

Montgomery County

Office 365 Migration

Phase 1 – Outlook Migration

Department IT Contacts – User Guide

Version .95

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This document provides information and instructions to the Department IT contact to support the activities associated with the migration to the Office 365 products

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Introduction

The Office 365 migration is a countywide initiative to move from the current Microsoft infrastructure to the Office 365 cloud-based environment. This project is to be conducted in phases the first phase being Outlook mailbox migrations, the second phase being Office applications migrations, and another phase for other items which need to be addressed.

For each phase of the project a guide will be created which covers the specifics associated with migrating that particular type of application and its associated data.

Phase 1 Migration Description

The phase 1 Office 365 migration is focused around moving the Outlook exchange mailboxes and associated information from local servers to cloud-based servers. In this process the mail stores which would include messages, contacts, schedule items, and tasks would be moved by DTS in conjunction and with coordination by the departments.

Additional files such as PST's, and Public Folders will be addressed by your team in conjunction with staff from your department and using instructions which are found in this manual.

There are two major groups within your department which will be migrating.

- Those staff who are using office 2003
- Those staff who are using office 2007+

All Office 2003 products are at end of life technically and no longer supported. Therefore those who use the Office 2003 products those staff will discontinue use of the desktop-based versions of the software in favor of accessing web-based replacement software. For example those who use Outlook 2003 on the desktop today will be using Office 365 OWA on the Internet once migrated.

For those staff that is using Office 2007+ products their mail stores and associated data will be moved from the local environment to the cloud however they will continue to use their current desktop versions of software. The only difference will be that PSTs are read-only. << VERIFY >>

Planning for the migration

Migrations will occur in groups where numbers of departments will be migrated together during the same migration event. To facilitate this migration groups are being formed based on various characteristics associated with the departments and their interaction and interdependency with other departments.

Your teams role

You and your team play key role in the migration activities as you understand your client base better than anyone else in the County. As such you understand how to motivate them to take training and participate in things such as reviewing Public Folders and PST.

DTS and the local IT department contacts form the on-site migration teams that will help each of migration groups successfully complete their activities and monitor their operations for.

We need your wisdom and your enthusiasm to support this activity. Will be working with you and your team provide training and share the timeline for migrations. Within your department you need to plan for migration in a number of different ways to include:

1. Clean up unused mailboxes and resources such as Public Folders.
2. Identify those special mailboxes which need to be retained i.e. ESB has mailbox that send out notifications of transmission activities
3. Work with staff, (especially those who use Office 2003 Outlook), to ensure that they've taken the training tutorials and have used the UPK tools prior to migration so that when they arrive after migration they can perform the basic functions needed to continue operations.
4. Help identify special cases of PST's and a strategy to move the PST's for those staff who have multiple ones.
5. Provide support during the migration to help field questions from your staff in the department regarding basic activities associated migration remember the user interface will change dramatically for the Office 2003 users.
6. Determine the relevancy of Public Folders for the department and indentify those whos data will need to be moved into Office 365.
7. << VERIFY >> If we need other things from the onsite teams

As soon as a migration date has been set for a migration event, all impacted departments will be notified (4 weeks before the migration date)

What we need from you and your team:

- Confirmation of the data we have collected indicating the split between Police staff with different software versions
- Information regarding staff who have multiple PST files so that we can determine how best to migrate them.
- Local assistance ensuring that Police staff review the tutorials and are guided there after migration before calling the help desk
- Coordinating and supporting post migration recuperation activities

What we need

- 1) You and your teams' support for project and timeline
- 2) Data about your department
 - a. VPN use and special considerations
 - b. Identification of both staff primary PST and those staff with multiple PSTs
 - c. Special configurations which use Outlook or exchange server
 - d. Outlook add-ons (connectors, converters, etc.)
 - e. Identification of mail enabled applications
 - f. Identification of specific Public Folders to migrate and all security permissions associated with them
- 3) Resources from your team during roll-out (still being defined by to include)
 - a. Direct trouble shooting with individual staff from your department
 - b. Training assistance to ensure your Departments staff has seen the tutorials
 - c. Moving Public Folders as required
- 4) Tutorials are a key success factor in this project. It is critical that the Department staff access and review these early and often until they are migrated. Once migrated that can only operate in the new environment.

