Exchange Online email migration guide for Cambridge Development and Alumni Relations staff

https://www.uis.cam.ac.uk/acn-exchange-migration
Before

- Day before
- Overnight
- Day after

Pre-light checks

- Check your UIS Password
- Check your Lookup entry
- Prep your mailbox.

Est.: 15 mins to 1 hr

Stop using email

We strongly recommend you stop using your email from 18:00 so that you don’t lose any work-in-progress if you are working while your mailbox is moved.

Delete old connections

As Exchange On Premise shared resources get migrated to Exchange Online over time, you will need to delete the temporary connections you added.

Est.: <5 minutes per shared resource

You can still access your mailbox in Outlook while it is in the queue to migrate.

At the point your mailbox data is actively being migrated, you can’t sync, send or receive email.

Est.: minutes rather than hours

Your old mailbox stops working and you can’t connect to it in Outlook.

You can now access your new mailbox using the web portal at https://outlook.office365.com, but we recommend you wait until 09:00 the next day.

UIS staff check that the migration has completed correctly, and complete the automatic set-up process for Outlook on managed desktop PCs.

Wash-up

1. In Outlook, you will need to (1) clean your local cache, (2) recreate your signatures and (3) add back connections to shared mailboxes and calendars.

Est.: 15 mins + <5 minutes per shared resource

2. You will need to change the email settings on your unmanaged devices (i.e. phones, tablets, laptops and desktop Macs).

Est.: 15 mins/device for most people

Final mailbox data migration and change over to your Exchange Online mailbox

Worst case scenario:

In the unlikely event that either the whole batch, or some individual mailboxes within it, fail to migrate, you will continue to use your old mailbox as usual, and we will try again the following evening. No emails will be lost.

Training and Support

Online training resources are available, and ongoing technical support will be provided by the UIS Service Desk.

Your actions

- Stop using email
- Delete old connections
- Change email settings on unmanaged devices

UIS actions

- Behind-the-scenes, we start to copy your mailbox data to your new Exchange Online mailbox
- UIS ac tions: 18:00 - 09:00
- UIS staff: check that the migration has completed correctly and complete the automatic setup process for Outlook on managed desktops.

Final mailbox data migration and change over to your Exchange Online mailbox

Anticipated disruption during your migration to Exchange Online email

UIS actions

- Support available during the day
- Fix: 2-5 minutes per exchange
- Train your team
- UIS password check
- Check your mailbox
- Front desk support
- Fix: 2-5 minutes per exchange

Your actions

- Check your UIS Password
- Check your Lookup entry
- Prep your mailbox.

Est.: 15 mins to 1 hr

Bulk mailbox migration

Behind-the-scenes, we start to copy your mailbox data to your new Exchange Online mailbox.

Your mailbox is migrated to the cloud while you carry on working as usual.

Outlook offline, cannot send or receive email.

Outlook on the cloud, you can still access your mailbox.

Worst case scenario: In the unlikely event that either the whole batch, or some individual mailboxes within it, fail to migrate, you will continue to use your old mailbox as usual, and we will try again the following evening. No emails will be lost.
What’s happening to your email?

Your email is being moved into the Microsoft Cloud (Exchange Online) to make it more reliable. You’ll have better remote access and a bigger mailbox allowance (50GB). Your email will also be easier to use on your mobile devices using the native Outlook apps that are available for iOS, Android and Windows devices.

Will there be any downtime?

This will all happen overnight so you won’t have any downtime during working hours (see the illustration opposite).

On the night of the changeover to the new system, the contents of your old mailbox, including any sub-folders, will be copied to your new Exchange Online mailbox. While this is happening, you will not be able to sync, send or receive email, but this will only be for a short period of time.

Once your mailbox data is in Exchange Online, your old mailbox will be switched off and new email will be delivered to your new mailbox.

Will I have to do anything?

Yes – there’s some ESSENTIAL ‘pre-flight checks’ to do to prepare your mailbox before the changeover, and a few ‘wash-up’ tasks to do to get Outlook back to normal afterwards, but nothing too difficult.

Desktop Macs and mobile devices

If you also use a Mac and/or any mobile devices for your email you will need to change some settings in your email app(s) yourself, using the simple instructions provided on page 14.

