



Migration Guide for Microsoft Outlook 2007

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Prerequisites for migration

- ✓ The source Exchange account that is being migrated *from* is still active as an email account in Outlook.
- ✓ The WS Mail account for the user is also active, but not yet added as an account in Outlook.

Microsoft Exchange

Microsoft Exchange is a collaborative and messaging software product that uses a proprietary RPC protocol to communicate with supported email clients. To date, the email clients able to interact with Exchange's advanced features are Microsoft Outlook, Novell Evolution and Entourage for Mac (partial support). Mailboxes on an Exchange Server can also be accessed through a web browser, which is known as Outlook Web Access (OWA).

Note that email (not contacts, calendars, notes and tasks) hosted on the Exchange Server can also be accessed using common POP3 and IMAP4 clients, such as Mozilla Thunderbird and Lotus Notes.

If Webmail/OMA is the only access method used for a particular user, we recommend using an Outlook client to migrate the mail, as documented below.

There are 5 key components that can be migrated from an Exchange Server account to WS Mail using Microsoft Outlook. They are:

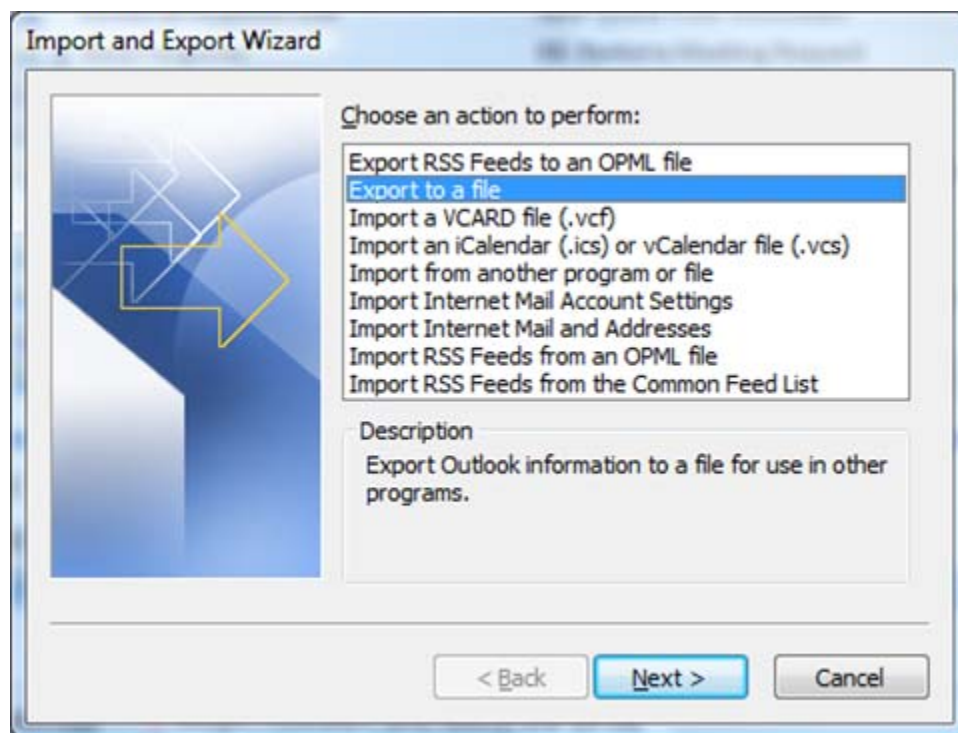
- Email
- Calendar
- Contacts (aka Address Book)
- Tasks
- Notes

After migration, Email, Calendar, Contacts and Tasks can be synced using the 'WebSync' Outlook plug-in, if desired. If WebSync is installed, the above components, excluding Notes, will be available using WS Webmail and Outlook. Notes are only available in Outlook.

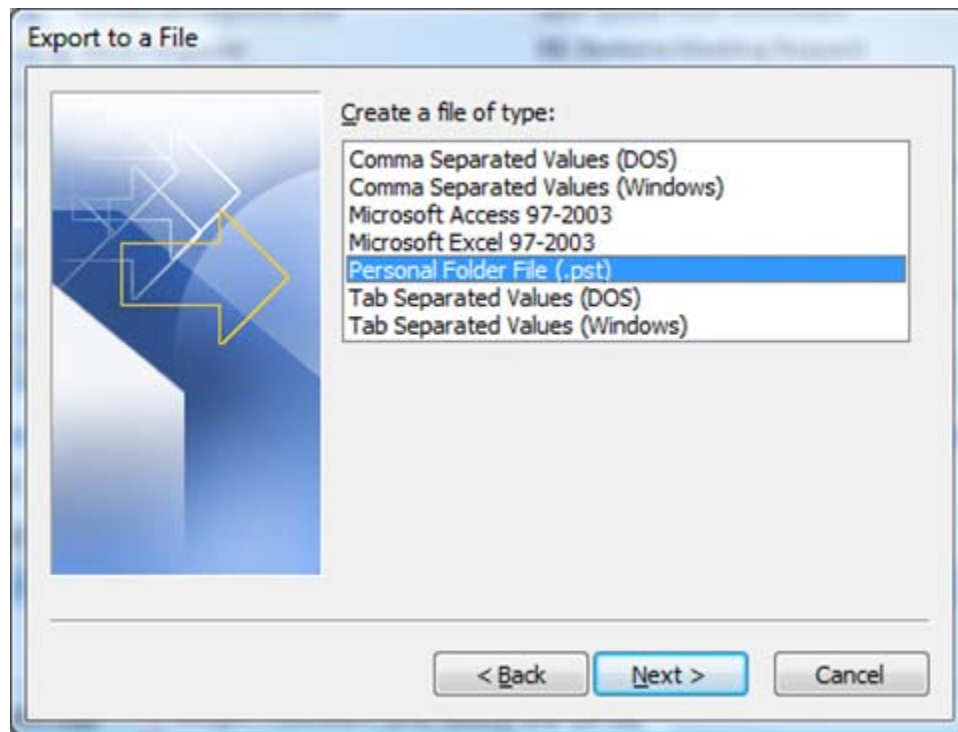
We strongly recommend printing of this document before beginning the migration steps.

Making a separate copy of Exchange mailbox data

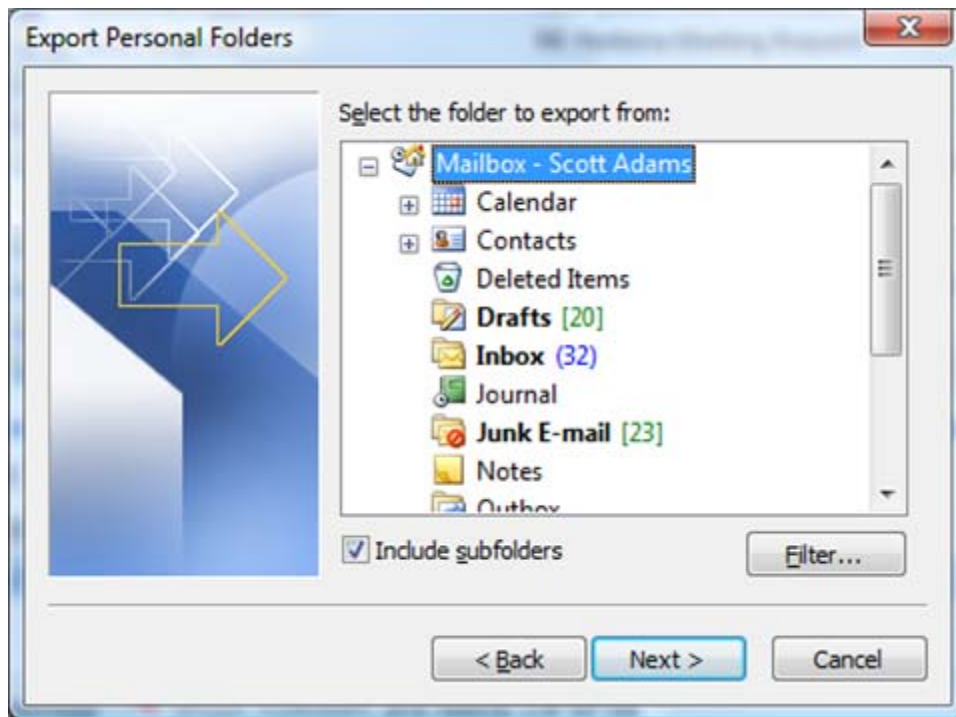
- On the **File** menu, click **Import and Export**. Click **Export to a file** and then click **Next**.



