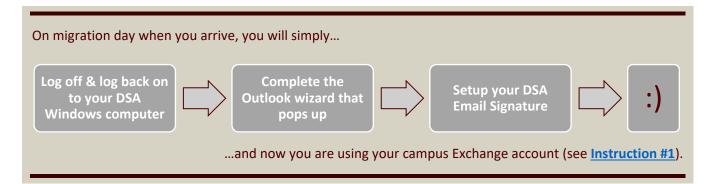
DSA Email Migration v20161114



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.



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!
- o 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, <u>you're ready</u>!
- 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).

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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.

licrosoft Outlook Account Setup	×
Add an Email Account	1 Alexandre
Use Outlook to connect to email accounts, such as your organization's M Online account as part of Microsoft Office 365. Outlook also works with F accounts. Do you want to set up Outlook to connect to an email account?	icrosoft Exchange Server or an Exchange OOP, IMAP, and Exchange ActiveSync
C Ng	
	< Back Next > Cancel

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

Add Account 🛛 🗙				
Auto Account Setup Outlook can automatically configure many email accounts.		× ×		
C E-mail Account				
Your Name: Example: Ellen Adams				
E-mail Address: Example: ellen@contoso.com				
C Manual setup or additional server types				
	≺ <u>B</u> ack <u>N</u> ext ≻	Cancel		

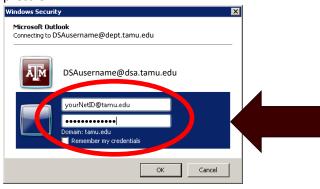
5. Select the "Don't ask me about this website again" checkbox; press Allow.



6. Select "Use another account".



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



8. Press Finish.

Add Account	×
Searching for your mail server settings	×
Configuring	
Outlook is completing the setup for your account. This might take several minutes.	
Congratulations! Your email account was successfully configured and is ready to use.	
☐ <u>C</u> hange account settings	Add another account
< <u>Back</u>	(Finish Cancel

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

10. Select File, then Options.

📴 🖺 🕤	Ŧ				
FILE	SEND / RECEIVE	FOLDER VIEW	¢		
New New	ि Ignore ≧ Clean Up - Delete	Reply Reply Forward	Info	Account	Inf
Email Items = New	&o Junk → Delete	All Respond	Open & Export	5/1	
▷ Favorites		< Search	Save As	Microsoft Exchang	e
		AII 1	Save Attachments	+ Add Account	
			Print	Char	ount ge setti ections
			Office Account		Access · https://
			Options	-	Connec
			Exit		
				- Au	toma

_

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

tlook Options	<u>**</u>
General Mail	Change the settings for messages you create and receive.
Calendar	Compose messages
People	Change the editing settings for messages.
Tasks	Compose messages in this format: HTML ▼
Search	
Language	ABC 🗖 Always check spelling before sending
Advanced	Ignore original message text in reply or forward
Customize Ribbon	Create or modify signatures for messages.
Quick Access Toolbar	
Add-Ins	Use stationery to change default fonts and styles, colors, and backgrounds. Stationery and Eonts
Trust Center	AC Sestements of a service of the se
	Outlook panes
	Customize how items are marked as read when using the Reading Pane.
	Message arrival
	When new messages arrive:
	Play a sound
	☐ Briefly c <u>h</u> ange the mouse pointer ✔ Sho <u>w</u> an envelope icon in the taskbar
	Show an envelope icon in the taskbar Display a Desktop Alert Desktop Alert Settings
	Enable preview for Bights Protected messages (May impact performance)
	Conversation Clean Up
	OK Cancel
	OK Cancel

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

		-
atures and Stationery	? ×	
mail Signature Personal Stationery		
5 [<u>7</u>	1	
ele <u>c</u> t signature to edit	Choose default signature	
DSA Signature (Opt1) v20161026	E-mail account:	
DSA Signature (Opt2) v20161026 DSA Signature (Opt3) v20161026	New messages: DSA Signature (Opt1) v20161026	
-Original Signature-		N
T	Replies/forwards: (none)	
Delete New Save		
lit signature		
Open Sans 💌 9 💌 B I 🛄	🔳 📃 🚍 📃 👪 <u>B</u> usiness Card 🛛 🔒 🏀	
Full Name Title		
Office Department Division of Student Affairs		
0000 TAMU College Station, TX 77843-0000		
ph: 979.XXX.0000 mobile: 979.XXX.0000 email@tamu.e	du website.tamu.edu	
TEXAS A&M UNIVERSITY FEARLESS on Every Front		
	-1	
	OK Cancel	

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:
 - 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 <u>required</u> steps to migrate to campus Exchange.

