

Exchange 2003/2007 Upgrade Guide

Outlook Client Configuration

Use the following instructions to ensure you have uninterrupted access to your email both from your Microsoft Outlook application and from your mobile device(s).

Overview of the Outlook Profile Conversion

An email platform upgrade from the current Exchange 2003/2007 platforms to the new 2016 Hosted Exchange platform is being performed. This affects all Exchange mailboxes, archives, wireless devices, and applications. The detailed steps for the conversion process are outlined below under [Steps for Converting Your Outlook Profile](#).

What does this mean for me?

This means that after the upgrade occurs, you will no longer be using your old Outlook profile and will be using the new Outlook Exchange profile. This also means that you will no longer be using the old Exchange ActiveSync profile on your wireless phone (if applicable).

Who do I contact if I have an issue during my conversion?

If you are having issues with your conversion during the cutover window, please contact support.

What information will be migrated to the new profile?

- ✓ Mail
- ✓ Contacts
- ✓ Calendars
- ✓ Notes
- ✓ Tasks
- ✓ Default Categories

What information will not be migrated to the new profile?

As part of the migration process, mailbox content stored on the servers will be migrated over to mailboxes on the new servers. Please note that local Outlook profile settings and customizations may not be copied over, and if you want to migrate any of these settings you must follow the instructions outlined below.

▪ Rules

Rules will not be migrated – If you would like to migrate your rules, please follow the instructions below BEFORE your scheduled upgrade date.

Export Rules in Outlook

Outlook 2003/2007: Choose Tools > Rules and Alerts, then click Options. In the Options window, click Export Rules, and choose a file location.

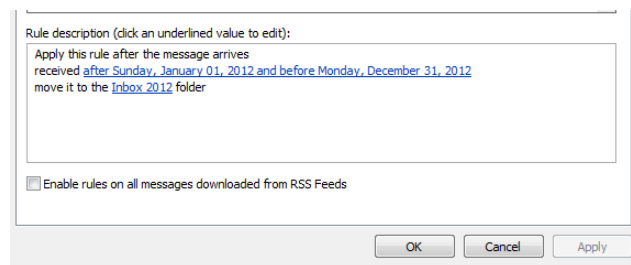
Outlook 2010/2013: On the File tab on the Ribbon, click Info > Manage Rules and Alerts, then click Options. In the Options window, click Export Rules, and choose a file location.

Once your profile is converted to the new Exchange profile import the rules into the new profile (Reverse the process to IMPORT your saved rules)

Note:

DESTINATION FOLDERS MAY NEED TO BE RE-MAPPED - Always check all the imported rules to make sure they're still active. Sometimes they're deactivated (especially in the case of rules for moving or copying to a folder) because Outlook can't be sure that the destination folder is the same as in your original rule.

OUTLOOK > RULES > MANAGE RULES & ALERTS



Outlook rules are stored in .rwz files with the name of your profile in the default Outlook directory. To open the default folder for Outlook files, go to Start > Run and insert the path below for your operating system:

XP: %USERPROFILE%\Application Data\Microsoft\Outlook

VISTA, Windows 7: %USERPROFILE%\AppData\Roaming\Microsoft\Outlook

- **Categories**

'Custom' or non-default Category Colors will not be migrated – Only default category colors are migrated. Colors that are associated with custom categories cannot be migrated at this time and users will need to reassign colors to these custom categories.

