

# About Messaging Architects

Discover your data wherever it resides through smart search and eDiscovery tools that connect to multiple platforms including Microsoft Exchange/O365, Box, Citrix ShareFile, file systems, Google, Amazon, and GroupWise. Sanitize any sensitive data to ensure compliance with HIPAA/HITECH, PCI, and any state PII regulations. Reduce costs by consolidating legacy archive systems, PST backups, and old mail systems into low cost archive storage in the cloud or on premise. Messaging Architects are your Information Governance and Information transformation experts providing Services and tools to help companies transition their data from on premise or to/between any public cloud collaboration services. For more information, visit [www.messagingarchitects.com](http://www.messagingarchitects.com)

# MIGRATION GUIDE



Migrate from any version of Exchange, GroupWise, or Gmail to Office 365

**Messaging Architects**

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# What's in Your Email Migration Guide

## Section 1: Six Steps to Success ..... 7

So you're migrating your organization's email to Office 365. A little intimidated? Good. That's the right mindset because a migration to the cloud with Office 365 is likely to be one of the most important and visible IT projects you'll handle all year. By following the six steps in this section, you'll discover why a detailed project plan is key to ensuring a successful migration.

## Section 2: Choose Your Migration Path.....21

Deciding on the best migration path to Office 365 can be confusing. In this section, we'll provide some general guidelines on how to select the best migration path based on your current email system, such as how quickly you want to migrate to Office 365.

## Section 3: Hybrid On Premise / Office 365 Considerations ..... 29

When an organization migrates its email and collaboration system to Microsoft Office 365, one of the key questions often asked is how can I back up and restore my data in a cloud environment? Unfortunately, there aren't as many options for backing up and restoring your data as you may think. So before migrating to Office 365, it is critical to understand the reasons why you may want a secure backup of your data and know the options available to you.



## Section 4: How Messaging Architects Can Help Ensure a Smoother Migration.....

We know that an email migration to the Cloud can be a complicated project with the potential for sky-rocketing project costs, lost data, and reduced productivity. So do it right the first time. Messaging Architects has the expertise and tools to migrate from Exchange to Office 365, GroupWise to Office 365, and Gmail to Office 365. We can also migrate between Office 365 tenants.

## Section 5: Your Office 365 Email Communication Plan.....41

If you're going to talk the talk, you've got to walk the walk. Discover why clear communication is critical to the success of your migration. Spot the migration champions in your organization, then decide what needs to be communicated, establish a communication timeline, and learn how to create fun activities to facilitate communication. To make it simple, we've included ready-to-use email communication templates and migration surveys in this section.

*Pre-migration tips and cheat sheets*



*Cool ideas for motivating everyone in your organization*



*End-user help and training*

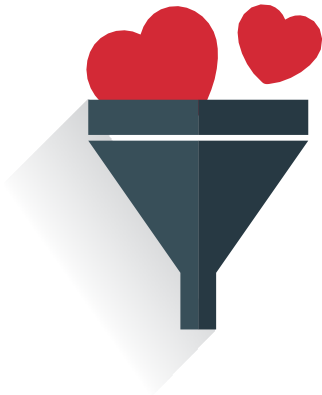






## CAPTURE

Archive email, future and re-occurring calendar events, notes, personal address books, proxy rights, Personal Archives and PSTs.



## CLEANSE

Detect, correct or remove incomplete, corrupt, or duplicate records. Verify the accuracy of legacy data.



## CONSOLIDATE

Consolidate email platforms, archives, legacy archive systems, AD and Personal Archives in a centralized archive repository and streamlines storage space.



## MIGRATE

Migrate the data to the new system to achieve accurate, clean and error free data.



SECTION 1

# 6 Steps to Success





# Migrating to Office 365

A migration to the cloud with Office 365 is likely to be one of the most important and visible IT projects you'll handle all year. You know this project requires serious planning and preparation. The key is the right planning and preparation.

We've got you covered. Using Messaging Architects, and following the steps detailed in this toolkit, you'll get your organization safely through the process. In fact, you'll come out looking like a hero.

**Ready to be a hero? Let's get started.**

## Take advantage of our experience

We've used our migration approach to successfully migrate millions of users. This experience has helped us narrow down the six crucial steps to a successful email migration:

**Step 1:** Migration Project Assessment, Planning and Design

**Step 2:** Collecting Data in Your Existing System

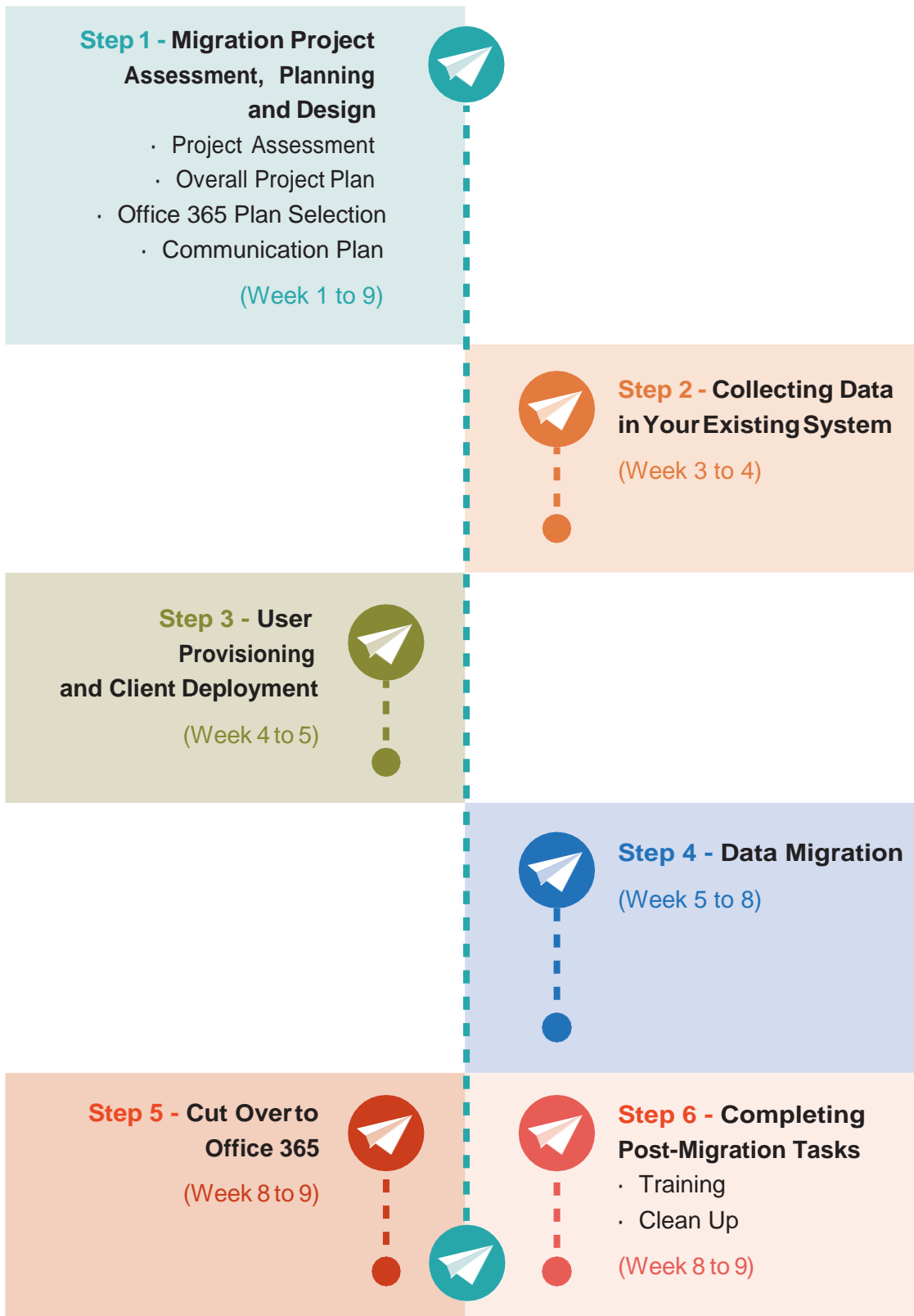
**Step 3:** User Provisioning and Client Deployment

**Step 4:** Data Migration

**Step 5:** Cut Over to Office 365

**Step 6:** Completing Post-Migration Tasks

# 6 Step Migration





# Step 1: Migration Project Assessment, Planning and Design

## Project Assessment

Don't start your migration project without having a clear and realistic picture of what the project actually entails. What resources do you already have? What resources will you need? How much time will it take to complete the project? Keep these points in mind:

- **Teamwork:** Having a well-rounded team brings much more insight into the overall migration project. Create a team with members from various backgrounds of expertise to ensure that no steps or issues are overlooked. When assembling your team, think about including the IT administrator, the IT director, a communications liaison, and a member of your operations team. Select an enthusiastic project manager who will help lead your team and champion the project throughout the migration timeline.
- **Discovery:** Coordinate a migration project team meeting to discuss the project in detail and outline the resource assessments. Get specific. For example, establish exactly how many domains, post offices or mail stores, users, and mailboxes exist; how much data is stored in those mailboxes; how much data is archived; how much storage is used; what is contained within the network, etc.
- **Infrastructure:** When you have a very clear understanding of your email infrastructure, you can determine what, if any, additional system requirements you need in order to move ahead with the migration. This gives you an accurate idea of what the project will entail, and help you avoid the problem of setting unrealistic expectations for how long the migration will take.

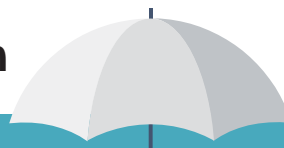
## Overall Project Plan

After the project assessment, you're ready to move on to the overall project plan. Here are the key questions:

- What are your business requirements? (Disaster Recovery, Compliance, etc.)
- How much data do you want to inject into the Office 365 system?
- How much data do you want to inject directly into the Office 365 Archive folder?
- What data do you need to migrate (mail, appointments, address books, etc.)?
- When do you want to migrate users (certain times, days, weeks, months)?  
Can you afford any downtime?
- Are there compliance issues to consider? Do you need to review old and/or establish new email retention policies?

