University of Wisconsin-Madison
Microsoft Office 365 Transition for Email and Calendaring

In the coming months, all UW-Madison students, faculty and staff will transition to a new email and calendar system called Microsoft Office 365. The campus migration to Office 365 will be phased, with the first group of early adopters slated to begin in Summer 2013.

Your name was provided to us as a technical expert in email/calendaring for your school/department/group. We ask that you provide answers to this survey so that we better understand your current email system and begin to prepare the tools and resources necessary for a successful transition to Office365.

Depending on your email and calendaring system, the survey may require technical expertise to complete. We predict this survey may take up to 4 hours to complete.

We recognize that your time is in demand, and we appreciate your attention to completing the survey in a timely manner.

If you have any questions or concerns about the survey, please contact us at office365-migration@lists.wisc.edu.

Name of Department/Division

Primary Administrative Contact

Primary Technical Contact

System Software and Version

Does the system provide email capabilities?

☐ Yes
☐ No

Does the system provide calendar capabilities?

☐ Yes
☐ No

What domain(s) does your system host?
Which, if any, of your hosted domains are not affiliated with the UW?

Describe any applicable organizational data retention or archiving policies

Describe any applicable organizational password policies

Describe any applicable data security requirements (HIPAA, FERPA, encryption, PKI, etc)

Does your system offer the following:

- Off Campus Access
- Mobile Device Access
- Data Encryption

Number of Email/Calendar Accounts

- Accounts Used By Individual (Users)
- Accounts Not-Affiliated With a Specific Individual (Roles)
### Accounts Used Solely for Programmatic Purposes

### Accounts Used Solely for Mail Forwarding (Aliases)

### Groups/Lists

### Calendar Resources (Rooms, Equipment)

#### Number of Email/Calendar Accounts That Forward

- To Internal Addresses
- To WiscMail
- To Other UW Departments
- To 3rd Party E-mail Systems

**Provide any additional important information about email forwarding on your system**

#### Describe the process for provisioning email/calendar accounts

#### Describe the process for removing/deactivating email/calendar accounts

**Do users of your email system use offline archiving (not on server)?**

- [ ] Yes
- [ ] No

**Estimate the number of email accounts at each of the following sizes:**

- [ ] Less than 200 MB
- [ ] 200 - 500 MB
What, if any, is the maximum allowed mailbox size?

What is the total amount of email data stored on your server?

What, if any, limits are there on message attachments?

Do email/calendar accounts in your system also have access to any of the following?

- [ ] Instant Messaging
- [ ] File Sharing Services
- [ ] Network Resources (File Servers and Printers)
- [ ] Desktop Authentication
- [ ] Remote Desktop/Terminal Services
- [ ] SSH Terminal Access
- [ ] Online Learning Tools
- [ ] Workgroup/Collaboration Software (Sharepoint, Wiki, Vibe, etc)
- [ ] Website/CMS
- [ ] Google Apps
- [ ] Cloud Applications
- [ ] Other

Describe any list services used by your system
Describe any Anti-Virus/Anti-Spam services used by your system

Describe any custom applications that interact with or depend on email/calendar data

Describe any special handling for 3rd party services/products, custom applications, or outside partners

What Services/Protocols does your system support?

- Web Interface
- IMAP
- POP
- MAPI
- CalDAV
- CardDAV
- LDAP Address Books
- Unix-Based Mail Spools/Files
- Other

What platforms does your system support?

- Windows
## Approximately what proportion of your customers access mail/calendar via the following clients?

<table>
<thead>
<tr>
<th>Client</th>
<th>None</th>
<th>Some</th>
<th>Half</th>
<th>Most</th>
<th>All</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web Interface</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Outlook/Entourage</td>
<td></td>
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<tr>
<td>Thunderbird</td>
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<td></td>
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<tr>
<td>Apple Mail/Calendar</td>
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<tr>
<td>iPhone</td>
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<td></td>
<td></td>
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<tr>
<td>Android Device</td>
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<tr>
<td>Blackberry</td>
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<tr>
<td>Groupwise</td>
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<tr>
<td>Eudora</td>
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<tr>
<td>Other</td>
<td></td>
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</tr>
</tbody>
</table>

## What version(s) of Outlook/Entourage do your customers use?

- Outlook 2013
- Outlook 2011 for Mac
- Outlook 2010
- Entourage 2008 for Mac
- Outlook 2007
- Entourage 2004 for Mac
- Outlook 2003

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If you have a specific reason to use old releases of a particular client, can you please provide information about that here

Please indicate who can perform the following tasks. If your department/division does not have one of the classes, simply leave that column blank. If you have additional classes or subsets, you will be asked to describe those later.

<table>
<thead>
<tr>
<th>Task</th>
<th>Customers</th>
<th>Help Desk Staff</th>
<th>Limited Administrators (System Support)</th>
<th>Full Service Administrators</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Provisioning</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Assign Permissions</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
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<tr>
<td>Client Setup/Support</td>
<td>☐</td>
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<td>☐</td>
<td>☐</td>
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<tr>
<td>Password Resets</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Change Delivery/Forwarding</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
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<tr>
<td>Create/Update Filters &amp; Rules</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
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<tr>
<td>View Logs</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
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<tr>
<td>Perform Backups/Restores</td>
<td>☐</td>
<td>☐</td>
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<tr>
<td>Handle Account Renames</td>
<td>☐</td>
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<tr>
<td>Delete Accounts</td>
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<tr>
<td>Lock Accounts</td>
<td>☐</td>
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<tr>
<td>Unlock Accounts</td>
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</tbody>
</table>

How many individuals comprise the following administrative groups:
Provide any other information relevant to delegated administration and support. Include information about any different administrative classes or subsets of the administrative groups from the previous question you may have.

Please provide any additional information you feel is important for us to know about your email/calendar system

Thank you for your participation in helping us understand your current email system. Based on the information you've provided, we may have additional questions or need clarification. If so, please expect us to contact you. We will also contact you soon to discuss your migration needs, what your team can do to expedite a smooth transition, what tools can assist in the migration, and when a migration might be optimally scheduled for you and your team.

Check the box below to confirm completion of the survey. Once you submit the survey, it will be closed from future edits.

☐ This survey is complete.