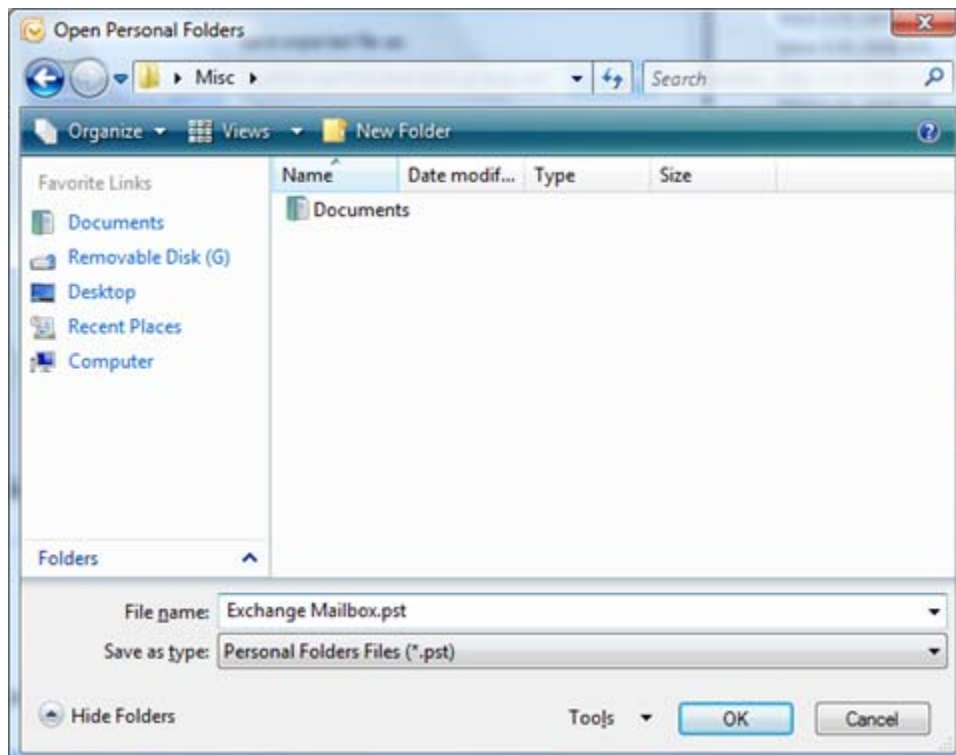
- Click **Personal Folder File (.pst)**, and then click **Next**.



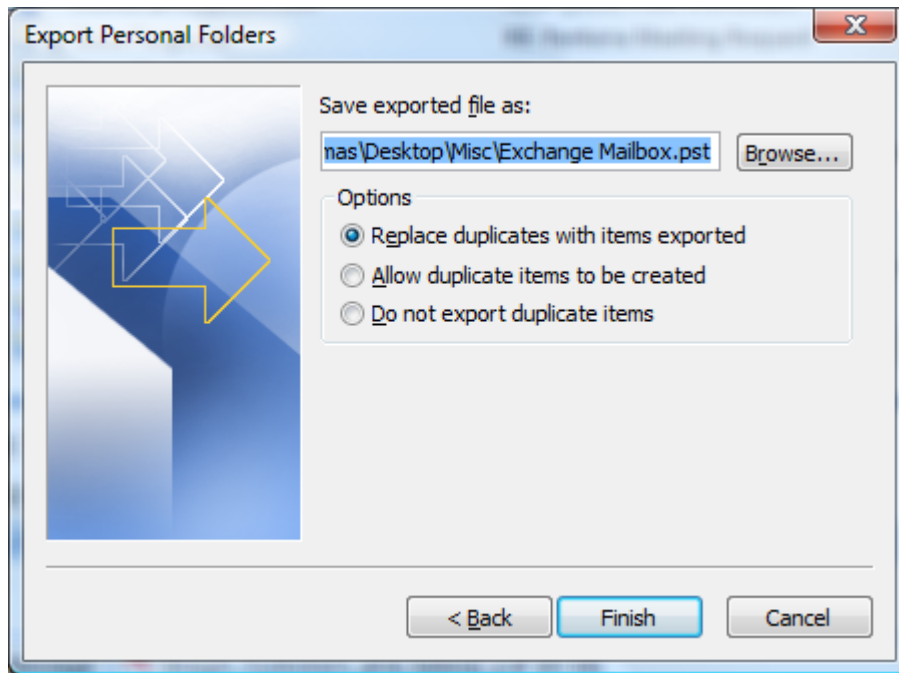
- Select the top-level Exchange mailbox folder. This folder contains all the items, including mail folders, notes, calendar, etc. For instance, if your name is Scott Adams, the Mailbox folder may be labeled as 'Mailbox – Scott Adams' or simply 'Mailbox'. Be sure to check the checkbox for **Include Subfolders** and then click **Next**.



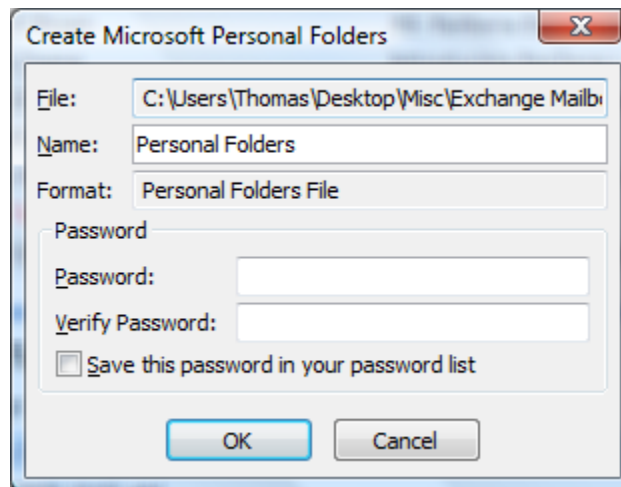
- Near the **Save exported file as** field, click on the **Browse...** button. Select a known location (such as *My Documents*) and enter a descriptive filename in the **File Name** field, such as 'Exchange Mailbox.pst'. Click **OK**.



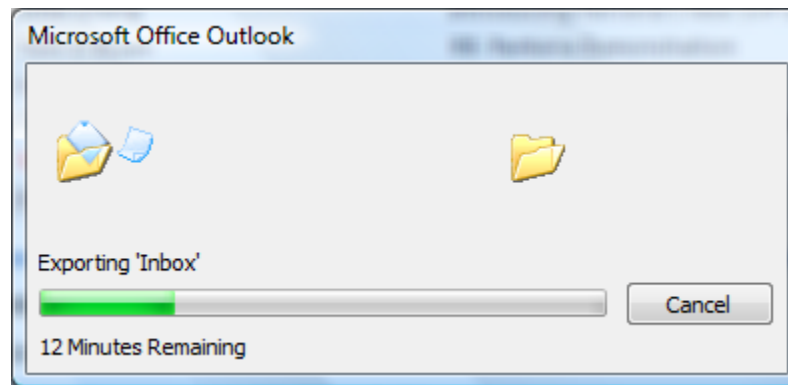
- Click **Finish** in the *Export Personal Folders* window.



