

# AGENCY ENGAGEMENT OFFICE 365 PROJECT KICKOFF GUIDE

**Version 1.7**





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*Although the State of Ohio, Department of Administrative Services Office of Information Technology strives for accuracy in its publications, any publication may contain inaccuracies or typographical errors. Changes, corrections and improvements may be made periodically to these publications and will be incorporated in new versions. Please refer to the Office 365 website for the latest version of all documentation. <http://office365.ohio.gov/>*

## Document Changes

Version	Date	Description of Change
1.6	02.13.2015	Communication Explainer
1.6	02.13.2015	Removed Mobile Device section
1.7	01.08.2016	Please replace current hyperlink for password reset tool

# AGENCY ENGAGEMENT

## OFFICE 365 REFERENCE GUIDE

### OVERVIEW

This reference guide will assist you in performing the necessary tasks associated with the Office 365 agency email migration.

The guide provides roles and responsibilities, pilot activities and project activities. The guide will also provide agency checklist tasks to help you navigate through the migration.

### Reference Guide Information

The reference guide provides information, instructional and communications materials for your Agency's technical and administrative staff so that they can fully communicate the coming changes to users and prepare the Agency's environment for an easy transition to Office 365.

## OFFICE

## 365

Office 365 is a Microsoft hosted messaging solution, and delivers Outlook as a cloud-based service, which means that your email services and data will be located in the cloud. By utilizing this service, it removes the operational burden for an on-premises hosted email service.

# CHECKLISTS

## PRE-MIGRATION CHECKLIST

### Agency Tasks

- Verify that all desktop systems are up-to-date with patching
- Verify Registry Fix has been Implemented
- Remediate Users with Missing Employee IDs
- Confirm Shared Mailbox Sizes
- Identify and Supply White Glove List
- Identify and Supply Do Not Migrate List
- Identify Mailboxes under a legal hold
- Identify and Supply Necessary Licensing Types for Mailboxes
- Confirm List of Mobile Devices
- Email Application Assessment
- Ensure Staff has Completed Forefront Identity Management Training

### OIT Tasks

- Establish Open Line of Communication with Agency Contact
- Remediate Resource Accounts with Missing Employee IDs
- Remediate Improperly Formatted UPN Values
- Consolidate and Match ID/EM Environmental Counterparts

## PILOT ACTIVITIES

### Agency Tasks

- Supply Pilot List
- Execute UAT Scripts

### OIT Tasks

- Convert Shared Mailboxes
- Update Mail Enabled User Objects
- Freeze Changes to User Objects
- Run Preflight Analysis
- Resolve Any Preflight Issues
- Migrate Mailboxes
- Apply Licensing
- Establish Legal Holds

### OIT and Agency Tasks (Joint Responsibility)

- Pilot Sign Off
  - OIT Sign Off
  - Agency Sign Off

### OIT and Agency Tasks (Joint Responsibility)

- Go – No/Go Decision

## VELOCITY ACTIVITIES

### Agency Tasks

- Supply Velocity List
- Verify Auto Discover Capabilities are Functionality

### OIT Tasks

- Convert Shared Mailboxes
- Update Mail Enabled User Objects
- Freeze Changes to User Objects
- Run Preflight Analysis
- Resolve Any Preflight Issues
- Migrate Mailboxes
- Apply Licensing
- Establish Legal Holds

### OIT and Agency Tasks (Joint Responsibility)

- Velocity Sign Off
  - OIT Sign Off
  - Agency Sign Off

# TERMS AND DESCRIPTION FOR OFFICE 365

## AGENCY WHITE GLOVE LIST

The White Glove List is a list of users who the agency needs to treat differently than other email users. These individuals will get special attention throughout the migration, ensuring their email capability is always working. In most cases, the White Glove List is the executive team and potentially their administrative assistants. A few agencies have included their Service Desk staff and key technical staff necessary. **Agencies identify and supply the White Glove List.**

## DO NOT MIGRATE LIST

In the event you have an application that does not use SMTP or Relay and you cannot remediate in time for migration, please notify us with the list of mailboxes prior so we can put them on a “Do Not Migrate” list. There are no other reasons for leaving a mailbox behind.

