Finance and Business Staff,

On your unit's appointed morning when you arrive at work you will find that you have been migrated to PSU's Office 365 instance. The following are some key things to know.

- The migration process begins at 4:30pm on the day before and will continue through the night. During the mailbox migration, items are transferred from newest to oldest and you can start using the new Office 365 mailbox (and webmail) shortly after the process begins.
- Your current version of the Microsoft Office Suite is also being replaced with the Office 365 edition. Please be sure to save any work prior to leaving (5:00 PM) as your workstation will be restarted several times overnight to complete the upgrade process.
- FBIT staff will be on site at locations prescribed by your unit's leadership and will remain on site as long as we are needed to help assist with this migration.
- Additional tips and information about the migration can be reviewed at https://fbit.psu.edu

In the following sections we have some recommendations and tips related to the migration that we hope you will find helpful.

Contents

# All Users – Outlook Mail Setup

Setting up Outlook in O365

The look and feel of your email should be familiar. However, to get into Outlook you'll need to complete a few steps:

1. First, and very important, you need to remove any existing profiles for Outlook. To accomplish this do the following:
   a. In the **Search Screen** (bottom left of your desktop) type "Control Panel" and click on the option that comes up.
   b. When the **Control Panel** window appears, find the Mail icon and double click it.
   c. When the **Mail Setup** window appears, click on the **"Show Profiles"** button.
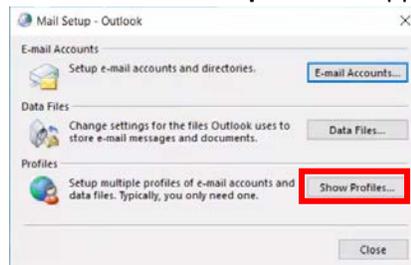
   d. When the Mail General window appears, highlight your Profile and click on the "Remove" button. Repeat this step for all profiles you have configured.
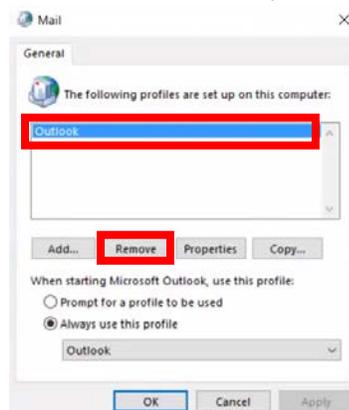
2. After you have removed any existing profiles for Outlook locate the shortcut for Outlook 2016 and launch the program.
3. The initial launch screen will ask you for your email address. This is your central address with **ONLY** the @psu.edu after your userid. Enter that and click the **Connect** button.
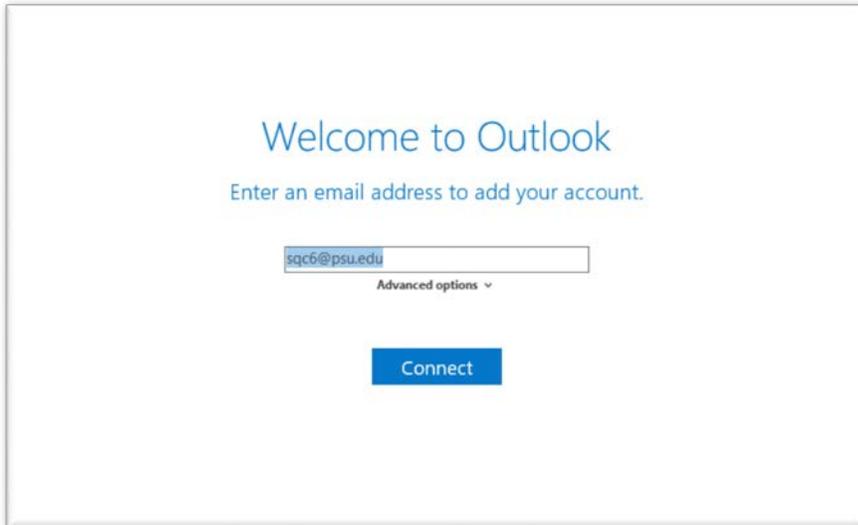
4. Outlook will begin setting up your account and you'll see the screen below.
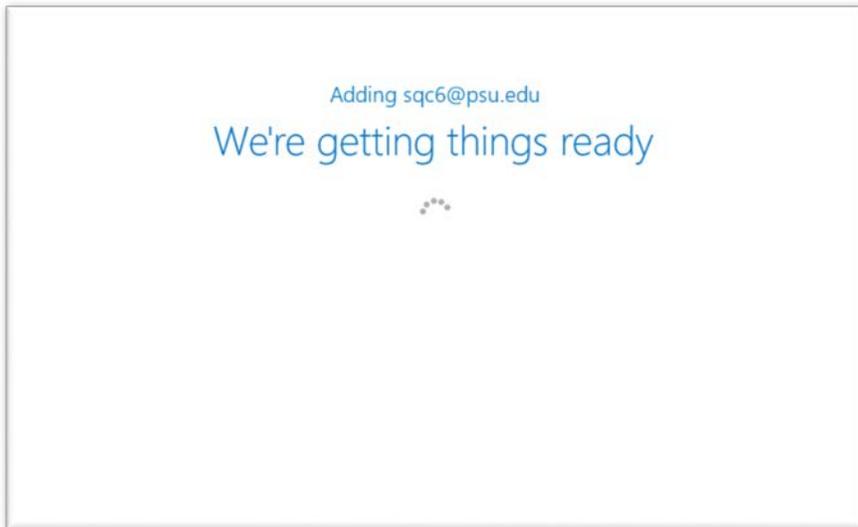
5. Once your account is set up and ready to go you'll see the following screen. Click on the **OK** button.

