

Pre-Migration Instructions for Outlook 2007

BPOS Pre-Migration Instructions – Outlook 2007

✓Steps to Complete during the Week before Migration

****Print this portion of the document so that you can record information about features you use in Outlook 2007. ****

Record Outlook Settings

You will need this information when you set up Outlook for your UAConnect account.

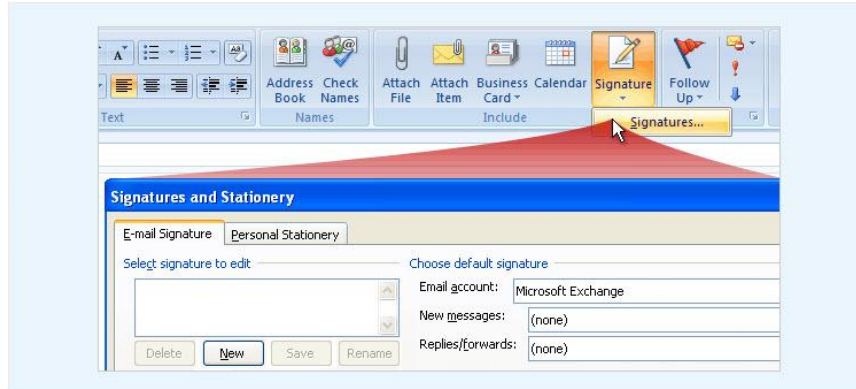
As part of reconfiguring for UAConnect on campus, if you are using Outlook, you should note some settings in Outlook as you will be removing the Outlook profile.

1. Open Outlook using the Microsoft Online Services Sign In (MOSS).
2. **Outlook 2007 Data File(s) – Personal Folders with .PST File Extension**
 - a. On the **Tools** menu, click **Options**.
 - b. On the **Mail Setup** tab, click the **Data Files** button.
 - i. Note the location (file paths) of the files with the file extension **.pst**. For example, C:\Exchange\Mailbox.pst indicates a .pst file that is named Mailbox.pst located in the Exchange folder on your drive C. (You do not need to note the location of any files with an **.ost** extension.) If you do not see any **.pst** extension files it just means that you do not have any local data so there is nothing for you to note.
 - ii. Location:

 - c. Click **Close**, and then click **OK**.
3. **Outlook 2007 Rules Export**
 - a. In the Navigation Pane, click **Mail**.
 - b. On the **Tools** menu, click **Rules and Alerts**.
 - c. If you have more than one email account in the **Apply changes to this folder list**, select the **Inbox** that you want.
 - d. Click **Options**.
 - e. Click **Export Rules**.
 - f. In the **File name** box, type the path and file name for the set of rules that you want to export.
 - g. Click **Save**.

4. Outlook 2007 Signatures

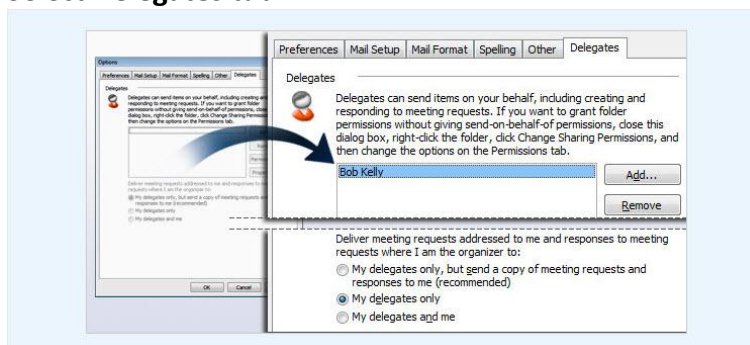
- In a new message, on the Message tab, click on **Signature**, and then click **Signatures**.
- At the **Signatures and Stationery** window click on the **E-Mail Signature** tab.



