

# RB Capital – Mailbox Migration

## User Experience Guide

IDC S.p.A.

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# Introduction

The objective of this document is to provide a guide for the user experience after completion of the migration of rb-capital.co.uk mailboxes from the current UK Exchange 2013 to Office 365.

This document contains detailed steps on how to reconfigure Outlook once the mailboxes are moved to the new environment on Office365.

This guide contains the following sections:

- Outlook Configuration for Windows laptops
- Outlook Configuration for Mac laptops
- Outlook Configuration for Android devices
- Outlook Configuration for iOS devices

**NOTE: This document contains directions on how to configure Outlook for Office 365. If there are any issues in configuring Outlook, please note that OWA (Outlook on the Web) can be used as an alternative to access your mailbox at any time using a web browser and the below URL.**

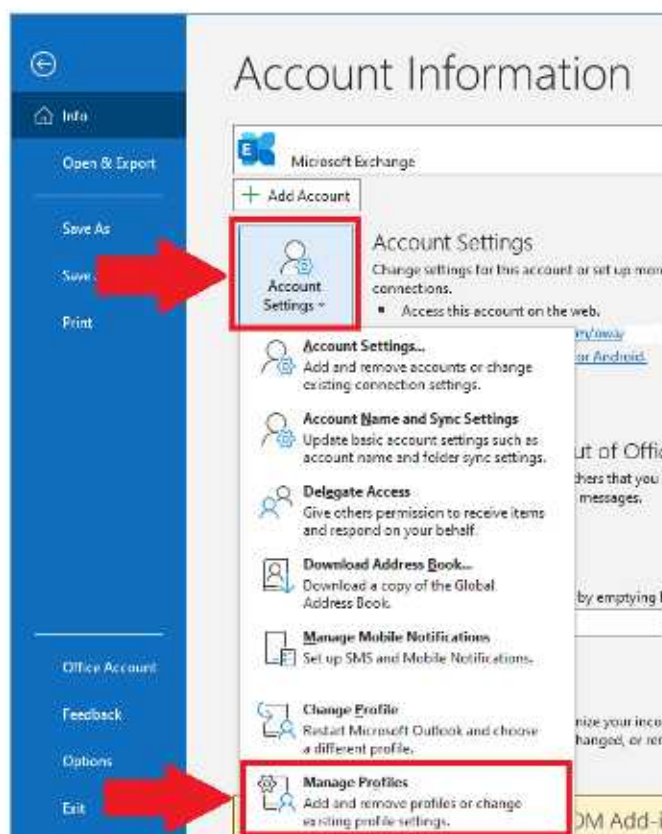
**Office 365 OWA URL: <https://outlook.office365.com>**

# Outlook Configuration for Windows laptops

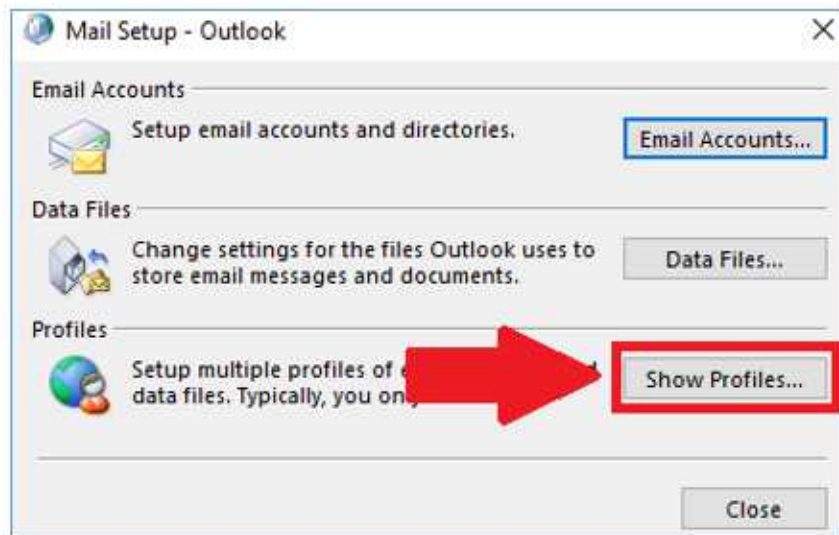
1. Open the Outlook application
2. Click on **File** in the menu bar on the top left as shown in the screenshot below:



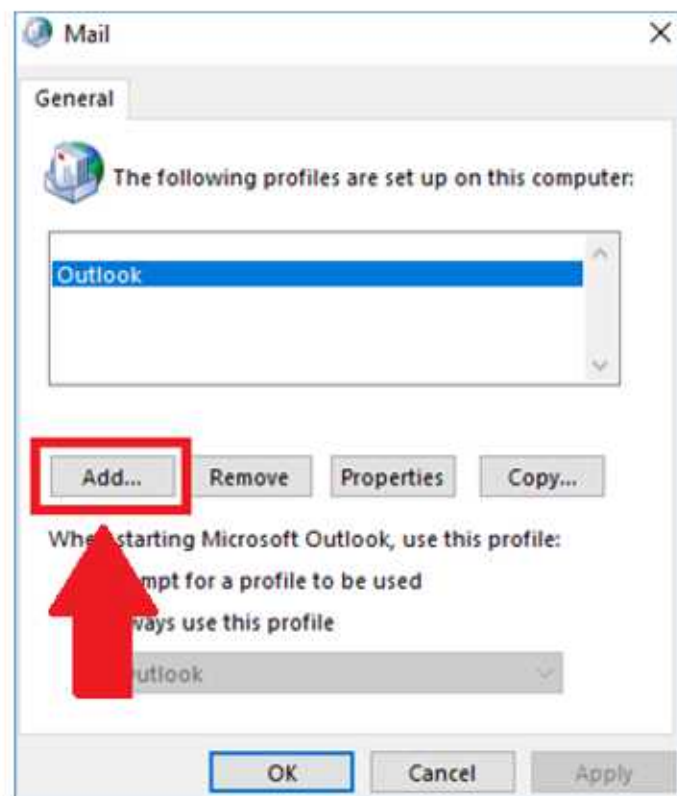
3. Click on the **Account Settings** menu and select **Manage Profiles**



