

# DSA Email Migration v20161114

## Department User Steps – A Quick Start Guide



Though most of the migration is automated, there are some simple steps you must follow to switch to your campus user mailbox and calendar, as well as some optional items to consider.

On migration day when you arrive, you will simply...

Log off & log back on  
to your DSA  
Windows computer



Complete the  
Outlook wizard that  
pops up



Setup your DSA  
Email Signature



:)

...and now you are using your campus Exchange account (see [Instruction #1](#)).

Some other email account related items to consider before migration day:

- ⇒ Do you have work email setup on your personal cell phone or other device?
  - If no, you're ready!
  - If yes, you will need to update the device(s) on migration day (see [Instruction #2](#)).

- ⇒ Do you use your *NetID@tamU.edu* as your primary/published email address?
  - If no, meaning you use your *@dept.tamU.edu* address, you're ready!
  - If yes, you will need to update Gateway.tamU.edu and notify the DoIT Service Desk (see [Instruction #3](#)).

- ⇒ Did you setup Outlook email rules to automatically sort your email into folders?
  - If no, you're ready!
  - If yes, you can copy the rules ahead of time and re-use them on campus Exchange (see [Instruction #4](#)). You can also recreate them later if you prefer.

- ⇒ Did you enable Outlook to AutoArchive your email based on age?
  - If no, you're ready!
  - If yes or you are unsure, you can verify and see where the archive (PST) file is stored (see [Instruction #5](#)). Note: AutoArchive is not on by default and most users do not use it.

- ⇒ Do you access a shared Mailbox?
  - If no, you're ready!
  - If yes or you are unsure, you can verify what they are called now and then re-add them on migration day after completing the Outlook wizard (see [Instruction #6](#)).

- ⇒ Do you access a shared Calendar or share yours with someone else? This might be a co-worker that has shared out their calendar or a dedicated group calendar for room reservations or a committee.
  - If no, you're ready!
  - If yes or you are unsure, you can verify what they are called now and then re-add them on migration day after completing the Outlook wizard (see [Instruction #7](#) and [Instruction #8](#)).

# INSTRUCTIONS (Detailing Steps From Above)

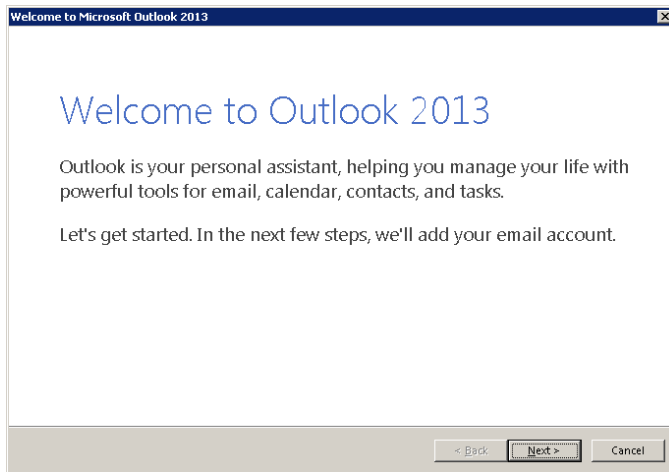
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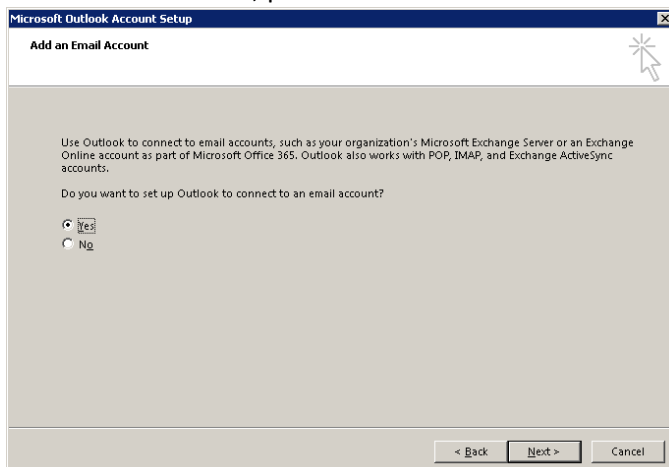
# #1 REQUIRED: How to Reconfigure Outlook on Your DSA Windows Computer

(Done ON your department's migration day)

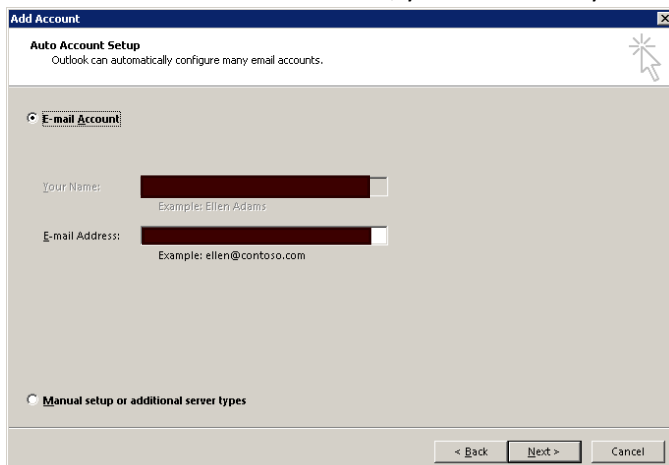
1. Log off of your DSA Windows computer and then log back on.
2. The "Welcome to Outlook 2013" wizard will start automatically; press *Next*.



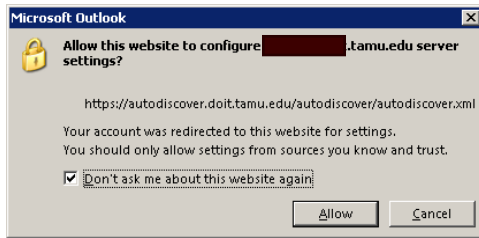
3. Leave "Yes" selected; press *Next*.



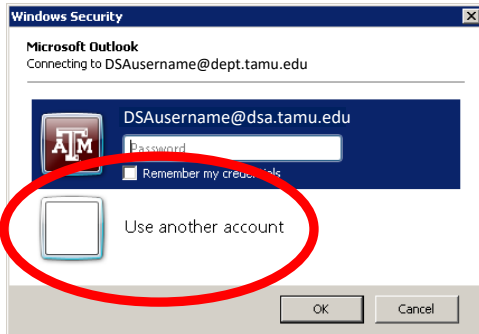
4. Leave "E-mail Account" selected, you should see your name and email address; press *Next*.



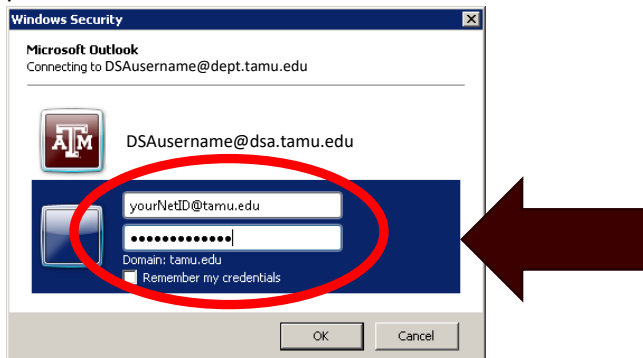
5. Select the “Don’t ask me about this website again” checkbox; press *Allow*.



