

Importing your mail from an Outlook file (*.pst) into O365

Scope: SO, CCC	Revision Date: 2/27/2019
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1. Introduction

Mailbox size used to be more limited to what it is today. As part of managing your mailbox or if keeping the size of your mailbox down, you may have exported mail out of your mailbox and stored it in an Outlook Data File (*.pst) that you would connect to when you needed to refer to it.

With the shift to using OneDrive for Business for file storage and now having larger mailbox sizes; you will need to make a decision on mail stored in any Outlook Data Files (*.pst) since they cannot be stored in your OneDrive for Business library.

The following procedure will walk you through importing the mail stored in Outlook Data Files into your O365 mailbox. Depending on how much mail you have and how large each Outlook Data File (*.pst) file is, will depend on how long the process will take. After you are done, it is important to verify the mail is now in your O365 mailbox and then to delete the Outlook Data Files (*.pst).

After your mail is imported, if using Outlook installed on a workstation, you will need to decide how much (1 month, 3 months, etc. up to all) of the mail in your O365 mailbox you will want to store locally. The more you choose to store locally, the more space you will need on your local hard drive. If you are accessing your mail from a browser, all your mail will be readily available in your O365 mailbox, no need to choose how much mail you want available.

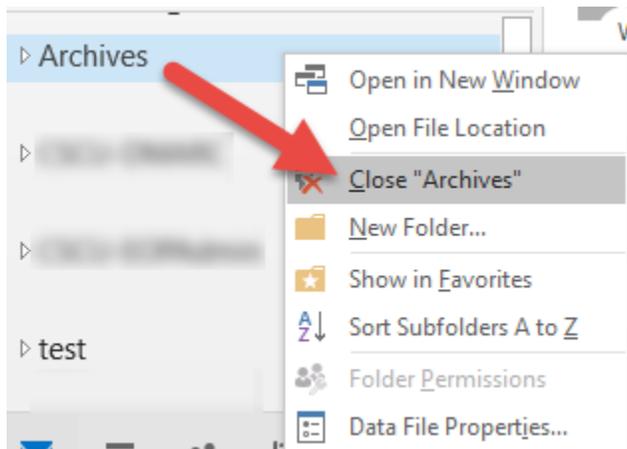
2. Importing mail from an Outlook Data file (*.pst) into O365

For each *.pst file you want to import (it could take hours to import each .pst depending on how big each file is), do the following.

NOTE: You probably don't want to be actively using Outlook at the time you are importing as Outlook may not be responsive. Plan for a time where you can start the import and not use Outlook. Instead, log onto the [O365 Portal](#) and read your email from there until the import finishes.

2.1. Open Outlook 2016

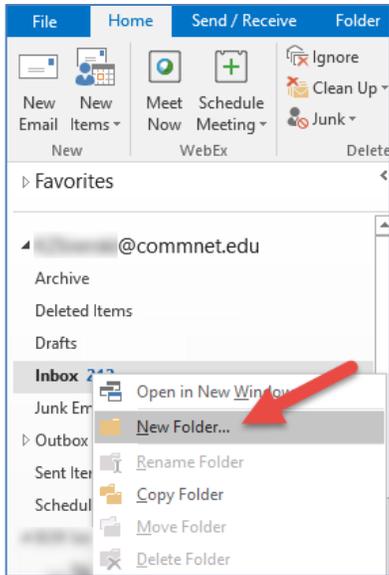
2.2. If you have your Outlook Data file (*.pst) files currently connected to your Outlook profile, you will need to disconnect from it before importing. Scroll down in the left menu, if the Outlook file is currently connected, right-click it and select Close "Name of archive":



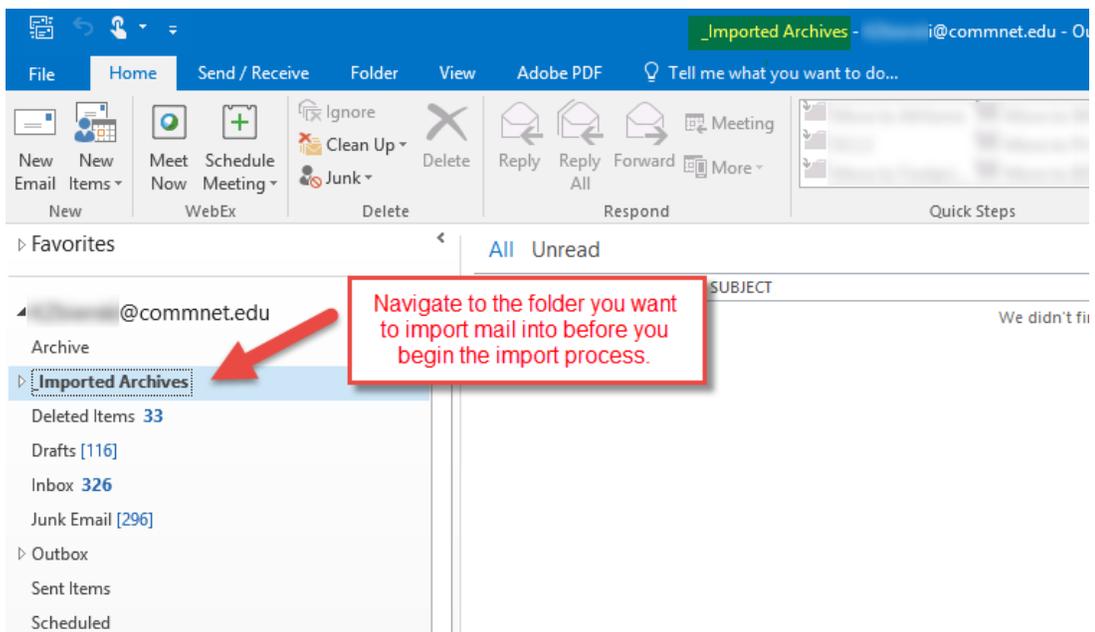
Then exit Outlook and reopen Outlook to ensure it is free from any connections to the Outlook Data File (*.pst)

2.3. Create a new folder where the email from the Outlook Data File (*.pst) will be imported into by right-clicking and selecting "New folder" where you wish to create it.

