



Microsoft® Online Services

Migrate from Exchange Public Folders to Business Productivity Online Standard Suite White Paper

Microsoft Corporation

Published: July 2009

Microsoft

Information in this document, including URL and other Internet Web site references, is subject to change without notice. Unless otherwise noted, the companies, organizations, products, domain names, e-mail addresses, logos, people, places, and events depicted in examples herein are fictitious. No association with any real company, organization, product, domain name, e-mail address, logo, person, place, or event is intended or should be inferred. Complying with all applicable copyright laws is the responsibility of the user. Without limiting the rights under copyright, no part of this document may be reproduced, stored in or introduced into a retrieval system, or transmitted in any form or by any means (electronic, mechanical, photocopying, recording, or otherwise), or for any purpose, without the express written permission of Microsoft Corporation.

Microsoft may have patents, patent applications, trademarks, copyrights, or other intellectual property rights covering subject matter in this document. Except as expressly provided in any written license agreement from Microsoft, the furnishing of this document does not give you any license to these patents, trademarks, copyrights, or other intellectual property.

© 2009 Microsoft Corporation. All rights reserved.

Microsoft, Groove, InfoPath, Outlook, SharePoint, and Windows, are trademarks of the Microsoft group of companies.

All other trademarks are property of their respective owners.

Contents

Overview	1
Public Folders Scenarios and Recommendations	1
Basic Sharing of Events, Tasks, and Contacts	1
Archiving E-Mail Messages or Discussion Lists.....	3
Document Sharing	5
Manual Workflow.....	6
Automated Workflow	6
Custom Applications	7
Free/Busy Lookups, OAB Distribution, and Outlook Security Settings.....	7
E-Mail Delegates, Send As, and Shared Mailbox.....	8
Public Folder Content Migration.....	9
Migration from Publish Folders to SharePoint Online	9
Migration from Public Folders to Shared Mailbox	10

Overview

Exchange public folders are widely used in on-premises Exchange environment. However, Microsoft® Exchange Online does not support customer usage scenarios of public folders. If you or your customers are using Exchange public folders, there are special considerations for moving customers to Microsoft Business Productivity Online Standard Suite.

This document outlines these considerations, discusses the most common public folder scenarios and how they are represented in Business Productivity Online Standard Suite services. It also provides the information you need to decide whether Microsoft Online Services is a good match for you based on your current public folder usage.

Public Folders Scenarios and Recommendations

This section describes common public folder scenarios and proposal for accomplishing those scenarios in Business Productivity Online Standard Suite services.

- [Basic Sharing of Events, Tasks, and Contacts](#)
- [Archiving E-Mail Messages or Discussion Lists](#)
- [Document Sharing](#)
- [Manual Workflow](#)
- [Automated Workflow](#)
- [Custom Applications](#)
- [Free/Busy Lookups, OAB Distribution, and Outlook Security Settings](#)
- [E-Mail Delegates, Send As, and Shared Mailbox Scenarios](#)

Basic Sharing of Events, Tasks, and Contacts

Scenario Description

Exchange public folders are frequently used to set up calendars, task lists, and contact lists for team or company-wide collaboration. People with appropriate permissions are able to view and edit the lists.

Recommendations

You can use Microsoft SharePoint® Online or use the Shared Mailbox feature of Exchange Online to accomplish this scenario.

Use SharePoint Online

For this usage scenario, you can migrate the content to SharePoint Online. SharePoint Online provides rich functionality for managing events, tasks, and contacts, while still preserving full drag-and-drop and bidirectional synchronization with Microsoft Office Outlook® for a similar experience as your Exchange public folders.

How to Do This

1. Create a custom list of the appropriate type on a SharePoint Online site collection to store events, tasks, or contacts.

Note: For more information about how to move existing lists from public folders to SharePoint Online, see the [Public Folder Content Migration](#) section.

2. In SharePoint Online, go to the newly created list, and then select **Connect to Outlook** from the **Actions** menu.
3. You can have the same drag-and-drop and bidirectional synchronization with Office Outlook experience as that of Exchange public folders.

Note: Bidirectional synchronization does not work for document libraries. For more information, see [Archiving E-Mail Messages or Discussion Lists](#).

Benefits and Drawbacks

Benefits	Drawbacks
<ul style="list-style-type: none">• SharePoint lists provide more contexts for the data, and more flexible ways of working with the data, including combining data from multiple lists and rolling up summaries for reporting.• Moderation workflows are built into SharePoint lists, so items can be optionally made visible only after they are approved.• Item-level version history can be optionally enabled to track changes to individual items in these lists.• Users can subscribe to alerts and feeds to have change notifications automatically sent to them.	None.

Use Exchange Online Shared Mailbox

You can use the Shared Mailbox feature of Exchange Online to share events, tasks, and contacts.