Managed desktop Windows PCs

Outlook on your managed desktop Windows PC will be automatically reconfigured for your new mailbox and should be ready for use by 09:00 the next morning.
Pre-flight Checks

There’s a few things you’ll need to do to get your mailbox ready. We recommend doing some of these the week before, but some are best done at the last minute on the afternoon before your overnight migration (although you can do them all earlier if you will be away from the office during the migration).

Do checks 1–5 any time in advance...

1. **Check your Raven password is synced with the Cloud**
   
   Your Raven password must be synced with the Microsoft Cloud before you can log in to your new mailbox.
   
   Your new mailbox is part of your University of Cambridge Microsoft account. You’ll log in to this with your Raven password.
   
   You need to check that your Raven password has recently been synced to the Microsoft Cloud – if you don’t sync your password, you won’t be able to log in to your new mailbox!
   
   **How to check whether your password has been synced:**
   
   See video: [https://help.uis.cam.ac.uk/check-uis-password](https://help.uis.cam.ac.uk/check-uis-password)

2. **Check your Lookup entry**

   1. **Check your @cam delivery address is set to firstname.lastname @admin.cam.ac.uk**

   The @cam delivery address field can’t be left blank. Make sure your email is set to `<firstname.lastname>@admin.cam.ac.uk`

   **Check your Lookup page:**
   
   [https://www.lookup.cam.ac.uk/self](https://www.lookup.cam.ac.uk/self)

(If your password hasn’t been synced in advance, you will have to do it on the morning after migration and there will be a delay of upto three hours before you can log in to your new mailbox, as this is how often passwords are synced with Microsoft’s access control server).
How to edit your @cam delivery address:

See video: https://help.uis.cam.ac.uk/uas-check-lookup

1. Click the Edit button and scroll down to the @cam delivery address section
2. From the Value drop-down menu, select Other:

   * @cam delivery address: | Value: Other...

3. Edit your email address as follows:

   * Other... ➔ firstname.lastname@admin.cam.ac.uk

4. Click Save.

2. Is your Display Name what you want to be shown in the University-wide Global Address List (the ‘GAL’)?

While you are in Lookup, you might want to edit your Display Name because this is what gets shown in Exchange Online’s University-wide address list (see p. 11).

For example, if your Display Name is ‘Dr. A. Other’, you will show up in the address list’s default search under ‘D’; if your Display Name is ‘Ann Other’ you will show up in the search under ‘A’.

Check your Roaming Profile quota [UAS PC users only]

If your Roaming Profile is nearing or over its quota your new email settings won’t get updated.

Your Roaming Profile stores settings on your computer that follow you when you log in on different computers. If your profile is too large it will fail to sync when you log off. This will be a problem when we update your settings for Exchange Online.

How to check your Roaming Profile:

1. See the icons at the bottom right of your screen – you may need to click the yellow up arrow icon to expand them:

   * Normal: no action required
   * Nearing quota: clear any files you can from your desktop and save them to your network drives.
   * Over quota: follow these instructions: https://help.uis.cam.ac.uk/roaming-profile

But I’ll be away when my email is migrated!!

Don’t Panic! If you can, do all the pre-flight checks before you leave, then use webmail if you need remote access to your new mailbox while you’re away.
Note the email addresses of your shared mailboxes

You’ll need to know these email addresses in case you have to add them back into Outlook later.

Shared mailboxes in your institution will be migrated with your mailbox and appear in Outlook automatically, but you will have to manually add back any shared mailboxes that have not been migrated yet.

To find the email address of a shared mailbox in Outlook:

1. Create a New email.
2. In the To field, start typing the name of the shared mailbox – Outlook should auto-complete its Display Name using the UAS address book.
3. Right-click on the mailbox’s Display Name.
4. Select Open Outlook Contact...
5. Note down the email address.

Make Contacts for your:

1. email distribution lists
2. external email addresses

Many University-wide email distribution lists do NOT appear in Exchange Online’s built-in address book so you won’t find them using the search or auto-complete after you migrate.

All the email addresses ‘remembered’ for you by Outlook’s Auto-Complete feature will be deleted during migration.

To avoid losing track of any of your distribution lists or external email addresses, make them into Contacts in your Outlook address book:

Distribution lists in Exchange Online:
https://help.uis.cam.ac.uk/email-distribution-lists

Quickly add new Contacts in Outlook:
https://tinyurl.com/yd2tlhvz
Get Clear for Take-off...

