

MIGRATING GROUPWISE EMAIL USING OUTLOOK 2010/07

The following guide provides instructions for migrating live email, contact and calendar information from GroupWise using the Outlook Mail Client.

Email Migration Using Outlook 2007 or 2010

This document outlines the process of using Microsoft Outlook to migrate GroupWise email to an Exchange email account. This method only supports migration of live mail and not archives. A separate document describes the best practice model for using Kernel Migrator tool to migrate archives.

Pre-Migration Requirements:

1. User must have TAMU NETID and password updated and known.
2. Microsoft Outlook 2007 or 2010 must be installed. Reboot the computer after installing Outlook and before configuring the email accounts.
3. GroupWise caching must be enabled and functional. (See related Document.)

First Steps with Customer:

1. Work with employee to change gateway.tamu.edu re-direction setup
 - a. Redirect for their @tamu.edu address should be directed to:
Firstname.lastname@agnet.tamu.edu
2. Interview employee on what items they use (Calendar, Contacts, etc.) and agree as to what will be migrated.
3. If the customer has any other applications open please ask them to close the application and save any documents they may have open.
4. Once these items are completed the customer can go about their work activities and is not required until the final steps.

Verify GroupWise Status and Prepare Outlook Client:

1. Open GroupWise and verify that it is set to Caching Mode.
2. Go to Tools>Rule and setup up a DELEGATION rule to forward their email to their new exchange account (firstname.lastname@agnet.tamu.edu).
3. Test the forwarding rule by emailing their GroupWise account (from within GroupWise) and verify the email has been sent to their outlook account. (Use <http://agnet.tamu.edu> interface to view their exchange account.)
 - a. If the email does not forward correctly for some other reason, please contact the FirstCall Help Desk to escalate a fix. B/CS: 985.5737; Toll Free: 866.996.2056

4. Open Outlook. This should display all the folders, contacts and calendar entries within the users GroupWise Account.

Exceptions:

- a.) If the folders within the CAB directory do not display within Outlook:
 - Click on Account Settings within Outlook
 - Click on “Data Files”
 - Click on “Change Settings”
 - Click on Advanced Tab and make sure “Use Cached GroupWise Mode” is checked.
- b.) Shared folders from another mailbox will not be seen in outlook. This is okay as these should not be migrated.
- c.) If the user has multiple address books you must select each address book as the “default” in GroupWise and then re-open outlook to see that particular address book.
 - Close Outlook.
 - In GroupWise, right click on Contacts and select Properties.
 - Change the address book in the drop-down menu on the default tab and click OK.
 - Reopen Outlook to move the contacts from this address book.
- d.) If Outlook says that it cannot open the data file and then closes it is most likely there are two Mail Profiles in the system. Some systems have two Groupwise Mail profiles. One is an orphan and is not used the other is used by Groupwise. To remediate perform the following:
 - Close Groupwise
 - Go to Control Panel > Mail (or Mail 32)
 - Open up the Profiles Tab
 - You will see two profiles. Their names are of no use and you are not going to be able to tell which profile is the real profile.
 - Next, Open each profile and expect it’s configuration details. Pay particular interest to the Data File settings as one of the profiles may not have one or may be missing other details the other profile has.
 - You will need to pick the profile with missing components or that don’t seem to be the real used profile and delete it.
 - After doing so immediately check to see if Groupwise still loads and is working properly; if so then retry to see if Outlook opens. If not contact the FirstCall help desk for escalated assistance.

5. Once it is verified that Outlook can see all the GroupWise items. The next step is to add the new exchange account within Outlook.

6. Click on “Account Settings” and Add Account.
 - a. Email: firstname.lastname@agnet.tamu.edu
 - b. Password: default is “Passw0rd”
 - c. The outlook client will then proceed to download account settings and configure the local account files. This process could take up to 1 minute.

7. After completed restart Outlook. Upon restart Outlook will need a moment to complete the creation of local OST files for the new exchange account. Please let it complete the process.

