Mailbox – <Your Name> and click Finish.

| outlook processes e-mail for the | se accounts in the following order: | | |
|----------------------------------|-------------------------------------|---|----------------|
| Name | Туре | | Change |
| Microsoft Exchange Server | Exchange (Default) | | Add |
| | | | Remove |
| | | | Set as Default |
| | | | Move Up |
| ٢ | | > | Move Down |
| | | | |
| <u>(</u> | | > | Move Down |



Using Outlook from Outside McGill (without VPN)

You can access the Outlook from outside McGill without having to always make a VPN connection.

Follow the steps below to change your existing configuration.

Changing an Existing Configuration – Outlook 2007

| Connect to VPN and start Outlook 2007. Select Tools > Account Settings. In the Email Tab, select Microsoft Exchange Server and click Change. In the Microsoft Exchange Settings window, click on More Settings. Select the Connection tab. Choose Connect to my Exchange mailbox using HTTP. Click on Exchange Proxy Settings. | 8. In the next dialog box, type 'exchange.mcgill.ca' in the Use this URL to connect Field. 9. Put a checkmark in all boxes EXCEPT the Only Connect to proxy server for Exchange. |
|--|---|
| Microsoft Exchange General Advanced Security Connection Use these settings when connecting to Microsoft Exchange when working offline: Image: Connect using my Local Area Network (LAN) © Connect using my Local Area Network (LAN) © Connect using my phone line Image: Connect using my phone line © Connect using Internet Explorer's or a 3rd party dialer Modem Use the following Dial-Up Networking connection: Image: Connect to Microsoft Exchange using HTTP Outdook Anywhere Image: Connect to Microsoft Exchange using HTTP Exchange Proxy Settings OK Cancel Apply | Microsoft Exchange Proxy Settings Microsoft Office Outlook can communicate with Microsoft Exchange over the Internet by nesting Remote Procedure Calls (RPC) within HTTP packets. Select the protocol and the identity verification method that you want to use. If you don't know which options to select, contact your Exchange Administrator. Connection settings Use this URL to connect to my proxy server for Exchange: https:// exchange.mcgill.ca @ Connect using SSL only @ Only connect to proxy servers that have this principal name in their certificate: @ Only connect to proxy servers that have this principal name in their certificate: @ On fast networks, connect using HTTP first, then connect using TCP/IP @ On slow networks, connect using HTTP first, then connect using TCP/IP Proxy authentication settings Use this authentication when connecting to my proxy server for Exchange: MTLM Authentication @ OK Cancel 10. Click OK twice, click Next, then Finish. |
| Congratulations! The next time you start Outlook 2007, there is no r via HTTP. | need to connect to VPN, since Outlook will connect |



Changing an Existing Configuration – Outlook 2003

| Connect to VPN and start Outlook 2003. Select Tools > E-mail Accounts. Select View or change existing e-mail accounts and click Next. Select Microsoft Exchange Server and click Change. Click on More Settings. In the Microsoft Exchange Server dialog box, select the Connection tab. Check Connect to my Exchange mailbox using HTTP, and click on Exchange Proxy Settings. | In the next dialog box, type 'exchange.mcgill.ca' in the Use this URL to connect field. Put a checkmark in all boxes EXCEPT the Mutually authenticate the session when connecting with SSL. |
|--|---|
| Microsoft Exchange Server X General Advanced Security Connection Use these settings when connecting to my Exchange server when working offline: Connect using my Local Area Network (LAN) © Connect using my Local Area Network (LAN) Connect using my phone line © Connect using Internet Explorer's or a 3rd party dialer Modem Use the following Dial-Up Networking connection: Properties Add Exchange over the Internet Connect to my Exchange mailbox using HTTP Exchange Proxy Settings X @ ICS Customer Support 2005 | Exchange Proxy Settings X Microsoft Office Outlook can communicate with Microsoft Exchange Server over the Internet by nesting Remote Procedure Calls (RPC) within HTTP packets. Select the protocol and the identity verification method that you want to use. If you don't know which options to select, contact your Exchange Server Administrator. Connection settings Use this URL to connect to my proxy server for Exchange: https:// exchange.mcgill.ca Image: Connect using SSL only Mutually authenticate the session when connecting with SSL Principal name for proxy server: Principal name for proxy server: Image: On fast networks, connect using HTTP first, then connect using TCP/IP Image: No slow networks, connect using HTTP first, then connect using TCP/IP Proxy authentication settings Use this authentication when connecting to my proxy server for Exchange: Image: NTLM Authentication Image: Other Connect Support OK Cancel |
| | 10. Click OK twice, click Next , then Finish . |
| Congratulations! The next time you start Outlook 2003, there is no r via HTTP. | need to connect to VPN, since Outlook will connect |