4. Click on **Show Profiles**



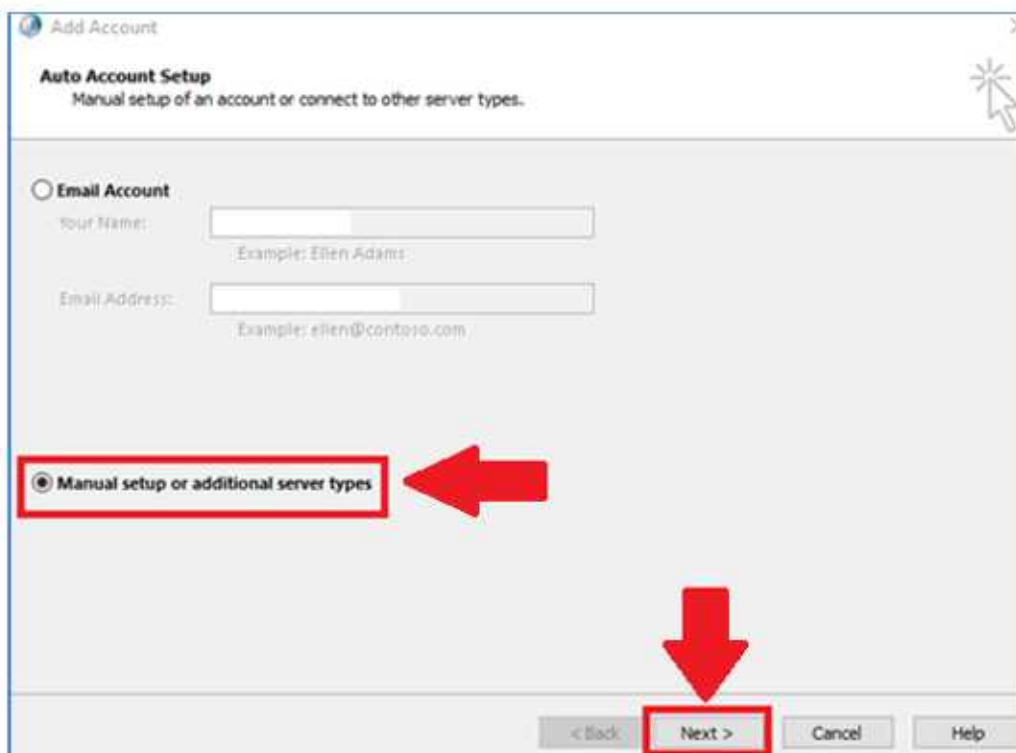
5. On the window that opens, select **Add** to add a new profile



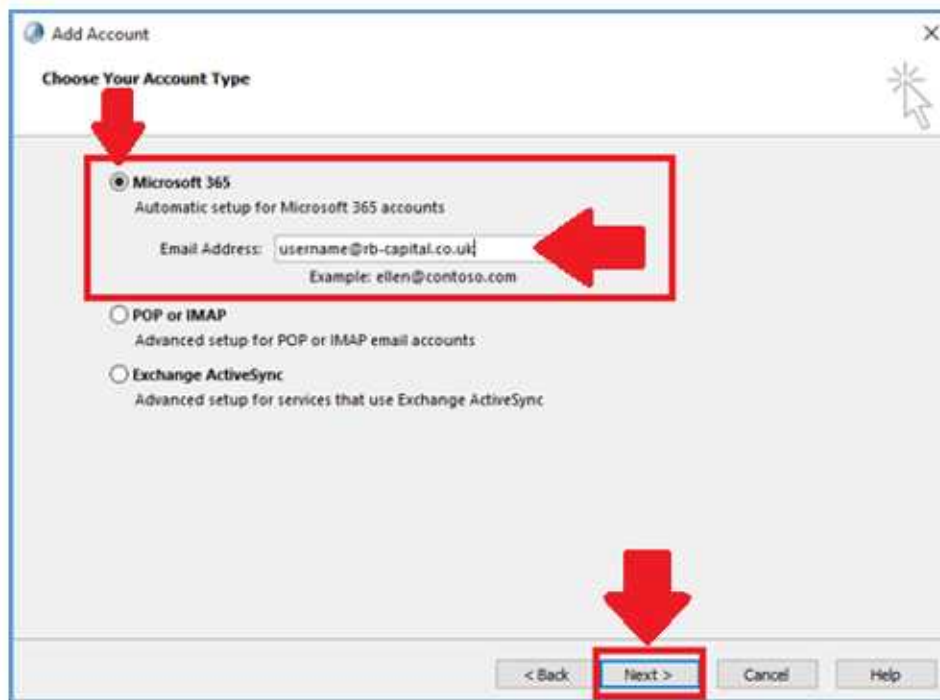
6. Provide a suitable name for the new Outlook profile (such as "Office365") and click on **OK**



