Montgomery County

Office 365 - Office 2016 G3 transition plan

Introduction

With the decision to provide the Office 365 2016 G3 to all staff 'seat' machines, a program and process has been developed to drive the deployment. In order to complete this 'Quickly with Quality' the following approach described in this plan will be used.

This document describes that approach and process that DTS will undertake to migrate users to G3.

In general, DTS intends migrate small numbers of users within a Department rather than migrate an entire Department at once. This approach will allow DTS to identify challenges and develop solutions. DTS must balance the speed of transition with the availability of IT help desk and onsite support personnel to remediate issues.

General Transition strategy

The transition to G3 will be a scheduled process where various groups of staff within a department are transitioned in what is referred to as a Batch. It may take a number of Batches to transition all staff from a given department.

Unlike the Outlook migration when whole departments where moved during a given migration event, staff will be transitioned in groups such as all Office 2003, all Office 2007, etc. so it may take additional time.

One of the concerns for the large number of staff who are currently using Office 2003, 2007 and 2010, is what types of failure may occur based on a given configuration type. For example, there is a large concern over impact to staff who did not migrate their PST files during the Outlook migration.

By performing the analysis of the various configurations (referred to as **Cross Sectional Testing**), we should have a good idea of what to expect before migrating larger groups of a particular configuration and will build the Batches accordingly.

Batch Processing approach

DTS will begin with Weekend batches. Over time and for specific reasons additional midweek batches may be added. These batches will consist of multiple departments transitioning in various categories of staff to include:

- General Office 2016 G3 upgrade
- **Cross Sectional Testing** G3 upgrade
- **Special Items** - Replacement of 2010

All machines included in the Batch **will have all previous copies of Office and related elements removed**. The only exception are the viewers. Those will be removed at a later time without requiring any special staff involvement.

Applications such as **Visio and MS Project will not be removed**, however staff who have current versions of those standalone applications will need to move to the Office 365 versions otherwise each time the open a file or launch the application it will re-install itself first.

Although **Cross Sectional Testing** and **Special Items** are likely to be in each Batch, the largest batches of staff being moved will be scheduled for transition up to two weeks before it will occur so that they can move PST files and otherwise prepare if needed.

Batch Handling

There is currently one weekend Batch per week. For scheduling purposes, it is recommended that systems / staff being transition should be be scheduled at least two weeks in advance.

For a Weekend Batch

- The Batch is locked at noon on the Thursday prior to transition
- It is reviewed on the Friday for Sunday execution.

All Batches are communicated to the IT help desk, the DTS support team and Department IT contacts in preparation for issue resolution.

Reports of Batch processing activity will be available mid-morning on the Monday after the transition and will be sent to the stakeholders and will be coordinated by José Laguna (DTS) and Alphonse Mbulle (IT help desk) for the staging and remediation.

General Schedule

A formal schedule will be managed and shared to track progress. However, in general the approach is to address the following groups in the order described below:

- Office 2003 only and Office 2003 plus 2016 in all departments
- Office 2007, 2010
- Office 2016 (with no issues)
- Office 2013 G3 (existing G3's)
- Smaller departments where DTS provides IT support services

Who Gets G3?

The focus of this upgrade to G3 is very specific:

'Seat' machines with dedicated staff using them that have not already been upgraded to G3.

Other machines in training facilities etc. are not covered. Some Departments have chosen to repurpose their Office 2010 licenses liberated during the upgrade process and to use them for any machine not covered by this upgrade. **Do not use 2007.**

Cross Section Testing

A key way of ensuring we can move forward Quickly with Quality is to run cross sectional test Batches. We are looking for a cross section of machines in Department's for our test runs.

This includes:

- Machines with each generation of Office software in use (2003, 2007, 2010, 2013)
- Machines with special connections to state or federal applications
- Machines with other software (3rd party items) loaded

Departments will provide two or more machines from each category plus any others they know about. At the end of each test run those staff participating will have their machines and accounts upgraded to G3 and will not be included in any other upgrade runs

During these transitions we will have collected valuable data regarding success or issues. These runs help us to predict issues so that when we do larger Batches we have an anticipation of how much remediation will be required and set the Batch size appropriately.

