How to move your Email Data to Pushex from another Exchange server using Outlook 2010

The requirement to move all your existing Email data over from your current Exchange server to a new one can be the biggest obstacle to deciding to move to a Hosted Exchange system.
There's no automatic way to do this and so the process is:-

Export email data from your old server mailbox to a PST file on your PC, then
Import the PST file into your mailbox on the new server.

This process can take between 20 minutes and several days depending on the size of your existing mailbox. A couple of hours would be normal for a 1 GB mailbox.

In Outlook, you can't just change the server-name, user-name and password and then carry on as before, you need to create a new profile for the new server. Even after transferring over your email data, this new profile may be missing other data and settings you had in the old profile, such as:-

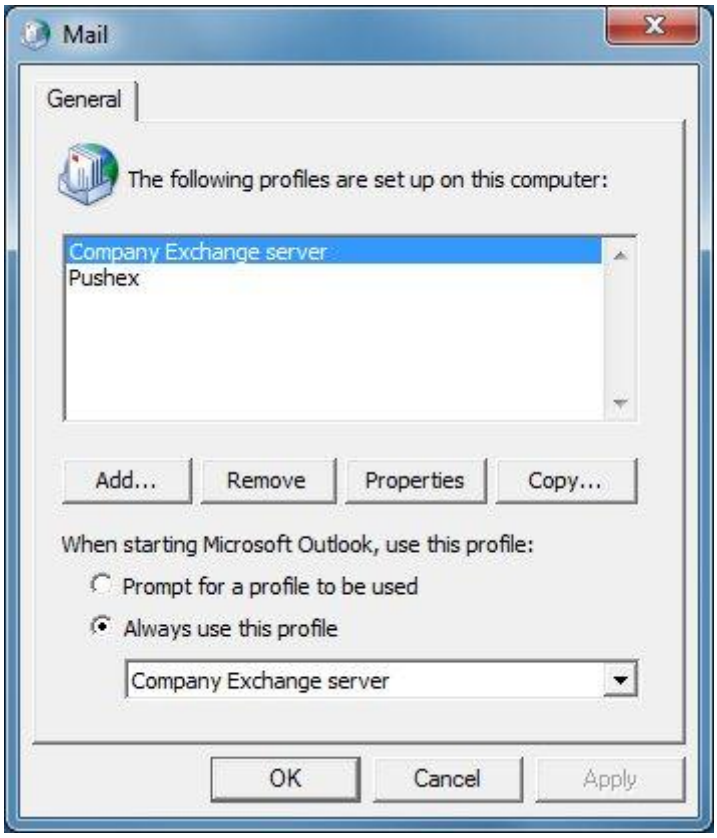
Archive Folders, Inbox Rules, Signatures, Extra accounts, Nicknames (email address auto-suggestions) and Public Folders.

This guide takes you through transferring your email data and other additional data and settings.

Prerequisites:-

1 - Before you start you need to have Outlook 2010 installed on your PC with 2 profiles set-up for the 2 Exchange servers that you can switch between.
We've prepared another guide you can download, from our support page, that takes you through setting up an Outlook profile to connect to our Exchange server.
To change between profiles, close Outlook and go to:-
Start – Control Panel – Mail – Show Profiles…

then click on the arrowhead at the right of the box under **Always use this profile** and select the profile you want to use next time Outlook starts .
In this example you are moving ***from*** Company Exchange Server ***to*** Pushex.



2 - New emails need to have been diverted to your new mailbox and, once you start the transfer process, you shouldn't make changes to the old data, such as editing a calendar entry or sending an email, as these changes will not be copied across.

1 – Exporting your old data to a PST file

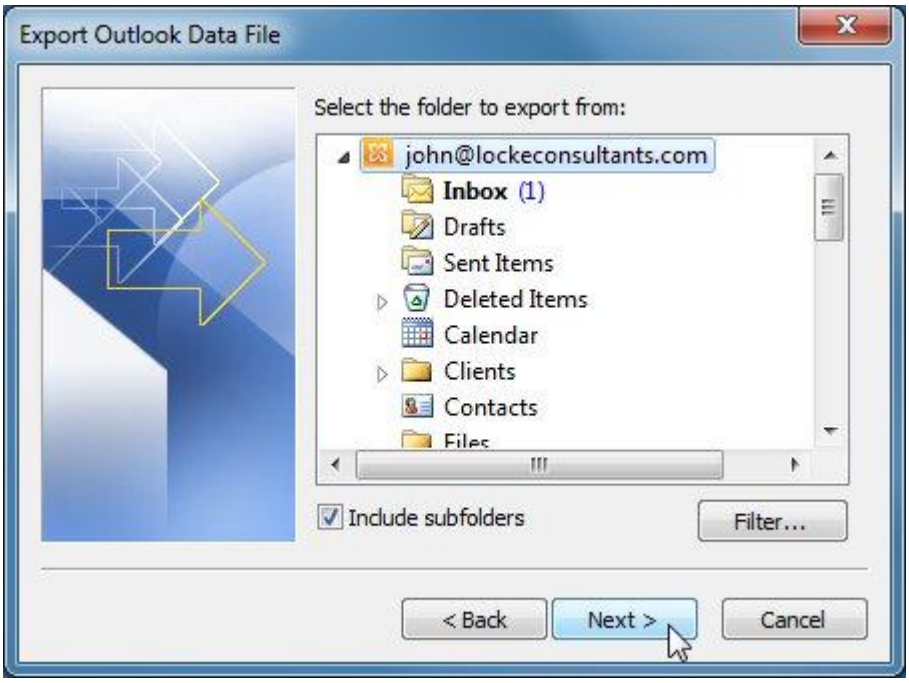
Select the **Company Exchange Server** profile and start Outlook.

Select **Send/Receive All Folders** on Outlook's Send/Receive tab

This will ensure that the local Outlook cache on the PC is synchronised with the master copy of the mailbox data on the Exchange server.

Click on **File – Open - Import – Export to a file - Next > - Outlook Data File (.pst) – Next >**

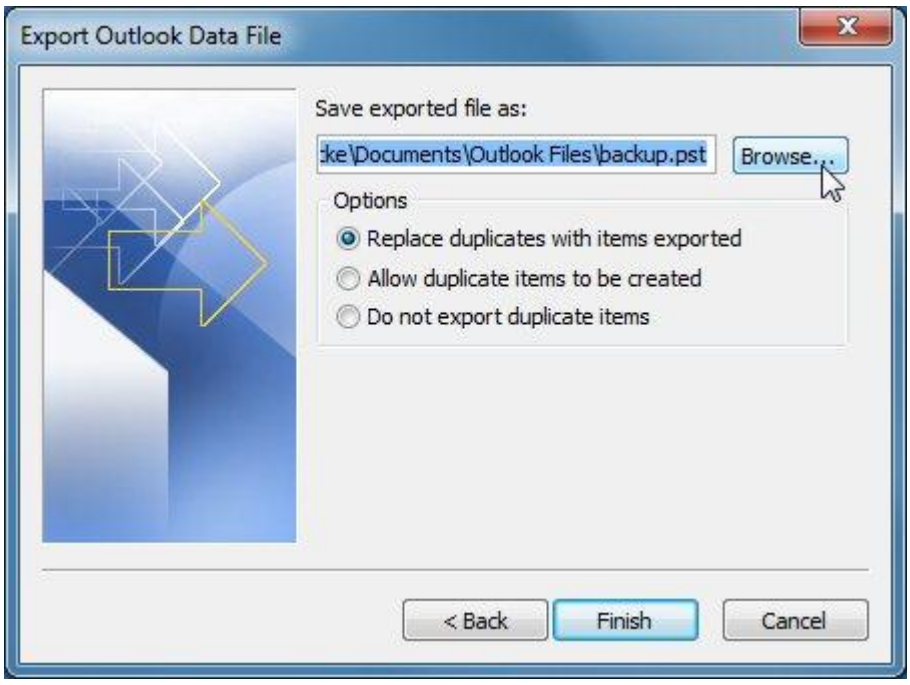
Select the top entry labelled with your email address.