Note: A shared mailbox has the same size quota as other mailboxes in the system. Unlike public folders, the quota for the shared mailbox is not independently managed.

How to Do This

1. Set up an Exchange Online shared mailbox.
2. Share some or all of the shared mailbox folders (for example, contacts, tasks, or calendar folders) with selected users.

Benefits and Drawbacks

Benefits	Drawbacks
<ul style="list-style-type: none">• Users get the same UI experience as that of public folders. For example, users get full calendaring workflows.	<ul style="list-style-type: none">• Someone with Exchange administrator rights needs to create the shared mailbox.

Archiving E-Mail Messages or Discussion Lists

Scenario Description

Exchange public folders are often used to share project-related e-mail messages, or archive discussion contents on specified distribution lists. This is typically done in one of the two ways.

- E-mail messages that need to be shared are periodically moved, copied, or dropped into a public folder by a project member. This method is typically used when only some e-mail messages are relevant for saving or sharing. This is similar to how individuals manage e-mail messages in PST files.
- A distribution list is created and a mail-enabled public folder is added to the distribution list. This method is typically used when all discussions pertaining to a project must be captured.

Recommendations

There are several ways to configure SharePoint to serve this purpose; however, both on-premises SharePoint and SharePoint Online have limitations when used for this purpose.

- The behavior when copying e-mail messages and documents from Outlook to SharePoint is different depending on the user's operating system and configuration, and in some cases it requires a two-step process of copying locally first before copying to SharePoint.
- Mail-enabled lists in on-premises SharePoint convert message files to .eml format. Attachments are lost or must be sent to a different list. SharePoint Online does not support mail-enabled lists at all.

Nevertheless, this scenario can be accomplished with SharePoint Online with some limitations. You can also use the Shared Mailbox feature of Exchange Online to accomplish this scenario.

Use SharePoint Online Only

How to Do This

1. Create a document library on a SharePoint Online site collection to house the e-mail messages.
2. Open the document library in Windows® Explorer and then copy or drag .msg files from Outlook into the explorer window. Depending on your operating system, you may need to copy them to a local folder first.

Benefits and Drawbacks

Benefits	Drawbacks
<ul style="list-style-type: none">• When in SharePoint Online, .msg files and their attachments are indexed along with all other documents in SharePoint Online.	<ul style="list-style-type: none">• The drag-and-drop operations from Outlook to SharePoint are more complicated.• Some e-mail messages have invalid URL characters in their names, and these messages cannot be copied directly to SharePoint without renaming.• Difficult to create views in SharePoint with e-

	<p>mail metadata because metadata is not automatically populated.</p> <ul style="list-style-type: none"> • There is an effective limit of 2,000 items per view in SharePoint. Therefore, if you have more than this, you will have to organize these items into sub-folders.
--	---

Use SharePoint Online and a Synchronization Add-In Client

How to Do This

1. Create a document library on a SharePoint Online site collection to house the e-mail messages.
2. Install a synchronization add-in such as [Colligo Contributor](#).
3. Follow the instructions to connect the document library to Outlook with the synchronization add-in. Once connected, your SharePoint document library appears as a folder in Outlook and you can copy or drag e-mail messages directly from any Outlook folder to this SharePoint folder.

Benefits and Drawbacks

Benefits	Drawbacks
<ul style="list-style-type: none"> • Once in SharePoint, .msg files and their attachments are indexed along with all other documents in SharePoint. • Metadata is populated, so views can be created by using metadata filtering. Metadata can also be used as workflow parameters. • Seamless integration with Outlook. • Can simulate mail-enabled lists by Outlook rule that copies e-mail messages to the SharePoint folder. • No additional Exchange storage required. Folder only appears to be in your Exchange mailbox, but is actually in SharePoint (and optionally on local hard disk if Offline mode is selected). • SharePoint views created for the document library are visible in Outlook, even when offline. 	<ul style="list-style-type: none"> • Must run synchronization client add-in. • There is an effective limit of 2,000 items per view in SharePoint. Therefore, if you have more than this, you will have to organize these items into sub-folders.

Use Exchange Online Shared Mailbox

You can use the Shared Mailbox feature of Exchange Online to archive e-mail messages and discussion lists.

Note: A shared mailbox has the same size quota as other mailboxes in the system. Unlike public folders, the quota for the shared mailbox is not independently managed.

How to Do This

1. Set up an Exchange Online shared mailbox.
2. Archive e-mail messages and discussion list to the shared mailbox.

Benefits and Drawbacks

Benefits	Drawbacks
<ul style="list-style-type: none">• Users get the same UI experience as that of public folders. For example, standard e-mail functionality including reply and forward is built-in and does not require additional setup or configuration.• Message and attachment formats are preserved.	<ul style="list-style-type: none">• Someone with Exchange administration rights needs to create the shared mailbox.• The read versus unread UI behavior does not apply well to some of these usage cases. Because it is just a “shared mailbox”, once one user has read the message, it will appear as read to all users.