Do steps 6–8 the last time you use your email before it’s due to be migrated – by 6pm on Monday 10 December at the latest!

6 Delete Outlook’s Auto-Complete List cache

You MUST delete the addresses saved in your Auto-Complete List – they won’t work in Exchange Online (even though it looks like they do!).

After your mailbox has migrated, any email you send using the old information in Outlook’s Auto-Complete List will not get delivered – and you won’t get an error message!

(Don’t worry, your colleagues’ email addresses haven’t changed – it’s just the way Exchange Online delivers them behind-the-scenes in that is different.)

How to clear Outlook’s Auto-Complete List cache

https://help.uis.cam.ac.uk/clear-outlook-cache

7 Empty your Drafts and Outbox folders in Outlook

If you have any messages saved in Outlook’s Drafts or Outbox folders they will not get migrated because they are only saved on your computer and not on the email server.

If you want them to be migrated, you must drag-and-drop them into your Inbox folder, (or another sub-folder within that).

8 PC users: shut down your PC

Shut down your PC when you leave so that Outlook will automatically get updated with your new profile settings when you start it up again.

(If you forget, you will need to re-start your PC in the morning and wait while the new Outlook profile downloads, so your downtime will be that little bit longer.)

6pm – stop using your email

Stop using your email from 6pm so that there are no conflicts while your data is being copied to your new Exchange Online mailbox. Your new mailbox will be ready from 9am tomorrow morning.
Post-migration wash-up tasks

There are a few things to do to clean up after the migration and get Outlook back to normal.

New email login credentials

When you log in to your Exchange Online email account you must use your University of Cambridge Microsoft account credentials:

**Username = CRSid@cam.ac.uk**

**Password = Raven password**

Logging in to Outlook (desktop)

You may need to go through all these steps; if not, just skip to step 4:

1. In the Welcome screen, click Next.
2. In the Add email account screen, click Next.
3. In the Auto setup screen, click Next.
4. Log in with your CRSid@cam.ac.uk email address and Raven password; tick the Remember my credentials checkbox and click OK.
5. If you get a confirmation screen, click Finish.
6. Outlook will open your new mailbox.

**NOTE:** It may take a little while for all your shared calendars and mailboxes to sync.

Logging in to webmail – the Outlook Web App (OWA)

1. Go to the Outlook Web App: [https://outlook.office365.com](https://outlook.office365.com)
2. In the Microsoft Sign In screen, enter your email address as CRSid@cam.ac.uk and click the Next button:

   ![Microsoft Sign In](MicrosoftSignIn.png)

2. You will be redirected to the University of Cambridge login screen. Enter your Raven password and click Sign in:

   ![University of Cambridge Login](UniversityOfCambridgeLogin.png)

3. The Outlook Web App will open and display your new mailbox.
Getting Outlook back to normal

Outlook on your desktop PC will now connect to your new mailbox automatically, but a few things still need to be done to get your mailbox back to how it was:

1. Enable your email signatures

Your email signatures should have been copied into your new mailbox, but you’ll need to re-enable them in Outlook:

Create and add a signature to messages (Outlook 2013)

https://tinyurl.com/y7t5u8kx

If you also use the Outlook Web App (OWA) webmail client, you’ll need to recreate your signatures there, too:

Create and add a signature in Outlook Web App (webmail)

https://tinyurl.com/ya62jo33

2. Add any missing shared mailboxes and calendars, and/or personal archives

You will need to know the email address of each shared mailbox/calendar/archive that you use (i.e. not just it’s Display Name)

Adding a shared mailbox/calendar or personal email archive in Outlook

Your shared resources and your personal email archives should automatically appear in Outlook, but if not, see:

https://tinyurl.com/ya3858qf

Finding the email address of your personal email archive mailbox

Search on your name in Outlook and open your Contact listing to see all your email addresses. Most archive email addresses are:

firstname.lastname@emailarchive
@admin.cam.ac.uk

How to access a shared mailbox that has not been migrated (Exchange On-Premise)

When connecting to an Exchange On-Premise (unmigrated) shared mailbox, you will be prompted to log in – use your CRSid and your computer password:

https://help.uis.cam.ac.uk/shared-mailbox-access
Sorting out any post-migration problems

IT staff will be available to help you with any problems after your migration. If you can’t log in to your new mailbox, follow these instructions BEFORE asking for help...

