

Outlook 2011 Setup For ITS Exchange 2010 Server Using A SOM Domain Login

WHAT

These instructions are for the setup of Outlook 2011 to connect to the UCSF ITS Exchange 2010 Email Server

WHY

SOM ISU is migrating all SOM email accounts from the Exchange 2003 email server to the UCSF ITS Exchange 2010 email server. Outlook 2011 is the preferred email client for the Macintosh platform.

Minimum Software Requirements

Outlook 2011 has minimum Macintosh hardware and Operating Systems requirements:

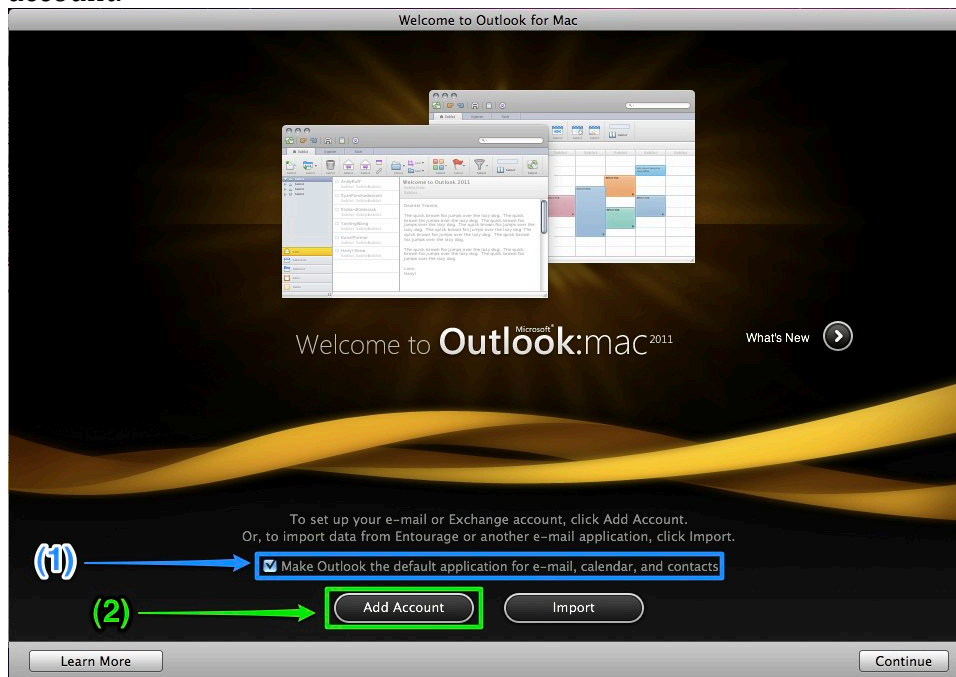
- Hardware - Intel processor Macintosh (PowerPC not supported)
- OS – Mac OS X 10.5.8 Leopard updated to the most current version)

Note: Installation of Microsoft Office 2011 is beyond this scope of this document. This document assumes Microsoft Office 2011 is already installed and updated to the most current version.

FIRST LAUNCH OF OUTLOOK 2011 INSTRUCTIONS

These instructions are for the first launch of Outlook 2011. If you have already launched or been using Outlook 2011, please skip ahead to the [Setting Up A New Account In Outlook 2011](#) instructions on page 5.

(1) Launch Outlook 2011. On first launch you will be prompted to set up a new account.



