



# AE Office 365 Project Decision Document

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## Decision Required

Should Lync be deployed, and if so, what type of deployment should be pursued, and when?

**Requirements:** Approved scope for the Office 365 project team is Exchange Online (email and calendar). Lync is explicitly out of scope. Project principles state that other features of Office 365 should only be considered if they are critical to the success of the email and calendar deployment.

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## Current Status

The primary instant messaging system on campus is WiscChat, which has around 1500 active users in multiple domains (WiscMail Plus). The service is primarily used by "netid@wisc.edu" users, but also used by WiscMail Plus domains - "joe.user@dept.wisc.edu". There are an unknown number of departmentally run instant messaging services, and there are some departments whose users use consumer instant messaging services such as Google, Facebook, Yahoo, AOL, MSN, or Skype. Instant messaging is critical infrastructure for DoIT, Enrollment Management, Library, CALS, Admissions, Ice Cube research project, various courses, and other project teams and departments (whose users are logging in with their WiscMail addresses and are hard to trace.)

WiscChat, and probably most departmentally run instant messaging services use XMPP because it is the standard instant messaging protocol that allows users in one organization to chat with users in other organizations (AKA: XMPP federation). There are many people on campus who collaborate with people on other campuses, so the XMPP protocol is the key enabling technology for instant messaging federation.

There is currently no mandate that everyone on campus use a single instant messaging service. Part of this decision may involve defining the business need for issuing such mandate. The benefit to everyone using the same service and set of clients would be improved communication and collaboration across campus. However, if Lync does not meet individual requirements for instant messaging, then such a mandate would not be well received.

These are the WiscChat features that Lync support:

- Instant messaging
- Presence management (availability, photo, location, etc)
- File transfer
- Voice and video capabilities

These are the enhanced capabilities that Lync offers above WiscChat:

- Improved voice and video chat using Lync desktop client
- Screen sharing, web meetings, conference calls
- Ad-hoc multi-user conversations
- Integration with email/calendar web client
- VOIP, call routing (see below: requires on-prem Lync, or A4 licensing)

Reasons why the transition to Lync could incline users who are using campus-run IM services to find alternative instant messaging solutions:

- Lack of XMPP federation. This would prevent staff and faculty researchers from collaborating with peers in other organizations.
- Lack of persistent and configurable group chats. Working teams depend heavily on the availability of persistent group chat rooms that have moderation, logging and other advanced capabilities.
- Client restrictions. Lync only supports one client on Windows and Mac in addition to the web client.

Reasons why Lync would not get buy-in from users who are currently using consumer IM services:

- Lack of federation to private IM services. This would prevent users from collaborating with peers using AOL, Google, Yahoo, Facebook, Skype, MSN, etc.
- Lack of VOIP compatibility with telephone networks. People may be using Skype or Google Talk to make and receive telephone calls.

The key decisions to be made are:

- Which, if any, type of Lync deployment meets the business needs for instant messaging on campus?
- Should Lync be deployed during the initial rollout of Office365, or after?

These are the key differences between Lync On-Premises and Lync Online.

- VOIP capabilities in Lync Online require A4 licenses; Lync On-Premises requires server licensing.
- Persistent chat rooms aren't supported in Lync Online; Lync On-Premises supports persistent chat rooms.
- XMPP federation is not supported in Lync Online; Lync On-Premises supports XMPP federation.
- The local infrastructure required for Lync Online is ADFS; Lync On-Premises does not require ADFS, but does require infrastructure for Lync itself.
- Federation with many consumer IM networks is not possible with Lync Online; Lync On-Premises supports federation with more networks.

According to Gartner, Lync 2013 will introduce key features. Presumably, some of these features would be rolled into Lync Online:

- Persistent group chat capabilities in On-Premises Lync are better integrated with the Lync client.
- On-Premises Lync has improved video conferencing and VOIP capabilities
- Skype integration.
- Windows 8 and Office 2013 integration
- Better management capabilities.

There are groups within the university that wish to evaluate Lync's suitability as an enterprise VOIP solution within 2 years:

- VOIP with Lync Online will require negotiating for A4 licenses (which we haven't done).
- VOIP with Lync On-Premises would presumably require licensing the software.
- Lync has built-in voice chat that isn't compatible with the phone system, but doesn't require additional licensing and works with both Lync Online and Lync On-Premises

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## Options

### Option 1:

Do not deploy Lync immediately; reevaluate Lync deployment after Office365 email and calendar transition is well under way. At that time, a decision can be made about a new initiative to deploy Lync.

### Option 2:

Deploy Lync 2013 On-Premises to take full advantage of Lync's federation, group chat, administration, and VOIP

feature set.

**Option 3:**

Deploy Lync Online to take advantage of the presumed feature set that will be provided by Office 365. Keep some level of local instant messaging infrastructure to cover the feature gap during transitional period.