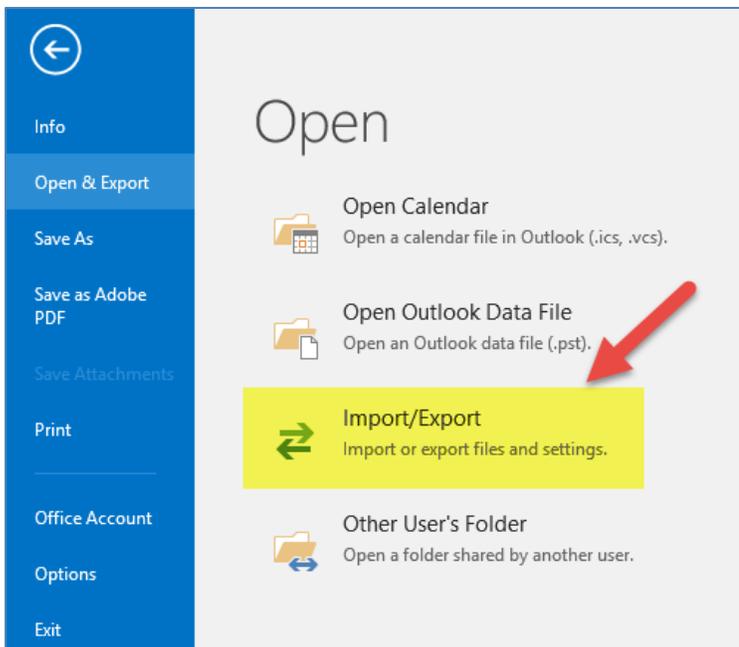
In this example, I'm creating a new folder inside inbox where I will import into:



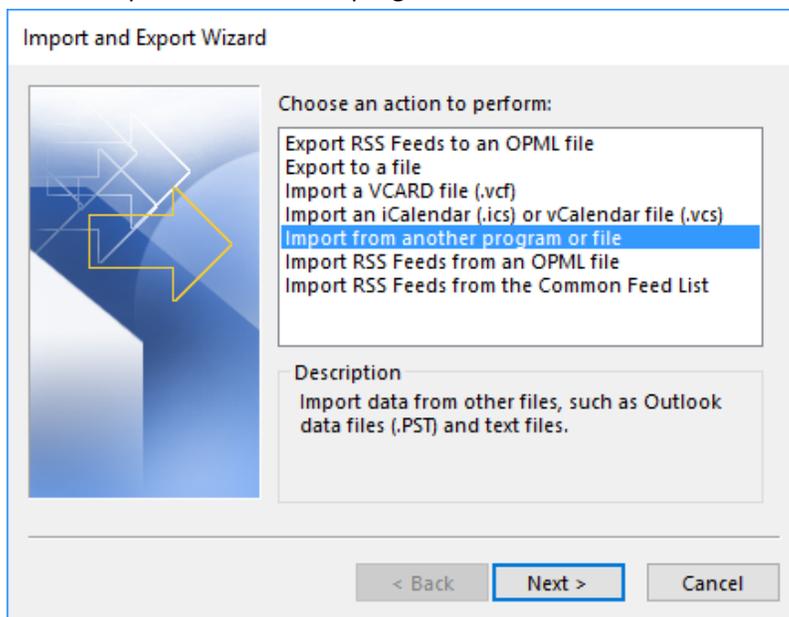
2.4. When you are ready to import the mail, navigate to that folder, so that when you begin the import process you will import into that folder:



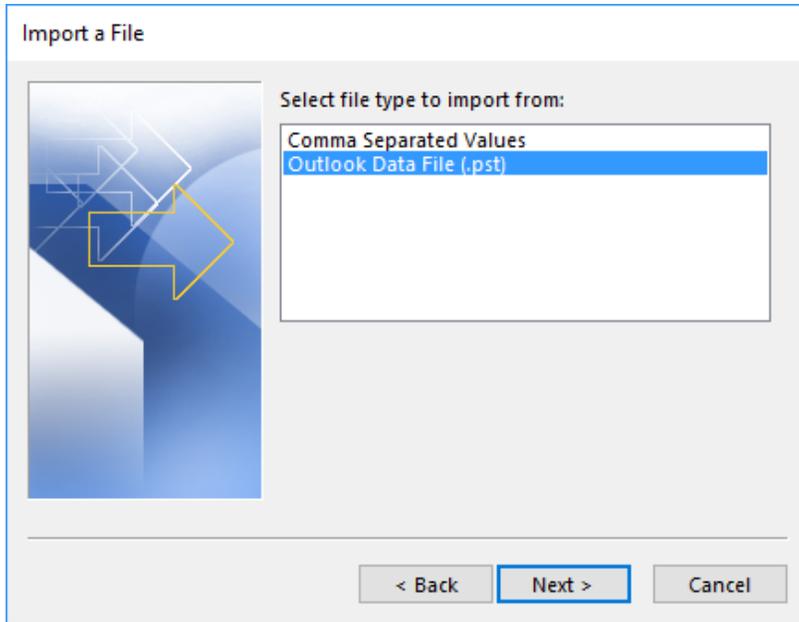
2.5. Select File – Open & Export, then select Import/Export:



2.6. Select "Import from another program or file" and click Next:

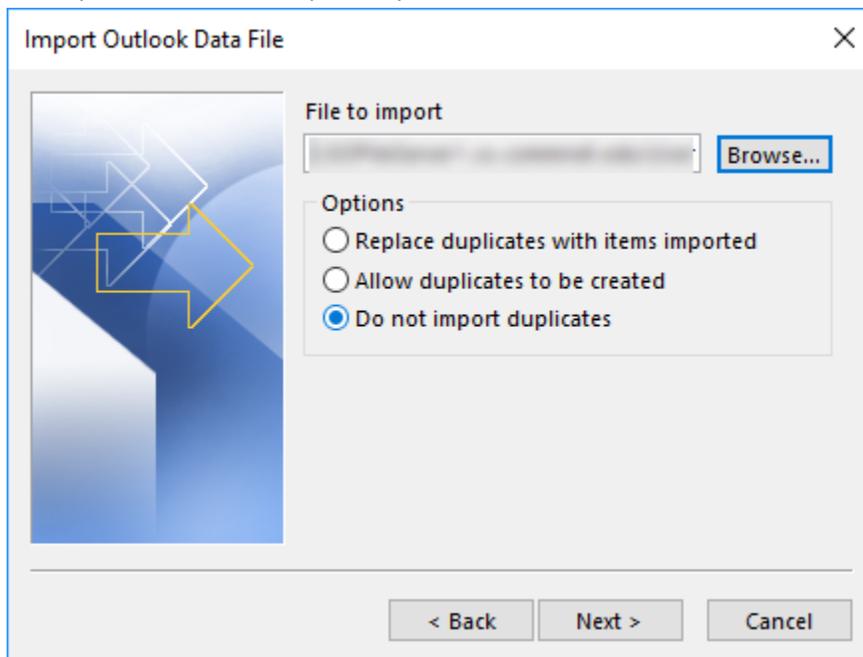


2.7. Then select "Outlook Data File (.pst)" and click Next:

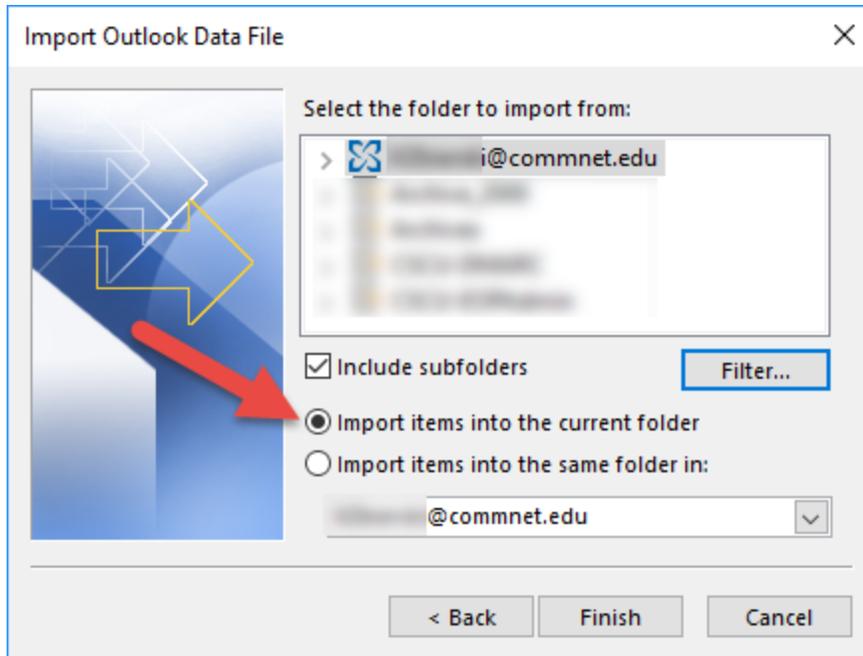


- 2.8. Browse to the folder where you will be importing the mail into (most likely the one you just created).

NOTE: If you are importing multiple Outlook Data Files (*.pst) – the last .pst you imported will be listed. Make sure you use the Browse button to browse for the next .pst file. Then change the option to “Do not import duplicates” and then click Next:



- 2.9. The next window is where you will be configuring what email is imported and where the mail is placed:



Select what you are importing from the Outlook Data file (*.pst)

Under “Select the folder to import from:”, you can select all the mail in the Outlook Data File (*.pst) by selecting your mailbox at the top or you can select just a sub folder and only mail in that subfolder will be imported. If you don’t wish to import mail found in the subfolders, make sure “Include subfolders” is not enabled.

Select where you want to put the mail being imported

On the bottom part of the window, we highly recommend importing the mail into a particular folder by selecting “Import items into the current folder”. NOTE: You will have had to already navigated to that folder before you started to import. If you did not navigate to the folder you want to impor into, click Cancel, navigate to that folder and start the import process again.

When you click Finish, your mail will now begin to be imported.

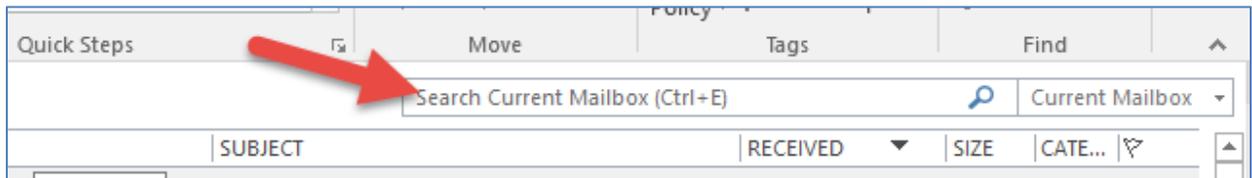
IMPORTANT: Once you have confirmed the mail is now located in your O365 mailbox using the search tips outlined in the next section, you need to delete the .pst file so it is not imported during any automatic process that locates Outlook Data Files and imports them into O365 mailboxes.