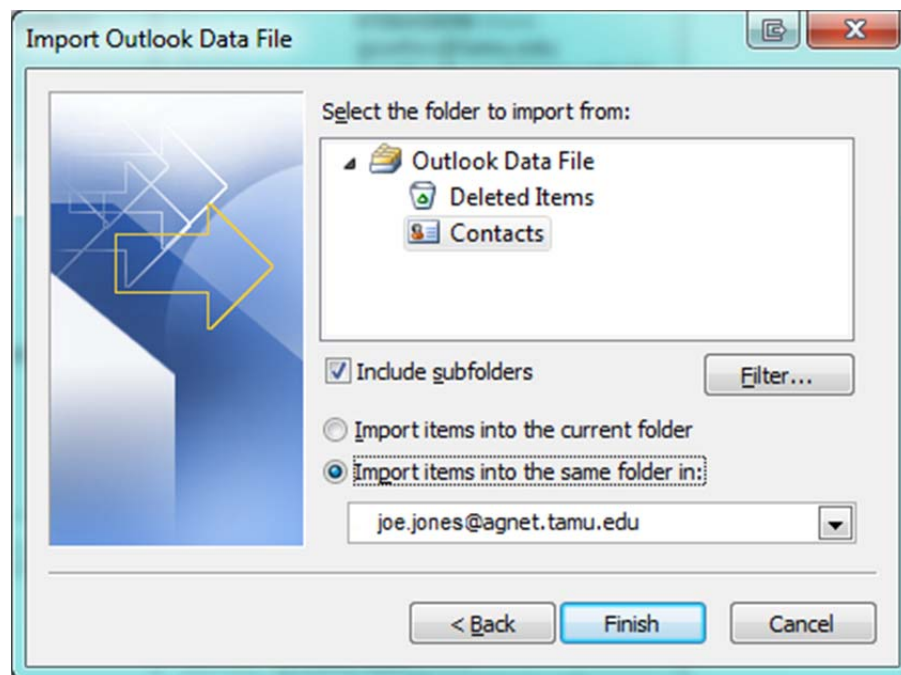
Migrating Mail Between GroupWise and Exchange Account:

1. **GroupWise must be open in Caching Mode!**
2. **Within Outlook switch it to OFFLINE MODE!**
 - 2010:** Click on Send/Receive Tab and click the Offline Button.
 - 2007:** In the lower right corner of Outlook click on the “connected to Microsoft Exchange” link and select “Work Offline”
3. Within Outlook select all emails within the GW INBOX and copy/paste them into the INBOX of the Exchange Account.
4. Repeat step 3 for the SENT and DRAFTS folders if required.
5. For Personal folders (i.e. CAB Directory) the recommended process is to first create a new folder within the Exchange account called CAB.
6. Depending upon the number of folders the user has and how they are structured under the CAB folder it is recommended to select one or a few folders at a time for a copy and paste process:
 - a. Right-Click on a folder and select COPY.
 - b. Move up to the new CAB folder in the Exchange Account and Right-Click and Paste the Folder.
 - c. Depending on the number of emails in the folder this may take a few seconds to a few minutes. Let the process complete before performing this action on any other folders.
 - d. Repeat this process until all folders are copied to the Exchange Account.
 - e. **VERIFY THAT ALL FOLDERS & SUBFOLDERS HAVE BEEN MOVED!**

Migrating Calendar and Contact Items:

1. Go to the Contacts Tab within Outlook.
2. Select the GroupWise Contacts folder (it is usually the 2nd one listed and is the only one with contacts in it.)
3. In Outlook 2010, do the following:
 - a. Click on **File**
 - b. Click on **Open**
 - c. Click on **Import** in the right panel
 - d. Select “**Export to a File**”
 - e. Select “**Outlook Data File (.pst)**”
 - f. On the next window select the **CONTACTS** folder under the GroupWise Account.
 - g. Click on Browse and create a new folder under My Documents called “GW-TEMP”
 - h. Name the file “GW-CONTACTS.PST”
 - i. Leave “Replace Duplicates with Items Imported Checked.”
 - j. Click the **FINISH** button.
 - k. Do not specify a password.