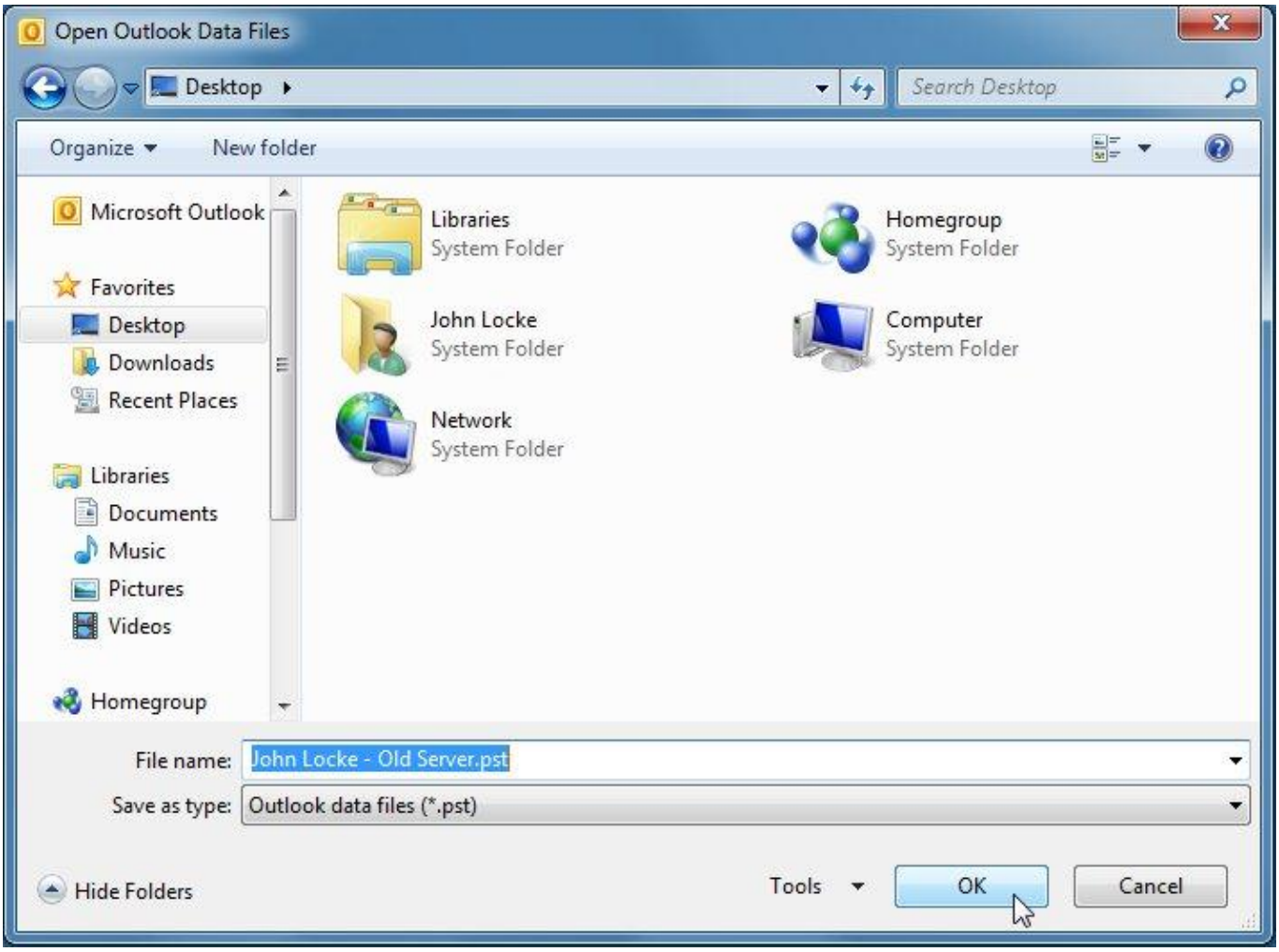
then select **Include subfolders**

and click: **Next >**

On the next screen click: **Browse…**



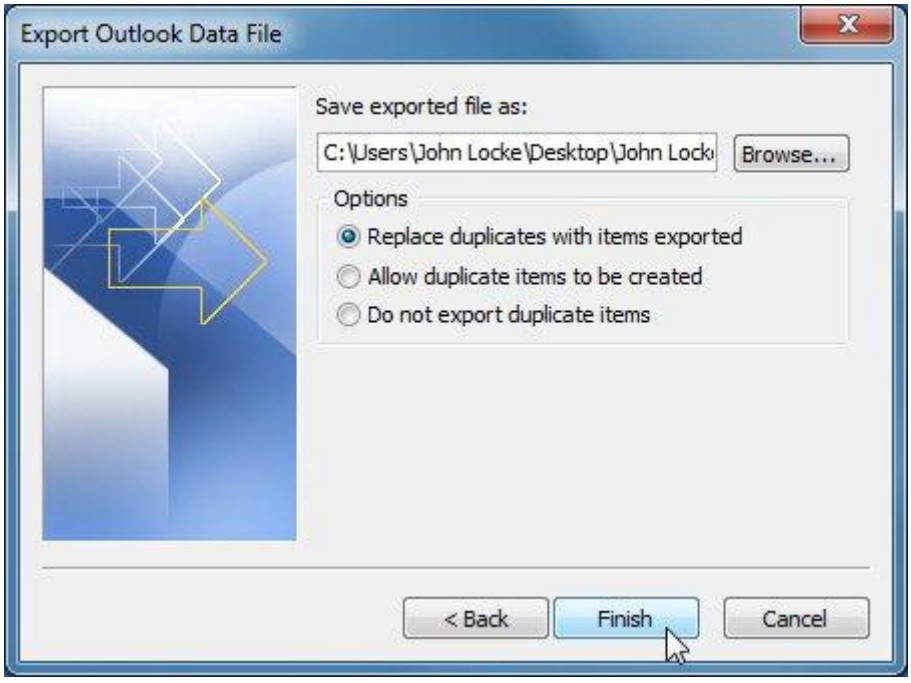
You now need to choose a name and location for the PST file.



We recommend you click **Desktop**, in the left-hand column, and save the PST file there to make it easy to find. Choose a descriptive name, then click: **OK**

Back on the **Export Outlook Data File** screen,

Replace duplicates... is the correct option to select.



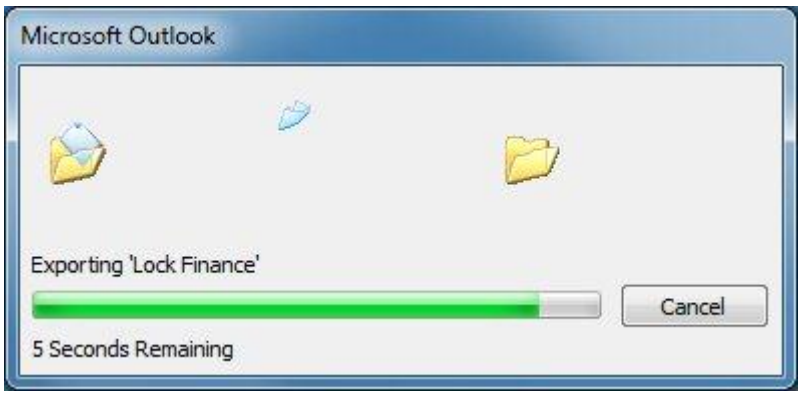
Click: **Finish**

There's normally no need to password-protect the PST file.

Click: **OK** to begin the export process.

This window will display while the exporting is taking place:-

The time remaining is only for the current folder so you don't know how long the whole process will take.

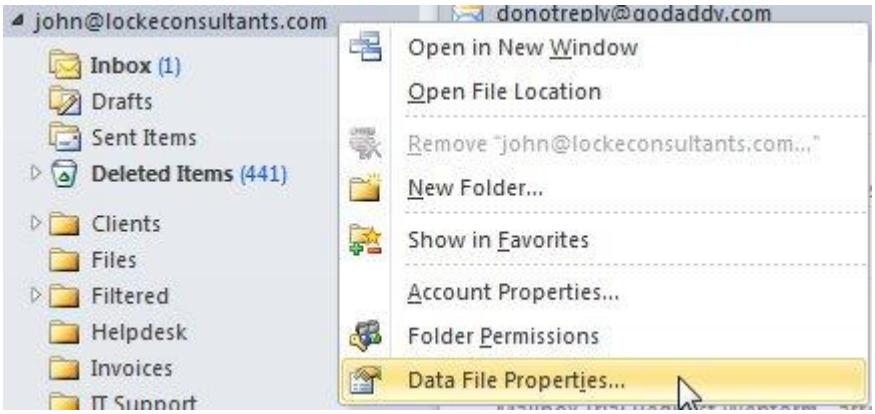


This is a local file operation, where nothing is passing over the Internet, so it should take about 10 minutes for every gigabyte in the mailbox, depending on the speed of your PC.

When this process has finished you can do a quick check by comparing the size of the PST file created with the original mailbox size.

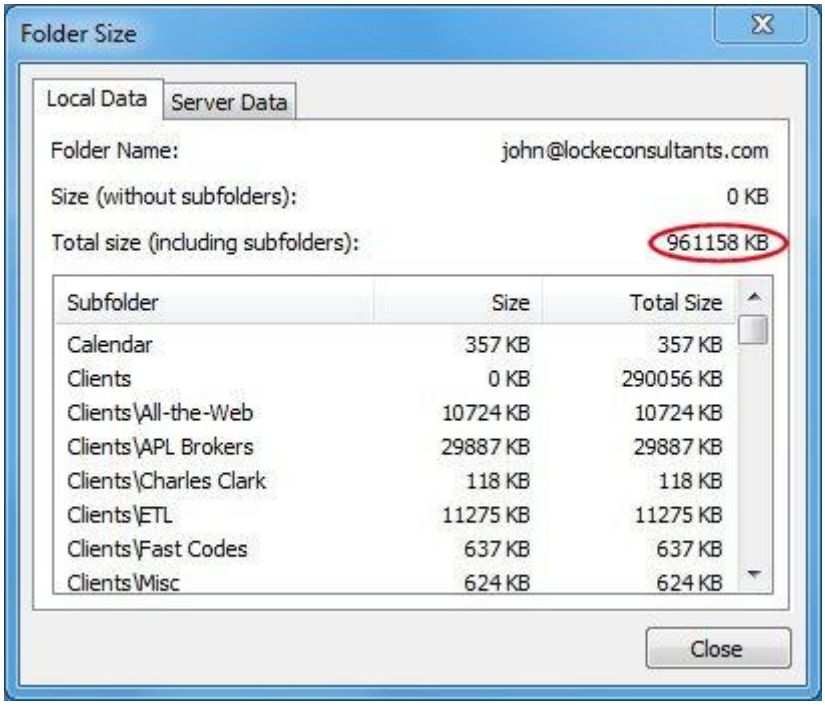
Right-click on **Mailbox - <name>** and select:-

Properties for "Mailbox…"