The team is constructing tutorials in both PowerPoint storyboards and video format. These will be provided in a readily accessible area and we need your help in encouraging department staff to go online and review the tutorials. There are 10 tutorials at this point which represents about 30 minute's total time to view them. Staff should be able to work that into their schedules before the migration and worst case if they did not look at them before that can review them after they migrate.

- 5) Feedback from you

Staff Training

One of the key activities associated with this migration is to train the staff about what they should expect once they have been migrated. For the office 2007+ staff the transition is not very dramatic as most the activity is pointing their data to cloud storage rather than local storage.

In the case of staff using office 2003 applications the change is much more dramatic. All the Office 2003 desktop agents will stop working once they have been migrated to the cloud. To replace them Microsoft provides a series of cloud-based applications that provide similar capabilities. In the case of Outlook 2003 the cloud alternative is the OWA. OWA is very different than the one in use today and staff will need a bit of assistance to navigate and use it initially.

Migrations are divided into migration groups which consist of groups of departments (except for very large departments such as HHS). These migrations occur on a regular schedule of a group every week or two. The timeline for preparation for a given migration is roughly a month. This means your department will begin the migration activities in earnest one month before the actual migration is scheduled to occur.

Tutorial approach

In order to successfully migrate the 10,500 staff that need to move training has to be handled a very expeditious manner. Of those who are being trained the 2003 products staff are the ones which need the most help as their user experience will change dramatically between what they currently have and the Office 365 implementation.

For each phase of the migration a series of key Office related activities have been chosen and then training in the form of tutorials will be created to show the staff how those functions work. For example creating and sending messages is a key activity of the mail system so consequently one of the tutorials describes how that's done.

In total there are eight Outlook tutorials one to cover the Chrome browser as that will be the main browser), and one for staff using Office 2007+ to show the differences post migration. The tutorials are being rendered out in three different ways but conveying exactly the same messages the matter which method is being used.

- **POWER POINT:** In one form they are PowerPoint storyboards which are screenshots with descriptions embedded in them to allow the user to read along and view the interface in a static manner but letting them understand the various elements available.

- **VIDEOS:** Another form are videos which use the PowerPoint storyboards as a baseline only they actually walk through the product in animated fashion with voiceovers describing the various activities.
- **UPK:** In the third form a User Productivity Kit (UPK) will be created for each of the major tutorial activities and therefore the staff can use the UPK to walk through the product in a safe and non-production mode. This is important as it enables the staff to practice the activities.

Note: These tools will address ADA compliance with closed captioning

The form which the tutorials take is targeted to be roughly 5 to 7 min. each and structured in a manner that staff can take them in any order, repeat as many times as they want, and review them again and again.

Browser Handling

The office 365 approach to browsers has a lot to do with the operating system on which the desktops are running. Within the universe of systems and operating systems in the County there are roughly 2100 XP based users.

XP – Operating System

In the case of XP based systems that need access to OWA, the recommendation is that the County will use Firefox as its alternative browser. Firefox is a good alternative as it also works well with the ERP-based solutions such as BI tools and staff self-service.

Firefox will be deployed to the staff with XP based systems prior to migration but not associated with the OWA icon until it is time to migrate that department.

Windows 7 – Operating System

For the Windows 7 based systems the IE browser is supported by Office 365 and thus OWA will operate with it. No alternate browser is needed or will be deployed.

Desktop Icons

Because of the association of OWA with a particular browser or the Office 365 migrations there will be two desktop icons deployed.

- For staff using Office 2003 with the XP Operating System the OWA Icon will associate OWA to the Firefox browser.
- For staff using Office 2003 with the Windows 7 Operating System the OWA Icon will associate OWA to the IE browser.

The icons will have an association with the browser by including the browser logo as part of the icon. Staff that has these desktop icons will have only one on any given machine to address the particular Operation System / Office 2003 combination

Working with PST files << VERIFY >>

Among the areas that have potential challenges for the migration are the management and movement of the PST files associated with e-mail accounts. Most all e-mail accounts have PST's although it's been noted that in certain departments certain staff will use some form of remote access and therefore are not likely to have them.

On the other extreme there are power users within the County that have multiple PST's. Our challenge is to determine which PST's need to be moved when the mailboxes migrated and to take care that move. Then we need to provide tools to allow you as the Department IT contacts to help facilitate the movement of the remaining PST's should the staff members desire that.