## Office 365 Plan Selection

You also need to plan what services and features you will use with your Office 365 subscription. If you are a small to medium sized business (1-300 users), you could pick from the Office 365 Business, Office 365 Business Essentials, or the Office 365 Business Premium plan. If you are a larger enterprise, there are additional plans (such as E1, ProPlus, E3 or E5) to consider or if you are a non-profit organization, there are specific plans you might be interested in. The good news is that you can expand your Office 365 service as your business grows. Use the information you gathered from your resource assessments to help determine what Office 365 plan works best for your organization.



### Attachment-less Migrations

With Messaging Architects, you can migrate to Office 365 without migrating email attachments. Prevent the loss of valuable information during your migration by stripping attachments from messages and replacing each attachment with an HTTP link.

From there, you can finalize the overall implementation plan. How and when will you implement your archiving and migration solutions and new email platform? You can also start to define your migration methodology, including procedures, alternative options, and/or possible troubleshooting techniques.

## Information Governance

The content of your systems and information Governance is not only for data at rest and should be a factor when planning your data migration.

Is there information that is to be migrated which could compromise your organization?

Do you wish to simply migrate all data to the target system and deal with the content there?

Are there requirements such as a financial merger that dictates that the content must be cleansed or not migrated?

Messaging Architects has the tools and ability to filter out sensitive or restricted information prior to migration thereby ensuring a clean and compliant target system.

## Communication Plan

It is important to create a comprehensive communication plan to keep all users affected by the email migration — including executive management, the project team, and users up-to-date on the project's progress.

The communication plan should include the following information:

- An outline of the migration plan, including how and when it will be carried out
- Any issues that the organization might encounter during the migration process
- Migration status updates via email throughout the migration process
- Any pre-migration and/or post-migration tasks users may have to complete

**NOTE:** A complete **Communication Plan** is included in **Section 5** of this document.

# Step 2: Collecting Data in Your Existing System

To handle the problem of PSTs, we've developed a toolkit for identifying, collecting, cataloging, and processing personal archives:

Phase	Description
<b>Identify</b>	This phase scans each database to provide you with a report on the actual defined location of the current archive for each user in the organization. This is a quick and easy method for determining which archives are stored on network devices and which archives are stored on local storage media.
<b>Collect</b>	This phase includes moving all personal archives located on local storage media to a network device for processing. Once these individual users have been identified, we scan local workstations for personal archive databases and automatically move these databases to a designated network storage device for processing. This tool can be deployed remotely to these target workstations using login scripts or other software distribution mechanisms.
<b>Catalog</b>	This phase includes a pre-scanning tool which scans each server and subdirectory to search and identify all personal archives located on that server. The tool provides an XML catalog of all personal archives which can then be read by Messaging Architects to automatically process personal archives without having to consolidate files onto a single server or having to parse through each subfolder on the server.

Phase	Description
<b>Process</b>	The final phase is performed once the archives have been moved to the network and all archives cataloged after which they can be processed automatically by Messaging Architects and converted to XML data in a centralized repository. This then makes that data fully accessible to email clients, preserves the ability to search and maintain the data in accordance with state records retention regulations, and allows that data to be migrated into Office 365.



# Step 3: User Provisioning and Client Deployment

## User Provisioning

Before you can migrate data to the Office 365 system, you need to first provision your users in Azure Active Directory and select the appropriate licensing option to mail-enable them for the new email platform. This lets users access their existing mail, future and recurring appointments, tasks, notes, calendars, and personal address books once they've been moved to the new system. If you want, system administrators can also migrate the system address book, distribution lists, proxy rights, and more.

## Why We're Better

Messaging Architect's high-fidelity migration approach is based on the concept of segregating the migration into its two components; data migration and user migration and handling them as individual tasks . This results in minimal disruption for the users themselves by ensuring that data migration is completed and validated first.

Many other migration solutions simply transfer all the data directly to the cloud along with the user account. Not only does this approach cause disruption to your business communications, but it also takes much longer to migrate your users and could conceivably result in users temporarily existing in two systems. Why is this bad? It introduces unnecessary complexity to the migration project, including having to deal with problems with directory, mail flow, routing, and calendar free/busy synchronization between the two systems.

## Client Deployment

With the Office 365 Software as a Service ( SaaS) solution, there is no on-premise Exchange infrastructure to setup or deploy and minimal supporting infrastructure. All you will need to install on premises is the Microsoft DirSync server and optionally the federated services offering from Microsoft. Ensure that your IT staff is equipped with adequate Office 365 system training so they have the knowledge to troubleshoot issues and handle future user problems and/or questions. Once all of the components are in place, validate the authentication, settings and client access.

When you are confident that any and all issues that may have come up during the testing and validation phases have been resolved, you can sign off on your Office 365 setup and look towards your Migration..

Before going live with your Office 365 system, you need to deploy the Outlook client on users' workstations. For large organizations, it may be more practical to use a third-party tool (such as Microsoft System Center Configuration Manager) to automatically push the client to all workstations rather than to manually deploy it on each workstation although for smaller organizations, the client can be installed through Group Policy Objects or simply having the client install from the Office 365 web portal and allow O365 to maintain client updates.

## Step 4: Data Migration

After all user accounts have been created and mail enabled, you can begin the migration process. The process you use will depend largely upon the source system you are currently using and the size of your current system. Be aware that while there are many methods for copying messages from one system to another, there are also many variations on the amount of user impact and the transparency of features that migrate.

# Step 5: Cut Over to Office 365

While later versions of on-premise Exchange allow organizations to live and operate in both systems as a hybrid coexistence implementation, all coexistence has its limitations and therefore, the goal should be to avoid coexistence where possible and transition users over to the new Office 365 system as quickly and as uniformly as possible so that all users can extoll the benefits of peer to peer collaboration and communications.

Messaging Architects generally employs methods that will transition the old system to the new system quickly and thus ensure business continuity without the threat of prolonged system downtime or danger of lost messages.

# Step 6: Completing Post-Migration Tasks

After you've migrated all users and mailboxes to Office 365, there are still a few tasks to be completed to finalize your migration project. During the week following the migration, monitor your Office 365 system and run through validation procedures to make sure everything, including mail flow, appointment and task scheduling, etc., is working properly for all accounts.

## Training

A period of adjustment and training is required for all those affected by the email platform migration. Ensure that adequate training is provided for the system administrator(s) so they are comfortable administering the new Office 365 system. You should also provide training for your IT and support staff so that they can effectively respond to and resolve user issues. Of course, you need to provide all users with access to training web sites and/or documents, webinars, blogs, and any other support material that will help them transition quickly and easily to their new email client. Furthermore, if your organization is ever faced with an eDiscovery request, you need to make sure your CIO, legal counsel, operations team, and human resources department get sufficient training to be able to find any and all information relevant to the case at hand. While Office 365 has various eDiscovery features built into it depending on the plan you have selected, sometimes the default "Free" solution may not be the best practical solution for your organization and you should analyze your eDiscovery requirements to determine if these tools will simply meet your requirements or can be an instrumental and efficient solution to your actual requirements.

## Clean Up

When you are satisfied that the server mailboxes of your original messaging system have been successfully migrated, you can delete them and decommission your original servers. You can also remove your original messaging system's old client files and registry settings, and clean up the old clients on users' desktops.





SECTION 2

# Choose Your Migration Path



# Batch Migration:

According to Microsoft, “Even though cutover migration supports moving up to 2000 mailboxes, due to length of time it takes to create and migrate 2000 users, it is more reasonable to migrate 150 users or less.”

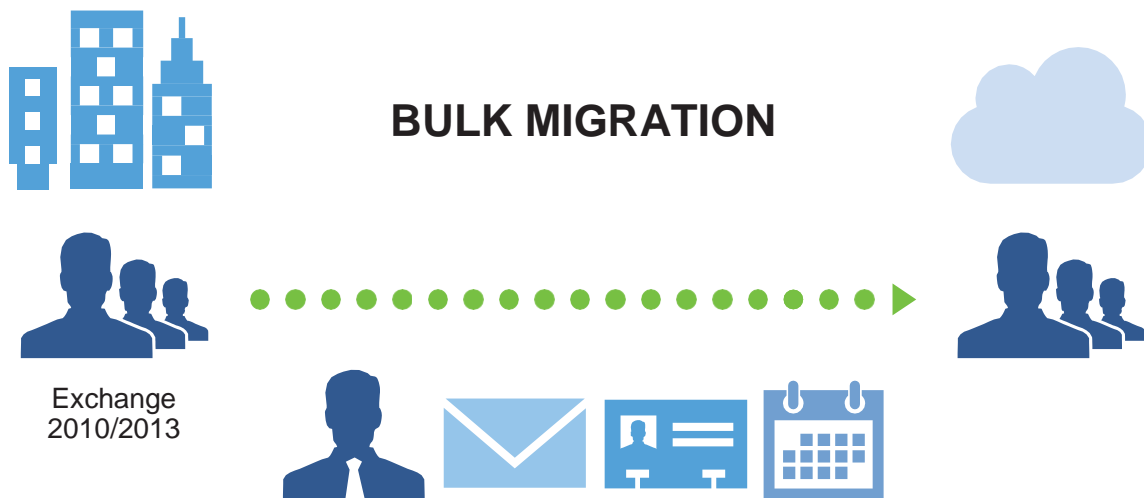
**Supported source Exchange:** 2003, 2007, 2010, 2013, 2016

**Migration duration:** One weekend

**Impact:** System shutdown for all users, Loss of Outlook mail profile along with signatures and rules.

As part of this Batch Migration process, a trusted connection is made between the current local host system and the Office 365 system. For this, certain configurations changes may be required on the local Exchange server as well as deployment of public certificates.