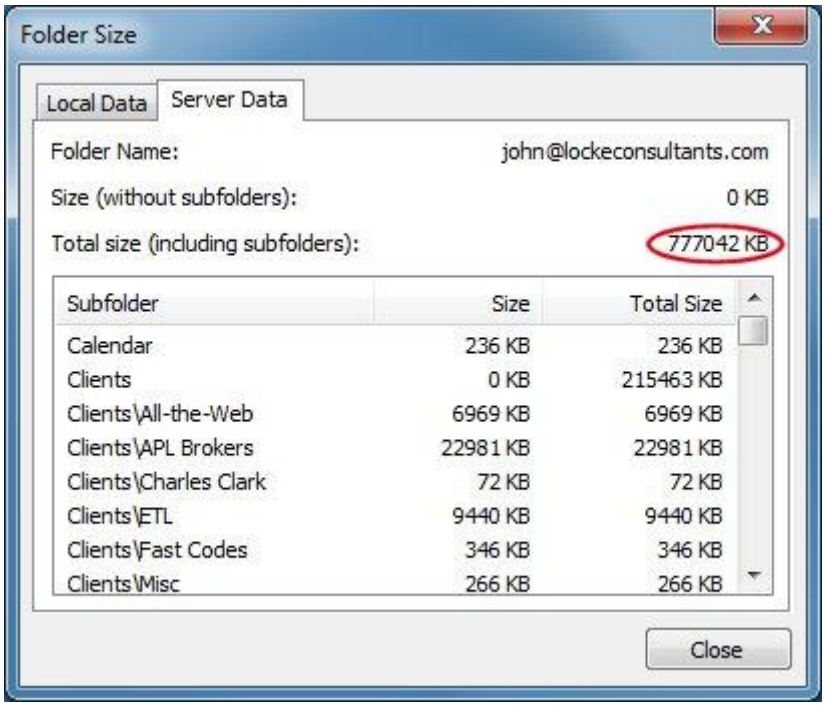


Then click: **Folder Size…**

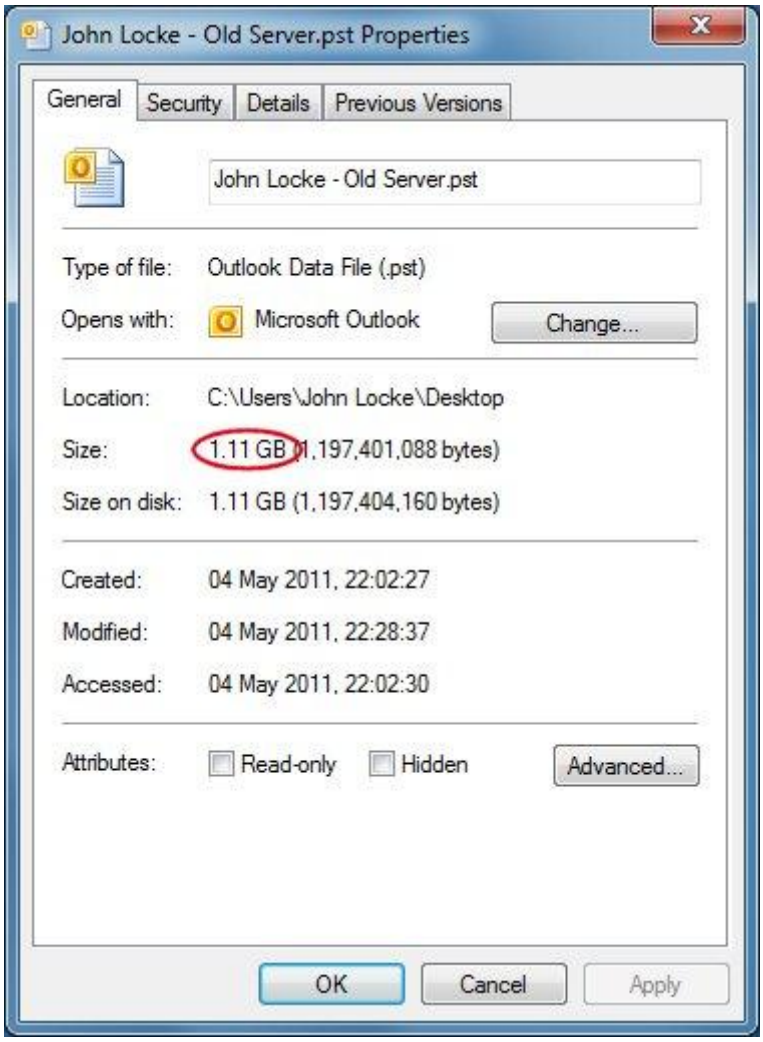
The total size of the mailbox in the Local Cache is shown as 961mb.



The size of the Server Data shows as 777mb even through the Local Cache is fully synchronised.
This size difference is due to the different compression and encryption techniques Outlook uses compared to the Exchange server.



Right-click on the PST file on the Desktop and choose **Properties**:-



The size of the PST file is 1110mb.

Again, the Local Cache and the PST file are using different compression and encryption techniques and so it's not a problem that the 2 sizes are different.
The PST file can be up to 20% bigger than the Local Cache.

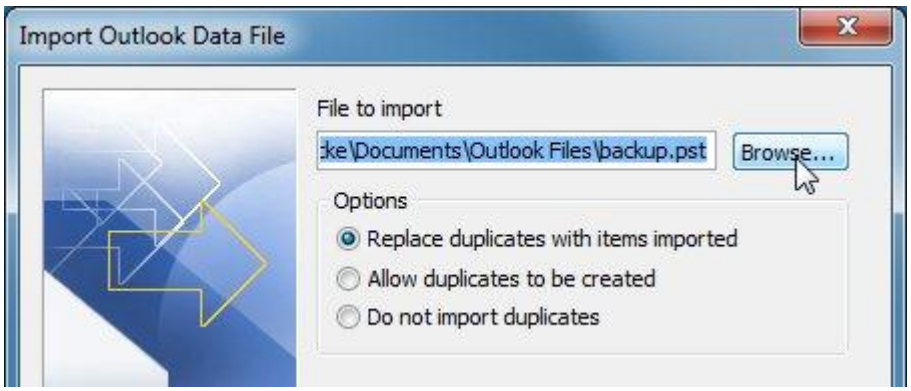
If the PST file is smaller than the Local Cache then not all the mailbox exported successfully and you should try again.
Maybe you didn't select the whole of the mailbox or perhaps your local drive is full.

2 – Importing the PST file into your Pushex mailbox

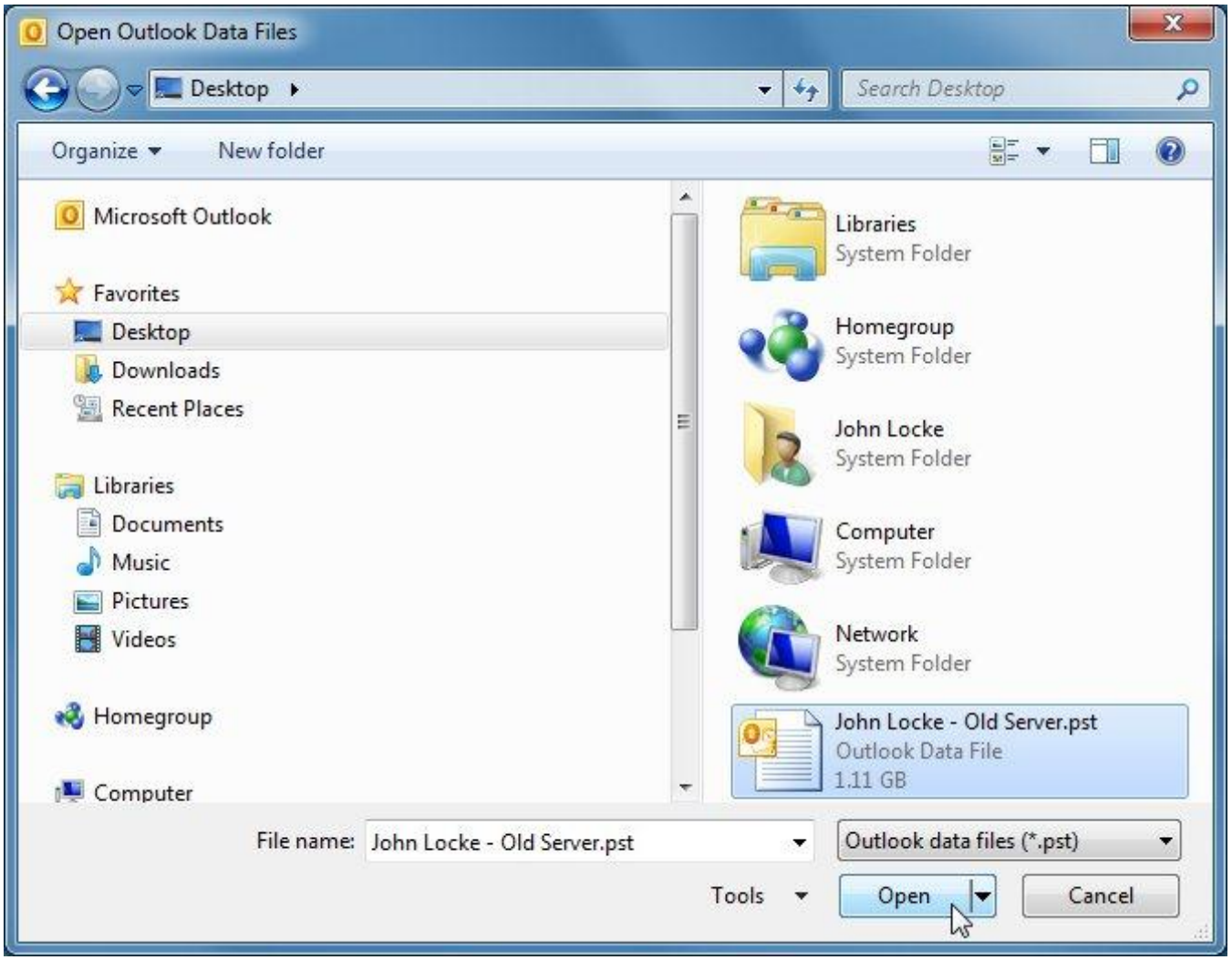
Close Outlook, select the **Pushex** profile and then restart Outlook.
Click:-

File – Open - Import – Import from another program or file - Next > - Outlook Data File (.pst) – Next >

