

## GETTING STARTED: Hosted Exchange – OCT Setup

Welcome to Apptix®! This PDF contains instruction for connecting your Apptix Hosted Exchange mailbox to Outlook using our automated Outlook Connection Tool (OCT).

### Apptix Client Support Services

#### Contact Technical Support

24/7 Toll-free technical support is available to all hosted Exchange 2007 administrators:

**866.428.0128** (US/Canada)

International callers, please dial:

**281.733.2644**

Send email to:

[clientsupport@hostaccount.com](mailto:clientsupport@hostaccount.com)

#### Billing Contact

Call **866.428.0128** between 9 AM and 5 PM (Eastern Time)

Send email to:

[billing@hostaccount.com](mailto:billing@hostaccount.com)

### How to Setup Outlook

Follow this guide to quickly setup your Outlook Profile using the automated options for connecting your Outlook software to your Exchange mailbox.

### How to Import My Personal Folder File (PST)

Use the PST import section of the document to populate your mailbox with legacy data from a PST (personal folder) file.

### Admin Console Guides

Company administrators (typically the technical and/or billing contact for your account) may access the Admin Console to manage your mailbox size, email aliases, forwarding, add and remove mailboxes, change display names, change passwords & user logins, etc.

- [AOD Admin Guide Exchange.pdf \(115 Pages\)](#): This guide provides the detailed instruction needed to perform administrative functions for managing your Apptix Exchange account.
- [AOD Quick Reference Guide Exchange.pdf \(3 Pages\)](#): This guide provides quick reference to menu navigation and a summary overview of the features found in the Exchange Admin Console.
- [Hosted CP End User Guide.pdf \(11 Pages\)](#): This guide provides the detailed instruction of end-user (non-Admins) access to the Hosting Control Panel so that end-users may manage their email aliases, passwords, etc.

### Outlook 2007 – Features – How-To Guide

Click on the link to open a 52-page PDF Document:

[Apptix Outlook2007 Features HowToGuide.PDF](#) for instruction on Outlook 2007's most used and useful features.

### Other Support Resources

Both account Administrators and End Users should be able to access the **Help & Support** menu option/link from the Hosting Control Panel. The Help & Support page provides a number of links to other support resources such as PDFs and video tutorials as customer self-help

## HOW TO SETUP OUTLOOK

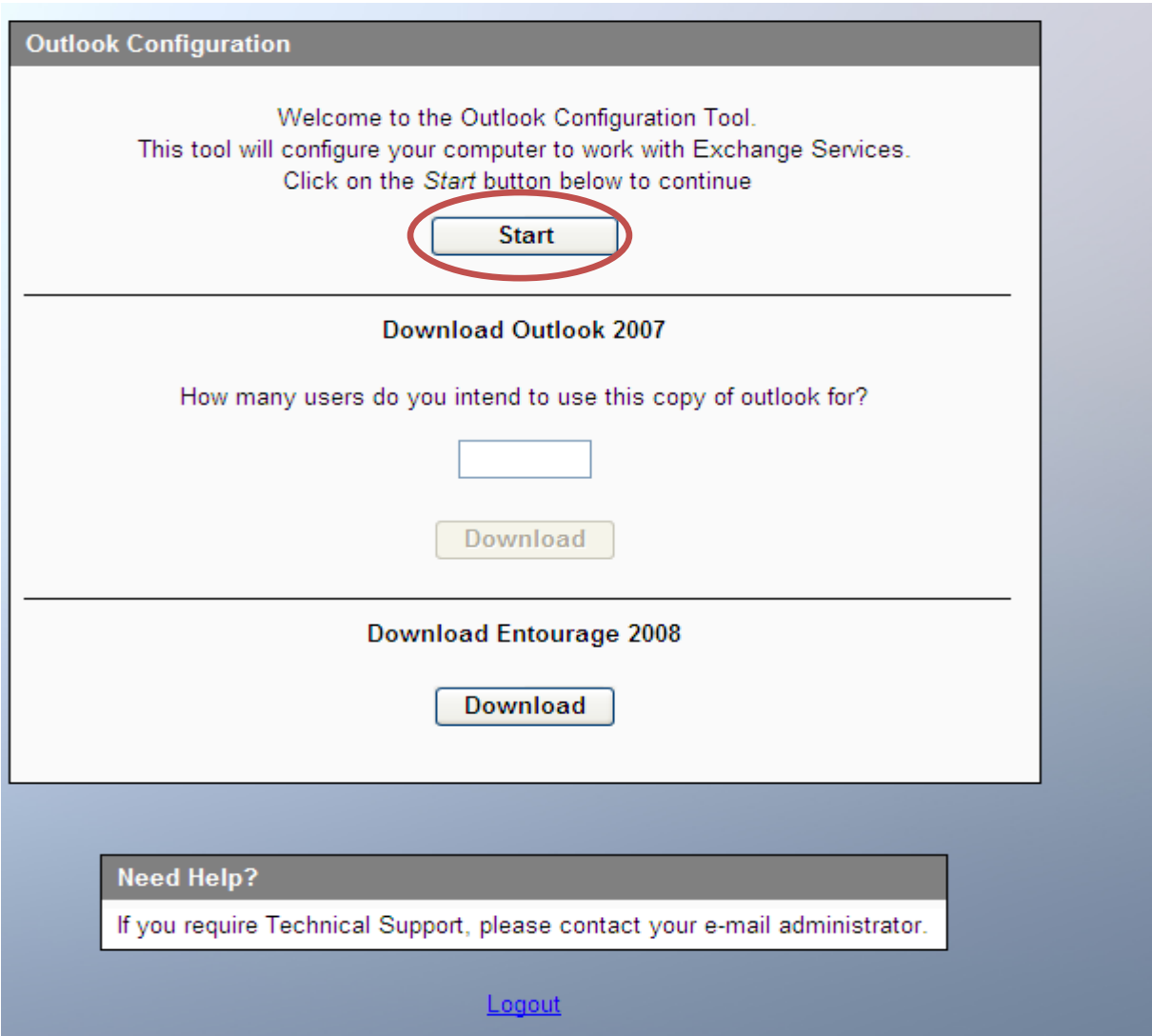
There are two ways to get started using your Apptix Exchange account via Outlook, you can set it up automatically by running the Outlook Configuration Tool (OCT) wizard or you can manually configure your profile.