## LEGAL HOLD

Mailboxes on Legal Hold in the EM Domain will carry the Legal Hold when they migrate to the ID Domain. Mailboxes in the ID Domain on Legal Hold will carry the Legal Hold when they are migrated to the cloud. DAS will verify that the Legal Hold is on the newly migrated email accounts to the cloud

## LICENSING TYPES

All licensing requirements have been contracted through an Enterprise Agreement. There are two types of licenses used with Office 365 email to the cloud:

- Full license that allows a user to use the product, locally and remote, to its fullest extent.
- Light license facilitating a casual user access to email through a Kiosk arrangement.

This is essentially a share environment facilitating casual user use at a very low cost.

The Agency determines who is a full function or a kiosk account. DAS has acquired enough licenses to accommodate both. The difference from an Agency perspective is the enterprise charge back cost for either type.

## EMAIL APPLICATION ASSESSMENT

Fully explained below, each Agency must evaluate their applications incorporating email within the applications. The Office 365 dependencies are described below.

## DEPENDENCIES FOR APPLICATIONS USING EMAIL

Agencies using Relay (SMTP – Simple Message Transfer Protocol) are good to go for email migration to Office 365 in the cloud. The address that is in use today is not changing or going away.

Any application that uses any other transfer mechanism must be remediated prior to moving email to the cloud.

Example:

- Does it log-in to the mail system using credentials?
- Does it use EWS (Exchange Web Services)?
- Does it use POP or IMAP? (POP and IMAP are not supported as they are unsecure, need to use SPOP and SIMAP)
- Should there be insufficient time to remediate prior to the scheduled date for your Agency migration; the application can be left behind in the EM Domain. However, prior to allowing the Agency to migrate email to the cloud, we need realistic dates and commitment when the application(s) will be remediated.

## ENCRYPTION POLICY AND PRODUCT USE

- ZIX will remain the Encryption Policy of use minimally through July 2015.
- The current Microsoft offering cannot be effectively administered in its current state.
- Microsoft is actively enhancing the encryption rules and management strategy of those rules. The State of Ohio will deploy the Microsoft encryption tool, once the enhancements fulfill the State of Ohio's requirements

## SEND AS / SEND ON BEHALF

- There has been confusion around the Send As function vs. the Send on Behalf function.
  - **Send As:** DAS can set a server setting that allows someone to send email as a specific individual. The recipient would not know that the email was actually sent by someone different than the name on the email.
  - **Send of Behalf:** In this instance, it is very clear that the sender is acting on behalf of or sending something for that named individual in the email. The recipient would recognize that the email came from a sender of a different name, but on behalf of another individual.

## DISTRIBUTION GROUPS/SECURITY GROUPS/MAILENABLED SECURITY GROUPS

- **Distribution Groups** – Distribution groups are used to define who should be included in group messages. They are primarily used with email applications to send email to collections of users. Distribution groups are NOT security enabled.
- **Security Groups** – Security groups are used to control access to resources. For example, an administrator can create a security group to grant a group of people access to a Shared Calendar or Resource Calendar.
- **Mail Enabled Security Groups** – Mail enabled security groups are used to disseminate information to all the members within a security group. For example, a group of technical staff requiring elevated privileges to specific servers also need to receive information regarding server outages.

**Note:** Agencies should be aware of the Distribution Groups that are being used as well as how they are being used. Any Distribution Group that is being used for setting permissions to shared resources will need to be converted to a Security Group.

# OFFICE 365 COMMUNICATIONS

## THE IMPORTANCE OF COMMUNICATION

As agencies progress toward their Office 365 Go Live dates, it is important that the project staff strive to keep lines of communication open and to engage their entire user population. It is highly recommended that agencies set expectations regarding the users' roles, explain any necessary effort and keep them aware of timelines. This communication effort offers a key advantage toward an agency's assured migration success.

At this time, there will be a two-phased approach toward this "cloud" implementation. The first step is to move from the existing on-premises Exchange environment to the Identity environment. The second step will then be to migrate to the new Office 365 email service.

We have established a workflow of communication milestones and have provided examples that should be tailored to meet your agency's needs and sent to your user population throughout the entire migration.