Once connectivity has been established and migration capabilities have been verified, the mailboxes along with their email, appointments, and contact information will be migrated to the O365 system. During this process, it is important that no new mail is introduced into the existing system so it is recommended that access to the system and all incoming new mail be halted during the migration process. This will result in a service disruption, but should be isolated to a single weekend, otherwise, a staged migration may be required.





# Staged Migration:

If you are running an older version of Exchange and have more than 2000 users, or too much data to migrate over a weekend using a Batch Migration, then you might want to consider a Staged Migration.

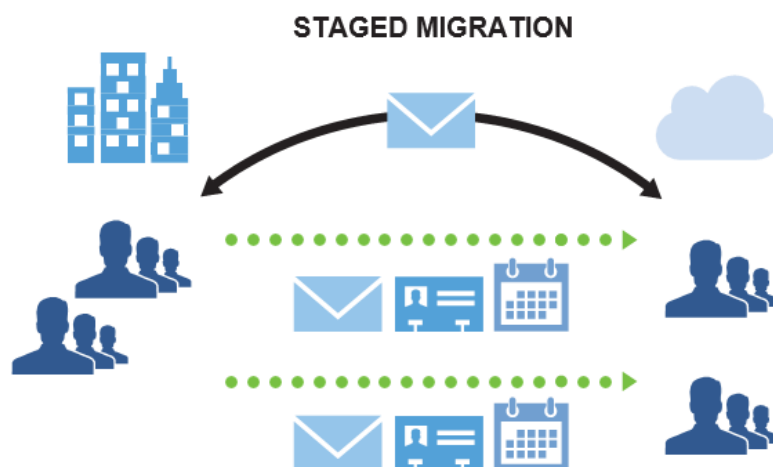
**Supported source Exchange:** 2003, 2007

**Migration duration:** As long as you want

**Impact:** Minimal, although some limitations with certain functionalities, loss of Outlook mail profile, rules and signatures

As part of the Staged Migration, users will be migrated in groups to alleviate the issues of migrating large numbers of users and data at once and causing extended disruption to users and services. For this methodology, certain configuration changes may be required on the local Exchange server as well as deployment of public certificates.

Once connections have been established between the on premise system and the O365 system, users will be migrated in smaller batches of users (up to 100 depending on mailbox sizes). Once users are migrated they can access and use the O365 system. Forwarding rules on either side will ensure that they can continue to communicate with their peers and that new email is received. During this migration transition, features such as Delegate Access and Free Busy Search will be lost. Users will also have to recreate their mail profiles which will result in loss of profile information such as client rules and



Once all accounts have successfully been migrated to the cloud, all incoming Internet email will be directed to the cloud and the local system will be ready for decommissioning.

# Hybrid Migration:

Whether you have dozens, hundreds, or thousands of users, if they are running Exchange 2010 or later, then the best way to migrate to Office 365 is to use a Hybrid Migration.

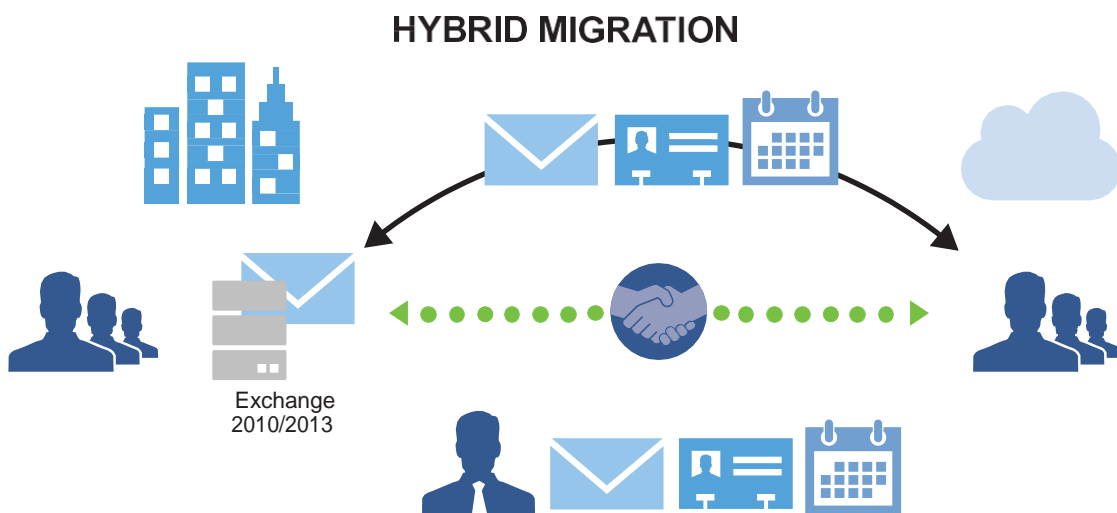
**Supported source Exchange:** 2010 or later

**Migration duration:** As long as you want

**Impact:** None, apart from restarting Outlook once your mailbox has been moved.

As part of the Hybrid Migration, both on premise systems and cloud systems will be federated and users will be moved in groups to alleviate the issues of migrating large numbers of users and data at once and causing extended disruption to users and services. For this methodology, certain configuration changes may be required on the local Exchange server as well as deployment of public certificates.

Once connections have been established and full system functionality and coexistence has been validated, users will be moved in small batches depending on mailbox size. Users will not have to logout immediately as the system will stage the data transfer in the background first. When ready, the account will be migrated along with a delta update of messages. Users will be informed they have been moved and will be asked to restart their Outlook clients. Users should restart Outlook and will need to wait to synchronize data to their local cached client file but all other profile settings and configurations should remain unchanged.



# Upgrade / Hybrid Migration:

In the case where you would like to use a Hybrid Migration, but are running Exchange 2007, then we will first have to upgrade your version of 2007 to 2013 and then set up the hybrid connection.

**Supported source Exchange:** 2007

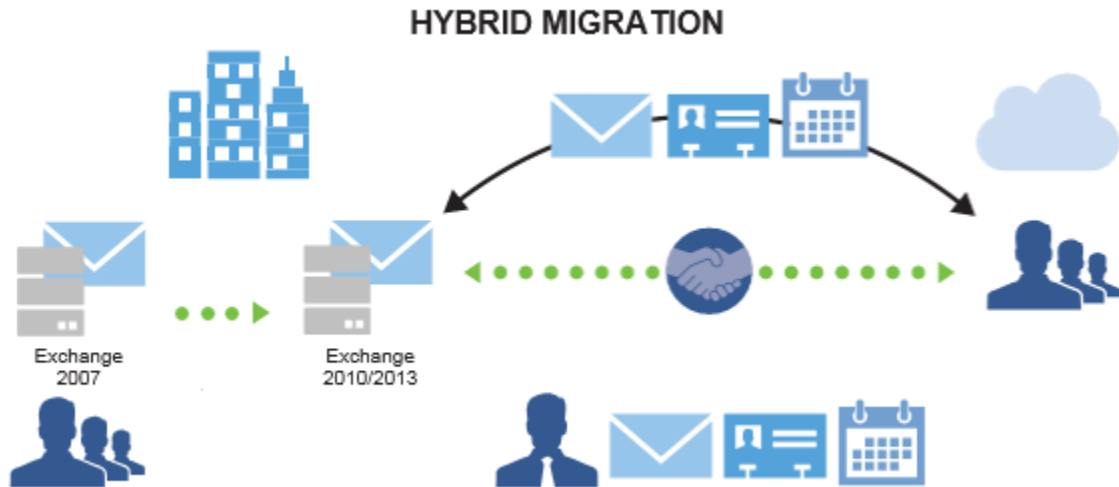
**Migration duration:** Off-hours to migrate to 2013, then as long as you want during the Hybrid Migration.

**Impact:** Some downtime during the initial migration to 2013, apart from restarting Outlook once their mailbox has been moved.

In order to limit end user impact usually associated with a staged migration, such as loss of user profile and basic coexistence, the migration strategy is to migrate the existing users from Exchange 2007 to an on-premise 2010 system, then move those users to O365 using the standard hybrid methodology.

As part of the Hybrid Migration, both on premise systems and cloud systems will be federated and users will be moved in groups to alleviate the issues of migrating large numbers of users and data at once and causing extended disruption to users and services. For this methodology, certain configuration changes may be required on the local Exchange server as well as deployment of public certificates.

Once connections have been established and full system functionality and coexistence has been validated, users will be moved in small batches depending on mailbox size. Users will not have to logout immediately as the system will stage the data transfer in the background first. When ready, the account will be migrated along with a delta update of messages. Users will be informed they have been moved and will be asked to restart their Outlook clients. Users should restart Outlook and will need to wait to synchronize data to their local cached client file but all other profile settings and configurations should remain unchanged.



**NOTE:** The Microsoft tools are used when there is a one to one mapping between the source Exchange System and the Target exchange system.

This type of migration may not support migrations of data from other hosted Exchange systems where access to the system is restricted or to:

- Migrate inactive accounts
- Filter privacy uncompliant data
- Merge email systems



# GSUITE MIGRATION

Migrating from disparate systems like Google's GSuite platform can have its own set of challenges. GSuite like Office 365 is a full featured collaboration platform providing email, calendaring, task management and collaboration tools.

**Supported source:** Gmail / GSuite

**Migration duration:** Depends on number of users and amount of data

**Impact:** Most Functionality can be migrated with minimal user impact.

There are many free and low cost migration tools available to migrate Gmail to Office 365 and most of the discount tools will utilize standard IMAP connectors including the packaged Office 365 migration tools. Unfortunately IMAP connectors are limited, can only process email and normally will require scripted files of user names and passwords in order to feed into the system to access.