Document Sharing

Scenario Description

Exchange public folders are sometimes used to share documents, especially when these documents need to be taken offline. For example, it is convenient to be able to share datasheets and FAQs in a way that can be pushed to a salesperson’s laptop for use on the road.

Recommendations

SharePoint Online is excellent for document sharing and offline reading purposes, and can be connected to Outlook with very similar functionality.

How to Do This

1. Create a document library on a SharePoint Online site collection to house the documents.
2. You can use all the collaboration functionality of SharePoint in this document library. To distribute the documents for offline use, you can connect the library to Outlook or Microsoft Office Groove® 2007. When you synchronize with Outlook or Groove, you will automatically receive the most recent version of the document.

Note: For more information about how to edit SharePoint documents offline with Outlook 2007, see the blog <http://blogs.msdn.com/outlook/archive/2007/09/28/sharepoint-outlook-the-perfect-link.aspx>.

Note: If bidirectional synchronization is required, a synchronization client such as Office Groove 2007 or [Colligo Contributor](#) can be used.

Benefits and Drawbacks

Benefits	Drawbacks
<ul style="list-style-type: none">• Full use of the rich collaboration functionality of SharePoint (version history, approvals, check-out/check-in, workflow, and so on)	<ul style="list-style-type: none">• Edits made offline are not synchronized back to SharePoint unless a synchronization client such as Microsoft Office Groove 2007 or Colligo Contributor is used.

Manual Workflow

Scenario Description

Some public folders are used as a kind of “shared mailbox” to initiate a manual workflow. An example of this would be an e-mail box like info@contoso.com that customers can use to send mail to request product information. E-mail messages that come into this folder are reviewed by subject matter experts (SMEs), who either respond directly or store the e-mail messages elsewhere for further processing. Support alias is another example of this usage.

Recommendations

You can use the shared mailbox feature of Exchange Online to provide a single e-mail address for multiple people to use to initiate a manual workflow.

Automated Workflow

Scenario Description

Rarely, public folders are used to initiate an automated process. For example, an alias can be set up to parse scanned forms in e-mail attachments and automatically file them appropriately.

Recommendations

SharePoint Online can be used to create automated workflows based on input from forms. Some more sophisticated functionality can be replicated using Web services APIs in the Business Productivity Online Standard Suite. See the following section for detailed information.

Use SharePoint List Only

How to Do This

1. Create a list in SharePoint Online with a column for each metadata item that is required for the workflow.
2. Open the [SharePoint Designer](#) Web site and use Workflow Designer in SharePoint Designer to create a workflow that is triggered by changes to the items in the list.
3. To start the workflow, use the new item form in SharePoint.

Benefits and Drawbacks

Benefits	Drawbacks
<ul style="list-style-type: none">• Form can support data validation and help ensure workflow integrity.• Workflow can be applied to multiple SharePoint lists and integrated with other SharePoint-based processes.	<ul style="list-style-type: none">• Cannot use e-mail as an entry point.• Form validation is very basic until SharePoint Online supports browser-based InfoPath® forms. <p>Note: SharePoint Online currently does not support browser-based InfoPath forms.</p>

Use SharePoint List with InfoPath

How to Do This

1. Create an InfoPath form to collect the data required to start the workflow.
2. Create a form library in SharePoint Online based on this InfoPath form.
3. Open the [SharePoint Designer](#) Web site and use Workflow Designer in SharePoint Designer to create a workflow that is triggered by changes to the items in the list.
4. When users create a new item in this library, an InfoPath form will be loaded. Users then complete and submit the form so that the workflow associated with the form will start.

Benefits and Drawbacks

Benefits	Drawbacks
<ul style="list-style-type: none">• Because a form is used, input can be validated and the workflow will be more robust.• Workflow can span multiple SharePoint lists and can be integrated with other SharePoint-based processes.• InfoPath can be used to create rich form experiences that can be used online offline or online.	<ul style="list-style-type: none">• InfoPath must be installed on the client to use the form.

Custom Applications

Exchange public folders can also be used to develop custom applications. Depending on the scope of the application, you can use either Exchange Web services or SharePoint Online extensibility, or both.

For more information about SharePoint Online extensibility, download and review [Microsoft SharePoint Online Standard Developer Guide](#).

Free/Busy Lookups, OAB Distribution, and Outlook Security Settings

Exchange Server public folders can also be used to share free/busy information, distribute the offline address book (OAB), and set Outlook security settings for use with Outlook 2003 and earlier versions.

Exchange Server 2007 introduced Web-based services for free/busy lookups and OAB distribution, and Exchange Online uses this new method. Exchange Server 2007 supports Outlook security settings from the registry deployed through Group Policy. At the time of publishing this document, Exchange Online only supports versions of Outlook 2007 and earlier.