The provided examples of user communications are geared toward the second step of the migration process, or the "cloud" implementation; however, they can be modified by your agency staff to differentiate the migration plans. During the two different phases there are very minor changes, noted below that should be communicated at each step in the migration process:

### MOVING FROM THE ON-PREMISES EM SOLUTION TO THE IDENTITY ENVIRONMENT:

- You must know your SQUID or your myohio account number and password
- You will log into your mail account using the SQUID@id.ohio.gov credential name
- You can access your webmail at: [mail.ohio.gov](mailto:mail.ohio.gov)
- You will not be able to send or receive messages larger than 25MB
- You will notice more accurate contact information for colleagues within the Global Address List
- Any Mobile Devices will require remediation

## MOVING FROM THE IDENTITY ENVIRONMENT TO THE NEW O365 "CLOUD:"

- Continue to log into your mail account using the SQUID@id.ohio.gov credential name
- Access your webmail at [webmail.ohio.gov](http://webmail.ohio.gov)
- You will not be able to send or receive messages larger than 25MB
- You will have an increased mailbox size of 50GB and an unlimited online archive folder
- Any Mobile Device will require remediation

The sample communications also provides a link to the [Office 365 SharePoint site](#) where the same information can be accessed.

## T-Minus Workflow



Welcome letter providing information for:

- ✓ Migration date
- ✓ User Name format
- ✓ Message size limitation
- ✓ Link provided to SharePoint and web portal access



Follow up letter providing information for:

- ✓ Migration date
- ✓ User Name format
- ✓ Message size limitation and remediation necessary
- ✓ Introduces information packet for migration day
- ✓ Link provided to SharePoint and web portal access



Provides information of:

- ✓ Migration date
- ✓ User Name format
- ✓ Message size limitation and remediation necessary
- ✓ Note to include job aids on how to log in on migration day
- ✓ Link provided to SharePoint and web portal access



Message reviewing the necessary steps for:

- ✓ Pre-Migration Reminders
- ✓ During Migration – What not to access
- ✓ Post Migration Login instructions
- ✓ Link provided to SharePoint and web portal access



Success Message with reminders for:

- ✓ Login information for OWA
- ✓ Updating signature in Outlook
- ✓ Link provided to SharePoint and web portal access

## The Path to Optimization - Office 365 Email Migration (T-30)

It is an exciting time in state government as we continue our journey on the path to Optimization through the State of Ohio's private cloud services. The Department of Administrative Services, Office of Information Technology (OIT), is rolling out Office 365, a cloud-based service which allows Ohio to consume Microsoft Office on demand. This solution reduces the cost and demands on the state infrastructure and provides flexibility for users to access their Office programs anywhere, on any device.

The first step toward this "cloud" implementation is to move from the existing on-premises email to the Office 365 email service. On **[INSERT DATE]** **[INSERT AGENCY NAME]** will be migrated into the Office 365 email service.

**[INSERT AGENCY NAME]** and OIT are working together to make this transition as smooth as possible and we appreciate your time and cooperation in our endeavor to make the Office 365 email migration a success. A few changes that you can expect as part of this migration:

- To access your email, you will use your eight-digit State of Ohio User ID (SOUID); otherwise known as your myOhio ID or your State of Ohio User ID
- A password change will be required every 90 days
- There the new Outlook Web App (OWA) portal for those who sign-in remotely: [webmail.ohio.gov](http://webmail.ohio.gov)
- Your mailbox size will increase to 50GB

If you have any questions, please contact **[INSERT AGENCY POINT OF CONTACT]**

Thank you,

## The Road to Office 365: Email Migration (T-15)

In less than three weeks on **[INSERT DATE]** **[INSERT AGENCY NAME]** will be migrated to the new Office 365 “cloud” email system!

Your emails, contacts, calendar items and tasks will be migrated. The look and feel of your new email environment will be virtually identical to the one you are using today; however, the log-in process will be slightly different.

As part of this process there are important steps that you can take to help ensure that this migration is successful:

- Remember your eight-digit State of Ohio User ID (SOUID); otherwise known as your myOhio ID or your State of Ohio User ID
- Know that your log-on username will change to [xxxxxxx@id.ohio.gov](mailto:xxxxxxx@id.ohio.gov)
- Use the new Outlook Web App (OWA) portal if signing-in remotely: [webmail.ohio.gov](http://webmail.ohio.gov)

We are confident that you will be pleased with the migration process and the functionality of the application. Since you will be using the same version of Outlook that you are currently using there is no training necessary.

**[INSERT AGENCY NAME]** and OIT are working together to make this transition as smooth as possible and we appreciate your time and cooperation in our endeavor to make the Office 365 Email migration a success.

If you have any questions, please contact **[INSERT AGENCY POINT OF CONTACT]**

Thank you,

## Office 365 Email Migration (T-7)

One Week to Go!

