



Outlook 365 Conversion Training

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Conversion Timeline & Instructions

August 14th-18th: Training and New Account Setup

- Attend a training session and follow steps to [Creating a New E-mail Account for Office 365](#). Continue to use your **old** inbox until the go-live date.

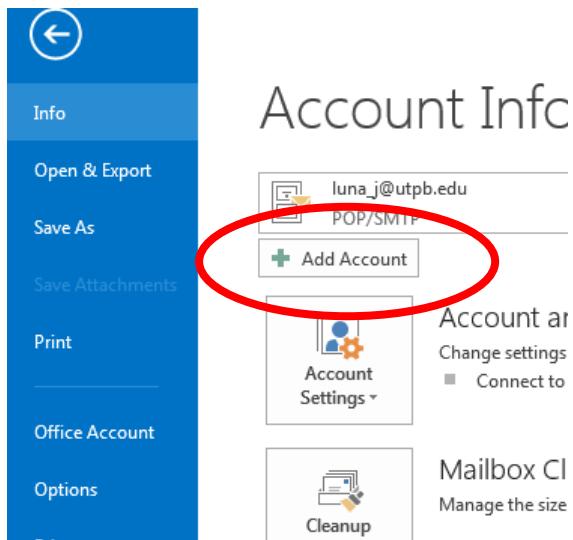
August 19th: Go-live date for Office 365

- Begin using **new** inbox by changing the new inbox to the default inbox (pg. 5) and follow steps to [Export Old Account to File](#) and [Import Old Account File to New Account](#). Following both steps should move any e-mails, contacts, calendar appointments, tasks, or notes that you have in your old Outlook account to your new Outlook account. If you have created rules in your old account, you might have to re-create them in your new account.
- If you wish to use a mobile device to access your UTPB e-mail, follow the steps for your specific device type: [Configuring Outlook 365 for iPhone/iPad/iPod Touch](#) or [Configuring Outlook 365 for Android](#) or [Configuring Outlook 365 for Windows Phone](#).
- If you need to use the Outlook Web Interface, follow the steps for [Accessing Outlook Web Interface](#).

Please note, it is recommended that you follow the steps to [Creating a New E-mail Account for Office 365](#) **prior to the go-live date so you will have less to do to get it set up that day. Also, please wait until the go-live date to [Export Old Account to File](#) and [Import Old Account to New Account](#). If you do so beforehand, you will not capture the most recent information from your old account and you might lose data in the process.

Creating a New E-mail Account for Office 365

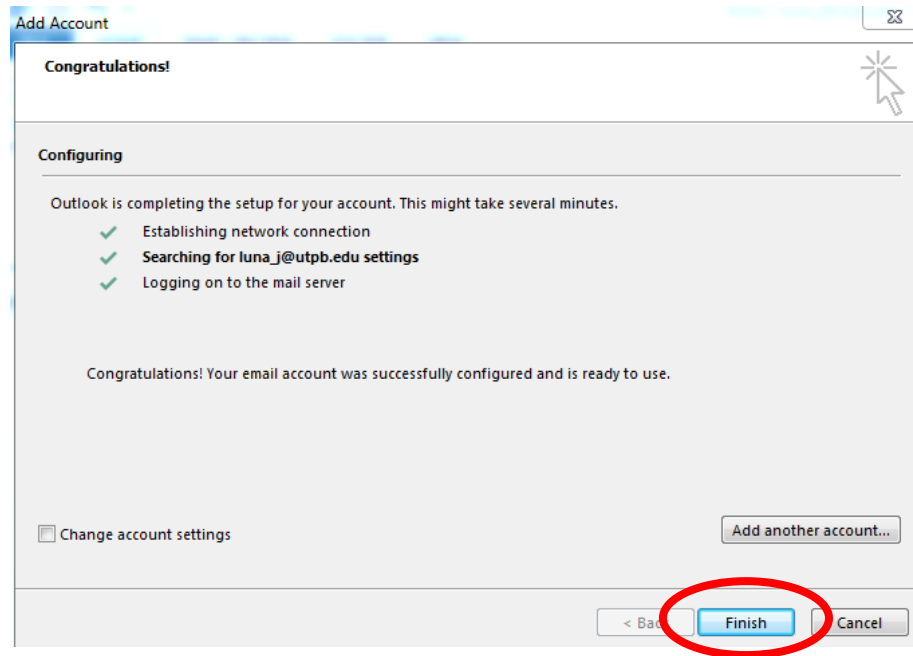
1. Open Outlook and select File, then click Add Account