- A *Create Microsoft Personal Folders* window will appear. You may optionally enter a *Password* (and *Verify Password*) to help secure your data. For simplicity, the steps documented below assume no password has been added. Click **OK**.



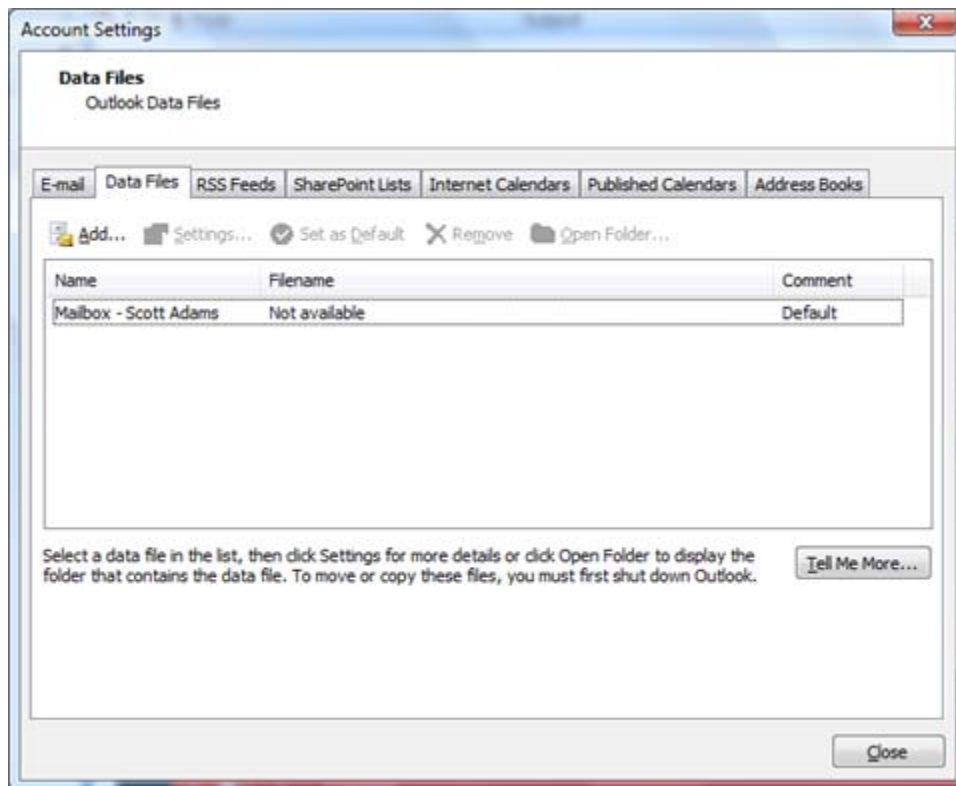
- Outlook will display progress messages as it traverses the folders. This may take an extended period of time, depending on the available bandwidth and/or the amount of data.



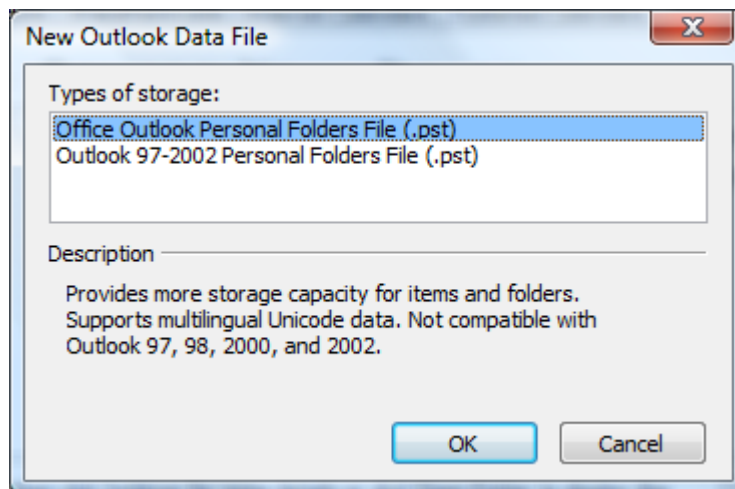
- When the file compilation is complete, copy the target file to another location (preferably on a separate workstation/server) to ensure you will retain a full unaltered backup. We suggest burning to CD or DVD, if possible.

Enabling use of the exported data file

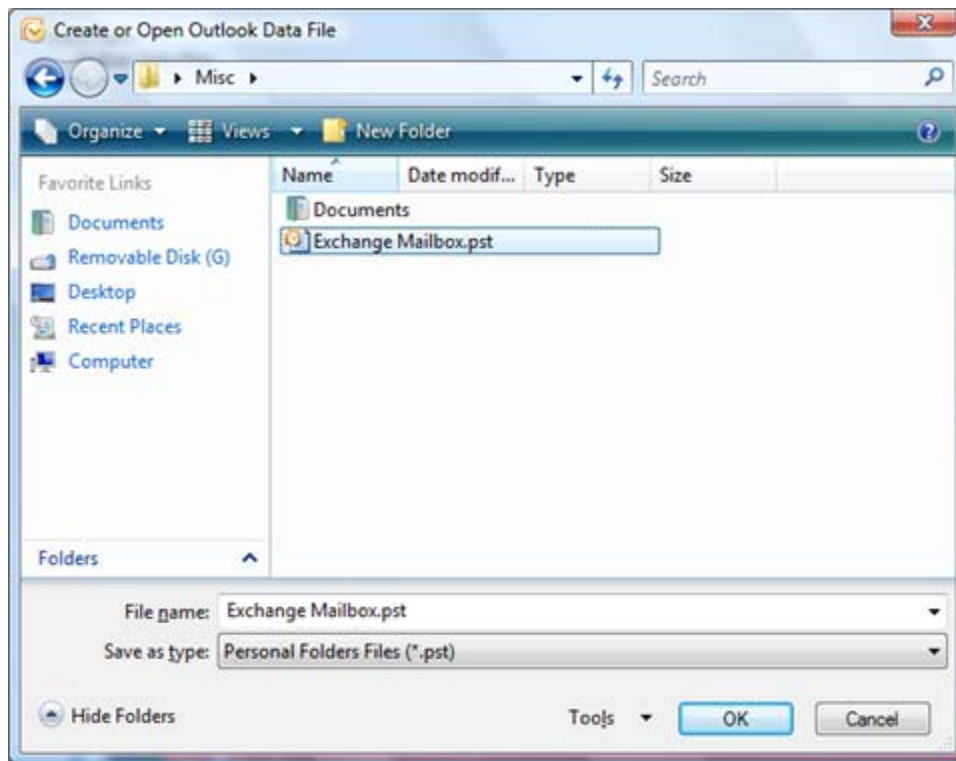
- Click on **File**, then **Data File Management**. If not already selected, click on the **Data Files** tab. Click the **Add** button.