The excitement builds as agencies continue the journey of Optimization into the State of Ohio's private cloud services. We are just one week away from transitioning your mailbox to the Office 365 email service!

To prepare for next week's migration, we are providing instructional information to help you with log-in changes for Office 365 email and Outlook Web App (OWA). **Please print the following instructional pages.** [ATTACH FILES REGARDING OWA USER SIGN-ON and OPENING EMAIL AFTER MIGRATION]

You have already received information regarding crucial requirements for the transition to Office 365, including:

- Message File Size Requirements – If you have received notification, please be sure to remove or save emails containing large file attachments to another location other than email
- Remember your eight-digit State of Ohio User ID (SOUID); otherwise known as your myOhio ID or your State of Ohio User ID

We appreciate your time and cooperation in our endeavor to make the Office 365 Email migration a success. If you have any questions, please contact [INSERT AGENCY POINT OF CONTACT INFORMATION].

Thank you,

## Office 365 Email Migration (T-1)

One Day to Go – Email Migration is **[INSERT DATE]**!!!

**[INSERT DAY]** **[INSERT AGENCY NAME]** is being migrated into the Office 365 email service. Our team is excited and fully prepared to begin migration **[INSERT DAY]** and we wanted to offer a final list of reminders. **Please print this message to use as a reference.**

### Pre Migration:

- Remember your eight-digit State of Ohio User ID (SOUID); otherwise known as your myOhio ID or your State of Ohio User ID

### During Migration:

- Do not access your Outlook email from **[INSERT DATE and TIMES]**
- Do not access your Outlook Web App (OWA) via the internet during this time.
- Your mobile device will not have email access

### Post Migration:

- Launch and log into your Outlook email client with your eight-digit State of Ohio User ID (SOUID); otherwise known as your myOhio ID or your State of Ohio User ID:



- If applicable, log into Outlook Web App (OWA) with your eight-digit State of Ohio User ID (SOUID); otherwise known as your myOhio ID or your State of Ohio User ID at: [webmail.ohio.gov](http://webmail.ohio.gov)
- Contact your agency IT Support team for help with Office 365 issues

We appreciate your time and cooperation in our endeavor to make the Office 365 Email migration a success. If you have any questions, please contact **[INSERT AGENCY COMMUNICATIONS POC INFORMATION]**.

Thank you,

## Office 365 Email Migration (T+1)

### Congratulations – Welcome to Office 365 Email!

[INSERT AGENCY NAME] has been successfully transitioned to the State of Ohio's private cloud email service!

We appreciate your time and cooperation in making the Office 365 Email migration a success. If you have any questions or concerns, please contact [INSERT AGENCY COMMUNICATION POC INFORMATION].

Thank you,

## OFFICE 365 CHANGING YOUR PASSWORD

Access to your email account is tied directly to your State of Ohio User ID (SOUID). It is very important that you remember your SOUID and that you properly maintain your OAKS account information. The first time use of a SOUID password must be set up by the OAKS Helpdesk at 614.644.6625 or 1.888.OhioOAK (1.888.644.6625).

Once you have logged into your OAKS account for the first time, it is best practice to immediately set up at least two primary email addresses and to create your Forgotten Password question.

## TO ESTABLISH YOUR PRIMARY EMAIL ADDRESSES

- Access the myOhio.gov website at: myOhio.gov
- Enter your SOUID and password when prompted
- Select “My Info”
- Select “Email Addresses”



- Enter at least two email addresses and mark them both as Primary accounts.

Primary Email Account	Email Type
<input checked="" type="checkbox"/>	Business
<input checked="" type="checkbox"/>	Home

- Click OK to save

**Note:** In the event that you must use the “Forgot Password” link on the homepage, OAKS must be able to send a temporary password to an account other than your work address:

**State of Ohio User ID Sign In**

User ID:

Password:

**Sign In**

myOhio and OAKS are a State of Ohio computer system, which may be accessed and used only for official state business by authorized personnel. Unauthorized access or use of this computer system may subject violators to criminal, civil, and/or administrative action.

[Forgot Password](#) [Contact Info](#)

The following “Change or Set Up Forgotten Password Help” and “Changing My Password” instructions are available at <http://myohio.gov>.



## Change or Set Up Forgotten Password Help

The Forgotten Password feature enables the system to verify a user's authenticity when requesting a new password. If the user enters the appropriate response, then the system automatically emails a new password.