- I. It should take less than 1 minute to migrate the contacts to the PST file
4. Repeat Steps 1 through 3 for the CALENDAR folder. Simply change all references of CONTACTS to CALENDAR.
5. Once PST files have been created for the CALENDAR and CONTACTS we need to load them into the Exchange account. Follow these steps:
 - a. Click on **File**
 - b. Click on **Open**
 - c. Click on **Import** in the right panel.
 - d. Select "**Import from another program or file**"
 - e. Select "**Outlook Data File (.pst)**"
 - f. Browse to the My Documents / GW-TEMP Directory created earlier
 - g. Pick the GW-CONTACTS.PST file
 - h. On the next panel make sure that the CONTACTS folder is selected, then click the "Import items into the same folder in:" option.



- i. Then click **FINISH**.
- j. This should add the contact listings from the GroupWise Contacts folder to the Exchange Contacts folder. If the wrong selections were made on the above panel it will create a new "CONTACTS" folder within the Exchange account.

If that happens, **DO NOT** leave the account in this mode! Simply Delete the CONTACTS folder that was created and perform steps A through I again. Leaving the customer with two CONTACTS folders in their new Exchange account creates a variety of issues and confusion.

6. **Repeat Steps 5 (a through i) for the Calendar by simply changing out all references for Contacts to that of Calendar. The process is identical.**

Finalizing the Live Email, Contacts and Calendar Migration:

At this time all the email, contacts and calendar entries for the live GroupWise mailbox should be copied to the local exchange data files on the workstation. The next step is to allow Outlook to synchronize this information with the exchange server.

Follow these steps:

1. Leave GroupWise up in Caching Mode.
2. In Outlook go to Send/Receive Tab and toggle the Work Offline mode OFF so that Outlook will go online.
3. You will immediately notice the Outlook client begin to synchronize data back to the server.
4. This process can take anywhere from a few minutes to 20 to 25 minutes depending on location and amount of data.
5. While this process is taking place do not close or perform any other activities with GroupWise or Outlook.
6. IF Outlook appears to be non-responsive. Open the Windows Task manager and go the services tab and look for the Outlook Service. If the Memory or CPU numbers are changing then Outlook is still operating. Simply continue to monitor. If after several minutes you do not see Outlook is using memory or CPU then it most likely frozen or locked.

Remediation Options are:

- a.) Close Outlook or Kill the Outlook process.
- b.) Wait a moment for the Outlook application to fully close out.
- c.) Restart Outlook.
- d.) If Outlook comes up in a frozen state again you will need to start in Safe Mode.
- e.) In Windows Explorer go to
C:\Program Files (x86)\Microsoft Office\Office14
- f.) Select the Path and copy as Text

Removing GroupWise and the Mail Profile and Initialing Outlook:

The next phase is to remove GroupWise from the system. Before proceeding make sure that all data has been synchronized to the Exchange server as described above and that any archives have been migrated and tested. This is important as the next process will remove the Mail Profile and associated Outlook data files from the system. The purpose of this procedure is to completely remove all remnants of GroupWise to allow for a stable Outlook operating environment.

1. GroupWise and Outlook should both be closed.
2. Go to the Control Panel > Add Remove Programs (or equivalent per OS version)
3. Find Novell GroupWise and select Uninstall.
4. Let the uninstall procedure complete.
5. Start Outlook. It should prompt you for a mail profile. Enter "Outlook 2010"

Note: If you are not prompted for a Mail profile name go cancel out of Outlook and perform the following:

- a.) Go to the Control Panel
- b.) Select the Mail32 Icon
- c.) Select the Mail Profile Tab
- d.) Delete the mail profile listed in the window
- e.) Go back to Step 5 above and restart outlook.