### Run the Outlook Configuration Tool Wizard

The Outlook Configuration Tool is a wizard that attempts to create an RPC/HTTPS with your Apptix Exchange account by walking you through a series of steps.

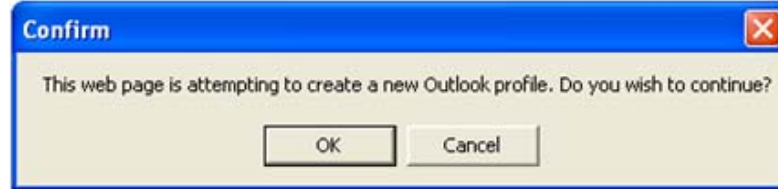
To get to this wizard:

1. Please log into Apptix OnDemand at <https://Oct.collaborationhost.net>
2. Enter your Outlook User Name Ex: **firstname.lastname@yourdomainname.com**
3. Enter your Password to login Ex: **ChgPwd!**
4. Select **Start the Tool** to configure Outlook

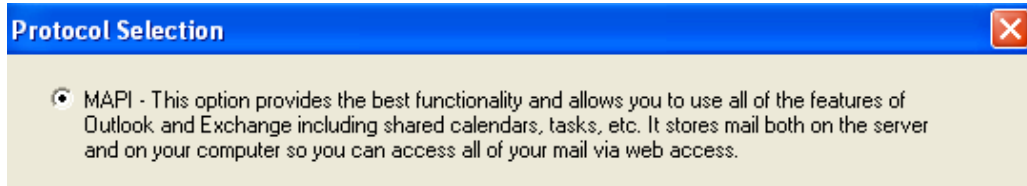


The screenshot shows the Outlook Configuration Tool wizard. The title bar reads "Outlook Configuration". The main content area has a grey header with the text "Welcome to the Outlook Configuration Tool. This tool will configure your computer to work with Exchange Services. Click on the Start button below to continue". A "Start" button is highlighted with a red oval. Below this, there are two sections: "Download Outlook 2007" and "Download Entourage 2008". The "Download Outlook 2007" section includes a text input field for the number of users and a "Download" button. The "Download Entourage 2008" section includes a "Download" button. At the bottom, there is a "Need Help?" section with the text "If you require Technical Support, please contact your e-mail administrator." and a "Logout" link.

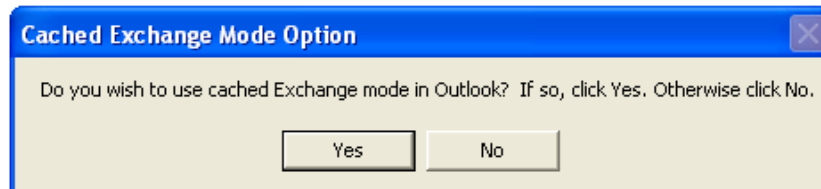
5. Click OK to create a new profile.