Transition Issue Remediation

This is not a perfect process and conditions and specific machine situations can cause failure to complete the transition or issues after a completed transition. DTS has created an approach to support the two types of issues that may occur as well as a method to predict potential issues in Batches to determine the best approach to process that group.

There are two outcomes of each transition batch processing event:

1) **The installation is successful** – The staff persons 'seat' machine is loaded with the Office 365 G3 2016 applications, but there are questions and prompts which confuse the staff person.

> The help desk will be provided a list of those staff who are supposed to migrate for every batch processed. They would be expecting a certain additional call volume (based on the **Cross Sectional Testing**) and provide remote support in the current way they do.

2) **The installation fails** – For a number of reasons, the machine may not be operable and the staff person cannot use it. These situations need rapid remediation.

> The direct IT support for Department IT will be notified about hard failures in a Batch right after the Batch is run. They will coordinate the remediation with the department IT and complete the G3 installation. In extreme cases they may go on site.
>
> At this point we have identified four major categories of failure:
>
> 1. Machine not on network at time of transition attempt (undocked laptop)
> 2. Machine has been powered off
> 3. Machine is powered on but sleeping
> 4. Script fails part way through (all uninstalls work, G3 install fails)
>
> In cases where these types of failures occur, the Department It will be notified and those machines will be added into the next Batch to be processed.
>
> **To avoid cases 1, 2 and 3, Department IT will need to communicate with the owners of those machines to make sure that they leave the machines on in the correct state**
>
> In cases where it's machine failure or script failure, DTS will act as consultants to Department IT to help them and on extreme occasions go on site to assist.

Transition Briefing & Staff Awareness

DTS has created a transition briefing for those staff upgrading to G3. It has been delivered to staff from a number of departments already.

It is specifically focused for those staff upgrading from Office 2003 to G3 as it goes into the ribbon interface in detail but all could benefit as it covers topics like how to move PST files. DTS will provide train the trainer sessions for Department training groups so that they can pace groups through it.

We recommend you focus on those staff transitioning from Office 2003 to receive the transition briefing first.

DTS is modifying the County Office 365 Information Internet site to focus on the G3 transition and related items. On this site will be the transition briefing broken into individual topical sections which staff can review and links to the Microsoft Quick start reference guides for the 2016 applications

It can be accessed at the following address:

http://www.montgomerycountymd.gov/office365

Please include all information for transitioning

With each group of staff being transitioned please include all of the elements needed.

Items needed:

- Machine name
- Staff member Name
- Staff User Id (network id ('user01'))
- 32/64 bit (caution there are not 64 bit G3 transitions included)
- Operating system
- Version of Office being transitioned from
- Version of Office being transition to
- Special items to consider

It is important to include the network id ('user01') as that is how the G3 license assignment is facilitated.

Machine Replacements

Over the last 18 months a number of departments have declined to be upgraded to new machines as the County default image was based on Office 2003. Now with G3 Office 2016 is the standard in the County system software, the large backlog of machines in the warehouse are now being deployed with G3 Office 2016.

Please take into account those machines being replaced and leave them out of the batch transitions.

Staff Guidance

IMPORTANT: Before you leave work on the day before your machines are to be processed, save all work and close all applications!

Steps Staff should follow just before the overnight processing

1. Finish migrating un-migrated PSTs
2. Save all work
3. Close all applications
4. Close all folders
5. Sign off
6. LEAVE MACHINE ON
7. Make sure the machine sleep settings are set to always be ON

Steps Staff should follow after the overnight processing

1. Sign on
2. Verify Office software loaded
3. Launch any Office application (word, excel, PowerPoint) to activate
4. Staff may be challenged for user ID. Make sure they use the network id (i.e. 'aaa01@Montgomerycountymd.gov')
5. Verify that Outlook is working
6. Verify it opens files and operated as expected
7. As required check if any non-Microsoft software plugins are working

Known Issues

The following is a list of some of the items identified as causing issues

1. Machine is unavailable (undocked laptop)
2. Machine was powered off, no update possible
3. Machine was powered on but sleeping, no update possible
4. Installer script failed completely
5. Installer script failed to remove all software before installing G3
6. Machine had other issues
7. User prompted for repair (accept the repair request)
8. PST issues

9. Shortcuts (not there, or disassociated)
10. Previous versions don't uninstall