<b>Analysis Criteria</b>			
<b>Criteria</b>	<b>Option 1</b>	<b>Option 2</b>	<b>Option 3</b>
Assumptions	<ul style="list-style-type: none"> <li>Assumes existing WiscChat XMPP features/use-cases are important features</li> </ul>	<ul style="list-style-type: none"> <li>Assumes group chat, federation and VOIP are immediate priorities</li> <li>Assumes willingness to support local infrastructure</li> <li>Assumes all of these on-prem Lync features work with cloud OWA</li> <li>Assumes Lync On-prem is a suitable replacement for WiscChat</li> <li>Assumes Lync 2013 is available</li> </ul>	<ul style="list-style-type: none"> <li>Assumes group chat, federation and VOIP are not immediate priorities</li> <li>Assumes desire to not have local infrastructure</li> <li>Assumes Lync Online is a suitable replacement for WiscChat</li> <li>Assumes ADFS single sign on infrastructure is deployed</li> </ul>
Constraints	<ul style="list-style-type: none"> <li>WiscChat will need to support changes in provisioning design introduced by Office365 (single OU vs multiple OUs)</li> <li>WiscChat infrastructure will need to be maintained</li> </ul>	<ul style="list-style-type: none"> <li>Proof of concept would need to be performed to gauge capabilities of Lync On-prem</li> </ul>	<ul style="list-style-type: none"> <li>ADFS infrastructure would need to be deployed to support Lync desktop client</li> <li>Some anticipated features of Lync Online might not be available right away</li> </ul>
Pros/Benefits	<ul style="list-style-type: none"> <li>No loss of functionality for existing WiscChat users</li> <li>During the transition to O365, users will be able to chat with each other</li> <li>Gives Lync time to mature its feature set</li> <li>ADFS and/or Lync On-premises deployments can be deferred</li> <li>Frees staff resources to focus on email and calendar transition</li> </ul>	<ul style="list-style-type: none"> <li>We'll get some of the capabilities of WiscChat (group chat, federation) that Lync Online wouldn't</li> </ul>	<ul style="list-style-type: none"> <li>Cheaper, faster</li> <li>Less infrastructure</li> <li>Part of O365 suite</li> <li>Integration with email/calendar provides better user experience</li> </ul>
Cons/Risks	<ul style="list-style-type: none"> <li>Users may be disappointed that Lync features are not part of initial Office 365 deployment</li> <li>Staff/budget for maintaining WiscChat infrastructure</li> <li>Will require changes to current WiscChat to support the O365 provisioning model (single OU vs multiple OUs)</li> </ul>	<ul style="list-style-type: none"> <li>Cost and time involved with developing and maintaining local Lync and POTS (telephone) infrastructure</li> <li>User acceptance issues for transitioning from WiscChat to Lync</li> <li>Lack of interoperability during the O365 transition</li> <li>Additional licensing for Lync 2013 may be required</li> </ul>	<ul style="list-style-type: none"> <li>Cost and time involved with developing and maintaining local ADFS infrastructure</li> <li>User acceptance issues for transitioning from WiscChat to Lync</li> <li>Lack of interoperability during the O365 transition</li> <li>Requires A4 licenses for VOIP in Lync Online</li> <li>No group chat or federation</li> </ul>

Impact to Budget	<ul style="list-style-type: none"> <li>Minimal - WiscChat development and continued support</li> </ul>	<ul style="list-style-type: none"> <li>Major - Development and maintenance of local Lync infrastructure</li> </ul>	<ul style="list-style-type: none"> <li>Moderate - ADFS infrastructure development and maintenance</li> <li>Moderate – Additional training for Lync</li> </ul>
Impact to Timeline	<ul style="list-style-type: none"> <li>Minimal – minor change to existing service</li> </ul>	<ul style="list-style-type: none"> <li>Major – Lync (and POTS) infrastructure</li> </ul>	<ul style="list-style-type: none"> <li>Moderate – ADFS infrastructure deployment might cause delays</li> </ul>
Impact to Support Teams	<ul style="list-style-type: none"> <li>Minimal – no immediate change to existing service</li> </ul>	<ul style="list-style-type: none"> <li>Moderate – conversion from WiscChat to Lync</li> <li>Moderate – support for Lync</li> </ul>	<ul style="list-style-type: none"> <li>Moderate – conversion from WiscChat to Lync</li> <li>Moderate – support for Lync</li> </ul>
Impact to Users	<ul style="list-style-type: none"> <li>Minimal – users who use WiscChat</li> <li>Moderate - users who want an integrated web mail-chat client</li> <li>Major – users who use departmental chat may migrate twice</li> </ul>	<ul style="list-style-type: none"> <li>Moderate – Current WiscChat users will lose some features and will need to use a new chat client</li> <li>Major – users who use Linux</li> </ul>	<ul style="list-style-type: none"> <li>Major – Current WiscChat users will lose many features and will need to use a new chat client</li> <li>Major – users who use Linux</li> </ul>

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## Project Team Recommendation

Assuming the primary concern is a successful deployment of Office 365 email and calendaring AND that VOIP isn't a primary concern, the Office 365 Project Team recommends:

### Option 1:

Do not deploy Lync immediately; reevaluate Lync deployment after Office365 email and calendar transition is well under way. At that time, a decision can be made about a new initiative to deploy Lync.

If a short term VOIP deployment is a primary concern, then Option 2 is the only currently available option. There are significant feature gaps in the Lync Online offering, so it is important that WiscChat remain available to users throughout the Office365 transition. If Lync's feature set has not evolved to meet all of the needs of campus after the Office365 transition is well under way, the team should consider other long term instant messaging solutions.

### Technical Advisory Group Comments:

Attention should be given to proactive communication to manage user expectations. AE Sponsors should start planning for future deployment of Lync.

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## Final Decision

### Option 1:

Do not deploy Lync immediately; reevaluate Lync deployment after Office365 email and calendar transition is well under way. At that time, a decision can be made about a new initiative to deploy Lync.

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## Signatures

<i>Approver</i>	<i>Title</i>	<i>Signature</i>	<i>Date</i>
Bruce Maas	Vice Provost IT, CIO		
Alice Gustafson	Director AE, VCO		
John Krogman	COO, DoIT		
Rhonda Davis	AE: SVM		