Mac OS Internet Customer Help Sheet No.19
"Installing Microsoft Exchange Client Software For Macintosh"

This document has some hints and tips for installing and setting up the Microsoft Exchange Server Client / Outlook for Macintosh.

PART 1: FIRST CHECKS

Check 1: Make sure you have the most up to date networking software installed on your Macintosh and that it is set up correctly. See Internet help documents Nos. 1, 2d and 3.

Check 2: Check with your network administrator that Exchange Server is installed and setup on an NT Server machine and that your account is setup and ready to use.

Check 3: Make sure you have the following information from your network administrator:

1. Your NT account login details including password if necessary.
2. Your email address.
3. The IP address of the Exchange Server
4. Whether your network has a DNS server.
5. The version of Exchange Server software being run on the network.

Check 4: If you are ***not*** using Exchange Server 5.5 Microsoft recommend that the Macintosh Exchange Client software for Server 4.0 and 5.0 is ***not*** installed on Mac OS 8.0 or later.

PART 2: OBTAINING EXCHANGE CLIENT SOFTWARE

Which version of the Exchange Client you use will depend on the version of the Exchange Server software that is in use:

Exchange Server	Exchange Client To Use
4.0	Install Service Pack 4 on server and use Exchange Client 4.0 on Mac client
5.0	Install Service Pack 2 on server and use Exchange Client 5.0 on Mac client
5.5	Install Service Pack 2 on server and use Exchange Client 8.1 on Mac client

Exchange Client Software	Obtain From
Mac Client 4.0 (Exchange Client)	ftp://ftp.microsoft.com/softlib/mslfiles/sp4_40ma.hqx
Mac Client 5.0 (Exchange Client)	ftp://ftp.microsoft.com/softlib/mslfiles/sp2_50ma.hqx
Mac Client 5.5 (Outlook)	ftp://ftp.microsoft.com/softlib/mslfiles/sp2_55ma.hqx

These archived files are in binhex format. A Macintosh or a Windows PC can download them but they can only be unarchived on a Macintosh. To do this you will need a utility called Stuffit Expander. This software is free and can be obtained from www.aladdinsys.com.

PART 3: CREATING FLOPPY DISK SETS

If you are going to install the Exchange Client software on a Macintosh that does not have a CD-ROM drive use the following steps to create a floppy disk set.

Step 1: Insert a blank floppy disk. Click on its icon once (so it goes dark) and then select "Erase Disk" from the 'Special Menu'. Select "Macintosh 1.44Mb" from the pop-up menu.

Step 2: Once the disk is erased, locate and open the folder with your Exchange Client software in.

Step 3: Copy the "Install Disk 1" name and paste it as the name of the floppy disk.

Step 4: Open the "Install Disk 1" folder and 'select all' the icons.

Step 5: Copy all the items to the floppy disk and when the copy has finished eject the floppy disk.

Step 6: Repeat steps 1 to 5 for each 'Install' folder.

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PART 4a: INSTALLING EXCHANGE CLIENT SOFTWARE

If you are installing Exchange Client 4.0 or 5.0 follow these instructions:

Step 1: Insert "Install Disk 1" or open the first install folder.

Check: Make sure you are not running any applications (only "Finder" is listed in the applications menu – top right).

Step 2: Double click on the installer icon and click "OK" at the welcome screen.
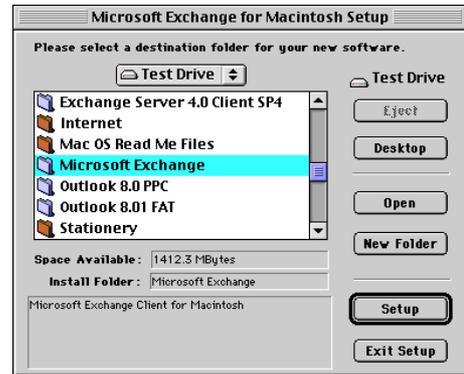
Step 3: If necessary enter your name and company details. Click "OK" to continue.

Step 4: Choose the location to install the Exchange client software to. Microsoft recommends you leave the installation location as suggested by the installer.

Step 5: If you are installing Exchange Client 5.0 at this point you will have the option of a "Complete" or "Minimum" installation. The complete installation option includes the Microsoft Schedule+ software.

