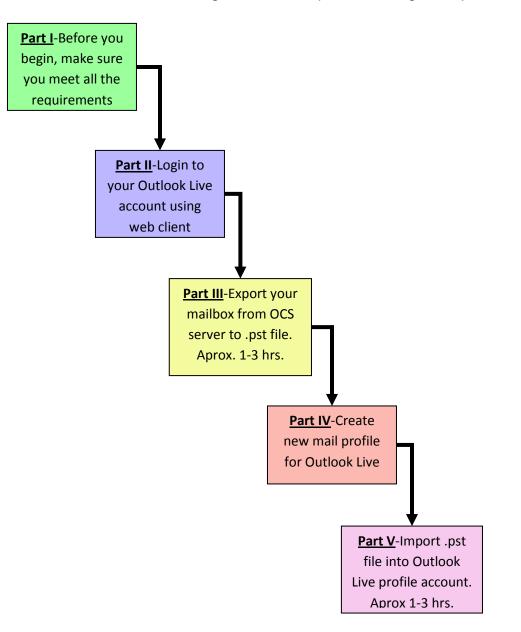


Introduction:

Welcome to HBU's Outlook Live email system. This document provides guidance on how to migrate your emails, calendar entries, tasks and personal contacts from the OCS email server to the new Outlook Live email server. The following illustration explains the migration process:



Part I - Before you Begin:

As a requirement, the migration process must be done from a computer with Windows XP. Also, you must have Microsoft Outlook 2007 installed in your computer (If you don't have it, call the ITS Helpdesk for assistance). For Mac users, go to the helpdesk area to migrate your emails/calendar entries using a Windows XP computer.



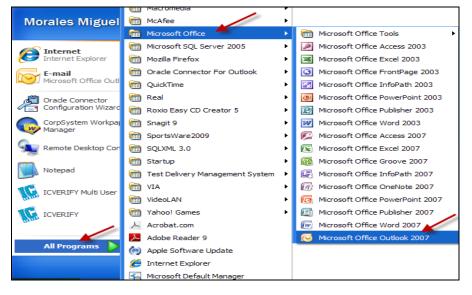
Part II - Login to Outlook Live:

Before you begin any migration tasks, if you have never logged in to your Outlook Live account, you must do so now. First-time login instructions can be found at <u>http://www.hbu.edu/email</u>.

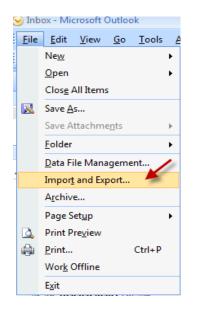
During the entire migration process you may stay logged in to the Outlook Live web client to send and receive new emails.

Part III - Export from OCS:

1. To export your information, go to the Start button \rightarrow All Programs \rightarrow Microsoft Office \rightarrow Microsoft Office Outlook 2007.

