

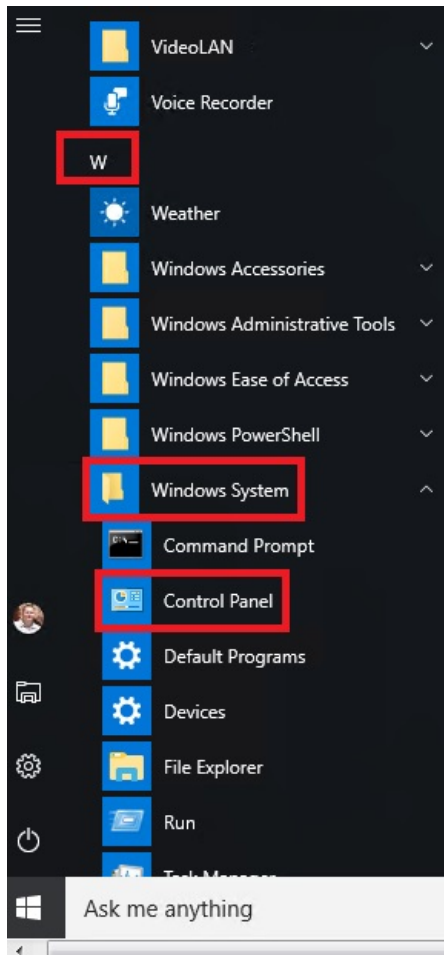
This guide is for any Bankers Life agent or manager who does not have a company-owned Bankers computer. Outlook Anywhere allows you to use Microsoft Outlook 2016 to connect to the Bankers Life Exchange server from remote locations without the need to connect to the Bankers corporate VPN. You can also/alternatively, use Outlook Web Access by logging in at <https://owa.bankerslife.com>.

NOTE: We strongly recommend that the configuration is performed in your branch office. By using this guide, you also assume all risk of any lost personal data/configuration. Finally, Bankers will not provide any additional technical support for this connection method outside of this guide.

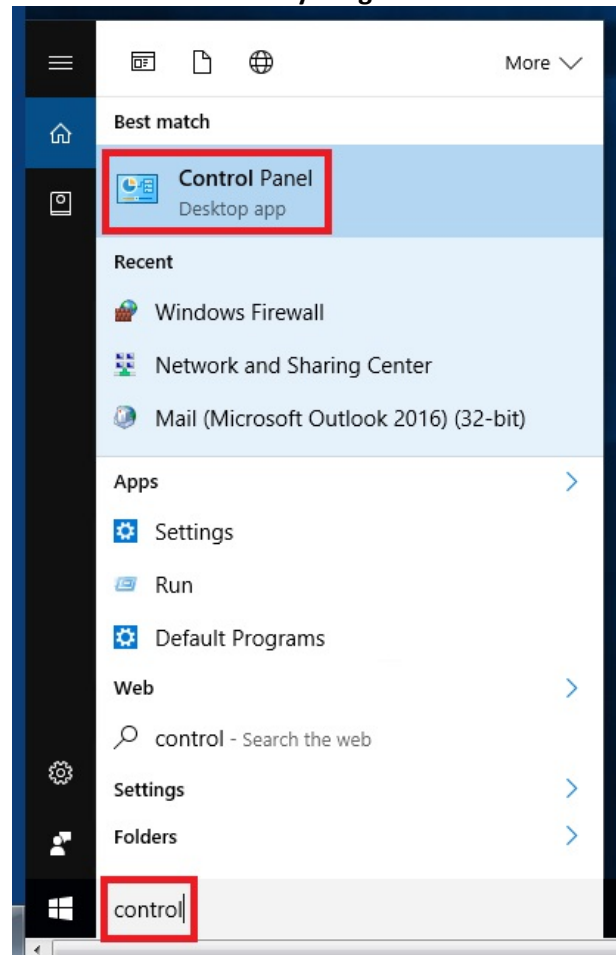
CONFIGURATION OF OUTLOOK 2016

1. Click on Start and scroll down to the W heading and select Windows System | Control Panel. You can also type control in the Cortana “Ask me anything” box and click Control Panel.