There will be tools which will help determine the number of PST's but at this writing there is no determination of which PST is actively associated with a given mailbox.

For those 2007+ users the PST situation is a lot less complex. After those users migrate the PST's they had before will still be available in their mail store however they point back to the old PST location and be read only. During the follow-up activity staff will drag and drop the PST's into their cloud-based file store for messages and folders which will then be reconciled and become accessible from anywhere.

NOTE: There will be a hard deadline for all data associated with Outlook in the current operating environment. Departments will have sufficient time to complete whatever follow-up tasks are required. Once the deadline date is reached desktop versions of 2003 product will be removed and within the actual local County mail stores file such as PST's and Public Folders will be eradicated permanently.

PST Handling

PST handling appears to be very challenging and so far consultants who done migrations have not migrated many PST's. As with other parts of this project there are two PST approaches based on which versions of Office staff are running.

Part of the challenge of the PST's is it takes roughly dirty to 60 min. to move any given PST. Given the bandwidth between the County and Microsoft cloud it's unknown how rapidly PST moves can be achieved. Another part of the challenge is that there is no tool to move multiple PST. So each PST has to be moved individually by hand.

Office 2003

For the staff using Outlook 2003 their PST's will remain connected to their current desktop based Office 2003 application. This means that those PST's will not be migrated or are visible in OWA. Should staff wish to view the PST's they would need to go to their desktop version of Outlook 2003 to access them. They can only be accessed in 'read-only' mode.

In the event that staff wishes to have their PST data moved to the cloud and accessible via OWA then they need to contact their local IT staff and request that the PST be moved. The local IT staff using tools provided by DTS will be able to move the PST's one at a time.

Office 2007

For staff using Office 2007+ it will be business as usual after migration with respect to PST's. The PST infrastructure will be maintained as is and only the mailboxes of the 2007+ staff will be moved. Staff will access their PST's as they usually do via their desktop agents for the software.

Should they desire to move the PST's into the cloud for more global access and to prevent them being deleted when the PST's are removed from the current of the structure staff will be able to drag-and-drop them themselves.

Once the staff drag-and-drop their PST's into the cloud mailbox store they'll be safe from being deleted when the PST is removed from the current of the structure. They will also be accessible globally from wherever the user may be.

Addressing Virtual Private Networking (VPN) Specials

Virtual Private Networking (VPN) is a capability which is used in a number of situations across the County. At last count there were over 3,000 VPN users using a variety of different kinds of applications which require the VPN.

For those staff that are required to use cloud-based versions of office 365 software such as OWA Internet access is required. Part of VPNs security is in certain circumstances to block Internet access. So long as these security features have been activated its expected that the staff person can use the VPN as they normally do to access the Office 365 cloud-based applications.

There is one known exception which is the **Network Connect** feature VPN users to establish further security for certain types of applications (such as the new Web content management system CMS). When the VPN has network connect feature invoked it will create a secure environment such that no Internet access is possible.

During the early stages of migration when you conduct the analysis of your department, keep a record of VPN users who use the **Network Connect** feature in order to conduct their business. We will need to determine a solution for those users.

Working with Public Folders

During the mid-2000 Public Folders became a popular method to hold certain types of information which are hard to manage in the conventional mailbox approach. Things such as calendars for conference rooms were put into Public Folders before the “resource” capability of Outlook became readily available.

Last inventory of Public Folders indicated a total of 3112 in the County. Of these hundreds are empty and thousands have not been used since November last year. There are roughly 120 folders in use today across a number of departments. Departments are encouraged to review the

Given this information we still reach out to departments and requested a review all the Public Folders to ensure that they have not missed something that they want. We recommend that they moved the Public Folders only after they have coordinate with their department staff and determine the best use of this particular kind of data.