6. The next screen within Outlook will prompt for the user email address and password:

Username: firstname.lastname@agnet.tamu.edu

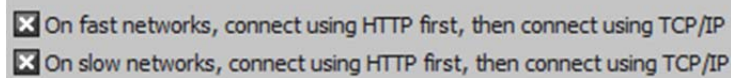
Password: Passw0rd

7. Allow Outlook time to connect to the exchange server and re-download server settings.
8. It will prompt you several times for the password during this process and during the account initialization. Do not select REMEMBER password.
9. Outlook may require a restart.
10. Once restarted it will begin to download information to the local outlook OST files from the server. This may take several minutes depending on the amount of email contacts and calendar items the user had.
11. Monitor the synchronization and validate that it is continuing and that all email, contacts and calendar items have been downloaded.
12. Use the OWA interface at <http://agnet.tamu.edu> to verify synchronization.
13. **Next you need to make sure the Microsoft Exchange PROXY Settings are set correctly and that "On Fast Networks, connect using HTTP first, and then connect using TCP/IP" is checked. This will drastically increase the connection and download speed of the outlook client and is required for all Outlook installs**

located off of the TAMU Main Campus Network and prevent outlook “freezing” that may be experienced by the end user.

To activate do the following: (this can be performed while the Client is downloading email)

- a. Go to **FILE > Account Settings > Account Settings**
- b. Select the **CHANGE** option under the EMAIL tab
- c. On the next window click the **MORE SETTINGS** button
- d. On the Next window click on the **CONNECTION** tab
- e. On the Connection window click on **EXCHANGE PROXY SETTINGS**
- f. On the next screen make sure the “On Fast Networks..” option IS checked.



Password Reset and Orientation:

After completing the migration of live email, contacts, and calendar items and the removal of GroupWise the next process is to quickly orient the user on how to load Outlook, access the web interface and change their password. The following steps are recommended.

1. The first task is to have the user reset their password. All password resets both now and in the future will be done through the Exchange Web interface.
2. Show the user what the web address is: <http://agnet.tamu.edu> (ask that they create a bookmark or write it down for easy referral or use at home. Also you can tell them that the web address is located on the First-Call.tamu.edu helpdesk site and is referenced in several email help pages.
3. Once the web interface is up login the user using the default password and username. Inform the user that their username is “firstname.lastname”
4. Once loaded click on the OPTIONS link in the upper right corner. Then Select the “Change Password” option in the drop down.
5. Enter the default password “Passw0rd” in the current password field
6. Inform the user of the password rules and have them create a password that meets the rules before trying to type it in. Password rules are as follows:
 - Must be at least 8 characters
 - Does not contain your account or full name
 - Contains at least three of the following character groups:
 - o English uppercase characters (A through Z)
 - o English lowercase characters (a through z)
 - o Numerals (0 through 9)

- Non-alphabetic characters (such as !, \$, #, %)
7. Have the user enter in their new password twice. If it meets the standards it will be accepted after they click the SAVE link in the lower right corner.
 8. Have the user log back into the OWA interface and test their password.
 9. Direct the user to the mail view within the OWA interface and provide a brief introduction to the various parts of the interface. Specifically cover how to send and read an email.
 10. Inform the user that this is the interface they should use when not on their work system to access email. This interface is accessible from anywhere there is internet access.

After completing the walk through with the Outlook Web interface close the user's browser and load Outlook.

1. When loading, Outlook should prompt for a password. Have the user enter their new password.
2. Outlook should complete startup and present the mail view.
3. Provide the user with a brief introduction of the Outlook interface showing how to access mail, calendar and contacts.
4. Once complete close Outlook and have the user open and login to verify they are successful.
5. Provide the user with the FirstCall Help Desk URL and show them the link to the "Migration" section. And briefly point to the various documents and help guides on how to use Outlook.

Phone Email Migration:

If the user has an email capable phone refer to the appropriate help guides to setup the phone to access the users Exchange account. The user will be required to enter in their password when required.

For users using Blackberry devices please send a request to first-call@tamu.edu to have an activation email sent to the user's email account with activation instructions. They can also contact the help desk for support to finalize the setup if need be. If they have anything on the device that they do not want to lose, they must back it up before activating on the new server.

In general the following information will work when prompted on various ActiveSync Exchange capable devices such as iPhones, Droids, or Windows Mobile.

Username: firstname.lastname

Email Address: firstname.lastname@agnet.tamu.edu
Server: owa.agnet.tamu.edu
Domain: agnet.tamu.edu
Domain\username: agnet.tamu.edu\firstname.lastname
Domain\Email: agnet.tamu.edu\firstmain.lastname@agnet.tamu.edu