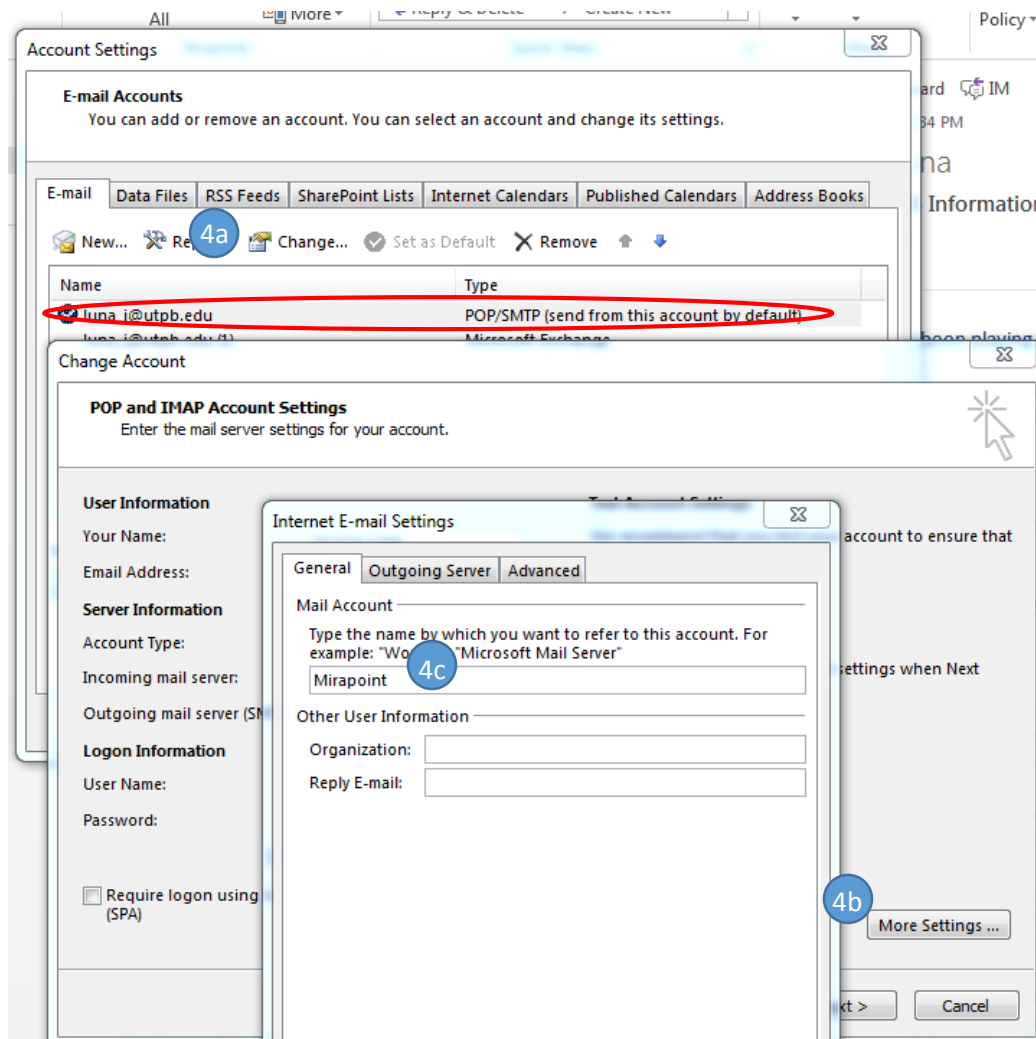
2. In the following screen, the option will default to Email Account. You will then enter in all of your information and click Next.

A screenshot of the 'Add Account' dialog box in Outlook. The title bar says 'Add Account'. The main section is 'Auto Account Setup' with the text 'Outlook can automatically configure many email accounts.' Below this, the 'E-mail Account' radio button is selected. There are four input fields: 'Your Name' (with example 'Ellen Adams'), 'E-mail Address' (with example 'ellen@contoso.com'), 'Password' (masked with asterisks), and 'Retype Password' (also masked). A note says 'Type the password your Internet service provider has given you.' At the bottom, the 'Manual setup or additional server types' radio button is unselected. The 'Next >' button is circled in red, along with the '< Back' and 'Cancel' buttons.

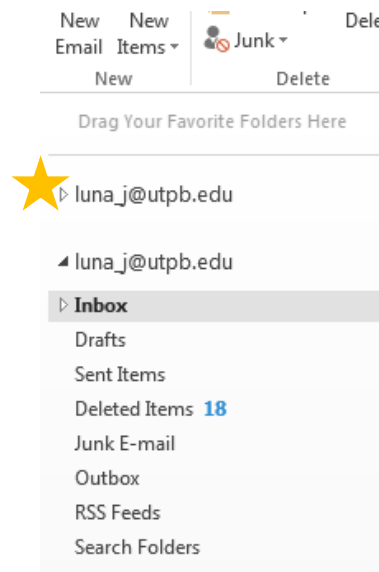
3. The screen will configure your settings for the new account. Once it is complete, click Finish. Once this is done, you will need to restart Outlook for the changes to take effect (It might take a few minutes for Outlook to re-open).



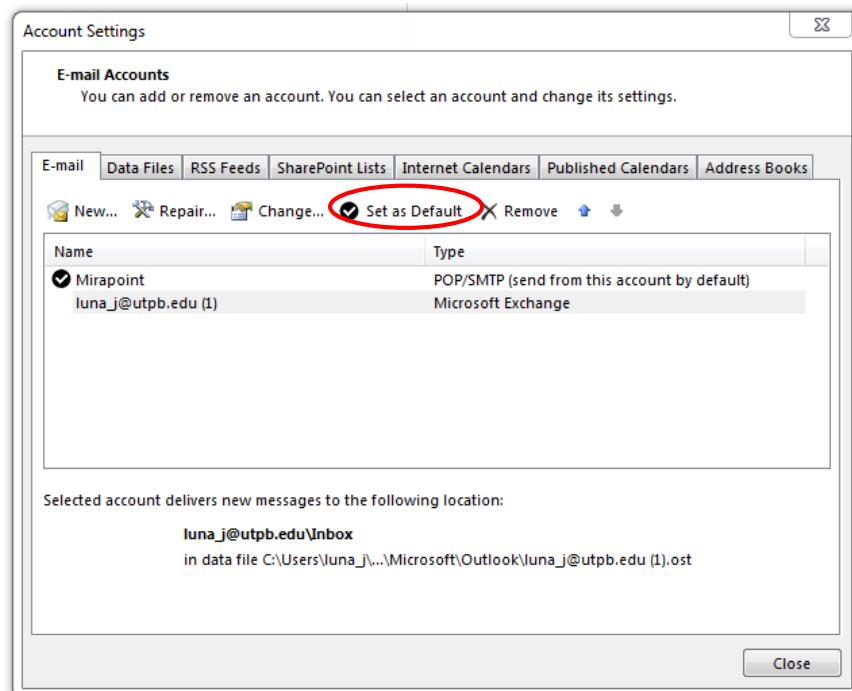
4. You will now need to rename the old account to be able to distinguish between the two. Go to File and click Account Settings.
 - a. Highlight the "POP/SMTP" account and click Change...
 - b. Click More Settings...
 - c. Remove the email address under Mail Account, rename as "Mirapoint", click OK. Click Next, click Close, and then click Finish.