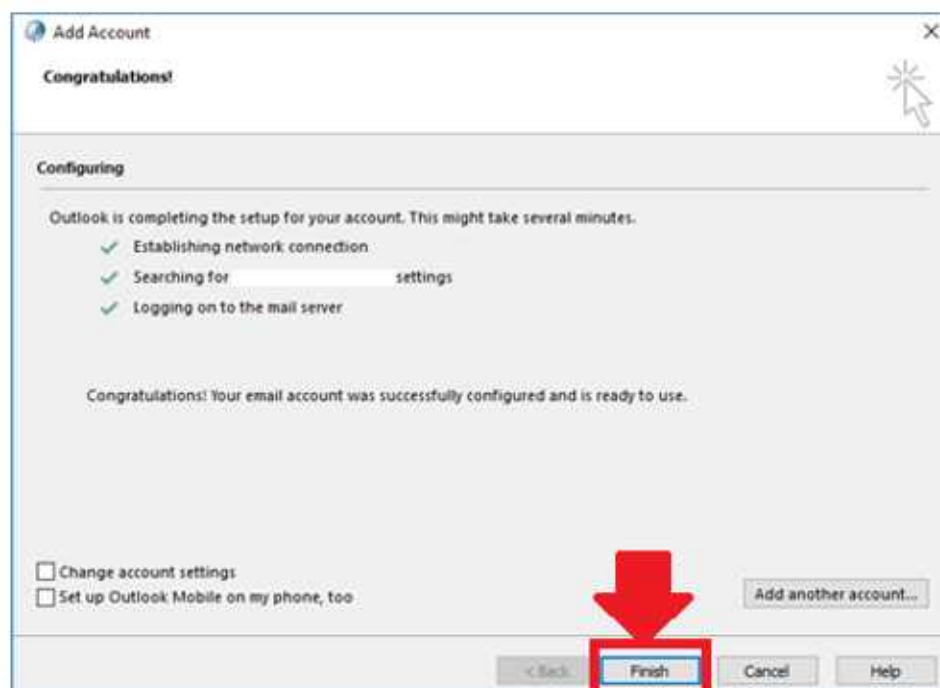
7. A new window should appear to add the new mail account. Here, please select **Manual setup or additional server types** and click on **Next**



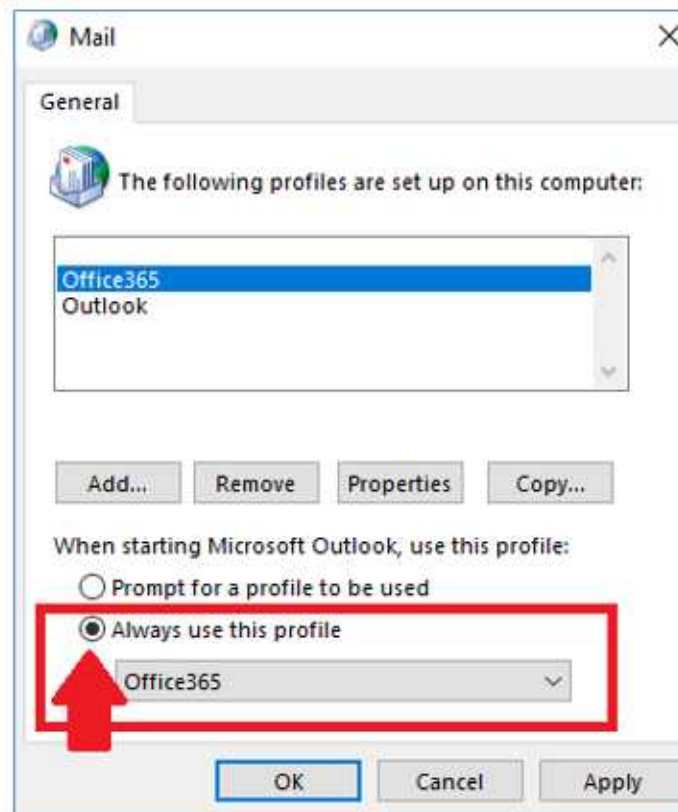
8. On the **Choose Your Account Type** page, select **Microsoft 365**, enter your email address ([username@rb-capital.co.uk](mailto:username@rb-capital.co.uk)) and click **Next**



9. Outlook will complete the setup for your account which might take several minutes. **If you are prompted for credentials, please enter your full email address as your username, and the new password provided to you for your Office365 account.** Once completed, click on **Finish**.



10. Select **Always use this profile**. In the drop-down menu, choose your newly created "Office365" profile, and click on **OK**.



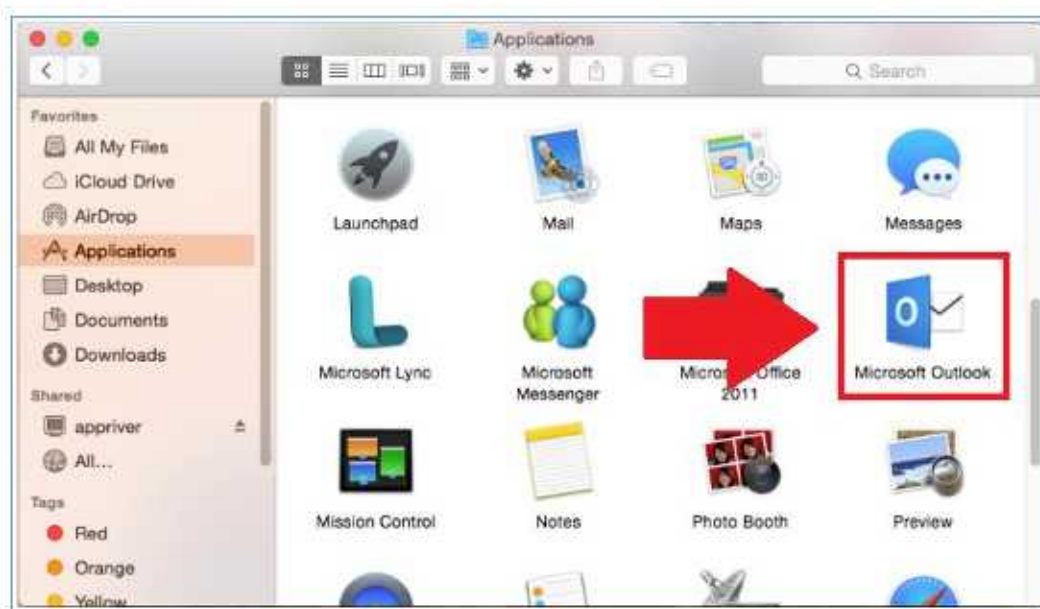
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**Your Windows device is now setup to access your Office 365 mailbox as default with Outlook**