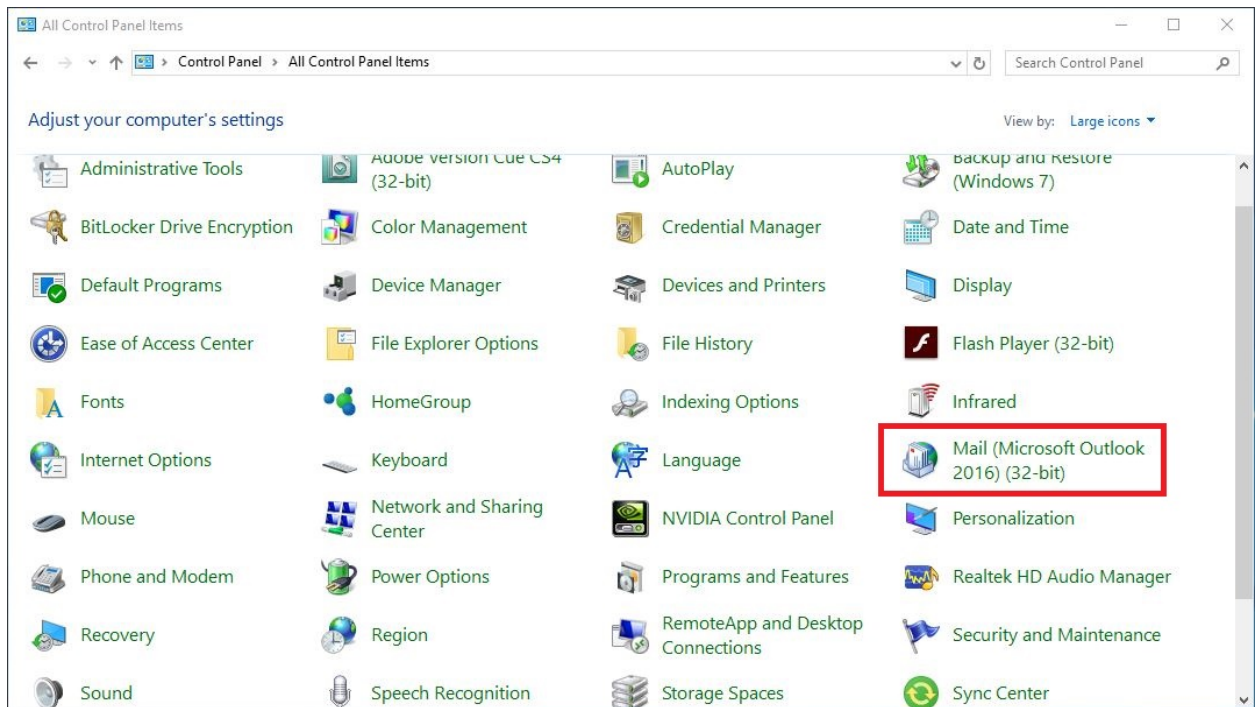
Via Start Menu:



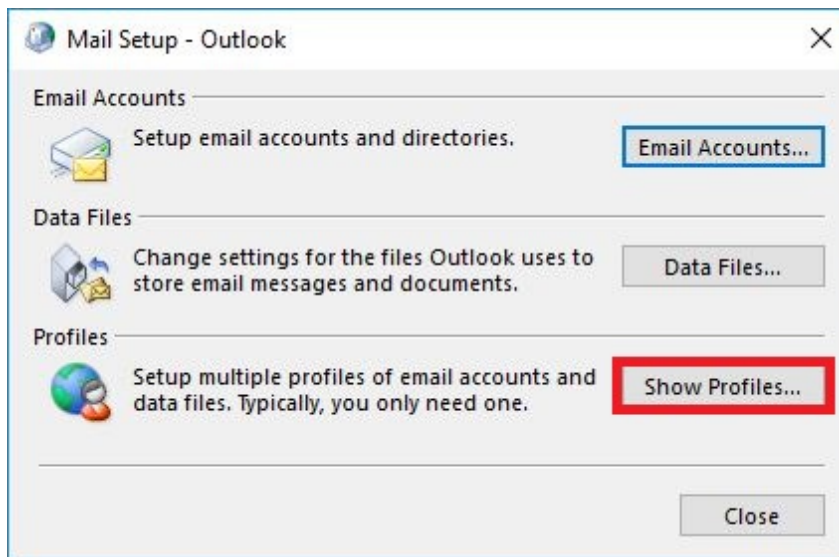
Via Cortana “Ask me anything” box:



