# Outlook Pre-Migration Tasks

The Office 365 Shared Tenant transition will automatically migrate most of your Outlook items including mail, folders, global address book and calendar items. However, some settings and data will not transfer. We encourage you to review the following list and follow the steps provided to manually backup and save the Outlook settings that you use. Items that will not automatically transfer over include:

- Distribution Lists
- Contacts
- Mailbox Rules
- Signature
- Junk Email Lists
- Profile photo
- Work hours, Busy/free hours
- Color Categories
- Delegation Access

The instructions below detail how to back-up each of the settings listed.
- For additional information, see the ***How-To-Guides***
    - [Anoka Ramsey CC](#)
    - [Anoka Technical College](#)

## DISTRIBUTION LIST
### How to save contact group/distribution lists (applicable to PC and MAC):
1. Select the distribution/contact list(s) you want to save
2. Select **Forward Contact**
3. Email to yourself, as you'll need to import them after the transition

## CONTACTS
### How to export contacts:

**Using Office on your PC:**
1. Click on **File** > **Open & Export** > **Import/Export**
2. Click on **Export to a file** > **Next**
3. Click on **Comma Separated Values** > **Next**
4. Under the account you want to export from, click on **Contacts** > **Next**
5. Click on **Browse**
6. Save the file on your PC or on your OneDrive
7. Select **Finish**

**Using Outlook on a Mac:**
1. Click **File**
2. Click on **Export**
3. Make sure that Contacts is checked
4. Click **Continue**

**Using Office 365 Online:**
- [https://support.office.com/en-gb/article/export-contacts-from-outlook-com-to-a-csv-file-578cca22-3550-4c73-b3f0-9978cfeac83f](https://support.office.com/en-gb/article/export-contacts-from-outlook-com-to-a-csv-file-578cca22-3550-4c73-b3f0-9978cfeac83f)

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## MAILBOX RULES
**How to backup mailbox rules (PC only, not available for Mac):**

1. Click **File** > **Manage Rules & Alerts**
2. Click on **Options**
3. Click on **Export Rules**
4. Save on either your PC or on OneDrive

## SIGNATURES
**How to backup signature:**

**Using Office on your PC:**
1. Click on **File** > **Options**
2. Outlook Options will open
3. Click on **Mail** > **Signatures**
4. Highlight signatures in the text box top and copy (Ctrl + C)
5. Open new Word Document paste (Ctrl + V) them into a Word Document
6. Save the Word Document on your PC or in your OneDrive

**Using Office on your MAC:**
1. Click on Outlook from upper left corner
2. Outlook Preferences will open
3. Click on **Signatures**
4. Highlight signatures in the Signature Preview box and copy
5. Paste them into a Word Document
6. Save the Word Document on your Mac or in your OneDrive

## JUNK EMAIL LISTS
**How to export your Outlook Junk Email Filter lists as a text (.txt) file (PC only):**

1. Open an email
2. Click the **Message** tab
3. In the Delete group, click **Junk**, and then click **Junk Email Options**
4. For each of these tabs - Safe Senders, Safe Recipients, or Blocked Senders - click **Export to File**
5. Select the save name/location of the file
6. Click **Save**

## PROFILE PHOTO
**How to save your current profile photo (applicable to PC and MAC):**

1. Login to your Office 365 profile
   a. Use the following link:
      https://outlook.office.com/owa/?path=/options/myaccount/action/photo
2. Right click your photo > **Save As**
3. Save either locally or on OneDrive

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## WORK HOURS, BUSY/FREE HOURS

**Where the "Work Time" and "Free/Busy Options" are located (PC):**

1. Open them at **File** > **Options**
2. The "Work Time" section in the Calendar menu. It has its own subsection called "Work time"
3. "Free/Busy Hours" is located under Calendar Options, select the "Free/Busy Hours" option
4. Take a screenshot of the settings for both, as they'll need to be recreated after the migration

**Where the "Work Time" and "Free/Busy Options" are located (Mac):**

1. Click on **Outlook** > **Preferences** on the menu bar
2. Click on **Calendar**
3. Take a screenshot
4. For screenshot help, please see [here](here)

## COLOR CATEGORIES

**Color Categories (PC):**

1. Click on **Categorize**
2. Click on All **Categories**
3. Take a screenshot, as they'll need to be recreated after the migration

**Color Categories (Mac):**

1. Click on **Outlook** > **Preferences** on the menu bar
2. Click on **Categories**
3. Hold (Shift+cmd+4+Space), then click on the Categories window in to take a screenshot

## DELEGATION ACCESS

**How to save your Delegation Access List (PC Only):**

1. Go to **File**
2. Make sure the account you want to delegate access with is selected under "Account Information"
3. Click **Account Settings** > **Delegate Access**
4. Click on the account you want to back up > **Permissions**
5. Take a screenshot of the permissions, as they'll need to be recreated after the migration.

## For Snipping tool help:

*If you need help using the **Snipping Tool** to make a screenshot, go here:*
*https://support.microsoft.com/en-us/help/13776/windows-use-snipping-tool-to-capture-screenshots*