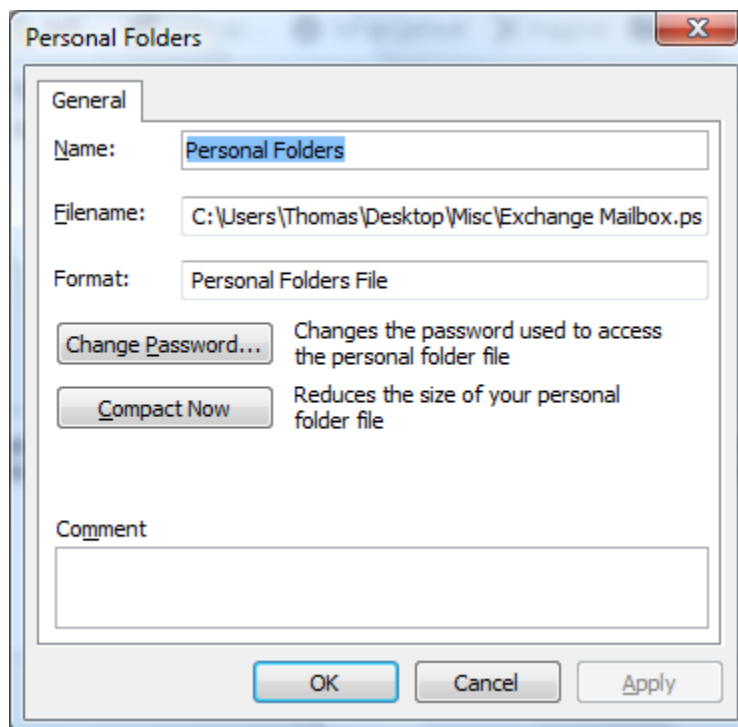
- Choose the **Office Outlook Personal Folders File (.pst)** option and click on the **OK** button.



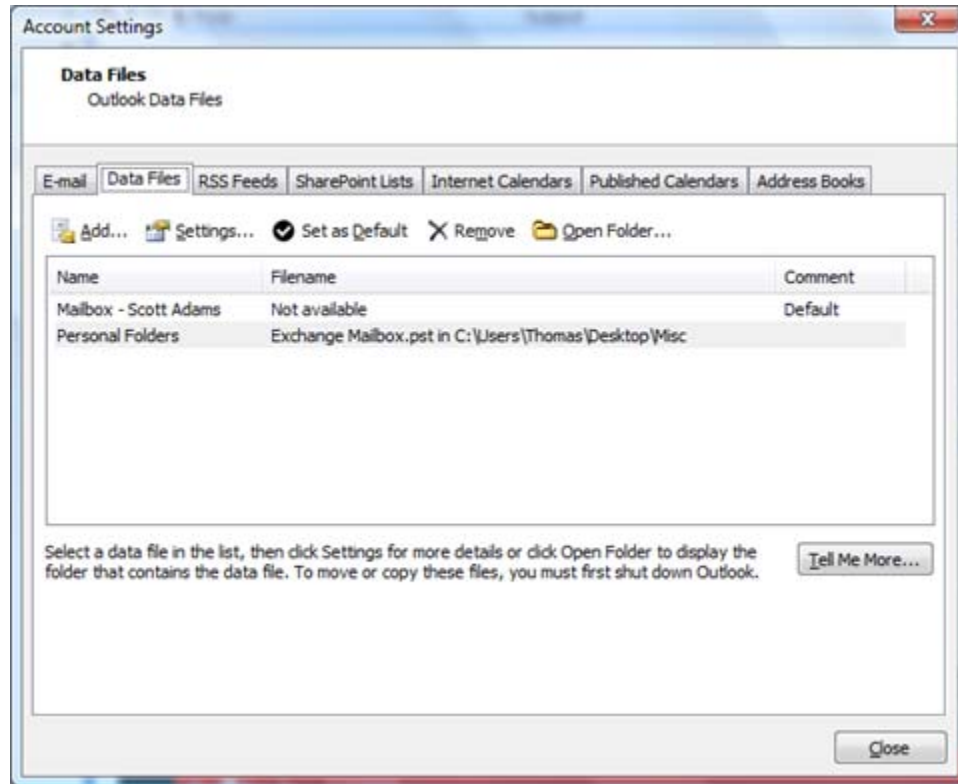
- Browse to the location where the .pst file was created, select it and click **OK**.



- A *Personal Folders* dialog box will appear. Just click **OK**.



- The file will be loaded and you'll see it listed as a data file. Click **Close** on the *Account Settings* window.



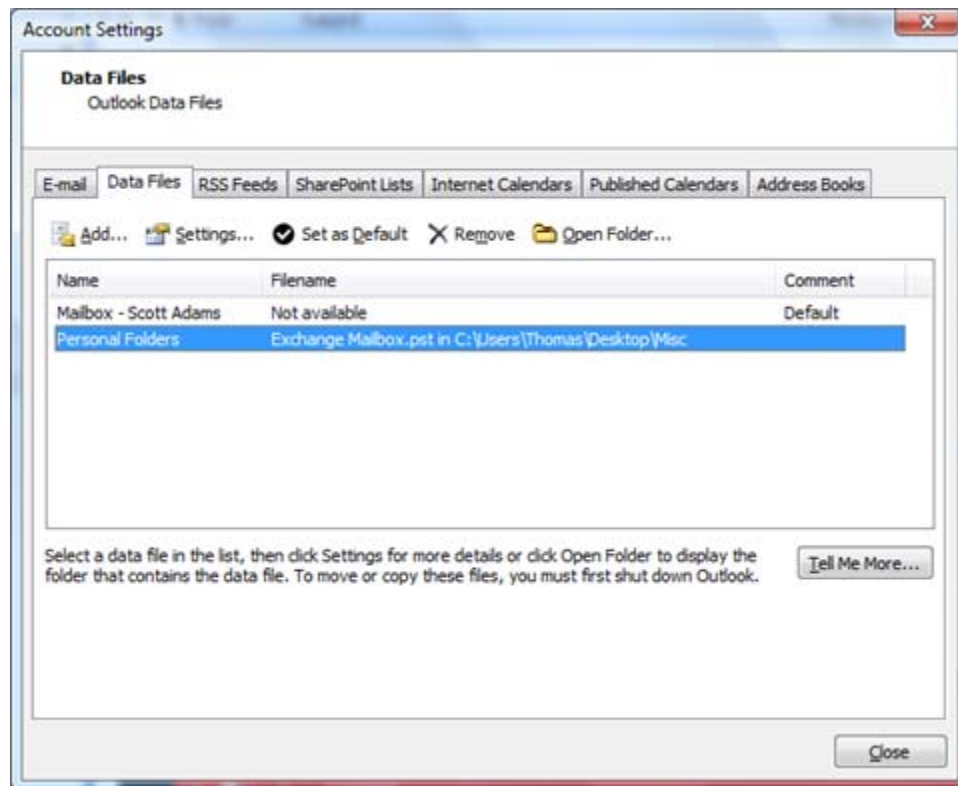
- In the *Mail Folders* list in Outlook, you should see the new folder listed. You may expand the view and click on the *Inbox* (and subfolders) to ensure your mail items are included

Adding your new WS Mail account

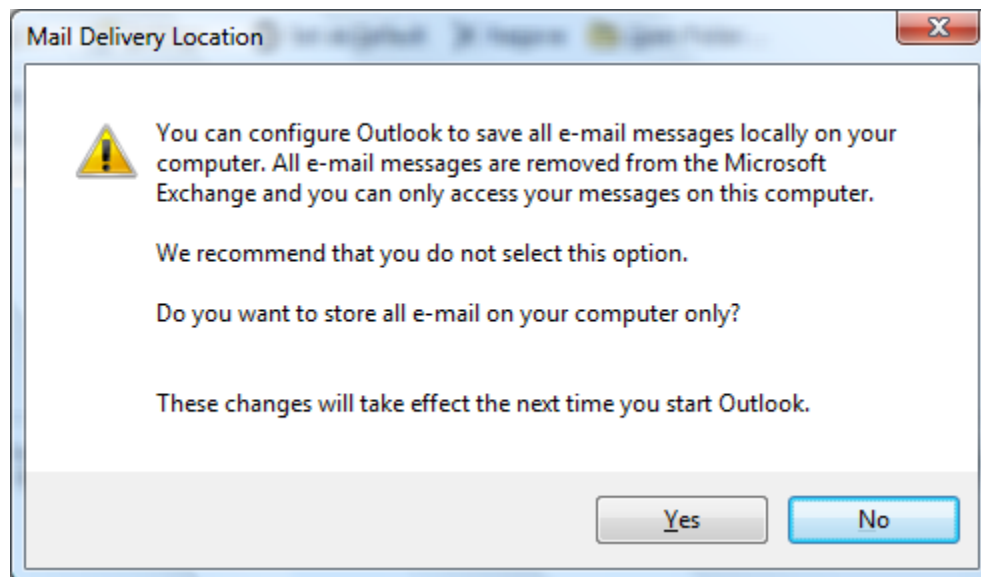
Please refer to the WS Mail Client Configuration Guide for instructions on how to add your new account to Outlook.