3. Searching and Outlook indexing

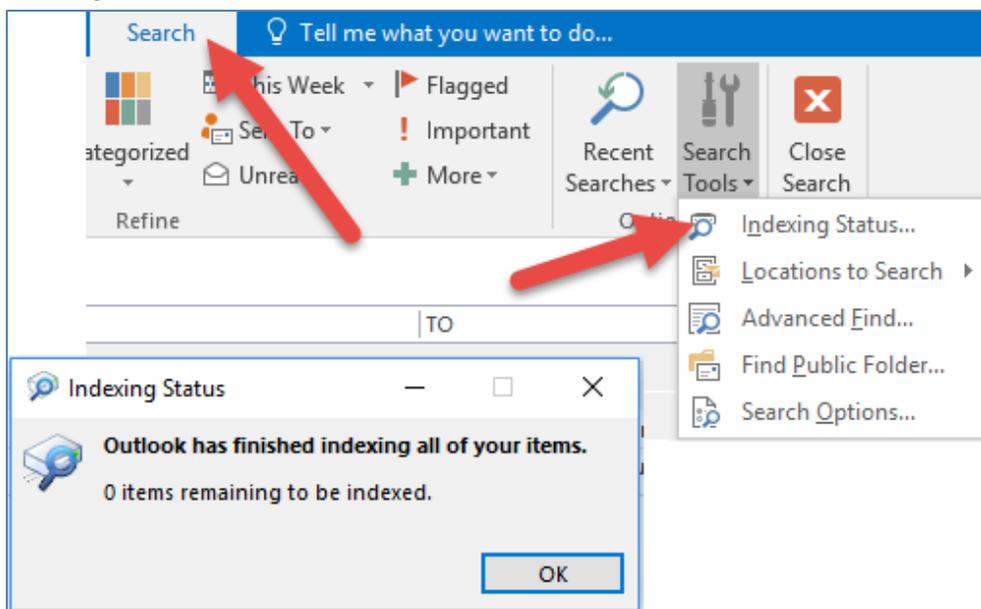
When you want to search for an item in your mailbox, the items you are searching need to first be indexed before they will show up in a search. If you have just imported mail into your O365 mailbox or adjusted how much mail you are storing locally, you will need to wait for them to be indexed or you may have to rebuild your index to include those items.

You can view/modify your search index and perform advanced searches from the Search ribbon that appears when you are using the Search feature. When you click into the search bar.

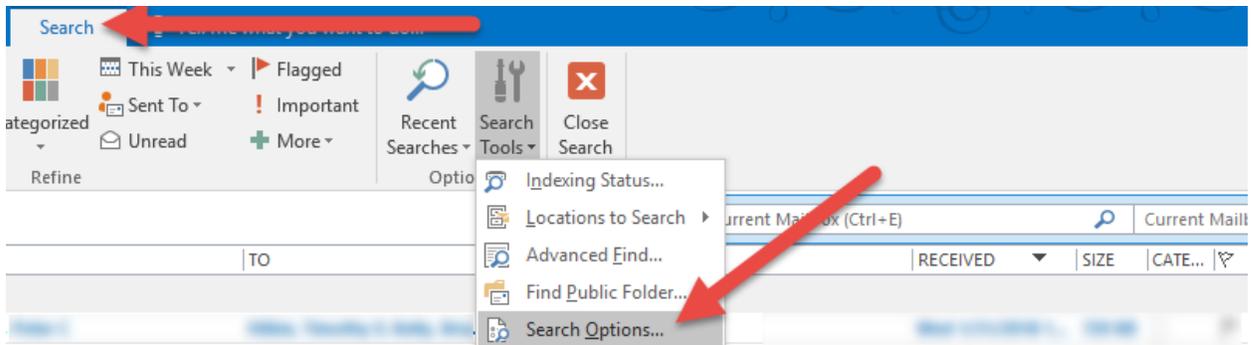
Remember to note what it is set to search. In this example, it is set to search the Current Mailbox. If you only want to search a folder, first navigate to the folder you want to search and remember to change "Current Mailbox" to "Current folder":



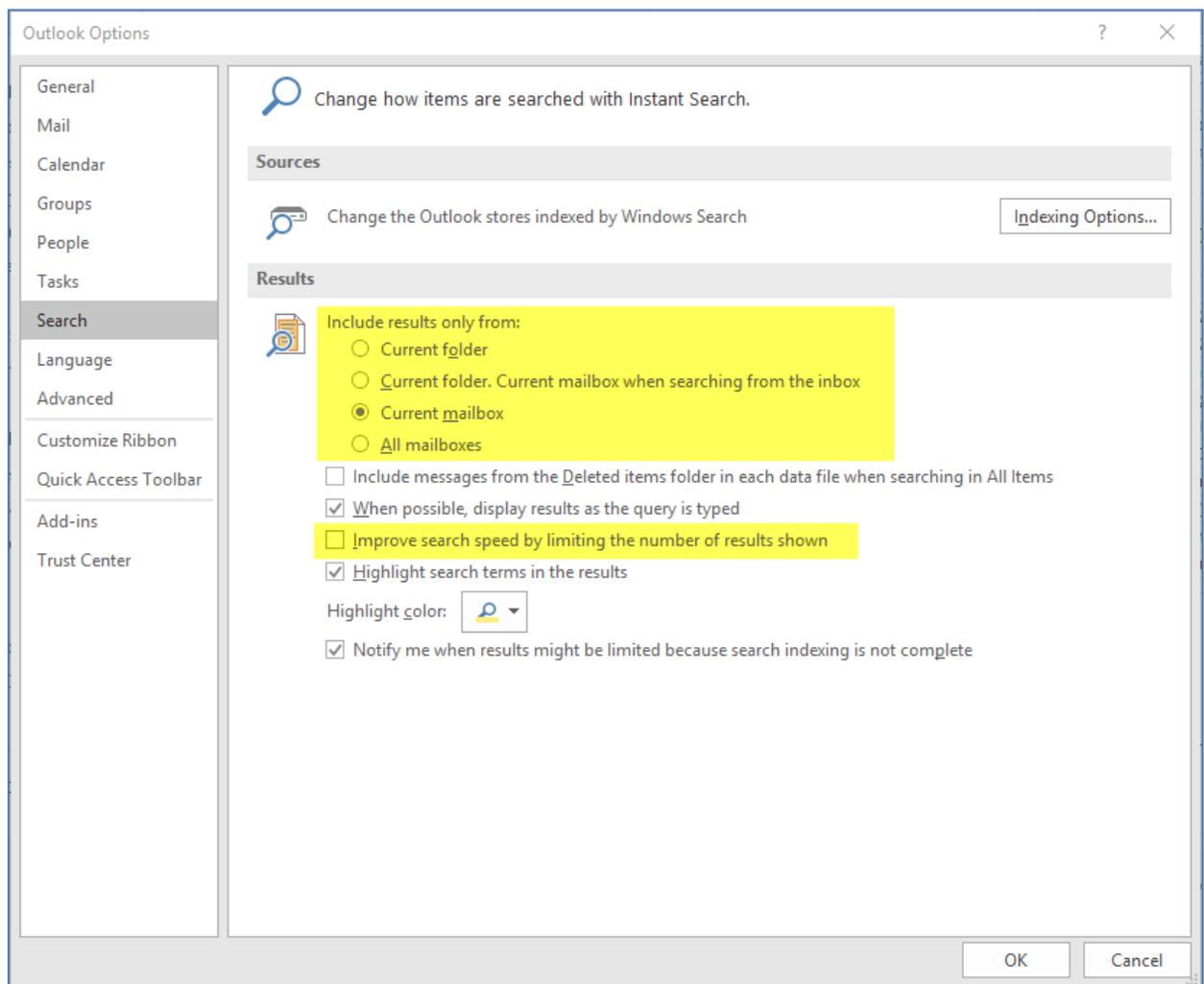
The Search ribbon appears. From the Search ribbon you can use the Search Tools to check your indexing status:



Or you can view or modify your Search Options:



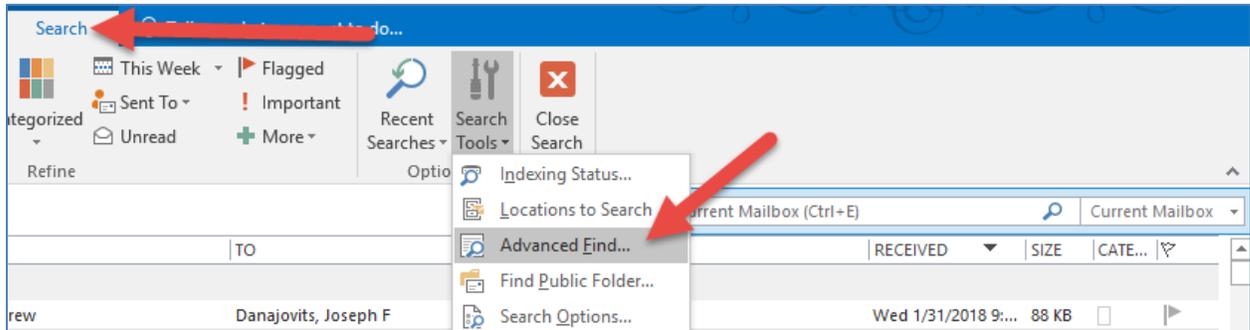
This launches the Search Options window (this window is also available from File – Options – Search) and you can change other search settings and indexing options, including rebuilding your search index:



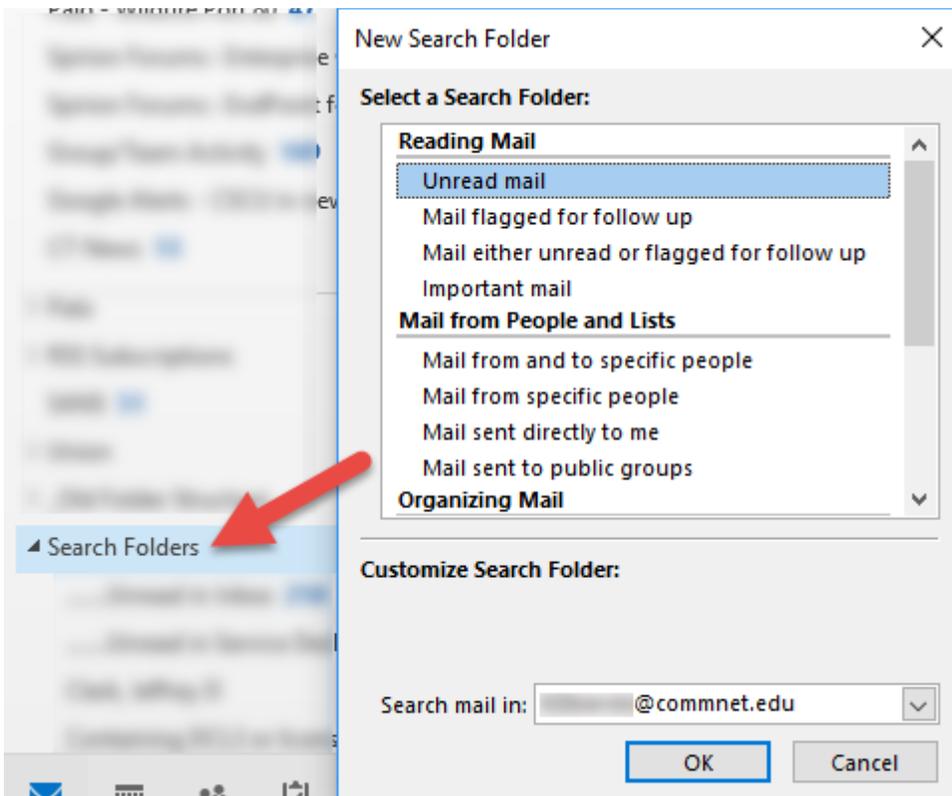
After your mail items are indexed, there are several ways you can search your mailbox. You can enter items into the search feature. There are many ways to narrow your search criteria. Refer to

this Microsoft document: <https://support.office.com/en-us/article/Learn-to-narrow-your-search-criteria-for-better-searches-in-Outlook-d824d1e9-a255-4c8a-8553-276fb895a8da>