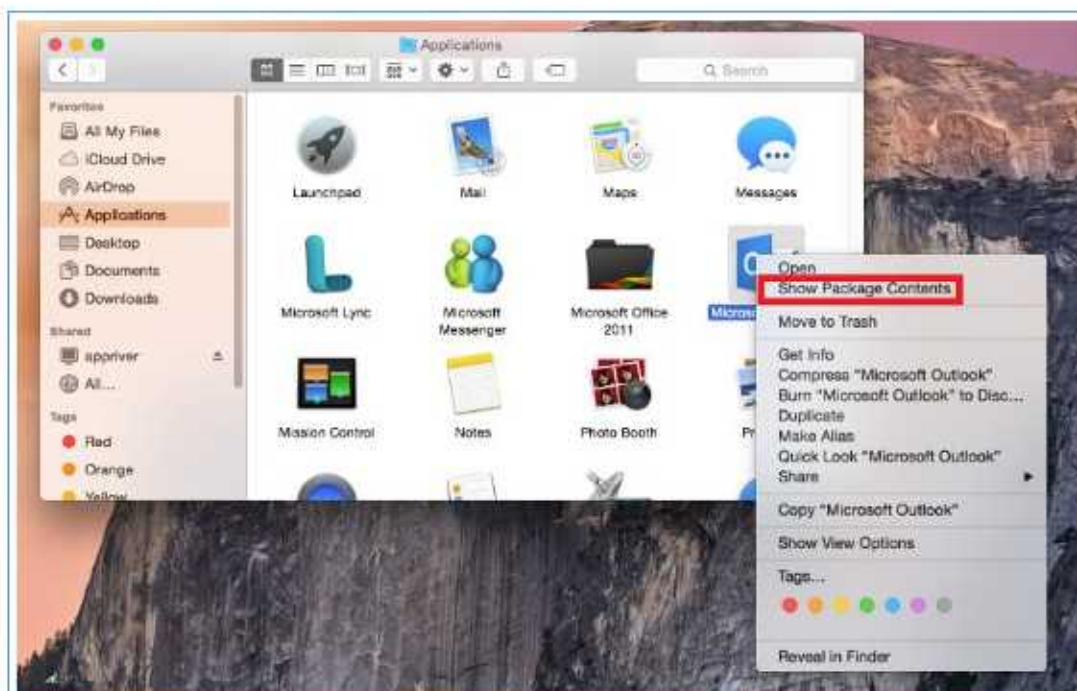
# Outlook Configuration for Mac laptops

## Step 1: Creating a new profile for Outlook

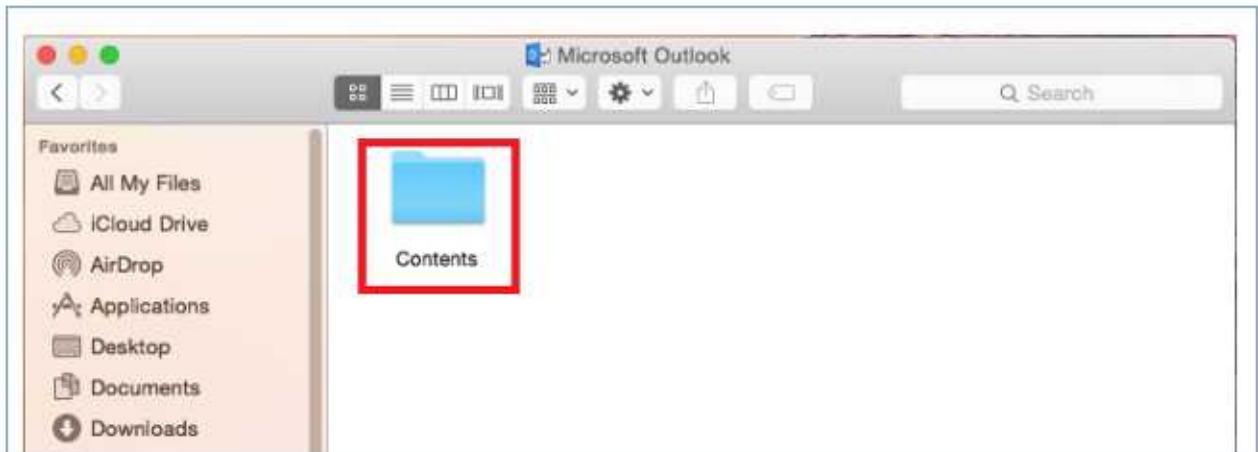
1. Open the **Finder** app, browse to the **Applications** folder, and locate **Microsoft Outlook**