1. Check you’re using the right login credentials

Are you are using your **CRSid@cam.ac.uk** email address and your **Raven** password?

2. If you still can’t log in, you MUST run through these self-help tests BEFORE asking for help

These steps will probably fix your issue, but if not, the test results will enable us to help you more quickly:

   https://help.uis.cam.ac.uk/uas-troubleshooting

3. If that didn’t work, it’s time to ask for personal support

**On-site support on Tuesday 11 December**

IT support staff will be available in the Great Ouse Meeting Room from 8.30am if you need personal help.

**UAS Service Desk (for after 11 December)**

Ongoing support is provided by the UAS Service Desk. If you raise a ticket, be assured **we will** get back to you as quickly as possible – please don’t contact us again to chase up, as this slows down our response time!

**e. servicedesk@uis.cam.ac.uk**
Getting used to the University’s Global Address List (GAL)

Exchange Online uses the University-wide Global Address List (GAL) which contains everyone in the University and all the public distribution lists. You will see a lot more suggestions appearing in Outlook’s Auto-Complete List, however the listings contain less information about each individual than you are used to (e.g. no job titles or institutional information).

**Using the search to find people**

Outlook’s default search reads from left to right as you are typing your query, so if you search for ‘Ann Other’, but she has chosen to be listed as ‘Prof. A. N. Other’, you won’t get any suggestions because the search will only show results for ‘A…’, while she is filed under ‘P’.

You can change the default search behaviour so that Outlook searches more broadly, making it easier to find people amongst the University’s many Doctors and Professors using either their title, full name or initials.

*Searching for colleagues’ email addresses (Windows)*
https://help.uis.cam.ac.uk/search-windows

*Searching for colleagues’ email addresses (Mac)*
https://help.uis.cam.ac.uk/search-mac

*Controlling how your name is displayed in the Exchange Online address book*
https://help.uis.cam.ac.uk/eol-display-names
Getting started with Exchange Online email

Here’s a few tips to help you get used to some differences in your new mailbox in Outlook.

**Email distribution lists**

The University-wide Global Address List (GAL) (see p.11) **does not include distribution lists that have not been made public.** This is why it is advisable to save your frequently used distribution lists as Contacts before migration (see p.6). The GAL only includes public lists.

Anyone in the University using Exchange Online can see the full list of @cam recipients in these lists, but **all the external email addresses in distribution lists are kept hidden.**

**Changing the Display Name of your mailbox folder in Outlook**

Under some circumstances, the name of your mailbox folder in the sidebar of Outlook may display as **Your.Name@institution.cam.ac.uk.** This is purely cosmetic and does not affect sending/receiving emails, but you can change it as follows:

1. File > Account Settings
2. Double-click the profile name
3. Click More settings
4. Edit the display name
5. Click Finish to save.

**Spam and quarantined messages**

At first you may feel like you are getting more spam than you did before.

Exchange Online uses the Exchange Online Protection (EOP) spam and malware filtering system. Incoming emails are assessed using both EOP’s own Spam Confidence Level rules and the SpamAssassin scores assigned by our own incoming email filtering which happens before email is forwarded to the Exchange Online email system.

Any item of Exchange Online mail that is ranked at a value of five or higher by either of these checks is sent to a central quarantine area, where it is retained for 15 days before being deleted by Microsoft.

If any of your mail is put into quarantine, you will get an email from **quarantine@messaging.microsoft.com** inviting you to review the message(s) and either release them to your inbox or confirm them as spam.

Doing this teaches Exchange Online what is spam (for everyone), so over time you (and everyone else) will get less of it.

Quarantined messages in Exchange Online: [https://help.uis.cam.ac.uk/exchange-quarantine](https://help.uis.cam.ac.uk/exchange-quarantine)
Using rules to filter your email

You can create your own rules to help you work more efficiently, for example:

*How to block email from a specific address*
https://help.uis.cam.ac.uk/outlook-block-address

*How to flag all new emails from a specific address as ‘important’*
https://help.uis.cam.ac.uk/outlook-flag-important

*How to create a new mail folder and automatically move new email from a specific address into it*
https://help.uis.cam.ac.uk/outlook-move-to-folder

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**Outlook Mobile app: be VERY careful when adding events to your personal calendar by clicking a link in an email!**

When you tap on a date in an email to create an event in your calendar, the Outlook Mobile app automatically adds EVERYONE who got that email as required attendees of your new event, and it will send them an invitation. This can be very embarrassing if the email was sent to a large distribution list!