Step 6: If you are installing Exchange Client 5.0 at this point you will have the option of "American English" or "British English" dictionaries.

Step 7: When installation is complete you will be asked to restart your Macintosh. Now go to Part 5: "Setting Up Exchange Client Software".

## PART 4b: INSTALLING OUTLOOK CLIENT SOFTWARE

If you are installing Exchange Client 5.5 (Outlook 8.1) follow these instructions:

Step 1: Insert "Install Disk 1" or open the first install folder.

Step 2: Double click on the installer icon.

Step 2: Choose the hard disk and location to install the Outlook client software to (bottom left of the install window). Microsoft recommends you leave the installation location as suggested by the installer.

Step 3: Click the "Install" button.
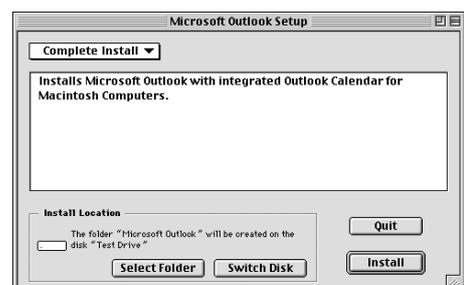
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Step 4:   If necessary enter your name and company details. Click "OK" to continue.

Step 5:   At this point you may get a dialogue box similar to the one on the right. Click "Yes" if you want to have an alias/shortcut for the Outlook application on your desktop.

Step 6:   When installation is complete you will be asked to restart your Macintosh.

PART 5: SETTING UP THE EXCHANGE CLIENT

This section will take you through the process of setting up your Exchange Client software (Exchange Client or Outlook) on the Macintosh computer and making a connection to your Exchange Server.

Step 1:   Double click on the icon for Exchange Client or Outlook.

Step 2:   If you are using Exchange Client 5.0 or Outlook select the most appropriate time zone for the location you are at using the pop-up menu in the Set Time Zone dialogue box then click "OK".
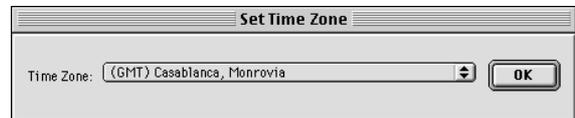
Step 3:   At this stage Microsoft recommend setting up your profile automatically. Reasons for not doing this might be that you want to set up multiple profiles on the same machine or you are working offline without a network connection. Click "Next".

Step 4:   Enter the name of your Exchange Server and the name of the mailbox you wish to connect to. Then select connection via AppleTalk or via TCP/IP. Click "Next".

Note: If you select "AppleTalk" the NT Server running Exchange must also have Services For Macintosh installed, with an AppleTalk zone setup and MacFile name must be identical to the Exchange Server name.

Note: Microsoft recommends only selecting TCP/IP if your network has a DNS server. Otherwise you may run into problems. See Knowledge Base article #149596.

Step 5:   If you travel with your computer and wish to be able to compose messages off line click "Yes" at this dialogue box. Click "Next".

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Step 6:   If you already have a personal address book you can click on "Browse" to locate it otherwise enter a name for your address book and click "Next".

Note: Microsoft recommends leaving the name of your address book as the default "Personal Address Book".

Step 7:   You have now setup your exchange client.

FREQUENTLY ASKED QUESTIONS

Q. I've set up my Exchange Client as per this document but I'm having trouble connecting to the Exchange Server?
A. Use the Knowledge Base article #149596 to troubleshoot this scenario.

Q. I'm confused about which System Software version I should be using?
A. If you are going to use Exchange Client 4.0 or 5.0 use this chart:

If Your System Version Is	Recommended Action
B1-7.0	Upgrade to a minimum of System 7.1.
B1-7.1, B1-7.1.1, B1-7.1.2	Upgrade the OS or install Open Transport 1.1.2.
B1-7.5, B1-7.5Px	Upgrade using System 7.5 Update 2.0.
B1-7.5.1, B1-7.5.2, B1-7.5.3	Upgrade using System 7.5 Update 2.0.
B1-7.5.3 Update B1-2.0	You have the option of installing System 7.5.5 Update.
B1-7.5.3 Revision 2.x	You have the option of installing System 7.5.5 Update.
B1-7.5.5	No action required.
B1-7.6	Upgrade using Mac OS 7.6.1 Update.
B1-7.6.1	No action required.
B1-8.0, B1-8.1, B1-8.5	Downgrade to Mac OS 7.6.1.