On the next screen click: **Browse…**

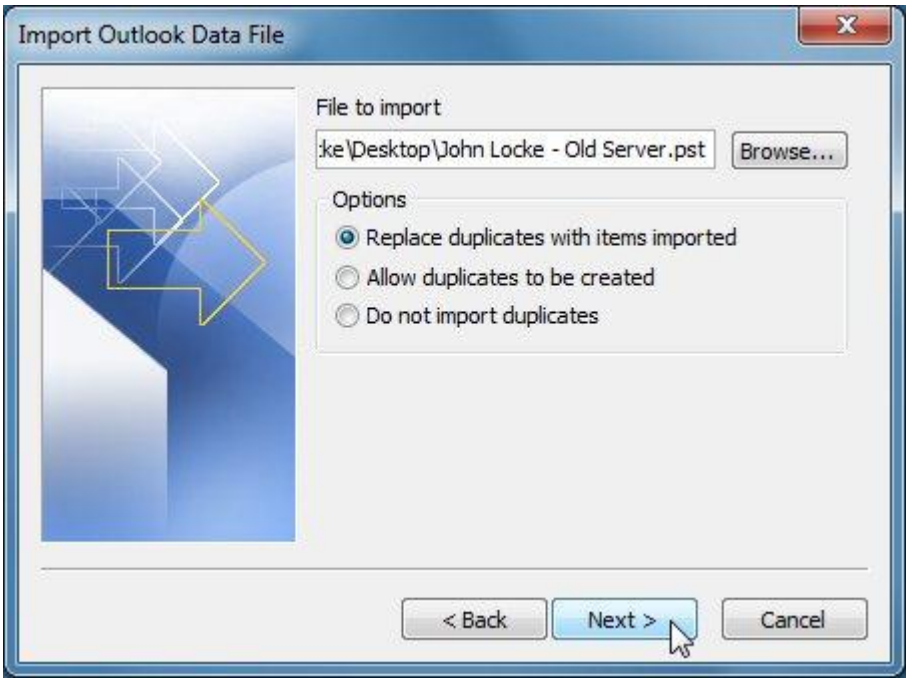


Click: **Desktop**, select the PST file you created in Section 1 then click: **Open**



Back on the **Import Personal Folders** screen,

Replace duplicates... is the correct option to select.



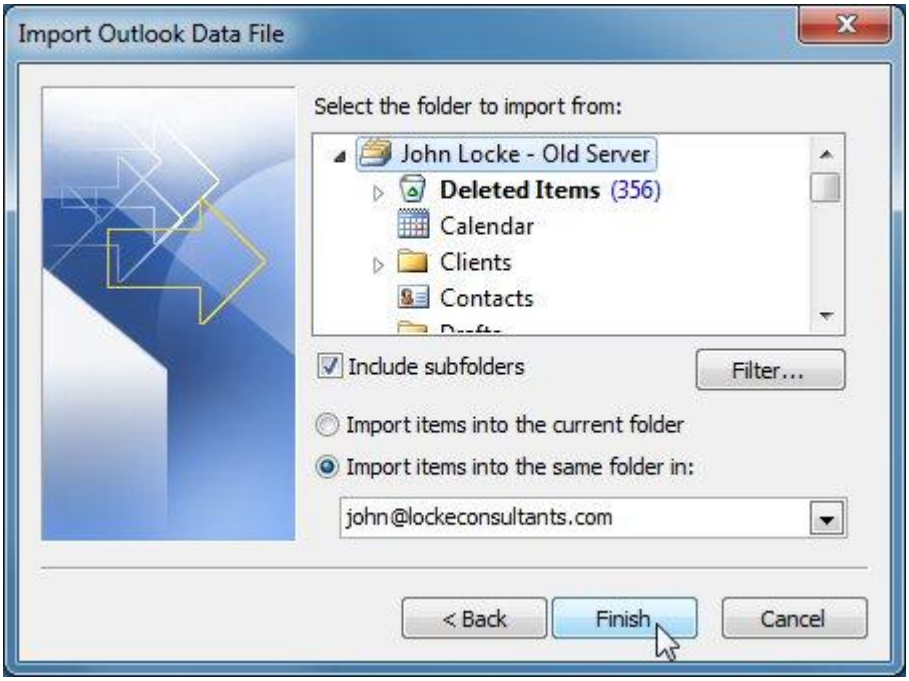
Click: **Next >**

Select the top-level folder,

Select: **Include subfolders**

Import items into the same folder in:

<your email address>



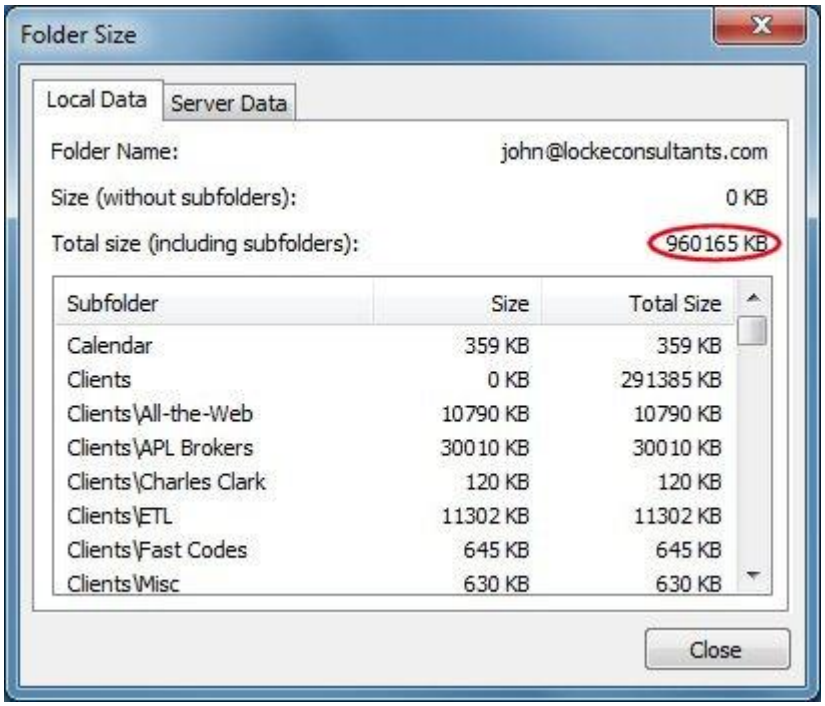
Click: **Finish** to start the import process.

This window will display while the exporting is taking place:-

The time remaining is only for the current folder so you don't know how long the whole process will take.
The data is being imported into the Local Cache and so nothing is passing over the Internet.
It should take about 10 minutes for every gigabyte of PST file, depending on the speed of your PC.

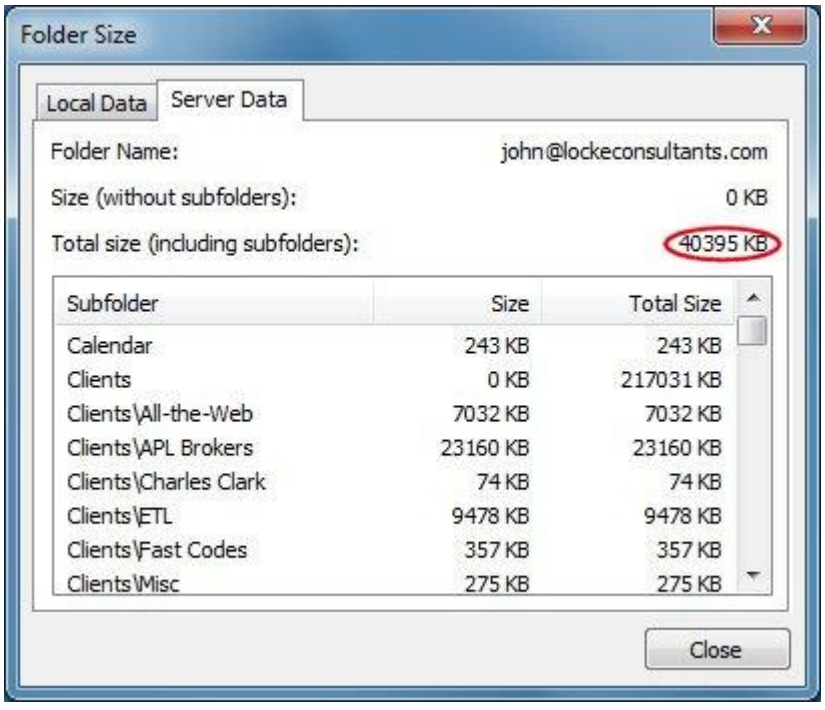
After the importing has finished let's look at the size of the Local Data:

Again, it's pretty close the original Local Data size of 961mb so you can be fairly confident that everything has been imported.



However, the sizes shown on the **Server Data** tab are very different: -

This is because the **Local Data** hasn't had a chance to synchronise with the **Server Data**, which will require approximately 1GB of data to be uploaded to the server.



If you have an 8mb/s ADSL broadband connection the "A" in ADSL means that the speed you can ***upload*** data will be around a tenth of your ***download*** speed.
At 800kb/s, 1GB will take around 3 hours to upload; other factors, such as contention with other broadband users, may mean it will take considerably longer.

This difference between the **Local Data** and the **Server Data** is not necessarily a problem.
Outlook will eventually bring the 2 data stores into sync and, if you only use Outlook on one PC, then you'll still be able to access all your email data during synchronisation. However, until the master copy of your data on the server is up-to-date, Outlook on ***other*** PCs and OWA won't have access to your full email archive.
Where this is a particular problem is if you are using one PC to migrate multiple users between Exchange servers and, when you've finished, the PC won't be used again for these profiles
In this case, to avoid losing some email data, you have to make sure that the **Local Data** has synced with the **Server Data** before you move on to the next mailbox.

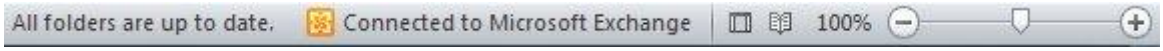
Whether you're migrating one, or many, mailboxes, we recommend that you now force Outlook to synchronise the **Local Data** and **Server Data**.

Select **Send/Receive All Folders** on Outlook's Send/Receive tab

Synchronising the Server Data with the Local Cache is neither sending nor receiving and so you don't get a progress window, but there will be a message in the bottom right of the Outlook window to indicate that Outlook is still updating the Server Data.