**Please note: Once you finish this process, you will have 2 accounts in your Outlook. The new account (top) should not be used until the Office 365 go-live date of August 19, 2015.

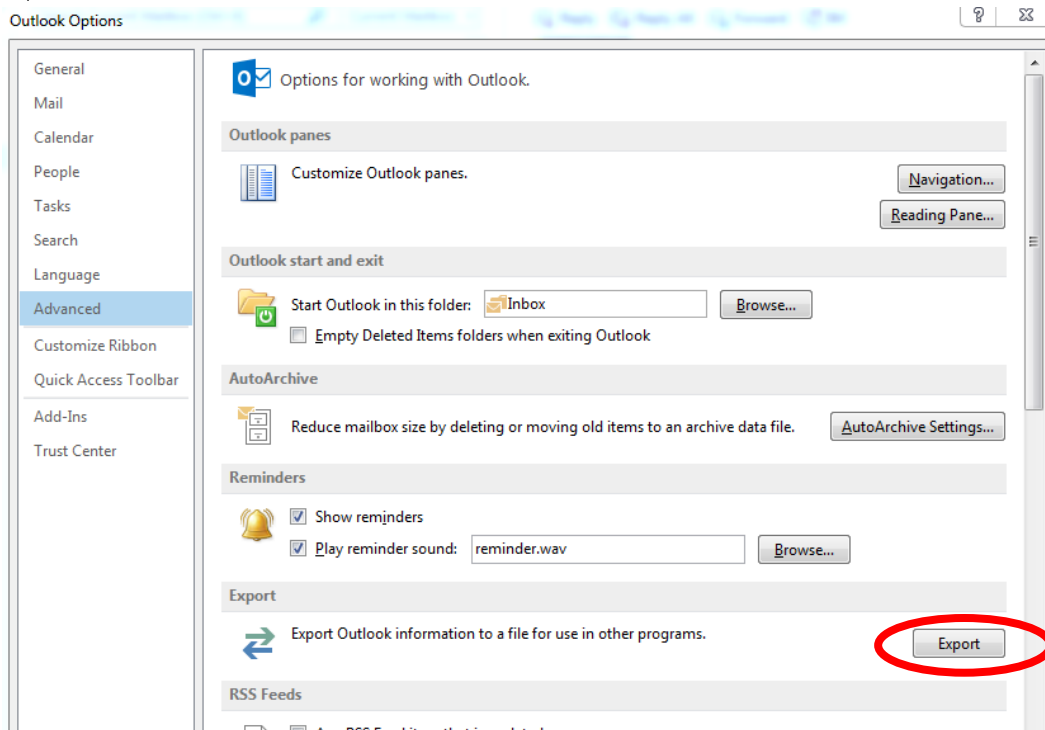


***On the go-live date (August 19th), you will need to set your new account (not Mirapoint) as the default account. Go to File, Account Settings, highlight the new account, click Set as Default.

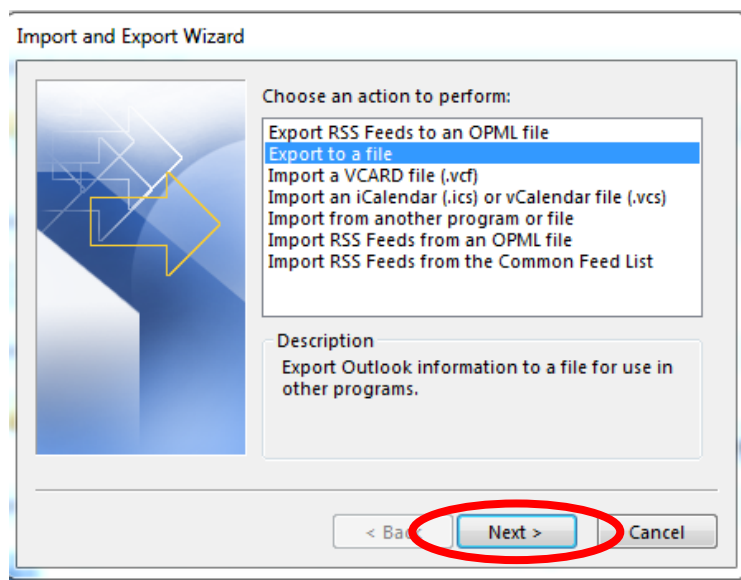


Export Old Account to File

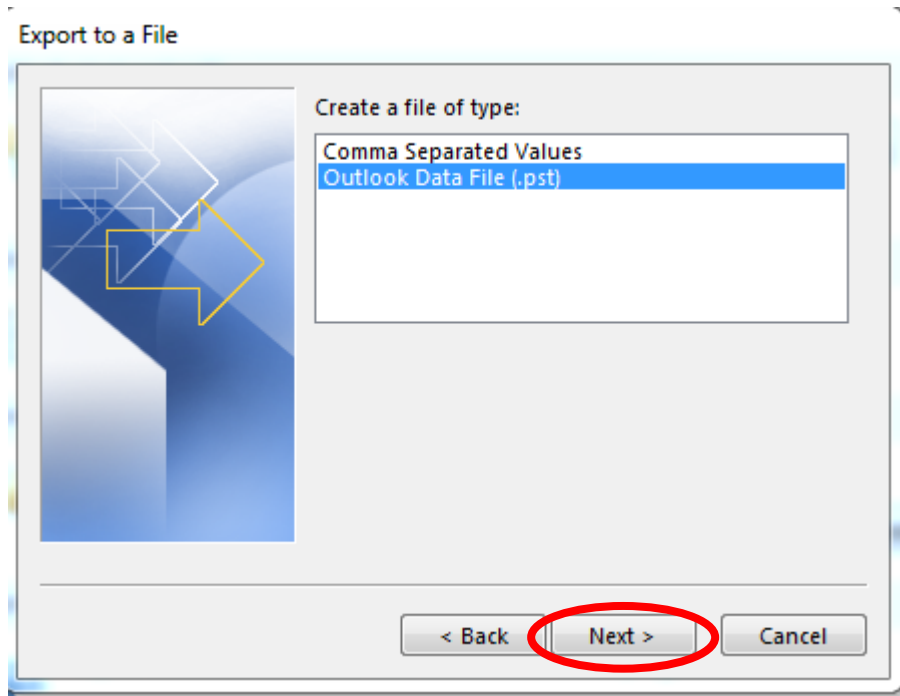
1. Open Outlook and select File. Click Options, click Advanced, and then click Export under Export.



