

Sub-Project Plan



Project Details

Project Name: Communication and Collaboration: Email Migration
Project Team Leads: Ryan Lenger, Scott Fuller
Project Manager: Isaac Podolefsky
TeamDynamix Project Number: 241101

Project Overview

This sub-project focuses on the migration of 18,859 (10,059 faculty/staff, 5,300 students, 3500 shared) accounts from the current Hawkmail infrastructure to Office 365 within an aggressive timeframe of completion by 1/1/2016.

Project Staffing

Executive Sponsorship

To successfully complete this migration it will require partnership of dozens of staff across nearly every University of Iowa department. Commitment to this goal from the following groups is crucial:

- OneIT Steering Committee (Total 10 hours)
- ITS Leadership Team (Total 10 hours)

Core Project Team

This group of staff will be mostly dedicated to this project for the duration which we estimate at 6-8 months:

- Ryan Lenger – Project Lead (500 hours)
- Scott Fuller – Project Lead (300 hours)
- Isaac Podolefsky – Project Manager (300 hours)
- Deb Yoder – Service Management and User Support (500 hours)
- Teresa Rose – Service Management and User Support (500 hours)
- Steve Yagla – Service Management and User Support (500 hours)
- Lisa Schintler – Service Management and User Support (500 hours)
- Matt Kaufman – Microsoft Exchange/Office 365 Administration (500 hours)
- Craig Wilkinson – Microsoft Exchange/Office 365 Administration (500 hours)
- Mary Grabe – User Training (200 hours)
- ITS Extended Tech Support – Onsite User Support (varying staff on rotating basis, 500 hours)
- ITS Help Desk – User Support (varying staff on rotating basis, 500 hours)

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Extended Project Team

This group of staff are involved for periodic work throughout the project:

- Daniel Worrell – Directory and Authentication Development (100 hours)
- Dan Metzler – Directory and Authentication Administration (100 hours)
- Jordan O’Konek – Directory and Authentication Administration (100 hours)
- Michael Domingues – Directory and Authentication Administration (100 hours)
- Doug Brenner – Email Routing and Anti-Spam Administration (50 hours)
- Jo Josephson – Email/Unified Messaging User Support and Administration (50 hours)
- Adrienne Klopfenstein – Marketing and Web Presence (100 hours)
- Nicole Riehl – Public Relations (50 hours)
- Jalessa Hall – Graphic Design (30 hours)

Local Migration Partners

These teams will be comprised of local IT in the units, departments and colleges. The Core and Extended project teams will partner with each of these groups to make the transition as seamless as possible by leveraging the strong relationships and unit knowledge already present. The Local Migration Partners will be involved only for the department or college they represent to help with migration planning, completion and support. We estimate this involvement at three weeks:

- Example for Tippie College of Business
- Jim Chaffee – Unit Migration Partner (10 hours)
- Scott Fuller – Unit Migration Partner (10 hours)
- Brian Heil – Unit Migration Partner (10 hours)
- Darrin Thompson – Primary Unit Migration Partner (50 hours)
- Nguyen, Huynh – Unit Migration Partner (10 hours)

Project Schedule

Campus Migration Timeline:

- Goal to complete user and shared mailbox migrations by 1/1/2016 due to end of Forefront Exchange Antivirus Protection and end of life hardware infrastructure.
- Migrate by unit/college, starting with smaller migrations to validate processes. *Mailbox counts for each unit available in Appendix A.*
- Sequencing of units/colleges depends on several factors such as staff availability and demographic. For instance, it may be a better alternative to migrate a college during the semester when more staff are physically present.
- Delays will result in large migrations at the end of the calendar year. Goal to migrate an average of 750 accounts per week for 20 weeks, excluding the month of August and the last two weeks of the semester.

Individual Unit/College Migration Timeline:

- (T - 21 days) Meet with local IT support group to discuss migration.
- (T - 21 days) ITS will provide list of current users, shared email accounts and Exchange resources. Local IT staff will review for accuracy.
- (T - 18 days) Confirm migration date and user list (individual, shared, resources) with the unit/college IT staff.