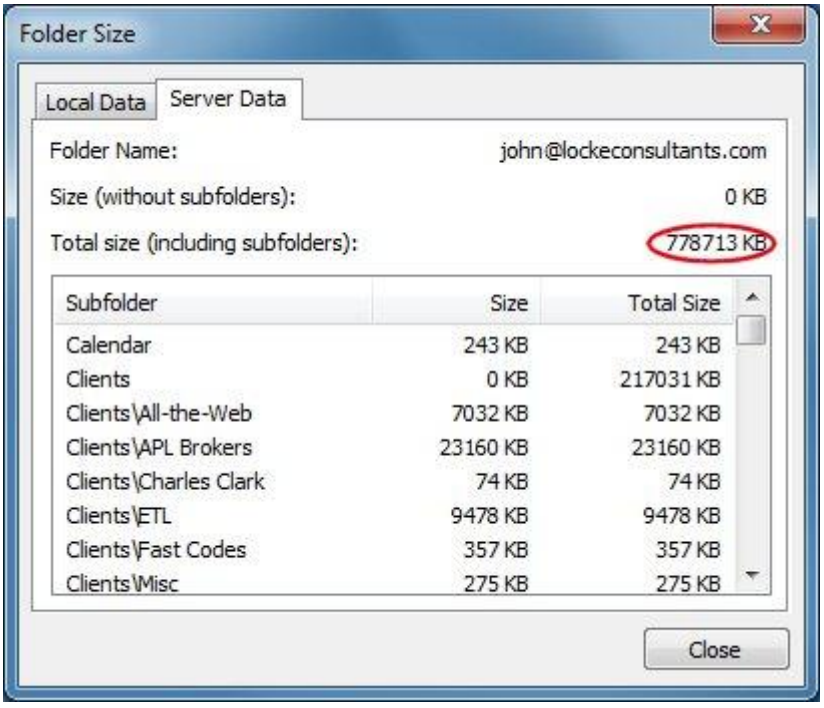
3 hours per GB is a good guide to how long it should take over an average broadband connection.

It's OK to close Outlook and then resume later if you need to.
This process can swamp your Internet bandwidth and make Internet access slow for other programs and users.
When synchronisation is complete you will see the **All folders are up to date** message in the bottom right corner of the Outlook window:-



The **Server Data** will now be much larger.

779mb is still a long way off of 961mb but it's pretty close to the Server Data figure of 777mb on the old Exchange server.
It would be nice and reassuring if all these mailbox sizes were exactly the same.
If you're not convinced that all your data has been migrated, you can compare the number of emails in a few folders, using OWA which only looks at **Server Data**, with the same folders on the old Exchange server.



It's good if you can keep access to the old Exchange server, or even just the PST file, for a week or so in case you discover some emails that haven't come across.

The migration of your main email data is now complete.
The rest of this document deals with other data and settings you may need to transfer.

3 – Transferring Inbox Rules

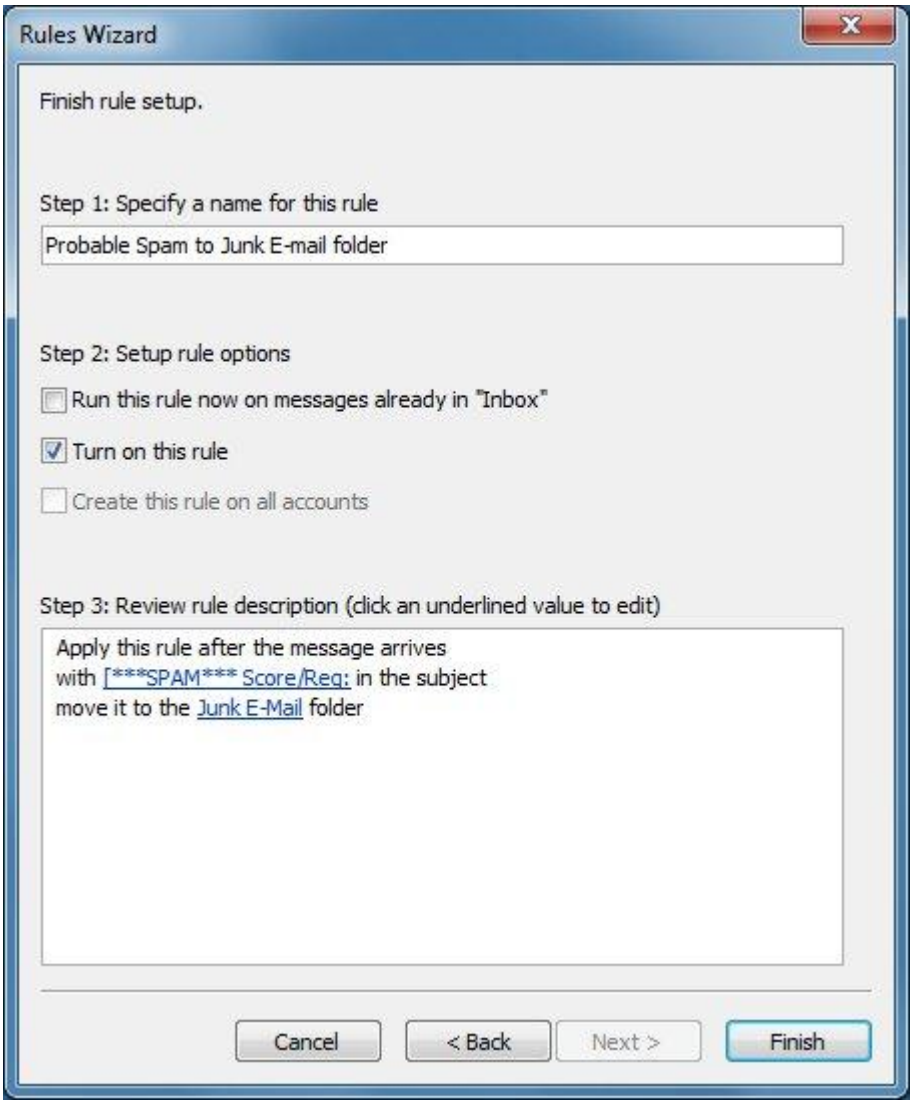
Inbox Rules are mostly used as an automatic filing system so that incoming emails, matching certain criteria, are moved to a specific folder and never appear in your Inbox.
There are 2 types of rules you can create in Outlook: Server Rules and Client-Only Rules.

Server Rules are stored on the Exchange server, are in operation all the time and can be edited from Outlook on any PC or from OWA.
Client-Only rules are stored on just one copy of Outlook and only apply when that Outlook is open.

Server Rules are therefore more useful but, if you operate Outlook in standalone mode (without access to an Exchange server), then Client-Only Rules are all you have available.

Exchange has a limit to how much storage space each user has available for all their Server Rules.
With Exchange 2010 the default limit is 64kbytes but, for all our mailboxes, we have this turned up to the maximum value of 256kbytes which is enough for at least 100 rules.

An example of a rule is the one we create for every new mailbox, to make it work better with our anti-spam system:



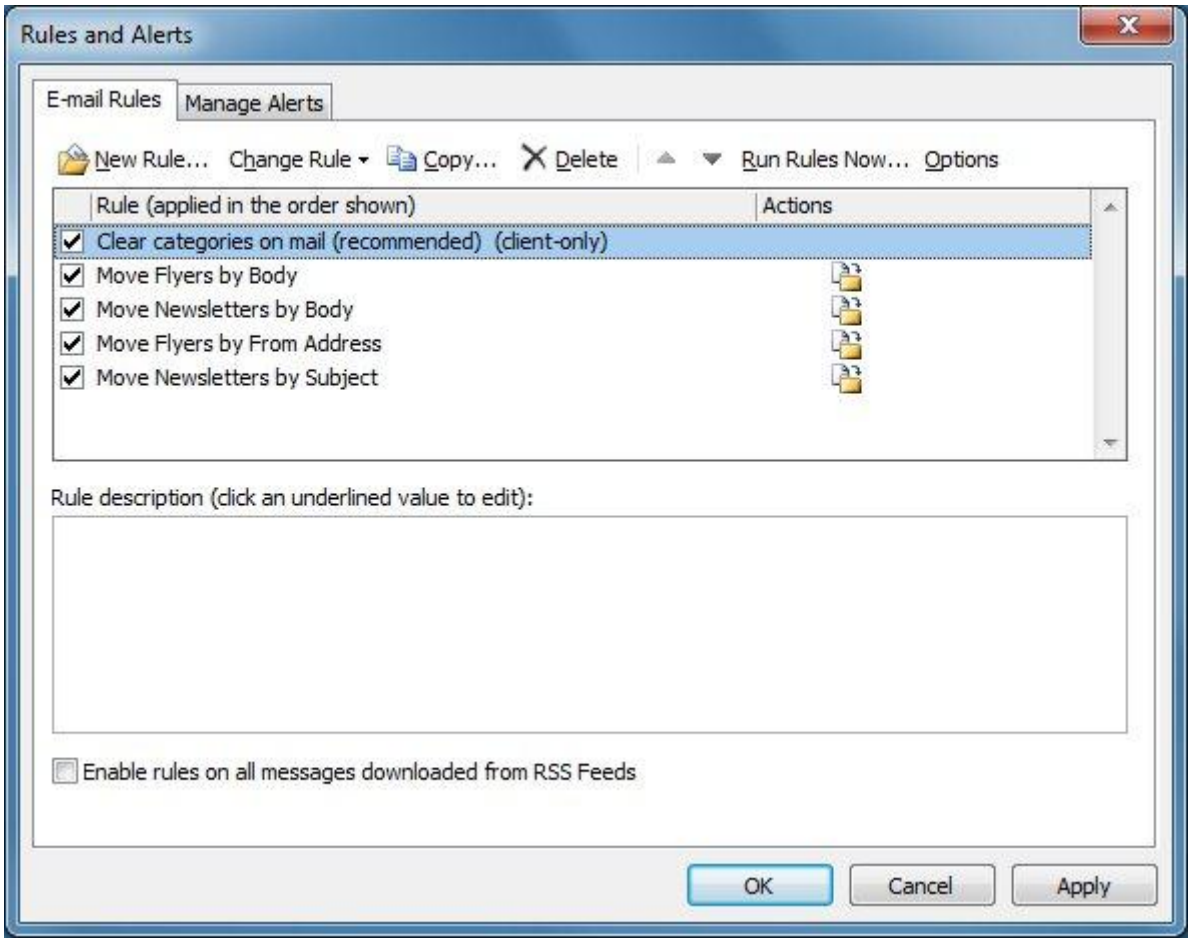
I think you can work out what's going on here:

This is a Server Rule that runs whether or not Outlook is running.