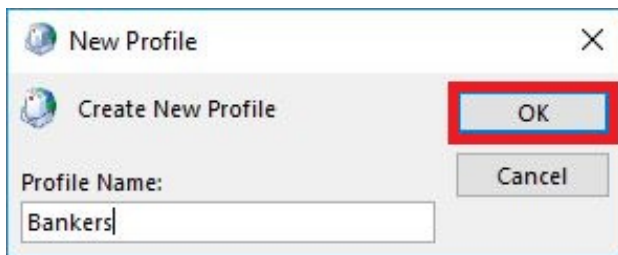
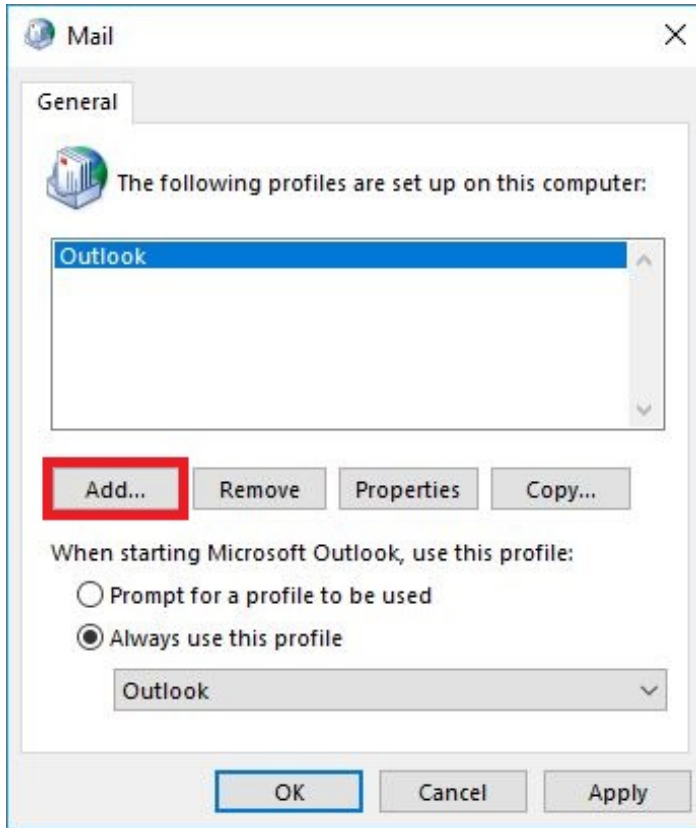
2. Once in the Control Panel, select the Mail icon as shown in the screenshot below. If your Control Panel is set to Category view, you can change it by selecting Large or Small icons from the "View by" dropdown shown in the top right hand corner of the screenshot below.



3. If you already have an Outlook mail profile setup you'll be taken to a screen similar to the screenshot below. Click on the Show Profiles button. (If your computer does not have a mail profile setup you'll be automatically taken to the Show Profiles option in Step 4.)



- You will now be presented with a screen similar to the first screenshot below. Click Add and then you will be prompted with a dialog box to name the profile similar to the second screenshot below. Give the profile an appropriate name and then click OK.



- You will now be prompted with the Add Account dialog. Enter your desired Outlook display name and your @bankerslife.com email address and click Next. **NOTE: DO NOT enter your password in this dialog box as it will cause issues with the remainder of the configuration.**

Add Account ✕

Auto Account Setup
Outlook can automatically configure many email accounts.