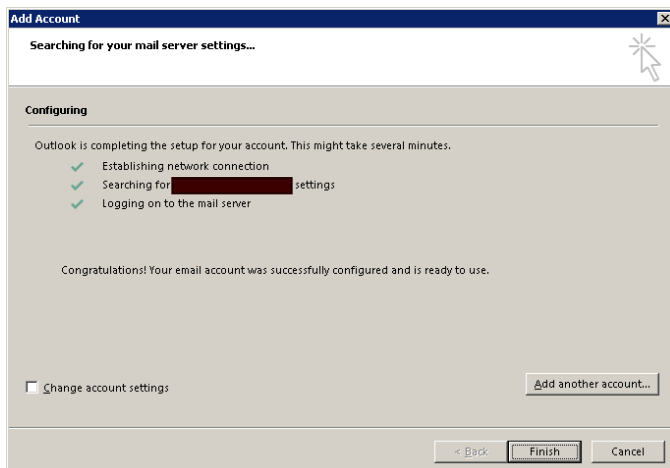
6. Select “Use another account”.



7. Enter your **TAMU NetID@tam.u.edu** and **password** (example smith@tam.u.edu), not DSA credentials; press *OK*.

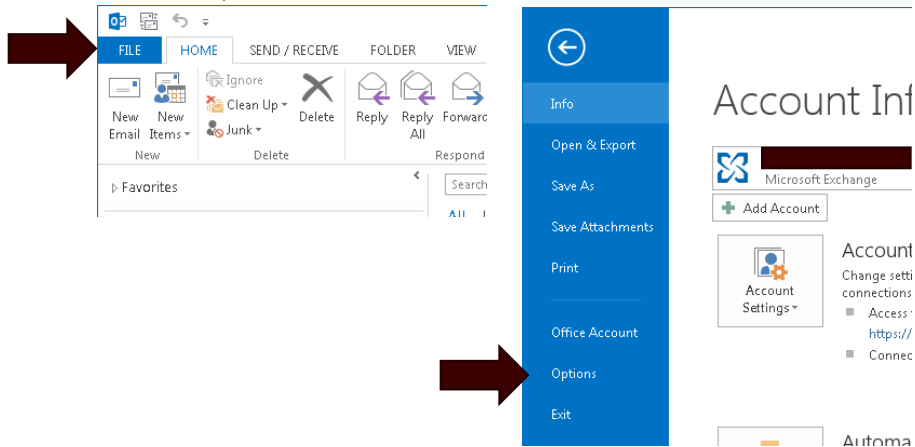


8. Press *Finish*.

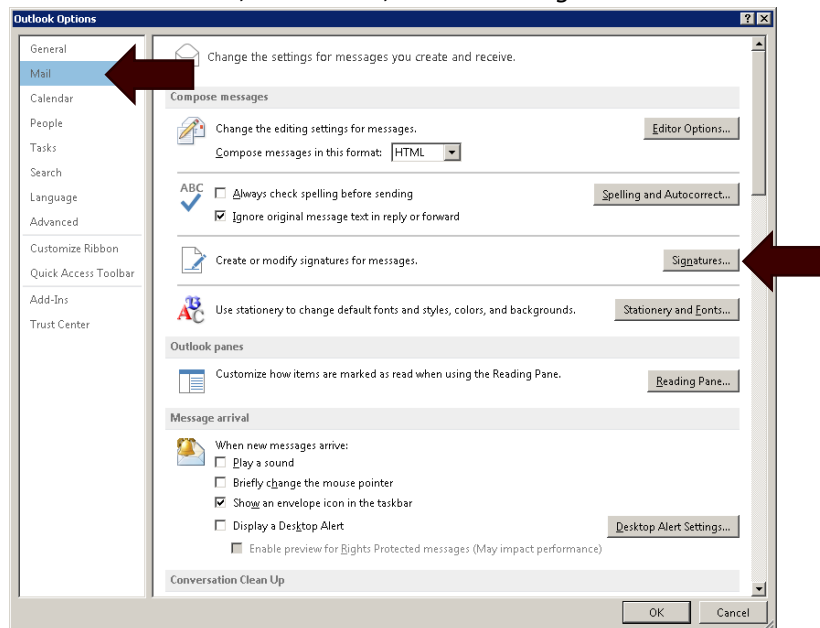


9. Open Outlook (You are now connected to the campus Exchange.)

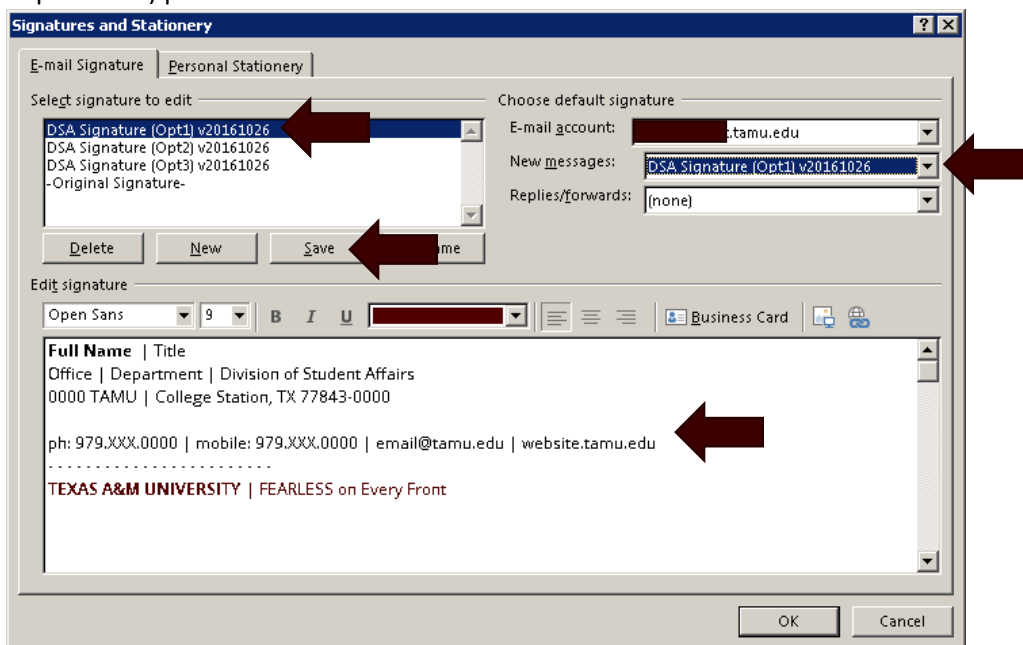
10. Select *File*, then *Options*.



11. From the left menu, select *Mail*, then select *Signatures*.



12. For “Select signature to edit”, select the new “DSA Signature (Opt#) v20161026” you (or your department) prefer.



*Note: If you do not see the new signature files, log off and then log back on to your DSA workstation.*

13. Edit the signature with your personal details; press Save.

*Notes:*

- When editing the signature, follow the DSA signature guidelines in the attached “Division of Student Affairs Email Signatures” document, also found at <http://studentaffairs.tamu.edu/communication/> under the “Email” section.
- Per [brandguide.tamu.edu](http://brandguide.tamu.edu):
  - Email from a “tamu.edu” address is considered official university correspondence.
  - Personal quotes, logos or icons are not permitted in email signatures.
  - Confidentiality statements are superfluous, as any correspondence from a tamu.edu address is subject to open record requests.
  - Limit use of university or college taglines to one and hyperlink TAMU website addresses.
- If you Delete or Rename one or more of the “DSA Signature (Opt#) v20161026” files, the original blank templates will automatically be recreated the next time you log on to your DSA workstation.