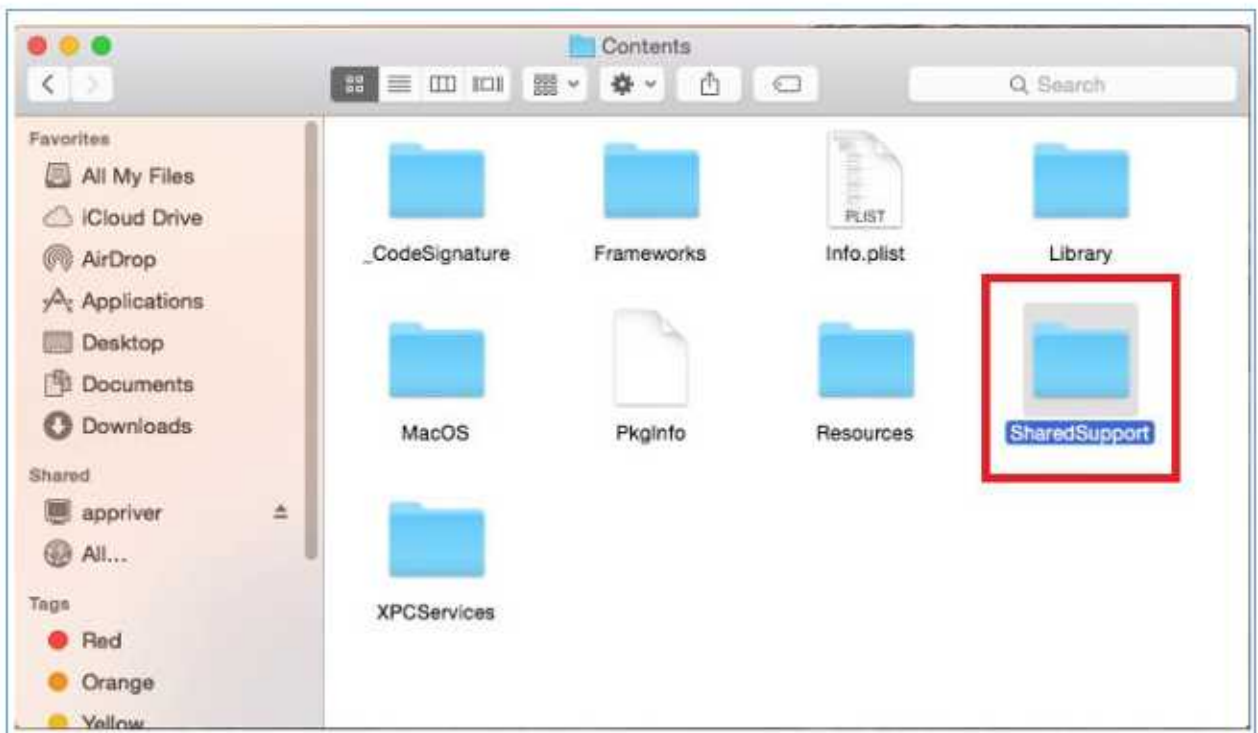
2. Press and hold the **CTRL** key and click on the **Microsoft Outlook** icon to bring up the contextual menu, and Select **Show Package Contents**.