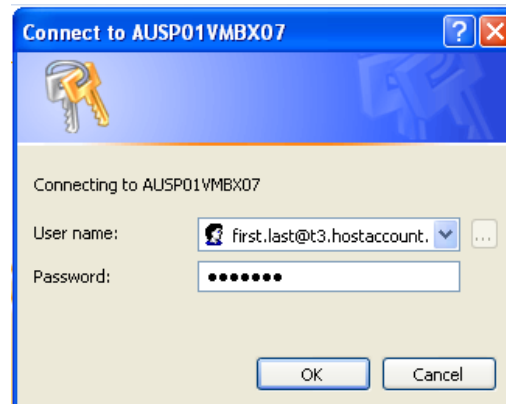
6. Select MAPI to create a full Outlook Profile and hit continue.



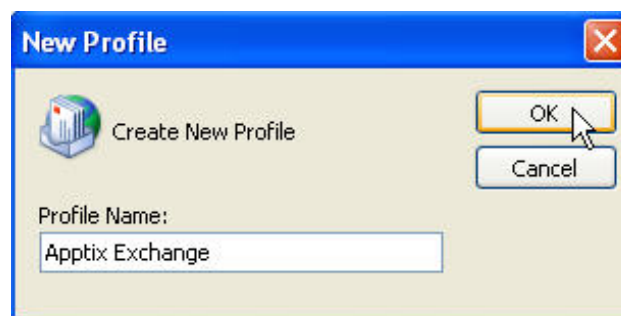
7. Select Yes for Cached Exchange mode.



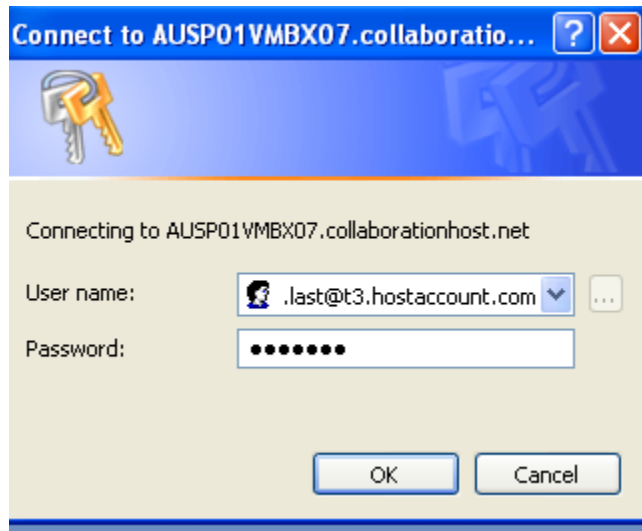
8. Enter your email address and password.



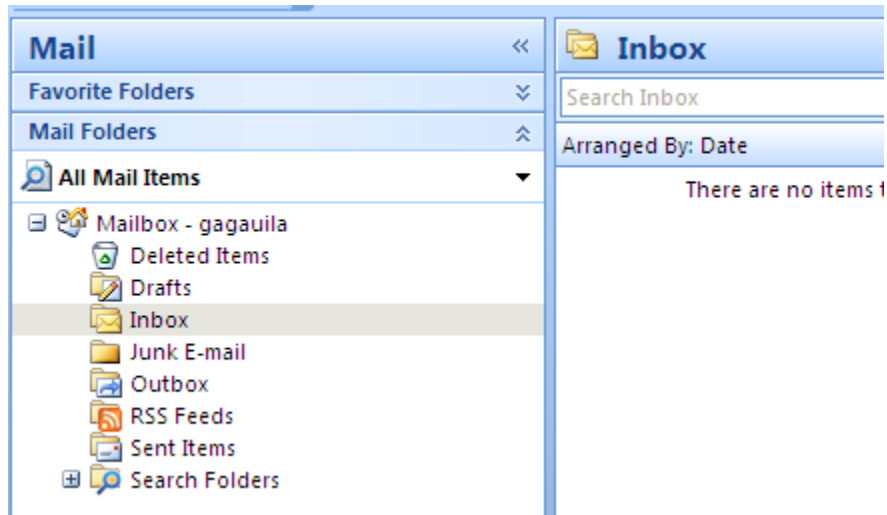
9. Enter the name of the profile you want to create. This will be the name of the profile that you login to.
  - a. This can be any name of your choosing. In this example the profile name is **Apptix Exchange**.