14. For “Choose default signature”, choose “DSA Signature (Opt#) v20161026” for “New messages” (required) and “Replies/forwards” (optional); press OK.

15. ***Congratulations!*** You have completed all required steps to migrate to campus Exchange.

**Remember, from now on you will always use your TAMU NetID@tamu.edu and password to login to Outlook, not your DSA username and password.**

## #2 Update Personal Device(s)

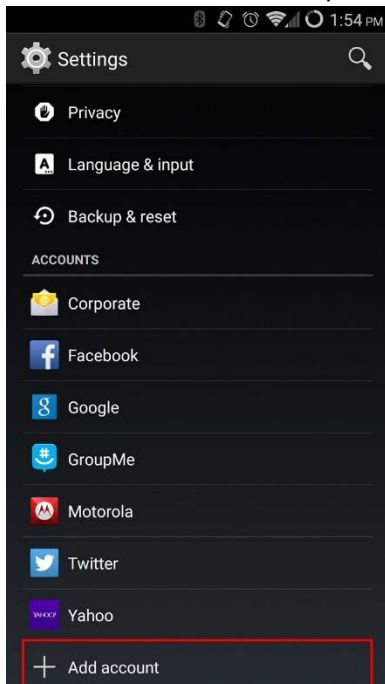
(Done ON your department's migration day)

### *TAMU Exchange Email for Android*

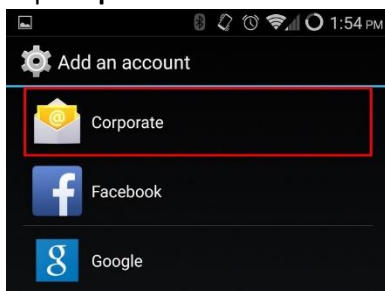
The following information is needed to set up email for Android:

- Username: *NetID@tamu.edu*
- Password: *your NetID password*
- Email address: *NetID@exchange.tamu.edu*
- Server address *exchange.tamu.edu*

1. In the **Accounts** section of your **Settings** app, tap **Add Account**.



2. Tap **Corporate** for the account type.



3. Enter *your\_NetID@exchange.tamu.edu* for the email address and *your [NetID](#) password* for the password.

**Account setup**

You can set up your account in just a few steps.

your\_netid@exchange.tamu.edu

.....

Manual setup    Next

4. Tap **Exchange**.

**Account setup**

What type of account is this?

POP3

IMAP

Exchange

5. Enter the following information and tap **Next**:

1. Username: *your\_NetID@tamu.edu*
2. Password: *Your [NetID](#) Password*
3. Server: *exchange.tamu.edu*
4. Port: *443*
5. Security Type: *SSL/TLS*
6. Client Certificate: *None*

**Account setup**

Username  
netid@tamu.edu

Password  
.....

Server  
exchange.tamu.edu

Port  
443

Security type  
SSL/TLS

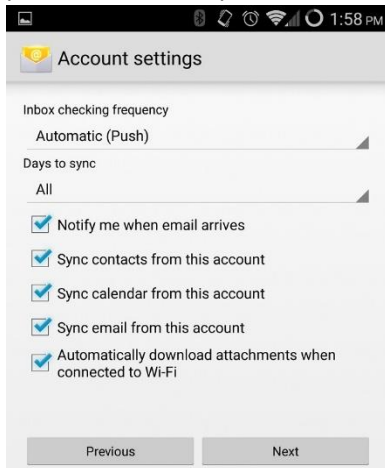
Client certificate  
None    Select

Mobile Device ID  
androidc671177889

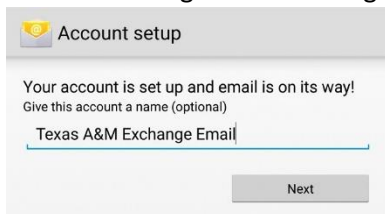
Previous    Next



6. Edit the rest of the account settings to your liking. Select the options according to your personal preference and tap **Next**.



7. Name the account within your Android device according to your personal preference and tap **Next**. Your mail should begin downloading immediately.



### *TAMU Exchange Email for iOS*

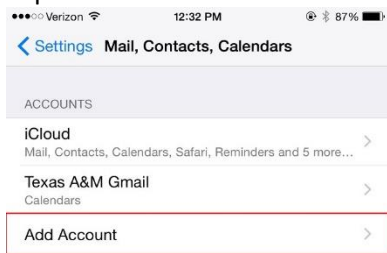
The following information is needed to set up Exchange email for iOS:

- Username: *NetID@tamu.edu*
- Password: *your NetID password*
- Email address: *NetID@exchange.tamu.edu*
- Server: *exchange.tamu.edu*

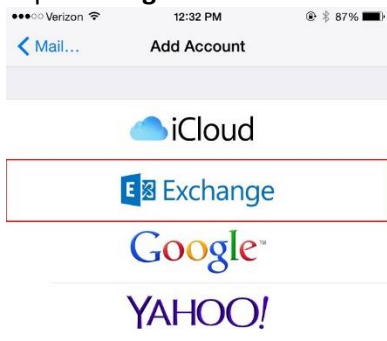
1. In the **Settings** app, scroll down and tap **Mail, Contacts, and Calendars**.



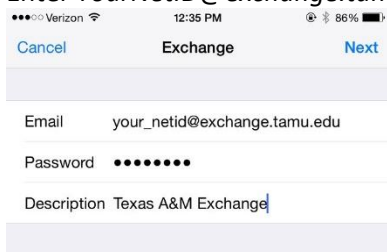
2. Tap **Add Account**.



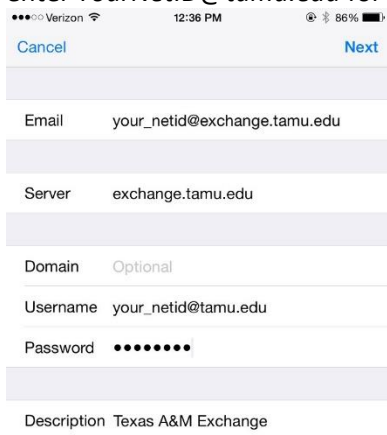
3. Tap **Exchange**.



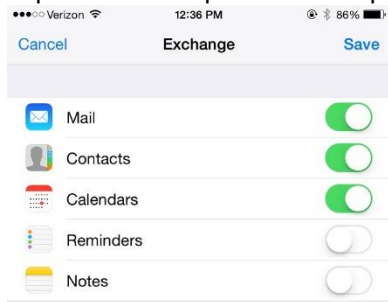
4. Enter *YourNetID@exchange.tamu.edu* and your *NetID password*, then tap **Next**.



5. You will now be asked to enter your email “Server”, “Domain”, and “Username”. Make sure to enter *YourNetID@tamu.edu* for Username and *exchange.tamu.edu* for the server. Tap **Next**.



6. You will now be asked what information you want to synchronize between your iPhone and the neo.tamu.edu email server. You can synchronize Mail (email), Contacts, Calendars, and reminders. Tap **Save** to complete the setup.



Only your inbox will automatically **push\*** to your iPhone, unless you tell it to push additional folders. To push additional folders:

1. On your iOS device, tap the **Settings** app, scroll down and tap **Mail, Contacts, and Calendars**.
2. Tap the **Texas A&M Exchange account** you set up and tap **Mail Folders to Push** near the bottom.
3. Tap the folder or folders that you want to push. Your iPhone will synchronize these folders automatically. Also, in the "Mail, Contacts, and Calendars" preference menu, under "Fetch New Data", make sure the "Push" switch is **On**.