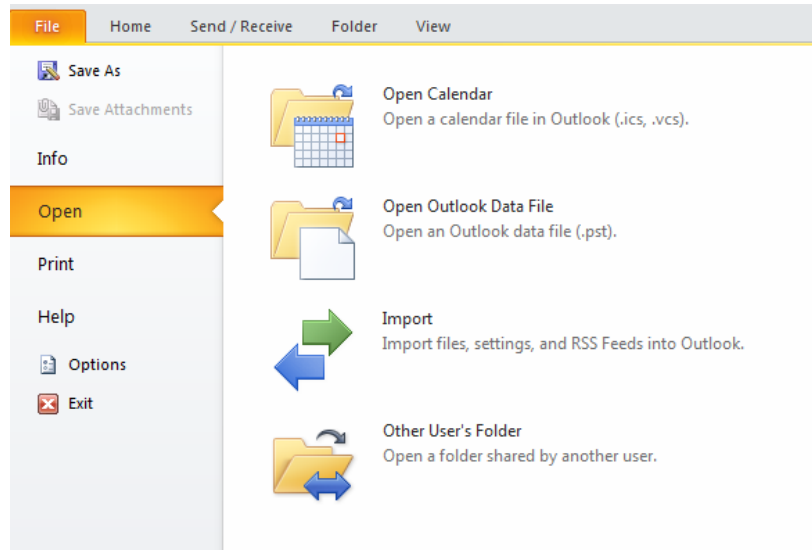
- **Local Folders (Archive)**

Local mail folders – any folders not stored on the server will not be migrated. If you are unsure about this, contact your local administrator. To add a local archive folder, follow the instructions below:

Outlook 2013: File > Open & Export > Open Outlook Data File > Browse to .pst > Open

Outlook 2010: File > Open > Open Outlook Data File > Browse to .pst > Open

Outlook 2007: File > Open > Open Data File



Follow these steps to see where Outlook is currently storing your data:

In Outlook 2010/2013:

1. Click the **File** tab on the Outlook ribbon.
2. In the **Info** category, click the **Account Settings** button, and then click **Account Settings**.
3. In the **Account Settings** window, click the **Data Files** tab.

In Outlook 2007:

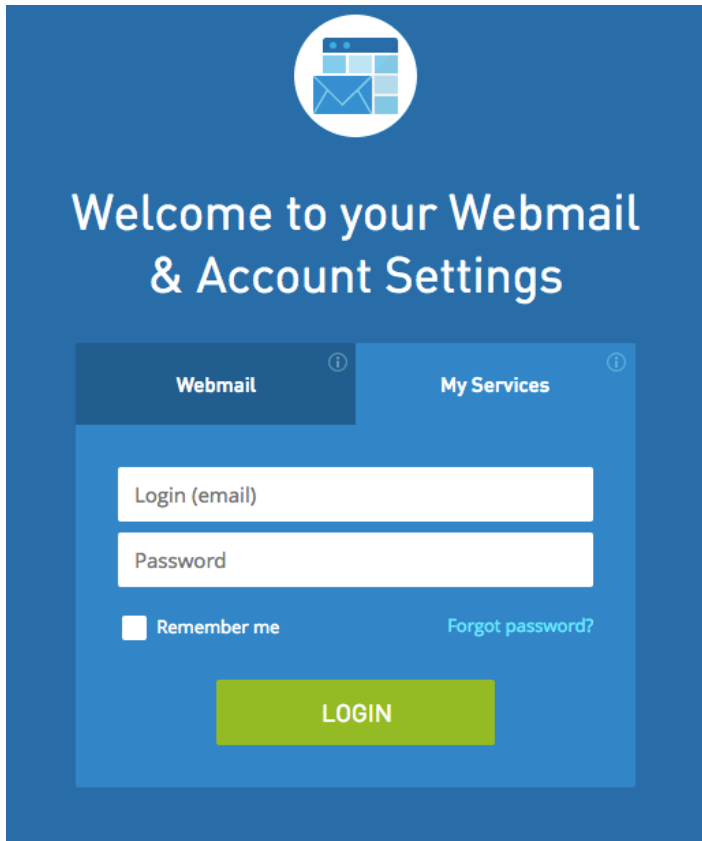
1. On the **Tools** menu, click **Options**, click the **Mail Setup** tab, and then click **E-mail Accounts**.
2. In the **Account Settings** window, click the **Data Files** tab.

FOLLOW THE INSTRUCTIONS OUTLINED BELOW AFTER YOUR UPGRADE IS COMPLETE

Steps for Converting Your Outlook Profile

1. Download Outlook Profile Helper


Navigate to <https://owa.serverdata.net/>. CLICK on “My Services”, type your email address and password.







Once you are logged in, CLICK on “Downloads and Instructions” to take yourself to the download page.


My Services Help Log Out


Email

 Exchange Mailbox Configure Email

 Distribution lists Storage Out of office assistant Email addresses



 Outlook Backup  BlackBerry® Request  ActiveSync Request

 Encrypted Message Request


Upload Photo
Edit profile
Change password

DOWNLOADS & INSTRUCTIONS


Collaboration & File Management

 PC Backup Request  Lync Secure IM Request

Under Single Sign On, click on the Outlook Profile Helper Link at the bottom

My Services: Downloads & Instructions Help Log Out

[← Back](#)


 **Single Sign On**
Single Sign-On is a small software client you download onto your PC.

- Setups Outlook profile
- Provides authentication for all your Intermedia apps, web and desktop: Outlook, OCS/Lync, SharePoint, My Services, OWA
- Allows you to upgrade Outlook to the latest version

System Requirements: Windows XP, Windows Vista, Windows 7

[Learn more & Download](#)

As an alternative option you can use [Outlook Profile Helper](#) for Outlook setup.

