Lotus Notes to MS O365 Checklist

☐ **1. Make a note of rules or filters that you use to manage your email**
Filters (called rules in Office 365) created in Lotus Notes will not be migrated; therefore, you may want to take the time to look over the rules/filters that you are currently using and make a note of any that you will want to recreate in Office 365. If you use filters to manage your email by automatically moving messages to folders, you may want to re-create similar rules after your account is moved.

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☐ **2. Make a note of any calendars you are subscribed to**
If you are subscribed to other calendars, you may find that it's helpful to make a list of the calendars you are currently subscribed to. This will make it easier to re-subscribe to those calendars in the new system.

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☐ **3. Make a note of who your calendar is shared with**
If your calendar is shared, you may find that it's helpful to make a note of who your calendar is shared with and the level of permissions they have been granted. This will make it easier to re-share your calendar in O365.

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☐ **4. Make a note of any team mailboxes you are a member of**
If you are a member of a team/shared mailbox, you may find that it's helpful to make a list of the team/shared mailboxes. This will make it easier to add the team (or group) in Outlook.

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☐ **5. Complete a contact sync in Lotus Notes**
Personal contacts are stored locally on your computer. To ensure your personal contacts migrate to your O365 account, enable contact sync between your local and server contacts by following the steps under **How to Enable Contact Sync in Lotus Notes** or **Schedule Contacts Sync in Lotus Notes**. Once complete, please **do not** add any new contacts in your Lotus Notes account.

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☐ **6. Learn how to use Office 365**
A variety of resources are available to help you learn to use Office 365. An overview of the resources available can be found at: https://support.office.com/en-us/office-training-center