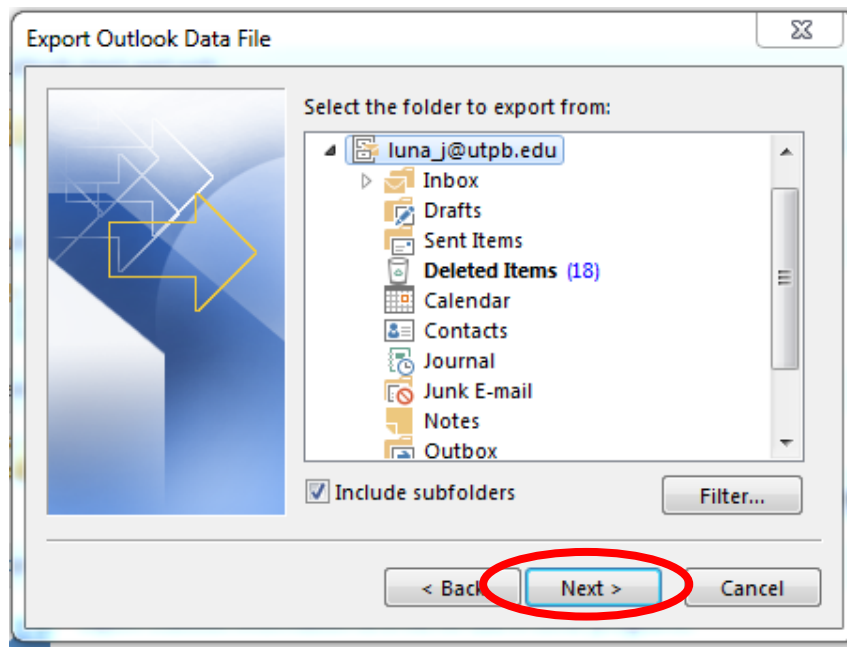
2. In the next screen, highlight Export to File and click Next.



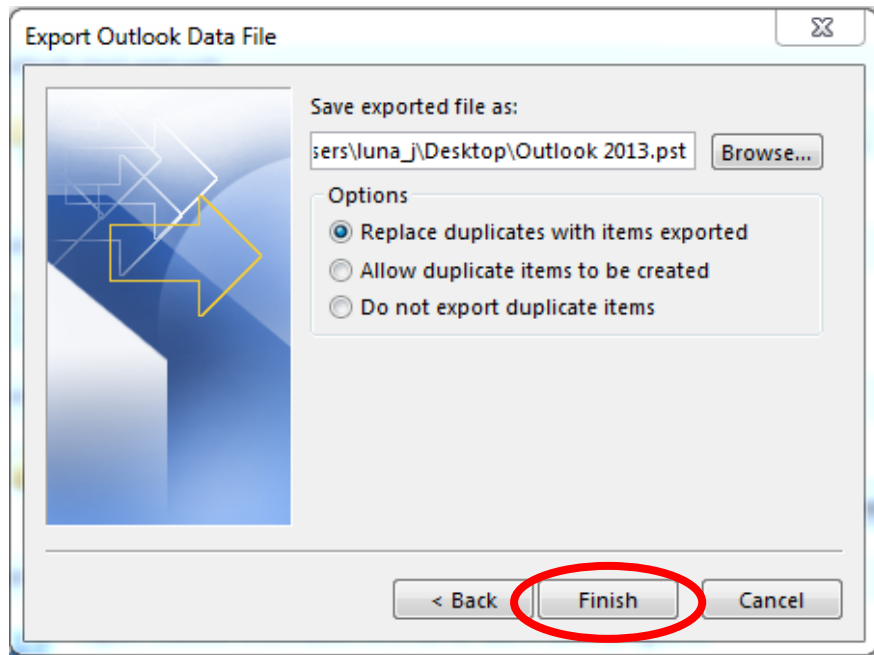
3. In the next screen, highlight Outlook Data File (.pst) and click Next.