A. If you are going to use Outlook Client 8.1:

If Your System Version Is	Recommended Action
B1-7.1, B1-7.1.1, B1-7.1.2	Upgrade the OS or install Open Transport 1.1.2.
B1-7.5, B1-7.5Px	Upgrade using System 7.5 Update 2.0.
B1-7.5.1, B1-7.5.2, B1-7.5.3	Upgrade using System 7.5 Update 2.0.
B1-7.5.3 Update B1-2.0	You have the option of installing System 7.5.5 Update.
B1-7.5.3 Revision 2.x	You have the option of installing System 7.5.5 Update.
B1-7.5.5	No action required.
B1-7.6	Upgrade using Mac OS 7.6.1 Update.
B1-7.6.1	No action required.
B1-8.0	Upgrade using Mac OS 8.1 Update.
B1-8.1	No action required.
B1-8.5	Upgrade using Mac OS 8.5.1 Update.

Q. In the above Q&A it says to downgrade to Mac OS 7.6.1 but my Macintosh only supports Mac OS 8.0/8.1/8.5?
A. You are advised to upgrade your Exchange Server software and then upgrade your Macintosh client software to Outlook 8.1 using the Exchange Server 5.5 Service Pack 2 update. This version of the Outlook client is compatible with Mac OS 8.5.

Q. I tried to download the Exchange Server 5.5 Service Pack 2 update but I cannot find it?
A. Try ftp://ftp.microsoft.com/bussys/exchange/exchange-public/fixes/Eng/Exchg5.5/SP2/Mac/SP2_55MA.hqx

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Q. I use/have come across Outlook version 8.0/8.01. What is it and why don't you list it here?
A. These are earlier versions and did not support 68000 series Macintosh computers, Mac OS 8.0 and later and they had several issues that were fixed in version 8.1. You are highly advised to install and use Outlook 8.1 as outlined in this document.

Q. I have Exchange Client 4.0 and I want to create a floppy disk install set but the instructions here don't work?
A. Unfortunately Exchange Client 4.0 only comes as a single, large installer and a floppy disk set can only be created using unsupported third party utilities like Apple's Disk Copy. Microsoft recommends either installing from the CD or if you don't have a CD-ROM drive installing from a network share.

Q. Can I use the Macintosh Exchange Client software using a dial up connection from a Macintosh computer to a Microsoft RAS server?
A. Yes you can and Knowledge Base article #163330 explains how to do this.

Q. The connection to the server works but I am having trouble sending/receiving attachment files to/from Windows or external email addresses outside our network?
A. Attachments can lose their Mac OS resource forks if sent via email. You are advised to archive any attachments before sending them (see General Help Sheet No. 6 "Mac & Windows Files").

Q. You recommend installing Service Packs for the Exchange Server software but I am not the network administrator. What do I do?
A. Contact your network administrator with the suggestion and advise them to check the Microsoft support web site or telephone based technical support for advice on running the latest up to date versions of their server software. These support information resources will also be able to advise on obtaining and updating their software and getting the latest Exchange Client software for you.

Q. The Macintosh Exchange Client Software differs greatly from Outlook 97/98?
A. This is correct. Outlook 8.1 is the latest version of Outlook for Macintosh. There is no Macintosh equivalent to Outlook 97/98 for Windows.

Q. If there is no Macintosh equivalent to Outlook 97/98 for Windows are there compatibility problems?
A. Yes. Exchange Client for Macintosh has limited capabilities in comparison to Outlook 97/98 and its scheduling feature is based on Microsoft Schedule+ not Outlook Scheduling. Also Outlook 8.1 does not support HTML Email.

Q. Will these incompatibilities be fixed?
A. Future versions of Microsoft's email software will begin to fix some of these incompatibilities.

PLEASE NOTE

- Where third party software is mentioned this is not a recommendation or endorsement by Microsoft and the information is offered as a guideline only. Microsoft cannot guarantee the workings of any of the third party products or Apple software mentioned.

- Microsoft can only support customers that have valid support with us. Just because you have a Microsoft product or customer number it does not automatically entitle you to support. If you are unsure about the validity of your support ring 0870 5010100 and quote your customer ID.

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