

## **Frey, Jon S.**

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**From:** Frey, Jon S.  
**Sent:** Monday, June 09, 2014 11:41 AM  
**To:** #MCG.Department IT contacts  
**Cc:** Klinger, Dieter; Tarquinio, Michael; Grubbs, Skyler; Taqi, Shayna; Frey, Jon S.; Plucinski, Karen  
**Subject:** Office 365 Migration Project Update #2  
**Importance:** High

### Introduction

This is the second in the briefing series associated with the migration to Office 365. In the first briefing the current service offerings were reviewed, some general information about direction and things that are happening was provided and a general request regarding how you and your teams can help was made.

In this update you will receive information regarding things that are happening but also some specific things that you can do to help prepare for the migration.

### Progress and DTS pilot

The contracting activities associated with the Office 365 implementation are reaching their final stages. Unfortunately, we ran into some unexpected delays. We hope to have the Procurement actives completed soon, so that we are able to proceed with the pilot.

DTS has been working with our implementation partner in preparation for migration. This includes updating software, patching, establishing AD and Exchange trust relationships, and doing all the other internal items required for the migration.

The implementation partner will also work with DTS on the pilot migrations. The pilot is planned to include implementation of each kind of configuration found in the County. This includes the various Windows and Office implementations.

As the pilot proceeds, various items will be finalized including how PST's will be handled, and figuring out other nuances such as how to handle Public Folders and VPN specials.

### Migration Items

A great deal of time and effort has been spent in migration planning to ensure that sufficient numbers of staff are migrated from various departments in each round of migrations but not to overload with too many in any given migration event.

This analysis has looked at the populations associated with staff using Office 2003 and 2007+ to determine groups that have affinities and interactions which may need to be migrated within the same migration event.

As it stands right now there are 10 migration events planned, with DTS being the first and then starting in July, a series of migration events occurring roughly at 1 to 2 week intervals. It is anticipated with this pace that the base migration can be completed by the end of September 2014.

## **Migration groups**

Migration groups typically consist of multiple departments that will be migrated together. In some cases larger departments with many staff will result in less departments in a given migration group.

Migration groups are very important as they're treated as a unit for the purpose of migration. What this means is all communications associated with that migration group is focused for the particular portion of the migration activity they are engaged in.

Migration groups will have a series of communications during the process of migration. Later in this document will be a discussion of some of the communications plan associated with the migration and how this will affect the various IT contacts and Department staff.

## **Migration events**

Migration events are four week cycles.

- They begin with briefings to IT contacts and other associated staff and training for those who will be helping with migration.
- Also during the first two weeks, the staff is provided an opportunity to use the various training tools developed for the migration to brief themselves on the various aspects of what will be expected during and after the migration.
- These tools include tutorials that are rendered in storyboard form, video tutorials following the storyboard and for the four action oriented items User Productivity Kit (UPK) simulations to allow staff to try certain types of functions such as compose and send message.
- During the third week final preparations for migration will occur, briefing sessions (in-person and webinar) will be held, followed by the actual migration.
- Following the migration, staff will return in the migrated environments at that point a week long recovery period will start and for the fourth week.

All of this is covered in the communications plan associated with migration which will be provided separately.

## **How can you help now?**

The more preparations that Department IT contacts can do prior to migration the smoother the migration will go. Here are some areas that we can focus on immediately that have high yield.

### **Review, Clean up and Clean Out mailboxes**

The first activity that all IT Contacts and OU's need to be engaged in is to determine which mailboxes will be migrated. Departments should not migrate mailboxes of staff who have left, seasonal staff (left over mailboxes), or any other kinds of conditions where mailboxes are not being used.

Conversely there are special mailboxes that need to be preserved, such as those that are used in conjunction with the Enterprise Service Bus (ESB) that are used to send out notifications during those processes.

As the migration is scheduled, please work with staff to remove all extra messages left in the mailboxes. The speed of a given migration is based upon the amount of messages there are in the mailbox. The greater the number of messages in the mailbox the longer it takes to move the mail store into Office 365.

## **Determine which Public Folder data needs to be moved into Office 365**

NOTE: Public folders will be migrated after completion of migration of all mailboxes.