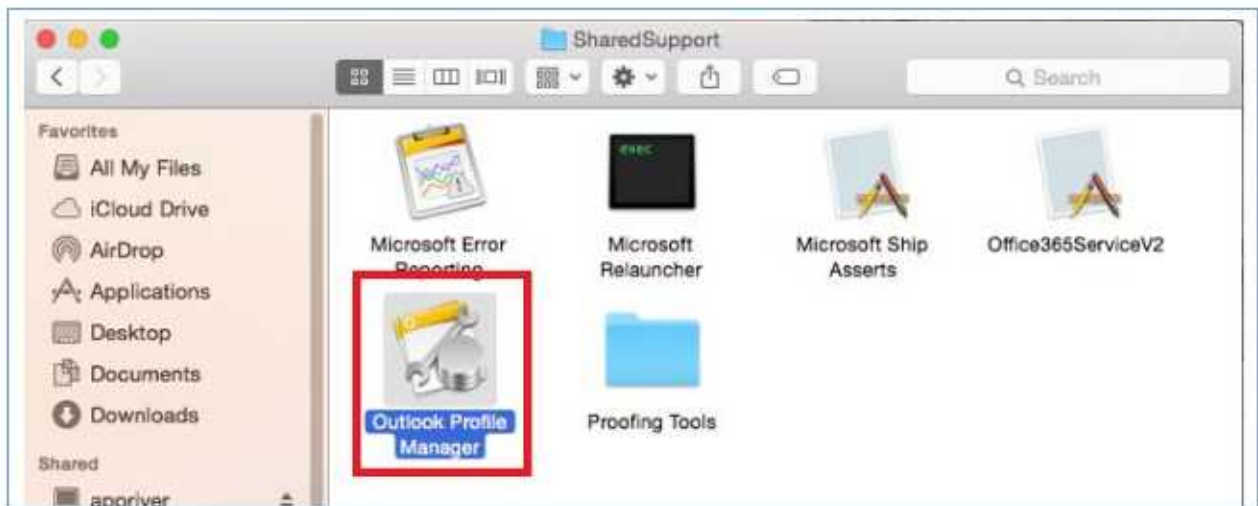
3. Open the **Contents** folder



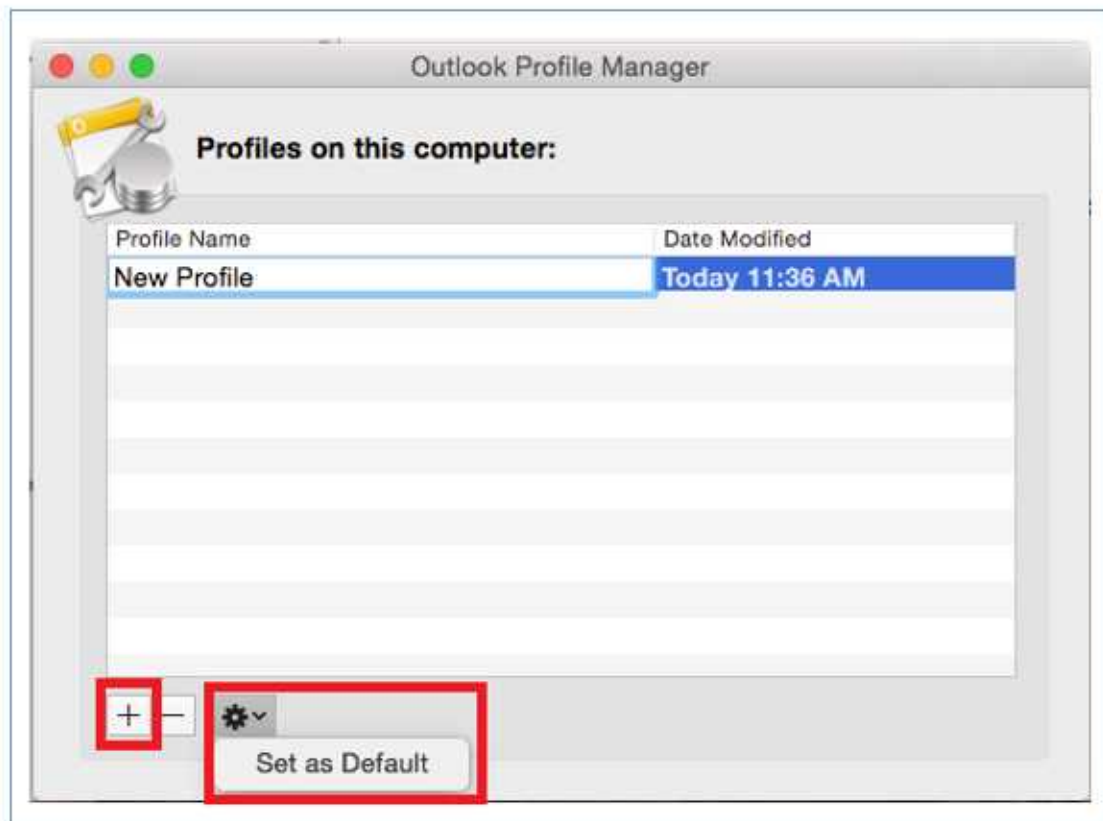
4. Open the **SharedSupport** folder



5. Once in the **SharedSupport** folder, double-click on **Outlook Profile Manager**.



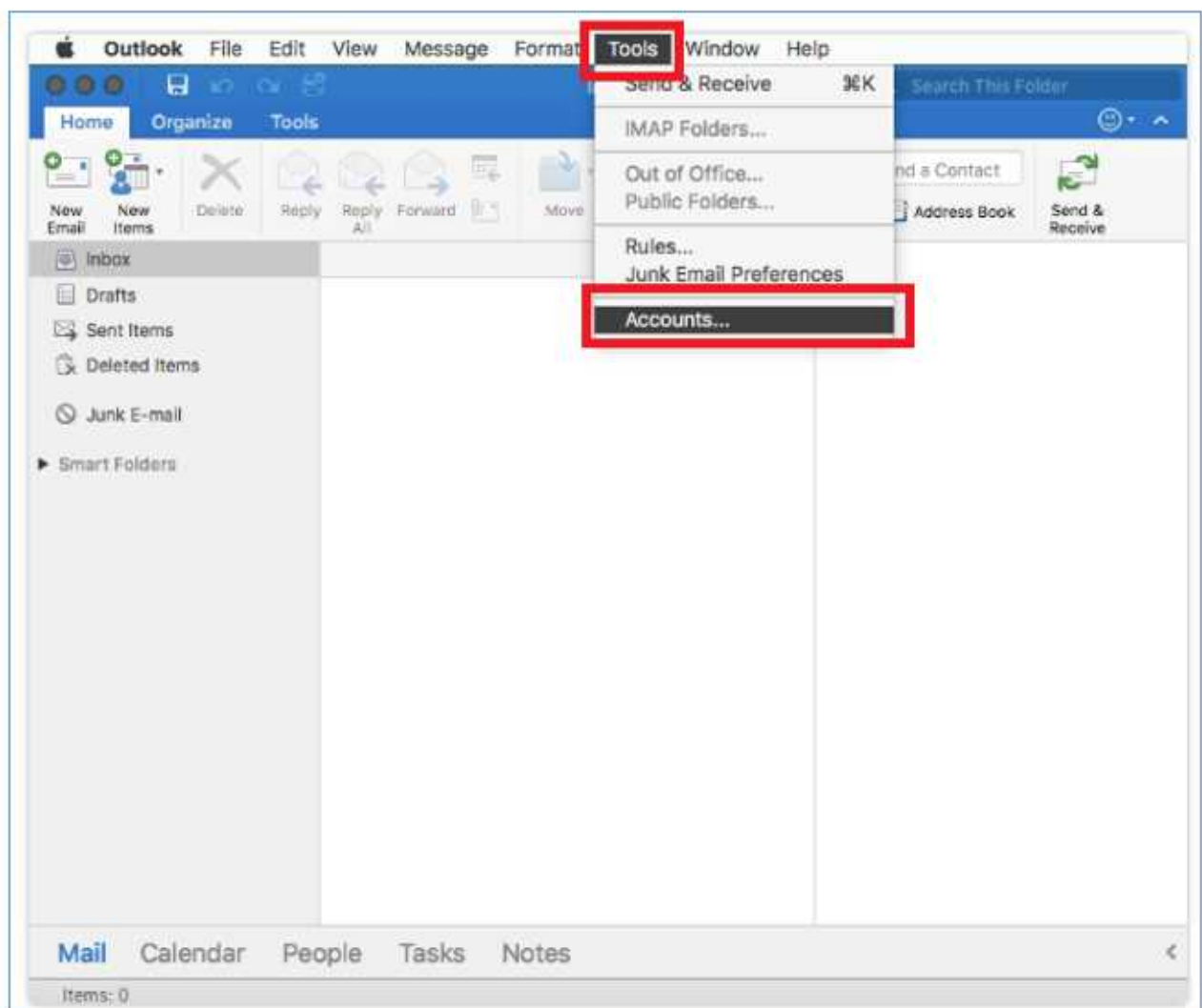
6. In the Outlook Profile Manager window, click the **Add (+)** button and give the profile a name. Then select the **gear icon** and select **Set as Default**.



