



Preparing to Migrate to Outlook

AS WE PREPARE TO MIGRATE TO OUTLOOK THERE ARE A FEW TASKS WE NEED TO PERFORM TO ENSURE A SMOOTH TRANSITION FOR OURSELVES. PLEASE READ BELOW TO UNDERSTAND WHAT YOU NEED TO DO TO PREPARE FOR YOUR MIGRATION.

WHAT DO I NEED TO DO **BEFORE** I RECEIVE OUTLOOK?

- 1) **Get organised:** Do you have folders that you aren't using, old email that can be deleted, or outdated rules that no longer apply? Conduct a review of your Lotus Notes mailbox and folders.
- 2) **Filters (called mail rules in O365) created in Lotus Notes** will not be automatically migrated to Outlook. You may want to note any email filters or rules you are currently using so that you can re-create these in Outlook .
- 3) **Notes:** Any notes that you have made in Lotus Notes will not copy over to Outlook. If you would like to keep these you will need to copy and paste into a Word document.
- 4) **Book time in your Calendar:** Allow yourself time the morning after your migration to log into Outlook to confirm your email, calendar and contacts have successfully migrated. Read [Training Materials are available here.](#) and become familiar with Outlook.
- 5) **Set end dates on recurring meetings:** Recurring meetings without end dates will not migrate. Ensure these meetings migrate by selecting an end date.
- 6) **Stationery:** If you have saved email templates in stationery these will not migrate over into Outlook. You will need to copy any templates into a word document and then add into outlook after migration.

WHAT DO I NEED TO DO **AFTER** I HAVE OUTLOOK?

- 1) Check your re-occurring meetings are in your calendar.
- 2) Create your email signature in Outlook.
- 3) Set up any email rules you would like to have.
- 4) Set up any stationery templates you require.

TRAINING & SUPPORT

All training materials, videos, quick guides and detailed guides [are available here.](#)

If you have a Technical query please raise an IT Incident form or contact the IT Service desk on: 023 8025 6000