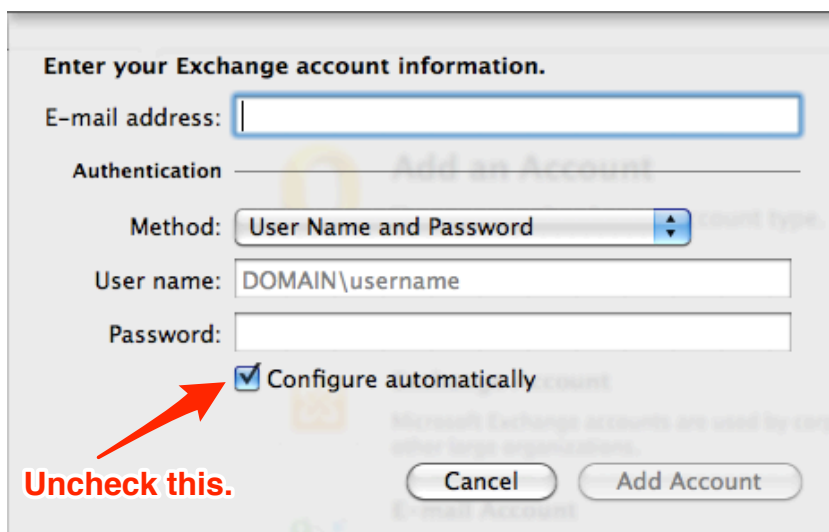
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If you want Outlook 2011 to be your default email, calendar and contact manager, check of the checkbox for **(1) *Make Outlook the default application for e-mail, calendar, and contacts.*** (circled in blue).

If you do NOT want Outlook 2011 to be your default email, calendar and contact manager, do NOT check this box.

Click the **(2) *Add Account*** button (circled in green).

(2) You will be prompted to add the account information.



Enter your Exchange account information.

E-mail address:

Authentication

Method:

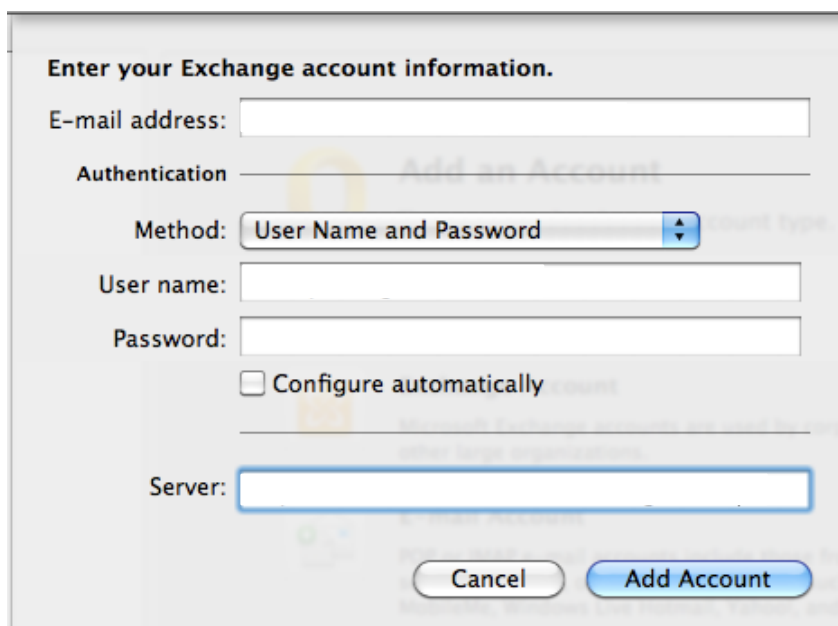
User name:

Password:

Configure automatically

Uncheck this.

(3) Uncheck the ***Configure Manually*** checkbox so that the window changes and looks like the following picture.



Enter your Exchange account information.

E-mail address:

Authentication

Method:

User name:

Password:

Configure automatically

Server:

Outlook 2011 Setup For ITS Exchange 2010 Server Using A SOM Domain Login

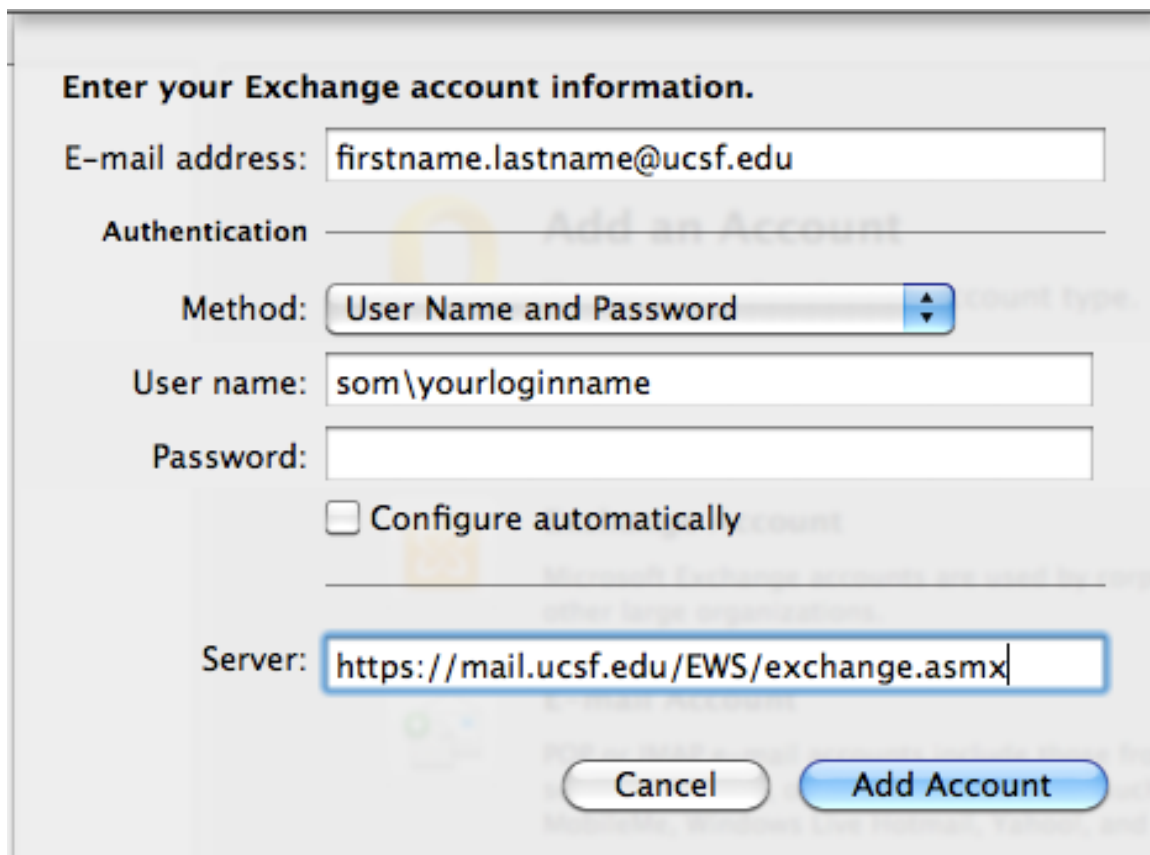
You will need to enter you information in the following format

E-Mail address: *firstname.lastname@ucsf.edu*
Method: *User name and Password*
User name: *som\yourloginname*
Password: *your regular login/email password*
Server: *https://mail.ucsf.edu/EWS/exchange.asmx*

IT IS CRITICAL THAT YOUR EMAIL ADDRESS BE IN THIS FORMAT

It does not matter what your departmental email address is. Your departmental email address should NOT be used here. If you use your departmental email address you will NOT be able to login and check your email.

Here is a screenshot of the completed window.



The screenshot shows the 'Enter your Exchange account information' dialog box in Outlook 2011. The fields are filled with the following information:

- E-mail address:** `firstname.lastname@ucsf.edu`
- Authentication Method:** `User Name and Password` (selected from a dropdown menu)
- User name:** `som\yourloginname`
- Password:** (empty field)
- Configure automatically** (unchecked)
- Server:** `https://mail.ucsf.edu/EWS/exchange.asmx`