Email Account

Your Name:
Example: Ellen Adams

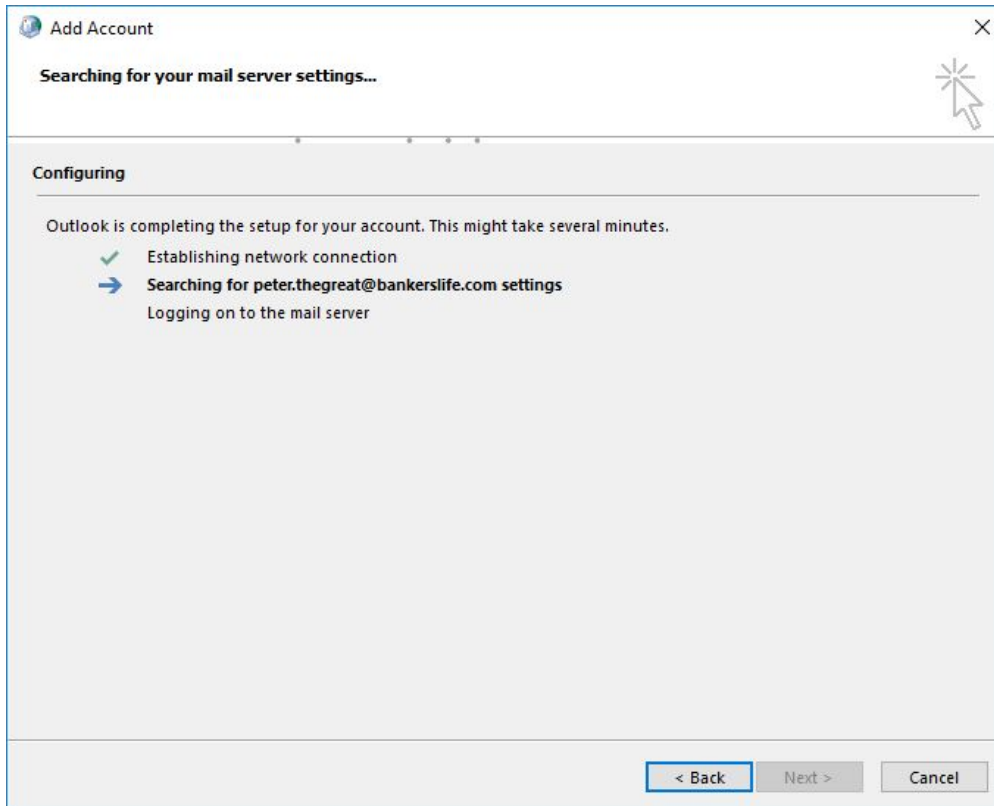
Email Address:
Example: ellen@contoso.com

Password:

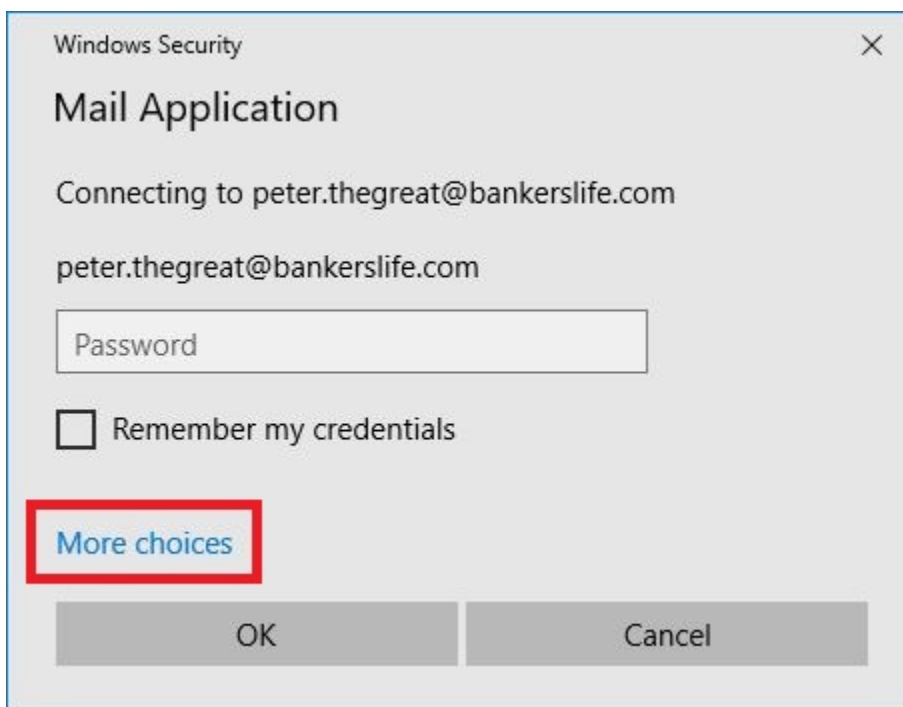
Retype Password:
Type the password your Internet service provider has given you.

