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| **CHECKLIST 1: BEFORE THE CONVERSION** | **OUTLOOK USERS** | **ALPINE USERS** | **SMARTPHONE USERS** |
| 1. **Know your 365 email conversion date**
	* Make a note of it on your calendar
	* Plan to not use email during the conversion weekend (process starts Friday at 5pm, and finishes Monday, 6am)
	* If you must use email on that weekend, use the new Office 365 web application
 | **X** | **X** | **X** |
| **2. Bookmark this link in your browser:** [Help & Training Resources](https://itconnect.uw.edu/connect/email/modernization-overview/timeline-resources/bulk-migration-toolkit/help-resources/#check) | **X** | **X** | **X** |
| **3. Do not make changes to your UW Net ID** within two weeks of your email conversion date | **X** | **X** | **X** |
| 1. **Review your UW Directory contact info**
	* This contact info will display in the new Office 365 address book [Update Directory Information for Office 365](https://itconnect.uw.edu/wp-content/uploads/2017/10/Update_Directory_GAL.pdf)
 | **X** | **X** | **X** |
| 1. **Fix email folder names:** Replace symbols and special characters with underscores
	* Remove special characters like [ ] / \ &~ ? \*|< > " # ;: +., ..
 |  | **X** |  |
| **6. Locate the new Office 365 email icon on your desktop or bookmark this link** <https://outlook.com/uw.edu>(Use UW NET ID) |  | **X** |  |
| **7. Watch** [**Video: Using Email in Office 365 Outlook Web Access (3 mins)**](https://itconnect.uw.edu/wp-content/uploads/2017/12/Using_Email_OWA.mp4)Save video locally and then open to play (no sound, just text) |  | **X** |  |
| **8. Alpine-only users:** [**export Alpine Contacts**](https://itconnect.uw.edu/wp-content/uploads/2017/10/Export_Contacts_Alpine.pdf) (you will import into Outlook 365 later) Video walkthrough: [**export Alpine Contacts**](https://itconnect.uw.edu/wp-content/uploads/2017/12/Export_Contacts_Alpine.mp4) |  | **X** |  |
| 1. **Outlook users: Contacts, Email, Calendar, Tasks will transfer over, Color Categories will not**
* Contacts: Optional - save a backup of contacts. [Export Outlook Contacts](https://itconnect.uw.edu/wp-content/uploads/2017/10/Export_Contacts_Outlook_Desktop_2010.pdf) (Outlook 2010)
* Email: Know that if using Outlook Desktop, you’ll need to do 2-3 steps of [initial setup](https://itconnect.uw.edu/wp-content/uploads/2017/10/Initial_Setup_Outlook_Desktop_2010.pdf) once conversion is complete
* Calendar: Print out a few weeks of your schedule, use to verify post conversion accuracy
* User defined color categories: Optional – save a screenshot of categories
 | **X** |  |  |
| 1. **Shared Calendar Owners: Be prepared for changes to shared calendar names and resource names (rooms, equipment)**
	* Re-grant permissions to restricted calendars
	* Notify calendar users of new Office 365 calendar name
	* Notify users of the new calendar practices, if there are any changes
 | **X** | **X** | **X** |

**CHECKLIST 2: AFTER THE CONVERSION**

|  |  |  |  |
| --- | --- | --- | --- |
| **DAY ONE FOR ALPINE USERS -** Switch to 365 Outlook Web Access | **OUTLOOK USERS** | **ALPINE USERS** | **SMARTPHONE USERS** |
| **1. Log in to Exchange Online/Office 365 (navigate to** <https://outlook.com/uw.edu>**and save preferred language/time zone.** [**Initial OWA Setup**](https://itconnect.uw.edu/wp-content/uploads/2017/10/Initial_Setup_OWA.pdf) **guide.** |  | **X** |  |
| **2. Review these Outlook Web Access resources if needed:**[365 Help & Training Resources](https://itconnect.uw.edu/connect/email/modernization-overview/timeline-resources/bulk-migration-toolkit/help-resources/#check) |  [Video: Using Email in 365 Outlook Web Access (1 min)](https://itconnect.uw.edu/wp-content/uploads/2017/12/Using_Email_OWA.mp4)[Video: Navigating Office 365](https://itconnect.uw.edu/wp-content/uploads/2017/12/Navigating_OWA.mp4) (3 mins) – Helpful info on finding your email folders which are not immediately visible |  |  |  |
| **3. A new Focused inbox is created by Office 365.** To learn more about how to use it or to turn it off, see [Focused Inbox](https://itconnect.uw.edu/wp-content/uploads/2017/10/Focused_Inbox_OWA.pdf) |  | **X** | **X** |
| **4. Revise your** [email signature for outgoing emails](https://itconnect.uw.edu/wp-content/uploads/2017/10/Set_Up_Signature_OWA.pdf) |  | **X** | **X** |