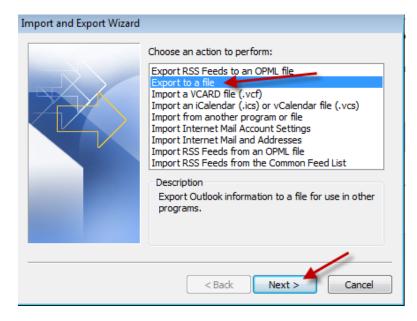


2. Click the File menu and select Import and Export...

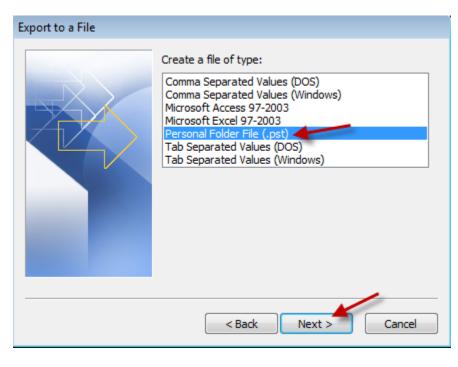




3. Select Export to a File

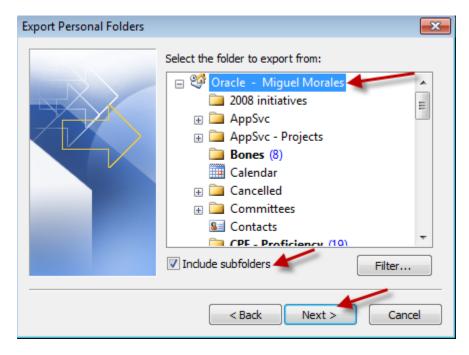


4. Select Personal Folder File (.pst), click Next.





5. Select the top folder (e.g., **Oracle – Your Name**). Check the "**Include subfolders**" check box. Click **Next.**



6. Click the **Browse** button.

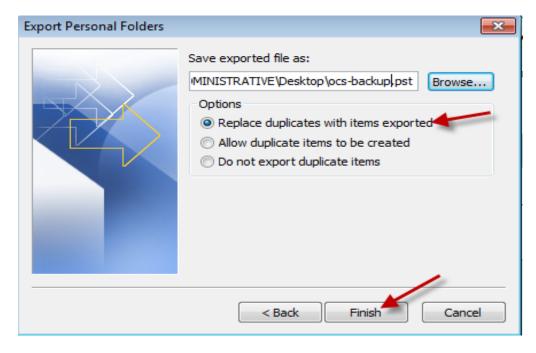
Export Personal Folders	
	Save exported file as: Ata\Local\Microsoft\Outlook\backup.pst Browse Options Allow duplicate items to be created Do not export duplicate items
	< Back Finish Cancel



7. Select the **Desktop** and name the file "ocs-backup.pst". Click Ok.

Open Personal	Folders					? 🛛
Save in:	Besktop	*	۰		× 🖻	-
My Recent Documents Desktop Documents My Computer My Network Places	My Documents My Computer My Network Places Shares					
	File name: ocs-backup.pst			~		
	Save as type: Personal Folders Files (*.pst)			•	1	
Too <u>l</u> s •			OK		Ca	ncel

8. Make sure that the "**Replace duplicates with items exported**" radio button is **selected**. Click the **Finish** button.





9. On the following screen click **OK**. The Export Process starts. This step may take several hours depending on the size of your mailbox.

During this time you will not be able to use Outlook Desktop client; however, you may use the Outlook Live web client to send and receive emails.

Create Microsoft Personal Folders			
File:	C:\Users\mmorales.ADMINISTRATIVE\Desktop\c		
Name:	Personal Folders		
Format:	Personal Folders File		
Password			
Passwo	rd:		
Verify Password:			
Save this password in your password list			
OK Cancel			

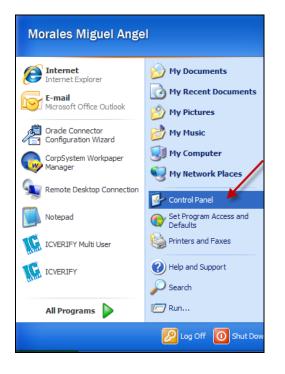
10. Exit Microsoft Outlook 2007 and **confirm** that you have the file "ocs-backup.pst" on your Desktop.



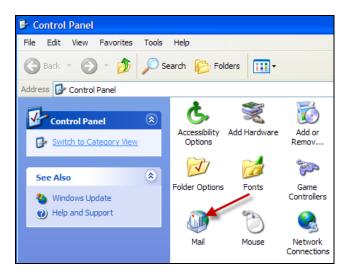


Part IV - Create new Profile:

11. Click the Start button \rightarrow Control Panel.

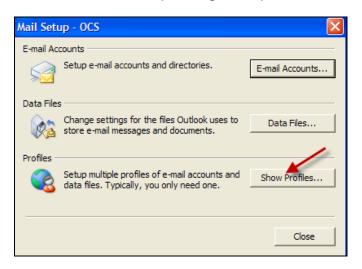


12. Control Panel opens. Click on Mail.





13. The Mail Setup dialog box opens. Click the **Show Profiles...** button.



14. The Mail configuration box appears. One profile already exists for your OCS connection. You are going to create a new connection for the Outlook Live email server. Click on the **Add...** button