**\*Push** is the ability to update information automatically over the air on any device or computer that has the same account. So far, Google Sync, Microsoft Exchange servers and Apple, Inc.'s iCloud service support push. Other accounts will instead fetch data at regular intervals such as every 15, 30, or 60 minutes.

### #3 Update Gateway.tamu.edu AND notify DoIT Service Desk

(Done ON your department's migration day)

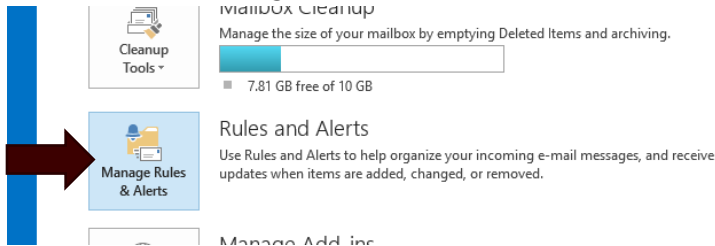
You may continue using your NetID@tamu.edu as your primary email address but AFTER the migration you must update your campus email settings and then notify DoIT.

1. Login to <http://gateway.tamu.edu> with your TAMU NetID and password.
2. Select the *Email Settings* tab.
3. Under the section "Forwarding Settings for Your Published Email Address (NetID@tamu.edu)", select the bullet for "Sent to and stored in my Texas A&M Exchange mailbox".
4. Press the *Save* button.
5. Notify the DoIT Service Desk by emailing [help@doit.tamu.edu](mailto:help@doit.tamu.edu) or by calling 979-862-7990. Specify that you have been migrated to the campus Exchange, want to continue using your [NetID@tamu.edu](mailto:NetID@tamu.edu) as your primary address, and have updated Gateway.tamu.edu.

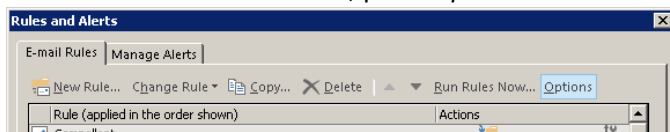
## #4 Copy Outlook Email Rules

(Start BEFORE and complete ON your department's migration day)

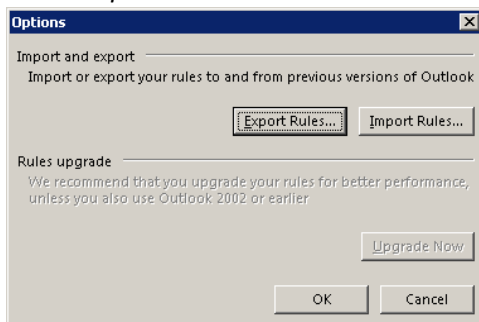
1. Open Outlook before you migrate.
2. Select *File*, then *Manage Rules & Alerts*.



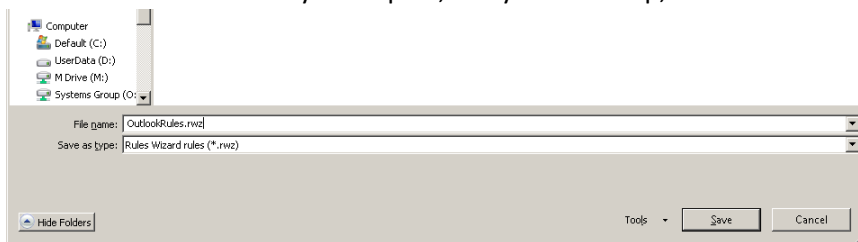
3. Under the “E-mail Rules” tab, press *Options*.



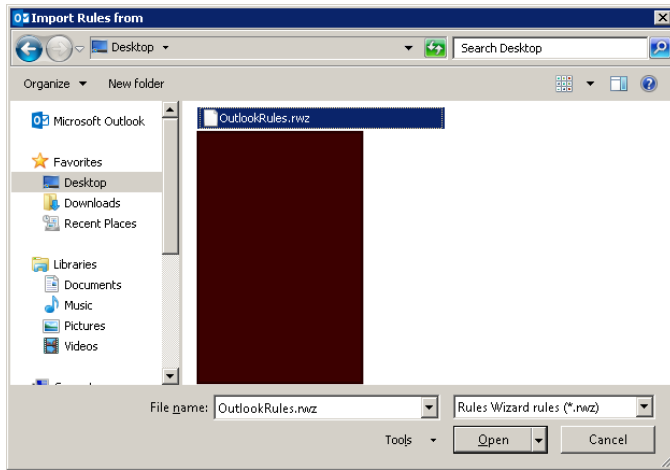
4. Select *Export Rules*.



5. Select a location to save your export, like your Desktop, name the file *OutlookRules.rwz*; press *Save*.



6. Open Outlook after you migrate
7. Select *File*, then *Manage Rules & Alerts*.
8. Under the “E-mail Rules” tab, press *Options*.
9. Select *Import Rules*.



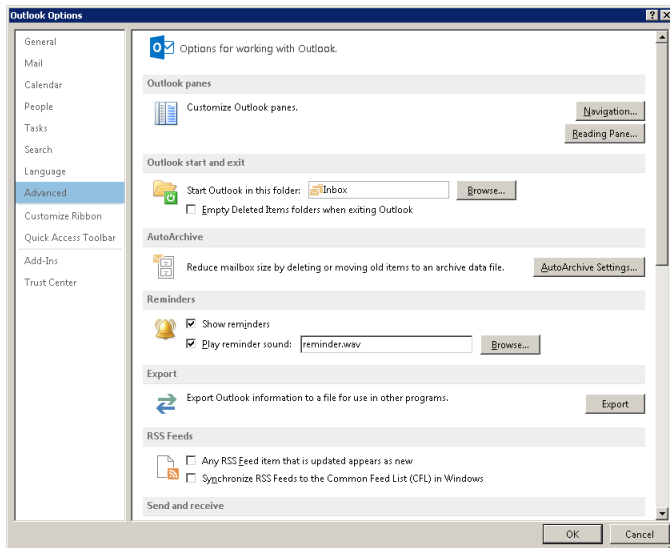
10. Select *Desktop* (or the location you saved the export), select the OutlookRules.rwz file, press *Open*.

11. Press *OK*, then *OK*.

## #5 Verify and Setup Outlook AutoArchive

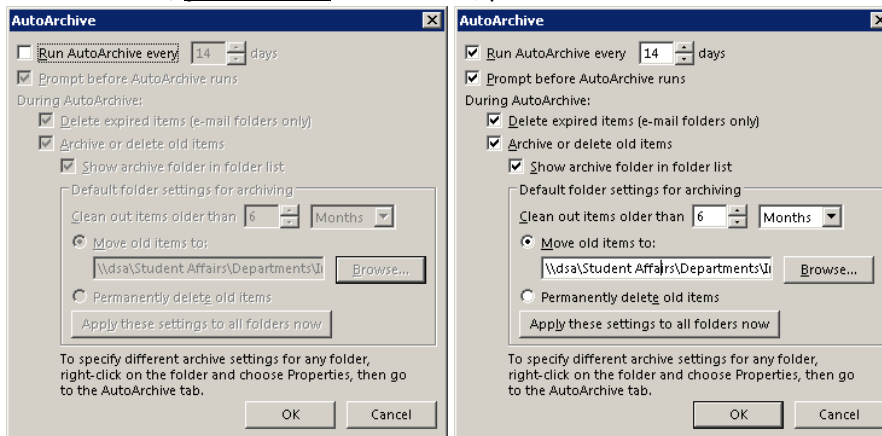
(Verify BEFORE and setup ON your department's migration day)

1. Open Outlook before you migrate.
2. Select *File*, and then *Options*.
3. Select *Advanced* from the left menu, then *AutoArchive Settings*.