- Step 1** Visit <http://myohio.gov>. Enter your User ID and Password and click **Sign In**.  
For User ID and Password assistance please contact 1-800-409-1205, Option 1.

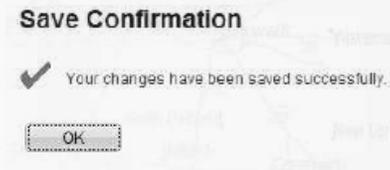
- Step 2** Move your cursor over the **My Info** tab in the top toolbar after logging in.  
Select **Setup Forgotten Password Question** from the drop-down list.



- Step 3** In the **Question** box, select a question.  
In the **Response** box, enter the expected answer.  
Then click **Save**.



- Step 4** The system will now automatically email a new password when the current one is forgotten and you would like to reset it without contacting the helpdesk.

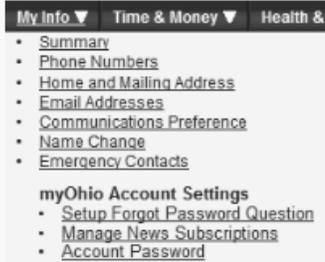




# Changing My Password

**Step 1** Visit <http://myohio.gov>. Enter your User ID and Password and click **Sign In**.  
 For User ID and Password assistance please contact 1-800-409-1205, Option 1.

**Step 2** Move your cursor over the **My Info** tab in the top toolbar after logging in.  
 Select **Account Password** from the drop-down list.



**Step 3** Enter your current password in the **Current Password** field.  
 In the **New Password** field, enter the new password.  
 Confirm the new password by entering it again in the **Confirm Password** field.  
 Click **Change Password** to submit your change.



**Step 4** Your password has been changed.  
 Click **OK** to return to the change password home page.  
**Note:** For existing users your password will automatically expire after 90 days. You must then reset your Password to a new one not used before.



# ADVISORY DOCUMENTS

# DESKTOP PATCHING REQUIREMENTS

The following are the desktop patching requirements for a successful migration of email to the cloud, whether from the EM or the ID Domain.

- Security Patches
- Operating System Patches
- Office Patches

**Note:** At a minimum, the patch level should be no older than 6 months.

## SERVICE PACKS AND PUBLIC UPDATES

The Microsoft Service Pack Support Lifecycle Policy requires you to install Office Service Packs within 12 months of its release. Office 365 requires you to be in compliance with this policy.

Automatic public updates contain critical security fixes for Microsoft products. Office 365 strongly recommends that customers accept automatic updates from Microsoft both to secure their environments and to have the best experience with Office 365. Office 365 ProPlus and Lync Basic users can only defer installing updates for 12 months from date of release.

## NETWORK, FIREWALL & PORT REQUIREMENT

In order to connect to OWA and Outlook, make sure you have the following ports through Local Area Network (LAN) set up as described below.

Most proxy servers, firewalls, and other Internet connection sharing methods can restrict port access. If your agency uses a proxy server, it may restrict packets from unknown sources.

OWA Requirements	
Network Requirement	Access to the Internet
Port Requirements	Port 443 to the Internet open
Outlook Requirements	
Network and Firewall Requirement	Access to the Internet
Port Requirements	Port 443 to the Internet open Port 25 to the Internet open Port 80 to the Internet open

# EMAIL MIGRATION SYSTEM REQUIREMENTS

The Office 365 requirements in this document are subject to change. This is a living document and will be updated as needed.

## COMPONENTS AND REQUIREMENTS

### Operating System: Windows Server 2008 R2

- Windows 7 – fully patched
- Windows Server 2012
- Windows 8
- 32-bit Office can be installed on 32-bit or 64-bit operating systems and 64-bit Office can only be installed on 64-bit operating systems.

### Computer and Processor

- 1 GHZ or faster x86 or 64-bit processor with SSE2 instruction set.

### Memory

- 1 GB RAM (32-bit) 2 GB RAM (64-bit) recommended for graphics features, Outlook Instant Search, and certain advanced functionality.