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

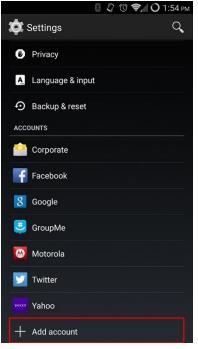
#2 Update Personal Device(s)

(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 <u>NetID</u> password* for the password.

Account setup	
You can set up your ac steps.	count in just a few
your_netid@exchange.t	amu.edu
······	
	Next

4. Tap Exchange.

		🕅 📚 📶 🛈 1:57 рм
Account s	setup	
What type of acc	count is this?	
	POP3	
	IMAP	
[Exchange	

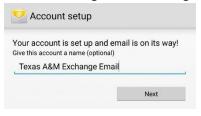
- 5. Enter the following information and tap **Next**:
 - 1. Username: your_NetID@tamu.edu
 - 2. Password: Your <u>NetID</u> Password
 - 3. Server: exchange.tamu.edu
 - 4. Port: 443
 - 5. Security Type: SSL/TLS
 - 6. Client Certificate: None

Ð	🖓 🕲 📚 🖉 🛈 1:58 p
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.

•••• Ve	rizon 🗢 12:31 PM	۰ 🕸 87% 페)
	Settings	
\bigcirc	iTunes & App Store	>
	Mail, Contacts, Calendars	>
	Notes	>
!	Reminders	>
	Phone	>
	Messages	>

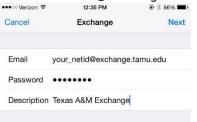
2. Tap Add Account.

•	•••• Verizon 🗢	12:32 PM	۰ 🕸 🕸 🕐
	Settings Mail	, Contacts, Calend	Jars
	ACCOUNTS		
	iCloud Mail, Contacts, Cale	endars, Safari, Reminde	rs and 5 more >
	Texas A&M Gm Calendars	ail	>
	Add Account		>

3. Tap Exchange.

•••• Verizon 🗢	12:32 PM	، 87% 🛋 🛞
🗙 Mail	Add Account	
	iCloud	
I	E 🛛 Exchange	9
	Google	
	YAHOO!	

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.

Cancel	Next
Email	your_netid@exchange.tamu.edu
Server	exchange.tamu.edu
Domain	Optional
Username	your_netid@tamu.edu
Password	•••••
Description	Texas A&M Exchange

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.

 Veriz 	ion 🗢	12:36 PM	۰ 🕸 86% 🔳
ancel		Exchange	Save
I	Vlail		
	Contacts		
• •	Calendars		
i i	Reminders		\bigcirc
— 1	Votes		\bigcirc

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 <u>help@doit.tamu.edu</u> or by calling 979-862-7990. Specify that you have been migrated to the campus Exchange, want to continue using your <u>NetID@tamu.edu</u> 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 Oulook before you migrate.
- 2. Select File, then Manage Rules & Alerts.



3. Under the "E-mail Rules" tab, press Options.

Rules and Alerts	×
E-mail Rules Manage Alerts	
💼 New Rule Change Rule 🕶 🕒 Copy 🗙 Delete 🔺	💌 <u>R</u> un Rules Now Options
Rule (applied in the order shown)	Actions
	V= 19

4. Select Export Rules.



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



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

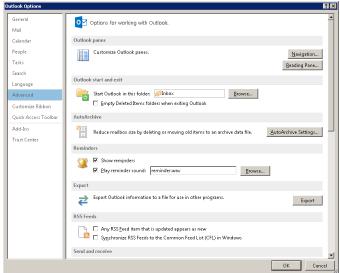
Import Rules from						2
🧿 🗇 💻 Desktop 👻		- 🐼	Search Desktop			۶
Organize 🔻 New folder					- 🔟	?
Microsoft Outlook ✓ Favorites Desktop Downloads Recent Places	tlookRules,rwz					
Libraries						
Pictures Videos						
File <u>n</u> ame: Out	tlookRules.nwz	-	Rules Wizard rul	es (*.n	vz)	•
		Tools 🗸	<u>O</u> pen 👻		Cancel	1

- 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

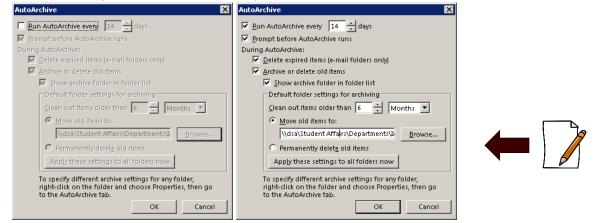
(Verify BEFORE and setup ON your department's migration day)

- 1. Open Oulook <u>before</u> 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.