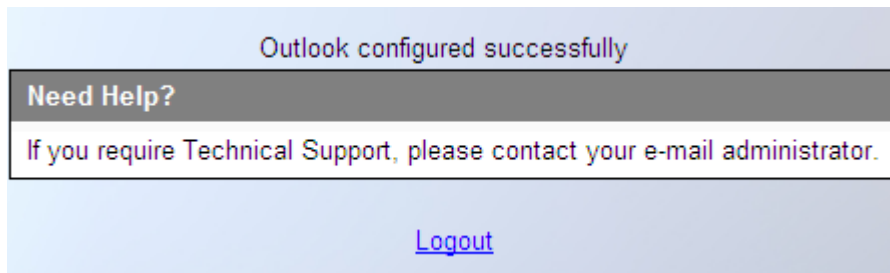
10. The system asks for your email address and password , please enter.



11. Outlook profile completes and mailbox is open.



12. Logout of the tool



Click **OK** again, and then **Next**, and then **Finish**. Open Outlook, select the Profile and log in!

## HOW TO IMPORT EMAIL FROM MY PERSONAL FOLDER FILE (PST)

*There are two ways to import the legacy email data that is contained in your existing personal folder file (.pst), you can call us and have us help migrate your old email or you can do it yourself.*

### Assisted Data Migration

With assistance from your Hosted Exchange Provider, customers can migrate from their old email environment via a PST migration. Assisted PST migrations are partially performed by the customer (the extraction and transmission of data) and partially by your Hosted Exchange Provider (the loading of data).

This type of migration assumes either that the customer is currently using email from a Microsoft Exchange environment, or otherwise has the ability to create PST files (explained below) from their existing email. Typically assisted migrations occur over a one to two week period.

For more information about assisted data migrations please contact Apptix Customer Support Services:

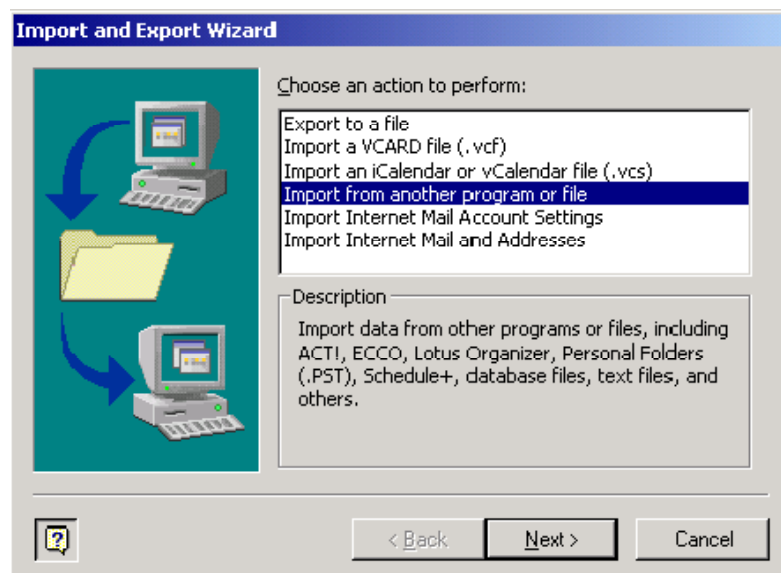
24/7 Toll-free technical support, please dial:  
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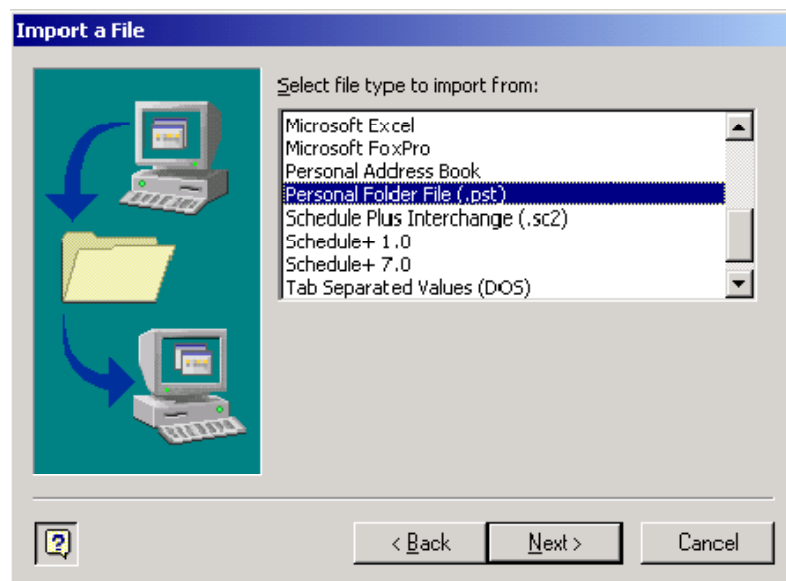
Send email to: [clientsupport@hostaccount.com](mailto:clientsupport@hostaccount.com)