Adding sqc6@psu.edu
Account setup is complete

OK

☑ Set up Outlook Mobile on my phone, too
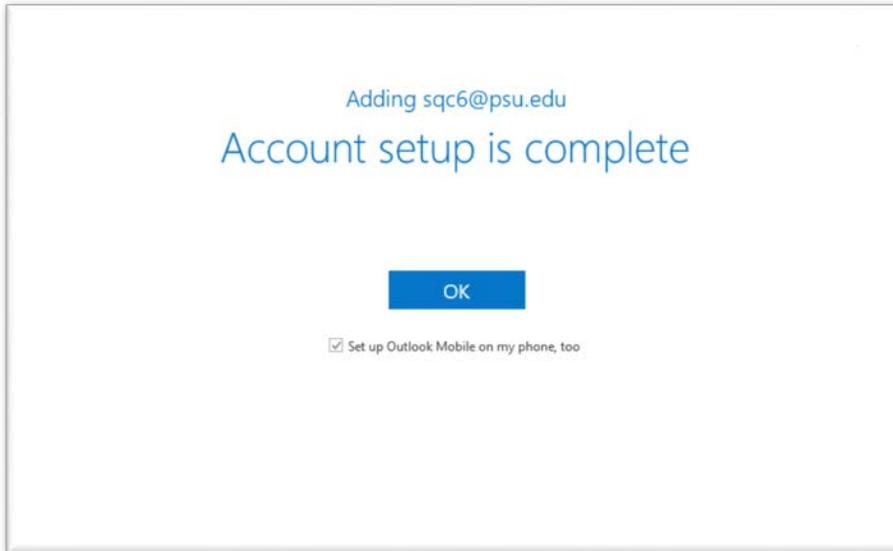
6. At this point Outlook will launch and begin downloading a local copy of your email. Depending on the amount of data you have in your account, this could take some time.

Checking Email via the Web

Having the ability to check email via web browsers is key when one is traveling and/or computers are unavailable. With this move to Office365 the site you will use to do this has changed. The new site to use is Office365.psu.edu. When you visit this site use the **Login** button at the top right corner. Once you've logged in you can click on the Outlook app button on the top left of the screen.