The only workaround is to remember to delete the unwanted attendees before you save the new event to your calendar.

**Outlook mobile app: how not to invite everyone in an email thread to your personal events**
https://help.uis.cam.ac.uk/outlook-app-auto-invite
Setting up your personal devices to connect to your new Exchange Online mailbox

If you use a mobile phone, tablet, laptop or a Mac to connect to your email, you will need to change the settings in your email app so that it connects to your Exchange Online mailbox. Follow these instructions...

**UAS laptop PCs**

If you use a work laptop running the UAS managed desktop software, you’ll need to download a new Outlook profile for Exchange Online:

1. Connect your laptop to the office network.
2. Reboot.
3. Log in to your laptop as usual.
4. Open Outlook and log in with your CRSid@cam.ac.uk email address and Raven password (see page 8).

**Windows devices**

*How to configure Outlook – for UAS staff*
https://help.uis.cam.ac.uk/outlook-for-uas-staff

*Outlook (first time set-up)*
https://help.uis.cam.ac.uk/outlook-win10-first-run

*Outlook (if you were already using it)*
https://help.uis.cam.ac.uk/outlook-win10-reconfig

*Windows Mail (first time set-up)*
https://help.uis.cam.ac.uk/exchange-mail-win10-new

*Windows Mail (if you were already using it)*
https://help.uis.cam.ac.uk/exchange-mail-win10-existing

**Windows Phone**

*Outlook in Windows Mobile 10*
https://help.uis.cam.ac.uk/outlook-winmobile10

*Outlook in Windows Mobile 8.1*
https://help.uis.cam.ac.uk/outlook-win-phone8.1
No time to set up your devices now? Use webmail!
If you don’t have time to set up your personal devices immediately, you can always use a web browser to access your email via the Outlook Web App (webmail) at:
https://outlook.office365.com

Apple devices

Macs (OS X/macOS)

Outlook in macOS 10.12 (Sierra) and earlier Mac OS X versions
https://help.uis.cam.ac.uk/outlook-mac-os

Apple Mail in Mac OS X 10.11 (El Capitan) and later
https://help.uis.cam.ac.uk/mail-elcapitan

Apple Mail in Mac OS X 10.9 and 10.10 (Mavericks and Yosemite)
https://help.uis.cam.ac.uk/mail-mavericks-yosemite

iPhone/iPad (iOS)

Outlook on an iOS 11.x device
https://help.uis.cam.ac.uk/outlook-ios

Mail on an iOS 11.x device
https://help.uis.cam.ac.uk/mail-ios

Android and Active Sync devices

Outlook app on Android 6.x and ActiveSync devices
https://help.uis.cam.ac.uk/outlook-android-6

Native mail app on Android 6.x and ActiveSync devices
https://help.uis.cam.ac.uk/mail-android-6

Generic settings

Generic settings for Exchange Online
https://help.uis.cam.ac.uk/exol-generic-settings
Training resources

**Online resources**

There’s lots of tutorials available on the internet if you search.

We’ve collated some links to videos explaining some common tasks here (for Windows, Mac and iOS):

https://help.uis.cam.ac.uk/exchange-online-training

**Ongoing help & support**

**Self-help**

If you are having problems connecting to your new mailbox after migration, you should run through these diagnostic tests before asking for help. For most people, these steps will probably fix the issue, but if not, the test results will enable us to help you more quickly:

https://help.uis.cam.ac.uk/uas-troubleshooting

Once you have successfully connected to your new mailbox, our troubleshooting documentation may be the quickest way to find the answer to any other problems:

**General Exchange Online tips**

https://help.uis.cam.ac.uk/exchange-troubleshooting

**UAS Service Desk**

In future, the UAS Service Desk staff will be happy to help you. They are available from 08:30 to 17:00, Monday to Friday:

e. servicedesk@uis.cam.ac.uk

t. (01223) (3)32999

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**Can we improve this guide or our set-up instructions?**

If you think we could make this guide better or improve our help documentation, please tell us how by emailing Anna Halfpenny in the UIS Comms Office at comms@uis.cam.ac.uk.