YaleConnect "Connection Issues" Troubleshooting Checklist (Mac Outlook 2011 and Entourage 2008 EWS)

Background: YaleConnect connection issues can occur for a number of reasons. The checklist below covers possible resolutions and troubleshooting techniques for connection issues. After the checklist is completed, please include all steps that were used to resolve the issue in the ticket. If the ticket cannot be resolved and needs to be escalated, this information is essential.

Before escalating please check the following (See Below for Details on Items):

1. Check Outlook Web App (OWA)
2. System Reboot: Has the system been rebooted since any server or client changes have been made?
3. VMWare Fusion Networking setting (if applicable)
4. Check e-mail client versions
5. Verify Windows/MAC e-mail client settings
6. Check for large item counts (Apple Mail)
7. Re-sync local email cache
8. Create new Outlook Profile, Repair MAC database/Create new MAC Identity, Rebuild Apple Mail index/Add New Account
9. Check item count in critical path files, these are the Calendar, Contacts, Inbox, and Sent Item folders.
10. Repair/Remove & Reinstall Office (if applicable)

When an escalation is necessary please provide the following in the Service Now ticket:

1. Detailed description of problem, including any error message(s), connection status info (from step 4), wired or wireless network connection.
2. Operating System and latest update level
3. Email Client Software and latest update level; if OWA light, include browser and version
4. Detailed description of troubleshooting steps taken to reach escalation point.

YaleConnect Email & Calendar Troubleshooting Checklist - Companion Sheet

Escalation Process Checklist Detailed Descriptions:

1. Check OWA - YaleConnect webmail (http://connect.yale.edu). Outlook operates in "cached exchange mode" and uses an .OST to store cached data from the server. This file may become corrupt. Verify OWA functionality by Sending and Receiving email, if the mailbox works in OWA it is most likely an issue with the local client or user.
2. System Reboot – Verify if the system has been rebooted since any changes were made. If not reboot.
3. VMWare Fusion (If applicable): Verify VMWare Fusion Networking is set to "Bridged" mode not "NAT"
4. Check e-mail client versions (ITS recommended clients below)
o For PC users - Outlook 2010 (including all subsequent office updates) is the current recommended version

o For Mac users – Outlook 2011 14.2.2 or Entourage 2008 EWS 13.1.2 are the current recommended version

5. Verify Windows/MAC e-mail client settings – Verify the e-mail client settings are correct. Specifically:
   o MAC: Outlook 2011, Entourage 2008 EWS:
     1. Microsoft Exchange or Server Information
        ▪ Server: https://connect.yale.edu/ews/exchange.asmx
        ▪ Verify Use SSL is checked (Port: 993)
     2. Directory service or LDAP Server
        ▪ Server: yu.yale.edu
        ▪ Verify Log in with my Exchange account credentials or This server requires me to log on is checked

6. Check for large item counts (AppleMail)

7. Re-sync local e-mail cache
   o MAC: Outlook 2011/Entourage 2008 EWS: Empty Cache (This re-syncs server data)
     1. Ctrl Click desired folder (Inbox, Sent Items, etc…)/ Click Folder Properties / General Tab / Click Empty button

8. Create new Outlook Profile, Repair MAC database/Create New MAC Identity, Rebuild Apple Mail Index/Add New Account
   o MAC: Outlook 2011/Entourage 2008 EWS – Repair the database to see if this resolves the issue. If the database repair does not resolve it try a New Identity
     1. Outlook 2011, Entourage 2008 EWS Database Repair
        ▪ MAC: Outlook 2011
          ▪ Press the "Option Key" while opening Outlook
          ▪ Select the Identity and click the "Rebuild" Button
        ▪ Entourage
          ▪ Press the "Option Key" while opening Outlook
          ▪ Select the Identity and click "Rebuild Database"
          ▪ Click Continue
        ▪ MAC: Outlook 2011
          ▪ Press the "Option Key" while opening Outlook
          ▪ Click the "+" button
        ▪ Entourage
          ▪ Click Entourage Menu / Switch Identity… / Click Switch button
          ▪ Click New… button to add a new identity and go through the steps of setting up the Email Account in the new identity

9. The recommendations from the Exchange Team Blog is no more than about 2500 - 5000 messages in any of the critical path folders. The critical path folders are the Calendar, Contacts, Inbox, and Sent Item folder. Ideally, keep the Inbox, Contacts and Calendar to 1000 or less.
10. Repair/Remove & Reinstall Office: Depending on the issue reported use as a last resort to resolve. (if applicable)

Detailed instructions for all topics can be found here: http://www.yale.edu/its/connect/index.html