By default, the checkbox “Run AutoArchive every” is un-checked.

4. **If un-checked, you're done!** If checked, press *Browse* and take note of the file location and PST name.

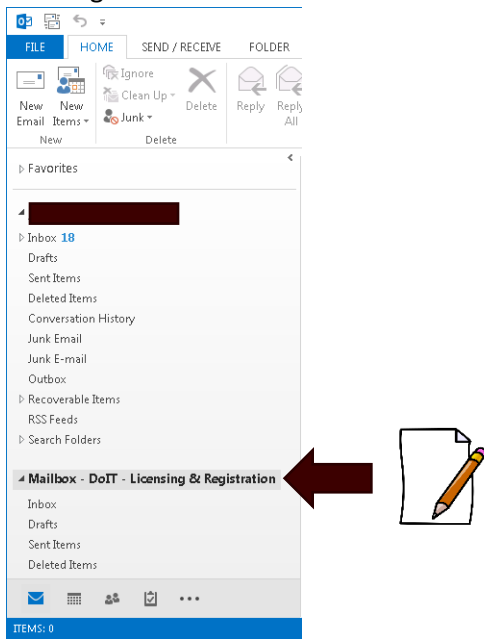


5. Open Outlook after you migrate (only if you were previously using AutoArchive).
6. Proceed to the AutoArchive settings again.
7. Click to select the “Run AutoArchive every” check box, and then type the number in the Days box to specify how frequently the AutoArchive process runs.
8. For “Move old items to:”, press *Browse*, and specify location and PST file from above.
9. Press *OK*.

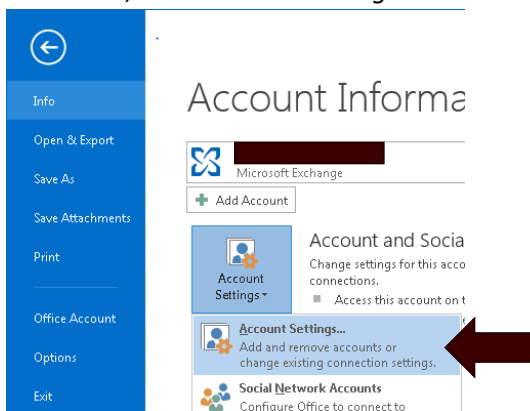
## #6 Verify and Setup Outlook Shared Mailboxes

(Verify BEFORE and setup ON your department's migration day)

1. Open Outlook before you migrate. Don't worry, if you miss one, you can still add them later.
2. Take note of any shared mailbox names below your user mailbox to make it easier to add them into Outlook after migration. Note: The mailbox names may change slightly to conform to the campus Exchange format.

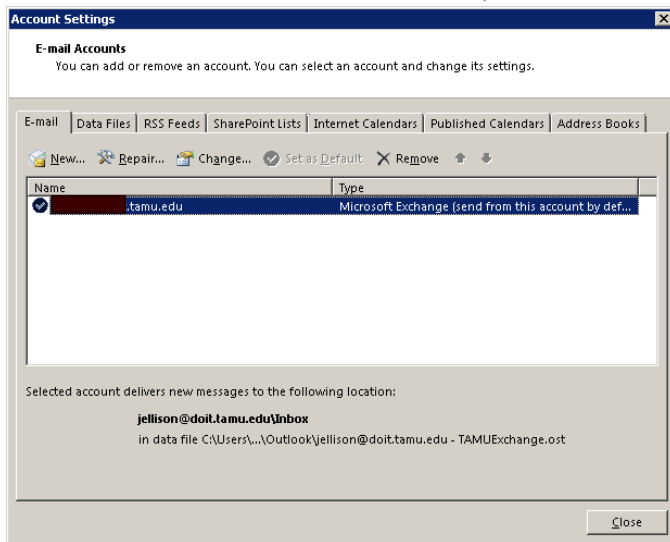


3. Open Outlook after you migrate.
4. Select *File*, then *Account Settings*.

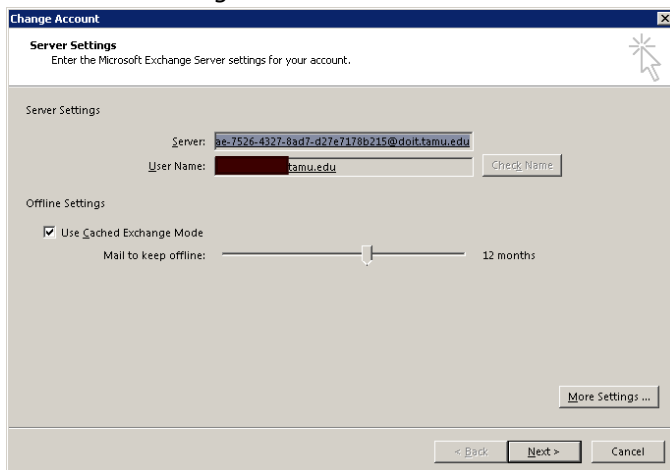




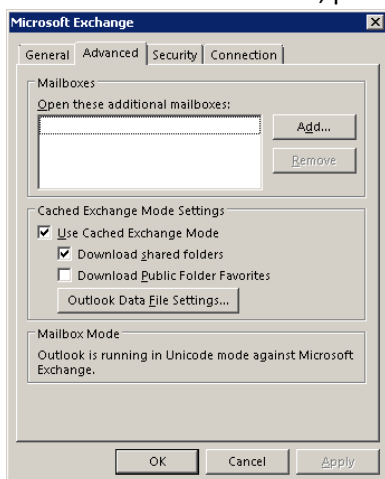
5. Under the “E-mail” tab, double-click on your email account name (DSAusername@dept.tamu.edu).



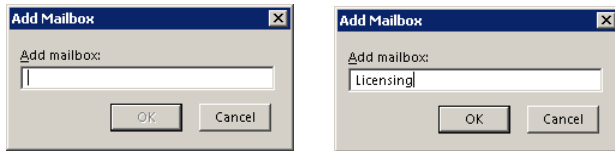
6. Press *More Settings*.



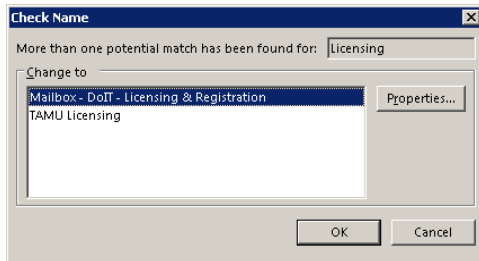
7. Select the “Advanced” tab; press *Add*.



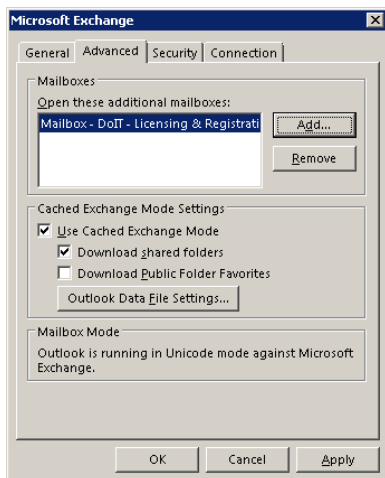
8. Type in the name of the documented shared mailboxes; press *OK*.



