YaleConnect "Connection Issues" Troubleshooting Checklist (For Outlook 2003, 2007 & 2010)

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 "Connection Status" (Windows Outlook Only)
5. Check e-mail client versions
6. Verify Windows/MAC e-mail client settings
7. Repair Outlook Profile (Outlook 2007 & 2010 only)
8. Re-sync local email cache
9. Create new Outlook Profile, Repair MAC database/Create new MAC Identity, Rebuild Apple Mail index/Add New Account
10. Check item count in the critical path folders, These are the Calendar, Contacts, Inbox, and Sent Item folder
11. 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 "Connection Status" (Windows Outlook Only):
1. Ctrl + Right Click the Outlook icon in the system tray
2. Select Connection Status…
3. Verify all connections are "Established"
4. Click Reconnect Button and verify all connections re-establish

5. Check e-mail client versions (ITS recommended clients below)
   a. For PC users - Outlook 2010 (including all subsequent office updates) is the current recommended version
   b. For Mac users – Outlook 2011 14.2.2 or Entourage 2008 EWS 13.1.2 are the current recommended version

6. Verify Windows/MAC e-mail client settings – Verify the e-mail client settings are correct. Specifically:
      1. Account Settings / Server Settings
         i. Server: outlook.connect.yale.edu
      2. Account Settings / More Settings… / Connection Tab / Exchange Proxy Settings
         i. Verify On fast networks, connect using HTTP first, then connect using TCP/IP is checked

7. Repair Outlook Profile (Outlook 2007 & 2010 only)
   a. Outlook 2010: File / Account Settings / Account Settings
      1. Select Exchange Account / Click Repair Button
   b. Outlook 2007: Tools / Options / Account Settings
      1. Select Exchange Account / Click Repair Button
   c. Outlook 2003:
      1. Under the "Tools" menu, choose "Email Accounts"
      2. Select "View or Change Existing…”
      3. Click on "Change"
      4. Change the Exchange server name from "connect.yale.edu" to "outlook.connect.yale.edu"
      5. Click on "Check Name" and make sure that it completes successfully.

8. Re-sync local e-mail cache
   a. Windows: Outlook 2003, 2007, & 2010: Delete .OST (Paths to the .OST file are below)
      1. Outlook Windows XP: C:\Documents and Settings\NetID\Local Settings\Application Data\Microsoft\Outlook
      2. Outlook Windows 7: C:\Users\NetID\AppData\Local\Microsoft\Outlook

9. Create new Outlook Profile, Add New Account
   a. Windows: Outlook 2003, 2007, & 2010 (Create New Outlook Profile) – If a new profile resolves the issue, the old profile was corrupt and the new one should be used. Profile based info will have to be recreated in the new profile (Rules, Filters, Local .PST’s, etc…)
      1. Open Control Panel / User Accounts / Mail / Click Show Profiles… button
      2. Add… a new profile and go through the steps of setting up the Email Account in the new profile
10. 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

11. 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