



## Office 365 Outlook Migration Departmental Preparation Report

**Instructions:** This template is designed to assist departments in gathering information in preparation for the upgrade to Office 365 Outlook (OWA 2013). The first section catalogs data points that will aid the onsite team in reconciling resources, etc. The second section catalogs pertinent data for the migration team to use during migration.

Please complete and return this form during the first week of your migration. The project team will contact you in the event that the information has not been provided, or if follow up is required.

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**Project Name: Office 365 Implementation – Upgrade to Outlook (OWA 2013)**

**Department:**

**Migration Group Number:**

**Date of Migration:**

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### Prepared By

Document Owner(s)	Project/Organization Role
	Onsite Team Contact
	Onsite Team Contact
	Other _____

### Catalog for Onsite Team

Pre Migration Action Items	Additional Instruction	Initial
Discard of any unneeded public folders	Onsite team to complete	
Document permissions to resource public folders (i.e. calendars & projectors)	Document internally	
Document permissions to shared mailboxes	Document internally	
Delete inactive mailboxes	Onsite team to complete	
Identify shared and group accounts	Document internally	

List of all active mailboxes that pertain to mail enabled applications or operational functions (i.e. ESB, Oracle notifications)	Document internally & return report to O365test	
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<b>Recommended Post Migration Action Items</b>	<b>Additional Instructions</b>
Verify shared and group accounts migrated	Confirm with O365test
Verify room and resource accounts transferred	Confirm with O365test
Re-share calendars and folders	Onsite team to complete
Aid in mobile set up (refer blackberry users to help desk)	Onsite team to assist
Check with key staff to ensure they are functional	Onsite team to assist
Verify data transferred (email and calendar for all accounts)	Onsite team to assist
Reestablish rules in Office 365 options if settings did not transfer	Onsite team to complete
Remove old account settings from Outlook (i.e. old profiles)	Onsite team to assist
Ensure that time zones are set correctly in Office 365	Onsite team to assist

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