Solutions that provide integrated API (Application Programming Interface) with Google should be preferred in all but the smallest migrations where content and feature transparency is not important. Integrated solutions can not only support administrative access into user mailboxes so passwords are not required to be gathered but can also extract and migrate all system functionality such as email, calendar appointments including recurring appointments, tasks and contacts.

Migrations are conducted very similarly from disparate systems by running a pre-migration of data from the existing system into the new Office 365 system and validating and monitoring that process to ensure success. Once an initial transfer of data has been successful, the users can be simply transitioned to the new system by redirecting their mail clients or installing new mail clients. All recent messages are simply updated after the users have transition to the new system in a relatively short period of time as it only constitutes a small amount of data compared to the original volume. In this way, all users are able to utilize the Office 365 system almost instantaneously and collaborate with their colleagues and peers using all the tools and features that O365 has to offer.

# GROUPWISE MIGRATION

Migrating from disparate systems like Microfocus GroupWise platform can have its own set of challenges. GroupWise like Office 365 is a full featured collaboration platform providing email, calendaring, task management and collaboration tools.

**Supported source:** GroupWise (6.5,7.0 Limited) 8.03, 2012, 2014, 2014R2, 2018

**Migration duration:** Depends on number of users and amount of data

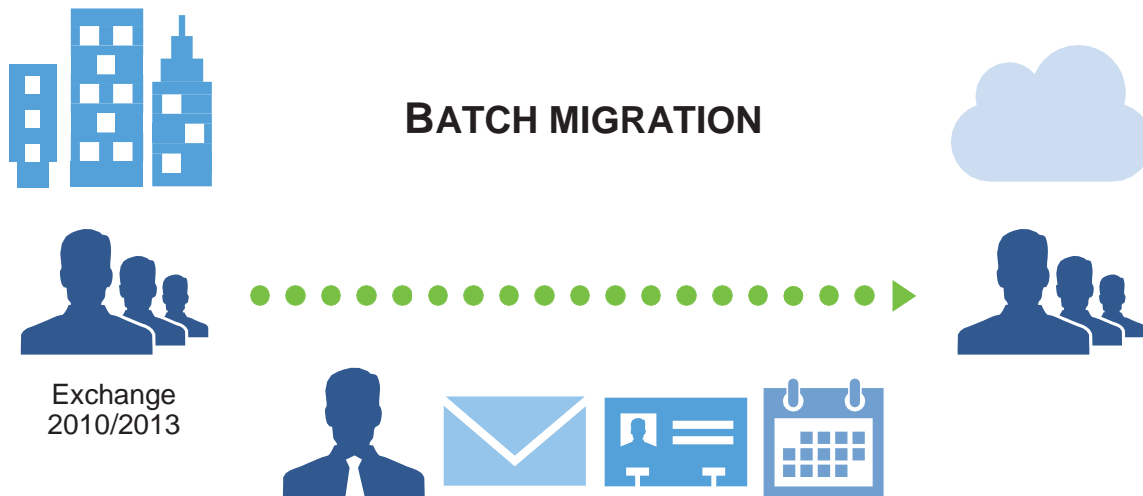
**Impact:** Most Functionality can be migrated with minimal user impact.

There are many migration tools available to migrate GroupWise to Office 365 but all tools differ in their deployment and their migration methods.

## Batch Migration

Some tools provide more of a mailbox to mailbox migration or single hop migration. Data is migrated directly from the source mailbox to the target mailbox without buffering the data. While this can provide success in the majority of cases, this method typically uses a sequential migration during off-hours which requires more resources and unfortunately sometimes success or failure is not evident until the user attempts to login to the target system.

Impact: There is impact and potential downtime for users  
Coexistence may be required for larger organizations  
Remediating issues could cause additional impact to users



## Messaging Architects Migration

Much like the Hybrid Migration with Exchange on premise to Office 365, Messaging Architects pre-migrates the data prior to migrating users so that users can be migrated together in very large batches. In addition, the Messaging Architects methodology first exports the data from GroupWise into a central archive and then from the archive into the O365 mailbox. In this way, Messaging Architects eliminates the issues present in the batch migration by validating all data transfers out and into the system prior to users moving, migrating large batches of users at once to eliminate user downtime and impact and being able to remediate any migration errors while user is actively working in the new system.

- Advantages: Users are not impacted until final transition to the new system
- Users can expect that there will be data when they migrate
- Users could login to validate/setup their mailboxes before migration
- Remediation occurs at same time users are working in new system
- No need for coexistence
- Data preserved for review without need for GroupWise licensing





SECTION 3

# Hybrid On Premise / Office 365 Considerations



Making the transition to the Cloud requires careful planning. One of the major decisions organizations must make right away is whether you want to move all mailboxes to Office 365 or want to maintain a hybrid on premise/Office 365 mixture which is sometimes called “the best of both worlds.”

In this “best of both world scenarios,” organizations may choose to keep highly-sensitive mailboxes on premise while migrating mailboxes of a less sensitive nature to Office 365.

There are compelling reasons for choosing to keep some data on premise, including:

- Organizations concerned with potential data corruption.
- Organizations concerned with losing wrongly deleted emails or accounts.
- Organizations wanting to augment the email retention limitations of Office 365.
- Organizations whose end users have mailbox sizes greater than 50 GB who still need access to all their email and do not want to pay for premium licenses.
- Organizations with strict legislation and compliance regulations or privacy concerns who may want to leave some email on premise.
- Organizations wanting to migrate to the cloud without migrating any legacy email data.
- Organizations concerned with data sovereignty who may want to operationally use the benefits of O365, but minimize the exposure.

## **Making the Right Decision**

Messaging Architects can accommodate the hybrid on premise/Office 365 scenario with the option to store some data in the cloud and some on premise. If your organization is concerned about the security of your data in Office 365, Messaging Architects gives you the flexibility to host your data in the cloud while still retaining data on premise. You also have the ability to store your data in the Messaging Architects Cloud Archive system.

Messaging Architects provides a unique, simplified, and more efficient way to help organizations securely back up business-critical information from Office 365. Through the archiving functionality, organizations can capture and back up data stored in Office 365 into a centralized and tamper-proof repository with seamless end-user access and rapid search functionality on premise or in the Messaging Architects Cloud. Messaging Architects transforms your approach to email data protection beyond the limitations of traditional backup solutions and eliminates the complexity of managing multiple third-party point products.

With Messaging Architects, organizations can have the peace of mind of migrating to Office 365 while still retaining ownership and full control of important data for legal and access to information reasons or for the purposes of retaining a secure backup copy of important data.

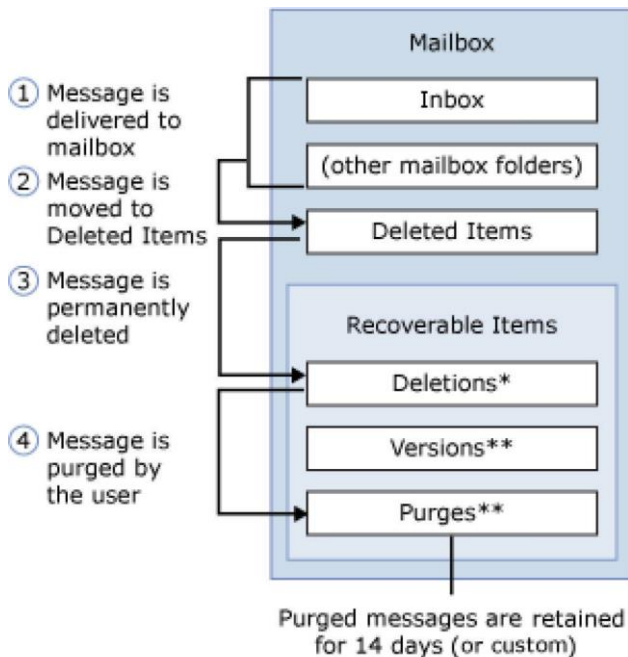
## **Understanding Email Retention in Office 365**

When it comes to recovering your data, your first line of defense in Office 365 is the same as it would be in an on premise Exchange environment. When you delete an item (messages, appointments...) in Microsoft Outlook or Microsoft Outlook Web App, a copy of the deleted item is placed in your Deleted Items Folder and you can retrieve the message directly from the Deleted Items Folder. By default, deleted items are retained in your Deleted Items Folder for 30 days.

When you delete a message from the Deleted Items Folder, the message is moved to the Recoverable Items Folder (RIF), which replaces the feature known as the dumpster in Exchange 2007. By default, deleted items are retained in your Recoverable Items Folder for 14 days.

If Single Item Recovery is enabled and the deleted item retention period has elapsed, the item is moved to the Purges folder. When the retention period of an item in the Purges folder expires, the item is permanently removed from Exchange and can't be recovered by an administrator.

The following diagram illustrates the Single Item Recovery process:



\*Recoverable by the user in Outlook Web App and Outlook

\*\*Recoverable by the administrator

There is also a 30-day retention period for deleted mailboxes. If a mailbox is accidentally deleted during the 30-day retention period, then your email administrator can generally get it back. Mailboxes cannot be recovered if they were deleted beyond the 30 day retention period. Resource mailboxes are not recoverable.

## The Limitations of Single Item Recovery Process

Single Item Recovery is a feature that essentially allows you to recover individual items without having to restore from a point-in-time backup because it removes the ability for users to “Hard” delete a message and will retain all messages for the duration of the Single Item Recovery setting. In many organizations, Single Item Recovery is often inadequate. While Single Item Recovery does offer some protection against deleting items such as messages or mailboxes, it does not allow for the recovery of a corrupt mailbox. For example, if a malicious virus corrupted all the mailboxes on a server, there is no way to revert a mailbox server to an earlier point in time. Microsoft does not perform backups of data stored in the cloud. Instead Microsoft replicates your data, so it is possible that corruption may be replicated on all copies of your data. So

with no real practical way for email administrators to back up Exchange mailboxes, users often circumvent this by exporting their mailbox contents into PST files for safekeeping, but this approach is completely impractical for use in most organizations.