9. Select the desired mailbox name; press *OK*.

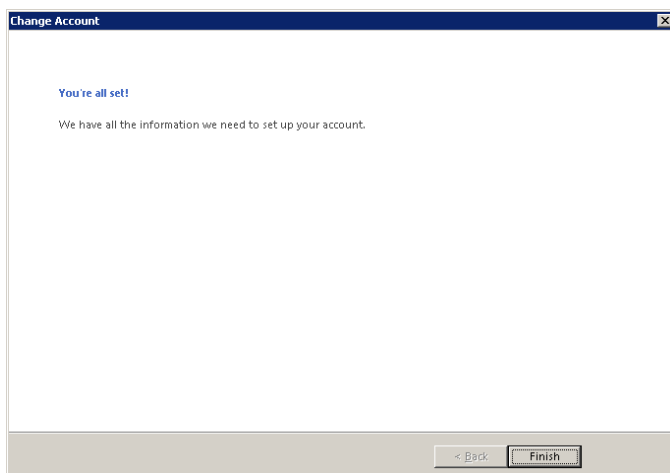


10. The desired shared mailbox will show in the list, add more as needed, or press *OK*.



11. Press *Next*

12. Press *Finish*

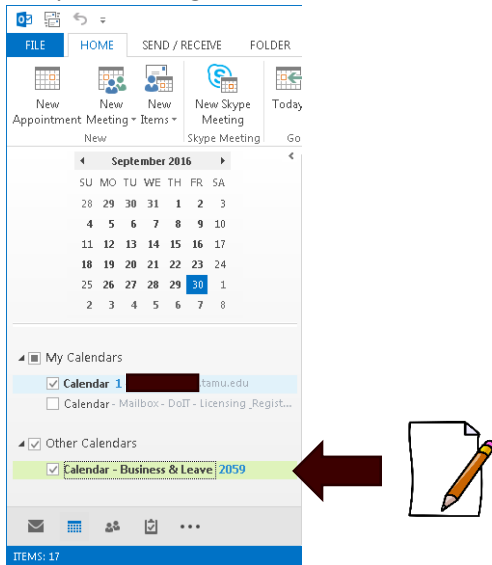


Note: The shared mailbox(es) will appear below your user mailbox in Outlook as before.

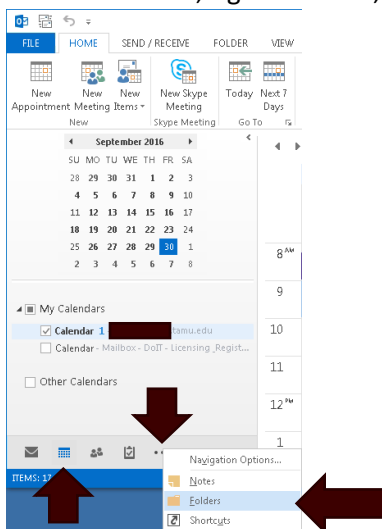
## #7 Verify and Setup Outlook Shared Calendars

(Verify BEFORE and setup ON your department's migration day)

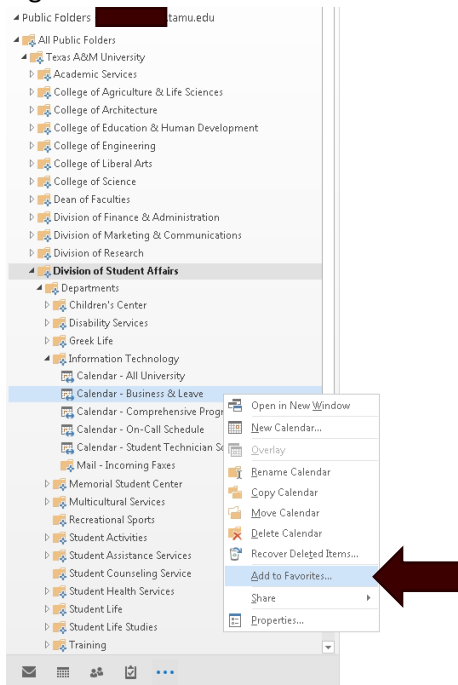
1. Open Outlook before you migrate. Don't worry, if you miss one, you can still add them later.
2. Take note of any shared calendar name(s) below your user calendar to make it easier to add them into Outlook after migration. Note: The shared calendar names may change slightly to conform to the campus Exchange format.



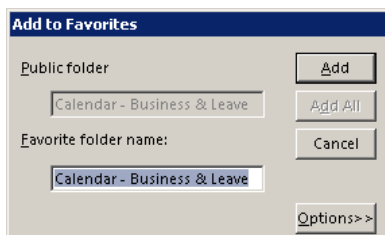
3. Open Outlook after you migrate.
4. Go to Calendars, right-click **...**, select **Folders**.



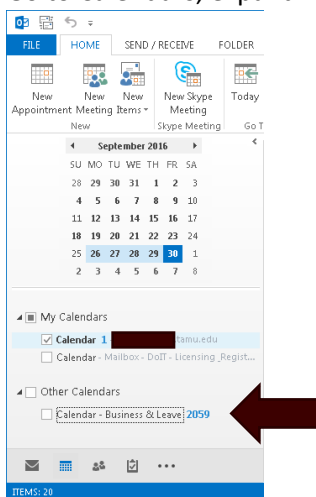
5. *Public Folders* will appear in your left menu area.
6. Expand *All Public Folders > Texas A&M University > Division of Student Affairs > Your Department Name*.
7. Right-click the desired shared calendar name, select *Add to Favorites*.



8. Press *Add*.



9. Go to *Calendars*, expand “Other Calendars” to see the shared calendar(s); check box(es) to view.



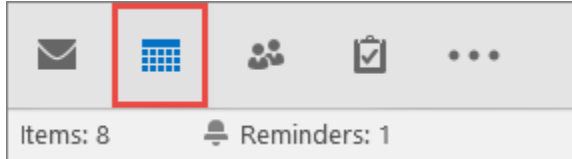
## #8 Share your Outlook Calendar with Others (& Change Permissions)

(Setup ON your department's migration day)

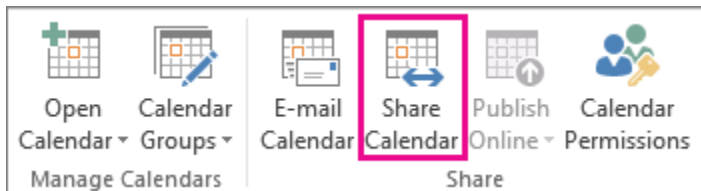
If you want to share your calendar with someone you can give them permissions to view your calendar.

### Share your calendar with people inside your organization

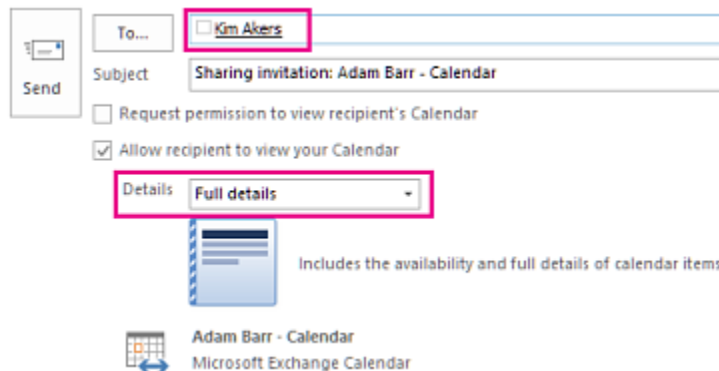
1. Click Calendar (may be the calendar icon or the word "Calendar").