Setting WS Mail as your default account

- In the *Account Settings* window, click on the *Data Files* tab. Highlight the recently added *Personal Folders* (.pst file) entry and click on the **Set as Default** button.



- You will receive a message about saving files locally. Click **Yes**.



- Click **Close** on the *Account Settings* window.
- Restart Outlook.



IMAP or POP3

When transitioning from other (non-Exchange) mail services with Microsoft Outlook, the move is usually straightforward. For the easiest transition, we recommend that whether previously using IMAP or POP3 for email server access, you continue to use the same method. WS Mail supports both IMAP and POP3.

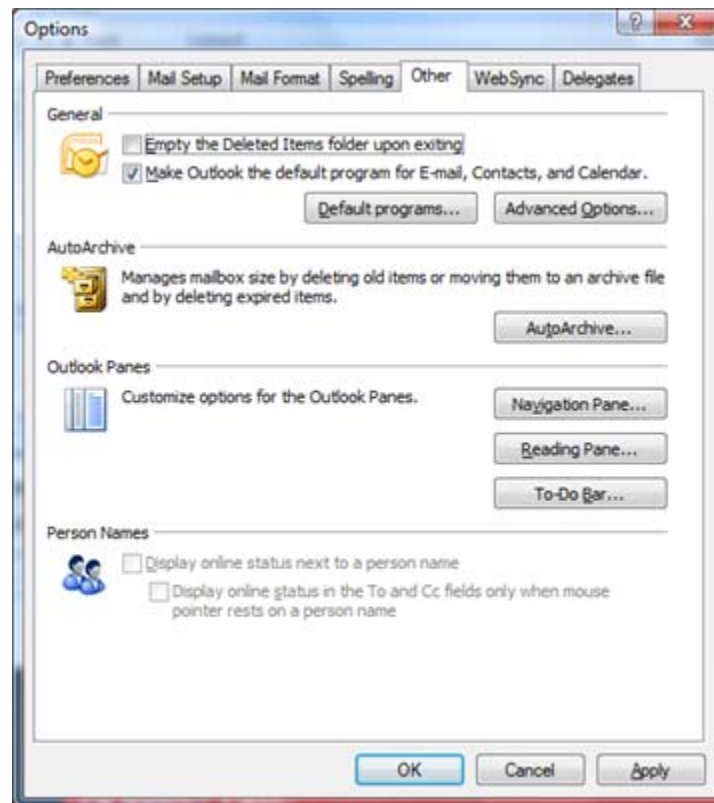
Please consult the WS Mail Client Configuration Guide for detailed instructions on how to add your email account to Outlook.

Optional items

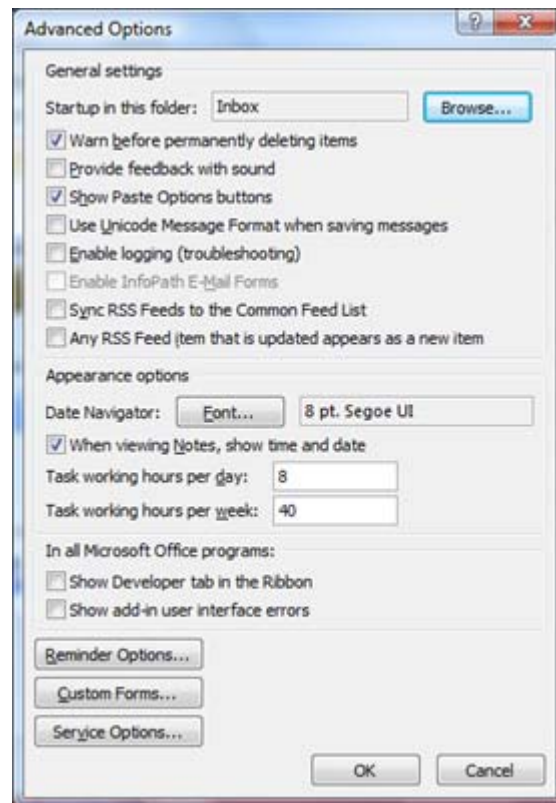
Default Inbox Assignment

If you wish Outlook to display your Inbox when started, follow these steps:

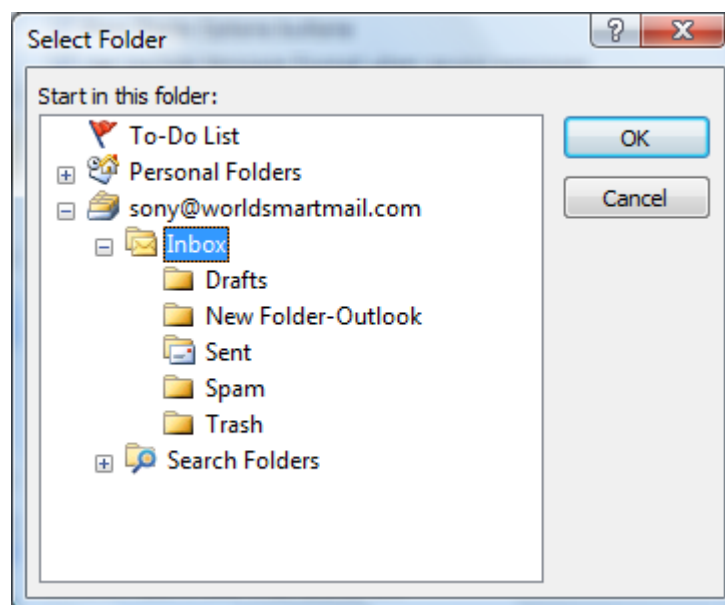
- On the **Tools** menu, choose **Options**.
- Click on the *Other* tab and choose **Advanced Options**.



- In the *General Settings* area next to the **Startup in this folder** box, click **Browse**.



- In the *Select Folder* dialog box, expand your new mail folder appropriately and select the *Inbox* folder. Click **OK** to close the *Select Folder* window.