### Disk Space

- 3 gigabytes (GB)

### Monitor Resolution

- 1024 x 768

## WEB BROWSERS/OFFICE CLIENTS

### Internet Explorer 11

- Windows 8.1
- Windows 7 SP1 or greater

## Internet Explorer 10

- Windows 8
- Windows 7

## The latest version of Office - Office 365 ProPlus

- Windows 8.1
- Windows 8
- Windows 7

## Office 2010 Service Pack 1 (Service Pack 2 Recommended)

- Windows 8.1
- Windows 8
- Windows 7

## Office 2007 with Service Pack 3

- Windows 8.1
- Windows 8
- Windows 7

## Office for Mac 2011 with Service Pack 3

- Mac OS X 10.6 or later

## Mozilla Firefox

- The latest version of Firefox.

## Google Chrome

- The latest version of Chrome.

## Safari

- The latest version of Safari
- Mac OS X (any version)

## WEB BROWSERS: FIREFOX/CHROME/SAFARI

Office 365 is designed to work with the current or immediately previous version of Firefox, or the latest version of Chrome or Safari. Microsoft supports only browser versions that are also supported by the browser's manufacturer. Typically, this is only the most current version. Firefox and Chrome are both designed to stream updates to your devices every six weeks. Many common problems with these browsers are resolved in the next update.

### SYSTEM REQUIREMENTS ACROSS OFFICE 365 PLANS

Feature	Office 365 Enterprise E3 Education A3 Government G3	Office 365 Enterprise K1 Government K1
Designed to work with Internet Explorer 11	Yes	Yes
Designed to work with Internet Explorer 10	Yes	Yes
Designed to work with Internet Explorer 9	No	No
Designed to work with Internet Explorer 8	No	No
Designed to work with the current or immediately previous version of Firefox	Yes	Yes
Designed to work with the latest version of Google Chrome	Yes	Yes
Designed to work with the latest version of Safari	Yes	Yes
Designed to work with Office 365 ProPlus	Yes	Yes
Designed to work with Office Professional Plus 2013	Yes	Yes
Designed to work with Office Professional Plus 2010	Yes	Yes
Designed to work with Office clients in extended support	No	No
Requires installation of Office Service Packs within 12 months of release	Yes	Yes

## OFFICE 365 REGISTRY

The Office 365 team is requesting that all agency partners run the following Registry edits for the Credential Pop-up and the Connectivity Balloon. The Credential Pop-up edit is recommended for each individual account in your agency. The Connectivity Balloon edit is on an as needed basis.

### Credential/Authentication Pop-up

When attempting to create an Outlook profile or connect to an Office 365 mailbox, you may be prompted for credentials multiple times.

**Note:** The Credential Pop-up edit is recommended for each individual account in your agency.



If you cancel the credentials prompt, you receive the following message:

“The connection to Microsoft Exchange is unavailable. Outlook must be online or connected to complete this action.”

To fix the Pop-up error;

- Run the following edit on each and every account in your agency

HKEY\_CURRENT\_USER\Software\Microsoft\Exchange  
Name: NoUIAutoDForSharedMailboxes  
Type: DWORD (32-bit)  
Value: 1

## Connectivity Balloon

The second edit is in regards to the connectivity balloon indicating that your account is disconnected.

**Note:** This edit only needs to be run on an “as needed basis”.

If your user is receiving the following pop-ups and you wish to disable the Outlook network connectivity balloon;



- Right-click on the Outlook tray icon and uncheck “Show Network Connectivity Changes”.



After closing Outlook the following Registry key is created:

```
[HKEY_CURRENT_USER\Software\Microsoft\Office\14.0\Outlook\Display Types\Balloons]  
"NetConn"=dword:00000000
```

To create a new Group Policy and assign it to users, use the Group policy preferences.

- Locate the “User Configuration\Preferences\Windows Settings\Registry”
- Create a new registry item

To notify Administrators about Exchange Server connection information;

- Apply this policy only to the normal users

To increase speed after Group Policy is in effect;

- Key “Gpupdate /force” on the client machine
- Restart Outlook

## FILE SIZE

### 25MB EXPLAINED

Prior to January 2015, we asked agencies to move all emails greater than 25MB to a non-Exchange location, because anything larger than 25MB could not be migrated to the Cloud.

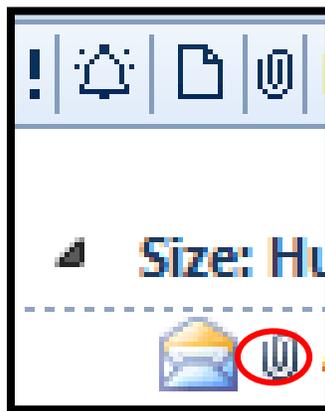
The 25MB restriction no longer applies as all mail up to 150MB can now be migrated to the Cloud. These larger emails can be viewed, searched and moved, but users are unable to send or forward email outside the user's mailbox.