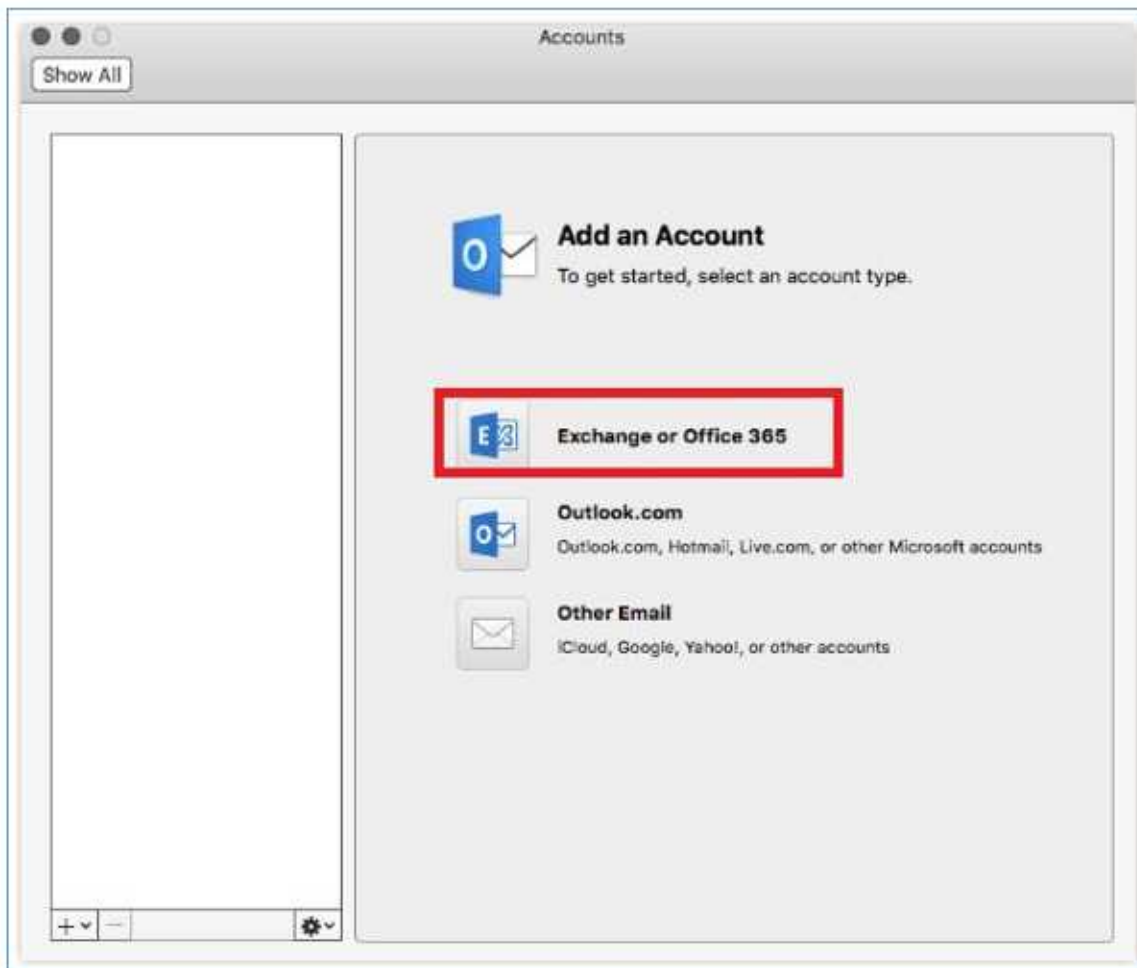
You can now close out of the Outlook Profile manager and proceed to Step 2.

Step 2: Configure your Office 365 account with the new Outlook profile you just created

1. Open the **Outlook** application
2. Outlook will now appear empty with your new default profile until you add your Account.  
To do that, click on **Tools > Accounts**



3. Select **Exchange or Office 365**



4. On the account information page, choose **Method** as **"User Name and Password"** and then enter your email address ([username@rb-capital.co.uk](mailto:username@rb-capital.co.uk)) for the **"Email Address"** as well as for the **"User Name"** fields. Enter the password for your new Office 365 account. Make sure that **Configure Automatically** is selected.

Enter your Exchange account information.

E-mail address:

Authentication

Method:

User name:

Password:

Configure automatically

5. Click on **Add Account**.
6. Click on **Always Allow** or **Continue** for any popup messages that you receive regarding the server to configure your account, or secure connection with server.