## **Email Attachments and Office 365**

Organizations migrating to Office 365 face a default maximum limit on the size of email attachments they can inject into the Exchange Online system—25 MB. Organizations who want to inject larger messages into the cloud do have the ability to customize the maximum message size up to 150 MB for any or all of their mailboxes by adjusting the default message size restriction in the Exchange Admin Center on a per mailbox basis.

When migrating to Office 365, you should be aware of the 25 MB limit on email messages because if you do not change the default message size, large messages with email attachments will not be migrated to the cloud. For some organizations however, the process of manually customizing maximum message sizes on a per user basis can be a tedious, time-consuming and unrealistic approach to email management.

## **Privacy Concerns**

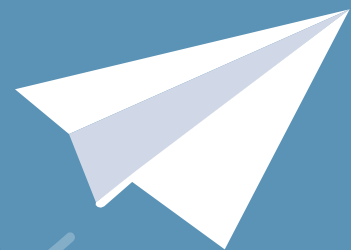
Under the US Patriot Act of 2001, government agencies such as the IRS, DHS, SEC and many others can subpoena Microsoft directly for data stored in Office 365 without the knowledge of the organization in a process known as “a blind subpoena.”

Similarly, under the Electronic Communications Privacy Act (ECPA) passed in 1986, the same agencies are allowed to access email, private photos and documents transmitted and stored longer than 180 days with an online service provider without obtaining a search warrant or demonstrating probable cause that a crime has been committed. So organizations with privacy concerns might want to consider implementing a data retention policy that deletes the data prior to 180 days while keeping a copy of the data on premise in a separate archival system such as the Messaging Architects Cloud Archive Service.



SECTION 4

# How Messaging Architects Can Help Ensure a Smoother Migration



## **Data Immutability and Office 365 Tenant Lifecycle**

A question organizations should ask is what happens to my data after my organization's Office 365 subscription ends? During the first 30 days after an Office 365 subscription ends, the Office 365 tenant account is in a grace period, known as an expired state. During this period, users can still access data. After 30 days, the tenant account enters disabled state for 90 days. During this period, users no longer have access to data, but an administrator can still log in, back up data if required, or reactivate the subscription. At the end of the disabled state, which is 120 days after your subscription has expired, the account enters the de-provisioning state. This is when the data from user accounts to email data and documents is deleted permanently.

## **Transitioning to the Cloud with Messaging Architects**

If you're migrating to the cloud, or simply planning a migration in the next few years, Messaging Architects can help you prepare by consolidating, cleaning, and migrating all of your disparate on-premise data silos (including Active Directory, PSTs, legacy archives, and files) into an open XML repository on premise or in the Messaging Architects Cloud. You can then choose to inject all of the data, or just a subset of data, into Office 365. Our solution can also help you easily extract a complete, forensically-defensible data set from numerous legacy sources, including Commvault, MXLogic, EMC SourceOne, EMC EmailXtender, Mimosa NearPoint, GWAVA Retain, HP Autonomy, Zantas EAS, and Symantec Enterprise Vault.

## **How Messaging Architects Guarantees 100% Retention**

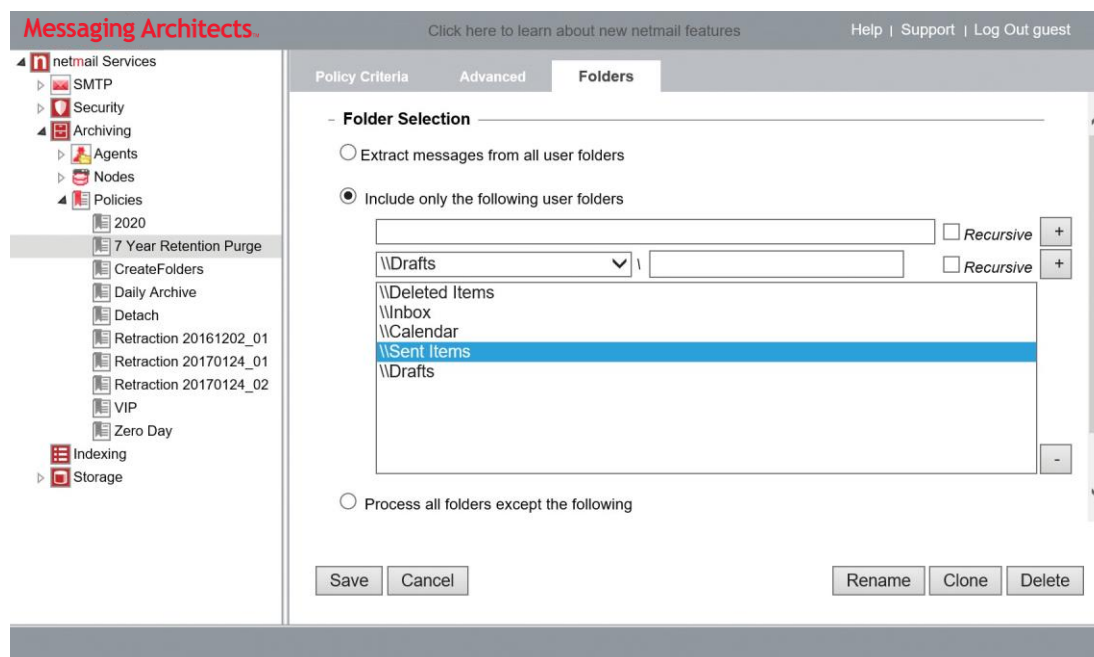
While Microsoft does offer a promise of 99.9% uptime with Office 365, there still remains a small opportunity for accidents to happen.

With Messaging Architects, organizations can now guarantee 100% message retention in Exchange. This feature works in conjunction with Single Item Recovery in Exchange to prevent any items from being removed from the Exchange database before they are archived.

Using the same methodology employed by Messaging Architects Archive, organizations create corporate-wide email retention policies which are then applied to the Recoverable Items Folders of selected users or mailboxes in Exchange Online. By applying both an adequate



retention period and storage quota to the Recoverable Items Folder in Exchange and running regularly-scheduled archive jobs in Messaging Architects Archive, your organization can ensure that even those items that may have been deleted by users, or through Exchange's automated deletion process, are still archived.



**Note:** To ensure 100% retention, the archive job must run successfully before the retention period has expired.

Messaging Architects ensures that your email messages, attachments, calendar items, tasks, notes, and address books are always available by creating a secure backup copy of your email data using its built-in archiving functionality and storing it in a centralized on premise or cloud archive to ensure the security and availability of the data for years to come. What's more, in the event of accidentally-deleted or corrupt mailboxes, Messaging Architects can restore your email data.

Messaging Architects Cloud, our cloud archiving solution, also minimizes the risk of deletion by storing archives in a separate secure archive. With a second copy of your data, you can rest assured that your archives adhere to strict data retention requirements to support legal discovery and regulatory compliance while at the same time ensuring the guaranteed preservation of 100% of your data in the event that you need to recover it.

## Creating an Email Archive Museum with Messaging Architects

The benefit of the O365 cloud is virtually unlimited storage for organizations with huge mailboxes and archives. This can alleviate an organizations burden of forcing users to delete or archive email to maintain system integrity but it can also make organizations dispassionate about adopting retention policies and therefore exasperating issues of information overload and information liability.

Microsoft currently provides the ability to store data for your inactive users in the O365 cloud at no charge, however, like all things free, at some point that no-charge benefit may cost your organization.

Messaging Architects Archive Solution can also be used to create an email museum by archiving terabytes of data from legacy Exchange and GroupWise systems into a single on premise or Azure archive repository prior to your migration to Office 365 thereby streamlining and accelerating the migration by moving only the email data you need.

Using Messaging Architects Archive Museum feature, organizations can save historical email in perpetuity in an Email Archive Museum where they would have the ability to search, view and export this data should the need ever arise in the future.





SECTION 5

# Your Office 365 Email Migration Communication Plan



# Contents

<b>Building an Effective Email Migration Communication Plan .....</b>	<b>45</b>
Identify Your Key Stakeholders and their Communication Objective .....	45
Determine How You Will Communicate.....	47
Decide What Needs To Be Communicated .....	48
Create Tools to Help Facilitate Communication .....	49
Intranet Site .....	49
Distribution List .....	50
Migration Alias .....	50
Migration Theme.....	50
Establish a Regular Email Communication Timeline .....	51
Email Communication Timeline .....	51
Before Migration –Pre-Migration Survey.....	52
Three Months Prior – Manager Email .....	52
Two Months Prior –General Email .....	52
One Month Prior –Manager Email .....	52
One Month Prior –User Email.....	52
One Week Prior – User Email.....	53
One Week Prior – General Email.....	53
One Week Prior – Manager and Support Email .....	53
One Day Prior – General Email.....	53
After Migration –Welcome Email .....	54
After Migration –Post-Migration Survey.....	54
Create Educational Email Communication Activities .....	55
Email Communication Activities - 3 Months Prior .....	55
Email Communication Activities - 2 Months Prior .....	56
Email Communication Activities - 1 Month Prior .....	57
Email Communication Activities – Post-Migration.....	59
Messaging Architects Migration	43

What to Expect on the Day of the Migration.....	60
Appendix A: Migration Surveys .....	61
Appendix B: Sample Email Communications .....	63
Three Months Prior – Manager Email.....	63
Two Months Prior – General Email.....	63
One Month Prior – Manager Email.....	64
One Month Prior – User Email .....	65
One Week Prior – User Email .....	65
One Week Prior – General Email .....	66
One Week Prior – Manager and Support Email .....	67
One Day Prior – General Email.....	68
After Migration – Welcome Email .....	69
Appendix C: Sample Before and After Migration Procedures.....	70
Top 10 Things to do Before Your Account Migrates .....	70
Top 10 Things to do After Your Account Migrates .....	71
Setting Up Your Mobile Devices.....	72
Getting Help.....	73





# Building an Effective Email Migration Communication Plan

When planning to migrate your organization's email from to Microsoft Office 365, clear and convenient communication is critical to the success of your migration project. You need to communicate with the people being migrated, their managers, the migration Support team, the migration project team, and your organization's management. Building an Effective Email Migration Communication Plan provides important recommendations from Messaging Architects on how to build an effective email migration communication plan.