Note: Once the data eradication activities begin any remaining un-migrated Public Folders will be permanently eliminated

| | | | |
|-------|------|-----|------|
| BIT | (4) | CCL | (1) |
| CEC | (2) | CFW | (3) |
| DGS | (5) | DLC | (1) |
| DOCR | (19) | DPS | (1) |
| FIN | (7) | FRS | (3) |
| HHS | (20) | MCG | (1) |
| OCA | (1) | OCP | (2) |
| OEMHS | (4) | POL | (21) |
| REC | (1) | SHF | (4) |

Table 1 – Public Folder – Departments with active Public Folders as of (4-30-14)

Reconciling the data from Public Folder into Office 365

Data from the current Public Folder structure will be migrated into one of three types of *solutions*

- 1) Share Point
- 2) Shared mailboxes
- 3) Resource mailboxes
 - a. Room mailboxes
 - b. Resource mailboxes

Various data types from existing Public Folders will reconcile in various ways please refer to table.

| Data Type | Office 365 Solution |
|----------------------------|-----------------------------|
| Calendar (Conference room) | Resource - Room Mailbox |
| Projector | Resource - Resource Mailbox |
| Messages | Shared Mailbox |
| Contacts | Shared Mailbox |
| Tasks | Shared Mailbox |
| Documents | Share Point (MOSS) |

Table 2 – Public Folder - Office 365 solutions

It is the responsibility of the Department IT staff to establish the proper permissions based on coordination with department staff for all the Public Folders they decide to maintain.

Public Folder FAQ's (provided by Microsoft)

- **When a user moves to OWA and there are Public Folders in the old mail server infrastructure can they still access them?**
 - o This depends on how the existing environment is configured. There are certain requirements in Hybrid configuration that must be followed to allow users in the cloud to see on premise Public folders. As defined at: [http://technet.microsoft.com/en-us/library/dn249373\(v=exchg.150\).aspx](http://technet.microsoft.com/en-us/library/dn249373(v=exchg.150).aspx)

- **Correspondingly, in the new Office 365 environment how does one see the equivalent of Public Folders?**
 - o An example of accessing the Public Folders can be found in this blog post: <http://blogs.technet.com/b/lystavlen/archive/2012/07/18/public-folders-in-office-365-preview.aspx>

- **Are shared mailboxes and resource mailboxes the same?**
 - o No, while they both do not require a license they operate differently within exchange. Resource mailboxes are geared more towards management of resources like conference rooms so their configuration allows them to appear in certain interfaces within Outlook and Outlook Web Access compared to a Shared Mailbox which simply acts like any other mailbox. A Good introduction to resource mailboxes can be found at: <http://exchangeserverpro.com/exchange-server-2013-room-equipment-mailboxes/>

- **Are there limitations in numbers of mailboxes?**
 - o NO

- **Can staff update them directly or do you need special admin access**
 - o Admins manage their properties but control can be delegated to staff directly

- **Are all folder permissions transferrable to the mailbox and MOSS configurations?**
 - o This answer truly depends on current configuration and methods used for migration. This would likely be better answered by the partner you would be working with once topology is determined.

- **If I am an Office 2007+ user and I have been migrated. Would I still see Public Folders that still existed in to old environment?**
 - o This again depends on how the environment will be configured.

Office 2003 retirement

There'll be a period of time after the last migration when the PST file will be maintained in the current of the structure the kit. It's anticipated that this of the roughly 6 to 12 months. During that time staff are encouraged to determine if they need there PST's and which PST they may need and to coordinate their moves if they're not able to move themselves.

Migration Timeline

Migrations will occur on a regular basis with groups of departments being migrated simultaneously. On Thursday night of migration week that department staffs that were scheduled for migration will have their mailboxes moved behind the scenes such that that Friday morning they will see and be pointed to the new Office 365 environment.

The pre-migration activities span across four weeks. There are number things which will be documented and shared to assist IT contacts working with your department staff to finish the various tasks prior to migration and then perform the required tasks to move the remaining information you desire to keep.

During week three of the migration timeline all staff will have completed training through the tutorials. A live demo and Q&A session which of the hosted for those staff desiring that form of training.

There will be a series of activities post migration that every staff member should perform such as rebooting their machines. (Checklist to be provided)

Typical Migration Flow

| Event | Day | Description | Who Does |
|----------------------|-----|---|----------|
| Pre Migration | | | |
| PMGE-1 | TBD | Postmaster Global Announcement (All Employee) | |
| PMGE-2 | -30 | Directors Notification (One instance) (Email) | DTS |
| PMGE-3 | -30 | MLS Notification (One instance) (Email) | DTS |
| PMGE-4 | -14 | All Tech Lead Migration Briefing | DTS |