Manual setup or additional server types

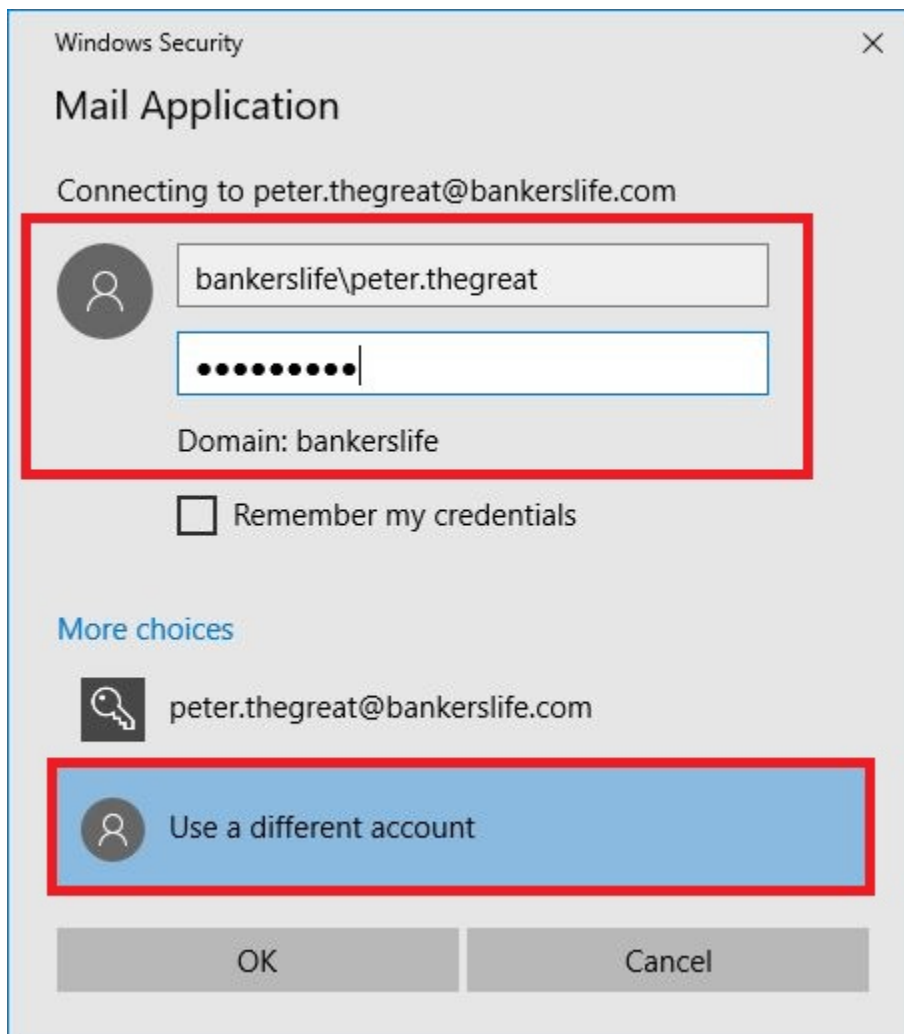
6. You should now get a “Searching for your mail server settings...” dialog box as seen in the screenshot below:



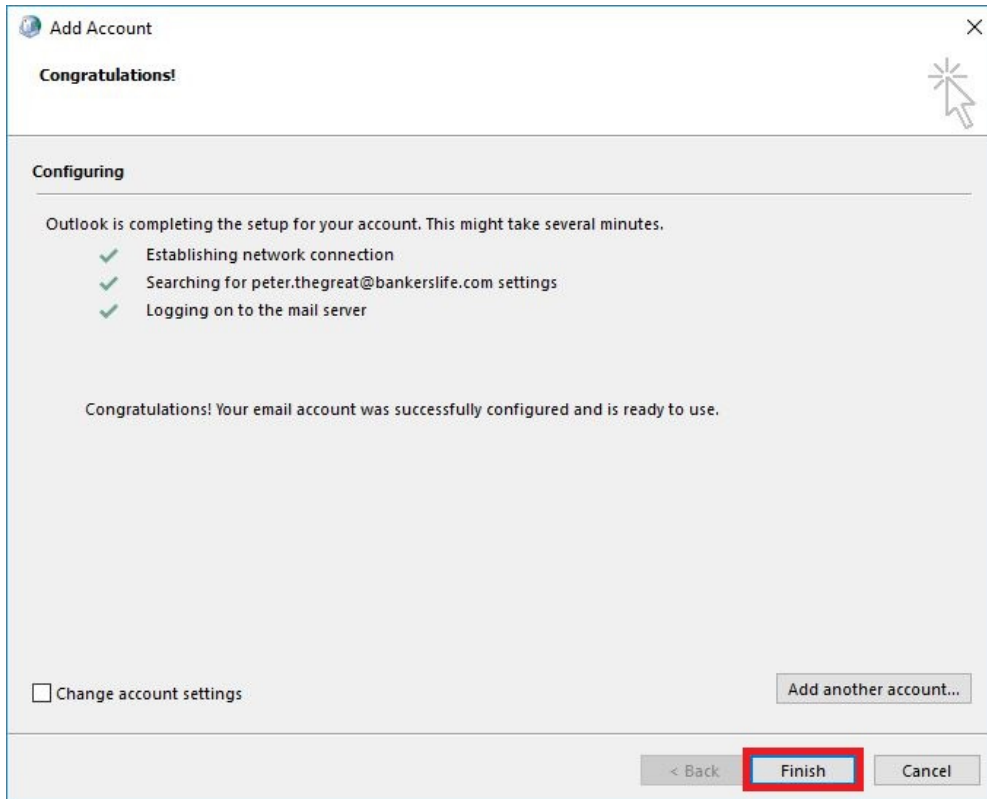
Shortly after seeing the searching screen, you should now be prompted for credentials as shown in the below screenshot. Click on “More Choices” here so we can authenticate your credentials against the domain.



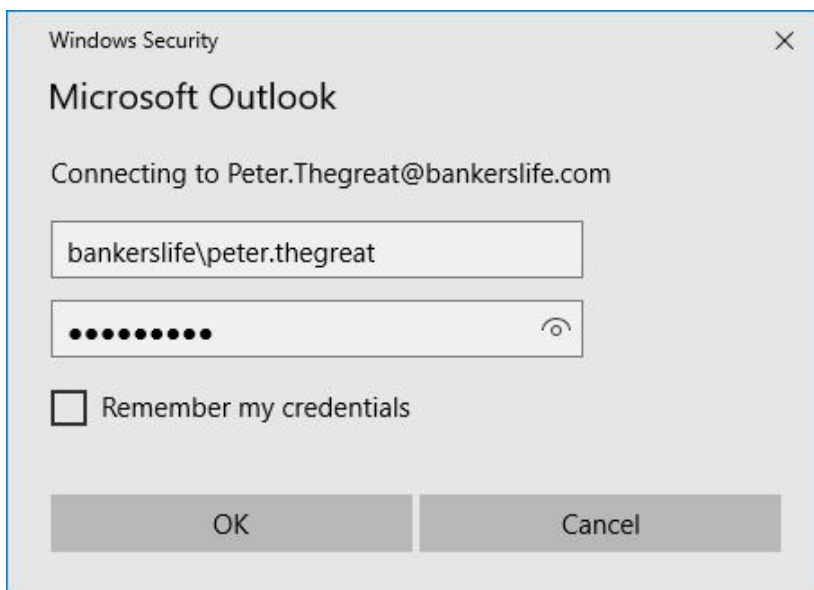
7. Once you clicked “More Choices,” the dialog box should now show the options as seen below. First, click on “Use a different account” and then enter your Bankers domain credentials. Your username should be entered as “bankerslife\first.last” along with your current password. **NOTE: DO NOT check the “Remember my credentials” box here as it could potentially cause account lockout problems as multiple Bankers systems use these credentials. We cannot provide support for troubleshooting lockout issues on personal equipment.**