## Identify Your Key Stakeholders and their Communication Objective

Key Stakeholder	Communication Objective
<b>Executives</b> (Directors, CIO)	<ul style="list-style-type: none"><li>• They know what is happening when and why at a very detailed level</li><li>• They know how and when to get their organizations to support the change</li><li>• They are excited advocates for the change</li><li>• Expectations are set regarding the challenges of the move</li></ul>

Key Stakeholder	Communication Objective
<p><b>Company Management</b> (Department Heads, Directors, Managers)</p>	<ul style="list-style-type: none"> <li>• They know what is happening with the launch and when at a detailed level</li> <li>• They understand the impact to their department</li> <li>• They know what needs to be done and assigned to get ready</li> <li>• They are actively engaged (vested) in making the move successful</li> <li>• They are excited about the change</li> </ul>
<p><b>Support Personnel</b> (Department Support Resources, Help Desk Personnel)</p>	<ul style="list-style-type: none"> <li>• They consistently understand what we are doing and when so that the message is the same no matter who you speak to</li> <li>• They know where to go for education and training</li> <li>• They are excited advocates</li> <li>• They are vested in the change</li> </ul>
<p><b>End Users</b></p>	<ul style="list-style-type: none"> <li>• They know what will happen and when it takes place</li> <li>• They know the steps that they need to complete for a successful transition</li> <li>• They are educated about the change and know how to get training and support</li> <li>• They are excited for the change and see it in a positive light</li> </ul>

# Determine How You Will Communicate

## Email Broadcasts

- General Email broadcasts to user population
- Deliverable: Standard Email Template and monthly messages
- Targeted Email broadcasts to heavy and vocal Email users
- Deliverable: Personal Email from a launch team member
- Key Stakeholder Email broadcasts
- Deliverable: Status report from director or CIO

## Launch Intranet Site

- Deliverable: A central location for the latest Outlook migration information (updated weekly)

## Face-to-Face Interaction

- Deliverable: Weekly phone calls, visits and trainings with departments and areas
- Deliverable: Personal (high-touch) support available on launch date (volunteers to “walk the floors”)
- Deliverable: Pre-launch and launch week information kits
- Deliverable: Posters and table cards

## Events

- Deliverable: User giveaway to drive behavior (Email account clean-up, etc.)
- Deliverable: Series of training and information seminars

## Decide What Needs To Be Communicated

Key Stakeholder	What They Need to Know
<p><b>Executives</b> (Directors, CIO)</p>	<ul style="list-style-type: none"> <li>• Expectations—challenges, benefits</li> <li>• Definition of project success</li> <li>• Launch status (create a metrics dashboard)</li> </ul>
<p><b>Company Management</b> (Department Heads, Directors, Managers)</p>	<ul style="list-style-type: none"> <li>• Expectations—challenges, benefits</li> <li>• Launch status</li> <li>• Will my department applications be implicated, and if so, are they ready?</li> <li>• What is the impact on my employees' productivity?</li> </ul>
<p><b>End Users</b></p>	<ul style="list-style-type: none"> <li>• Why are we moving to Outlook?</li> <li>• How does this impact me?</li> <li>• What benefits can I expect?</li> <li>• What are the project dates?</li> <li>• How will it happen (rollout details)?</li> <li>• What do I have to do?</li> <li>• How do I get help?</li> <li>• Email policies and practices (saving old email, 120-day limit, size limit)</li> <li>• Known issues (version installation issues, other?)</li> <li>• How can I get access to resources, conference rooms, distribution lists, etc.</li> </ul>

## Create Tools to Help Facilitate Communication

The people being migrated need to know what's going on, what's expected of them, where to go for help, and where to find additional information. They also need to be able to recognize official communications from the migration team. To accomplish these goals, Messaging Architects recommends that the migration team create an Intranet Site, a Distribution List, and a Migration Alias to facilitate the sharing of information.

- Intranet Site
- Distribution List
- Migration Alias
- Migration Theme

### Intranet Site

Messaging Architects recommends that you create an Intranet site that is available to all members of the migration team, the Support managers, and end users. This site should contain the following information:

- Project plan
- Migration processes
- Migration tracking spreadsheet
- Before & After migration procedures
- Known Issues and frequently asked questions (FAQs)
- End-user documentation, downloads, and/or videos
- Support Request form
- Bug filing form

Members of the migration team should have permission to post Known Issue and FAQ articles. Users should be able to comment on each of the procedures and the Known Issues and FAQ articles. The migration team should monitor these comments and update the individual procedures and articles as needed. Users should also be able to file Support Requests and monitor the progress of their previously filed Support Requests from this site. If someone feels that they have identified an issue with the product or the service, they should be able to file a bug report.

### **Distribution List**

The migration team should create a team distribution list. All project email is sent to this distribution list and is available to all members of the project team.

### **Migration Alias**

The migration team should create a migration alias from which all official migration communications are sent. Select people should have the ability to send email from this alias. This helps users identify official migration communications.

### **Migration Theme**

To make the migration process more enjoyable and engaging for end users, the migration team may want to consider creating a theme around the migration project. For example, end users can be invited to embark on a virtual journey (complete with an “itinerary” outlined on postcards). The analogy of animal or insect migrations to warmer climates can also be used.

## Establish a Regular Email Communication Timeline

The primary method of communication between the migration team and the rest of the organization should be email. Messaging Architects has created email templates that are included in Building an Effective Email Migration Communication Plan. These email messages are intended to be sent on a specific schedule before and after migration.

### Email Communication Timeline

Timeline	Communication Type	✓
<b>Before Migration</b>	<ul style="list-style-type: none"><li>• Pre-Migration Survey</li></ul>	
<b>Three Months Prior</b>	<ul style="list-style-type: none"><li>• Manager Email</li></ul>	
<b>Two Months Prior</b>	<ul style="list-style-type: none"><li>• General Email</li></ul>	
<b>One Month Prior</b>	<ul style="list-style-type: none"><li>• Manager Email</li><li>• User Email</li></ul>	
<b>One Week Prior</b>	<ul style="list-style-type: none"><li>• User Email</li><li>• General Email</li><li>• Manager and Support Email</li></ul>	
<b>One Day Prior</b>	<ul style="list-style-type: none"><li>• General Email</li></ul>	
<b>After Migration</b>	<ul style="list-style-type: none"><li>• Welcome Email</li><li>• Post-Migration Survey</li></ul>	

This section describes the intended use of each of these email messages included in the timeline.

### **Before Migration – Pre-Migration Survey**

This email message is sent to users before the migration begins. This message thanks the person who is going to be migrated for their participation during the migration and gives them the opportunity to provide feedback by completing the Pre-Migration Survey. See

### **Three Months Prior – Manager Email**

This email message notifies all managers in your organization that your organization is migrating to Microsoft Office 365. In this email message you should provide an overview of the migration process and tell your managers when the migration is scheduled. You should give the managers the information they need to communicate about the migration to their employees. See

### **Two Months Prior – General Email**

This email message is sent to everyone who is a candidate for mailbox migration. It notifies them that their mailbox is scheduled to be migrated. This email message provides them with contact information. See

### **One Month Prior – Manager Email**

This email message is sent to all managers and lists their employees that you plan to migrate. This notifies the managers which of their employees you plan to migrate and provides them with the opportunity to postpone migration for specific individuals if necessary. See

### **One Month Prior – User Email**

This email message is sent to all people scheduled to be migrated. It is a reminder and contains essentially the same information as the Two Months Prior General Email message. Links to documentation on the intranet site can also be included to allow users to begin familiarizing themselves with the new email client. See



### **One Week Prior – User Email**

This email message is sent to all people scheduled to be migrated. It is a reminder and strongly encourages them to complete the Before Migration procedures. See Appendix B: Sample Email Communications and [Appendix C: Sample Before and After Migration Tasks](#).

### **One Week Prior – General Email**

This email message is sent to everyone who has completed the Pre-Migration Survey and has been qualified to migrate. It contains additional information about what to expect when their mailbox is migrated. Users can also be reminded about where to find documentation on the new Outlook client. See [Appendix B: Sample Email Communications](#).

### **One Week Prior – Manager and Support Email**

This email message is sent to the managers of the people being migrated, to the people performing the migration, and to the members of the Support team. This is intended as the official migration hand-off. It lists who is scheduled to be migrated, who will perform the migration, and who is scheduled to support the migration. It specifies the migration time and the expected duration. See [Appendix B: Sample Email Communications](#).

### **One Day Prior – General Email**

This email message is sent to everyone who has completed the Pre-Migration Survey and is ready to migrate. This is their final notice that their mailboxes will be migrated on the next business day. This email can also include the After Migration procedures that users will have to complete once their account has been migrated. See [Appendix B: Sample Email Communications](#) and [Appendix C: Sample Before and After Migration Tasks](#).