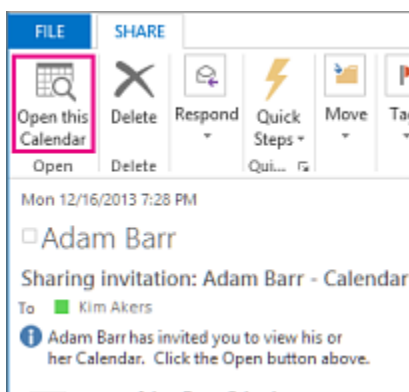
2. Click Home > Share Calendar.



3. In the email that opens, type the name of the person (or group) in your organization that you want to share your calendar with in the **To** box. In Details, specify the level of details that you want to share with the person in your organization, and then click Send.



4. The person in your organization receives the sharing invitation in email, and then clicks "Open this Calendar".

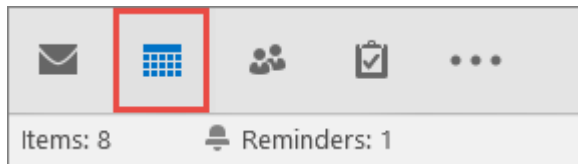


The shared calendar displays in the person's Calendar list.

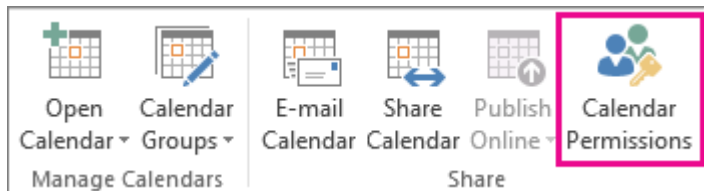
## Change permissions if desired after you have shared your calendar with other people

You can change calendar sharing permissions.

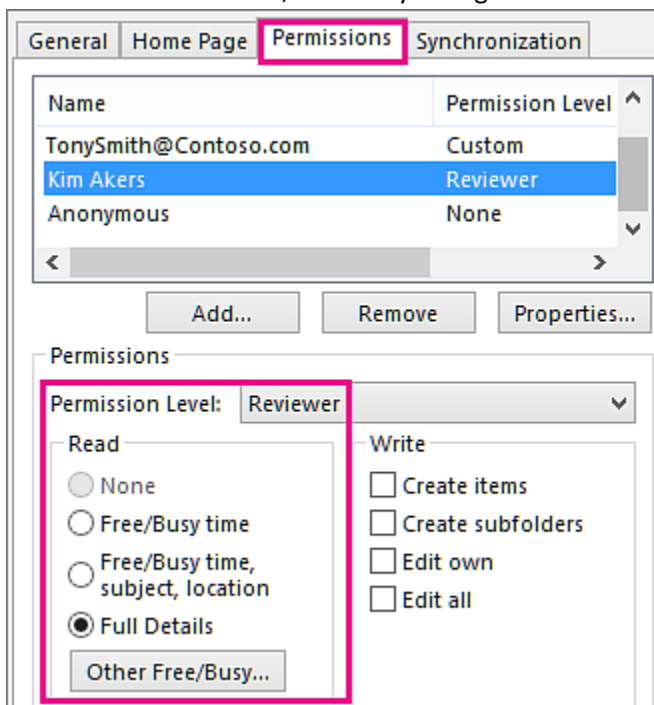
1. Click Calendar (may be the calendar icon or the word "Calendar").



2. Click Home > Calendar Permissions.



3. On the Permissions tab, make any changes to the calendar sharing permissions.

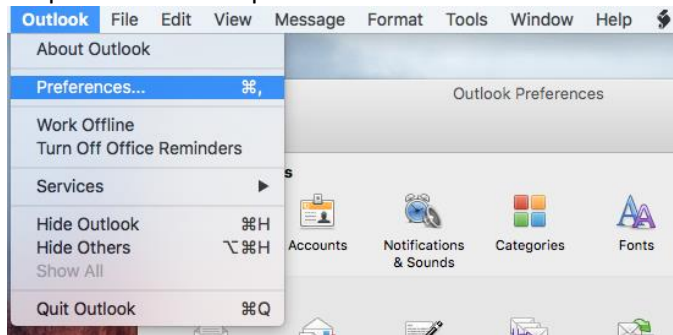


4. Click OK.

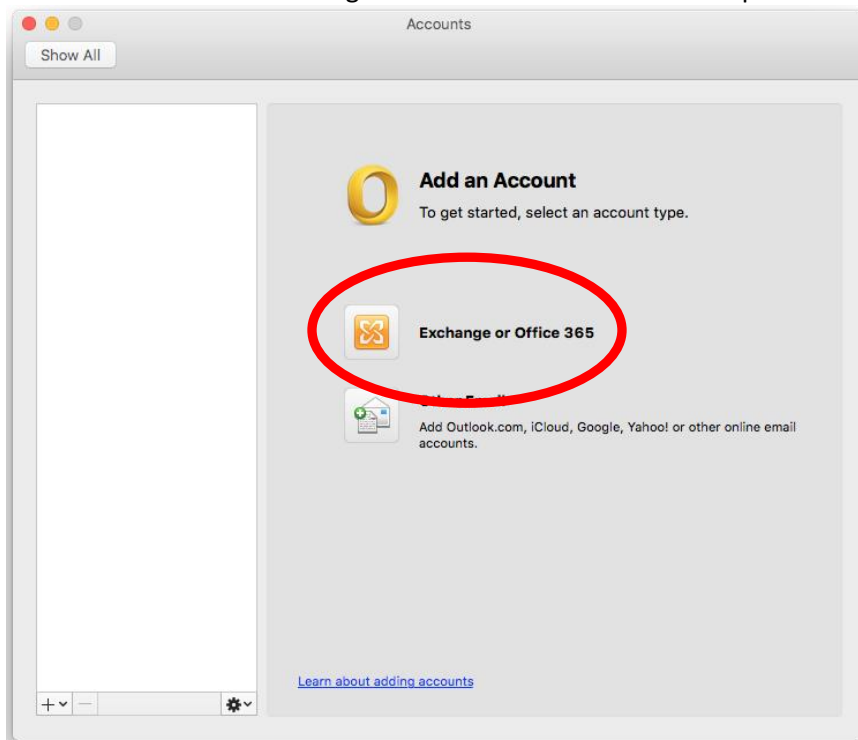
## #9 How to Configure Outlook on Your Mac Computer

(Done ON your department's migration day)

1. Launch Microsoft Outlook from the Application folder.
2. If it is the first time to run the Mac Outlook, follow step 4 to add a new email account.
3. Click Outlook on the top toolbar, then Preference. On the Outlook Preferences pane, click on Accounts to open the Account pane.



4. Click the icon next to Exchange or Office 365 on the Accounts pane to add an email account.



5. Enter your Exchange account information.
  - a. For the email address, use your NetID@exchange.tamu.edu
  - b. For the Authentication Method, select "User Name and Password" from the dropdown.
  - c. For User Name, use your NetID@tamu.edu.
  - d. For the password field, enter your NetID password.
  - e. Select Configure automatically.
  - f. Click the Add Account button.

**Accounts**

**Enter your Exchange account information.**

E-mail address: NetID@exchange.tamu.edu

**Authentication**

Method: User Name and Password

User name: NetID@tamu.edu

Password: .....