Anyway, if you use Server Rules then it's much nicer if you can transfer over your existing rules rather than having to recreate them, from scratch, on the new system.
If you ***don't*** use rules then you can skip the rest of this section.

To access your rules, open Outlook, go to the **Home** tab and select:-

Rules – Manage Rules & Alerts…

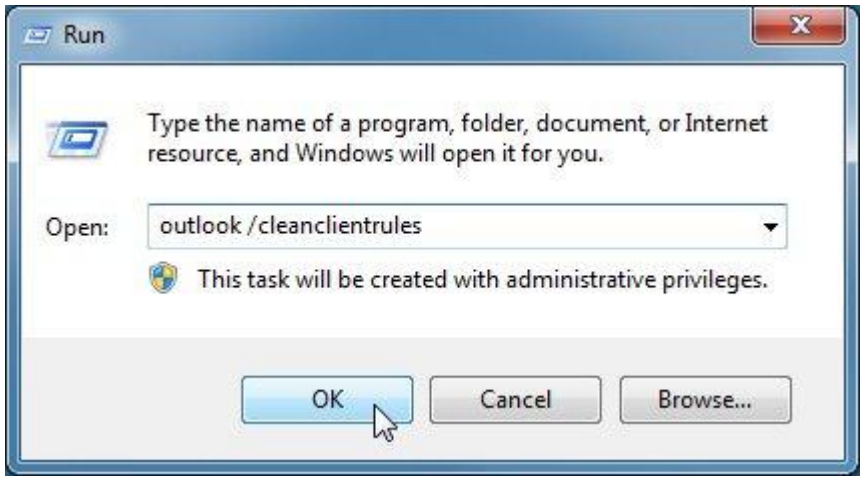


In this example there are 4 Server Rules and one Client-Only rule (highlighted at the top). This particular Client-Only rule is one that Outlook creates for you to remove any ***category*** that may have been assigned to incoming emails. You can delete this rule if you want but it's generally harmless..

Now might be a good opportunity to review your rules and delete any you no longer need.
If you have any Client-Only that won't delete, perhaps because they are corrupt you, can start Outlook with the **/cleanclientrules** option to delete all Client-Only rules.

To do this, close Outlook then click **Start – Run** then type: **outlook /cleanclientrules** and click **OK**

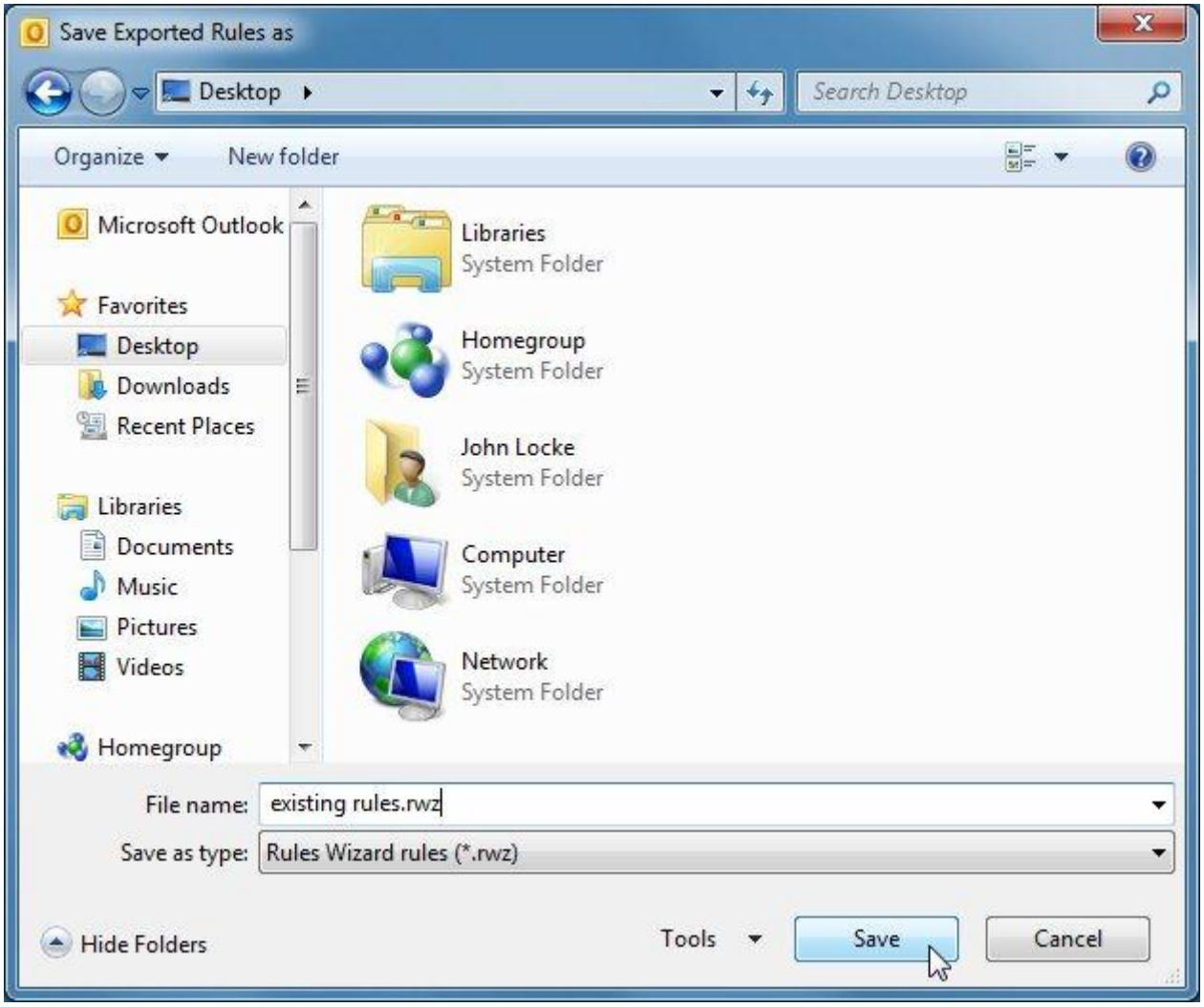
If your Windows 7 Start menu doesn't show the Run option then type this command into the Search box.



Back on the **Rules and Alerts** screen click: **Options**

then **Export Rules…**

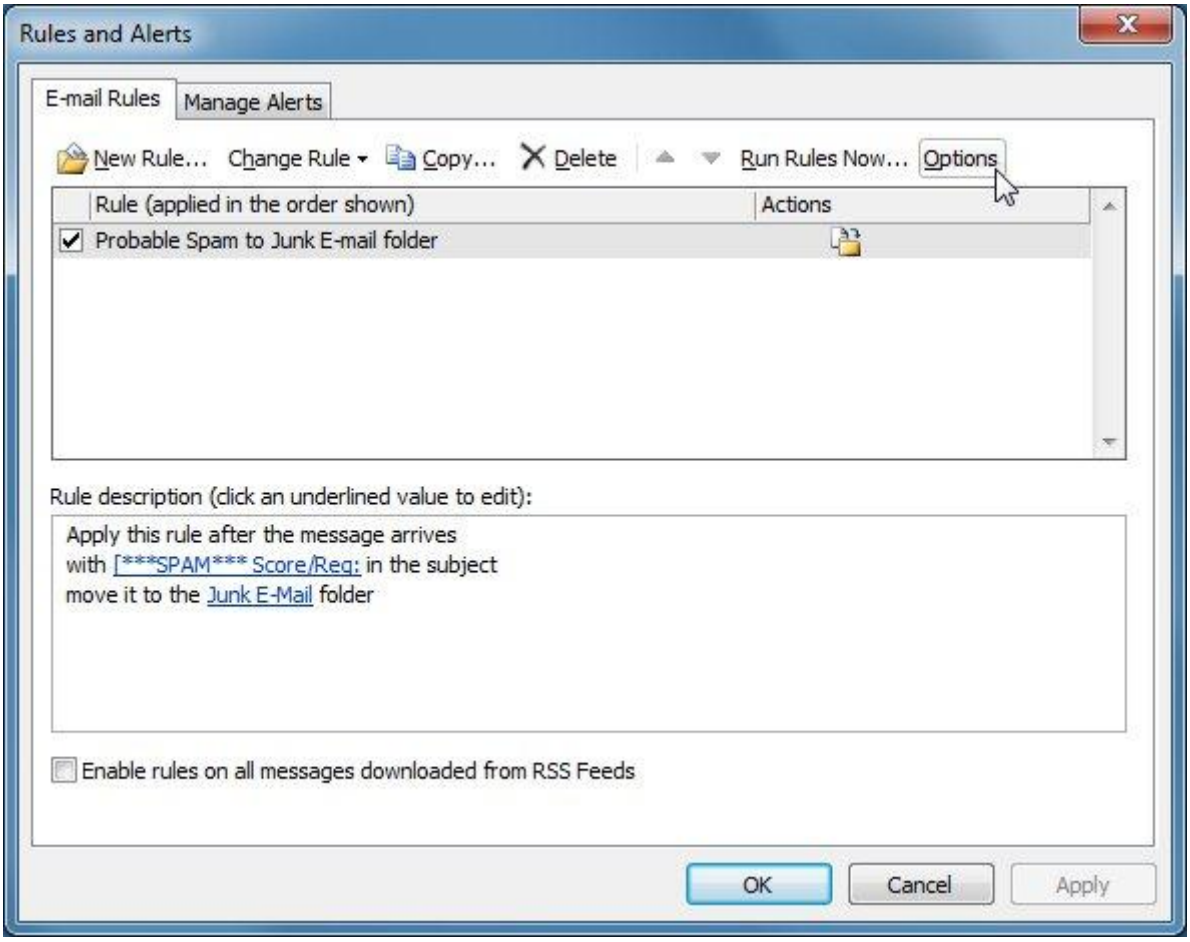
Select: **Desktop**, choose a name for the rules file then click: **Save**



This will create an RWZ file on your Desktop.

