

## Office 365 – Outlook Setup Instructions and Basic Troubleshooting

### Connecting to the Cloud

**Step 1.** Log off the current Outlook client.

**Step 2.** Shutdown Lync (if used):

Left click the Show Hidden Icons button on the taskbar. (For most PCs this is the bottom right corner.) Then right click the Lync icon and select **Exit**.



**Step 3.** Restart Outlook

- There will be a short delay the first time Outlook starts
- You will be prompted for your credentials
  - You should log in with your full email address as the username ([firstname.lastname@agencyacronym.ny.gov](mailto:firstname.lastname@agencyacronym.ny.gov)). For most users, the password will match their regular workstation domain password. Other users may have separate NYSeMail account passwords. Click **Remember my credentials** to set up automatic login.



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### OWA

If you are not able to get to your email through your desktop client, try OWA before going any further.

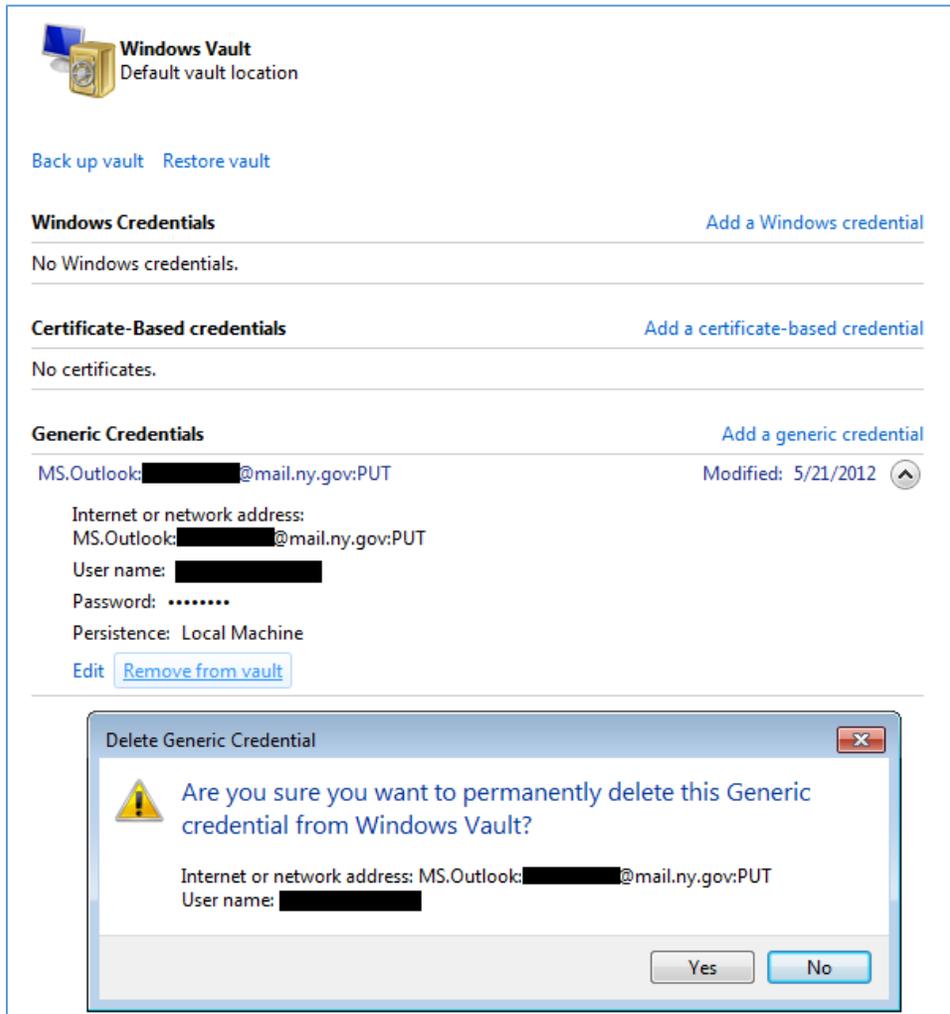
Type the address <https://portal.microsoftonline.com>. User name and password same as above.