4
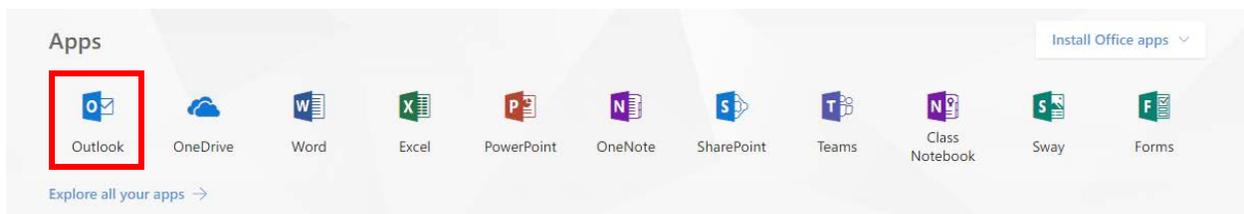
Some Users (Application Specific)

Outlook Calendars – Before Migration

In case the migration does not happen as quickly as planned or if there are snags we recommend doing the following with your calendar(s):

- Print out the current week of your Calendar.
- Print out the current week of any other Calendars you manage (other staff, rooms, resources, etc).
- Know who is a delegate for your Account/Calendar.
- Know whose Account/Calendar for whom you are a delegate.
- Know with whom you have shared your Calendar.

Outlook Calendates - After Migration

Once your account is migrated and you have been able to log into Outlook check the following things that apply to you:

- If you are a delegate for someone else' Account/Calendar check to make sure you still have the ability to manage that as you have in the past and if not bring it to their attention or that of the FBIT staff.
- If you have delegates for your Account/Calendar check to make sure that they still have the ability to manage your Calendar as they have in the past.
- If you have shared your Calendar in the past make sure that those individuals still have access.
- Make sure you can still access Shared Resource Calendars such as conference rooms and focus room Calendars.

Shared Resources – Before Migration

Before the migration date make note of what shared resources you have access to so that after the migration you can set those up again.

Shared Resources – After Migration

After the migration you can set up your access to any shared resources you previously had access to.

If you have the need to add a particular shared resource as a mailbox in your account follow these steps:

1. Log into Outlook
2. Click on **File**
3. Click on the **Account Settings** button with down arrow

4. Click on **Account Settings** option
5. In the Account Settings window double click on your **email account** in the main window.
6. In the Change Account window Click on the **More Settings** button.
7. In the next window click on the **Advanced** tab.

8. Click on the Add button.
9. Enter the Account name or email address.
10. Click on **Ok**, Click on **Ok**, Click on **Next**, Click on **Finish**, Click on **Close**.
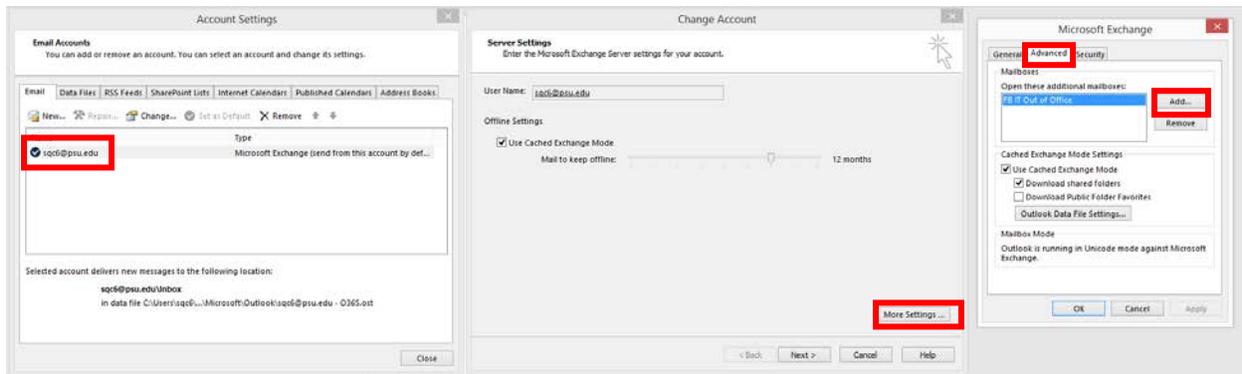
Signatures – Before Migration

Make note of your signature(s) before the migration in case the data does not migrate over.