### Large Items Folder Creation

The DAS Exchange team is running a scan on all on-premises mailboxes in the Exchange environment in order to locate messages over 25MB. Once the scan isolates the large files, they will be moved to a "LargeItems" folder at the root of the user's mailbox.

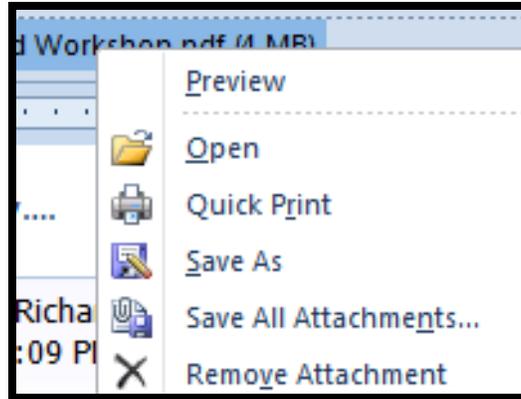
### Saving an Attachment

A paperclip icon is displayed for emails containing an attachment.



From an email with an attachment(s);

- Right-click the attachment and select one of the following:
- Save As – Select this option to save one attachment.
- Save All Attachments – Select this option to save multiple attachments.
- Remove Attachment - Select this option to delete the attachment.



If you selected to save the attachment(s), the Save Attachment window is displayed.

- Scroll to the location where you want to save the file
- Click OK

The file is now saved.

# OFFICE 365 MIGRATION TECHNICAL USER TRAINING

Agency staff may already be familiar with Forefront Identity Manager (FIM) — an identity management software product designed to manage users' credentials and groupings throughout the lifecycle of their membership of an enterprise system. Agencies that currently reside in the ID domain have been using the [password reset tool](#) for staff members' account password changes.

As part of your migration to Office 365, FIM will be used for management, creation and changes of user accounts; therefore, it is necessary for designated agency technical staff; i.e., those who administer user account groups, to attend training on the use of the FIM Portal: [Forefront Identity Manager](#), which does require IE for proper functionality.

There will be multiple sessions available for attendance and we encourage staff to attend at or during your pilot phase as well as just prior to your scheduled velocity date.

<b>OFFICE 365 FIM Portal Training Outline</b>
<b>User Creation and Portal Overview</b>
<b>User creation and synchronization</b>
<b>Logging into FIM Portal</b>
<b>Home page overview</b>
<b>Distribution Groups</b>
<b>Create new distribution groups</b>
Create new manually populated distribution group
Manage users
Manage Owners and Co-Owners
Create Dynamic Distribution group
Manage Criteria
Manage Owners and Co-Owners
<b>Finding your distribution groups</b>
<b>Advanced search functions</b>
<b>Modifying distribution groups</b>
Manage users
Manage Owners and Co-Owners

**OFFICE 365 FIM Portal Training Outline**

Manage Criteria

Manage Owners and Co-Owners

**Deleting distribution groups**

**Security Groups**

**Create new security groups**

Create new manually populated security group

Manage users

Manage Owners and Co-Owners

Create Dynamic security group

Manage Criteria

Manage Owners and Co-Owners

**Finding your security groups**

**Advanced search functions**

**Modifying security groups**

Manage users

Manage Owners and Co-Owners

Manage Criteria

Manage Owners and Co-Owners

**Deleting security groups**

**Managing User Accounts**

**Finding user accounts**

**Advanced search functions**

**Editing user information**

**Account Information**

**Enable new mailbox**

Enable

Licensing

**Licensing Office365 account**

**Assigning and removing full access permissions**

**Assigning and removing send-as permissions**

**Hiding mailbox from the GAL**

**Resource Accounts – Room, Equipment and shared mailboxes**

**Creating new resource account**

**Finding resource accounts**

**OFFICE 365 FIM Portal Training Outline****Advanced search functions****Editing resource accounts****Account Information****Assigning and removing full access permissions****Assigning and removing send-as permissions****Hiding mailbox from the GAL****Calendar options****Service Accounts****Creating new service account****Finding service accounts****Advanced search functions****Editing service accounts****Admin Accounts****Creating new admin account****Finding admin accounts****Advanced search functions****Editing admin accounts****Administrator Password Reset****Accessing password.ohio.gov/admin****Resetting a user or contractor account password****Resetting other and county worker passwords****Resetting admin and service account passwords****User Self-Service Password Reset****Accessing password registration site****Accessing password reset site**