Week - 1

| | | | |
|-------|---|--|-----------------------|
| MGE-1 | 1 | Launch Notice to Department Staff of Migration Group | Department Tech Leads |
| MGE-2 | 1 | Migration Group Staff Training | MG - Staff |
| MGE-3 | 2 | Migration Group Staff Training | MG - Staff |
| MGE-4 | 3 | Migration Group Staff Training | MG - Staff |
| MGE-5 | 4 | Migration Group Staff Training | MG - Staff |
| MGE-6 | 4 | Pulse check with migration group tech leads | DTS - MG-Tech Leads |
| MGE-7 | 5 | Migration Group Staff Training | MG - Staff |

Week - 2

| | | | |
|--------|----|--------------------------------|------------|
| MGE-8 | 6 | Migration Group Staff Training | MG - Staff |
| MGE-9 | 7 | Migration Group Staff Training | MG - Staff |
| MGE-10 | 8 | Migration Group Staff Training | MG - Staff |
| MGE-11 | 9 | Migration Group Staff Training | MG - Staff |
| MGE-12 | 10 | Migration Group Staff Training | MG - Staff |

Week - 3

| | | | |
|--------|----|--|------------------|
| MGE-13 | 11 | Final Prep Notice to Department Staff of Migration Group | DTS |
| MGE-14 | 11 | Migration Group All - Final Prep | DTS / MG - All |
| MGE-15 | 12 | Migration Group All - Final Prep | DTS / MG - All |
| MGE-16 | 13 | Migration Group All - Final Prep | DTS / MG - All |
| MGE-17 | 13 | Readiness review | DTS / Tech Leads |
| MGE-18 | 14 | Migrate - Migration group All | DTS |
| MGE-19 | 15 | Recovery Room for Migrated MG | DTS / Tech Leads |

Week - 4

| | | | |
|--------|----|---|------------------|
| MGE-20 | 16 | Recovery Room for Migrated MG | DTS / Tech Leads |
| MGE-21 | 17 | Recovery Room for Migrated MG | DTS / Tech Leads |
| MGE-22 | 18 | Recovery Room for Migrated MG | DTS / Tech Leads |
| MGE-23 | 19 | Recovery Room for Migrated MG | DTS / Tech Leads |
| MGE-24 | 19 | Send Migration Close out message & survey | DTS |
| MGE-25 | 19 | Check with L3 regarding trouble ticket trends | DTS |

Post migration items

Once the migration is complete the staff will access their messages contacts tasks and other items associated with their mailbox. Staff will use the mailbox to communicate following those instructions provided by the tutorials.

As the IT contacts of the department you have some follow-up tasks which need to be performed primarily focused around Public Folders and PSTs.

PST finish up

The PST finish up activities are associated with moving or shifting staff to move those remaining PFTs which you wish to preserve from the current server-based environment into a cloud-based solution. This is still being finalized and will be part of the final documentation

(More to be added once details are known)

It is expected that most of the city activity PST activity will be associated with the 2007+ staff as they're more likely to have multiple PSTs.

Public Folder finish up

In the event that there are still Public Folders which have not been moved prior to the migration and wish to be preserved then you as the IT department contacts will need to work with your local staff to determine which ones they are and then to implement them in there is a resource or shared mailbox or in the case of documents share point.

(More to be added once details are known)

How Do I?

In order to successfully migrate the 10,500 staff that need to move training has to be handled a very expeditious manner. The following section describes how specific activities are addressed. As details emerge from the pilot and early migrations this section will continue to be refined.

(More to be added once details are known)

Determine which version of office a staff member has

One of the first steps in migration is to ensure that various staff are reading and reviewing the material associated with the particulars of their migration 2003 or 2007+.

It is not possible to send separate messages to the staff with different various versions of Office. All communications will include both with references as to which parts to concentrate on based upon version.

Microsoft has provided instructions for determine which version of office (please see Appendix B)

Handle PSTs

In many cases staff will have multiple PST folders. The migration team is working to move the primary PST and moving it as part of the migration. Any additional PST moves will be handled using the following instructions.

Finding PSTs

The first step of the process is to locate all PSTs that a staff person can have. It is likely that the 2007+ version users are likely to have multiple PST files although there are some limited reports of 2003 version users with multiple PSTs.

One of the main issues associated with locating PST's is to determine the main PST that's used with the mailbox. Once this has been determined that PST would be the one that would be moved along with the mailbox stores.

(More to be added once details are known)

Moving PSTs

Once identified the staff would use one of two approaches depending upon which software staff person was using at the time of migration.

