Email & Calendaring: Campus Transition to Microsoft Office 365

Why are we doing this?

- As an institution, we have an over-arching goal to direct as many resources as possible to mission-related activities.
- An enterprise email and calendar system is basic infrastructure that can produce significant savings by reducing redundant email hardware and licensing fees, and via productivity gains from streamlined calendaring processes.
  - A conservative estimate of these combined savings is more than $30 million over five years.
- Striving for efficiencies in core processes is imperative for demonstrating our commitment to resource stewardship.
- We also want to bring forward the best experience for everyone on campus through improved functionality and connectivity.

Solution:

- Of the many solutions evaluated, Microsoft Office 365 was selected as the system which would best meet campus requirements.
- Why Office 365? A key requirement to support our federal grants was a guarantee for on-shore data storage. Microsoft was willing to sign an agreement to honor that requirement. Google, the other prime contender, would not.
- Office 365 is a cloud-based service that DoIT will manage on behalf of the campus. The UW’s initial release will include email and calendar only. Additional features—such as Lync, SharePoint and SkyDrive—may be added later.

Best Experience:

In order to best position your organization for campus calendar interoperability, integration with cloud services (current and future), maximum long-term savings and compliance with campus standards, your department may need to upgrade software and equipment to migrate to Office 365. Note that there is no cost to units for the basic Office 365 email (50GB max mailbox per user) and calendar service.

Office 365 is a robust and flexible tool, but for the best experience and maximum long-term gains the project team recommends the following:

- Use of Microsoft clients (Outlook 2010 or 2013 or Outlook Web App for Windows; Outlook 2011 or Outlook Web App for Mac)
  - It may be beneficial for some units to start using Outlook prior to the transition to allow end users to become familiar with the client.
- Upgrade all of your Windows XP users to a more recent version of Windows. Microsoft support for Windows XP ends in April 2014.
- Adopt the new firstname.lastname@wisc.edu email name standard as the primary address for all personnel in your department
  - Standardizes addresses across campus; aligns with a single brand, provides consistency and continuity
  - Eliminates the need to use NetID as an email address
Timeline:
- **October 31 – November 22, 2013:** Office 365 preview for campus email administrators / Migration Partners
- **January 2014:** Early adopters will begin the transition to Office 365 (Includes Chancellor’s office, Provost’s Office, Office of VCFA, DoIT and others)
- **Summer 2014:** The remainder of campus begins the transition to Office 365

### Migration Expectations of Your Department’s Team:
- Designated Migration Partner and leadership participation to communicate technology and policy decisions within unit
- Identify and communicate training needs to the Office 365 team
- Monitor unit and user readiness; complete all steps in Readiness Checklist

### Post-Migration:
Departments may continue to have delegated administration capabilities after migration for:
- Management of local email client
- User support
- Administrative access to Office 365

Or, departments may take advantage of DoIT’s centralized administration and support to fully manage Office 365 services.

### Migration Details You Should Be Aware Of:
- Calendar data will not be migrated – there is simply no good way to do this with the level of accuracy we want. All users will need to re-create their events. Project staff will be available to assist as needed.
  - WiscCal users can create a read-only copy of their calendars. A solution for non-WiscMail systems will need to be worked out with the local department administrators.
  - Individuals (with the assistance of their department IT staff) are responsible for their own record retention.
- With the exception of messages larger than 25 MB, all email data will be migrated, including saved messages, attachments and folders. (Guidance will be provided for handling larger messages.)

### Transitioning Accounts:
As a part of the transition to Office 365, you will be asked to make policy decisions about your staff’s email accounts that will have an impact on your technology infrastructure and administration.
- Users with multiple email accounts will be encouraged to consolidate to one.
- Consolidating accounts also means calendars – and will impact other services, including WiscChat, Google Apps, and list subscriptions.
- All users will be required to set a primary address.
  - Mail and calendar invitations will continue to be received via all current email addresses.
  - Sent mail and calendar invitations will reflect the primary address.
- New firstname.lastname@wisc.edu addresses will be available for all individuals and can be set as their primary address.
- Note: This change is for email only – not your web site. Your unit URL can and will continue to be departmentname.wisc.edu.

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