Mail				X
General				
The foll	owing profiles a	are set up on thi	s computer:	
OCS			<u>^</u>	
			~	
Add	Remove	Properties	Copy	
When starting	Microsoft Offic	e Outlook, use t	this profile:	
C Prompt	for a profile to	be used		
Always	use this profile			
OCS			•	
	ОК	Cancel	Apply	



15. The New Profile dialog box appears. Type "Outlook-Live" in the Profile Name field. Click OK.

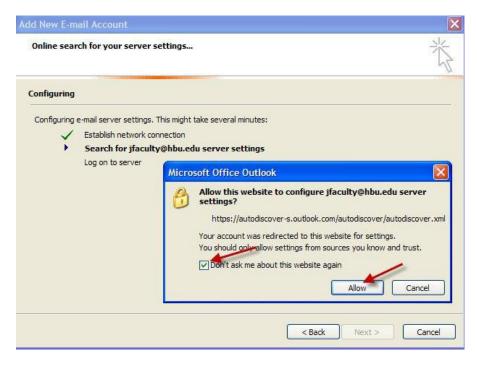


16. The Add New E-mail Account dialog box appears. Delete the email address. Enter your name in the field provided. Also enter your HBU email address. Finally enter your Outlook Live password and retype it in the field provided. Click Next. Never select the "Manually configure server settings or additional server types" box.

Add New E-mail Acc	ount			
	p contact your e-mail server and configure your Internet service provider or Microsoft account settings.			
Your Name:	Jane Q. Faculty Example: Barbara Sankovic			
E-mail Address:	jfaculty@hbu.edu Example: barbara@contoso.com			
Password:	*****			
Retype Password:	Type the password your Internet service provider has given you.			
Manually configure server settings or additional server types				
	< Back Next > Cancel			



17. The profile configuration process will start. Then a message from Microsoft Outlook Appears. It will ask "Allow this website to configure yourusername@hbu.edu server settings?" Check the "**Don't ask me about this website again**" check box. Click the **Allow** button. This step may take 1 or 2 minutes.



18. Then the "Connect to sn1prdxxxx.mailbox.outlook.com" dialog box appears. Enter your username which is your full email address (e.g., yourusername@hbu.edu). Finally, enter your Outlook Live password and click OK.





19. The Configuration dialog box continues and the message "Your email account is successfully configured to use Microsoft Exchange" appears. Click the **Finish** button. (**Note:** If this process fails, click Cancel, remove the newly created profile (Outlook-Live) by selecting it from the list and clicking the Remove button. Start over at step 14). Never select the "Manually configure server settings" box.

Add New E-mail Account	×
Congratulations!	
Configuring	
Configuring e-mail server settings. This might take several minutes: Establish network connection Search for jfaculty@hbu.edu server settings Log on to server	
Your e-mail account is successfully configured to use Microsoft Exchange.	
< Back Finish	Cancel

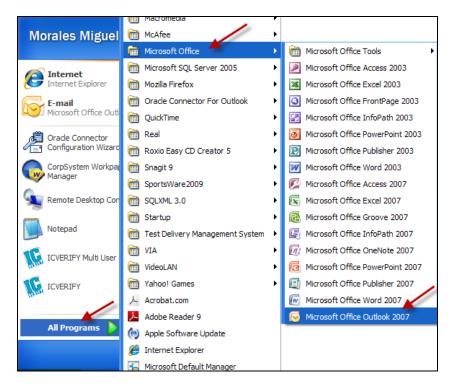
20. Since your default profile is the one connecting to OCS, we need to change this. Select **Outlook-Live** profile from the list and click on the "**Always use this profile**" radio button . Make sure that the profile name "Outlook –Live" (or the name you gave to the new profile in step 15) appears in the drop-down field. Click **OK**.