4. In the next screen, highlight your e-mail account name, leave "Include subfolders" checked, and click Next.



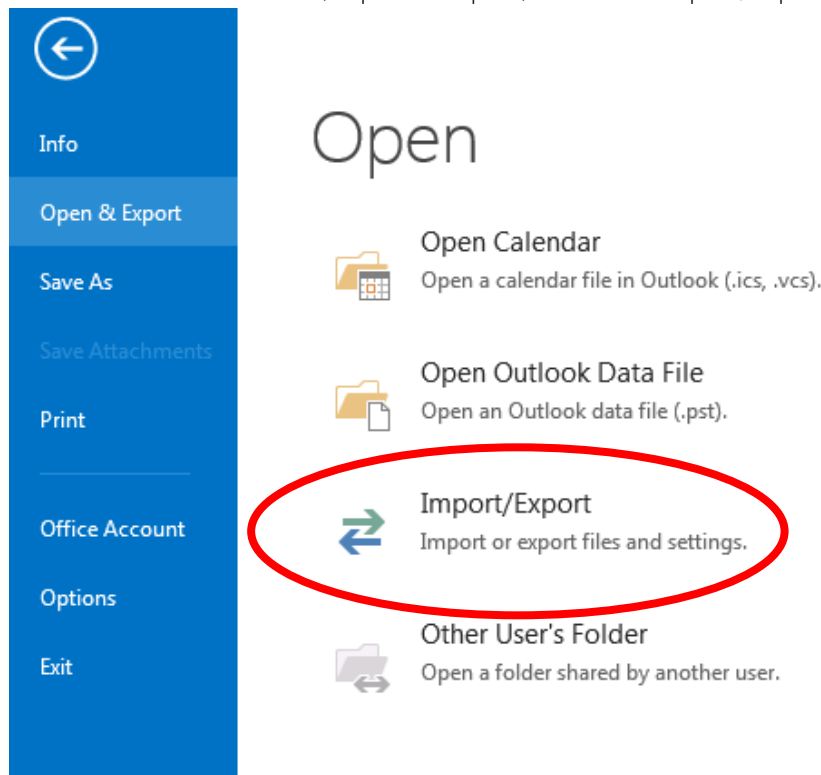
5. In the next screen, click Browse to select where you want to save your data file; your Desktop is an easily accessible choice. Once you name the file, click OK to save. Leave Options as "Replace duplicates with items exported" as this will cleanup any duplicate items in the export/import process. Click Finish.



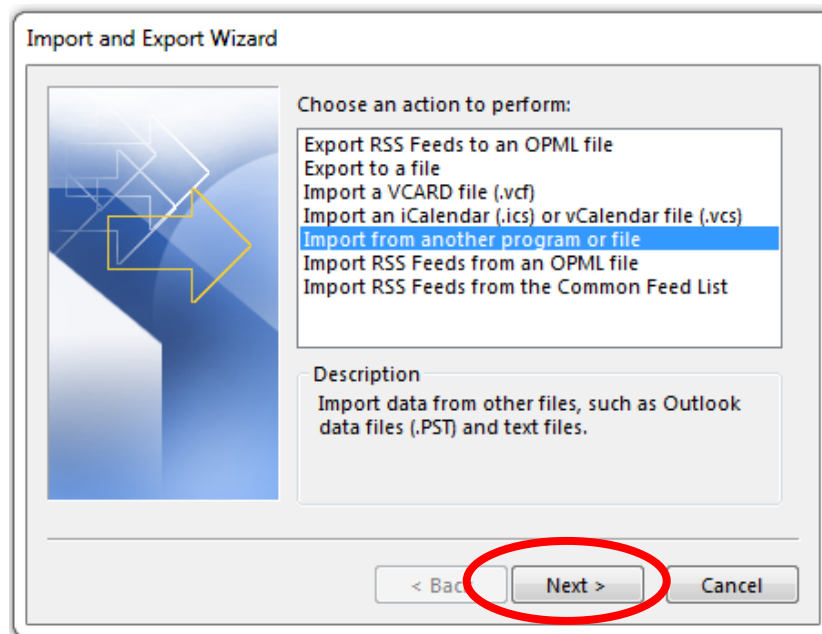
6. You will be asked to create a password for the export. Making this match your Office password will be an easy association for later. Once you have created your password, you will then have to enter your existing Office password. You will be back to the Outlook Options screen. Click OK to complete the export.

Import Old Account File to New Account

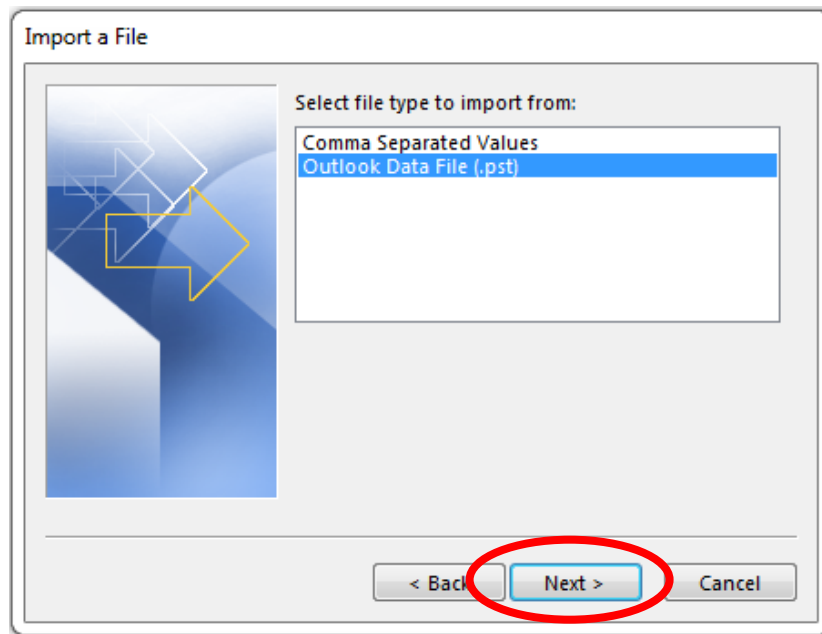
1. Open Outlook and select File, Open & Export, then click Import/Export.