 **Outlook**
Use [Single Sign-On](#) to set up Outlook.

Setup Settings:

- [Entourage Web Services](#)
- [Outlook 2011](#)

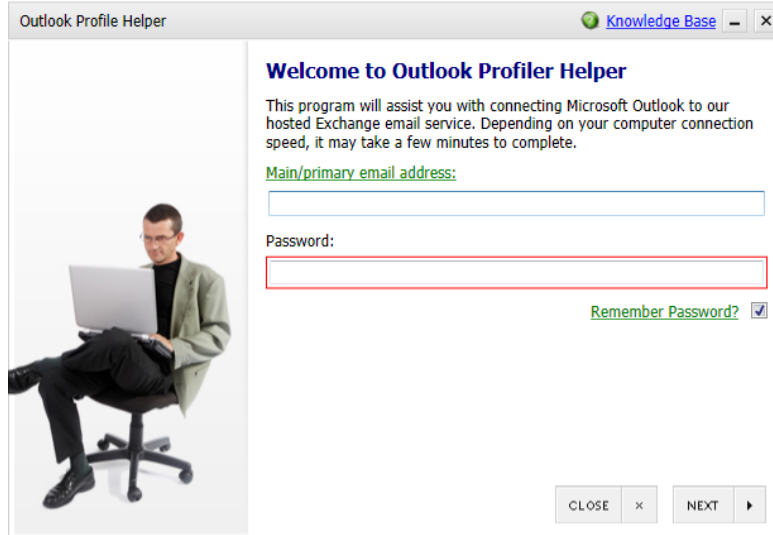
Domain: EXCH500
Exchange Server URL:

- West Site: <https://west.EXCH500.serverdata.net/EWS/Exchange.asmx>
- East Site: <https://east.EXCH500.serverdata.net/EWS/Exchange.asmx>

Once the tool is downloaded, please run the tool and continue to the next step.

2. Create New Exchange Profile

Enter your **primary mailbox address** and **password** and select NEXT. Follow the prompts as shown in the screen shots below to setup the new Outlook profile.



Outlook Profile Helper Knowledge Base

Welcome to Outlook Profiler Helper

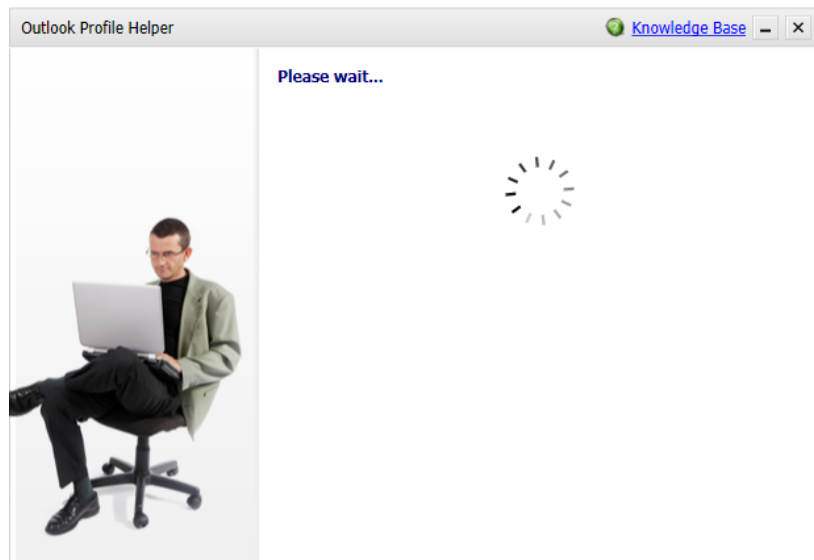
This program will assist you with connecting Microsoft Outlook to our hosted Exchange email service. Depending on your computer connection speed, it may take a few minutes to complete.

Main/primary email address:

Password:

Remember Password?