### Password Prompts:

#### Clear Credentials:

If experiencing repeated password prompts in Outlook, you may try the following procedure to clear stored passwords and reconnect.

1. Close **Outlook** and Open the **Control Panel** and select the **Credential Manager** icon.
2. Remove any and all entries corresponding to MS Outlook credentials.



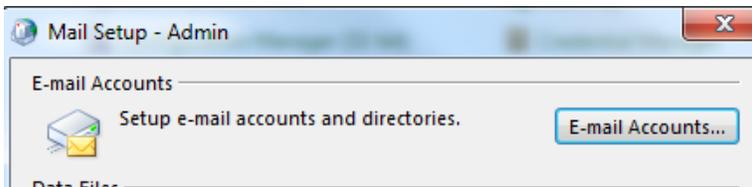
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3. Reopen **Outlook**. When prompted for credentials you should log in with the email address as the username. For most users, the password will match their regular workstation domain password. Other users may have separate NYSeMail account passwords. Click **Remember my credentials** to set up automatic login.

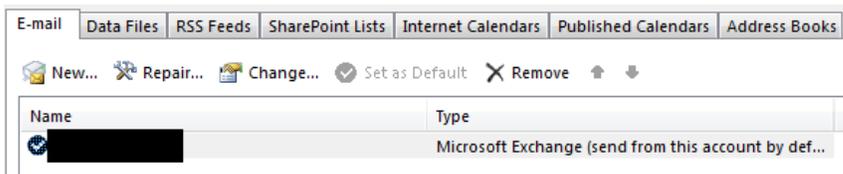


If you still cannot log in, please try repairing your profile:

1. Control Panel and double click the Mail Icon.
2. Select Email-Account.



3. Highlight **Microsoft Exchange Server**.

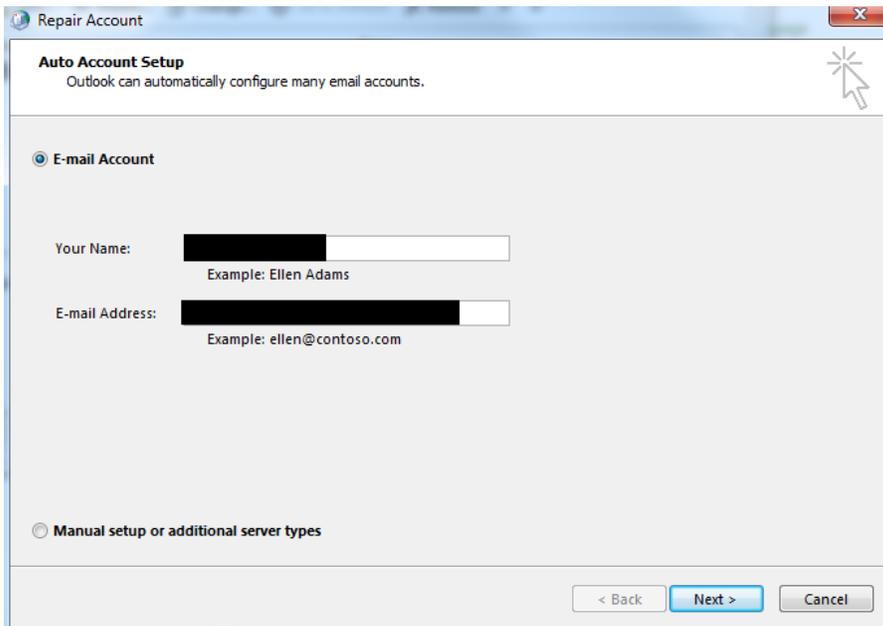


4. Select **Repair**.



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5. Select **Next**.