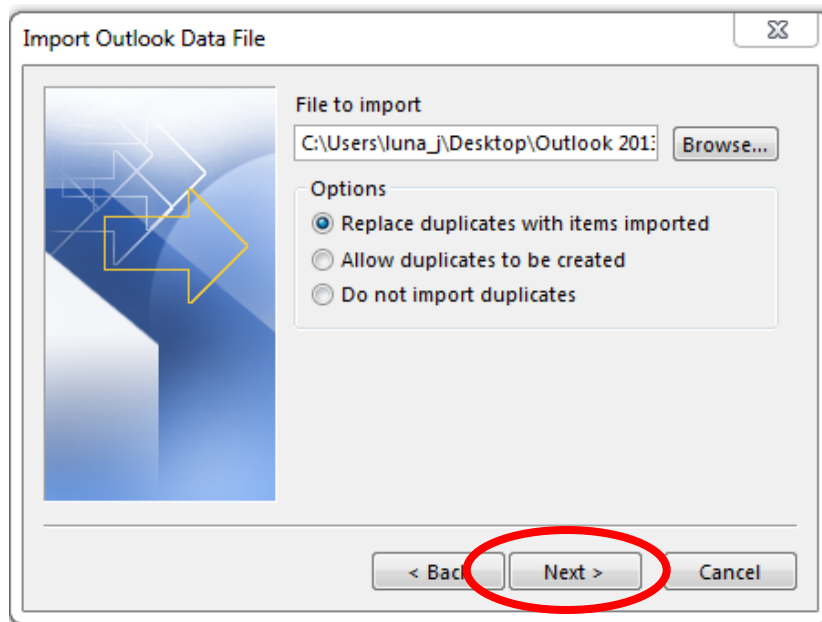
2. The next screen defaults to highlight "Import from another program or file"; leave this and click Next.



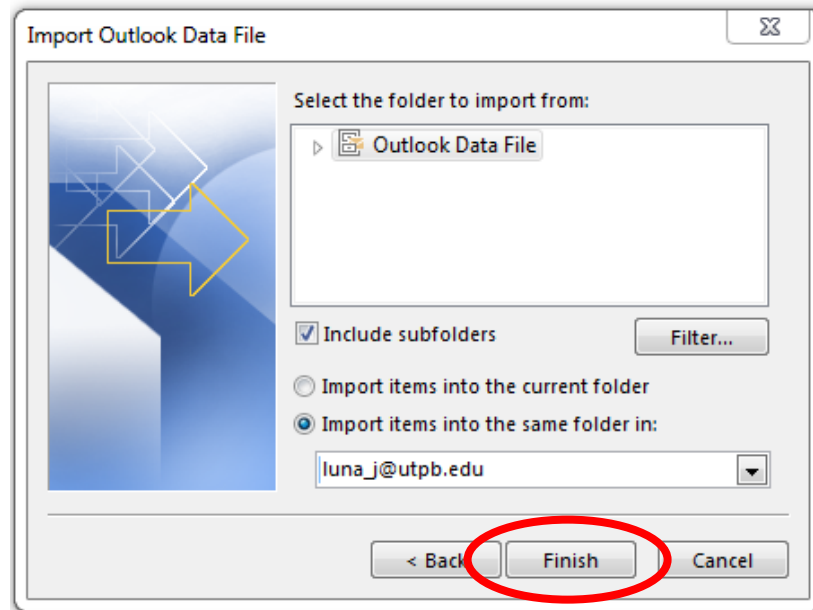
3. In the next screen, highlight Outlook Data File (.pst) and click Next.



4. Click Browse... to find the export file you saved on your desktop and click Open. Then leave the Options as is and click Next.



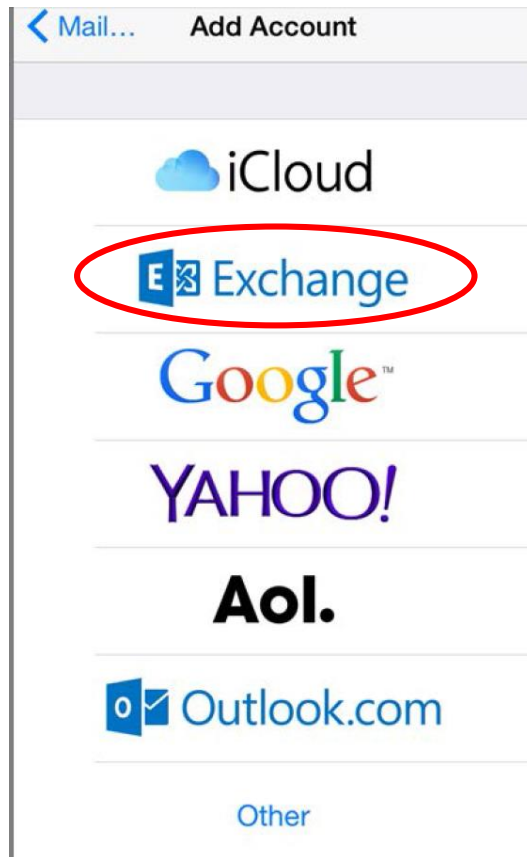
5. In the next screen, the drop-down menu should default to your new account, which is where you want to import your old information to. All other default options on this screen can be left as is. Click Finish.



6. Everything that you exported before should now be imported and showing in your new account. You can begin to use your new account going forward without interruption.

Configuring Outlook 365 for iPhone/iPad/iPod Touch

1. Tap Settings>Mail, Contacts, Calendars>Accounts>Add account. In this screen, tap Exchange.



2. In the next screen, enter your email and password and tap Next.

A screenshot of the 'Exchange' account setup screen. The screen has a light gray header with three buttons: 'Cancel' on the left, 'Exchange' in the center, and 'Next' on the right. Below the header are three input fields: 'Email' with the text 'tony@contoso.com', 'Password' with a series of black dots and a cursor, and 'Description' with the text 'Exchange'. At the bottom of the screen is a light gray bar with the text 'Exchange Device ID'.

3. By default, Mail, Contacts, and Calendar information should be synchronized. Tap Save.

4. If you're prompted to create a passcode, tap Continue and type a numeric passcode. If you're prompted and don't set up a passcode, you can't view this account on your device. You can also set up a passcode later in your settings.