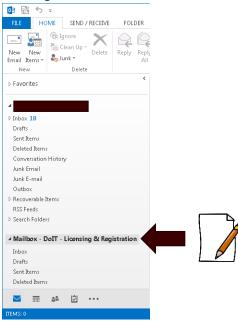


- 5. Open Oulook after you migrate (only if you were previously using AutoArchive).
- 6. Proceed to the AutoArchive settings again.
- 7. Click to select the "Run AutoArchive every" check box, and then type the number in the Days box to specify how frequently the AutoArchive process runs.
- 8. For "Move 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 Oulook <u>after</u> 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).

Account Settings 🛛 🗙
E-mail Accounts You can add or remove an account. You can select an account and change its settings.
E-mail Data Files RSS Feeds SharePoint Lists Internet Calendars Published Calendars Address Books
Name Type
Microsoft Exchange (send from this account by def
Selected account delivers new messages to the following location:
jellison@doit.tamu.edu\Inbox
in data file CAUsers\AOutlook\jellison@doit.tamu.edu - TAMUExchange.ost

6. Press More Settings.

Change Account		X
Server Settings Enter the Microsoft Exchange Ser	ver settings for your account.	×
Server Settings		
<u>S</u> erver:	ae-7526-4327-8ad7-d27e7178b215@doit.tamu.edu	
<u>U</u> ser Name:	tamu.edu	Chec <u>k</u> Name
Offline Settings		
🔽 Use <u>C</u> ached Exchange Mode		
Mail to keep offline:	·	12 months
		More Settings
	< <u>B</u>	eck <u>N</u> ext > Cancel

7. Select the "Advanced" tab; press Add.

1icrosoft Exchange 🛛 🗙
General Advanced Security Connection
Mailboxes
Open these additional mailboxes:
A <u>d</u> d
<u>R</u> emove
Cached Exchange Mode Settings
✓ Use Cached Exchange Mode
Download shared folders
Download Public Folder Favorites
Outlook Data <u>F</u> ile Settings
Mailbox Mode
Outlook is running in Unicode mode against Microsoft Exchange.
OK Cancel Anniv
OK Cancel <u>Apply</u>

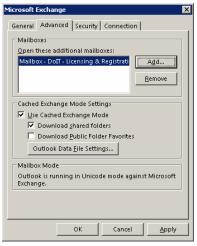
8. Type in the name of the documented shared mailboxes; press OK.

Add Mailbox 🗙	Add Mailbox 🗙
Add mailbox:	Add mailbox: Licensing
OK Cancel	OK Cancel

9. Select the desired mailbox name; press OK.

More than one potential match has been found for: Licensing Change to Mailbox - DoIT - Licensing & Registration TAMU Licensing	Check Name		×
Mailbox - DoIT - Licensing & Registration Properties	More than one potential match has been found for:	Licensi	ng
	Change to		
TAMU Licensing			Properties
	TAMU Licensing		
OK Cancel		ок	Cancel

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



- 11. Press Next
- 12. Press Finish

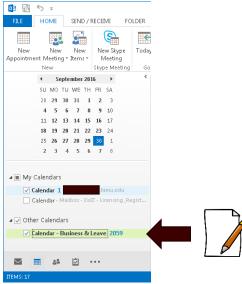
Change Account	×
You're all set!	
We have all the information we need to set up your account.	
< Back Finish	

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

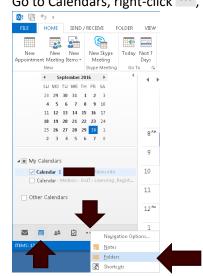
#7 Verify and Setup Outlook Shared Calendars

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

- 1. Open Outlook <u>before</u> 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.

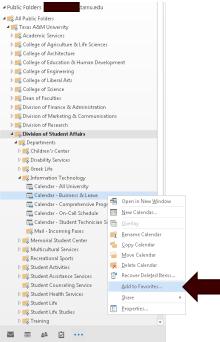


3. Open Outlook <u>after</u> you migrate.



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.