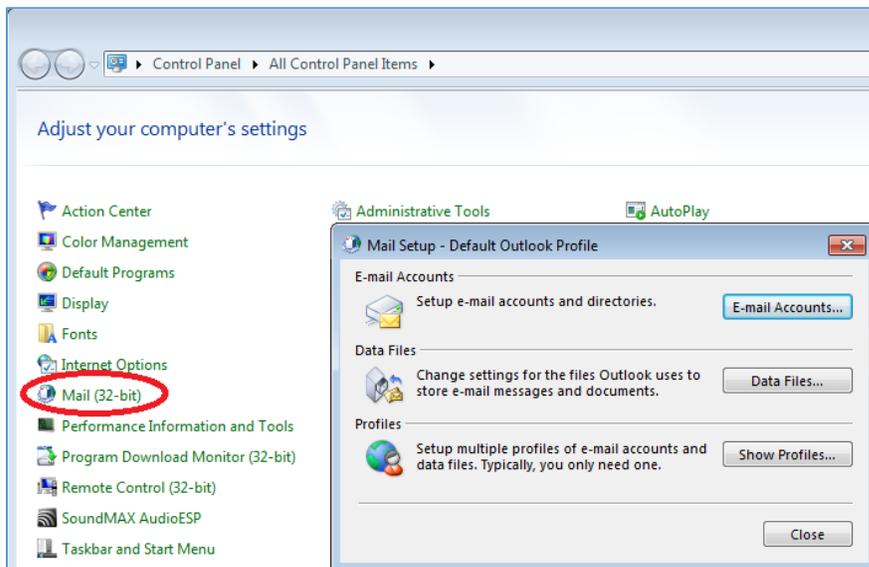


6. Wait until you see the “Your e-mail account is successfully configured to use Microsoft Exchange.”
7. Select **Finish** and **Close**.

**If these steps do not clear the issue, Create a New 365 Profile.**

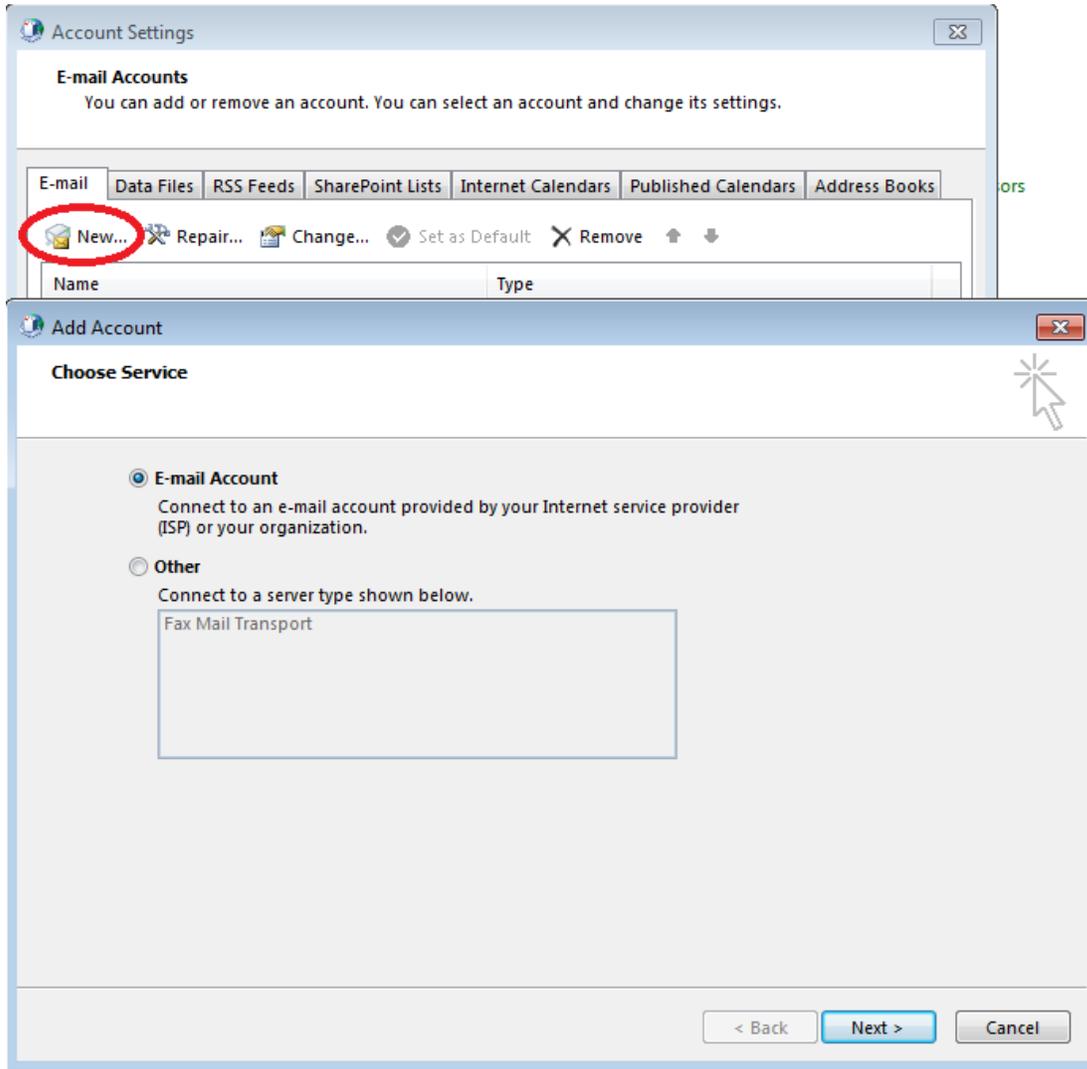
Follow the steps below to set up a New Profile. (Do not delete the current profile.)

