

# User Guide for Office 365 Setup on Windows, Mac, Mobile Devices, and Web

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**Overview:** This document will explain and show step-by-step instructions on how to setup an NEP corporate email account in Microsoft Outlook 2013 for Windows, Mac Mail, and Mobile Devices. Also will show step-by-step instructions for setting up Lync 2013 in Windows and Mac.

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## Outlook

1. Go to Start > Control Panel



2. Once inside Control Panel click on Mail (32-bit)





3. Next you will see this screen. Select "Show Profiles"



4. Show profiles will bring up the following screen. Click on "Add"

Mail
General
The following pr <u>o</u> files are set up on this computer:
NEP
· · · · · · · · · · · · · · · · · · ·
Add Remove Properties Copy
When starting Microsoft Outlook, use this profile:
Prompt for a profile to be used
Always use this profile
NEP
OK Cancel Apply



5. Name the new profile and click okay



6. On the Next screen enter your name, email address\*, and password then click next.

\*Note: Your email address must be first initial, last name (ex. psmith) and the fully qualified domain address for your division. (ex. psmith@nepinc.com, psmith@ncpvideo.com, psmith@svptv.com, psmith@screenworksnep.com, psmith@nepstudios.com, etc.)

Add Account		×
Auto Account Setup Outlook can autom	natically configure many email accounts.	ž
E-mail <u>A</u> ccount     A		
<u>Y</u> our Name:	Jordan Theis Example: Ellen Adams	
<u>E</u> -mail Address:	jtheis@nepinc.com Example: ellen@contoso.com	
Password:	*****	
Retype Password:	****	
	Type the password your Internet service provider has given you.	
Manual setup or ac	dditional server types	
	< <u>B</u> ack <u>N</u> ext > C	ancel



7. Once you have clicked next the system will start to setup your profile and search for settings.

Add Accourt	it in the second se	×
Searching f	or your mail server settings	${\sim}$
Configuring	0 0 0 0	
Outlook is	completing the setup for your account. This might take several minutes.	
×	Establishing network connection	
→	Searching for jtheis@nepinc.com settings	
	Logging on to the mail server	
	< <u>Back</u> <u>N</u> ext > Car	ncel

8. You will see a pop-up to allow the server to configure your email. Check "Don't ask me about this website again" and click allow.

1	🕖 Mic	rosoft Outlook
	8	Allow this website to configure jtheis@nepinc.com server settings?
		https://autodiscover-s.outlook.com/autodiscover/autodiscover.xml Your account was redirected to this website for settings. You should only allow settings from sources you know and trust.
		<u>A</u> llow <u>C</u> ancel



9. Once the system shows three check marks click on finish.

Add Account	×
Congratulations!	×.
Configuring	
Outlook is completing the setup for your account. This might	t take several minutes.
<ul> <li>Establishing network connection</li> </ul>	
<ul> <li>Searching for jtheis@nepinc.com settings</li> </ul>	
<ul> <li>Logging on to the mail server</li> </ul>	
Congratulations! Your email account was successfully co	onfigured and is ready to use. <u>Add another account</u>
	< Back Finish Cancel

10. You will be returned to the profile screen. Remove any profiles other than the one you just created. Check that "Always use this profile" is selected and that your new profile is selected then click ok.

🕐 Mail 📃 💌
General
The following profiles are set up on this computer:
NEP
Add Remove Properties Copy
When starting Microsoft Outlook, use this profile:
Prompt for a profile to be used
Always use this profile
NEP
OK Cancel Apply

11. Your new email profile is now setup and you are ready to begin using Outlook.



# **Outlook – Out of Office**

1. Once inside of outlook select the "File" tab at the top left of the screen.

03 📰 🖘 🗧		
FILE HOME SEND / RECEIVE	FOLDER VIEW	
New New Email Items * New Delete	Reply Reply Forward All Respond	Purchasing ♀ To Manager ■ Team Email ✓ Done ♀ Reply & Delete ♀ Create New Quick Steps
	·	
∡ Favorites	Search Drafts (Ctrl+E)	🔎   Current Folder 👻
Inbox	All Unread	By Date ▼ Newest ↓
Sent Items	We didn't find anyth	ning to show here.
Drafts		-
Deleted Items 246		
	-	
⊿ jtheis@nepinc.com		
▲ Inbox		
Dell		
HP		
Misc.		
Purchasing		
Drafts		
Sent Items		
Deleted Items 246		
Conversation History		
Deleted Messages		
Junk Email [65]		
News Feed		
Outbox		
Quick Step Settings		
RSS Feeds		
RSS Feeds1		
Sent Messages		
Search Folders		
Online Archive - jtheis@nepinc.c		



2. Once inside of the "File" tab select Automatic Replies.





3. At the automatic replies screen select "Send automatic replies". Here you can select times to start and end the out of office as well as type the messages you would like people inside and outside of the company to receive.