### **After Migration – Welcome Email**

This email message is sent to everyone who has been migrated. This email message is used as the final migration verification step. It is sent to users new Office 365 mailbox. The user will see it in their Office 365 Server mailbox when they first log in.. If there is a problem with the mailbox migration, the administrator will receive a non-delivery receipt (NDR). If that happens, the migration administrator can begin troubleshooting procedures. This email message contains the user's Microsoft user name and their temporary password. This email is also a reminder that users should complete the After Migration procedures and set up their mobile devices. See

and

### **After Migration – Post-Migration Survey**

When the migration team confirms that the user has been successfully migrated and that any migration issues have been resolved, they send this email message. This message thanks the person who was migrated for their participation and gives them with an opportunity to provide feedback by completing the Post-Migration Survey. See

## Create Educational Email Communication Activities

It is important to educate and involve the entire organization about the upcoming migration. Messaging Architects has created suggested Email Communication Activities that are included in Building an Effective Email Migration Communication Plan. These activities are intended to be presented on a specific schedule before and after migration. This section describes the intended audience for each of these suggested Email Communication Activities.

### Email Communication Activities - 3 Months Prior

Audience	Activity	Completed By
<b>Executives</b>	<ul style="list-style-type: none"><li>• Communication Plan Review</li><li>• Support Plan Review</li><li>• Project Management staff updates (bi-weekly)</li><li>• Launch progress updates</li><li>• Provide executive slide sets</li></ul>	
<b>External Executives</b>	<ul style="list-style-type: none"><li>• Department Presentation</li><li>• Introductory Email &amp; Project Fact Sheet</li><li>• Custom “Needs and Impact” statement</li></ul>	
<b>Admin Support</b>	<ul style="list-style-type: none"><li>• Specialized training for admin assistants</li></ul>	

Audience	Activity	Completed By
<b>Technical Support</b>	<ul style="list-style-type: none"> <li>• Weekly training</li> <li>• Knowledge base and FAQ available</li> <li>• Outlook help desk training</li> </ul>	
<b>External (field)</b>	<ul style="list-style-type: none"> <li>• Continue weekly support contact</li> <li>• Monthly progress assessment</li> </ul>	
<b>End Users</b>	<ul style="list-style-type: none"> <li>• General announcement Email</li> <li>• Intranet Site goes live</li> <li>• Weekly end-user challenges</li> </ul>	

**Email Communication Activities - 2 Months Prior**

Audience	Activity	Completed By
<b>Executives</b>	<ul style="list-style-type: none"> <li>• Launch progress updates</li> </ul>	
<b>External (field)</b>	<ul style="list-style-type: none"> <li>• Updated “Needs and Impact” statement</li> </ul>	
<b>Admin Support</b>	<ul style="list-style-type: none"> <li>• Continued training for administrators of all managing directors</li> </ul>	

Audience	Activity	Completed By
<b>Technical Support</b>	<ul style="list-style-type: none"> <li>• Department support staff training</li> <li>• Update knowledge base and FAQ</li> <li>• Help desk training</li> </ul>	
<b>External (field)</b>	<ul style="list-style-type: none"> <li>• Weekly support contact</li> <li>• Monthly progress assessment</li> </ul>	
<b>End Users</b>	<ul style="list-style-type: none"> <li>• Posters created and displayed</li> <li>• New content to clean-up email</li> <li>• Outlook events (Brown bag, virtual events)</li> </ul>	

**Email Communication Activities - 1 Month Prior**

Audience	Activity	Completed By
<b>Executives</b>	<ul style="list-style-type: none"> <li>• Launch progress updates</li> </ul>	
<b>External (field)</b>	<ul style="list-style-type: none"> <li>• Updated “Needs and Impact” statement</li> <li>• Personal Email on rollout status</li> </ul>	

Audience	Activity	Completed By
<b>Admin Support</b>	<ul style="list-style-type: none"> <li>• Admin event/training</li> <li>• Continued training for admins of all managing directors</li> <li>• Specialized training for area managers and field RAMs to support area admins</li> <li>• Migration technical assistance available</li> </ul>	
<b>Technical Support</b>	<ul style="list-style-type: none"> <li>• Department support staff training</li> <li>• Additional call volume capacity in place for help desk</li> <li>• Updated help desk phone menu</li> </ul>	
<b>External (field)</b>	<ul style="list-style-type: none"> <li>• Weekly support contact</li> <li>• Monthly progress assessment</li> </ul>	
<b>End Users</b>	<ul style="list-style-type: none"> <li>• “How to” Email</li> <li>• “Differences” Email</li> <li>• Promote desired support paths</li> <li>• Information kiosks in company buildings</li> <li>• Support Kiosks in company buildings (e.g., for setting up mobile devices)</li> <li>• Outlook events (Brown bag, virtual events)</li> </ul>	

## Email Communication Activities – Post-Migration

Audience	Activity	Completed By
<b>Executives</b>	<ul style="list-style-type: none"> <li>• Celebration</li> </ul>	
<b>External (field)</b>	<ul style="list-style-type: none"> <li>• Update on any business issues</li> <li>• Personal thank you Email</li> </ul>	
<b>Admin Support</b>	<ul style="list-style-type: none"> <li>• Feedback (focus group) from admin assistant staff</li> </ul>	
<b>Technical Support</b>	<ul style="list-style-type: none"> <li>• Monitoring and reporting of rollout issues</li> <li>• Support team celebration</li> </ul>	
<b>External (field) Management</b>	<ul style="list-style-type: none"> <li>• Department assessment on implementation effectiveness and business impact of migration</li> </ul>	
<b>End Users</b>	<ul style="list-style-type: none"> <li>• Thank you Email</li> <li>• Thank you posters created and displayed</li> <li>• Contest for productive uses of Outlook</li> <li>• Customer satisfaction survey</li> </ul>	

## What to Expect on the Day of the Migration

- Available, trained and local support personnel
- At least 30-days of previous email in a user's Outlook Inbox
- A hotline established for reporting and resolving urgent issues
- Process for communicating critical issues to all users
- Self-support site established and promoted
- Support calls routed appropriately and resolved quickly
- Increased call volume capacity for help desk
- VIP treatment to users
- Enlist product champions as additional first line support
- Train and deploy additional employees to support key stakeholders
- Volunteers to "walk the floors"
- General support kits distributed to employees



# Appendix A: Migration Surveys

## Pre-Migration Survey

Name: .....

Alias: .....

Manager: .....

Department: .....

1. What expectations do you have for the new Office 365 system and Outlook?

.....

2. Have you reviewed the Known Issues for migration?

.....

3. Have you reduced your mailbox size to less than xx megabytes (MB)?

.....

4. Are you ready to have your mailbox migrated?

.....

5. Do you have any major concerns about the Office 365 migration?

.....

## Post-Migration Survey

Name: .....

Alias: .....

Manager: .....

Department: .....

1. Did you file any Support requests associated with your mailbox migration? If yes, have they been successfully closed?

.....

2. Was the amount of information and support provided to you before and after the migration sufficient for you and/or your team?

.....

3. Did you use any of the support material or services provided by the Migration team? If no, why not? If yes, was it useful to you?

.....

4. Do you consider your mailbox migration to have been successfully completed? If not, what issues have you experienced?

.....

5. Do you have any feedback or recommendations for the Migration team or Support about the overall migration project?

.....

# Appendix B: Sample Email Communications

Your *Office 365 Email Migration Communication Plan* contains sample email communications to managers and users when you are migrating mailboxes to Microsoft Office 365.

Please edit the recommended email messages to suit your particular situation. Insert your information when you see the following: *<description of information>*.

## **Three Months Prior – Manager Email**

Notify all managers that your company/organization is migrating to Microsoft Office 365. Tell your managers when it is going to happen. Provide an overview of the process. Explain why you are migrating. Give your managers tools to promote your company's decision to make this change. Give them information to communicate to their employees so that their employees know the migration is coming.

## **Two Months Prior – General Email**

Title: ACTION REQUIRED: We are migrating your mailbox to Microsoft Office 365! This email is your first notice that your mailbox will be migrated to Microsoft Office 365 on *<Date>*. There are many tasks that you must perform before your email can be migrated. There are also several actions you can take before migration to improve your Microsoft Office 365 experience.

See ACTION REQUIRED BEFORE MIGRATION *<insert link to before migration instructions on your Intranet site>* to prepare for your migration.

You can also preview what you will need to do after your mailbox has been migrated. See ACTION REQUIRED AFTER MIGRATION *<insert link to after migration instructions on your Intranet site>* to preview this information.

If you have any questions, check the Microsoft Office 365 FAQ *<insert link to Microsoft Office 365 FAQ>* and the Microsoft Office 365 Known Issues *<insert link to Microsoft Office 365 Known Issues>*, or contact support *<insert your support contact information>*.

Thank you,

<Your Migration or Support Contact Alias>

**One Month Prior – Manager Email**

Title: ACTION REQUIRED: Do you approve mailbox migration for these employees?

We need your approval to migrate your employees' mailboxes to Microsoft Office 365 on <Date>. If we do not receive your approval, the following employees will not be migrated.

**ACTION REQUIRED**

Review the list of your employees and respond to this email to let us know if they can be migrated.

<b>Employee</b>	<b>Migrate?</b>
<b>Shaun Adams</b>	
<b>John Hessel</b>	

In the "Migrate?" column next to the employee, please indicate "Yes" to approve mailbox migration. If someone's mailbox cannot be migrated, or if you do not want them to be migrated at this time, include that information in the "Migrate?" column.

If you have any questions, check the Microsoft Office 365 FAQ <insert link to Microsoft Office 365 FAQ> and the Microsoft Office 365 Known Issues <insert link to Microsoft Office 365 Known Issues>, or contact support <insert your support contact information>.

Thank you,

<Your Migration or Support Contact Alias>

## **One Month Prior – User Email**

Title: ACTION REQUIRED: We are migrating your mailbox to Microsoft Office 365!

Your mailbox will be migrated to Microsoft Office 365 on *<Date, Day, and Time>*. Please complete the tasks that you must perform before your email can be migrated. There are also several actions you can take before migration to improve your Microsoft Office 365 experience.

See ACTION REQUIRED BEFORE MIGRATION *<insert link to before migration instructions on your Intranet site>* to prepare for your migration.