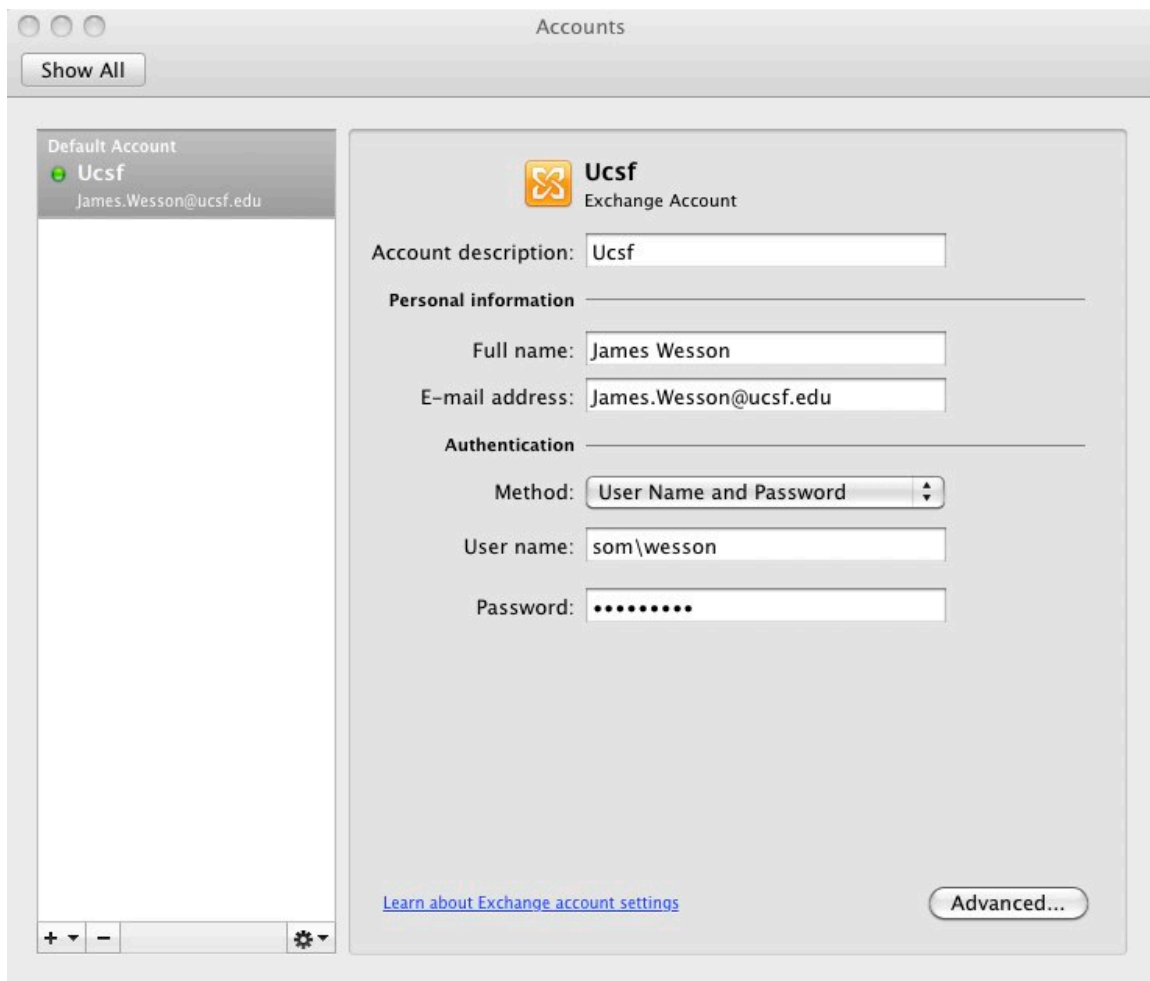
At the bottom of the dialog, there are two buttons: **Cancel** and **Add Account**. The **Add Account** button is highlighted with a blue border.

(4) Click the **Add Account** button.

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You are almost finished. If everything was configured correctly and your email account has been migrated to the new Exchange server then your email will begin to show up in Outlook 2011.

Below is a completed setup Account window. The green dot next to the Ucsf account name indicates that the account setup is working and is connect.

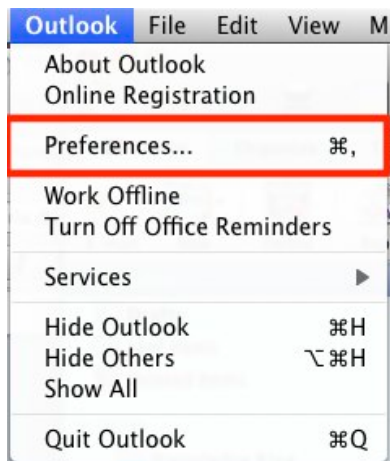


(5) Click the red button in the far upper right-hand corner and close the Accounts window. You can now start using Outlook 2011 to check you email, calendar and contacts for your UCSF email.

