Office 365 — Email Migration Required Steps Checklist

BEFORE MIGRATION

☐ Search your mailbox for email larger than 35MB
   Office 365 does not support email larger than 35MB and any messages of this size will not be migrated. Follow the steps outlined at northeastern.edu/its/howto/search-35mb and, if necessary, save them.

☐ Clean up your mailbox
   Your transition will be easier and quicker if your mailbox is clear of clutter. Go through your Inbox and all folders, including the Sent folder, to delete any messages that are no longer necessary. Then empty your Deleted Items folder.

☐ Take inventory of any existing mailbox and/or calendar permissions
   Now is a good time to check that permissions and access are up to date on any accounts, mailboxes, folders or calendars that you have shared or that have been shared with you.

☐ Confirm with ITS any shared and/or delegate mailboxes that MUST be migrated with your group
   While migration across Northeastern is ongoing, there are known-limitation issues on some shared functions, such as calendar sharing and delegation, shared mailboxes, and email discussion lists. See northeastern.edu/its/get-helpguides/office365/important-steps/#issues for more details.

   If there are permissions that MUST be maintained during the university migration process — e.g., you are an owner or member on a shared mailbox within your immediate group, or have granted or been given delegate access to a mailbox and calendar of an immediate subordinate or supervisor — confirm with the Office 365 Migration team (Office365Migration@neu.edu) that those accounts will be migrated with your group.

☐ Work with ITS to update management of any distribution lists (groups) or shared mailboxes
   If you manage or are an admin on any distribution lists (groups) or shared mailboxes under other versions of Office, you will need a third-party tool to have access to all management controls under Office 365. Note: this tool works only on Windows; ITS is looking into a tool that is operating system independent, to allow Mac users to maintain admin capabilities. Contact the ITS Service Desk at 617.373.4357 (xHELP) or help@neu.edu prior to migration.

☐ Print this checklist
   We recommend that you print this document to have the Day of Migration required steps on hand for reference during your migration.

Next: Day of Migration →
Office 365 — Email Migration Required Steps Checklist

**DAY OF MIGRATION**

On the day of your migration, you should see no impact on daily operations — continue using your email and calendar as you normally would. Once your migration is complete, your Outlook client (2010 or 2013 for Windows, or 2011 for Mac) will pop up a window prompting you to sign in.

☐ **Update your Outlook username and password**

Office 365 requires the use of a new username to access your mailbox: [myNEU username]@northeastern.edu. This is ONLY required for Office 365 services.

*Windows* — When you see the Outlook prompt, you must follow the steps to sign in with your Office 365 username and myNEU password. Delete any text that has autopopulated in the username field and remove all references to NU Net; only your Office 365 username should be in the field. Be sure to check the box "Remember my credentials" and click OK, or you will be prompted to log in again in the future.

*Mac* — Outlook will prompt you to allow autodiscover.neu.edu to update your configuration. Check the box "Always use my response for this server" and click Allow. Then you will be guided through updating your username and password. Delete any text in the username field, then enter only your Office 365 username. Be sure to check the box "Remember this password in my keychain" and click OK, or you will be prompted to log in again in the future.

For all, we recommend that you restart Outlook as part of this process. If you find that it asks you to sign in multiple times, shut down all of your applications and restart your machine. Once your username and password have been updated, you will see a notice at the bottom of the email window saying that Outlook is connecting to the server and updating folders.

When your migration is complete, you will also be able to access your mailbox through the new Outlook Web App (OWA) site at outlook.office365.com, logging in with your Office 365 username and your myNEU password. Visit northeastern.edu/its/howto/365-owa/ for tips on Office 365 OWA settings and management.

☐ **Update your mobile device(s) settings**

If you have your email and/or calendar set to sync on any phones or tablets, you will need to update the settings to sync with the Microsoft server using your new username. Follow the instructions for your device outlined at northeastern.edu/its/howto/update-mobile-365/.

☐ **Confirm that you can access any shared and/or delegate mailboxes that were migrated with your group**

If there are shared mailboxes or delegate permissions that you know were scheduled to be migrated with your group, confirm that you can access those accounts. If you cannot, contact the Office 365 Migration team at Office365Migration@neu.edu.

☐ **Know that your mailbox may take some time to fully synchronize**

When your account is migrated to Office 365, there is a period of synchronization that can sometimes take 24-48 hours to finish, depending on the size of your mailbox. If you find it is particularly slow, it may be best to use the Outlook Web App (outlook.office365.com) for a day.