You can also preview what you will need to do after your mailbox has been migrated. See ACTION REQUIRED AFTER MIGRATION *<insert link to after migration instructions on your Intranet site>* to preview this information.

If you have any questions, check the Microsoft Office 365 FAQ *<insert link to Microsoft Office 365 FAQ>* and the Microsoft Office 365 Known Issues *<insert link to Microsoft Office 365 Known Issues>*, or contact support *<insert your support contact information>*.

Thank you,

*<Your Migration or Support Contact Alias>*

## **One Week Prior – User Email**

Title: IMPORTANT! - ACTION REQUIRED: We are migrating your mailbox to Microsoft Office 365!

We are migrating your mailboxes to Microsoft Office 365 on *<Date>*. If you do not complete the required actions by *<Date – today's date + 1 day>* your mailbox will not be migrated.

If you have already completed the actions required before migration, please ignore this email.

See ACTION REQUIRED BEFORE MIGRATION *<insert link to before migration instructions on your Intranet site>* to prepare for your migration.

You can also preview what you will need to do after your mailbox has been migrated. See ACTION REQUIRED AFTER MIGRATION <insert link to after migration instructions on your Intranet site> to preview this information.

If you have any questions, check the Microsoft Office 365 FAQ <insert link to Microsoft Office 365 FAQ> and the Microsoft Office 365 Known Issues <insert link to Microsoft Office 365 Known Issues>, or contact support <insert your support contact information>.

Thank you,

<Your Migration or Support Contact Alias>

### **One Week Prior – General Email**

Note to Microsoft Office 365 Administrator: This email goes to everyone who has completed the migration survey and is ready to migrate. Instructions for taking the migration survey are included in the ACTION REQUIRED BEFORE MIGRATION document.

Title: NOTIFICATION: We are migrating your mailbox to Microsoft Office 365!

Congratulations! Your mailbox is ready to be migrated on <Date>.

You can continue to use your current mailbox as usual until your mailbox is migrated to Microsoft Office 365. After your mailbox has been migrated, you will receive a Welcome Email with your Microsoft Office 365 logon credentials and a link to instructions describing how to set up and use your new Microsoft Office 365 mailbox. For a preview of those instructions, see ACTION REQUIRED AFTER MIGRATION <insert link to after migration instructions on your Intranet site>.

If you have any questions, check the Microsoft Office 365 FAQ <insert link to Microsoft Office 365 FAQ> and the Microsoft Office 365 Known Issues <insert link to Microsoft Office 365 Known Issues>, or contact support <insert your support contact information>.

Thank you,

<Your Migration or Support Contact Alias>

## One Week Prior – Manager and Support Email

Note to Microsoft Office 365 Administrator: This email goes to the managers of the employees whose mailboxes are being migrated, and the designated migration administrators and support people.

Title: NOTIFICATION: These people will be migrated to Microsoft Office 365 on <Date>.

The following people will be migrated to Microsoft Office 365 on <Date>:

Employee	Other?
Shaun Adams	
John Hessel	

Migration will begin at <Time> on <Day> and is expected to be completed by <Time>, <Day>.

The employees whose mailboxes are being migrated will receive a reminder email the day before their migration. When their migration is complete, they will receive a Welcome Email with instructions describing how to use their Microsoft Office 365 mailbox.

The following people will be performing the migration:

- Administrator 1: <Name>
- Administrator 2: <Name>
- Administrator 3: <Name>

The following Support people will be available by phone, *<phone number>* and by email, *<Support Alias>*.

- Support Person 1: *<Name>*
- Support Person 2: *<Name>*
- Support Person 3: *<Name>*

Support coverage will begin at *<Start Time>* and run through *<End Time>* until this group has been successfully migrated.

If you have any questions, check the Microsoft Office 365 FAQ *<insert link to Microsoft Office 365 FAQ>* and the Microsoft Office 365 Known Issues *<insert link to Microsoft Office 365 Known Issues>*, or contact support *<insert your support contact information>*.

Thank you,

*<Your Migration or Support Contact Alias>*

### **One Day Prior – General Email**

Note to Microsoft Office 365 Administrator: This email goes to everyone who has completed the migration survey and is ready to migrate. Instructions for taking the migration survey are included in the ACTION REQUIRED BEFORE MIGRATION document.

Title: REMINDER: We will migrate your mailbox to Microsoft Office 365 tomorrow!

Migration will begin at *<Time>* and is expected to be completed by *<Time>*. Support will be available by phone, *<phone number>* and by email, *<Support Alias>*.

You can continue to use your current mailbox as usual until your mailbox is migrated to Microsoft Office 365. After your mailbox has been migrated, you will receive a Welcome Email with your Microsoft Office 365 logon credentials and a link *<insert link to instructions describing how to set up your new mailbox on your Intranet site>* to the instructions describing how to set up and use your new Microsoft Office 365 mailbox.



If you have any questions, check the Microsoft Office 365 FAQ *<insert link to Microsoft Office 365 FAQ>* and the Microsoft Office 365 Known Issues *<insert link to Microsoft Office 365 Known Issues>*, or contact support *<insert your support contact information>*.

Thank you,

*<Your Migration or Support Contact Alias>*

### **After Migration – Welcome Email**

Note to Microsoft Office 365 Administrator: This email goes to everyone who has been successfully migrated after the migration team has verified that the employees' mailbox migration and forwarding has been successfully accomplished. It can be emailed or printed and distributed by hand.

Subject: ACTION REQUIRED: Get connected to Microsoft Office 365!

Congratulations! Your mailbox has been successfully migrated to Microsoft Office 365.

### **Your new logon credentials are:**

User name: *<username>*@example.com

Temporary password: *<password>*

There are many tasks that you must perform now that your email has been migrated. We recommend setting aside two or three hours to complete them. To review the instructions and perform the tasks, see ACTION REQUIRED AFTER MIGRATION *<insert link to after migration instructions on your Intranet site>*.

If you have any questions, check the Microsoft Office 365 FAQ *<insert link to Microsoft Office 365 FAQ>* and the Microsoft Office 365 Known Issues *<insert link to Microsoft Office 365 Known Issues>*, or contact support *<insert your support contact information>*.

Thank you,

*<Your Migration or Support Contact Alias>*

# Appendix C: Sample Before and After Migration Procedures

Building an Effective Email Communication Plan contains sample lists of suggested tasks that users should complete before and after the migration to Microsoft Office 365, as well as sample steps users need to take to set up their mobile devices.

Please edit the sample documents to suit your particular situation.

## Top 10 Things to do Before Your Account Migrates

Before your account migrates to Outlook, there are a number of things you should do to help ensure a smooth transition and safeguard items that will not migrate.

Should you have any questions, please contact the IT department at *<IT or Help Desk email address>* or *<IT or Help Desk phone number>*.

1. Request to have your archive migrated if you have personal archives and wish to have the contents remain after your account is migrated.
2. Locate items in your account (and archive) that are 25 MB and over in size and either store them outside of Exchange or delete them. (Applicable to migrations to Office 365, but this can be mitigated by Messaging Architects Detach.)
3. Ensure your over account size is less than 100 gigabytes (GB) in size. Office 365 accounts have 100 GB quotas, and any data that exceeds this limit will not migrate. (Applicable to migrations to Office 365.)
4. Document any mailbox rules you want to re-create in Outlook. Rules do not migrate to Outlook.
5. Disable Junk Mail Handling to allow all mail to enter your new account. Leaving these settings enabled will prevent email you want to screen from being delivered.

6. Export backup copies of your address books to ensure aspects that do not migrate are preserved. Some less commonly used fields do not migrate and neither do Frequent Contacts.
7. Make note of access to aspects of other accounts granted to you, such as calendars, address books, folders, and proxy rights. These will be available to you in Outlook, but you'll need to go through a process to claim them.
8. Save copies of any needed conversations.
9. Check out the documentation on Outlook Web App and on getting your mobile devices configured. You'll need to wait until your account is migrated to use these, but you can get a head start on learning about them.
10. Bookmark or print a copy of the Top 10 Things to do After Your Account Migrates page so that you can get connected an up to speed right away!

## **Top 10 Things to do After Your Account Migrates**

Once your account has migrated to Office 365, you will likely want to log in, set things up as you like them, and reconnect to any resources that are shared with you. The tasks listed below provide you with the information you need for getting completely set up with your Outlook account.

Should you have any questions, please contact the IT department at *<IT or Help Desk email address>* or *<IT or Help Desk phone number>*.

1. Connect to your email, calendar, contacts, and task list.
2. Connect your mobile devices.
3. Confirm that all items expected to be in your account are available.

4. Set up your email signature.
5. Reconnect to shared email accounts.
6. Reconnect to shared calendars.
7. Re-create any rules you used previously.
8. Check Junk Mail regularly to confirm messages haven't been sent there unexpectedly. Also, set up your Junk Mail preferences.
9. Check out Lync for instant messaging with text, voice, and video. (If using Lync.)
10. Visit our Documentation and Training pages to learn how to get the most out of your version of Outlook.

## Setting Up Your Mobile Devices

### SMARTPHONES AND OTHER MOBILE DEVICES

Almost all mobile devices have an Office 365 compatible email client. Using POP/IMAP/SMTP for these devices is not recommended.

Typical Smartphones (iPhone, iPad, Android, Windows Mobile)

When setting up your device, the following information will be requested:

Email Address

Enter the address you use as your preferred email address (e.g., <username@domain.xyz>).

Login Name

Enter your username (or ID). Sometimes you may need to enter “<domain>\” (without quotes) followed by your username (or ID).

Password

Enter your corresponding password.

Domain

Enter “<domain>” (without quotes).

Server

Enter “<owa.domain.xyz>” (without quotes).

## Getting Help

All devices and email clients are different. If you are having trouble getting yours set up, please contact the HelpDesk at <phone number or extension> for help.

