Shared Mailboxes/Email Alias: Instructions for Units

What is a Shared Mailbox/Email Alias?

A shared mailbox allows multiple individuals to access the same mailbox, including its mail folders and messages sent to or from the email alias. Any action taken by one member (like deleting a folder or message) will affect all members of the shared mailbox. A shared mailbox with an email alias is often used as a unit's contact mailbox (e.g., request more information about a program). A shared mailbox may also be used to provide access to messages rather than forwarding them (e.g., sharing certain emails from a departing employee to new employee).

Request a Shared Mailbox and Email Alias

Please submit an [ITS Service Request ticket](#) to obtain a shared mailbox and its email alias. Include the following information (as illustrated in the example below):

1. Display Name: **Penn State Harrisburg ITS**
   a. With shared display names spaces are permitted.
2. Email Alias: **hbgit@psu.edu**
   a. Prefix 4 to 16 characters in length before @ sign.
3. Send-As Rights: **Yes**
   a. Allows messages to be sent FROM the alias, rather than from a personal email address.
4. Full-Access Rights: **Yes**
   a. Allows all members to access folders and messages in the shared mailbox.
5. Members: **Jane Doe (abc123@psu.edu), John Doe (xyz123@psu.edu)**
   a. Include the name and email address for each member.

Penn State Harrisburg ITS will forward your ticket to U.P. IT so that the shared mailbox/email alias can be created.

Once U.P. completes the configuration of the shared mailbox, you will need to follow the instructions (given later in this document) to access your shared mailbox and to test the email alias. The instructions vary depending upon whether you use the desktop or web version of Outlook. After you are successful in accessing and testing your shared mailbox, please forward these instructions to the other members.

Example of a Shared Mailbox

Below is an example of a shared mailbox in the desktop version of Outlook. (The web version is similar.) When you open the shared mailbox "**Penn State Harrisburg ITS**" from the folder pane on the left, it lists all the mail folders beneath it.
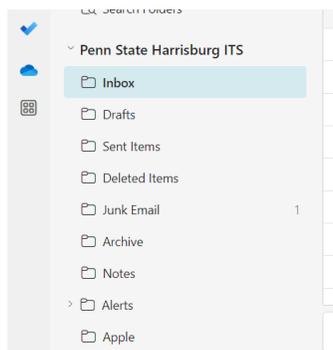
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Overview of Process

- After the mailbox has been created by U.P., it can take 1 to 3 hours (or longer) before it is available throughout the system.
- Once created, the shared mailbox will **automatically appear** in the Folders pane (located on the left) and near the bottom of the pane in the **desktop version of Outlook**. You must **manually add the shared mailbox** if you are using the **online version of Outlook or the desktop version on a Mac**.
- The name of the shared mailbox is the common name that you requested in the ticket.
  Example: **Penn State Harrisburg ITS**
- To expand the folder for the shared mailbox, click the arrow next to it.
- Messages sent/received from the associated email alias (e.g. **Hbgit@psu.edu**) appear in the shared mailbox.
- **IMPORTANT:** Test the shared mailbox. This includes sending messages TO and FROM the email alias. If there are issues, please provide details in the existing IT ticket.
- After it has been verified that the email alias works properly, you can now make the alias public.

See the next page to learn how to access and use your shared mailbox and email alias.

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Step 1: Find Your Shared Mailbox

Follow the instructions below to access your shared mailbox from the desired application.

Outlook (desktop/client version)
1. Close the desktop version of Outlook.
2. Re-open the desktop version of Outlook.
3. If needed, click on the **Mail icon**.
4. In the Folder pane on the left, scroll down towards the bottom until you see your shared mailbox.
   - Your shared mailbox (e.g. **Penn State Harrisburg ITS**) will be listed after the Groups section.
5. To open the shared mailbox, click the arrow next to the name.
   - You are now viewing the folders and mail for the shared mailbox.
   - Here are more details for the [desktop version](#).

Outlook (web version)
1. Login to https://office365.psu.edu.
2. Open Outlook.
3. In the left navigation pane, right-click on **Folders** and select: **Add shared folder**.
4. In the **Add shared folder** dialog box, type the name of the shared mailbox (or email address) and select: **Add**.
   - For more details, see this [article on shared mailboxes using the web version](#) of Outlook.