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- (T – 17 days) Notify ITS Help Desk of migration date.
- (T - 17 days) Save the date email will be sent to all users with the planned migration date and training opportunities. *Example in Appendix E.*
- (T - 17 days) Automated email will be sent to Shared Email Account owners notifying of migration and to verify accuracy and necessity of the account. *Example message available in Appendix C.*
- (T – 16 days) Portion of local IT support staff migrated to Office 365 to gain user and support experience.
- (T - 15 days) Postcard will be sent to all users with the planned migration date. Posters displayed in departments. *Example available in Appendix D.*
- (T - 14 days) Meeting with O365 Support Hot Team (ITS and Local IT) to review migration date, common support issues and logistics. Identify VIP users who may need additional support during migration.
- (T - 10 days) Open training and user question session.
- (T - 5 days) Final email reminder to users about email migration. *Example in Appendix B.*
- (T – 4 days) Begin mailbox data copy from Hawkmail to Office 365.
- (Migration Date [T]) Finalize mailbox migration. O365 Support Hot Team ready to help users with computer and smartphone reconfiguration and troubleshooting. Support staff embedded at ITS Help Desk to help with quicker resolution.
- (T + 3 days) Survey sent to completed users asking for feedback about the migration and any continued support issues.

Project Budget

Staffing Operational Costs

- (\$460,000) Primary cost is committed staff time for the next six months (staffing listed above). This money represents the staff effort involved in the transition. No additional staff are being requested.

Requested Funds

- (\$2,000) Purchasing communication and marketing materials (postcards, posters, t-shirts)
- (\$13,500) Opportunities to add dedicated student support in the ITS Help Desk to eliminate bottlenecks to be determined based on initial migration results. Three additional students working 20 hours/week for six months at \$9.00/hour. This funding is not required up front, but is a potential solution if the ITS Help Desk receives and overwhelming quantity of support requests.

Change Control Plan

Small adjustments to the Unit/College migration plan will be handled by the Office 365 Core Project Team.

Substantial changes to project scope or timeline will be brought to the OneIT Steering Committee for evaluation and resolution.

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Communications Plan

Target Audience	Primary Contact	Communication Mechanism	Frequency	Purpose/Description of Communication	Author/Owner
OneIT Steering Committee	Program Office	Email, meeting discussion	Monthly, ad hoc as needed	Updates on project, feedback	Ryan Lenger, Scott Fuller
Project Team	Ryan Lenger	Email, meeting discussion, SharePoint	Weekly, ad hoc as needed	Planning, scheduling, meeting with local IT units, resolving	Ryan Lenger, Scott Fuller
OneIT Leaders	Chris Clark	Email, Meeting discussion	Ad hoc as needed	Updates on project, feedback	Ryan Lenger, Scott Fuller
ITS Leadership Team	Mike Frangi	Email, meeting discussion	Ad hoc as needed	Updates on project, feedback	Ryan Lenger, Scott Fuller
ITAdmin Community	Jessica Church	Email, meeting presentations and discussion	Monthly, ad hoc as needed	Updates on project, feedback	Ryan Lenger, Scott Fuller
Public PR	Nicole Riehl	IowaNow, Daily Iowan, Social Media, ITS Website News	Ad hoc as needed	Wide announcements	Nicole Riehl, Ryan Lenger, Scott Fuller
Direct User Communication	Ryan Lenger	Email, ITS Website, postcards, posters	Quarterly, ad hoc as needed	Planning, scheduling, support	Office 365 Project Team
Primary Support Website	Ryan Lenger	ITS Website (http://its.uiowa.edu/office365)	Daily	Central location for all support and announcements	Office 365 Project Team

The primary support website (<http://its.uiowa.edu/office365>) is the anchor point for information about this project. The goal is to create emails, postcards, websites and other communication mediums which refer back to this website. This allows the support and marketing messages on the site to change over time as appropriate.