### Do-It-Yourself Data Migration

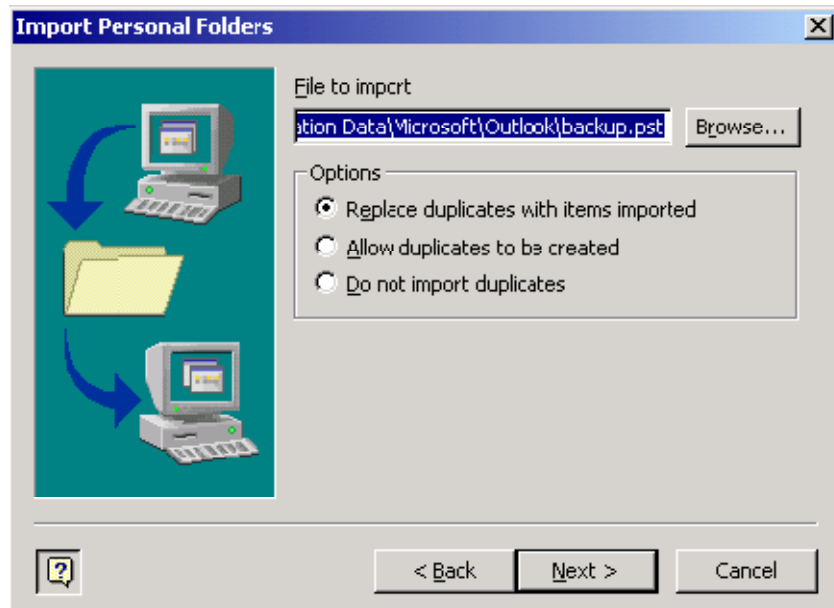
1. Launch Outlook, using a profile pointing to the new environment.
2. From the **File** menu, select **Import and Export...**
3. Select **Import From Another Program or File**
4. Click **Next >**



- From the list of file types, select Personal Folder File (.pst).



- Browse to the PST you want to import.

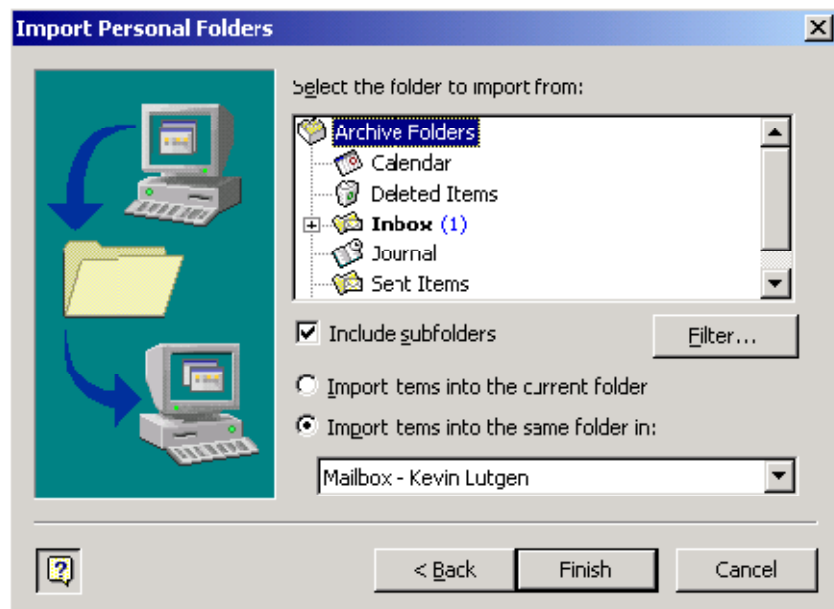


If you want to import more than one file you will need to perform a separate import for each file.

- Specify how to handle duplicate items and click **Next**.

8. Select the folders from the PST to import.

*In most cases this will be the entire personal folder, but in some cases you may only want to import a single folder, like the "Inbox" or "Calendar." To select the entire PST, highlight the top level folder and check the "Include subfolders" checkbox. Specify the folder into which the data should be imported. Usually, you will want to select "Import items into the same folder in:" and select your Exchange mailbox*



9. Click **Finish** to begin the import. Depending upon the size of the PST file, this may take several minutes or longer.

**NOTE:** See *How To Guide-Outlook 2007* | PST section for detailed instruction on Personal Folder Files (PSTs). This document is available from our customer service portal as part of customer support resources.