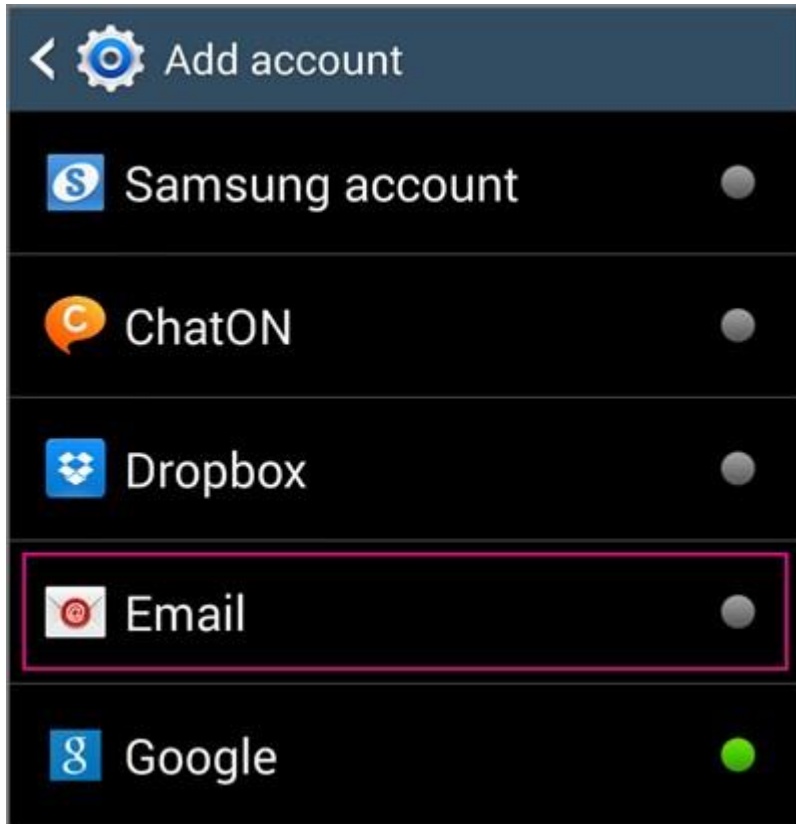
Not working? Make sure you entered your email and password correctly and try again. You can also try setting the account up manually following the steps in the section [Set up IMAP or POP email account](https://support.office.com/en-us/article/Set-up-email-on-iPhone-iPad-or-iPod-Touch-b2de2161-cc1d-49ef-9ef9-81acd1c8e234?ui=en-US&rs=en-US&ad=US) (<https://support.office.com/en-us/article/Set-up-email-on-iPhone-iPad-or-iPod-Touch-b2de2161-cc1d-49ef-9ef9-81acd1c8e234?ui=en-US&rs=en-US&ad=US>), but selecting this method will only add your email, not your calendar or contacts.

Source: <https://support.office.com/en-us/article/Set-up-email-on-iPhone-iPad-or-iPod-Touch-b2de2161-cc1d-49ef-9ef9-81acd1c8e234>

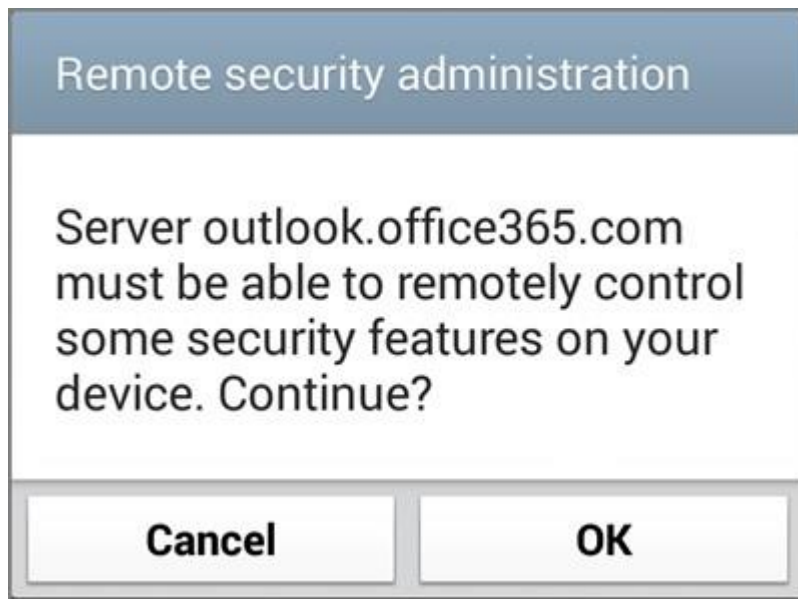
Configuring Outlook 365 for Android

Automatic Setup

1. Tap **Settings** > **General** > **Accounts** > **Add account** > **Email**. This application might be named **Mail** on some versions of Android.



2. Type your full email address, for example tony@contoso.com, type your password, and then tap **Next**.
3. Select the **Exchange** option.
4. Depending how the Office 365 administrator in your organization set up your account, you might receive a message about additional security features. Select **OK** to continue.