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Risk Management Plan

Risk Number	Risk Description	Likelihood (H,M,L)	Impact (H,M,L)	Mitigation Strategy
1	Not moving accounts prior to 1/1/2016 is security concern	H	H	<p>Purchase third party security tools or lock down email system to reduce exposure</p> <p>Sophos product is part of an existing license so capital cost is zero. The opportunity cost of staff effort is the issue and would slow progress on Office 365 migrations.</p> <p>Staff would need to be pulled from Office 365 migration efforts to install and configure no later than Nov. 15, 2015. Sophos installation won't solve Exchange hardware issues due to age.</p>
2	Exchange hardware failure	H	H	<p>Primary strategy is to migrate users mailboxes to Office 365.</p> <p>Secondary strategy is to purchase out-of-warranty part replacement for servers. Hardware is five years old and parts may not be available.</p>
3	Data loss	M	H	<p>Data is not lost in the migration to Office 365 because it is copied. Would revert to on-premise Exchange data if necessary.</p> <p>Larger data loss risk is data residing with on-premise Exchange servers. This hardware is old and becoming unreliable.</p>
4	Resistance to migration	M	H	<p>Existing on-premise Exchange hardware is aging and becoming unreliable. Migrating to Office 365 or replacing the existing Exchange system are the two options. Remaining on the old hardware is the least reliable situation.</p>
5	Insufficient staff support availability	M	M	<p>The email migration can be completed without the staffing plan listed above, but user satisfaction and support would suffer.</p> <p>Partnership between ITS and local IT staff is the best option to the migrations in a timely and minimally disruptive manner.</p>
6	Calendar free/busy not working between Hawkmail and Office 365 users.	H	M	<p>This issue affects users who remain on Hawkmail as others move to Office 365. This is temporary and the solution is to migrate all users to Office 365.</p>
7	Healthcare accounts not synced to Office 365	H	M	<p>Email continues to function, but accounts are not easily found in Global Address List. It is possible to email these accounts by typing the proper email address. An active parallel project is working to sync Healthcare accounts to Office 365.</p>

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Issue Tracking and Resolution Plan

Issues will be directed through the ITS Help Desk for tracking, support and escalation. The Office 365 migration project group will have final responsibility to resolve issues.

Tracking for Unit/College migrations will be done by ITS support staff using SharePoint task lists available to the group. Each Unit/College migration will have an ITS point person working in partnership with a Unit/College point person to coordinate these efforts.

Project Plan Approval Date: 7/7/2015

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Appendix A (Units with mailbox counts):

Unit / College	Count of Individual Faculty/Staff Mailboxes
ITS	267
Business	360
VPR	403
University College	47
Law	229
Library	190
Education	318
VPSC	56
GraduateCollege	97
ContEd	64
Pharmacy	242
Finance and Operations	1247
Engineering	353
CLAS	1584
CLAS Independent	259
SSer	550
President	81
Provost	434
CCOM	3
CON	190
Public Health	534
Dentistry	630
Total:	10059

Total Remaining Students:	5300
Total Resources and Shared Mailboxes:	3500

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Appendix B (Final email reminder to users):

Dear **?xx?** staff,

We are planning to migrate your Hawkmail account to Office 365 on **?date? beginning at ?time?**. You can continue to work while your mailbox is being moved. When the move completes you will be presented with a message asking you to restart Outlook (wait about 1 minute after shutting down to restart Outlook).

We will also be migrating the following shared departmental account(s): **?account, alias, display name?** If you check multiple exchange accounts, you will be prompted to restart Outlook for each account. Your personal account may get migrated before a shared departmental account. If you can't access the shared account right away, try again later to see if you can then.

If you have Unified Messaging you will not have access to Unified Messaging during the migration. You will receive a new "Welcome to Unified Messaging" message, [be sure to follow the steps in that message.](#)

Issues you may run into after migrating your Hawkmail account to Office 365 You cannot share details of your Office 365 calendar with Hawkmail users – they will only be able to see your Free/Busy information.