Automatic Replies - jtheis@nepinc.com
<ul> <li>Do not send automatic replies</li> <li>Send automatic replies</li> <li>Only send during this time range: Start time: Tue 4/22/2014</li></ul>
Inside My Organization 🚱 Outside My Organization (On)
Segoe UI 🔹 8 💌 B I 😐 🚣 🗄 🖅
Type out of office message here.
Rules OK Cancel

4. Once you are satisfied with your messages click ok at the bottom. Your out of office will be set. If you want to turn automatic replies off select "Do not send automatic replies".



### Lync

1. Click on the start menu and navigate to All Programs.



2. Find the folder called Microsoft Office 2013 and then click on Lync 2013.





3. At the Lync sign in screen type you email address and click sign in.

\*Note: Your email address must be first initial, last name (ex. psmith) and the fully qualified domain address for your division. (ex. psmith@nepinc.com, psmith@ncpvideo.com, psmith@svptv.com, psmith@screenworksnep.com, psmith@nepstudios.com, etc.)

L	Lync	– 🗆 🗙
Lyr		
Sig	n in	Q -
Sign-	in address:	
jtheis	@nepinc.com	
Delete	my sign-in info	
Need I	elp signing in?	
Sign i Avi	n as: ailable ▼	
	<u>S</u> ign In	
© Microso	oft Corporation. All rights reserve	d.



4. Next you will be prompted for your password. Enter your password and click sign in.

	Lync		-		×
Lync					
Sign i	n			¢ <del>•</del>	
Sign-in ad	dress:				
jtheis@nep	nc.com				
			Ch	ange	
User name	c				
jtheis@nepi	nc.com				
Examples: Lync Online All other use	users: username@domair rs: domain\username	1.com			
Password:					
✓ Save my	bassword				
Sign in as: Available	•				
<u>S</u> ign	In				
© Microsoft Cor	poration. All rights reserv	ed.			



5. Once you have signed into Lync you can add people to your Favorites. Start typing the person you are looking for in the search box. Once you find the person you would like to add right click on the person and select add to favorites.



6. Once you have added people to your favorites you will be able to select them from you list and send them messages.



### Mac Mail

1. Go to the Apple icon in the menu bar and go into System Preferences.



2. Click on Internet Accounts icon. For Lion and Mountain Lion OS X, the icon will be named Mail, Contacts and Calendars.





3. Click on Exchange. For Lion and Mountain Lion OS X, the account will be named Microsoft Exchange, as in the screenshot below.







4. Enter your name. email address and password in the fields provided. Click Continue. It will search the server for the specified email address.

Name:	Peter Smith
Email Address:	psmith@nepinc.com
Password:	

5. If for some reason the auto-discover fails and you receive an error, go back to the Name field and clear it out to leave it blank and try again.

mith@nepinc.com
••••



6. After successful confirmation, an Account Summary will be provided with the following account information. Click Continue to proceed.

ccount Summar	Ý
Internet Accounts address you prov up on your comp	found a server account for the email ided. The following account will be set uter:
Account type:	Exchange
Full name:	
Email address:	
Server address:	outlook.office365.com

7. Select the applications for which you want to sync with your Exchange account. By default, all options are checked. Click Done to finish the setup.

E 🛛 Excha	nge
Select the apps to use with	· · · · · · · · · · · · · · · · · · ·
🧭 返 Mail	
Contacts	
🧭 📩 Calendar	
🗹 🧾 Notes	
Reminders	
?	Cancel Done



8. You will now have a completed Exchange account setup on the Mac. To begin to use your email, launch the Mail icon located on your Dock at the bottom of your desktop.