Public Folders were created by Microsoft a number of years ago to handle certain kinds of information which at that point it was difficult for the mail system to accommodate. Public folders consist of five different kinds of data being stored.

- Messages
- Tasks
- Contacts
- Schedules
- Documents

DTS research has determined that at the peak there were 3112 public folders. Of these public folders it's also been determined that 700 of them are currently empty. Since November 2013, only 120 Public Folders (spanning 18 departments) have been updated. Every effort should be made to ensure that only useful data is migrated into the Office 365 environment, by deleting unneeded files and public folders. **Please start cleaning now.**

The actual process for migrating different types of Public Folder data will be documented in the IT Contacts Migration Guide.

## **Help the Staff using Office 2003 and 2007+**

One of the other areas where staff and IT contacts can assist is helping the various staff within their departments to understand first which environment they are using to determine which training specifically applies to them. Although the majority of training is focused at the Office 2003 environment transition, as it is the most dramatic change, (and includes over 50% of those being migrated), there are areas which are specifically helpful to the staff using Office 2007+, such as how to move PST files into the cloud mail store.

The first order of business will be determining which Office environment staff has. This is documented on the Office 365 transition web site and in the IT contacts users' guide. Once the version of Office products is known department IT staff can better support their department staff in helping them to understand what kind of transition they will go through and what kind of tools they should use.

## **Communications Plan Events**

The Change Management team has been working very closely with DTS on this project. Their primary roles are in two major areas, one is communications, the other training and documentation.

In the first area they have developed the communications plan which will help to ensure that all the parties involved the migration are communicated to appropriately at the right time to do the right function.

The second area is the creation of the User Productivity Kit (UPKs) to support staff training activities.

## **IT Contacts Pre-Migration Briefing**

Migrations occur as migration events. A migration event is defined as groups of departments that are migrated during a single activity. The size and scope of the migration events are driven by various selection criteria some of which considers how many staff are being migrated any given migration event.

Prior to migration events the Department IT contacts and staff supporting the migrations will be briefed by DTS. This briefing will cover the major events associated with migration and things that they should be aware of, and how they need to help within the department during the migration.

This meeting forms a precursor and the launch of the migration for the IT resources and associated staff who be supporting the migration.

### **IT Contact training**

During the first week of the migration event IT contacts from the departments involved will be provided training regarding what's expected from that particular migration. This training focuses on things such as how to help with PST's, how to help with public folders, how to handle VPN situations and other potential migration challenges.

This is done in the first week so that when department staff is notified these IT contacts should be able to form the first line of response to answer basic questions. In addition, FAQs should be used as a tool and added to throughout the process to ensure they provide a ready source of response to people who have questions.

### **Training**

The Office 365 training consists of tutorials which the staff can review through the website that will be provided to them. This website is Internet-based so staff can access this information from anywhere at any time.

The tutorial information will be rendered in three different forms

- Story boards which are PowerPoint presentations which have been annotated.
  
- Videos with closed-captioned which follow the story boards previously mentioned.
  
- User Productivity Kit's (UPKs) simulations will be developed for some of the key action activities such as compose and send message. This allows staff to try various functions without actually using the tools.

### **Web Site**

An Office 365 transition project web site has been created and will continue to be used for the various phases of migration After the Outlook migration the site will be reused with different information for subsequent phases of migration.

The website contains a number of elements to assist IT contacts and staff during the migrations. This includes general descriptions regarding the products and services being provided, there are write-ups such as presentations, Frequently Asked Questions (FAQs), and then there are tutorials rendered out in various forms.

For the department IT support staff an additional web site with migration support documentation will be provided. This will assist in providing tools and various communications documents which department staff can then use to support migration activities.

### **IT Contact Users Guide**

As the IT contacts and support staff from the various departments and DTS will be handling various kinds of staff needs, an IT Contacts users guide for migration has been created. This guide covers various migration elements describing what they are and more importantly how to do things with them and about them.

The guide includes a section called 'How do I...?' detailing the process involved in handling any particular element associated with migration will be described, such as how do I move data in public folders? This guide will continue to evolve and will be finalized as the pilot and early migration events complete.

In the next communication more specific regarding the various activities and documentation needed to assist in migrations will be provided.

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