Mail			
General			1
D The fol	owing profiles	are set up on this	computer:
OCS Outlook-Live			
			×
Add	Remove	Properties	Copy
When starting	Microsoft Offi	ce Outlook, use tl	his profile:
	for a profile to		
Always	use this profile		-
Outloo	k-Live 📍		-
		/	
	ОК	Cancel	Apply

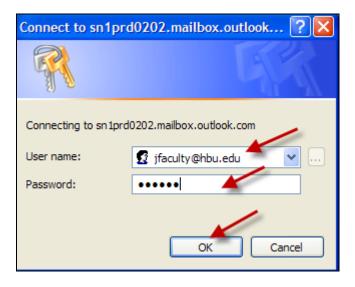


Part V - Import into Outlook Live:

21. Open your Microsoft Outlook desktop client. Go to Start → All Programs → Microsoft Office → Microsoft Office Outlook 2007.

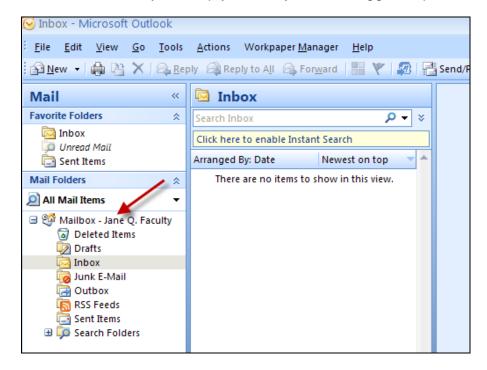


22. As Outlook opens the "Connect to sn1prdxxxx.mailbox.outlook.com" dialog box appears. Enter your Outlook Live **User name** which is your full email address (e.g., yourusername@hbu.edu). Finally, enter your Outlook Live **password** and click **OK**.

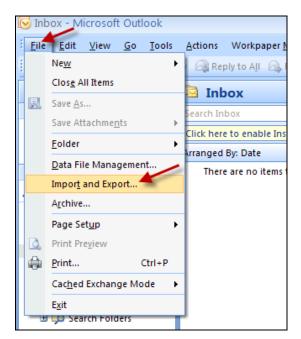




23. Microsoft Outlook 2007 opens and shows your Mail box with your information. At this point the mailbox may be empty unless you have logged in previously during the preview period.



24. We need to import the ocs-backup.pst file with the OCS information. Click on the **File** menu and select **Import and Export...**

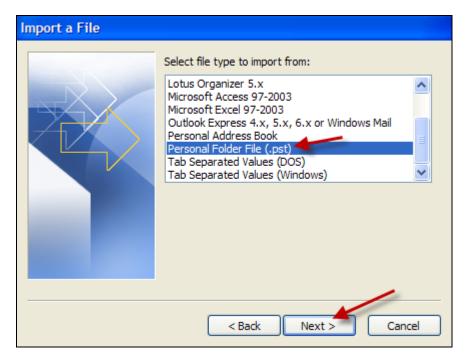




25. The Import and Export Wizard dialog box appears. Select "Import from another program or file". Click Next.

Import and Export Wizard				
Import and Export Wi	Choose an action to perform: Export RSS Feeds to an OPML file Export to a file Import a VCARD file (.vcf) Import an iCalendar (.ics) or vCalendar file (.vcs) Import from another program or file Import Internet Mail Account Settings Import Internet Mail and Addresses Import RSS Feeds from an OPML file Import RSS Feeds from the Common Feed List Description			
	Import data from other programs or files, including ACT!, Lotus Organizer, Personal Folders (.PST), database files, text files, and others.			
	< Back Next > Cancel			

26. Then, select Personal Folder File (.pst). Click Next.





27. Browse to the location of your "ocs-backup.pst" file; which should be located on your desktop. Click on the **Browse** button.