# Adding a Signature – Mac Mail Directions

1. In the Mail menu bar, go to Mail then Preferences.



2. Click on Signatures, then click on the NEP email account.





3. Click the + Plus button to add a new signature.

00		Signature	s			
General Accounts R	SS 🙀 SS Junk Mail F	A) onts & Colors	Viewing	Composing	Signatures	Rules
All Signatures 0 signatures () NEP Outlook 1 signature	Signature #1		ways mai	tch my defa	ault messa	pe font
		(He	elvetica 12	)		je rone
Choose	Signature: No	one Place signati	ure above	e quoted te	×t	?

4. Enter a name for the signature and type your signature in the space provided.

00	Sign	atures
General Accounts R	SS 📄 A SS Junk Mail Fonts & C	colors Viewing Composing Signatures Rules
All Signatures 0 signatures NEP Outlook 1 signature	NEP Signature	Peter Smith Engineer   NEP O: 412. 555. 5555   C: 412.555.5555 psmith@nepinc.com www.nepinc.com Superior Service & Lasting Relationships Integrity   Innovation   One Team   Passion CONFIDENTIALITY NOTICE & DISCLAIMER: This e-mail may contain confidential, proprietary, or privileged information. If you are not the intended monitorin places contact the condet by make a mail
	+ -	Always match my default message font (Helvetica 12)
Choose	Signature: None	gnature above quoted text ?



# OSX 10.6 and earlier - Out of Office

1. Click Mail and choose Preferences...



2. Click Rules icon and choose Add Rule

000				Rules				
General A	@ .ccounts	RSS RSS	Junk Mail	Fonts & Colors	Viewing	Composing	Signatures	Rules
Active	Descrip News F	tion From A	pple				Add R Edit	ule t
							Kenno	?



3. Name the rule. Change options to: all, Every Message, <u>Reply to Message</u>.

Description: Out of office	
If all 🗘 of the following conditions are met:	
Every Message	- +
Perform the following actions:	
Reply to Message    Reply message text	• ÷

4. Click Reply Message Text and enter your email detail, click OK twice.

00	Reply Message
ext to include	e before original message:
Thank you for yo	our email, I am out of the office until
	Cancel OK



5. When prompted click Apply or choose Don't Apply to simply save the rule for later.



6. To remove the auto-response rule, go to Preferences, Rules, and uncheck the active rule. Remembering to de-activate the rule upon your return is necessary to avoid sending the reply when it is not needed.



# OSX 10.7 and later – Out of Office

1. While Mail is open and you are looking at your email, right-click on your Inbox folder and choose Get Account Info.



2. Click on the Out of Office tab.

1	Quota Limits	Out of Office	Mailbox Behaviors	Subscription List	Summary

3. Click the checkbox to Send Out of Office Replies.





4. Enter your out of office message in both the internal and external reply fields.

By default, the out of office is set until it is disabled, meaning that you will need to remember to turn it off when you are back in the office.

		Account Info	
	Account:	[	\$
Quota <mark>L</mark> imit	s Out of Office	Mailbox Behaviors	Subscription List Summar
Send Ou Starting 2/	t of Office replies: 12/1982 11:00 AM 🕃	Until disabled ‡ Ending 2/12/1982 1	ेंह 1:00 AM 🕃
Internal Rep	oly:		
External Rep	oly:		
External Rej Hello, I w for furthe	ply: ill be out of the Office t r assistance. Thank Yo	this week. Please contact ou.	a member of my department

5. To set the Out of Office reply to start and end automatically, choose While Scheduled from the dropdown field and set the starting and end dates and times.





### Lync

Lync is Microsoft's chat client. It can also be used for online video meetings.

1. Once you have logged into webmail by going to <a href="http://outlook.office365.com">http://outlook.office365.com</a>, navigate to the top right and click on the gear icon and select "Office 365 Settings"

¢	
Re Se	efresh et automatic replies isplay settings
M Of	ffline settings
Cł O	hange theme ptions
O	ffice 365 settings

2. Click on Software: Install and Manage Software.

Coffice 365

# Office 365 settings

#### me

ptarasi@nepinc.com

#### software

Install and manage software.

#### password

Change your password.

get started

View the get started experience.



