Office 365 Pre-Migration Checklist

This checklist will help students, faculty, and staff plan for the email holiday starting **Friday, July 25th at 12:01am**. At that time, pantherLINK will be unavailable as account data begins migrating to Office 365. Completing these tasks will help you manage without UWM email and calendar for a couple days, take care of large emails and prepare for the launch of Office 365 on Monday, July 28th at 6:00am.

☐ **Print your pantherLINK calendar for Friday, July 25th**
  » UWM email and calendar will be unavailable during the July 25th – July 28th holiday
  » Display your pantherLINK calendar in **Day** or **List** view and click the **Print Calendar** button

☐ **Contact people you collaborate with and provide alternate contact info**
  » UWM email and calendar will be unavailable during the July 25th – July 28th holiday
  » Reach out to your students and colleagues to give them an alternate email

☐ **Bookmark the Office 365 login page in your Internet browsers**
  » Starting Monday, July 28th go to [outlook.office365.com](http://outlook.office365.com) to log in to Office 365
  » Once live, you will log in with your @uwm.edu email and ePanther password

☐ **Find and manage email messages larger than 25MB in pantherLINK**
  » Emails larger than 25MB (including attachments) will not migrate to Office 365
  » Search “bigger:25mb”, download attachments you need, and remove all large attachments

☐ **Clean up your emails to expedite your account’s migration to Office 365**
  » Organize emails into folders and delete unneeded emails and attachments
  » Empty your *Trash* and *Junk* folders when you have finished organizing

☐ **Note your pantherLINK preferences, email filters, and signatures**
  » Preferences, email filters and signatures will not migrate to Office 365
  » Jot down these settings so you can re-create them in Office 365

☐ **Note your shared calendars and email folders in pantherLINK**
  » Calendars and folders will migrate, but sharing permissions will not
  » Go to *Preferences → Sharing* in pantherLINK and take note of shared items

☐ **Take some time to learn about Office 365 and Microsoft Outlook**
  » Register for Office 365 Email and Calendar courses from [Learning TECHniques](http://learning.tec.uwm.edu)
  » Go to [uwm.edu/o365](http://uwm.edu/o365) for how-to’s, known issues and a whole lot more
  » Watch the lynda.com Office 365 and Outlook [video playlist](http://www.youtube.com/playlist?list=PLP772B15DBA4C47C7)
Office 365 Post-Migration Checklist

This checklist will help students, faculty, and staff plan for the launch of Office 365 on **Monday, July 28th at 6:00am**. At that time, Office 365 will be used to receive incoming emails and schedule all meetings. Completing these tasks will help you set up your Office 365 account and preferences, verify the migration of email/calendar data, configure mobile devices and desktop clients, and learn more about Office 365.

- **Log in to Office 365 and set your language and time zone as needed**
  - Go to [outlook.office365.com](http://outlook.office365.com) and log in with your UWM email address/ePanther password
  - To set your language and time zone, click the gear icon, select **Options → settings → regional**

- **Confirm your most recent emails and calendar appointments have migrated**
  - Your last 14 days of email and all meetings and contacts should be in your Office 365 account
  - Emails older than 14 days can be viewed in [pantherLINK](http://pantherlink) before they migrate to the new system

- **Re-create your preferences, email filters and signatures**
  - Use pre-migration notes or access [pantherLINK](http://pantherlink) to re-create preferences, filters and signatures
  - Go to [uwm.edu/o365](http://uwm.edu/o365) for how-to’s on re-creating these settings and more

- **Re-share calendars and email folders with your students and colleagues**
  - Re-share calendars and email folders you took note of pre-migration
  - Log into [Office 365](http://office365), click the **Calendar** app, right-click your calendar, and share as needed

- **Configure your mobile devices for Office 365**
  - To access Office 365 on the go, remember to set it up on your mobile devices
  - You’ll need your UWM email address, ePanther password and setup [instructions](http://instructions)

- **Configure your desktop email client for Office 365**
  - Outlook 2010/2011/2013 offers the most Office 365 functionality
  - You’ll need your UWM email address, ePanther password and setup [instructions](http://instructions)

- **Upload a photo for your Office 365 avatar**
  - Take a picture of yourself and remember to smile :)
  - Log into [Office 365](http://office365), click your name in the top-right, click **change**, then browse and upload

- **Take some time to learn about Office 365 and Microsoft Outlook**
  - Register for Office 365 Email and Calendar courses from [Learning TECHniques](http://learningtechniques)
  - Go to [uwm.edu/o365](http://uwm.edu/o365) for how-to’s, known issues and a whole lot more
  - Watch the lynda.com Office 365 and Outlook [video playlist](http://videoplaylist)