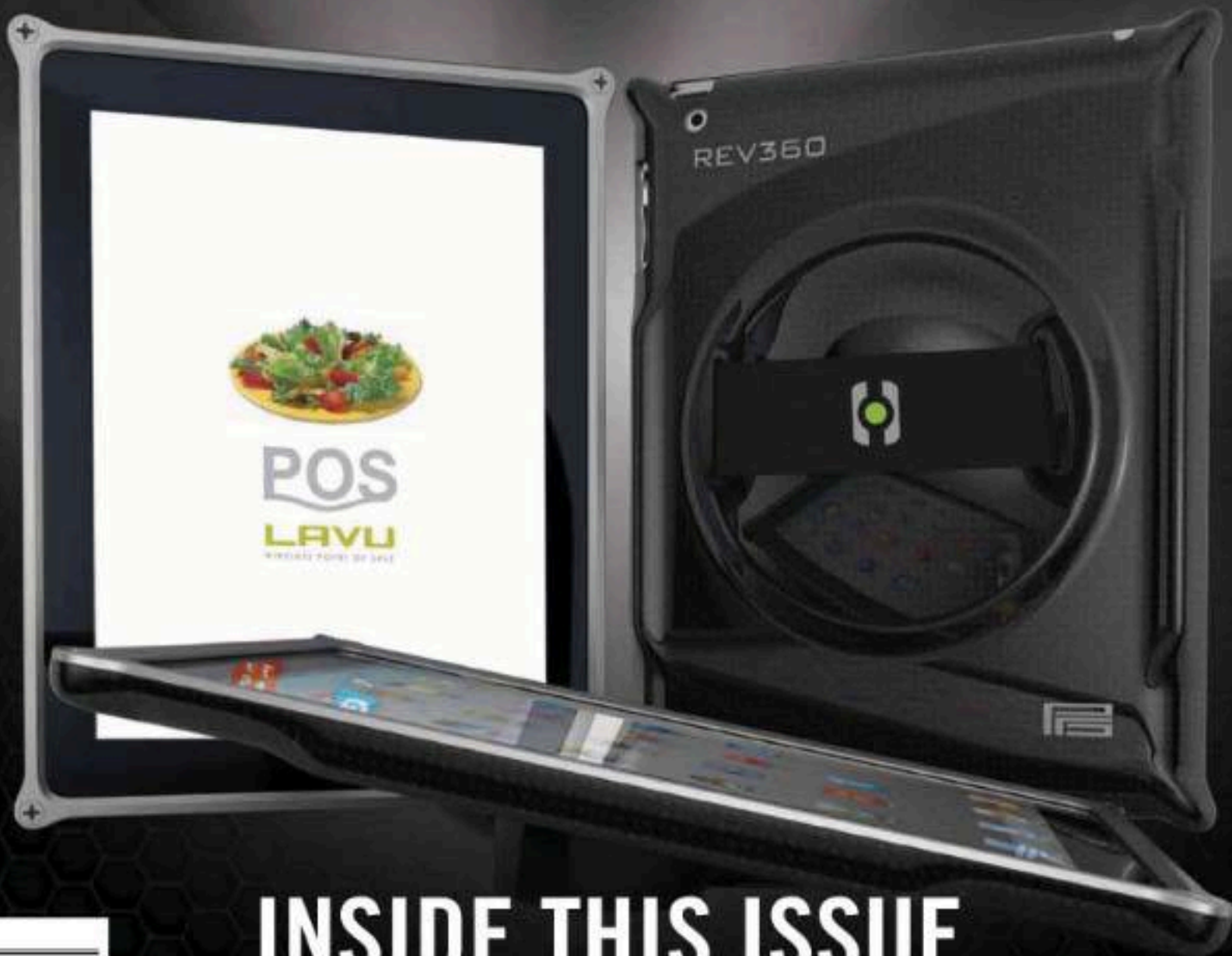




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ISSUE 6



EXCHANGE AND THE MAC, PART 2: CLIENT SETUP

In part one of this two-part series, we discussed some of the advantages of using Microsoft Exchange server as the synchronized mail, calendar, and contacts solution for users of Mac OS X. In this installment, we'll go over how to configure Mac OS X and iOS devices for use with Exchange server.