1. Open the **Control Panel** and select the **Mail** icon, then click **Email Accounts** in the Mail Setup window.



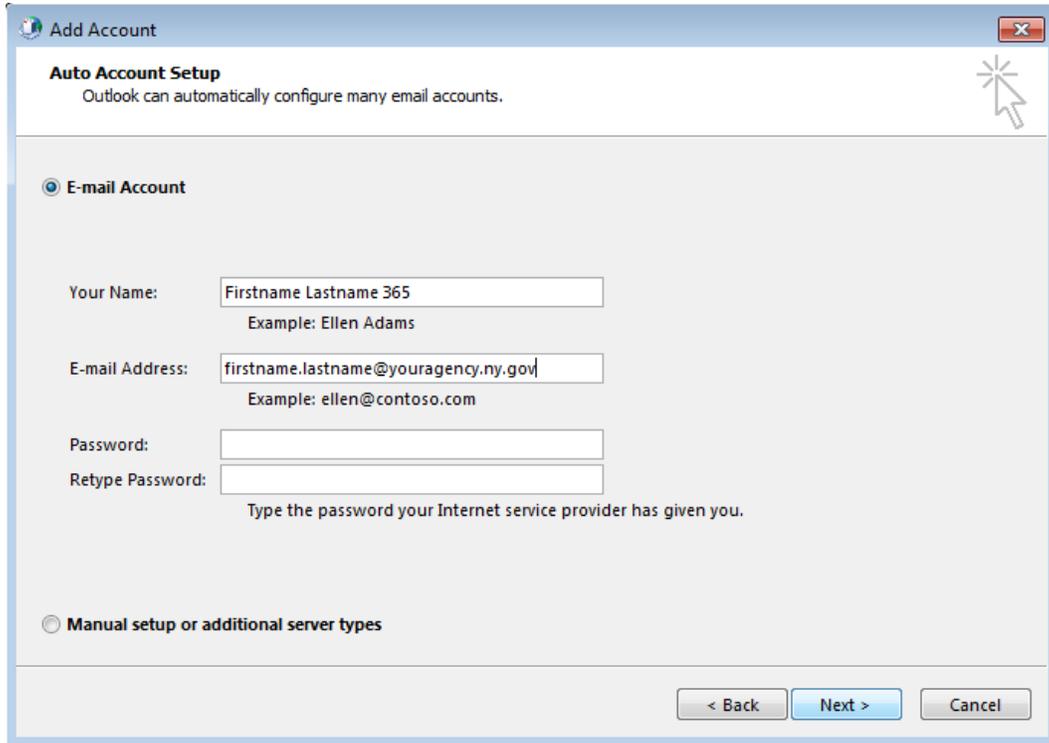
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2. Click **New** and the Add Account Window will open. Make sure **E-mail Account** is selected and click **Next**.