- In the **Select signature to edit** text field note which signatures are used for your various messages. You can write them below, send yourself an email with your signature(s) to another email account, print a copy, or copy and paste your signature(s) into this document for later.
- Your signature should have migrated but you will need to select the appropriate signature for both **New Messages** and **Replies/Forwards**.
- Configure **New Messages**: with the names of the new messages signature.
- Configure **Replies/forwards**: with the name of the reply signature.
 - _____
 - _____

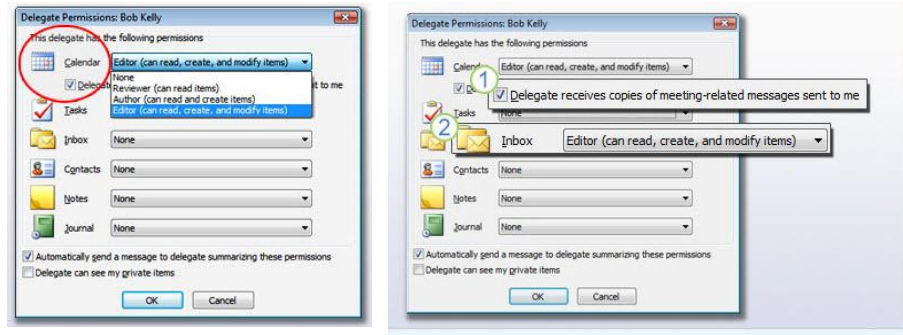
5. Outlook 2007 Delegations – Only Perform This Step if You Assigned Delegates

- Click on **Tools**.
- Click on **Options**.
- Select **Delegates** tab.



- Note the account names of those who have delegate access as well as the **Deliver meeting requests** options.
 - Delegate name: _____
 - Delegate deliver meeting request option: _____

- iii. Select a delegate and click on the **Permissions** button.



- iv. Note options listed in this window:

- e. Note items under (d) for all your delegates.
f. Repeat steps (d) through (e) for each delegate.

6. Outlook 2007 Calendar Shares

If you are sharing your calendar, you will need to note who you are sharing your calendar with and what permissions are granted.

- To open your calendar, click on **Calendar**.
- Under the heading **My Calendars**, right click on **Calendar**. **Note:** if you have sub-calendars you will need to repeat the following steps for each one.
- Select **Properties**.
- Click on the **Permissions** tab.
- Note the name of the person you are sharing your calendar with and the permission level:

Name	Permission Level

7. Outlook 2007 Personal Distribution Lists

If you use a distribution list to send email to a group of people, this information will not carry over during migration. You will need to save the distribution list name and email addresses affiliated with that list. This includes distribution lists you created for task requests and meeting requests.

- Open **Contacts**.

Save the information collected above for use when you configure Outlook for your new UAConnect account.

✓ **Steps to Complete on the Friday before Migration, Prior to 5:00 p.m.**

You will not have access to your BPOS account after the migration, beginning 5:00 p.m. Friday.

1. **Complete** all email and calendar tasks prior to 5:00 p.m.
2. If you connect to your email with a smartphone or mobile device - **remove** your BPOS account in your smartphone or mobile device settings.
 - a. **Restrictions**
 - i. If you do not, you will receive messages over the weekend that your device cannot connect to your account.
 - ii. Be aware that your device also pulls Contacts and Calendar information from your BPOS account, therefore this information will not be available over the weekend, so be sure to record any important information you need access to over the weekend.
 - b. **How to Remove BPOS from a Mobile Device**
 - i. Visit <http://uits.arizona.edu/uconnect> and click on the **Mobile** link.
 - ii. Locate your device and click on the related link.
 - iii. Locate the information on how to remove old UAConnect (BPOS) settings.
 - iv. **Note:** do not attempt to set up your device with the new UAConnect settings until after migration is complete and you have configured your email account. Mobile device set-up is the last portion of this document.

✓ **Do not Use Your Email Account over the Weekend of Migration May 19-20.**