- For staff using office 2003 software ...
- For staff using office 2007+ software ...

(More to be added once details are known)

Handling Public Folders

Public Folders were a method to allow staff to access various types of data which staff needed access to. In many cases, data such as room schedules and message traffic archives were maintained.

The County has 3112 Public Folders which represented all folders from all departments. In November of 2013 all the Public Folders were moved to a new server and the "last change" date was reset to that accordingly.

Since then less than 200 folders have been access and updated. There are at least 700 empty folders and the lack of activity implies that these folders are not being updated any longer.

Determining which Public Folders should be migrated

First, Department IT contacts must determine the status and need for the things that required Public Folders.

In many cases, the Public Folders had been established to handle things which were difficult to do in earlier versions of Outlook. These functions are either no longer required or being handled through other accommodations within the newer version versions about of Outlook.

Since not all data is still pertinent this should be an opportunity to clean up the public folder environment.

Moving Calendar Data

Calendar data is used both for recording events which occurred on the calendar and in some cases to schedule resources such as conference rooms.

In the event the data is for a conference room then a resource mailbox in Outlook 365 is the solution. You'll need to allocate one mailbox for each calendar that will be supported.

In addition, resource mailboxes actually have two types of resources they manage.

- 1) Resources - such as conference room.
- 2) Equipment - for things such as projectors.

Once the calendars have been moved and the appropriate mailboxes in Outlook 365 the permissions required within the department to support who can perform what functions needs to be defined.

Moving Messages

Mail messages require a mailbox to be stored. Very similar to scheduling in order to store the messages in Public Folders these messages would require a shared mailbox to store them in the Office 365 environment.

Once moved into this shared mailbox appropriate permissions will be required to allow authorized staff to access this mailbox.

Moving Task Lists

A Task list is very similar to messages and is considered a mailbox-based item. In the case department wants to save tasks in office 365 as they had in with Public Folders they will need to have a shared mailbox and then move the Tasks into the shared mailbox following the following procedure.

Once the tasks have been moved the appropriate shared mailbox permissions should be provided for those staff that should be authorized to access that information.

Moving Contacts

Much like schedules, messages, and tasks contacts are part of the mailbox structure and will need to use shared mailboxes to preserve the contacts.

Once the data has been put into the shared mailboxes the IT contacts will provide permissions required so the data can be shared amongst those authorized users.

Moving Documents

Documents are a different category of data. In the Public Folder context, data was stored in the native form such as a word document. In the Office 365 environments there is no specific corollary to that with the exception of SharePoint.

For those documents which departments wish to preserve in the Office 365 environment and share in a similar fashion a structure needs to be established within the Share Point that support these data and these documents.

It is very important that time is spent in creating the appropriate data structures within SharePoint to support the data which the department desires to have available.

Addressing VPN Special Situations

Virtual private networking or VPN is used to provide a secure path through the Internet to allow access certain kinds of applications while staff is remote. Office 365 does not require VPN access to reach and use the various cloud-based applications.

In the case where a staff person is using VPN for other access requirements and wishes to access office 365 cloud-based tools they should be able to do this via “split tunneling”. In split tunneling there are two tunnels created in VPN one which is a cure tunnel those data which required and the other which is an open channel for pure Internet access

In some cases certain features of VPN will cause the split tunneling feature to be disabled and thereby disabling any access to the Internet. This proves very problematic for that staff that are using cloud-based applications exclusively.

(More to be added once details are known)

Determining if there are VPN challenges

The VPN has many different features and capabilities one of which is called **Network Connect**. The network connect feature allows for access to certain kinds of application which require more intense access then pure file storage would.

In the case where network connect is used split tunneling is disabled and therefore cloud base Office 365 applications are not accessible. In other cases there should be no issues with running VPN and cloud-based Office 365 applications.

Addressing Challenge n

The first step of ...

(More to be added once details are known)

Mobile Devices

The following section describes how specific mobile device activities are addressed

The approach should be, we don't migrate any Department staff to O365 that is not in full security training compliance yet. It is up to the Dept and/or Security Team and/or OHR to trace after any NEW employee/contractor/volunteer/intern/Partner/somewhere in between.