CLOSE x NEXT ▶

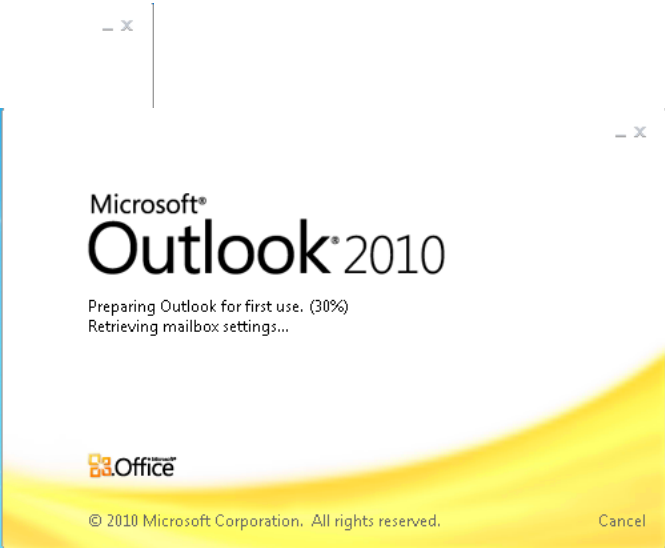
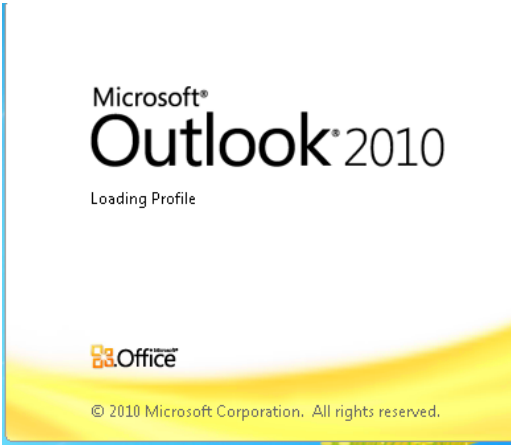
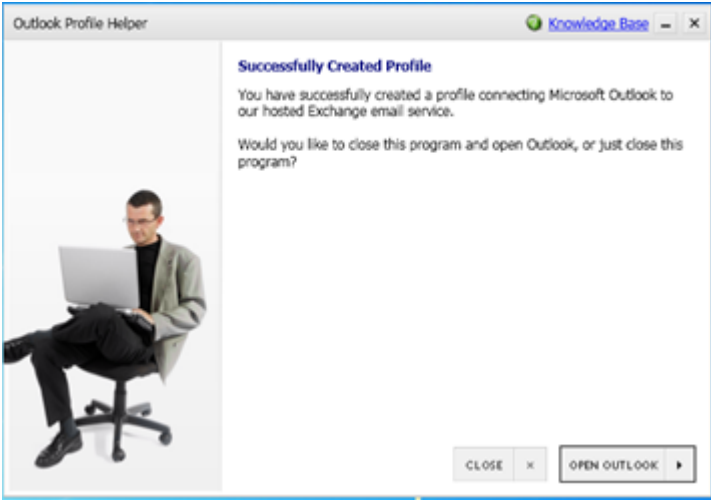


Not accepting username or password?

Try logging in as a user into webmail (OWA) via owa.serverdata.net. If you are not able to login to OWA with your primary mailbox address and password, contact your administrator for assistance with a password reset.

3. Prepare Outlook for First Use

You will be prompted to **Open Outlook** for first use. This will begin the Outlook mailbox download process as Outlook will begin to download a locally cached copy of your mailbox. You should see down at the bottom of Outlook a status of – Updating this folder. You should not use Outlook while Outlook updates its local copy, instead use OWA (login as a user to owa.serverdata.net with your primary mailbox address and password).



4. Use webmail (OWA) while Outlook builds profile

Login as a user to owa.serverdata.net

OUTLOOK WEB ACCESS & USER ACCOUNT SETTINGS

- My Services settings for your mailbox
- Outlook Web Access (OWA)
 - Public or shared
 - Private computer

Email

email@domain.com

Password

Remember email address
 Remember email address and password
 Use Outlook Web Access Light

Sign In

You should use OWA until Outlook is finished downloading its local copy and the Outlook status at the bottom shows – **ALL FOLDERS ARE UP TO DATE.**



If you continue to experience issues with your Outlook profile conversion. Please contact support with any questions or issues.