☒ Configure automatically

Cancel Add Account

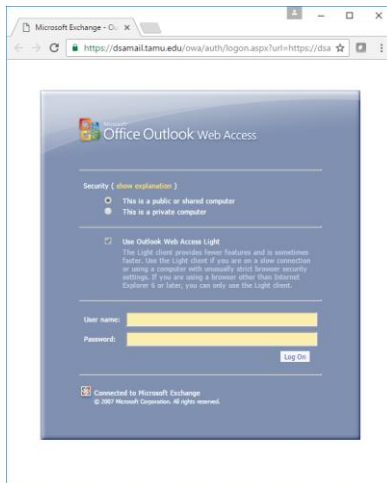
Add Outlook.com, iCloud, Google, Yahoo! or other accounts.



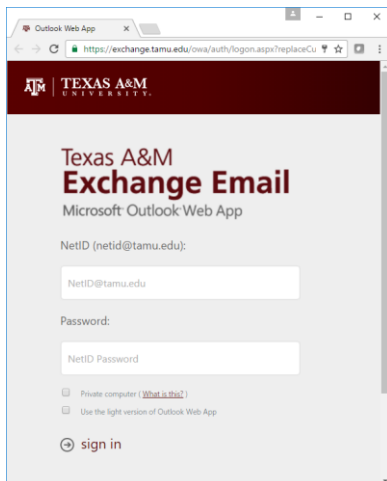
## #10 Use Outlook Web Access/App (OWA) Website to Check Email

Email can be accessed online through a web browser (like Internet Explorer, Chrome, Firefox) by going to Outlook Web Access/App (OWA).

Before your migration day, go to DSA OWA – <http://dsamail.tamu.edu>; login using your DSA credentials.



After your migration day, go to TAMU OWA – <http://exchange.tamu.edu>; login using your NetID credentials.



As of October 14, 2016, TAMU IT enabled DUO two-factor authentication on TAMU IT Exchange (OWA only).

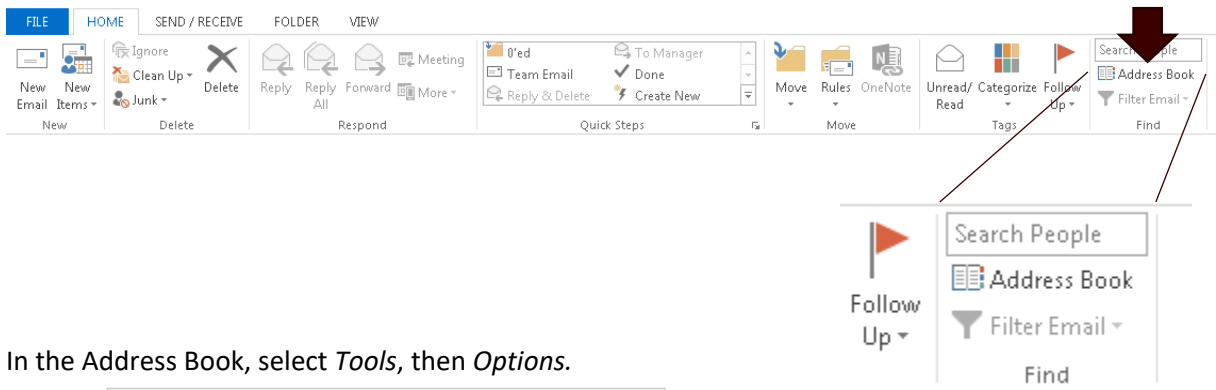
If you are currently enrolled in DUO, you will be prompted to use your Duo-enrolled device along with your NetID and password when you log into [exchange.tamu.edu](http://exchange.tamu.edu). This change will not affect desktop mail clients such as Outlook.

**Note:** If you use web browser Bookmarks/Favorites, make sure you create a new one for TAMU OWA.

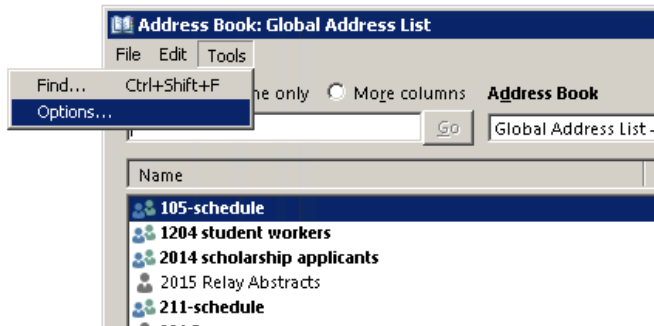
## #11 Set Outlook Address Book Default View

Campus Exchange now gives DSA users access to all TAMU contacts in the Outlook global address book. If you prefer, you may set the default view in Outlook to start with DSA or your department.

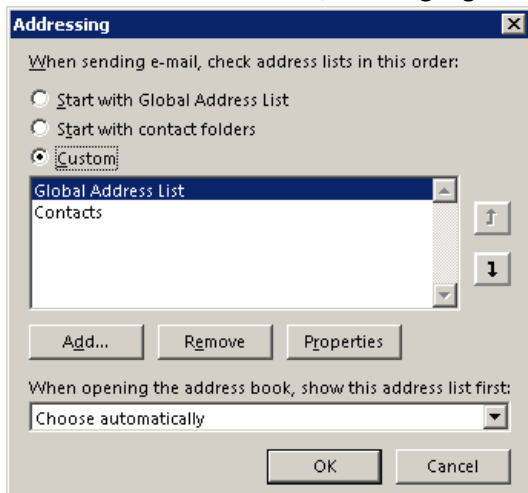
1. Open Outlook after you migrate.
2. On the *Home* tab, select the *Address Book* button.



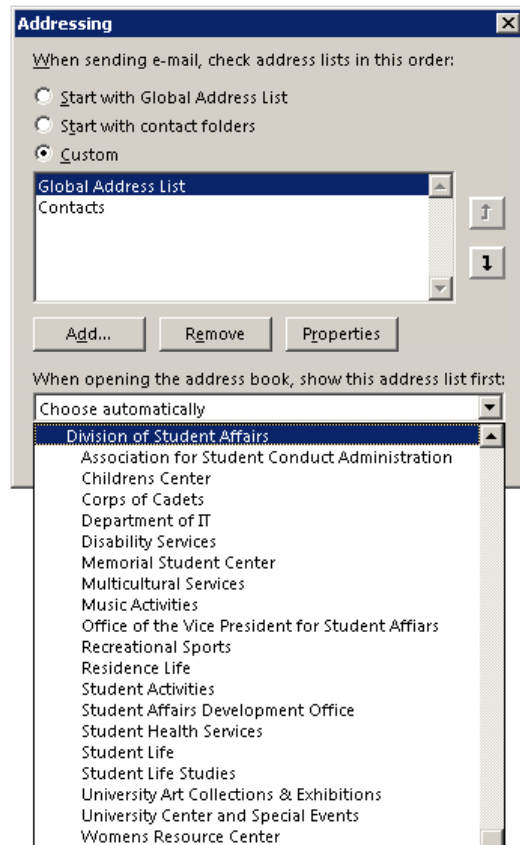
3. In the Address Book, select *Tools*, then *Options*.



4. Select the "Custom" bullet, then highlight "Global Address List".



5. From the “When opening the address book, show this address list first:” dropdown, select the desired default address book level such as “Division of Student Affairs” or your department.



6. Press OK.