Proposed Mobile Device Rules

- 1) All mobile devices such as iPhone, Androids, etc. that access County systems must be protected with a PIN or other login password
- 2) You must report lost or stolen mobile device which access County Systems to the Helpdesk AS SOON AS POSSIBLE. This includes devices that you own!
- 3) Sensitive information stored on such devices must be encrypted, including email messages.
- 4) Consult with your supervisor if you are unsure of what type of information you may store on your mobile device

Approach for re-validating Mobile devices

- 1) All Mobile devices will be set to 'off' for validation.
- 2) All Mobile users must have an AD account
- 3) Once the staff person tries to use the Mobile with County ... they will be prompted to go to a acceptance page
- 4) At the acceptance page the system will confirm they have taken County security training
 - a. If they have not taken it indicate to the user and shut down.
 - b. If they have taken it go to step 5
- 5) Provide details of eraser policy and require acceptance
- 6) Staff person accepts policy
- 7) System Sets standard parameters
 - a. Pin timeout
 - b. PIN
 - c. ...
- 8) User is signed on

Closing Remarks

All efforts possible are being made to ensure that this transition will go as smoothly as practical. There are a large number staff to move with a variety of different complex environments. It is challenging to ensure that the staff is fully trained prior to the migration however with the tools and capabilities being put in place we have the best chance of being successful in these efforts.

Appendix A - Glossary

All

Office 365 Services

Cloud Based services provided by Microsfot

PST

Mail store facility for MS Outlook

Appendix B – Office 365 Service Offerings

The Office 365 environments we are contacting for are:

- (G1) - Basic Mail Services (Paid for by DTS)
 - o 50 GB mailboxes for every user
 - o Elimination of PST files; mail folders available from any device anywhere
 - o Many new features/functions, including:
 - Individually controlled internal and external out-of-office messages
 - “Working Elsewhere” calendar label
 - o Browser versions of MS-Word, MS-Excel, MS-PowerPoint and MS-Outlook
 - o Better support of mobile devices for e-mail, contacts and calendars
 - o Greatly improved Outlook Web Access (OWA)
 - o 25 GB U: drive for every user
 - o Searchable S:, V: and U: drives
 - o Sanctioned Cloud-storage
 - o Instant messaging
 - o Video conferencing
 - o MOSS (SharePoint)

- (G3) - Additional fee items (Paid for by Departments)
 - o Unlimited e-mail storage and online eDiscovery/legal hold
 - o Data loss prevention (rules to encrypt, rules to prevent leakage)
 - o Latest version of MS-Office on 5 devices
 - o Additional network file storage

As the contacting and such is not completed I can provide specific pricing but product literature indicates at the follow rates should be expected:

- G1 Services - \$6/month per user account
- G3 Services - \$17/month per user account

Note: Additional fee items will not be offered until the Office 365 migration has been completed

Appendix C – What version of Office am I using?

What version of Office am I using?

You can use the screen captures and steps below to see which version of Microsoft Office is installed on your computer.

Office 2003

Office 2003 has text-based menus on the gray bar: File, Edit, View, Insert, Format, Tools, Table, Window, and Help. The following shows Word 2003.

1. Click Help > About.
2. In the About dialog box, find the version and the Service Pack (SP). Product licensing appears in the This product is licensed to field.

Office 2007

Office 2007 introduced tabs and the **Microsoft Office Button** and a tab menu. The following shows Word 2007.

1. Click the **Microsoft Office Button**  > **Word Options**.
2. In the **Options** dialog box, click **Resources**. Find the version and the Service Pack (SP).

NOTE To learn about licensing, in **Resources**, click **About**. On the **About** dialog box, see **This product is licensed to**.

Office 2010

Office 2010 introduces the **File** tab and the Microsoft Office Backstage view. The following shows Word 2010.

1. Click **File** > **Help**.
2. Under **Product Activated**, find the version.

NOTE To learn about licensing, see **About Microsoft Word**.

Office 2013

The latest version of Office still uses the **File** tab and the Microsoft Office Backstage view. The following shows Word 2013.

1. Click **File > Account**.
2. Under **Product Information**, find the version.

NOTE To learn about licensing, click **About Word**.

Office 2013 RT

Office 2013 RT also uses the **File** tab and the Microsoft Office Backstage view. The following shows Word RT.

1. Tap **File > Account**.
2. Under **Product Information**, find the version.

NOTE To learn about licensing, tap **About Word**.

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