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

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 about migration needs so that we better understand your current email system and begin to prepare the tools and resources necessary for a successful transition to Office365. The campus migration to Office 365 will be phased, with the first group of early adopters slated to begin in 2013.

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

The Business Needs analysis was completed before the selection and purchase of Microsoft Office 365. A document describing the business case and decision to implement Office 365 is available as a link from this site: http://www.365transition.wisc.edu/overview/
Feedback can be provided to the AE team at aefeedback@vc.wisc.edu.

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 for which you are the IT contact

UDDS (Unit, Division, Department, Subdepartment) for the department above. This is not to be confused with the UDDS of the person responding, but could be the same. This information assists us in organizing the email system data.

Primary Administrative Contact who would delegate work assignments (the person who allots staff time for any work necessary to assist with Office 365 and its planning/migration)

Primary Technical Contact Primary Technical Contact (the person who best understands the email system, email volumes, what email clients are being used, attachment sizes, etc.)

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)
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Does your system offer the following:  

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Off Campus Access</td>
<td></td>
<td></td>
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<tr>
<td>Mobile Device Access</td>
<td></td>
<td></td>
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<tr>
<td>Data Encryption</td>
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</tbody>
</table>

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
- 500 MB - 4.25 GB
- 4.25 GB - 6.25 GB
- 6.25 GB - 25 GB
- More than 25 GB

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
What platforms does your system support?

- Windows
- Mac OS
- Linux/Unix
- iOS
- Android
- Blackberry
- Windows Mobile
- Other

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>
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<td></td>
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<tr>
<td>Outlook/Entourage</td>
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<tr>
<td>Thunderbird</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>
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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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</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
- [ ] Entourage X
- [ ] Entourage 2001
- [ ] Outlook 2000
- [ ] Other

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

<table>
<thead>
<tr>
<th></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>
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<tr>
<td>Assign Permissions</td>
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<tr>
<td>Client Setup/Support</td>
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<tr>
<td>Password Resets</td>
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</tr>
<tr>
<td>Change Delivery/Forwarding</td>
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<tr>
<td>Create/Update Filters</td>
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</tbody>
</table>
How many individuals comprise the following administrative groups

- Help Desk Staff
- Limited Administrators (System Support)
- Full Service Administrators
- Other

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.