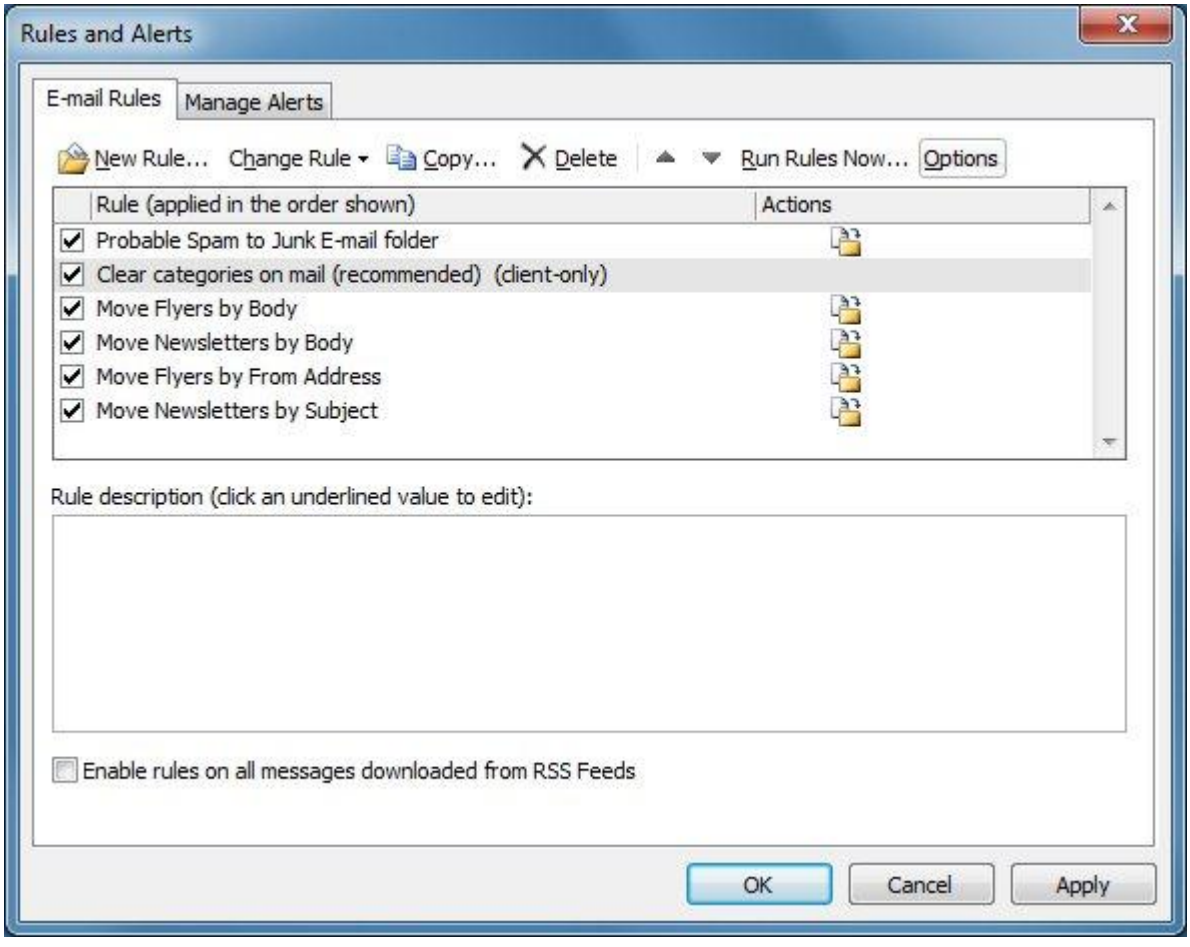
Click **OK – OK** then close Outlook,
switch to the Pushex profile, as described on page 1,
restart Outlook and, on the **Home** tab, click **Tools – Manage Rules & Alerts…**

Your new mailbox will have the **Probable Spam** rule we created for you:-



Click: **Options – Import Rules… - Desktop**
then select the file **existing rules.rwz** then **Open - OK**

Your old rules have now been imported, including the default Client-Only rule.



However, there may be a problem…

If you click: OK and get this warning message:-

Click: **No** and go through each imported rule to see what information is missing.
It's usually the destination folder where you want to move an email ***to*** that has got lost.

After fixing all the rules click: **OK** to finish and the process of transferring inbox Rules is complete.

4 – Transferring your Signature

All the copies of emails you've sent in the past, stored in your Sent Items folder, will contain your signature so, after your email archive has been moved across to the Pushex servers, copy the signature from an email you've sent, and go to:-
File – Options… - Mail – Signatures…
and paste it into a new signature.

We recommend keeping signatures simple as pictures in a signature can increase the likelihood of your emails being classified as spam. There's also no real need to put your email address in a signature as it's already on every email you send.

5 – Accessing your Email Archive and other PST files

Outlook has always encouraged you to move emails, over a certain age, say 6 months, out of your mailbox and into a separate set of folders stored locally on your PC in a file called **archive.pst**.

We're not going to discuss, here, whether or not this is a good thing to do, but just tell you how to regain access to your Archive folders, if you use this feature.
You may also have other local PST files that you like to have open in Outlook, along with your main Exchange mailbox.
By default, in Windows 7 all the PST files used by Outlook are stored in this folder:-
C:\Users\<user name>\My Documents\Outlook Files
(Substituting, of course, your username for <user name>)

If you just want to have your Archive folders visible in your Pushex profile you don't have to move any files or even use Windows Explorer.
From Outlook click:-
File – Open – Open Outlook Data File

This shows a list of all the PST files in the default storage folder:-

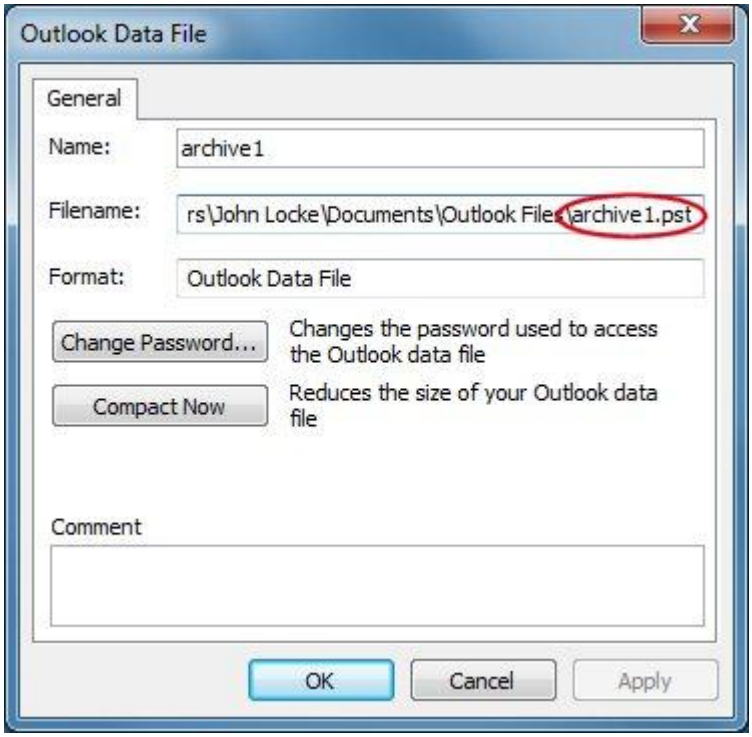
Select the one you want to open and click: **OK**

The Archive Folders will now be visible as a separate folder tree beneath your Pushex mailbox folder tree:-

In this case it was pretty obvious which PST file you needed to open but there could have been lots of PST files in this folder and perhaps many with the word "archive" in their name.

If you are in doubt which PST file to open, re-open Outlook with the **Company Exchange Server** profile and right-click on the Archive Folders top-level folder and select:-

Data File Properties… – Advanced…



The **Filename:** line shows the name and location of the PST file.
You may need to select this line then press **End** to scroll to the right so you can see the file name.

Repeat the process if you have other PST files you want to be displayed in the left-hand column in Outlook.

6 – Transferring Additional Accounts

Along with your main Exchange account, Outlooks allow you to setup other POP/SMTP or IMAP accounts you may use to access email accounts on other mail-servers.
At Pushex we encourage users to just have one account and to forward emails from other accounts to their main mailbox, or have our server collect emails from your POP3 accounts on other servers and drop them into your mailbox.
One reason for this is that PST files on your PC aren't usually backed up and can't be accessed from other PCs, while your main mailbox ***is*** backed up and ***can*** be accessed from multiple PCs and smartphones.
So ***all*** of your email in just one safe place, accessible from everywhere, is best, but if you still want to have multiple accounts then that's OK too.

An Outlook profile contains the settings for all your accounts and so when you create, and start using, a new profile for Pushex, it won't contain any of the extra accounts you had setup in the old profile and so you'll need to re-create them.