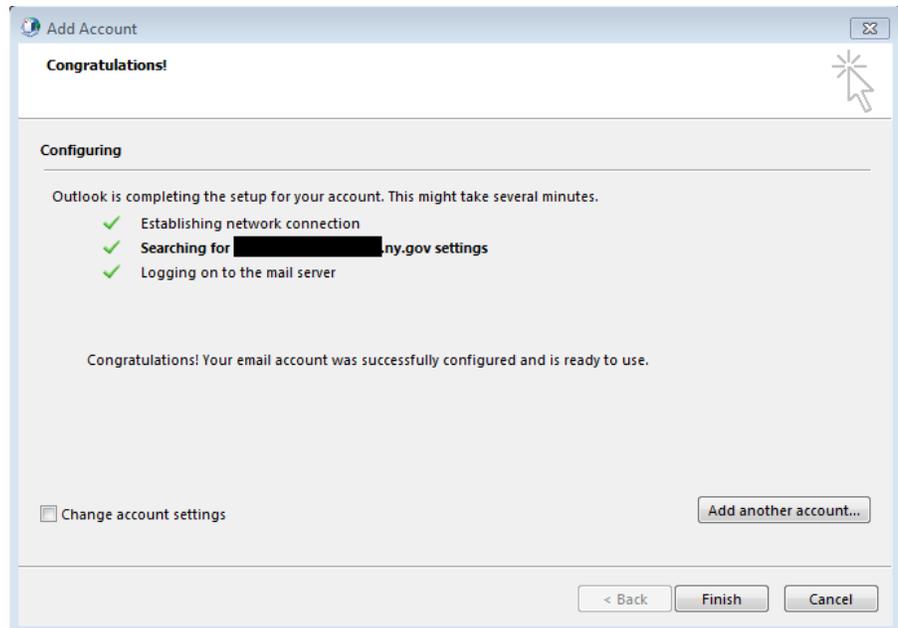
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3. In the **Your Name** field, enter a name for the new profile. (Suggest *Name* + “365” to make it clear that this new profile is configured for use with Office 365.) Then enter the email address. Do not attempt to fill in the Password fields. Click **Next**.



The screenshot shows the 'Add Account' dialog box in Outlook. The title bar reads 'Add Account'. Below the title bar, it says 'Auto Account Setup' and 'Outlook can automatically configure many email accounts.' There are two radio buttons: 'E-mail Account' (selected) and 'Manual setup or additional server types'. Under 'E-mail Account', there are four input fields: 'Your Name' (containing 'Firstname Lastname 365'), 'E-mail Address' (containing 'firstname.lastname@youragency.ny.gov'), 'Password', and 'Retype Password'. Below the password fields is the text 'Type the password your Internet service provider has given you.' At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

4. The mailbox should then complete setup automatically. If the process fails, double-check that you are using the correct email address and try again.



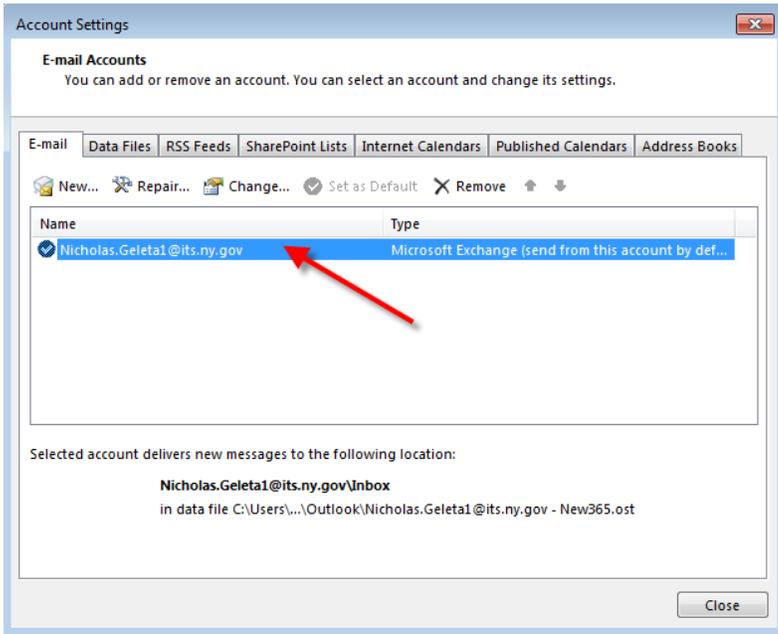
The screenshot shows the 'Add Account' dialog box in Outlook, now on the 'Congratulations!' screen. The title bar reads 'Add Account'. Below the title bar, it says 'Congratulations!' and 'Configuring'. The main text reads 'Outlook is completing the setup for your account. This might take several minutes.' There are three green checkmarks with corresponding text: 'Establishing network connection', 'Searching for [redacted].ny.gov settings', and 'Logging on to the mail server'. Below this, it says 'Congratulations! Your email account was successfully configured and is ready to use.' At the bottom left, there is a checkbox labeled 'Change account settings'. At the bottom right, there is a button labeled 'Add another account...'. At the very bottom, there are three buttons: '< Back', 'Finish', and 'Cancel'.