8. That's it! If your credentials are successful, you will see a “Congratulations” screen as shown below. You should now be able to launch and use Outlook 2016.



When you launch Outlook, you will be prompted to sign in. You will need to enter your credentials as shown below. **NOTE: DO NOT check the "Remember my credentials" box here as it could potentially cause account lockout problems as multiple Bankers systems use these credentials. We cannot provide support for troubleshooting lockout issues on personal equipment.**

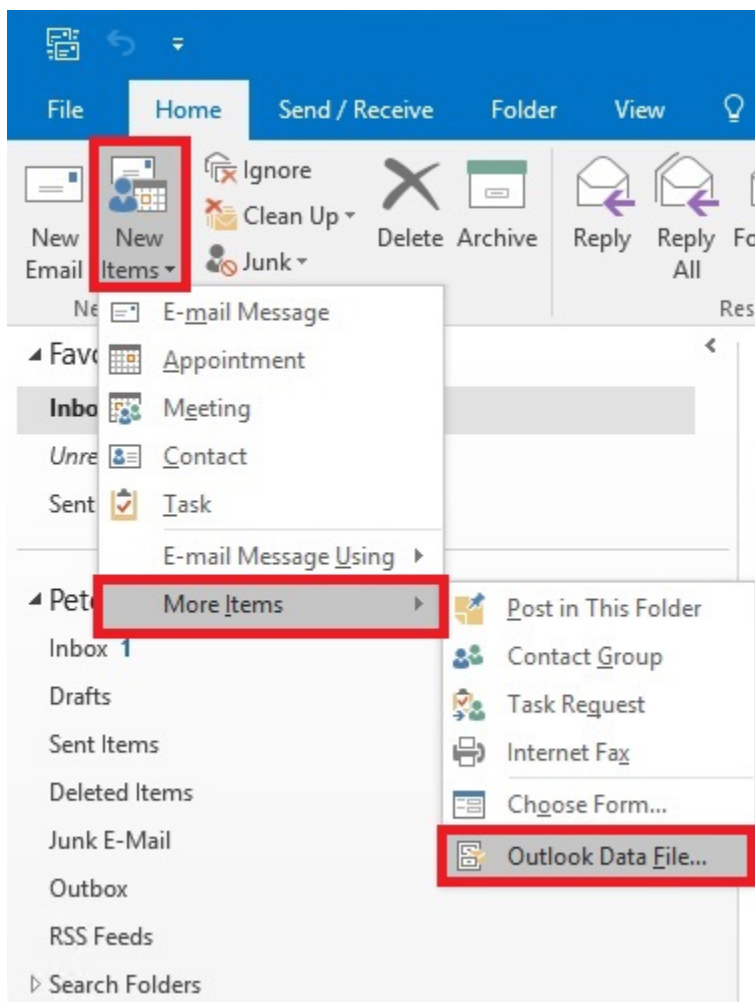


CREATION OF PERSONAL FOLDERS

The following steps will walk you through how to add a set of Personal Folders to your mailbox. Personal Folders allow you to categorize and store your email offline. All emails stored in your PST will be saved indefinitely and not subject to the corporate email retention policy.