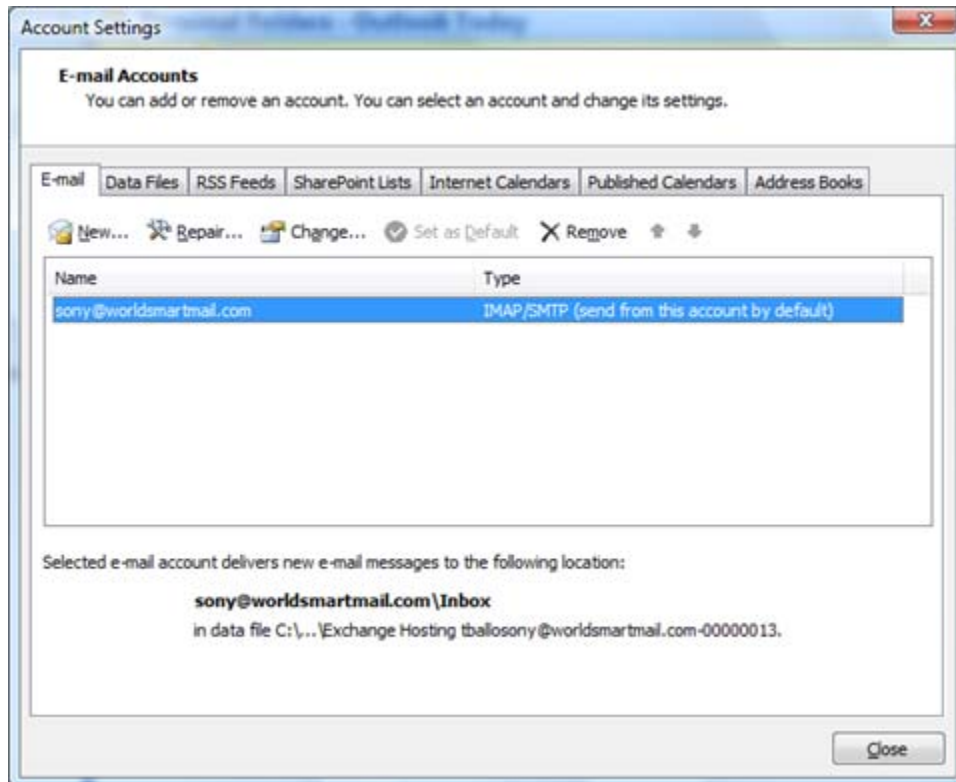


- Click **OK** to close the *Advanced Options* window, **OK** again to close the *Options* window.

- When you start Outlook, you should see your *Inbox* displayed immediately.

Assigning the Sent Items folder

- Click on **Tools** and then **Account Settings**.



- Select your new email account (IMAP/SMTP) and click on **Change**.

Change E-mail Account

Internet E-mail Settings
Each of these settings are required to get your e-mail account working.

User Information
Your Name: Sony Sanchez
E-mail Address: sony@worldsmartmail.com

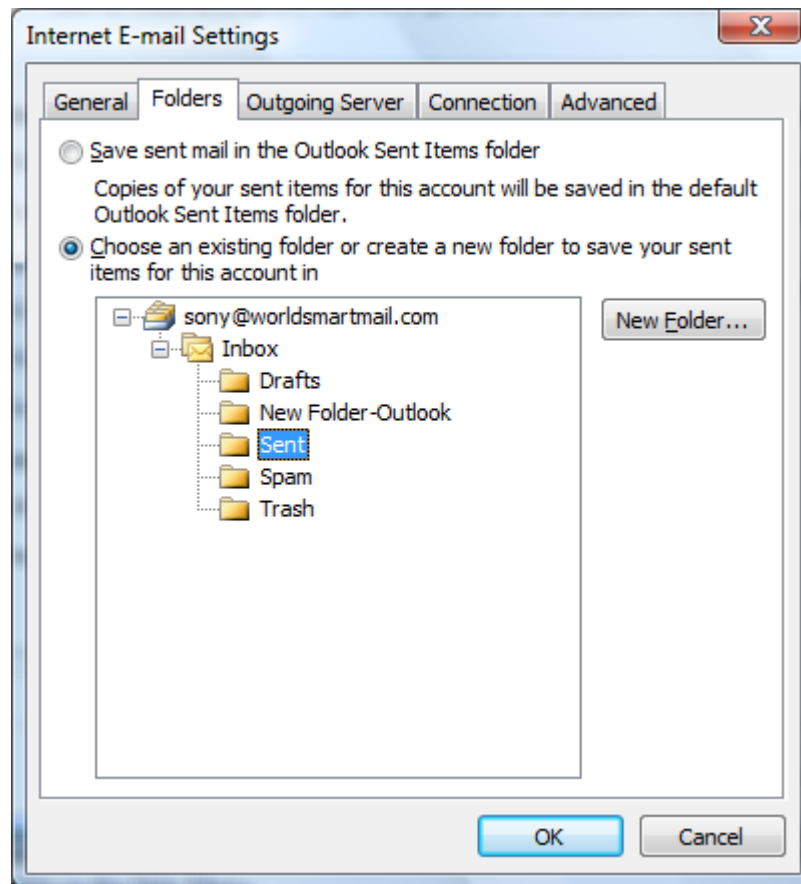
Server Information
Account Type: IMAP
Incoming mail server: email.worldsmartmail.com
Outgoing mail server (SMTP): email.worldsmartmail.com

Logon Information
User Name: sony@worldsmartmail.com
Password: *****
 Remember password
 Require logon using Secure Password Authentication (SPA)

Test Account Settings
After filling out the information on this screen, we recommend you test your account by clicking the button below. (Requires network connection)
Test Account Settings ...
More Settings ...

< Back Next > Cancel

- Click on the **More Settings** button and select the *Folders* tab. Make sure the radio button selection is set to **Choose an existing folder or create a new folder to save your sent items for this account in** option.
- Expand the folder tree and select the *Sent folder*. Now click on **OK** to close the dialog box.



- Click **Next** on the *Change E-mail Accounts* window, click **Finish** when shown the Congratulations message and **Close** on the *Account Settings* window.

Copying Previous Email Messages

You may copy previously received email into your new account. If you have multiple sub-folders in your previous Inbox, you'll need to re-create each sub-folder under your new Inbox.

To copy data from an old email folder to a new:



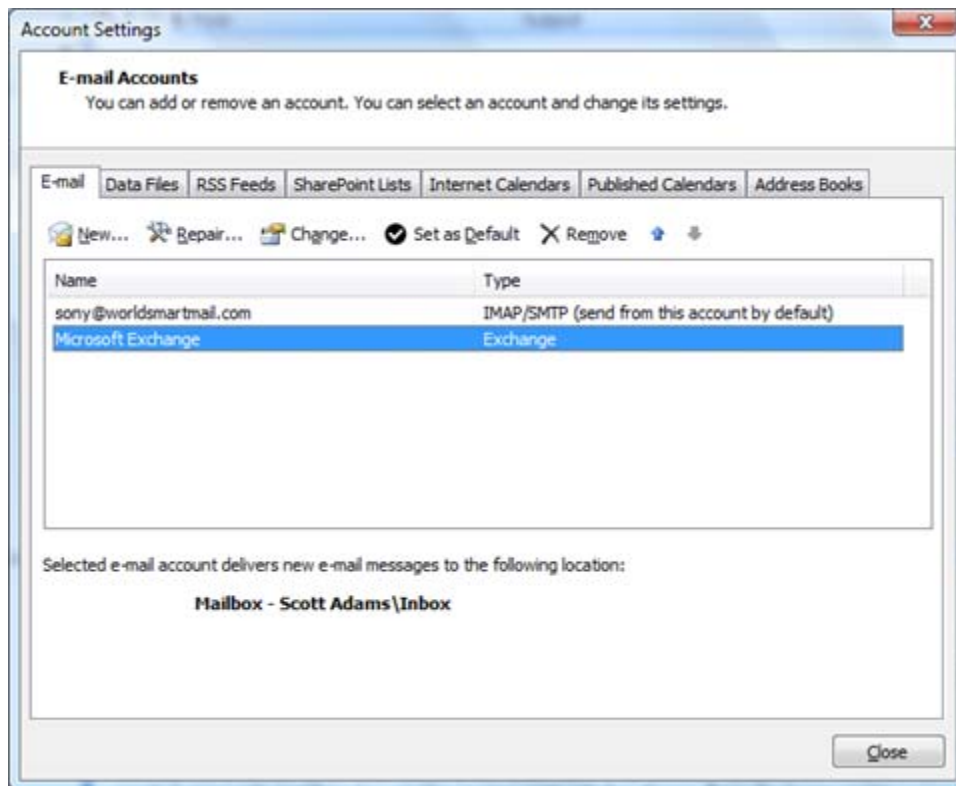
- Using the folder list in Outlook, click on the appropriate folder (i.e. *Inbox*) from the old account.
- Select the desired message, or to select all message in the folder, press *Control-A* or click **Edit** and then **Select All**.
- Press *Control-C*, or click **Edit** and then **Copy**, to store the mail items in the clipboard.
- Click on your newly created folder in your new account and press *Control-V* or click on **Edit** and then **Paste**. The copying process will begin. Depending on the number of messages, this may take some time.