Import Personal Folde	rs 🔀
	File to import <pre>stion Data\Microsoft\Outlook\backup.pst Browse Options Replace duplicates with items imported Allow duplicates to be created Do not import duplicates</pre>
	< Back Next > Cancel

28. Go to your **Desktop** and select the "ocs-backup.pst" file. Click Open.

Open Personal	Folders	? 🔀
Look in:	Desktop	🔮 🖉 🔀 🔁 🐨
My Recent Documents	My Documents My Computer My Network Places	
My Documents	Carlos Shares	
G My Computer		
Yvetwork Places		
	File name:	×
	Files of type: Personal Folders Files (*.pst)	
Too <u>l</u> s •		<u>Open</u> Cancel



29. Then, from the Import Personal Folders dialog box, click **Next**.

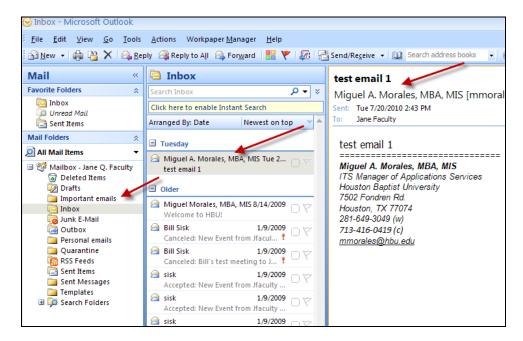
Import Personal Folde	rs 🔀
	File to import tings \mmorales \Desktop \ocs-backup.pst Browse Options Replace duplicates with items imported Allow duplicates to be created Do not import duplicates
	< Back Next > Cancel

30. From the following screen select **Personal Folders** from the list to import from. Make sure that the "**Include subfolders**" check box is **checked**. Also that the "**Import items into the same folder in:**" radio button is **selected**. Finally make sure that the "**Mailbox – Your Name**" appears in the dropdown field. Click the **Finish** button.

Import Personal Folde	rs	×
	Select the folder to import from:	
	< Back Finish Cancel	



31. The import process will begin and may take from a few minutes to several hours, depending on your mailbox size. Now you see that your mailbox appears with all your emails, calendar entries, tasks, etc.



Important: Wait for your computer to finish synchronizing with Outlook Live. Look at the status bar at the bottom right corner of Outlook 2007 for a folder synchronization message. If this message says "Updating this folder" or even "This folder is up to date," **the process has not completed**.



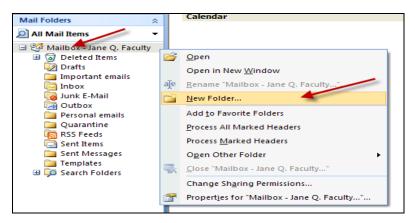
Once the process is complete you will see a message which says "<u>All folders are up to date.</u>" When the status bar looks like the image below.



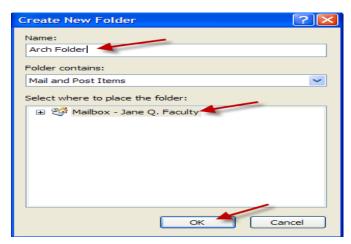


Add Archived Emails:

32. Archiving in Outlook Live will be a manual process. You will have to create a new Folder (or Folders) in the Outlook Live account to keep old or archived emails. In Outlook 2007, from the left pane, **right-click your account name** and select **New Folder...**

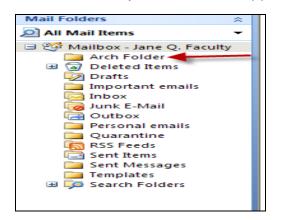


33. Type the **name of the folder** you are creating to store you're old archived folders. In this example the name of the folder is "Arch Folder". Make sure that from the list of places below, **your account name is selected**. Click **OK**.

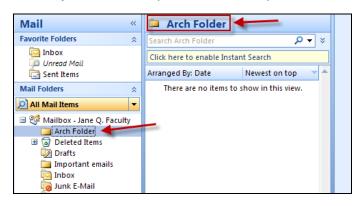




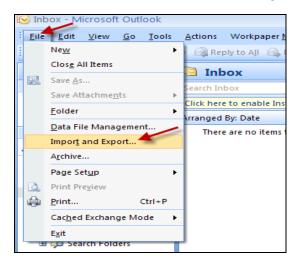
34. The newly created folder appears in the folders list.