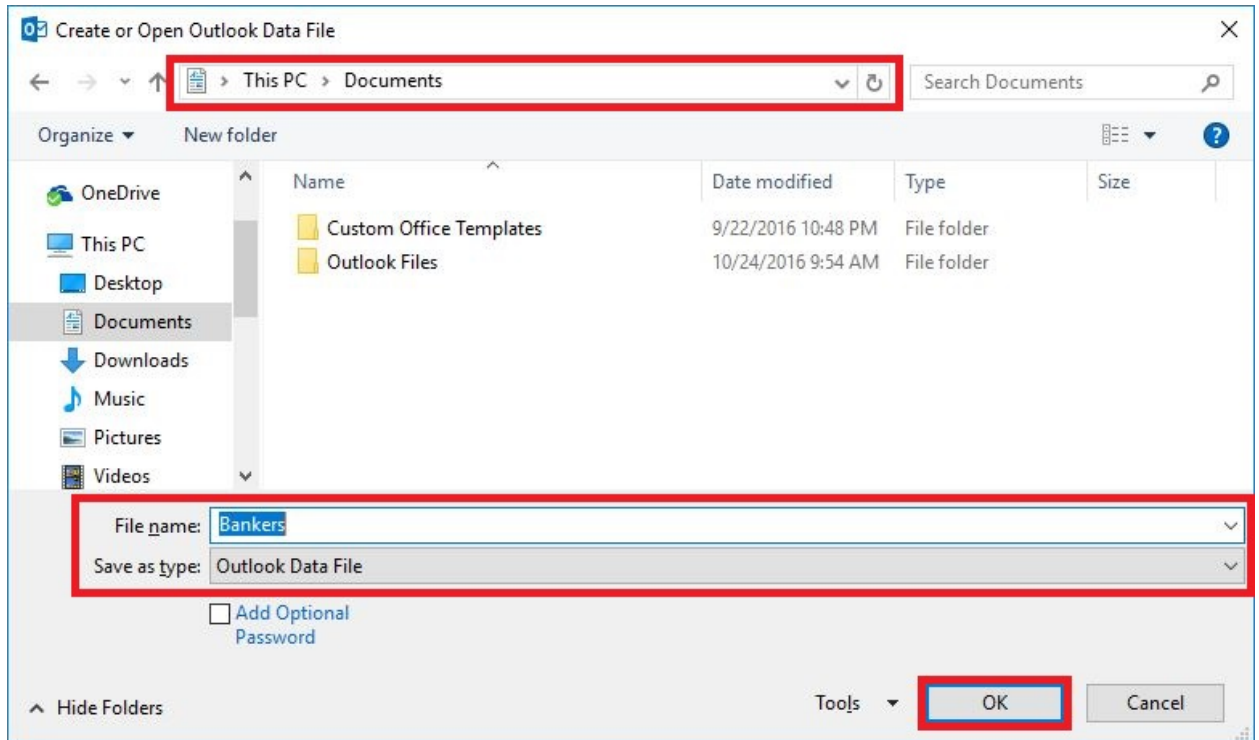
NOTE: You will need to back up your Personal Folders as the PST is stored on the hard drive on your computer. Additionally, your Personal Folders are only accessible from the computer where they are located.

1. Open Outlook. Using the screenshot below as a guide, click on the New Items button on the Home ribbon. From the first dropdown select More Items and then select Outlook Data File.



2. Next, you will be prompted with the Create of Open Outlook Data File dialog as shown in the screenshot below. Navigate to the location where you wish to save the PST. Once there, type in the file name and click OK.

NOTE: It is important that you note where you saved your PST so you can back it up as mentioned above. If you notice in the screenshot, there is an “Add Optional Password” checkbox. We recommend against the use of setting a password because if you forget the password, you would likely need to use a third-party service or software to retrieve it.



3. That's it! You will now notice the Personal Folders in the left hand column. The list is initially alphabetized but you can drag and drop them to suit your location preference.

CAN I USE THIS GUIDE TO CONFIGURE OUTLOOK IN OFFICE365?

Unfortunately, we do not have the ability to test this nor do we provide support for Office365. If you have an Office 365 Home, Personal, or University subscription, you are entitled to download Microsoft Office 2016. More information on that can be found at the link below:

https://support.office.com/en-us/article/How-do-I-get-Office-2016-ee68f6cf-422f-464a-82ec-385f65391350#BK_upgradesub