3. Click on Lync in the software list, then click on the Install button to download Lync.

Coffice 365		Outlook	Calendar	People	Ne
۲					
software					
Office	Lync				
Lync					
tools & add-ins	Use Lync for Mac 2011 to connect with colleagues through instant messagin	q, audio, vic	leo, and onli	ne meeting	<b>3</b> 5.
desktop setup		, , , , , , , , , , , , ,			
phone & tablet					
	Lync				
	Review system requirements				
	install				

4. Save the setup file and run this file to begin setup of Lync.





5. Double click the Lync Installer.



#### 6. Click Continue





7. Click Continue and click Agree to accept the license terms.



8. Click Continue to install Lync to the Macintosh HD location.





9. After Lync is installed, launch it from the Applications folder. In the Lync for Mac sign-in window, type your email address and user ID (ex. psmith@nepinc.com) and password, but do not sign in at this time and continue to step 10.

00	Microsoft Lync
Ly	nsoft* <b>nc:</b> mac <sup>2011</sup>
Email Address:	<b>▼</b>
Sign in as:	Automatic 🗘
User ID:	
Password:	
	Remember my password
	Advanced





10. Click Advanced at the bottom of the window.

11. Under Authentication, clear the Use Kerberos check box. Under Connection Settings, click Manual configuration. In both the Internal Server Name box and the External Server Name box, type or paste sipdir.online.lync.com:443.

Click OK to continue.

Authentication	
Use Kerberos	
Connection Setting	
elect the method yo onnection settings.	ou want to use to configure your
Automatic config	uration
Manual configura	tion
Internal Server Na	ame:
sipdir.online.lynd	c.com:443
the second	
External Server N	ame:
External Server N sipdir.online.lyne	ame: c.com:443



12. In the Lync for Mac sign-in window, click Sign In.

13. If you receive messages for Lync to allow your information to be stored in your keychain, click Always Allow.

	Microsoft Lync wants to use your confidential information stored in "Lync Server" in your keychain. Do you want to allow access to this item?	
▶ Details		
?	Always Allow Deny Allow	

	Microsoft Lync wants to sign using key "OC_KeyContainerptarasi@nepinc.com" in your keychain. Do you want to allow access to this item?
Details	
?	Always Allow Deny Allow



## IPhone / IPad

**1.** Go to settings and select Mail,Contacts,Calendars then you will see the following screen. Click on Add Account.

●●●●○ AT&T 🗢	2:50 PM	29% 💷		
Settings Mail, Contacts, Calendars				
ACCOUNTS				
<b>iCloud</b> Contacts, Safari,	Reminders and	3 more		
Add Account		>		
Fetch New Da	ata	Push >		
MAIL				
Preview		2 Lines >		
Show To/Cc I	_abel			
Flag Style		Color >		

#### 2. Click on Exchange.





3. Enter your NEP email address and password.

\*Note: Your email address must be first initial, last name (ex. psmith) and the fully qualified domain address for your division. (ex. psmith@nepinc.com, psmith@ncpvideo.com, psmith@svptv.com, psmith@screenworksnep.com, psmith@nepstudios.com, etc.)

Enter the description as NEP, click Next when finished.

•••∘∘ AT&T 穼	12:21 PM	73% 🔳
Cancel	Exchange	Next
Email	jtheis@nepinc.c	com
Password	•••••	
Description	NEP	
QWE	RTYU	ΙΟΡ
ASD	FGHJ	KL
🛨 Z X	CVBN	M
123	space	return

4.. Turn on syncing for contacts, calendars, and reminders. Once you have made your selection hit Save.

•••• A		3:34 PM	15% 💭
Cancel		Exchange	Save
	Mail		
	Conta	cts	
	Calend	dars	$\bigcirc$
	Remin	ders	



#### 5. Click on the account you just created.

••••○ AT&T 奈	2:55 PM	27%		
Settings Mail, Contacts, Calendars				
ACCOUNTS				
<b>iCloud</b> Contacts, Safari, Re	eminders and	d 3 more	>	
Nepinc Mail			>	
Add Account			>	
Fetch New Data	a	Push	>	
MAIL				
Preview		2 Lines	>	
Show To/Cc La	bel		)	

6. Adjust your settings for length of days that you would like your email to sync.



#### **Delete Account**

7. Go back to the Account section and choose your old NEP account and delete it. Your newly created Exchange account should be the only company account on your phone.

8. To access your mail, click on the mail icon off of your home screen.



## Android

1. Go into Settings and click on +Add Account or Accounts and Sync option, depending on the version of Android OS.



2. Click on Corporate email icon or Microsoft Exchange ActiveSync, depending on the version of Android OS.





3. Enter your NEP email address and password.

\*Note: Your email address must be first initial, last name (ex. psmith) and the fully qualified domain address for your division. (ex. psmith@nepinc.com, psmith@ncpvideo.com, psmith@svptv.com, psmith@screenworksnep.com, psmith@nepstudios.com, etc.) Click Next to continue.