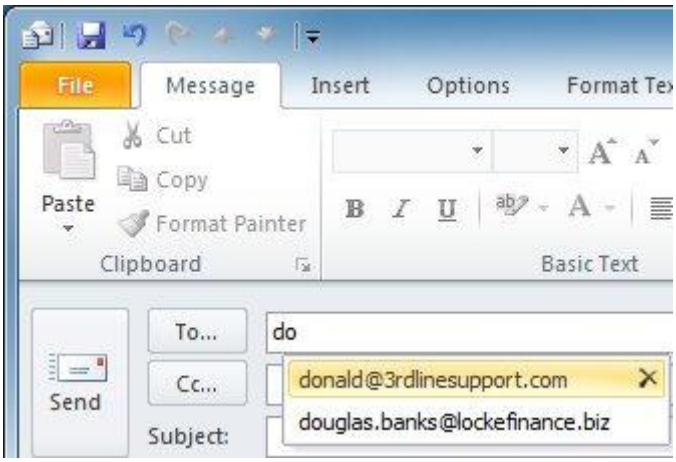
That's it really.
Outlook doesn't have any function to export and import account settings between profiles. There are some 3rd party programs that claim to do this plus there's some Registry editing that can copy account details but not the passwords.

Manually recreating your extra accounts in the new profile is the best we can suggest.
If you don't have the account details written down anywhere you can extract all the details, except for the passwords, by examining the accounts in the old profile. Maybe the operators of the additional accounts have websites where you can recover the passwords for those you don't know.

There's a free utility called **System Information for Windows** that's pretty good at revealing email account passwords you have stored on your PC. Download if from here: http://www.gtopala.com/siw-download.html

7 – Transferring the Email Address Auto-Complete Cache entries or Nicknames

Nicknames are the email address suggestions that pop-up when you're filling in the **To:** line of a new email after you've typed a few letters:



Outlook stores up to 1000 email addresses from the most recent addresses you've sent emails to and offers the best matches.

If a user whose mailbox you have carefully migrated to our system calls and says,
"All my contacts are missing".
What they probably mean is,
"I never store email addresses in Outlook Contacts but just rely on the auto-complete cache whenever I need to find an email address, and it's not there anymore".
There must have been a lot of calls like this because now, with Outlook 2010 and Exchange 2010, the auto-complete cache is stored on the server as part of your mailbox data and so will be consistent across all the PCs you use Outlook on plus in OWA.
But this document is about migrating an account between 2 different Exchange servers and, even if the server you are moving ***from*** is Exchange 2010, there's no easy way to migrate your existing AutoComplete settings.

There are 3 ways you can respond to your user:-

1. Do nothing and tell them they are being stupid for not storing important addresses in contacts.
2. Tell them to press **Ctrl+K**, after typing the first few letters of an email address, which will make Outlook search through Contacts for the best match, and tell them that soon all the auto-suggestions will return.
3. Migrate over the nickname files after you've migrated their mailbox.
   That's what this section is about, it's not very hard and it prevents those phone calls.

Outlook 2010 stores its AutoComplete entries in this folder:-

C:\Users\<user name>\AppData\Local\Microsoft\Outlook\RoamCache
(Substituting, of course, your username for <user name>)
in a file called **Stream_Autocomplete_0_4598481D4C8EAD4F99B65BB352438818.dat** where the part of the filename after **Stream_Autocomplete_** will vary.
If Outlook 2010 is working with an Exchange 2010 server then this file is the off-line cache of your mailbox's AutoComplete entries but with any other Exchange server, it is the ***only*** copy of your AutoComplete entries.

The first thing to do is to identify which file belongs to your old Exchange server. Unless someone has been using the new Pushex profile to send emails, there should only be one **Stream_Autocomplete** file.
If there are several such files then you can open them in Notepad to see the email addresses, look at the "Last Modified" date and compare their sizes. If you are still struggling to identify the file you want, open Outlook with the Company Exchange Server profile, send an email to an address that doesn't appear in the auto-suggestions as you type it in, close Outlook and see which file has the most recent "Last Modified" date.

Make a note of this file name, in our example let's say it's:
Stream_Autocomplete_0_4598481D4C8EAD4F99B65BB352438818.dat

Now open Outlook with the Pushex profile and send an email to anybody in order to create an AutoComplete entry in a new **Stream_Autocomplete** file.
Close Outlook and you should find a new file in the RoamCache folder, lets say it's called:-
Stream_Autocomplete_0_220E4A8E1C367447B21851C7D1BB0B9C.dat

To migrate over the auto-complete cache:

1. Close Outlook, open Windows Explorer and navigate to the RoamCache folder.

2. Rename:-
   Stream_Autocomplete_0_220E4A8E1C367447B21851C7D1BB0B9C.dat to
   Stream_Autocomplete_0_220E4A8E1C367447B21851C7D1BB0B9C.old

3. Copy and paste:-
   Stream_Autocomplete_0_4598481D4C8EAD4F99B65BB352438818.dat to the same folder.

4. Rename:-
   Stream_Autocomplete_0_4598481D4C8EAD4F99B65BB352438818 - Copy.dat to
   Stream_Autocomplete_0_220E4A8E1C367447B21851C7D1BB0B9C.dat

5. Restart Outlook with the Pushex profile and the AutoComplete entries from the previous server should now be available.

If the folder containing the **Stream_Autocomplete** files doesn't appear to exist it's because Microsoft's hidden it from you, on purpose, and we have support articles you can download which show you how to unhide it.

8 – Transferring Public Folders

Public Folders are only used when there are groups of users sharing the same information so, if you only have one mailbox with us, this section isn't relevant.
Also, if your company is transferring multiple mailboxes to our system, then, as you only have to transfer the Public Folders once, maybe someone else is doing that and all you have to worry about is your own mailbox.
Many companies don't use Public Folders, but then Pushex is one of the few Exchange 2010 Hosted mailbox providers that continues to support Public Folders so perhaps that's why you chose us.

If the above 3 statements haven't helped and, you've ***still*** got Public Folders to transfer then let's get on with it.

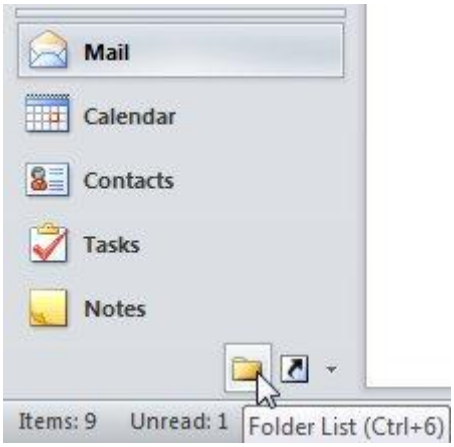
What makes transferring Public Folders a little tricky is that they can contain all the various types of Outlook data: emails, calendars, contacts, tasks and notes and also regular files. Calendars, especially, don't display in Outlook in a convenient way that allows a simple click-and drag of all the items in a folder.

Prerequisites:-

1 – The person transferring the Public Folders must have Read permission for all the Public Folders, including sub-folders, on the source server.

2 – The person importing the Public Folders into our Exchange server must have been assigned, by us, full permissions to create sub-folders under your company's root Public Folder.

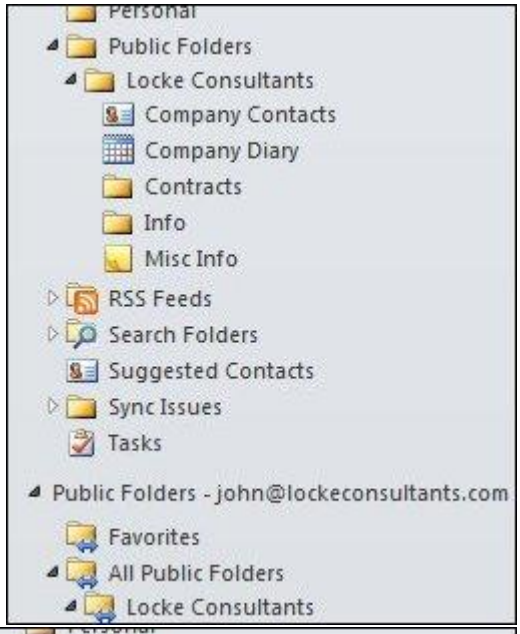
Select the **Company Exchange Server** profile and start Outlook.
Create a new top-level folder in the mailbox called **Public Folders**



Click the **Folder List** button in the bottom left to switch the left-hand column display to show all folders.

Click-and-drag the top-level Public Folder, called **Locke Consultants**, up to the new folder you created called **Public Folders**.

The folder structure and contents of the Public Folders will then copy across to your mailbox:



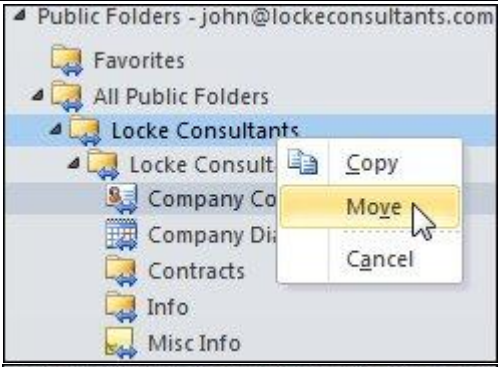
Now follow the process, detailed in **Section 1**, but this time just select the Public Folders section of your mailbox to export to a PST file, called Public Folders, on your Desktop.

Close outlook, select the **Pushex** profile and restart Outlook.

Follow the instruction in **Section 2** to import the Public Folders PST file into your Pushex mailbox so it will have a new top-level folder called Public Folders identical to the one in your old mailbox.

Now click-and-drag folder Locke Consultants from ***your*** mailbox, under Public Folders, to the Locke Consultants folder under **All Public Folders**
(You can then delete the **Public Folder** folder in your mailbox.)

So now all the Public Folders have been copied back to your root PublicFolder on the Pushex server, but they're in the wrong place.



Right-click on each Public Folder, one at a time, and drag it to the uppermost **Locke Consultants** public folder, then select **Move**

Finally, right-click on the lowermost **Locke Consultants** Public Folder (now empty) and select **Delete**.
The Public Folders have now been transferred successfully.

A final job is to right-click on each Public Folder and choose:- **Properties – Permissions** and set the correct access permission for all your users. If any of your Public Folders were mail-enabled then ***we*** have set this up for you on the new server. If a folder is mail-enabled, **Default** and **Anonymous** need to have the **Contributor** permission, otherwise their permissions must be set to **None**.