Mac OS X

There are several options for connecting to an Exchange server with Mac OS X. Last time, we printed a chart to show what is compatible with what version of Exchange server. These are in order of recommendation.

See "Figure 1" on page 27 for chart

Outlook 2011 is the most current Microsoft product, and works with Exchange Server 2007 (Rollup 4 or later) or 2010. If you are using these newer versions of Exchange Server with Entourage 2008 (version 12.x), you should first update it to Entourage 2008 Web Services Edition (version 13.x), a free download from <http://www.microsoft.com/mac/downloads>. Alternatively, you could consider upgrading to the newer product Outlook 2011. It is often available from a hosted Exchange provider if you use one, and is otherwise included with Microsoft Office 2011 Business Edition.

You could also use Apple Mail, Address Book, and iCal in Mac OS X 10.6 Snow Leopard or Mac OS X 10.7 Lion, though these applications are not as robust, (though still preferred by some Mac users).

If you have Exchange Server 2003, then your only option for synchronized Calendar and Contacts will be Entourage 2004 (version 11.x) or 2008 (version 12.x). We'll discuss setting this up below.

iOS

Any current version of iOS can connect to Exchange 2003 servers or later. This is because they connect via the Exchange ActiveSync protocol, which is supported on Exchange 2003, rather than Exchange Web Services, which was introduced in 2007.

Exchange Server 2007 (Rollup 4 or later) or 2010

Setting up Outlook, Entourage 2008 Web Services Edition (version 13.x), or Apple Mail/Address Book/iCal, as well as iOS devices, can be a snap if you define an autodiscover record for your domain. So, for example, if your mail domain is <http://mail.superawesomecorp.com>, you could want to define, in your DNS records, autodiscover.awesomecompany.com,

and it should point to the appropriate autodiscover address. If you are using a hosted Exchange provider, they will easily be able to tell you what this is.

If you have your autodiscover records set up this way, then you will be able to use the new account wizards in your chosen application. If not, then you'll need to put in more settings manually.

While Outlook 2011, Entourage 2008 WSE, and Apple Mail/Address Book/iCal all have some differences in their account setup wizards, they have common settings you may be prompted for. These are:

Name: This should be the first and last name of the user, e.g. "Eric Cartman," as is defined for the Exchange mailbox. This also will be the heading under which the account appears in the folder tree.

Email address: The email address of the user.

Username or Account ID: This should also be the email address of the user being set up. In unusual cases (or if you are using Entourage 12.x), you may instead need to use the Windows Server short username.

Domain: Leave this blank if you are using the email address for the account ID; you may need to supply it if you are using the short user name. If you are using a hosted Exchange provider, they can advise you as to what this is.

Password: The user's password.

If Autodiscover is correctly set up, this is usually all that is required to get going for Outlook 2011, Entourage WSE (13.x), Apple Mail/Address Book/iCal, or iOS. But if it isn't, then you may also need to supply a particular URL for the server address. In Entourage 2008 WSE (13.x), this is found under the Advanced tab of the Edit account window, next to "Exchange Server." Typically, this will be: <http://mail.superawesomecorp.com/EWS/Exchange.asmx> — Intermedia and Microsoft BPOS, two popular hosted Exchange services, use this syntax. However, your setup may vary, and in some cases, you may be able to supply only the domain without the rest of the path.

After setting up the account, you may be asked for permission to redirect to the server URL; this is Autodiscover doing its job. Click the checkbox to not be reminded. However, if users are traveling with laptops are on public hotspots which require a web login, they may again see this request, however, it will not be redirecting to the server URL, but instead the public hotspot login page, which of course won't make any sense to Outlook or Entourage. These users should first sign in

using a web browser, and then use Outlook, Entourage, or Apple Mail/Address Book/iCal.

Outlook 2011, Entourage WSE (13.x), Apple Mail/Address Book/iCal, and iOS don't have any difficulty adding multiple Exchange accounts (unlike Outlook for Windows), if you have that need. Entourage WSE (13.x) will only synchronize tasks and notes with the account designated as the default, however.

