Office 365

Migration Partner
Informational Session

July 2013
Agenda

1. Introductions
2. Getting a head start on Office 365
3. How to get more information
4. Q&A
Introductions

Office 365 at UW-Madison

http://365transition.wisc.edu
Office 365 Executive Committee

Bruce Maas
Vice Provost for IT and CIO

John Krogman
Chief Operating Officer (DoIT)

Alice Gustafson
Administrative Process Redesign

Rhonda Davis
School of Veterinary Medicine
AE Email & Calendaring Consolidation: Goal Statement

Identify a single email and calendaring platform for the UW-Madison community (including faculty, staff, and students) that meets the broad needs of the University. Identify the system, quantify the investment required and efficiencies anticipated, and determine service levels and policies that would govern the administration and use of the new system.
While the team’s charge was to find one solution for campus, seven possible scenarios were initially considered:

<table>
<thead>
<tr>
<th>Scenario (#systems)</th>
<th>Population</th>
<th>Assessment</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Faculty/Staff</strong></td>
<td><strong>Students</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A (1) WiscMail+/ WiscCal+</td>
<td>WiscMail+/ WiscCal+</td>
<td>×</td>
<td>Operating cost significantly higher than cloud-based systems ($13.5M vs. $8.1-8.3M over 5 years)</td>
</tr>
<tr>
<td>B (1) Microsoft Office 365</td>
<td>Microsoft Office 365</td>
<td>✓</td>
<td>Approved for further consideration</td>
</tr>
<tr>
<td>C (1) Google Mail and Calendar</td>
<td>Google Mail and Calendar</td>
<td>✓</td>
<td>Approved for further consideration</td>
</tr>
<tr>
<td>D (2) WiscMail+ / WiscCal+</td>
<td>Either Google Mail and Calendar or Microsoft Office 365</td>
<td>×</td>
<td>Data from the use case survey did not suggest any key differences that would require a separate system</td>
</tr>
<tr>
<td>E (2) Either Microsoft Office 365 or Google Mail and Calendar</td>
<td>Opposite</td>
<td></td>
<td></td>
</tr>
<tr>
<td>F (1) Microsoft Office 365 or Google Mail and Calendar or WiscMail+ / WiscCal+</td>
<td>Students provide their own email address</td>
<td>×</td>
<td>High value placed on wisc.edu email identity and a large number of student employees that would need to be on the University system</td>
</tr>
<tr>
<td>G (2) Both Microsoft Office 365 and Google Mail and Calendar (Choice)</td>
<td>Either Microsoft Office 365 or Google Mail and Calendar</td>
<td>✓</td>
<td>Approved for further consideration</td>
</tr>
</tbody>
</table>
AE Email & Calendaring Consolidation: Remaining Scenarios

The team proceeded to evaluate three remaining scenarios. Discussions were held with both Microsoft and Google to review requirements and key considerations.

<table>
<thead>
<tr>
<th>Microsoft Office 365</th>
<th>Google Mail &amp; Calendar</th>
<th>Dual Solution</th>
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</thead>
<tbody>
<tr>
<td>• Will provide a business associate agreement (BAA) for HIPAA</td>
<td>• Brand enjoys significant popularity among campus populations including research community</td>
<td>• Solution would likely provide the least resistance to adoption</td>
</tr>
<tr>
<td>• Will ensure domestic data storage to meet U.S. export control regulations</td>
<td>• Google Apps suite is already available to campus</td>
<td>• Solution would provide more flexibility as email/calendaring evolves and becomes integrated with other collaborative tools</td>
</tr>
<tr>
<td>• Robust out-of-box delegated administration capabilities</td>
<td></td>
<td></td>
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<tr>
<td>• One-third of known distributed systems are already using Microsoft Exchange</td>
<td></td>
<td></td>
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<tr>
<td>• Brand does not resonate as well as Google with certain faculty</td>
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</table>

Summary

✓ **Office 365 offers the best match for UW Madison’s functional, technical, and legal requirements**

✗ **Google Mail & Calendar would not be able to be adopted by the entire campus – maximum efficiencies and cost savings not possible**

✗ **The requisite effort associated with a dual solution would outweigh the benefits**

The AE team recommends Office 365 as UW-Madison’s single email & calendaring system, with the Google Apps suite remaining available to all of campus.
# AE Email & Calendaring Consolidation: Financial Impact of Proposed Solution

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<tbody>
<tr>
<td><strong>Migration Costs</strong></td>
<td>~$663K</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>Recurring Costs</strong></td>
<td>$1.7M</td>
<td>$1.7M</td>
<td>$1.7M</td>
<td>$1.7M</td>
<td>$1.7M</td>
</tr>
<tr>
<td><strong>Recurring Savings</strong></td>
<td>$8.4M</td>
<td>$8.4M</td>
<td>$8.4M</td>
<td>$8.4M</td>
<td>$8.4M</td>
</tr>
<tr>
<td><strong>NET SAVINGS</strong></td>
<td>$6.1M</td>
<td>$6.7M</td>
<td>$6.7M</td>
<td>$6.7M</td>
<td>$6.7M</td>
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### Savings:

Operating cost avoidance associated with narrowing ~35+ systems to one (~$2.3M)
- Reduced spend on servers, software licenses, spam, and virus protection
- Labor savings in the areas of system administration, software development, and hardware maintenance

Workforce efficiency through a single calendaring solution (~$6.1M)
- Campus-wide adoption of Office 365 would drastically reduce the time spent on scheduling and confirming meetings

### Costs:

- Cost of migration is based on estimates provided by DoIT; includes training
- Recurring costs assumes distributed systems would be eliminated; assumes administrators in distributed units would spend 15 percent of their time supporting email & calendaring users

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**Preliminary 5 year financial impact estimate**= ~$11M of savings in operating costs; ~$30.5M of savings in workforce efficiency.
Scott Gletty-Syoen

Service Delivery Team Lead
Service Delivery Team

Chris Holsman
Office 365 Business Process owner (DoIT)

Scott Gletty-Syoen
Service Delivery Team Lead

Ara Mesdjian
Documentation/Training Team

Shannon Trine
Organizational Readiness/Training

Jennifer Sutherland
Migration Coordinator

Ryan Hansen
User Services

Dave Karnowski
Technical Team
Why an informational session?

1. Raise awareness
2. Provide plenty of lead time for department prep
3. Avoid any last-minute surprises
Getting a head start with Office 365

Steps that migration partners can start taking now to prepare your organization for Office 365

1. Office 365 client compatibility
2. SMTP relaying
3. Office 365 data size limits
Getting a head start with Office 365

Greater knowledge of how to get help with the Office 365 transition

Office 365 transition website
365transition.wisc.edu

Help Desk
helpdesk.wisc.edu  608-264-4357
Ara Mesdjian

Documentation/Training Team
Choosing an Office 365 client

For most users, the Outlook clients will present the best user experience.

Heavy calendar users will want to be on Outlook.
Choosing an Office 365 client

Client Comparison Grid:

https://kb.wisc.edu/office365/page.php?id=28438
SMTP Relaying

https://kb.wisc.edu/page.php?id=29362
Office 365 Data Size Limits

25MB per message

25GB per mailbox

http://kb.wisc.edu/page.php?id=27922
http://helpdesk.wisc.edu
help@doit.wisc.edu
608-264-4357

365transition.wisc.edu