35. From the left pane select the folder where you want to import the archive folders. Make sure you see on top of the middle pane the name of the selected folder.

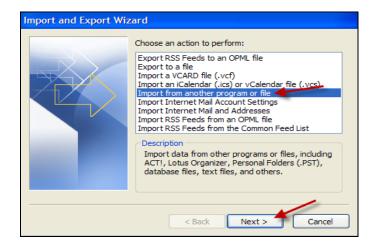


36. From the File menu select Import and Export...

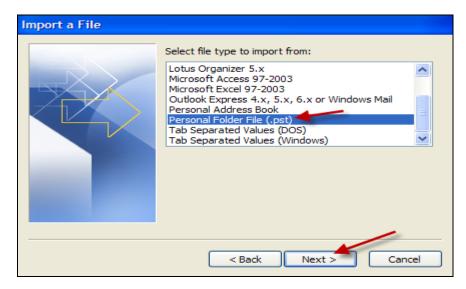




37. The Import and Export Wizard dialog box appears. Select "Import from another program or file". Click Next.



38. Then, select Personal Folder File (.pst). Click Next.





39. Now let's browse to the location of your "**archive.pst**" (or Personal Folder) file; which is a local file. Click on the **Browse** button.

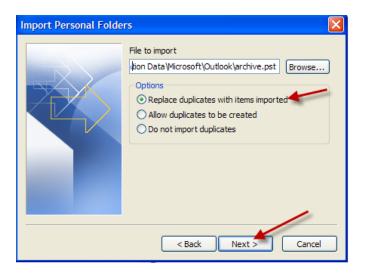
Import Personal Folde	rs 🔀
	File to import <pre>stion Data\Microsoft\Outlook\backup.pst Browse Options Replace duplicates with items imported Allow duplicates to be created Do not import duplicates</pre>
	< Back Next > Cancel

40. Go to "C:\Documents and Settings\username\Local Settings\Application Data\Microsoft\Outlook" (or the location where you save your archive folders) and select the "archive.pst" (or Personal Folder) file. Click Open.

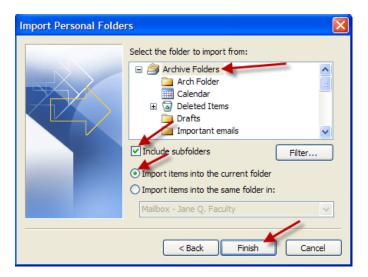




41. Then from the Import Personal Folders dialog box, click Next.

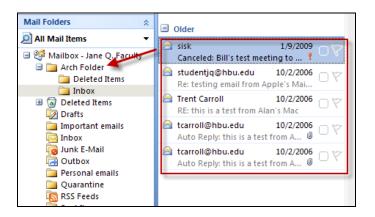


42. From the following screen select Archive Folders (or Personal Folder) from the list to import from. Make sure that the "**Include subfolders**" check box is **checked**. Also that the "**Import items into the current folder**" radio button is selected. Click the **Finish** button.

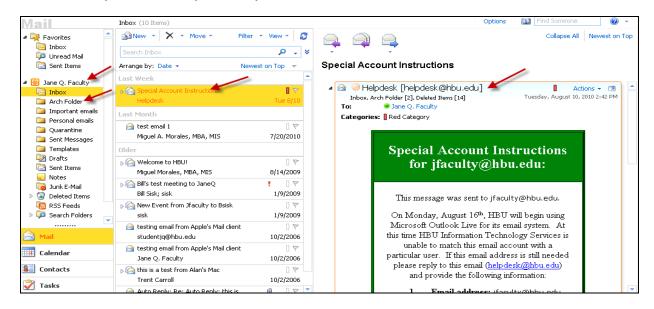




43. The import process will begin and may take from a few minutes to several hours, depending on your archive folder size. Now expand the newly created folder using the **[+]** icon and verify that all your archived emails, calendar entries, tasks, etc. are in this folder.