•	4 <b>95 / 1</b> :36
کې Add an Exchange د	account
You can set up an account in just a fe _psmith@nepinc.com	Exchange ew steps. n
Send email from th	is account by default.
	Next

4. Enter your full email address in the Domain\Username field. In the server field, enter **outlook.office365.com**. Keep everything else as default and click Next to continue.

<b>A</b>	부두백 💼 2:01
< ᅌ Account setup	
Domain\Username	
psmith@nepinc.com	
Password	
·····	
Server	
outlook.office365.com	
🗹 Use secure connection (SSL)	)
Accept all SSL certificates	
Client certificate	Salaat
None	Select
Port	
443	
Mobile Device ID	
androidc46305914	
Previous N	lext



5. Adjust the settings by picking and choosing what you would like to sync. By default, all options are checked shown in the screenshot below. Click Done to continue.



6. You will get a screen to activate device administrator. Click Activate to enable the security features needed for Outlook to setup the email account.





7. Enter the description as Nep and click Next when finished. To access your email, click on the Email icon on the Home screen desktop.





## **Access Webmail**

1. Open a browser (Internet Explorer, Firefox, Chrome, Safari, etc.) and navigate to <u>http://outlook.office365.com</u>. This will take you to the login screen.



Enter your NEP email address and password. Click sign in to proceed to email.
 \*Note: Your email address must be first initial, last name (ex. psmith) and the fully qualified domain address for your division. (ex. psmith@nepinc.com, psmith@ncpvideo.com, psmith@svptv.com, psmith@screenworksnep.com, psmith@nepstudios.com, etc.)





3. Click on Outlook tab to view your email. You can also view your Calendars and People by clicking on the respective tabs.





## Web – Out of Office

1. Open a browser (Internet Explorer, Firefox, Chrome, Safari, etc.) and navigate to <u>outlook.office365.com</u>. This will take you to the login screen.



2. Enter your NEP email address and password.

\*Note: Your email address must be first initial, last name (ex. psmith) and the fully qualified domain address for your division. (ex. psmith@nepinc.com, psmith@ncpvideo.com, psmith@svptv.com, psmith@screenworksnep.com, psmith@nepstudios.com, etc.)





3. Once you have logged in, navigate to the top right and click on the gear and select "Set automatic replies"

A https://outlook.office365.c	om/owa/?wa=wsignin1.0#path=/mail			P 🖬 - 🖊 1
Office 365			🖌 🛎 Outlook Calendar People Newsfeed OneDrive Si	ites 🚥 🛛 Jordan Theis 👻 👩 🗠
⊕ new mail	Search Mail and People DRAFTS	ITEMS BY DATE		Refresh Set automatic replies
cc	all unread to me flagged			Manage ages
Favorites				Cotting and the second
Inbox Sent Items				Change theme Options
Drafts Deleted Items				Office 365 settings
Iordan Theis				
Inbox				
Dvafts				
Sent Items	, _ ) There are no ite	ems to	There are no items to show in this view.	
Concentrations Mintered	<ul> <li>show in this view</li> </ul>	w.		
Deleteri Messanes				
Junk Fmail [40]				
News Feed				
Notes				
Quick Step Settings				
RSS Feeds				
RSS Feeds1				
Sent Messages				
n-Place Archive - Jordan Theis				
TASKS				

4. At the automatic replies screen select "Send automatic replies". Here you can select times to start and end the out of office as well as type the messages you would like people inside and outside of the company to receive.

	Sec. 25 com/com/Manual Research and Research Advances (Research & Research &		0 63		-
Office 365	III V IIII III V VIII VIII VIII VIII V	d OneDrive Sites +++	Jordan Theis	- 0	1
Ð					
ptions account organize email groups sete mailboxes settings phone block or allow apps	Note rules: automatic replies: delivery reports: retention policies Create rate replie: Deliver of the delivery reports: retention policies I cure retention replie: I cure retention retention: I cure retention retention: I cure retention retention: I cure retention: <				

5. Once you are satisfied with your messages click save at the bottom. Your out of office will be set. If you want to turn automatic replies off select "Don't send automatic replies".