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. Clean Up Outlook Items
   a. Empty your “Deleted Items” folder.
      i. Right click on the folder and select “Empty Folder”.
   b. Delete anything unnecessary and/or empty folders in Outlook.

2. (Optional) Take Screenshots of Current Setup
   a. You might choose to take screenshots of your custom views in Outlook in order to reference them the morning after your migration for an easier, quicker, setup.

**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

- After Outlook is opened, calendars and mail may take a few minutes to sync.
- Public folder permissions will not carry over.
- Room mailboxes/calendars can no longer directly be shared. Rooms will need to be added directly into calendar appointments. For more information about creating and managing room mailboxes within Outlook 2016, please see this Microsoft support article.
- Calendar permissions do not carry over, so shared calendars will need to be re-shared. To learn how to share an outlook calendar with other people in Office 2016, please see this Microsoft support article.
- Active out-of-office replies will be removed.
- Outlook will now only be caching emails going back 90 days.
  - To see emails further back than 90 days:
    ▪ Click “Click Here to View More on Microsoft Exchange” at the bottom of a folder.
    ▪ You can also search by keyword in “Current Folder” to bring up emails you are looking for past the 90-day cached date.
- If your firm already has Skype for Business, you will need to clear your credentials upon logging in for the first time after the migration.
  - You will need to clear your credentials upon logging in for the first time after the migration. To clear, open Skype for Business, click “Delete my sign-in
info”. If the program keeps trying to sign in with your previous credentials, you can click “Cancel Sign-In.”

- All previous versions of Skype should be uninstalled from the workstation and re-installed using these instructions.
- You should now have a new feature in Outlook called “Focused Inbox”. Please read this support article for more information and to learn how to toggle it off.