Removing Previous Email Account

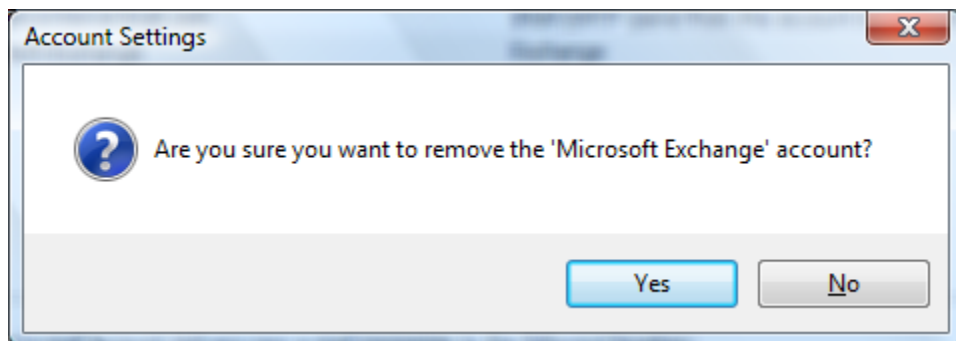
Depending on the transition plan for your organization, it may be desirable or necessary to remove the previous account. Note that POP3 email is already stored locally and will be accessible in Outlook after an account is removed. However, IMAP accounts store messages on the remote server. *If your previous account is IMAP and you wish to keep email in a file accessible locally (in Outlook), you may need to follow the instructions above to copy the email messages.*

Note that when Exchange or IMAP is removed from the Outlook accounts list, the messages and other items are still stored on the central mail server.

- Click on **Tools**, then **Account Settings**.
- If not already selected, click on the *E-mail* tab.
- Select the Exchange mailbox, which is listed as 'Mailbox – Username' or 'Microsoft Exchange'.
 - Once the folder is selected, click on the **Remove** button.



- A dialog box will appear asking you to confirm. Click **Yes**.



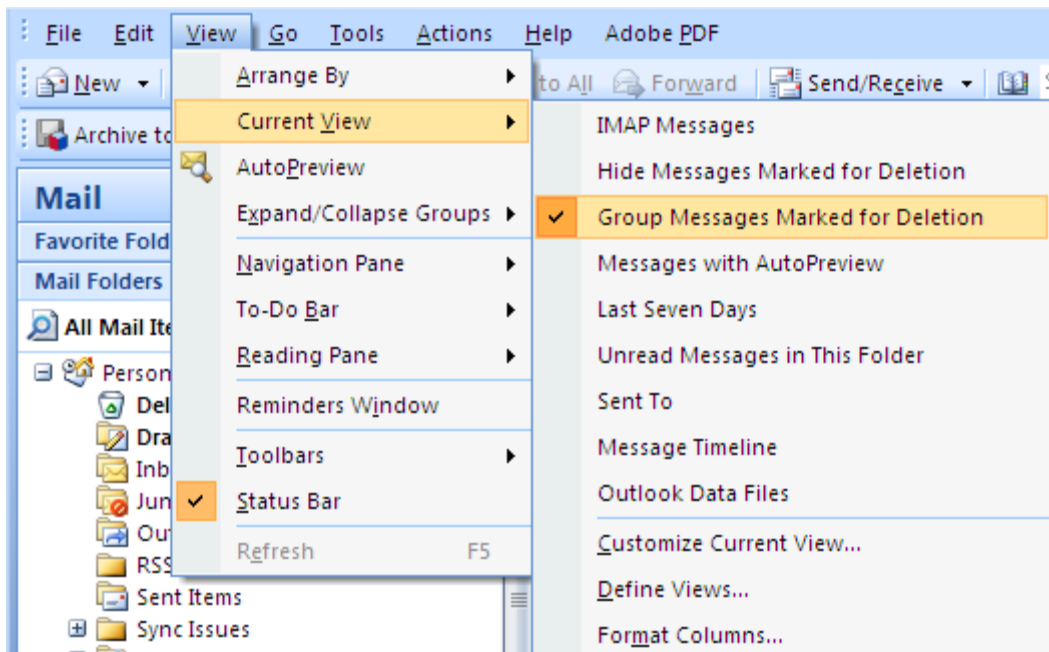
- Click **Close** on the *Account Settings* window.
- Restart Outlook, if prompted to do so.

Working with deleted items and an IMAP account

When using IMAP for mail folder synchronization, items are first marked for deletion (by default, Outlook puts a line through the item) and then purged by clicking on *Edit->Purge*.

It's often desirable to hide deleted items from view for IMAP accounts. When grouping, deleted items are listed below all other mail items in a folder. The view setting is unique to each folder.

- To hide or group the deleted items, Click on the IMAP folder you wish to change (such as Inbox) in the Mail Folder area.
- Click on the menu item View, then on Current View. You'll see many options... the most useful in this context are Hide Messages Marked for Deletion and Group Messages Marked for Deletion.



WebSync Outlook Plug-in

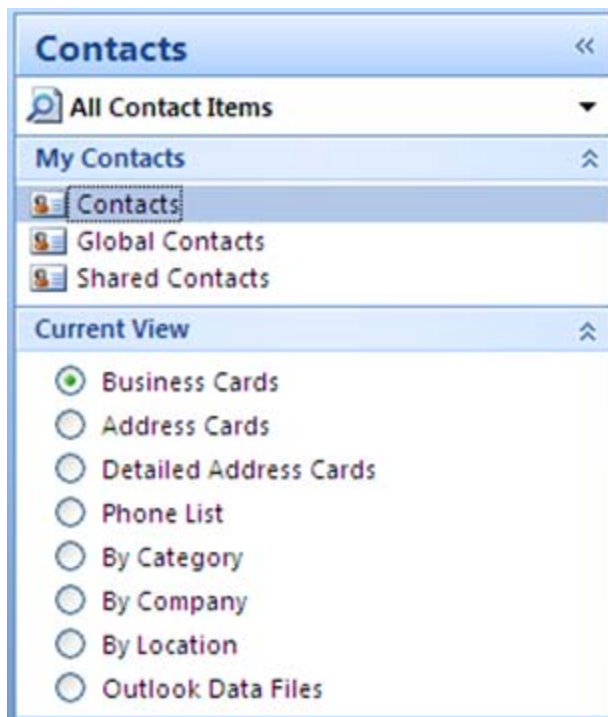
If you intend to use both Outlook and Webmail or need to use a shared address book within your organization, you may download and install the WebSync Outlook utility, which will synchronize your contact, calendar and tasks between Outlook and WS Webmail.

More information and instructions on WebSync installation are available at <http://wsalt1.wspbx.com/parse.php?file=html/english/help/sync.html>.