Signatures – After Migration

Your signature should migrate with your account. If it does not, once you are in O365 you can look at recently sent items and copy the text of your signature and add it back into your account. If your signature does migrate it may still not be turned on for new or reply/forward messages, you will want to check that it's active.

1. Log into Outlook.
2. Click on **File.**
3. Click on **Options** (in the left column).
4. Click on **Mail** (in the left column).
5. Click on the **Signatures** button.
6. Put your signature in the main window and along the right side select which signature to use for New Messages and Replies/Forwards.
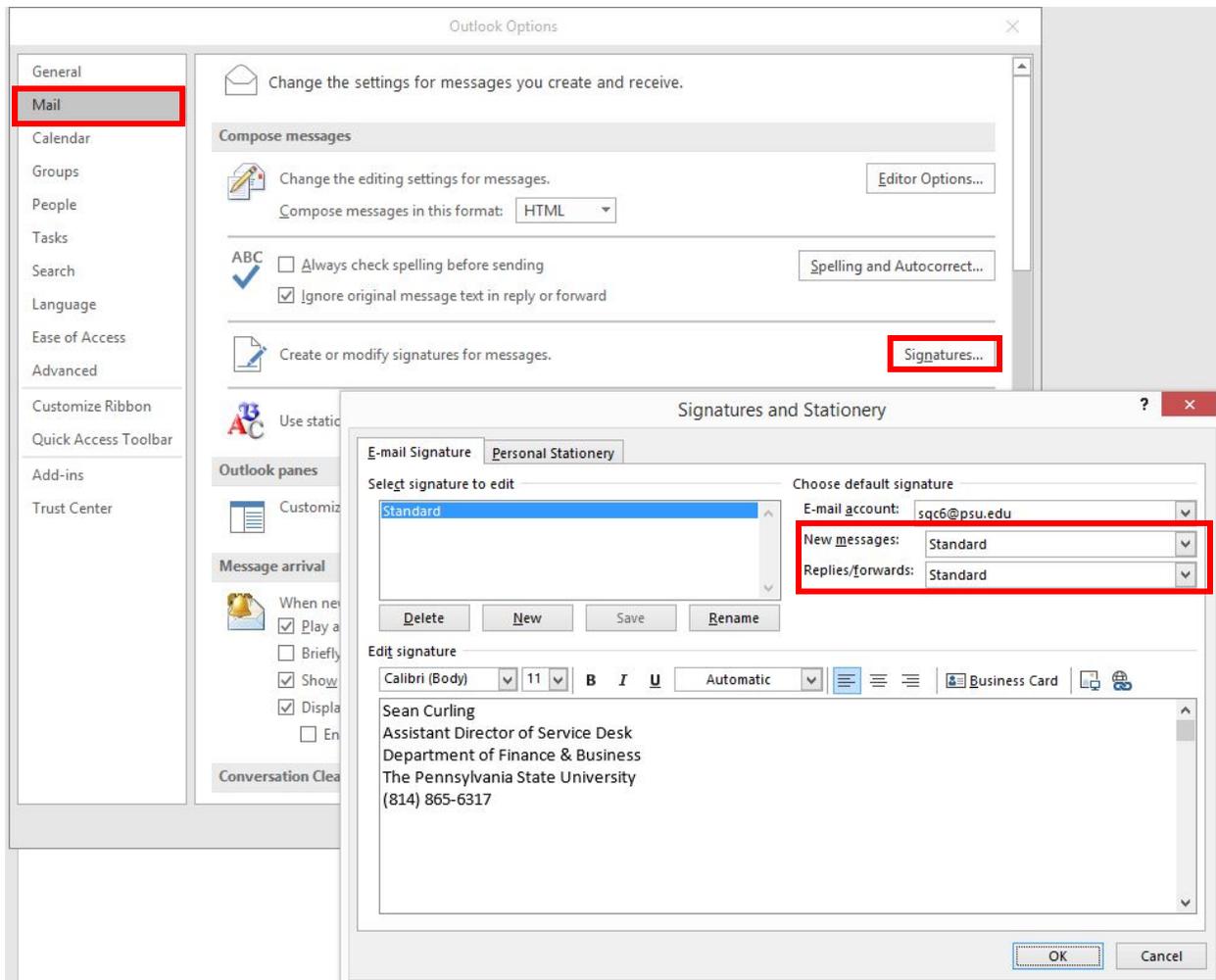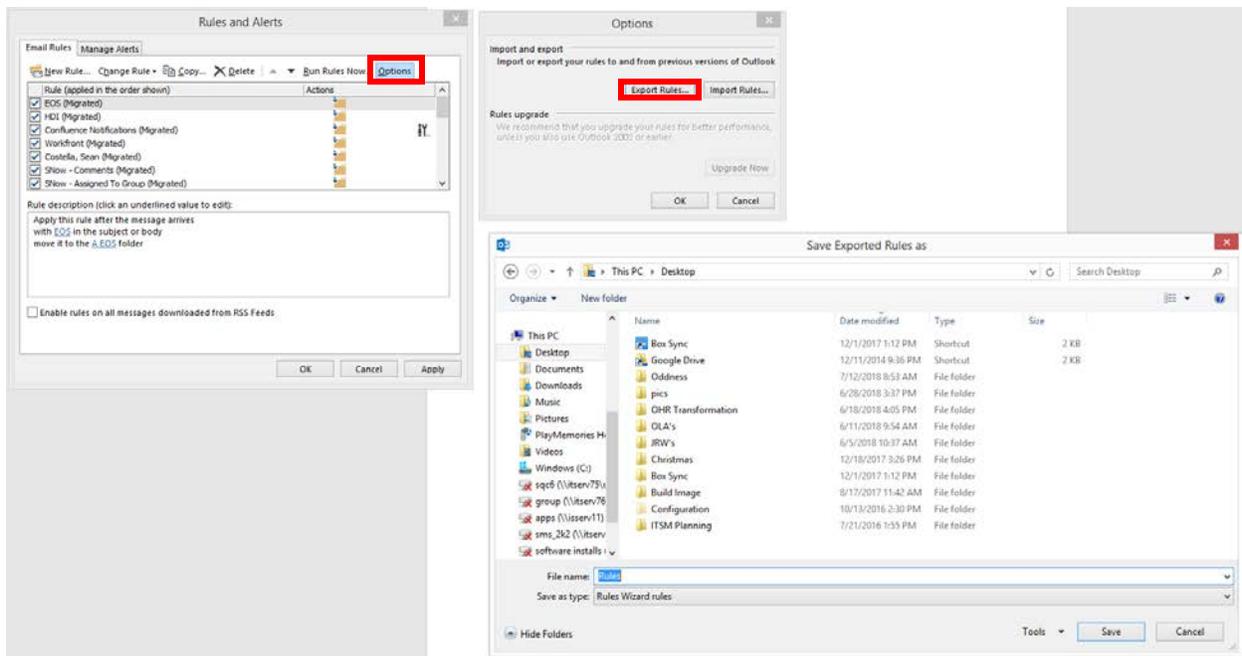
Filters and Rules – Before Migration

Your Filters and Rules (which are typically used to automatically deliver email items into particular folders) should migrate over with the rest of your data. However, it's good to take a look at your Filters and Rules prior to migration to be aware of what they are. You can also export your Filters and Rules to a file to have just as a backup. To do this follow these steps:

1. Log into Outlook
2. Click on **File**
3. Click on the **Manage Rules & Alerts** button

4. Click on the Options button
5. Click on the Export Rules button
6. Save the file locally in your VDI like to your desktop

Make note of your Filters and Rules which are used to direct items in Outlook into particular paths, typically into specific sub-folders in email. Your filters and rules should migrate
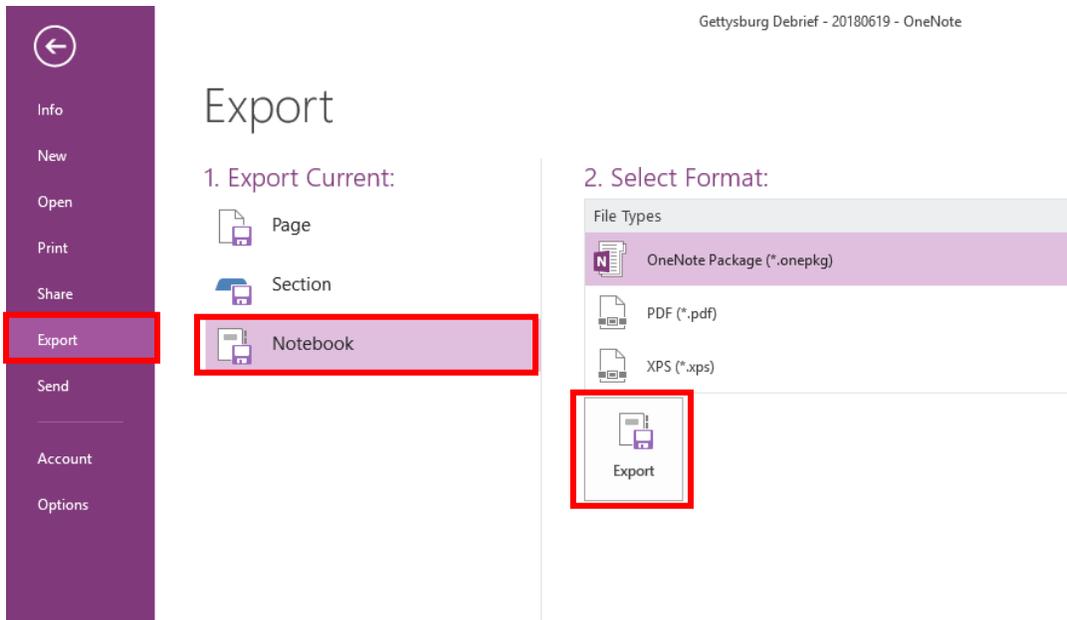
Filters and Rules – After Migration

If your Filters and Rules do not automatically migrate you can use the same process listed above but selecting the **Import Rules** button and find the file you saved before.

OneNote – Before Migration

If you use OneNote your data should still be available through the OneNote application after the migration to Office365. However, should something not work properly we recommend backing up (exporting) a copy of your Notebook.

To backup/export your OneNote notebook do the follow:

1. Launch OneNote.
2. Click on **File**.
3. Click on **Export**.
4. Click on **Notebook**.
5. Click on the **Export** button.
6. Save the exported file to your desktop that can then be imported later.

Export

1. Export Current:

Page

Section

Notebook

2. Select Format:

File Types

OneNote Package (*.onepkg)

PDF (*.pdf)

XPS (*.xps)

Export

OneNote - After Migration

If for some reason your Notebook does not migrate appropriately you can open your exported notebook. All you need to do is find the file on your desktop and double click on it and define a name and click on the **Create** button.

Unpack Notebook

Specify the notebook properties

Name:
Test

Color:

Path:
C:\Users\sqc6\Documents\OneNote Notebooks

Browse...

Full path: C:\Users\sqc6\Documents\OneNote Notebooks\Test

Create   Cancel