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How to Set up Microsoft Single Sign-On and Access Files in Yao

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How to Set up Microsoft Single Sign-On and Access Files in Yao

Setting up your Microsoft Single Sign-On (SSO) with **Yao** provides a seamless and secure login experience, which is what allows for immediate access to your email correspondence and Microsoft Office files within the platform. This connection automatically links your email and OneDrive, removing the need for further sign-ins when opening documents or sending emails from a matter.

Prerequisites

- You must have an active Microsoft account (Office 365) which is linked to your **Yao** profile.

Signing in with Microsoft SSO

Microsoft Single Sign-On is the recommended and most efficient method for logging into your **Yao** account, which connects you to all your necessary tools.

1. On the **Sign in to Yao** screen, locate the **Sign in with Microsoft** button at the bottom of the sign-in area. Yao Login Screen

Sign in to YAO

Enter your details below.

Username

Password

Law firm's code

Remember me

[Forgot password?](#)

Login

 Sign in with Microsoft

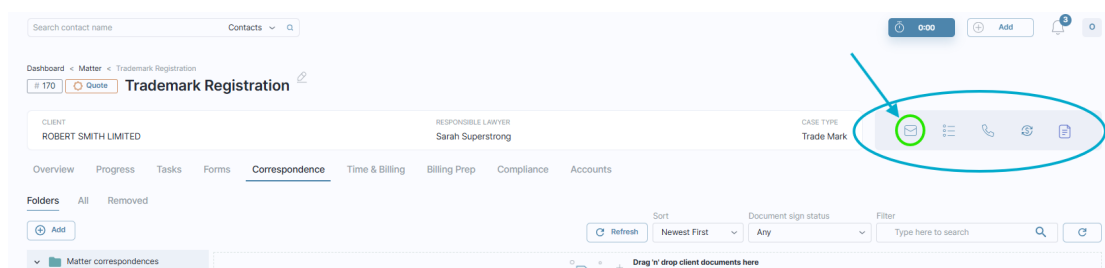
Don't have an account yet? [Signup](#)

1. Click the **Sign in with Microsoft** button. You will be immediately logged into your **Yao** account and connected to your email and OneDrive.

Manually Connecting Your Microsoft Account from a Matter

If you initially sign in using your username, password, and firm code, you will need to manually connect your Microsoft account to enable file access and email functions.

1. **Navigate** to a matter - any screen or tab and use the grey 'Quick Access' bar.



1. **Click** the **Send an Email** icon (which looks like an envelope) located in the grey quick access bar in the

upper-right section of the matter dashboard - see above.

- If you are not yet connected, an **Email Sign-in** window will open, and you will not be able to send an email until you sign in.

1. Follow the **Microsoft sign in** procedure. The system will prompt you to complete the Microsoft sign-in process.
2. Once the sign-in is complete, you will be navigated back to Yao. If it hasn't auto-closed, you should **close** the **Microsoft** window.

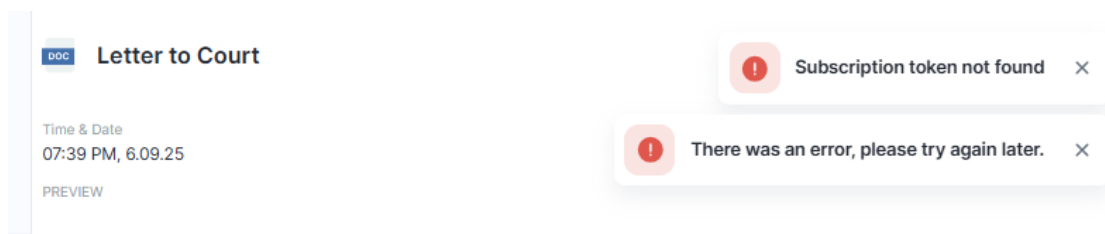
Accessing Office 365 Documents

Yao uses the Microsoft suite of tools for document handling, so accessing a document (such as a Word, Excel and other **Office 365** files) requires you to be signed in to your Microsoft account.

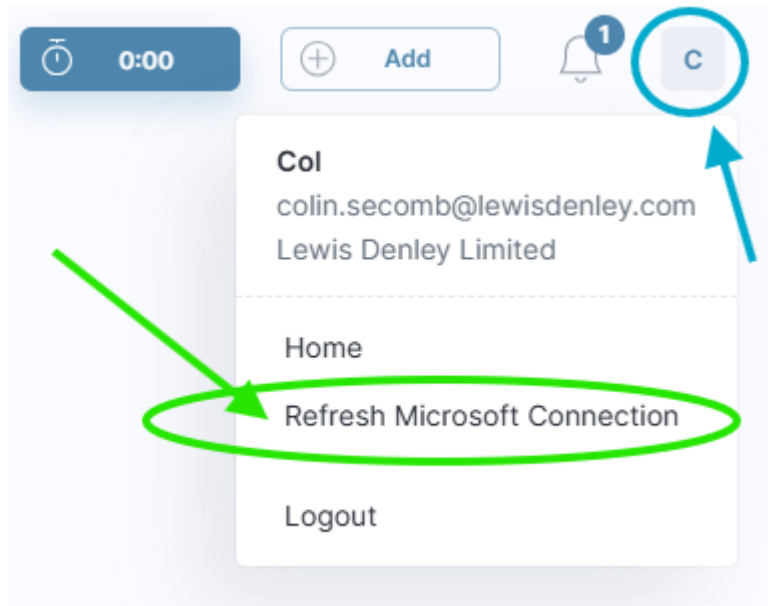
1. **Navigate** to the Correspondence tab of any matter. **Locate** a Microsoft document (e.g., a Word or Excel document) in the list
2. **Click** the file link to open the document preview.
 - The preview panel will appear on the right side of the screen.
1. To open the document in your Microsoft application, **click** the **Open in OneDrive** icon (which looks like an arrow pointing out of a box) at the top of the preview panel.



1. If you have not successfully signed in with Microsoft, an error will appear. The error message will state: **Subscription token not found. There was an error, please try again later.**



1. To resolve this, either manually connect your Microsoft account using the instructions above (**Click the Send an Email** icon (which looks like an envelope) located in the grey quick access bar in the upper-right section of the matter dashboard) or **sign out of Yao** and **Sign in with Microsoft**.
2. If you are having difficulties signing into Microsoft there is a 'Refresh Microsoft Connection' option under your user icon in the very top right corner of Yao:



Press this, then sign out and you should then be able to restart the signing in process.