Alternative Method: Open Shared Mailbox in New Window
1. Go to https://office365.psu.edu and login to Outlook.
2. Click on your profile icon in the upper right side of the screen and select: **Open Another Mailbox**.
3. In the search box, type the name of the shared mailbox (e.g. **Penn State Harrisburg ITS**) and then click on the name.
4. Click the **Open button**.
   - You are now viewing the folders and the In mailbox for the shared mailbox.
   - Here are more details for the [web version](#).

Additional Notes for Web Version
- You can directly access the shared by using its URL.
- Format: [https://outlook.office.com/mail/*yoursharedmailboxname*@psu.edu/](https://outlook.office.com/mail/)
- The URL is the same as the name of the mailbox, but without any spaces.
- However, if you requested an email alias that's different from the name, then use the alias for the URL. Example: "**Penn State Harrisburg ITS**" (shared mailbox name) has an email alias of hbgit**@psu.edu**. Use this URL to access the shared mailbox: https://outlook.office.com/mail/ **hbgit@psu.edu**.

Outlook Mobile App
1. Install the Outlook Mobile app on your phone.
2. Follow these instructions for adding a shared mailbox using the [mobile app](#).

Step 2: Test the Email Alias

Please test the email alias to make sure that:

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- Designated faculty/staff receive the email.
- Mail is stored in the In and Sent folders of the shared mailbox.

How to Test
1. Have someone that's not a member of the shared mailbox send an email message to the shared mailbox/alias.
   a. Verify that all members received the message and that it arrived in the shared mailbox's "In" folder.
2. Test to see if you can send messages from the email alias. To do so:

   Outlook (desktop version):
   a. Create a new message.
   b. Click on the **From button** and select: **Other Email Address**.
      - ✋ If you don't see the **From button**: From the menu at the top, select: **Options**. From the "Show Fields" section, select: **From**.
   c. In the From box, **type the email alias** and click **OK**.
   d. Type a message and send the email.
   e. **Check to see if the recipient received the message.** When the recipient views the message, they should see the name of the shared mailbox or its email address in the From field.

   Outlook (web version):
   a. Create a new message.
   b. Click on the **From button** and select: **Other Email Address**.
      - ✋ If you don't see the **From button**: From the menu at the top, click: **Settings**. From the "Settings" pane, select: **View All Outlook Settings**. At the left, select the category: **Compose and Reply**. Under the "Message Format" section, place a checkmark in the box for: **Always Shown From**. Close the window.
   c. Type the name of shared mailbox (or the email alias). From the pop-up menu, select the shared mailbox name or its email address. (The From field should no longer have your personal email address.)
      - ✋ The next time you compose an email and click the **From button**, it will remember the email address and you can select it from the pop-up menu.
   d. Type a message and send the email.
   e. **Check to see if the recipient received the message.** When the recipient views the message, they should see the name of the shared mailbox or its email address in the From field.

Notes:
- If "From" doesn't work, see the instructions: [Shared Mailbox: Send-As Rights](#).
- Email messages are stored in the "In" and "Sent" folders of the shared mailbox. This is where you and the other members of the shared mailbox should look for messages.
- If someone can't see the messages that others have sent, then a ticket must be submitted to U.P. (It's most likely because the "Save Sent Emails" setting wasn't turned on by U.P.) Once the "Save Sent Emails" setting is on, all future emails sent to the mailbox will be located in the Sent folder of the shared mailbox.

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Shared Mailbox: Send-As Rights

You can also do the following to ensure the send-as rights work properly from Outlook (desktop version):

1. Open Outlook (desktop).

2. From the menu at the top, click the **Send/Receive** tab.

3. Click on **Send/Receive Groups.**

4. Select **Download Address Book**.
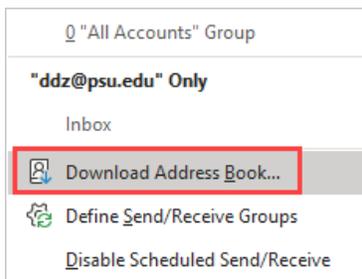
5. **UNCHECK** the box "Download changes since last Send/Receive".

6. Click **OK**.