Congratulations! Your Microsoft Exchange account is about to be migrated to Office 365. The migration offers Xcentric Cloud users many additional features, including:

- A 50GB Inbox
- Additional Communication Tools (Skype, Teams, & Yammer)
- And More!

Part of this process requires users to take specific steps to ensure a seamless migration. Please read through the steps below and reach out to your dedicated CSM if you have any questions regarding this exciting time for your firm.

**A Week Before Your Migration**

1. Create an “Office Application Group”.
   a. Add all Office applications your firm utilizes day-to-day into the group.
   i. To create the group:
      1. Cloud Management > Apps > Add/Edit App Groups > Select Office Applications
   b. Add all users into this group that will need access to Office 365 applications.
   i. To add users to the group:
      1. Cloud Management > Apps > Add/Edit Users to Apps or Groups > Select the Users > Click Save/Activate

Our team will take care of transitioning this group from the current version of Office to Office 365 on the night of the migration.

**The Night Before Your Migration**

1. Log out of cloud.xcentric.com before 9pm EST time.
After Your Migration

1. Logging In
   a. Do not log into the Cloud earlier than 5 am local time.
   b. When you log in after 5 am local time, you will see Office 2016 applications installed on the Xcentric portal.
   c. You might need to select “All” in the Apps section of the portal to see every App.

2. Opening Outlook 2016
   a. Launch File Explorer first to establish a session, then launch Outlook 2016.
      i. You will need to activate Outlook 2016 by inputting your email address for this initial launch only.
      ii. When you get to the screen that shows your email address, please verify that it is your email address before moving on.
      iii. You will need to re-apply your signatures and set up any custom views.
   b. If you are unable to access Outlook in the Xcentric portal, go directly to Office 365 web access by following these directions:
      i. Click on the “Email” tab.
      ii. Click and launch “Office 365”.
      iii. You will then be able to click and open “Outlook”.

3. Deleting & Re-Adding Email to Your Mobile Device
   a. Please see additional documentation pertaining to your device.

Additional Information

- You will receive a new Email tab on Cloud Management, where mailboxes and distribution groups can be managed.
  - The Email tab > Users section is where Mailbox Forwarding, Connected Devices, Distribution Group Membership, and Mailbox Permissions can be managed.
  - When a user is deactivated, their mailbox will turn into a shared mailbox, viewable on the Email tab > Shared Mailboxes.
  - **Please search “O365 Email Tab” in “Learn” to find out more information.**
- Teams and Yammer can be requested by going to the Features tab of Cloud Management. These applications would then be available via the Office 365 portal.
• A few things will be different as it relates to dealing with a mailbox for an employee that leaves your firm. I recommend reviewing the Learn article, “DISABLING AND DEACTIVATING/DELETING USER ACCOUNTS: OFFICE 365”
  o To navigate to the Learn article, please click the button on the Xcentric portal (cloud.xcentric.com) that is called Learn.