Outlook 2011 Setup For ITS Exchange 2010 Server Using A SOM Domain Login

SETTING UP A NEW ACCOUNT IN OUTLOOK 2011

(1) If you have already opened Outlook 2011 and set it up for other email or using it otherwise and you are not prompted with the first launch screen, click on the **Outlook** menu in the upper right hand corner and select **Preferences...** from the drop down menu.

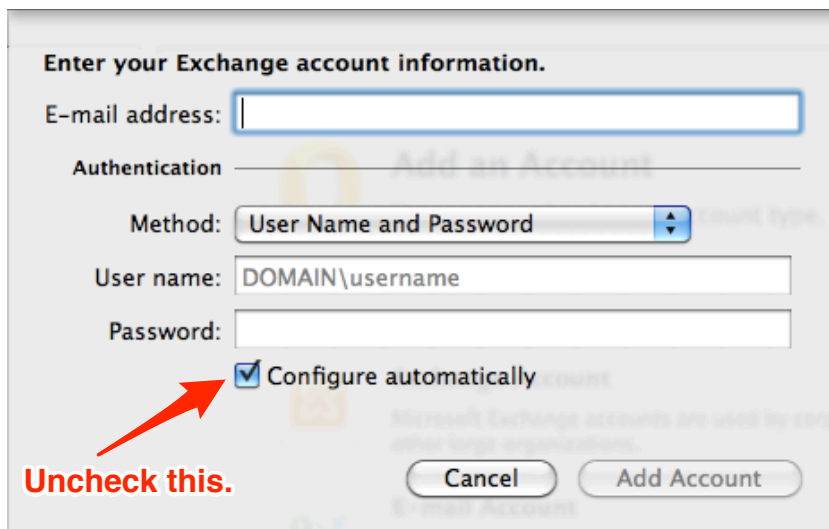


(2) In the **Preferences** window click the **Accounts** button.



Outlook 2011 Setup For ITS Exchange 2010 Server Using A SOM Domain Login

(3) You will be prompted to add the account information.



Enter your Exchange account information.

E-mail address:

Authentication

Method:

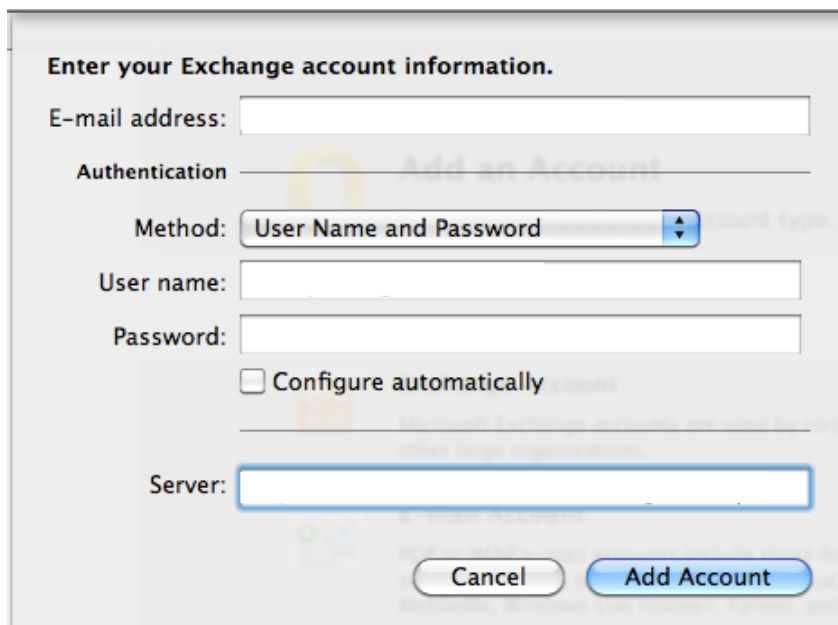
User name:

Password:

Configure automatically

Uncheck this.

