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<th>#</th>
<th>Question</th>
<th>Not relevant (why?)</th>
<th>Checked</th>
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</table>
| 1  | Has the user been talked through the ‘Outlook Connectivity Guided Walkthrough’, if relevant?  
It should be used for these problems:  
- Prompts for credentials  
- Certificate errors  
- Client disconnects  
- Offline Address Book download issues  
- Autodiscover issues |                     |         |
| 2  | Is the user’s copy of Outlook fully patched?  
For Windows users Outlook 2007 should be running at least SP3; Outlook 2010 should be on SP2; Outlook 2013 should be running SP1. Mac users, with Outlook 2011, should be running the 14.4.1 update (or later) |                     |         |
| 3  | Have you, or the user, run ‘Office Diagnostics’?  
Either run it from within Outlook (Help > Office Diagnostics) or as a separate application (Start > All Programs > Microsoft Office > Microsoft Office Tools > Microsoft Office Diagnostics). |                     |         |
| 4  | Is the user’s version of Outlook still supported?  
Without extended support contracts in place only Outlook 2010 and 2013 (Windows) and Outlook 2011 SP2 or later (Macintosh) are vendor-supported versions. Older versions are therefore a ‘best endeavours’ support model only. Any user with a performance issue should be advised to upgrade to a supported version in the first instance.  
Outlook 2007 mainstream support ended 9th October 2012.  
Outlook 2003 mainstream support ended 14th April 2009.  
| 5  | Is Outlook correctly configured as an Outlook Anywhere connection to Exchange? Check that the user hasn’t erroneously configured a POP3 or IMAP4 connection. |                     |         |
| 6  | Is the user accessing Outlook via a terminal server? Have you checked that no other sessions are also running as that user? – they often don’t log out. |                     |         |
| 7  | Is their Outlook configured to use cached mode?  
In almost every situation having Outlook in cached mode will outperform non-cached mode. IT support staff should not recommend uncached connections without very good reason. If a ticket is opened with IT Services, |                     |         |

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2 Until 13/10/2015  
3 Until 10/04/2018  
4 Until 12/01/2016  
5 Support ends 12 months after the next service pack releases or at the end of the product’s support lifecycle, whichever comes first.  
6 Cached mode may have slower responsiveness to new messages but this is due to Outlook parcelling up server requests into more efficient periodic communications. In practice this may mean that an incoming email takes a few seconds longer to appear in the mailbox but is a far more efficient use of a client’s network bandwidth and processor resource. The larger the mailbox is, the greater the possible efficiencies will be from caching. Any mailbox that is, say, over a few hundred megabytes in size will benefit from caching.
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<td><strong>8</strong></td>
<td><strong>Does Outlook have third-party add-ins loaded?</strong> Is the problem still present when those are disabled?</td>
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<td><strong>9</strong></td>
<td><strong>Does the user have over 500 folders, either in their own mailbox or across all of the mailboxes they access?</strong> Performance can be affected if you access more than 500 folders on the same mailbox server, even if they’re not all within your own mailbox. If this is the case, log a ticket to have a shared mailbox moved to a different server. Reorganising to a smaller number of folders can also improve client-side performance.</td>
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<tr>
<td><strong>10</strong></td>
<td><strong>Does the user have over 10,000 items in any one folder?</strong> An ‘excessive number’ of items in any one folder can affect performance. The exact threshold will vary. We use a guideline figure of 100,000 messages, but if there are a great many of them with very large attachments a user’s performance may still suffer.</td>
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| **11** | **Does the user access any shared mailboxes?** These may be automapped, added as a secondary Exchange account or via the ‘open other mailbox’ dialogue. Remove any that may be unnecessarily included, from all three locations. To remove automapped entries, contact IT Services Registration with both the username and mailbox names very clearly identified (via SSO/alias or by email address) Mailboxes mapped multiple times via these different routes will harm performance. Automapping status and who may have Full Access to the mailbox can be checked via [https://register.it.ox.ac.uk/itss/unitinfo -> Nexus mailboxes](https://register.it.ox.ac.uk/itss/unitinfo -> Nexus mailboxes) (see “Delegated access”) **N.B.**  
  - Outlook 2007 will appear slower than other versions as it does not – by default – cache secondary mailboxes. More recent versions of Outlook will do this so, again, recommend an upgrade if the user has lots of shared mailboxes.  
  - **There is a performance-affecting limit of 500 folders.** This figure can be reached cumulatively across all mailboxes you view within Outlook. It is worth finding out which mailbox server each mailbox is on to see if the 500 folder limit has been exceeded. This can be resolved by asking for a mailbox (probably the user’s personal mailbox) to be moved to a different server. |
| **12** | **What, if anything, is reported in that user’s ‘sync issues’ folder within Outlook?**  
  ‘Sync issues’ are local data (not copied to the server) which record any problems with Outlook’s connectivity to the server.  
  ‘Conflicts’ occur when you have two conflicting versions of the same item.  
  ‘Local failures’ show offline items that have not been copied to the server. This may explain why an item shows in Outlook but not on other computers, or when logged on to OWA.  
  ‘Server failures’ are items that Outlook failed to synchronise from the server. The content of the server failures folder is only available when connected to the server. |
Pre-Outlook 2010, Microsoft advised that synchronisation errors can often be fixed by running the OST integrity checking tool (SCANOST.EXE\(^7\)). Current advice is to export to a local PST (in case of ‘local failures’), delete the current OST file and allow the OST to rebuild. If this is not an option you can analyse the OST using SCANPST.EXE\(^8\), although this is a lengthy process.

**N.B.** Scan logs are stored in the ‘Deleted Items’ mailbox folder.

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| 13 | **Have you run the OFFCAT\(^9\) diagnostic tool?**  
Please attach the diagnostic report to any tickets passed to the IT Services helpdesk. |
| 14 | **Is the user running the updated search service on Windows XP?**  
This can have a big impact on low-spec PC performance and it queries Outlook extensively to generate its indexes. Consider uninstalling this to improve Outlook’s performance.  
**Look at the processor and memory figures from the 'general' tab in the System Properties control panel to identify an obsolete or under-specified PC.** Please also note what other performance-related diagnostics you’ve undertaken (if you’ve run chkdsk, defrag, task manager process review, event log review etc.) |
| 15 | **Have you restarted the computer in MSCONFIG’s diagnostic mode to see if Outlook’s performance improves?**  
This will show that the issue relates to other local software rather than a Nexus server issue. Diagnosis of the offending software should be directed to local IT support staff. |

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\(^7\) [http://support.microsoft.com/kb/983036](http://support.microsoft.com/kb/983036)

\(^8\) [http://support.microsoft.com/kb/272227](http://support.microsoft.com/kb/272227)

\(^9\) [http://support.microsoft.com/kb/2812744](http://support.microsoft.com/kb/2812744)