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**Your device is now setup to access your Office 365 mailbox as default profile with Outlook for Mac**


# Outlook Configuration for Android Devices

Step 1: Download the Outlook for Android application (if not already present)


1. You can download the **Outlook for Android** app using ANY the following ways:
  - a. Open **Play Store** and search for "Outlook".  
Download and Install the **Microsoft Outlook** app
  - b. Alternately open this link in a browser on your mobile device. It will redirect you to the **Play Store** and open the Microsoft Outlook app. Click on **Install**.  
<https://app.adjust.com/xzzdub>

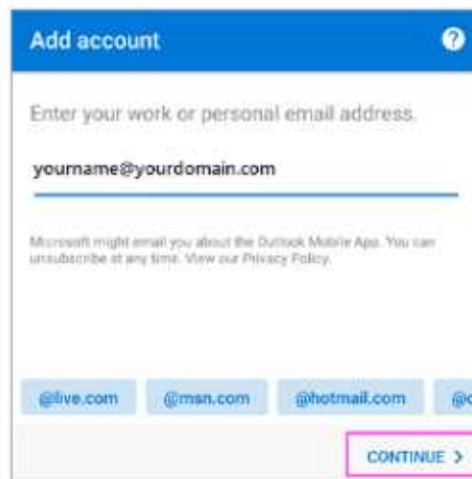


Step 2: Delete your old email account (if already configured for the old mailbox)

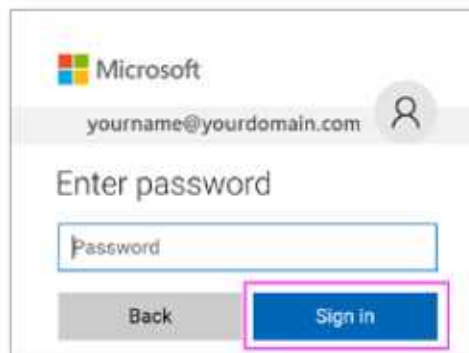
1. Open the **Outlook for Android** app. The icon looks like → 
2. Open the **Menu** and tap **Settings**
3. On the settings page, select your account that was the old email account, and then tap **Delete Account**

### Step 3: Add the new email account for Office 365

1. Open the **Outlook for Android** app. The icon looks like → 
2.
  - a. If it is your first time using this application, tap **Get Started**
  - b. Otherwise, open the **Menu** and tap **Settings > Add Account > Add Email Account**
3. Enter your email address ([username@rb-capital.co.uk](mailto:username@rb-capital.co.uk)) and then tap **Continue**



4. Enter the new password provided to you for Office 365 and then tap **Sign In**



5. If any Outlook User Agreement or Outlook Device Policy page appears, go through the information, and then click on **Activate** (or) **Accept**.
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**Your Android device is now setup to access your Office 365 mailbox.**




# Outlook Configuration for iOS Devices

Step 1: Download the Outlook for iOS application (if not already present)


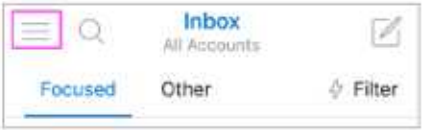

1. You can download the **Outlook for iOS** app using ANY the following ways:
  - a. Open **Apple Store** and search for "Outlook".  
Download and Install the **Microsoft Outlook** app
  - b. Alternately open this link in a browser on your mobile device. It will redirect you to the **Apple Store** and open the Microsoft Outlook app. Tap on **Get**.  
<https://app.adjust.com/xzzdub>

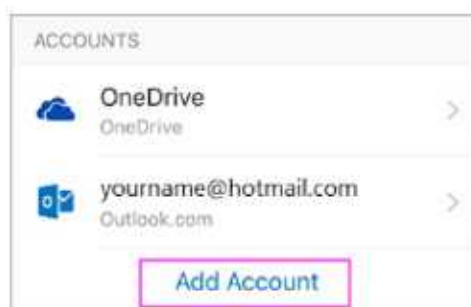


## Step 2: Delete your old email account (if already configured for the old account)

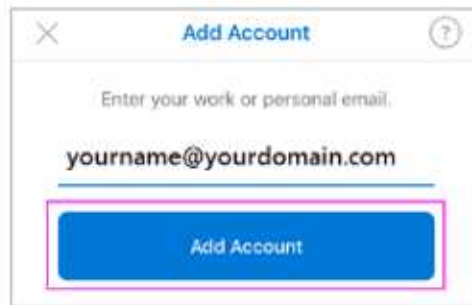
1. Open the **Outlook for iOS** app. The icon looks like → 
2. Tap the menu icon in the upper left → 
3. Tap the **Settings** icon 
4. On the settings page, select your account that was the old email account, and then tap **Delete Account**

## Step 3: Add the new email account for Office 365

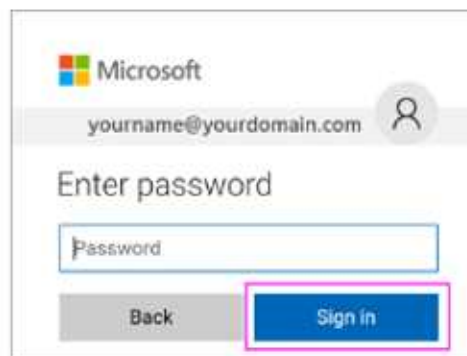
1. Open the **Outlook for iOS** app. The icon looks like → 
2.
  - a. If it is the first time using this application, tap **Getting Started**
  - b. Otherwise, tap the menu icon in the upper left → 
  - c. Tap **Settings**  > **Add Account** > **Add Email Account**



3. Enter your email address ([username@rb-capital.co.uk](mailto:username@rb-capital.co.uk)) and then tap **Add Account**



4. Enter the new password provided to you for Office 365 and then tap **Sign In**



5. Tap **Yes** (or) **Allow** to give Outlook permission to sync calendar, contacts, etc.



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**Your iOS device is now setup to access your Office 365 mailbox.**