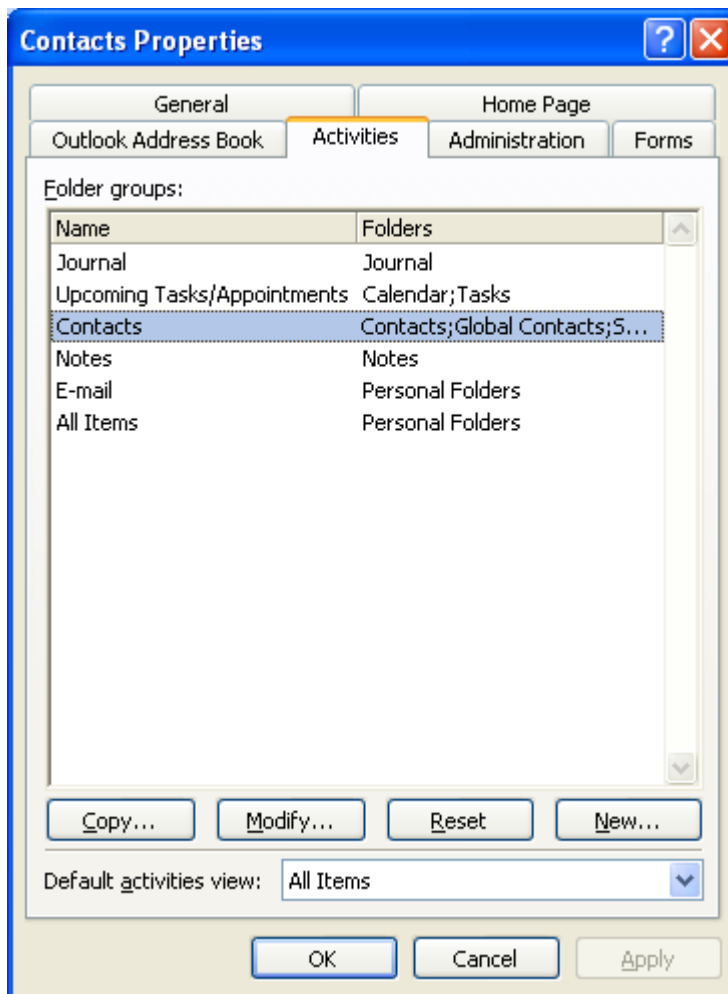
Global and Shared Contacts

It may be desirable to browse and use global and shared contacts synchronized using the WebSync plug-in. Often Outlook may not list these additional folders by default. Follow the steps below so that the “Navigation Pane” lists these folders and so that the contact lists will be used when Outlook searches for unknown names and addresses.

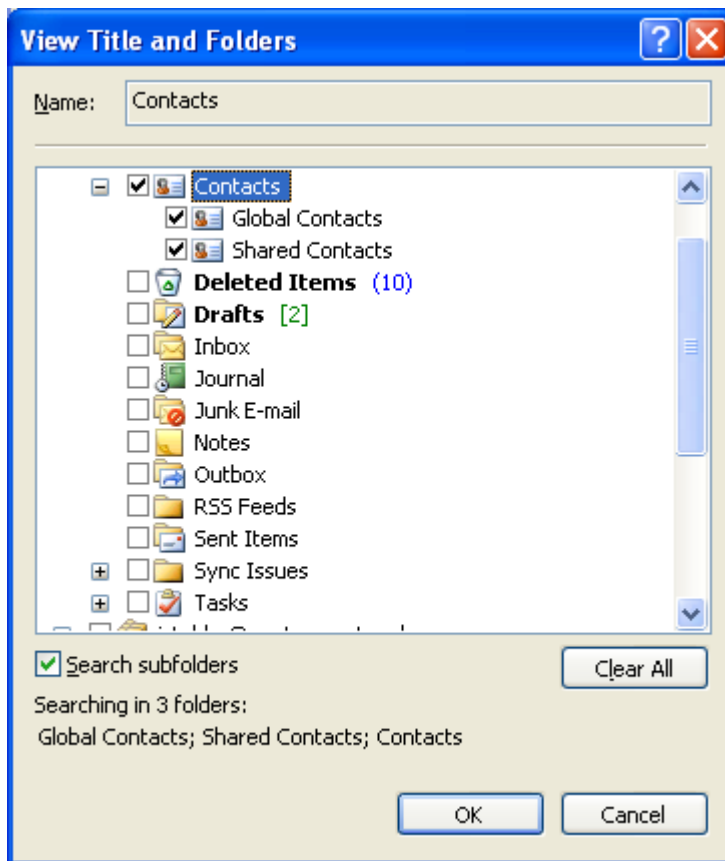
- Click on **Contacts** in the *Outlook Navigation Pane*. You should then see a list of contacts under the **Contacts** header.



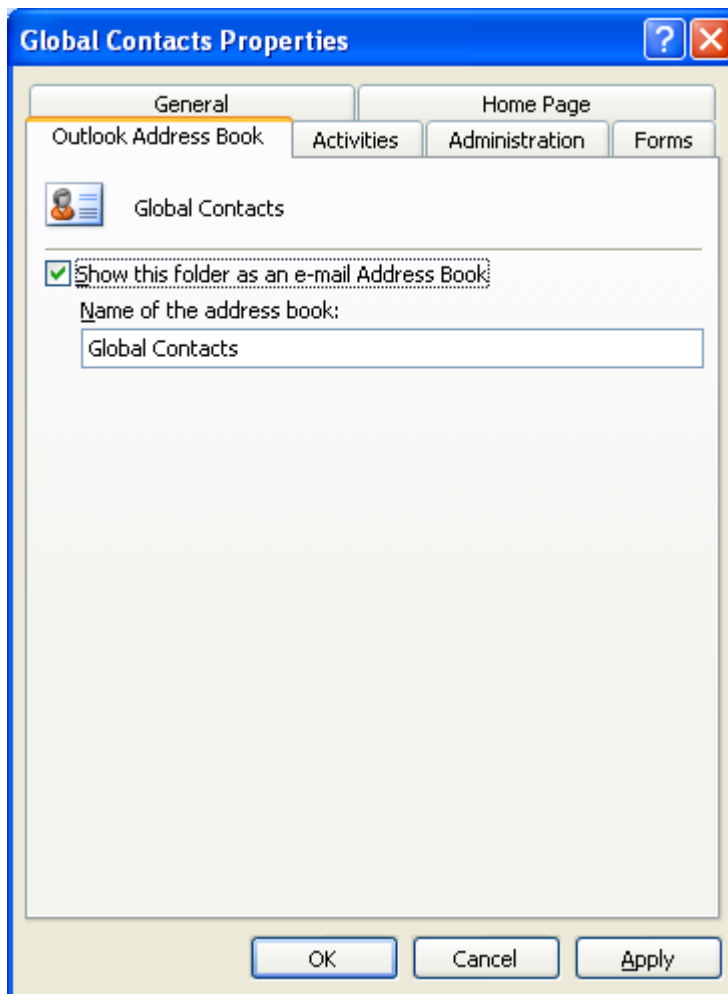
- Right click on the **Contacts** item and choose Properties. Click on the *Activites* tab.



- Select the **Contacts** folder group and click on the **Modify...** button. Be sure that *Contacts*, *Global Contacts* and *Shared Contacts* are all selected and click the **OK** button. Click **OK** again to close *Contacts Properties*.



- On the *Navigation Pane*, right click on **Global Contacts**, choose **Properties** and click on *Outlook Address Book* tab.



- Make sure the checkbox is selected for **Show this folder as an e-mail Address Book**. Click **OK**.
- Follow the same steps for Shared Contacts.