You can also perform an Advanced Find from the Search ribbon – Search Tools – Advanced Find:



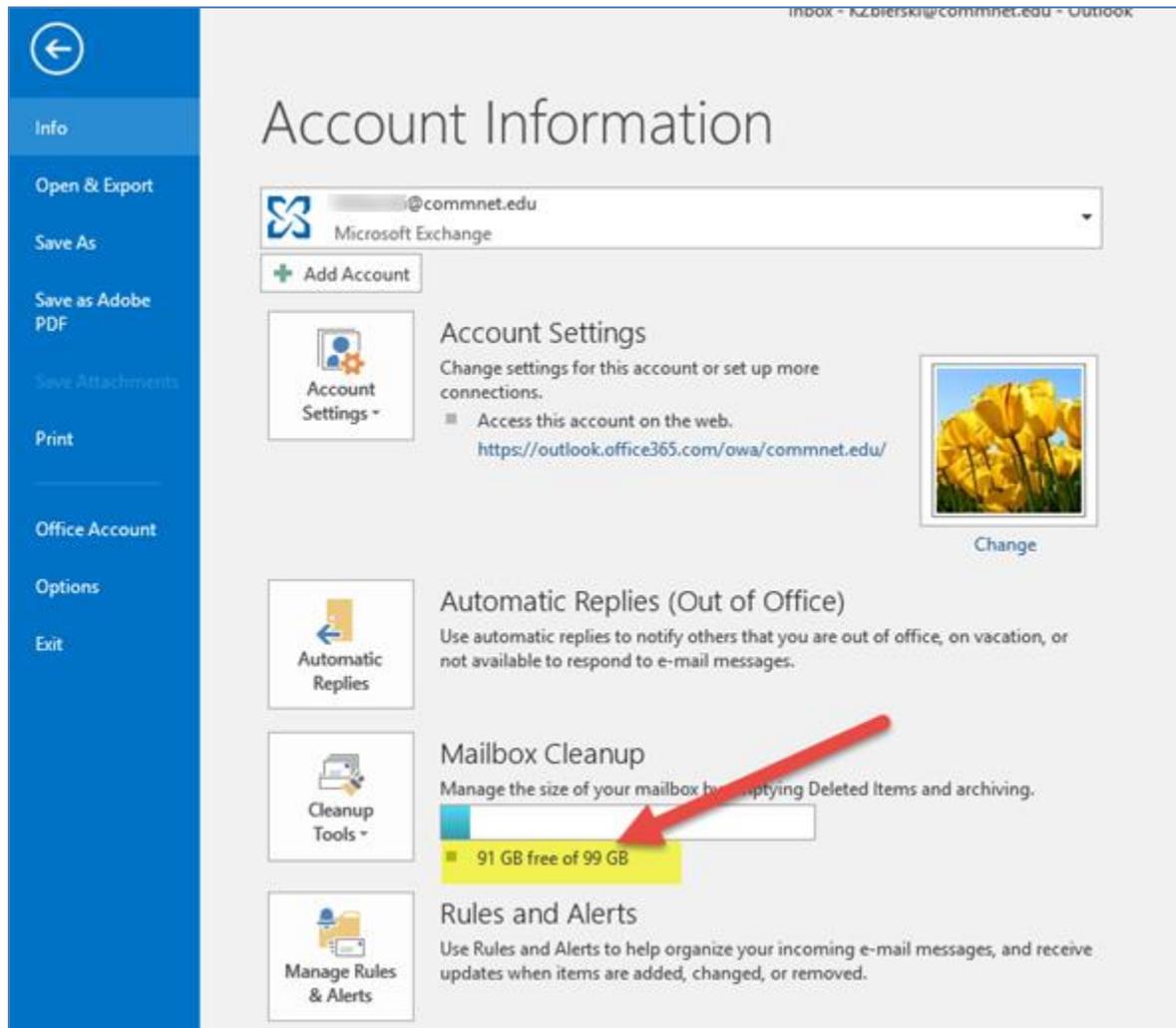
You also can create custom Search Folders. NOTE: Search Folders only search what is stored locally on your hard drive (that you configured in Section 4):



4. View the size of your O365 mailbox

After you have imported any Outlook Data Files (*.pst) into your mailbox, you will want to know the size of your O365 mailbox in O365 so you can adjust how much you keep locally on your workstation. This is how much of your 100 Gb mailbox you are currently using.

From Outlook 2016, click File:



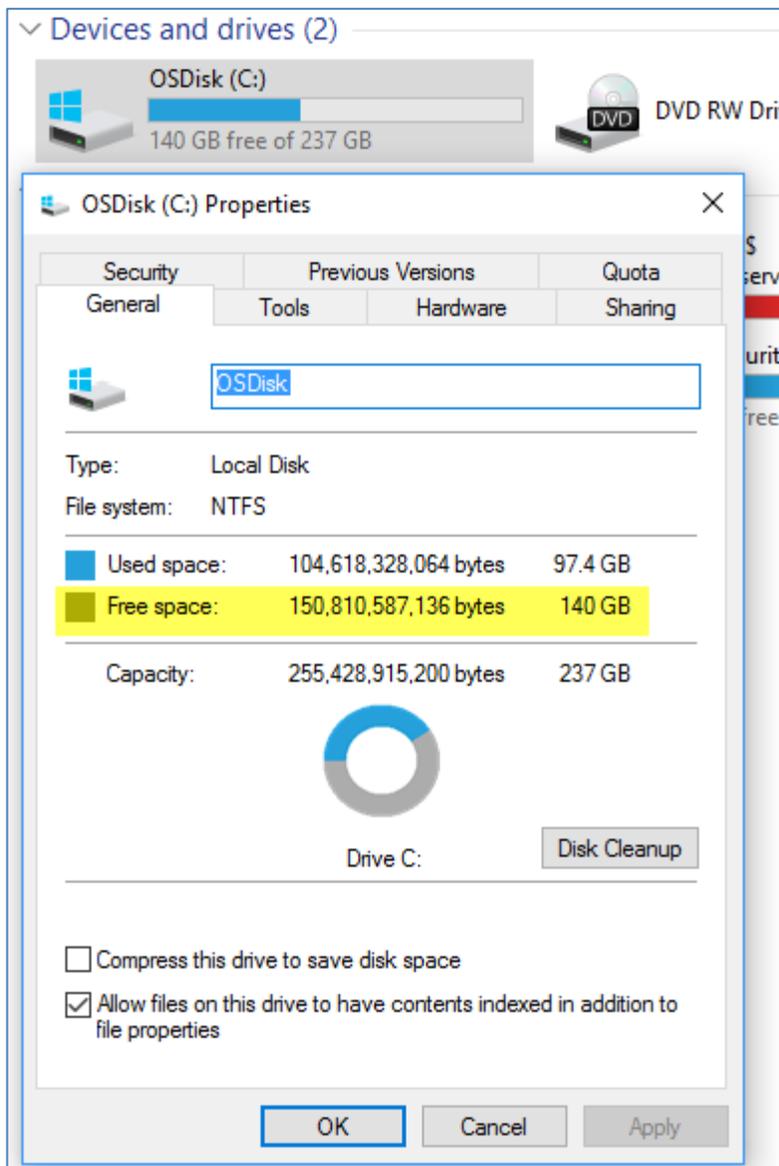
In this example, the O365 mailbox is about 9 Gb.

Use this information to decide how much you want to (and can, based on your hard drive space) keep locally on your hard drive.

5. Configure how much mail you want to store locally

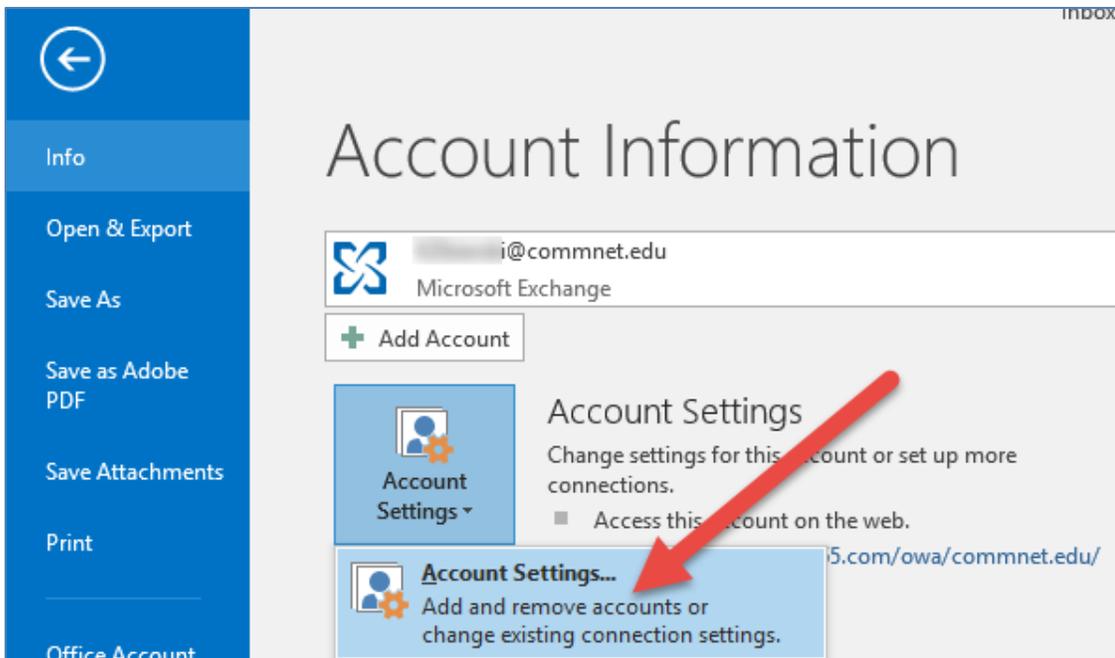
If using Outlook installed on your workstation and allowed by your workstation policies, you may be able to configure how much mail you want available locally from your workstation. You'll first want to check the size you have available on your local hard drive. You can configure it to store as little as 3 days of mail to as much as your entire mailbox locally on your workstation. You should have enough free space available on your local hard drive to accommodate for future mail as well.

5.1. Use the File Browser to view how much free space you have on your hard drive. Right click on your hard drive and click Properties:

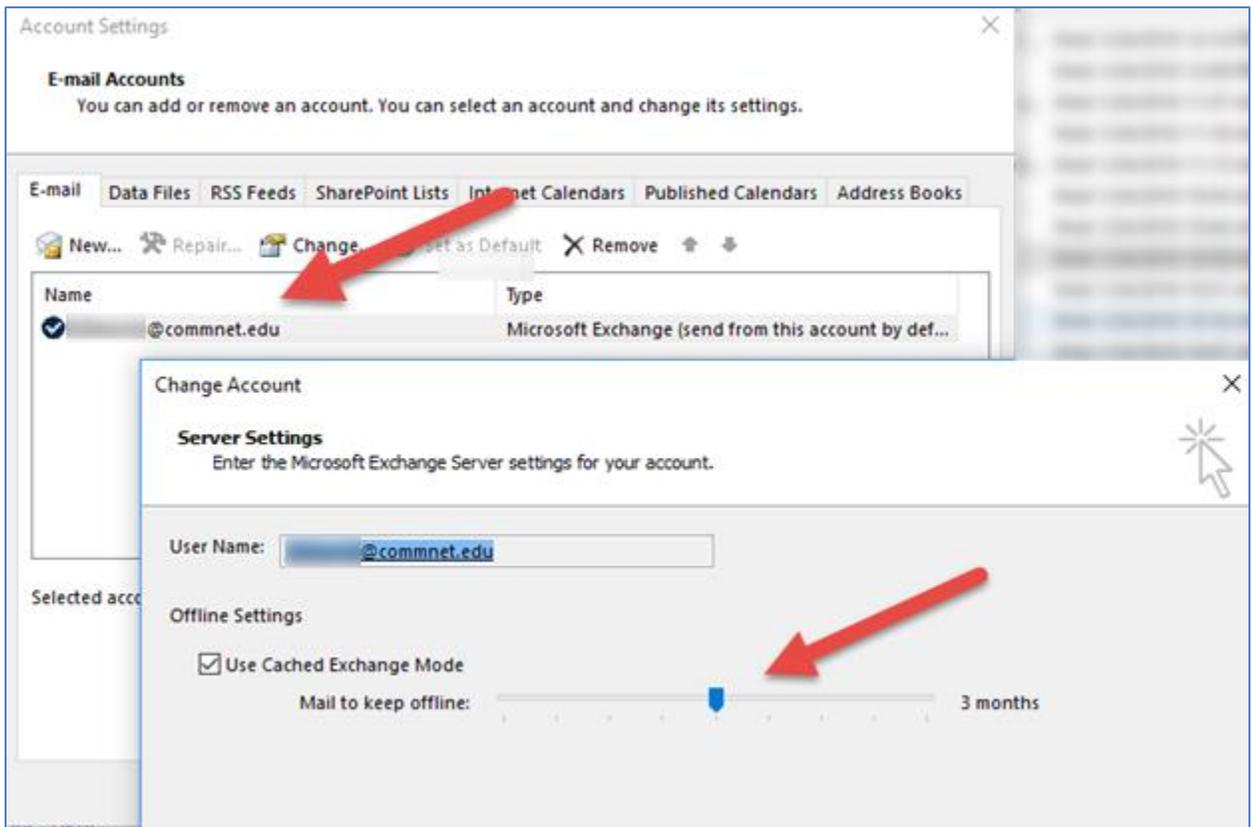


In this example, this hard drive has 140 Gb of space available which is plenty of room to store all or some of the 9 Gb O365 mailbox shown in section 3.

5.2. From Outlook 2016, click File – Account Settings, Account Settings...



Then change to the E-mail tab and double click your account to see a slider that will determine how much mail is stored locally on your workstation:



Mail is stored on your workstation in this location:

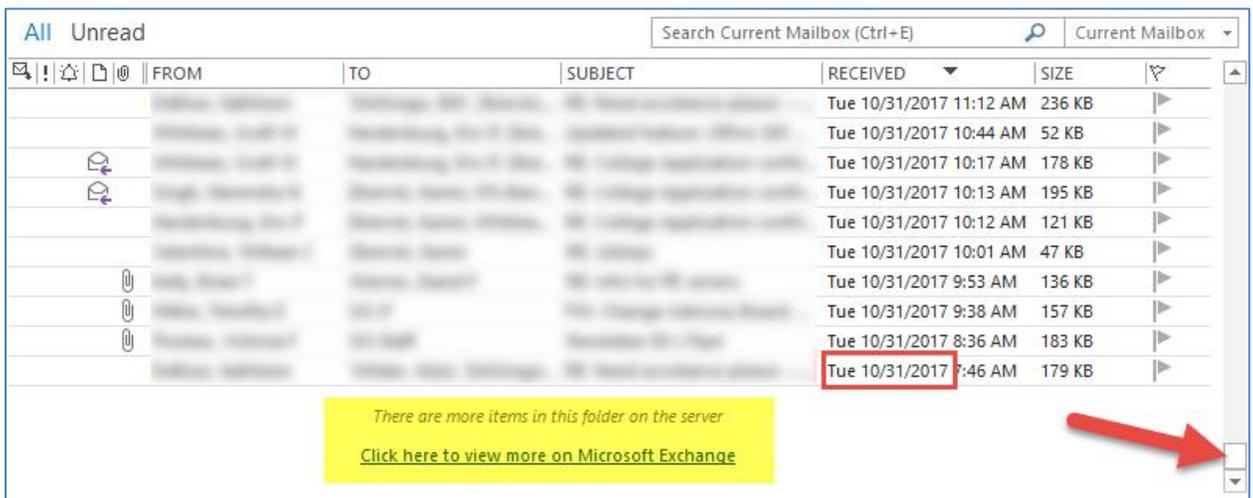
C:\Users\\AppData\Local\Microsoft\Outlook

The filename will be your account name followed by .ost

It will take some time to change the mail that is stored locally, it is not instantaneous. If you put the slider all the way to the right at “all” – your .ost file will be about the size of your O365 mailbox (shown in section 3)

We recommend only storing locally what you typically refer back to. Searching mail that is not stored locally (i.e. is beyond what you have the slider set to – for example if you are only storing 3 months and you are looking for an item from a year ago) can be done using the “Search Current Mailbox” feature described next.

To verify what is available locally on your workstation, from your inbox, use the right scroll bar to scroll all the way to the bottom. If you have more mail stored in O365 than on your workstation you will see the following message with a link to load the mail that is not stored locally:



In the example above, the slider was set to keep 3 months of mail and the last item before the message was 3 months ago.

You will need to click “Click here to view more on Microsoft Exchange” to view mail that is stored in your O365 mailbox but not locally on your workstation.