Add to Favorites	
<u>P</u> ublic folder	Add
Calendar - Business & Leave	A <u>d</u> d All
Farranika da lalan manazar	
<u>F</u> avorite folder name:	Cancel
Calendar - Business & Leave	
	<u>O</u> ptions>>

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

0 2	5	Ŧ						
FILE	но	ME		SENI	D/	RECE	IVE F	OLDER
New Appointme		New eetir		New ems			Skype	Today
	Nev	w.				Skype	Meeting	Go 1
	4	St	epte	mber	20	16	•	<
	SU	мо	TU	WE	ΤH	FR	SA	
	28	29	30	31	1	2	3	
	4	5	6	7	8	9	10	
	11				15		17	
	18		20			_		
	25 2	26	27	28	29		1	
	2	2	4	э	0		0	
	alenc	lar 1		box-	Do		amu.edu censing _	Regist
⊿ _ Othe				ness	81	leave	2059	
				ness	81		2059	

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

(Setup ON your department's migration day)

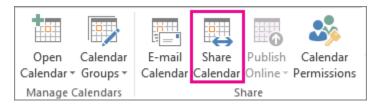
If you want to share your calendar with someone you can give them permissions to view your calendar.

Share your calendar with people inside your organization

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



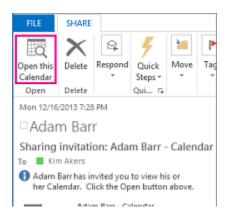
2. Click Home > Share Calendar.



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.

۹ Send		Sharing invitation: Adam Barr - Calendar permission to view recipient's Calendar ipient to view your Calendar	-
	Details	Full details +	
		Includes the availability and full details of calendar items	i
		Adam Barr - Calendar Microsoft Exchange Calendar	

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.

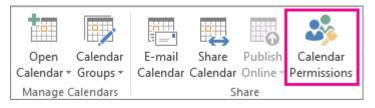
Change permissions if desired after you have shared your calendar with other people

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.

General	Home Page	Permiss	ions	Synchro	onization	
Name				Perm	nission Lev	el ^
TonySm	ith@Contos	o.com		Cust	om	
Kim Ak	ers			Revi	ewer	
Anonyr	nous			Non	e	~
<						>
	Add		Remo	ove	Properti	es
Permis	sions					
Permise	sion Level: F	Reviewer				~
Read			– Wri	te		
O N	one			Create it	ems	
OFr	ee/Busy time			Create su	ubfolders	
	ee/Busy time,			Edit own	ı	
∪ su	ibject, locatio	n		Edit all		
🛛 🔘 FL	III Details					
	in becans					

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.

0	Accounts
Show All	
	Add an Account To get started, select an account type.
	Exchange or Office 365
	Add Outlook.com, iCloud, Google, Yahoo! or other online email accounts.
+~ - 4	Learn about adding accounts

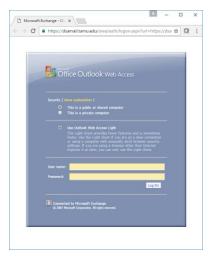
- 5. Enter your Exchange account information.
 - a. For the email address, use your NetID@exchange.tamu.edu
 - b. For the Authentication Method, select "User Name and Password" from the dropdown.
 - c. For User Name, use your NetID@tamu.edu.
 - d. For the password field, enter your NetID password.
 -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

	Accounts
Enter your Exchan	ge 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 accounts.

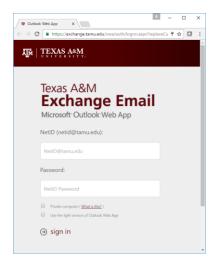
#10 Use Outlook Web Access/App (OWA) Website to Check Email

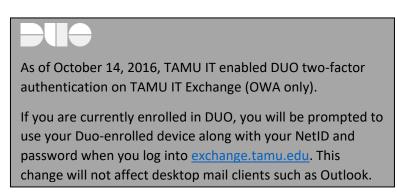
Email can be accessed online through a web browser (like Internet Explorer, Chrome, Firefox) by going to Outlook Web Access/App (OWA).

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



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



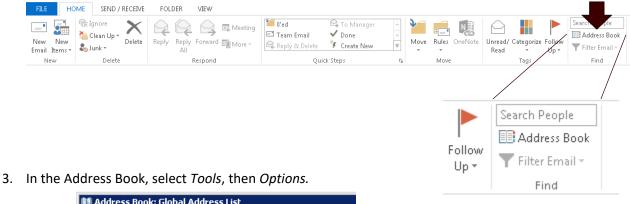


Note: If you use web browser Bookmarks/Favorites, make sure you create a new one for TAMU OWA.

#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 Oulook after you migrate.
- 2. On the Home tab, select the Address Book button.



- Image: Address Book: Global Address List

 File
 Edit

 Tools

 Find...
 Ctrl+Shift+F

 Options...
 Global Address Book

 Global Address List

 Image: Internet and the only
 Global Address

 Image: Inte
- 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.