Accessing your Office 365 account via the web: <https://office365.uiowa.edu> – Once you log in and select Outlook, you will be prompted to set your time zone. Select the **Current time zone** dropdown and select **(UTC-6:00) Central Time (US & Canada) | Save**

Configuring Email Client after you are migrated - Note: when entering your HawkID, use the format Hawkid@uiowa.edu

Configuring Mobile Devices For Office 365 after you are migrated - Note: when entering your HawkID, use the format Hawkid@uiowa.edu

Managing an Office 365 Shared Departmental Account

Managing a Hawkmail Shared Departmental Account for Student Employees and Staff On Office 365

Office 365 documentation and configuration instructions can be found on the [Office 365 support center](#).

If you have any questions, please contact the ITS Help Desk at 384-HELP or its-helpdesk@uiowa.edu.

Thank you.

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Appendix C (Shared Email Account owner notification):

Hawkmail accounts for ITS are scheduled to migrate to Office 365 beginning [DateTime].

Your HawkID (IOWA\yoder) has been identified as the owner of the following departmental accounts or resources:

Account ID	Email Address
eudie	its-email@uiowa.edu
RES-UCC2800-Test	RES-UCC2800-Test@iowa.uiowa.edu

These accounts will be migrated along with your regular Hawkmail user mailbox. You may wish to opt out of migrating one or all of your special accounts if:

- the account was issued to you but is not associated with your current department
- the account is a service account which would require reconfiguration to work with Office 365

To opt out of migrating a special account to Office 365, please respond to this email with the IDs to be excluded by [DateTime].

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[AdditionalContactInformation]

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Appendix D (Postcard):



**YOUR UIOWA EMAIL
UPGRADE
IS COMING SOON!**

 **Office 365**

-  Larger email quota (50 GB)
-  Download & install up to 5 copies of Microsoft Office for FREE
-  Online Microsoft Office Apps for easier collaboration
-  Cloud file storage (1TB)

Login at office365.uiowa.edu

FOR SUPPORT & ADDITIONAL INFORMATION VISIT [ITS.UIOWA.EDU/OFFICE365](https://its.uiowa.edu/office365)

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Appendix E (Save the date message):

Dear ?xx? staff,

Email services for faculty and staff will be transitioning to the Microsoft Office 365 system during the latter half of 2015. These efforts are part of on-going upgrades to provide University of Iowa faculty, staff and students with modern and reliable technology. This email upgrade will include migration of all existing email data to the new system where each person will receive a 50 GB email quota (compared to 1 GB today). In addition, the Office 365 system includes web access to the Office Suite (Excel, Word, PowerPoint and OneNote) and new collaboration and sharing tools for documents. Office 365 also integrates seamlessly to provide instant messaging, video conferencing and online meetings.

Reliability, security and access from anywhere are a few of the top requirements for this upgrade. Desktop computer users will continue to use Microsoft Office applications. Office 365 provides new opportunities, but also embraces the familiar Outlook, Word, Excel, PowerPoint and OneNote applications. Office 365 is compatible with smartphones and mobile devices as well as accessible via modern web browsers. As part of this change the UI worked with several other institutions to negotiate strong contractual agreements with Microsoft, including a Business Associates Agreement that covers HIPAA data.

Moving email to the cloud is a major trend in both higher education and corporate business as companies such as Google and Microsoft are now offering high-quality email services to universities. Microsoft has over 20 million users of their cloud services in education alone, and several other schools, such as Nebraska, Duke, and Ohio State have moved or are in the process of moving to 365. In fact, UI students have been using the new email system for nearly two years and this is an opportunity to unify all faculty, staff and students into the same modern user experience.

Expect more information from ITS and your local IT support staff in the coming weeks. You will be notified prior to any changes with your email account.

Thank you,

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