Note: Exchange Online does not support Outlook versions before Outlook 2007.

Note: During the migration, when some mailboxes of the organization are on-premises and some are in Exchange Online, on-premises users will not be able to see free/busy data for Exchange Online users and vice versa unless an Exchange server is deployed on-premises and configured appropriately.

E-Mail Delegates, Send As, and Shared Mailbox

E-mail delegates, Send As, and Shared mailbox are actually not public folder scenarios, but they frequently come up in public folder related discussions.

- **E-mail delegates:** Delegate access to your mailbox to another individual, or delegate access to particular data with particular privileges. For example, allow an administrative assistant to accept or create calendar appointments on behalf of a manager.
- **Send As:** Allow someone else to send mail from your mailbox. Your name will appear on the sent from line. For example, allow an administrator to send e-mail as a user (not on behalf of).
- **Shared mailbox:** Provide a group of people common access to a specific mailbox. For example, allow a single support alias to be monitored by multiple users.

Recommendations

All these scenarios, except Send As, can be accommodated in Exchange Online by using Outlook 2007 to add delegates and give permissions.

Note: You can have the Send As feature set up by filing a support escalation request.

How to Do This

By using Outlook, users can either share their Mailbox with other users – for example, by sharing a calendar with a Delegate, delegates can manage the calendar on behalf of another user. Granular permission can also be configured, such as Review or Full Editing permissions. Sharing of the Inbox, Tasks, and other Mailbox items is also supported.

Public Folder Content Migration

You should thoroughly consider both the gains and losses of Business Productivity Online Standard Suite for your public folder usage, and then decide whether to migrate public folders.

Migration from Publish Folders to SharePoint Online

Before moving existing public folder content to SharePoint Online, you need to well define your information architecture, consolidate and organize your data in public folders.

General Considerations

There are several things you need to consider before you migrate.

- SharePoint Online currently imposes a 20-site limit for site collections. A work around for this limitation is using subsites. Subsites in SharePoint can have different permissions from parent sites, and sites that cannot be accessed by a user will be trimmed from the navigation UI. The resulting experience would be one with a top-level site that all authenticated users could access, with tabs for each project that user is allowed to see. Permissions would have to be managed on a per-subsite basis.
- You should consider whether you want to keep the same public folder hierarchy, structure, or permissions, or whether you want to take this opportunity to re-organize your public folder information. Many customers have grown their information architecture organically and this is a good opportunity to restructure.
- Permissions migration cannot be fully automated for all cases. Manual steps may be required. Mapping on-premises to online ID may also have to be a manual step, in which a mapping file must be provided.

Manual Migration

You can migrate the public folder content manually through copy-and-paste operations.

1. Depending on the type of the content you want to move, create a list or document library on a SharePoint Online site collection.
2. Manually copy and paste the public folder content into the list or document library.
 - For non-document data, you can connect the list to Outlook, create a view in Outlook that contains all items, and then copy the content.
 - For document libraries, you need to copy the content from Outlook to a Windows Explorer view, which may involve a local copy first as described earlier depending on your operating system and configuration.
3. Re-create the permissions as appropriate.

Double-Hop Migration

You can use public folder migration tools and Web services-enabled migration tools separately to migrate the content in two phases. On-premises SharePoint is required to support such migration.

1. Use one of the public folder migration tools provided by Microsoft partners to move the content from public folders to on-premises SharePoint.
2. Use Web services-enabled migration tool to move content from on-premises SharePoint to SharePoint Online.
3. Manual steps may be required for permissions migration. Mapping on-premises to online ID may also have to be a manual step, in which a mapping file must be provided.

Note: Some Microsoft partners offer both tools for the double-hop migration so that you do not have to use tools from different partners.

Direct Migration

There are direct public folder migration tools provided by Microsoft partners (for example, Casahl and Metalogix). Therefore, you can also move content directly from Exchange public folders to SharePoint Online by using a direct public folder migration tool through Web services APIs.

Note: Many Microsoft partners are working on Web services-enabled versions of public folder migration tools to work directly against the service.

Permissions

The permissions can be either set manually or migrated automatically with the migration tools.

- If you migrate content manually, you will must re-create permissions manually too.
- If you migrate content in an automated way, permissions migration cannot be fully automated for all cases. Manual steps may be required. Mapping on-premises to online ID may also have to be a manual step, in which a mapping file must be provided.
Some Microsoft partners (for example, Metalogix) are working on better permissions migrations.

Migration from Public Folders to Shared Mailbox

You can also migrate public folder content to a shared mailbox in Exchange Online.

1. Export public folder data into a .PST file.
2. Set up a shared mailbox in Exchange Online, and then open the shared mailbox in Outlook.
3. Open the exported .PST file in Outlook.
4. Drag the desired data to the shared mailbox.