| **5. Import your Alpine contacts** [Import Contacts](https://itconnect.uw.edu/wp-content/uploads/2017/10/Import_Contacts_OWA.pdf) |  | **X** |  |
| **6. Clean up Sent folders** Alpine creates multiple Sent folders. To fix this, move sent emails into your primary Sent folder. |  | **X** |  |
| **7. Delete unusually named folders created by the conversion process.** *(e.g. .mailboxlist,.forward, remote\_pinerc, etc.)* | **X** | **X** | **X** |
| **8. Set up your smartphone to receive Office 365 email.** [Android Setup](https://itconnect.uw.edu/wp-content/uploads/2017/10/Android_Setup.pdf)  [iPhone Setup](https://itconnect.uw.edu/wp-content/uploads/2017/10/iPhone_Setup.pdf) You may set it up in advance, but new emails won't arrive until conversion starts. |  |  | **X** |
| **DAY ONE FOR OUTLOOK USERS -** Switch to 365 Outlook Desktop | **OUTLOOK USERS** | **ALPINE USERS** | **SMARTPHONE USERS** |
| 1. **Reconfigure Outlook Desktop Client,** pre-requisite: Close Outlook Desktop client application
* **Outlook 2010 Users: Start the required** [Initial Setup for Outlook Desktop](https://itconnect.uw.edu/wp-content/uploads/2017/10/Initial_Setup_Outlook_Desktop_2010.pdf) (tip: enter full email address not just username)
* **Outlook 2013-2016 Users OR Virtual Desktop (VDI) Users: Follow the required** [Manual Setup Steps](https://itconnect.uw.edu/connect/email/modernization-overview/timeline-resources/bulk-migration-toolkit/help-resources/manual-setup-new-office-365-outlook-profile/)
	+ Let Outlook run in the background all day – lock your screen instead of logging off
	+ Open a browser and use the web version of Office 365 Email on the first day to let Outlook Desktop catch up
	+ Let Outlook run in the background all day - lock your screen instead of logging off
	+ Turn down the volume as reminders for past events will pop up and ping - wait for a batch to load, and Dismiss All
	+ If you monitor a shared email account, add it back into your view after Outlook completes synchronizing [Shared NETIDs Client Setup and Use](https://itconnect.uw.edu/connect/email/modernization-overview/timeline-resources/bulk-migration-toolkit/help-resources/shared-netids-client-set-up-and-use/)
 | **X** |  |  |
| **2. Review these Outlook Desktop resources if needed:**[Navigating Outlook Desktop](https://itconnect.uw.edu/wp-content/uploads/2017/10/Navigating_Outlook_Desktop_2010.pdf) - Helpful info on finding your email folders which are not immediately visible [Opening Shared Calendars](https://itconnect.uw.edu/wp-content/uploads/2017/10/Opening_Shared_Calendars_Outlook_Desktop_2010.pdf) |  [Importing Contacts (in case they didn’t transfer](https://itconnect.uw.edu/wp-content/uploads/2017/10/Import_Contacts_Outlook_Desktop_2010.pdf)FAQ Topic: Conference Rooms, Equipment, and Shared Calendars (includes how to access calendars not yet on Office 365) | **X** |  |  |
| 1. **Review your calendaring setup**
	* Compare your calendar content in Office 365 to calendar printouts from Outlook desktop
	* Verify the transfer of recurring meetings and exceptions to recurring meetings
	* Change the room/equipment resource name on meetings you organized to the new Office 365 resource name
	* Grant others the ability to view or edit your calendar. [Setting Calendar Permissions](https://itconnect.uw.edu/wp-content/uploads/2017/10/Setting_Calendar_Permissions_Outlook_Desktop_2010.pdf) (permissions may not transfer)
	* Define your color categories and assign to your calendar events or emails
 | **X** |  |  |
| **4. Revise your** [email signature for outgoing emails](https://itconnect.uw.edu/wp-content/uploads/2017/10/Set_Up_Signature_Outlook_Desktop_2010.pdf) | **X** |  | **X** |
| **5. Setup your smartphone to receive Office 365 email.** [Android Setup](https://itconnect.uw.edu/wp-content/uploads/2017/10/Android_Setup.pdf)  [iPhone Setup](https://itconnect.uw.edu/wp-content/uploads/2017/10/iPhone_Setup.pdf) You may set it up in advance, but new messages won't arrive until conversion starts |  |  | **X** |
| **6. Clean up Sent folders** Alpine creates multiple Sent folders. To fix this, move sent emails into primary Sent folder. |  | **X** |  |
| **7. Delete unusually named folders created by the conversion process.** *(e.g. .mailboxlist,.forward, remote\_pinerc, etc.)* | **X** | **X** | **X** |