- 44. Repeat the process for other Personal Folders if you have to. It will take some time for Outlook 2007 to synchronize the newly created folder with the Outlook Live server. From now on, you will manually archive the old emails by moving them from the Inbox to the Arch Folder. In the Outlook Live web client you can easily drag the emails to this folder. **Don't close Outlook 2007 yet.**
- 45. Open a Browser, go to http://www.outlook.com and login again to your Outlook Live Web Client account. After successful login you can see that the Migration Process was successful. Now you are ready to use your Outlook Live Web Client!





Outlook ⁻ Web App			Mail≁ Of	fice∗ More∗			Jane Q. F
Calendar	Calendar (August, 2010)					Options	Find Someone
< 2010 >	🛄 New 👻 🔀 🖺	• 🔃 Share •	View Today	🛄 Day 🛛 🛄 Work W	'eek 🧱 Week 🛄 f	Month 🛛 🖉 🔍 -	🚔 🚔 •
Jan Feb Mar	August, 20	10					
Apr May Jun	Sunday	Monda	y Tueso	lay Wedn	esday / Thurs	sday Fri	day
Jul Aug Sep	Aug 1	S 2	* 3	5 4	× 5	⊡ 6	5 7
Oct Nov Dec		Test meeting	i; H300	Test Lunch	n; Mexican	Test meet	ing; H300
My Calendars	8	5 9	10	§ 11	§ 12	13	§ 14
				ſ	ouble-click to add an	event.	
	15	5 16	17	[™] 18	¹ 2 19	⊵ 20	s 21
	22	S 23	S 24	S 25	S 26	S 27	☑ 28
Ail Mail							
Calendar	29	S 30	S 31	🗟 Sep 1	☑ 2	S 3	4

Outlook Web App		Jane Q. Fao s		
Contacts	Contacts (1 Items)			Options 🔯 Find Someone
Show:	📓 New 👻 🔀 🎽 View 👻 💋		🔁 🏢 🙈 Forward	
All	Search Contacts	\$ _ 0	Smith, John	
People	Arrange by: File as -	A on top 🔺	Doctor Medical Associates	
Groups	Smith, John	<u>_</u>	Contact E-mail	John Smith (jsmith@yahoo.com)
My Contacts	Doctor , Medical Associates		Business	(281) 980-0000
See Contacts			Profile Job title Company	Doctor Medical Associates
			Details Notes	
Mail				
Calendar				
Contacts				

46. Delete the new Outlook Live Profile. Make sure that Step 31 shows that All Folders were updated. <u>Important:</u> As soon as you confirm a successful migration from OCS to Outlook Live and verify that all your emails, calendar entries, tasks, etc., are available in the new email system, we strongly recommend you remove or delete the new Outlook-Live profile from your computer system. The following instructions show you how to remove the profile:



Close Outlook 2007. Click the Start button \rightarrow Control Panel.



47. Control Panel opens. Click on Mail.



48. The Mail Setup dialog box opens. Click the Show Profiles... button.





49. The Mail configuration box appears. It shows both the OCS profile and the new Outlook-Live profile. **Select only the new "Outlook-Live" profile** and click the **Remove** button.

Mail 🔀
General
The following profiles are set up on this computer:
OCS Outlook-Live
Add Remove Properties Copy
When starting Microsoft Office Outlook, use this profile:
Prompt for a profile to be used
 Always use this profile
Outlook-Live
OK Cancel Apply

50. Then the following dialog box appears. Click **Yes** to confirm Removal. Click **OK** to exit the Mail window.

Microsof	ft Office Outlook
?	Are you sure you want to remove this profile from the system?

51. Finally, make sure your **Internet Explorer Browser is ver. 7**, if not ask the helpdesk to get the upgrade.

For more information contact ITS at <u>helpdesk@hbu.edu</u> or call x.3410

By Miguel Morales ITS Application Services Manager x.3049 <u>mmorales@hbu.edu</u>