

# **Email Account Setup SOP:**

## **Purpose:**

The purpose of this SOP is to provide guidelines for setting up a new email account for a new hire to ensure users are able to send secure, electronic communications.

## **Authorship:**

This SOP was written by David Renteria.

## **Scope:**

This SOP applies to all new hires – volunteer, part time, and full time – who require email accounts for work-related purposes.

## **Responsibilities:**

The following personnel are responsible for implementing this SOP:

1. HR department – requesting the setup of email accounts
2. IT dept/contractors – procure, install, create, and configure the email account

## **Prerequisites:**

Prior to setting up email accounts, the following tasks must be complete:

1. The necessary software – Thunderbird – must be installed.
2. The new user's account has been created in the company's system/domain.
3. The new user's role & responsibilities have been clearly defined.
4. The new user has been informed about the company's IT policies and procedures and has signed the AUP.

## **Procedure:**

1. Install Thunderbird email client and create a desktop shortcut (if not already done).
2. Create or retrieve user's MS Outlook email information from HR
3. Deploy the email account to Thunderbird
  - a. Incoming (IMAP)
    - i. Server name - "outlook.office365.com"
    - ii. Port – 993
    - iii. Connection Security – SSL/TLS
    - iv. User's email address
    - v. Authentication Method – "Normal password"
  - b. Outgoing (SMTP)
    - i. Server name – "smtp.office365.com"
    - ii. Port – 587
    - iii. Connection Security – STARTTLS
    - iv. User's email address
    - v. Authentication Method – "Normal password"
4. Create a signature for the new hire with all required components. Set it to automatically apply to all emails.
5. Send a test email to your personal email to confirm successful operation.

## **References:**

1. Install Thunderbird on Windows: <https://support.mozilla.org/en-US/kb/installing-thunderbird-windows>

2. Custom Install on Windows: <https://support.mozilla.org/en-US/kb/custom-installation-thunderbird-windows>
3. Install Thunderbird on Ubuntu Linux: <https://support.mozilla.org/en-US/kb/installing-thunderbird-linux?redirectslug=installing-thunderbird-ubuntu-linux&redirectlocale=en-US>

**Definitions:**

1. Hardware: physical components of a computer, such as the monitor, keyboard, and mouse.
2. Software: programs or applications that run on a computer, such as Microsoft Office or Adobe Photoshop.
3. IT policies and procedures: guidelines and rules set by the company for the use of information technology resources and systems.
4. IMAP – Internet Message Access Protocol, enables checking emails on multiple devices – i.e., work computer, personal laptop/tablet, smart phones
5. SMTP – Simple Mail Transfer Protocol, a communication protocol for sending and receiving email over the Internet
6. SSL & TLS – Secure Socket Layer and Transport Layer Security (respectively) – allow computers to communicate securely over the Internet and provides encryption

**Revision History:**

11/13/2023 -- "Email Account Setup SOP" created by David Renteria