If you are using Outlook 2011 or Entourage WSE (13.x), any user can also share calendars, contacts, and inbox with specified users by control-clicking on one of those folders, choosing Sharing..., and selecting the users and what kind of access they should have. On the user's computers, they can choose Open Other User's Folder from the File menu to access these shared resources.

If you are using Apple Mail/Address Book/iCal, each application is set up separately, but upon completing setup for one of them, you will see two checkboxes for automatically configuring the other two others. Note that Exchange contacts in Address Book will show up in a separate list from "On My Computer" contacts; also, Exchange categories are not supported in any of the applications.

Exchange Server 2003

If you are using Exchange Server 2003, you might consider upgrading to a new server, or a hosted Exchange provider. With Exchange Server 2003, your options are limited: Entourage 2004 (11.x; will not run on Mac OS X 10.7 Lion), or Entourage 2008 (12.x; Web Services Edition will NOT work, and if you install it, you will need to remove Office 2008 and reinstall it to get 12.x back). You can of course also use any IMAP mail client, but you won't have synchronized calendar or contacts.

These older products have some limitations. They are more difficult to set up accounts for and share resources between users. And, while Entourage 2004 and 2008 (12.x) feature tasks, notes, and categories, these do NOT synchronize with any version of Exchange server. (This is a limitation of the older Web-DAV protocol these products use to connect, which is one of the reason the newer versions use Exchange Web Services instead.)

Continued on page 27.



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Exchange and the Mac, Part 2: Client Setup Story continued from page 8

To set up Entourage 2004 or 2008 (12.x), forget about autodiscover, or the wizard; they just don't work. Go to the manual settings. The fields you'll need are the same as what described above for the newer versions, but you will almost certainly need the short user name and domain. If you are using a hosted Exchange provider, they can provide these for you.

In addition, you will need a different URL for the server than what is presented above. The URL can be entered at the bottom of the main account window, and usually looks like <http://mail.superawesomecorp.com/exchange>. Different servers seem to require different entries, however: you may need to also append a slash followed by your email address, e.g. <http://mail.superawesomecorp.com/exchange/mesmith@superawesomecorp.com>, or you may need only the domain. You won't really know if it's working until you close the window and see whether the "Not Connected" notice next to the account name goes away and the folders appear.

Folder sharing from Entourage 2004 or 2008 (12.x) doesn't work properly. If the folder has been shared from a user using Outlook for Windows or Outlook Web Access using Internet Explorer, it's possible to access these folders, but it may require entering a URL similar to the above.

Long story short: If you've got Exchange 2003, try to figure out a way to upgrade.

Other ways to connect

Exchange 2010 offers great web mail which works in all modern browsers. 2007 and older have mediocre versions for all browsers other than Internet Explorer, but they'll do in a pinch. IMAP clients can also be set up for synchronized mail if this is an appropriate solution.

Troubleshooting tips

Outlook 2011 maintains a database spread across numerous small files. This database may become corrupted, and you may need to rebuild it periodically when prompted or when things aren't working right. You can rebuild it on demand by holding down option as you launch Outlook. From this same alternate launch window, you can create a new profile if you wish; to switch to it, you need to set it as the default profile.

Entourage 2004, 2008 (12.x), and 2008 WSE (13.x) store all their data in a single database file. It is not uncommon for this database file to become large. Time Machine does not reliably back it up, and it winds up eating up space when it is continually recopied, so it should be excluded from Time Machine backups, and regularly backed up by other means (when all Office applications are closed). If it does become corrupt, you can opt to rebuild it, but a better bet may be to create a new profile (from Entourage menu->Switch Profiles) and reload the account from the Exchange server.[]



Ivan Drucker is the founder of IvanExpert, which provides Mac IT support to small businesses in New York City. He worked as an engineer for Apple at its headquarters in Cupertino, California, and has also served as development manager for the website of Sotheby's auction house. He has been using Apple computers since 1978, when he got his first Apple II.

Exchange and Mac Compatibility Chart

	Exchange 2003	Exchange 2007	Exchange 2010
Entourage 2004	x	x	
Entourage 2008	x	x	
Entourage 2008 Web Services Edition			x
Outlook 2011		x	x
Apple iMail/Calendar/Address Book or Snow Leopard iMAM/IM/Outlook		x	x
Outlook Web Access	x	x	x

Figure 1

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