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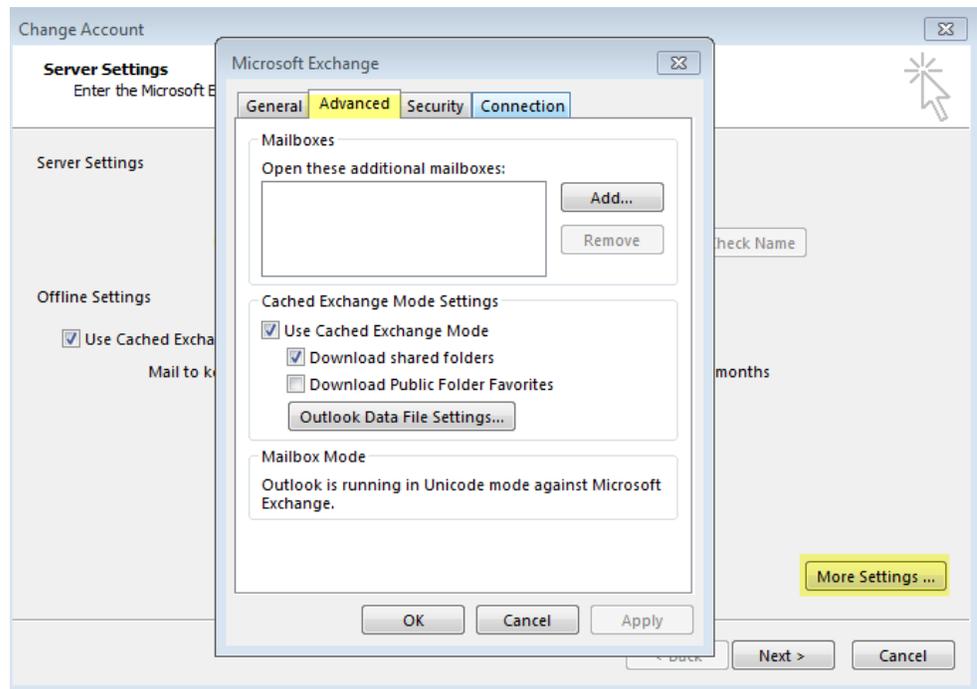
### Removing a shared mailbox from your outlook profile

File → Account Settings → Account Settings

Double click on the name of the user



Click **More Settings** and then click the **Advanced Tab** on the top. Remove any shared mailboxes listed in the box.



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### Re-establish Shared Mailboxes/Calendars: (for Office 2010 & 2013)

If applicable, re-establish any Shared Mailboxes you had prior to the move.

To add a shared mailbox that is already in the Office 365 to your Outlook Profile:

Select File>Account Settings>Account Settings

Select New

Type the primary email address of the shared mailbox into the email address field:

(agencyacronym.sm.description@agencyacronym.ny.gov)

No other data needs to be provided.

Select Next

You will be prompted for your user address and your password. You must delete the email address of the shared mailbox within the prompt and type in your full email address and your NYS password.

You will get prompted twice and you must do this twice.

Add Account

**Auto Account Setup**  
Outlook can automatically configure many email accounts.

E-mail Account

Your Name:   
Example: Ellen Adams

E-mail Address:   
Example: ellen@contoso.com

Password:

Retype Password:   
Type the password your Internet service provider has given you.

Manual setup or additional server types

< Back   Next >   Cancel