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Authentication

Method:

User name:

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Configure automatically

Server:

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Method: *User name and Password*
User name: *som\yourloginname*
Password: *your regular login/email password*
Server: *https://mail.ucsf.edu/EWS/exchange.asmx*

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Configure automatically

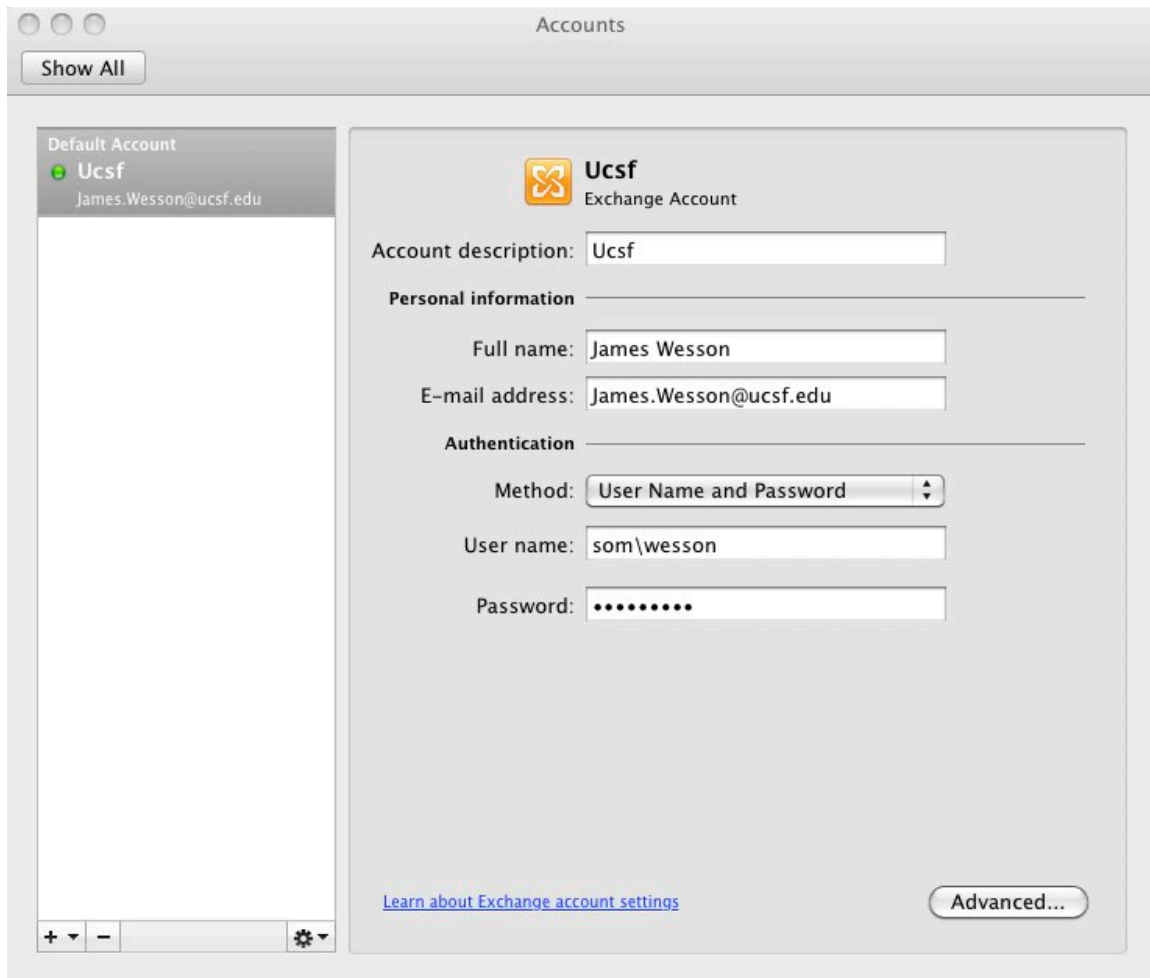
Server:

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