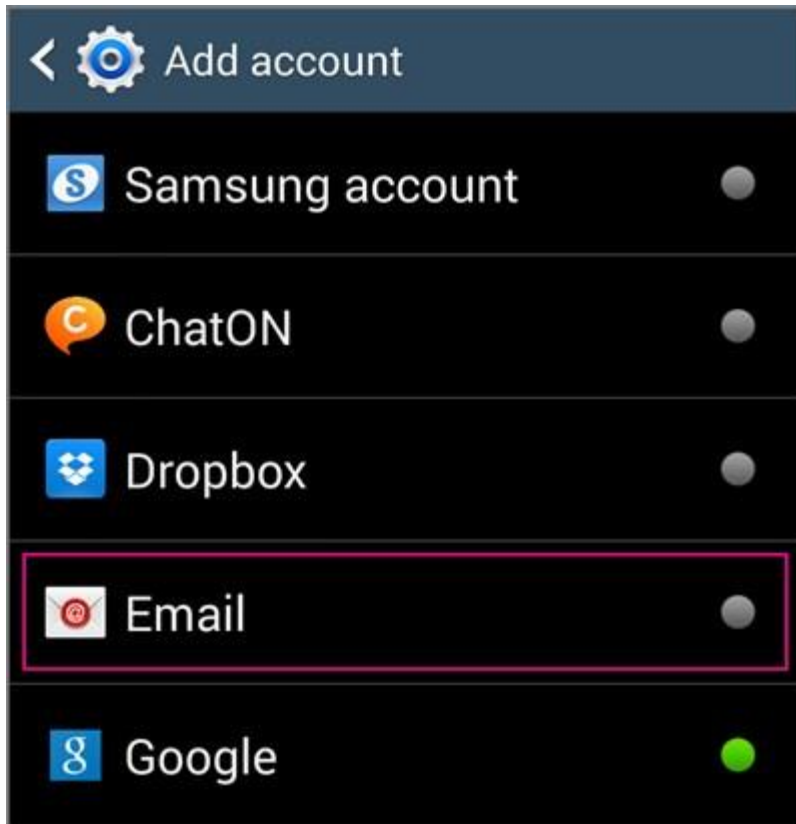


5. Once the device verifies the server settings, the **Account Options** page opens. Accept the defaults or select the options for how you want to receive and send your mail, and then tap **Next**. (You may need to scroll down to see **Next**.)
6. On the **Set up email** page you can change the name of your account. When you're finished tap **Done**.


If your device can't connect make sure you typed your email address and password correctly and try again. If you still can't connect try setting it up manually following the steps below.

Manual set up

1. Tap **Settings > Accounts > Add account > Email**. This application might be named **Mail** on some versions of Android.



2. Type your full email address, for example tony@contoso.com, type your password, and then tap **Next**.
3. Select **Manual**.
4. Review the settings on the **Exchange server settings** page and update if necessary.
 - **Email** Make sure your full email address is in this box, for example, tony@contoso.com.
 - **Domain\Username** Type your full email address in this box, for example, tony@contoso.com. If **Domain** and **Username** are separate text boxes in your version of Android, leave the **Domain** box empty, and type your full email address in the **Username** box.
 - **Password** Use the password that you use to access your account.
 - **Exchange Server** The server name for Office 365 for business is **outlook.office365.com**.
 - Make sure the **Use secure connections (SSL)** box is checked.

<  Exchange server settings

Email address

tony@contoso.com

Domain\username

tony@contoso.com

Password

.....

Exchange server

outlook.office365.com

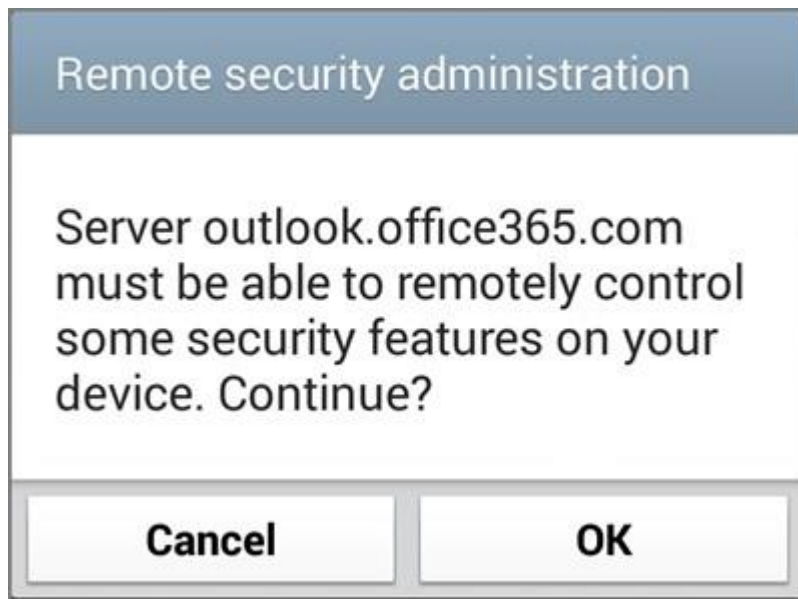
☒ Use secure connection (SSL)

☐ Use client certificate

Client certificate

Mobile device ID

-
5. Tap **Done**.
 6. Depending how the Office 365 administrator in your organization set up your account, you might receive a message about additional security features. Select **OK** to continue.



7. Accept the defaults or make changes for how you want your account to sync on your device. When you're finished, swipe to the bottom and tap **Next**.
8. On the **Set up email** page you can change the name of your account. When you're finished tap **Done**.

Configuring Outlook 365 for Windows Phone

1. In the [App list](#), tap **Settings**, and then tap **Email + accounts**.
2. Do one of the following:
 - If you have Windows Phone 8 or 8.1, tap **Add an account** > **Exchange**.
 - If you have Windows Phone 7 or 7.5, tap **Add an account** > **Outlook**.
3. Enter your full email address, for example tony@contoso.com, and your password, and then tap **Sign in**. If the phone finds your account settings, your email, calendar, and contacts will be synched to your phone.

Note If there's a problem connecting the email account, see the Microsoft Exchange or Office 365 email account section in [Set up or delete an email account for Windows Phone 8 or 8.1](#), or in [Set up or delete an email account for Windows Phone 7 or 7.5](#).

Accessing Outlook Web Interface

1. Open your preferred internet browser and go to <http://www.outlook.com/utpb.edu>.
2. In the login screen, enter your email address and password.



Sign in with your work or school account

☐ Keep me signed in

Sign in

[Can't access your account?](#)

3. You will be prompted to choose a default language and time zone. Once complete, click Save.