# OFFICE 365 PILOT RECOMMENDATIONS

## PILOT

- An Office 365 Pilot is scheduled 3 or 4 weeks prior to the Velocity Date for email migration to the cloud. The 3 or 4 weeks out is entirely dependent on whether it is a 1 or 2 week pilot. We collectively arrive at which time interval is appropriate for your Agency.
- Once the pilot is completed, there is always a week hiatus prior to the actual Velocity date, primarily to clean up any discovered issues.
- The intention of the pilot is to exercise Office 365 in the cloud as your Agency uses email today with the expressed intent of surfacing any issues germane to your Agency's use.
- Pilot participants selection should represent a cross section of diverse users, reflective of how your Agency uses mail. This diversity also drives the number of participants. Agencies have selected as few as 10 to as many as 50.
- It is very important that if you pick an executive, that you also have that person's administrative assistant participate. If one or the other is left in the existing domain, he/she will not be able to view the other user's calendar.

# PILOT GO LIVE CHECKLIST

## PILOT GO LIVE CHECKLIST

- All accounts on the Pilot User List have been migrated
- All Pilot User Mailboxes have active licenses
- All Pilot User Client Mailboxes are activated and connected
- All [AgencyName] technical support employees have received training in FIM Portal and have the proper permissions

## PILOT WEEK CHECKLIST

- All Pilot User accounts have been signed into and are being used
- Pilot members have completed UAT to the satisfaction of the [AgencyName]
- OIT and [AgencyName] have identified and remediated Pilot migration issues
- All Pilot Users with Mobile Devices have activated devices
- There are no roadblocks hindering [AgencyName] from moving forward

## AGREEMENT

We, AgencyName, agree that all Pilot Checklist Activities have been completed and we agree that both OIT and [AgencyName] are ready to move forward to the next step [VELOCITY] in Phase One of the OFFICE 365 Migration process.

We would like to schedule a tentative Velocity date for [AgencyName] to be migrated to Outlook 365.

Tentative Velocity Date: [InsertDate]

Agency Point of Contact Signature: \_\_\_\_\_

OIT Point of Contact Signature: \_\_\_\_\_

## VELOCITY WEEK ACTIVITIES

Once an agency has completed all the prep work and has completed their Pilot sign-off we will move forward with the scheduled Velocity date. “Velocity Week” is simply the movement of state email from on-premises to the cloud. A few days prior to Velocity it is necessary to communicate the following information to the project team:

- Velocity List
- White Glove List
- DO NOT Migrate List

It is also important to make sure that a change-freeze is in place on all existing accounts. Please check your ticketing system to verify that changes have not been requested and/or that they have been completed prior to Velocity Day.

Agency communication remains a vital piece of a successful migration. Please visit the Office 365 SharePoint site <http://office365.ohio.gov> for valuable communication templates (T-communications) that will help you lead your agency staff through this transition.

On Velocity Day, members from DAS tech staff will be present at your agency. All migration support issues should be routed through the agency technical staff. DAS staff will be available for assistance when necessary.

During the first week after migration, verify that the following checklist activities are being done:

- Confirm and Test Shared Mailboxes
- Confirm visibility of Distribution Lists
- Confirm visibility of Archive Files
- Remediate Mobile Devices
- Confirm Legal Hold Mailboxes
- Attend FIM Portal Refresher
- Review On-Boarding/Off-Boarding Procedures

Also during Velocity week, DAS staff will be available for migration support issues and the project staff will schedule conference calls to provide communication of migration issues, report resolution and answer general migration questions.

# VELOCITY GO LIVE CHECKLIST

## VELOCITY GO LIVE CHECKLIST

- All accounts on the [AgencyName] Velocity List have been migrated
- [AgencyName] User Mailboxes have active licenses
- [AgencyName] Users are able to log into OWA

## VELOCITY WEEK CHECKLIST

- [AgencyName] User Client and Kiosk accounts have been signed into and are being used
- Distribution Lists are visible in GAL and are operational
- Shared Mailboxes are confirmed as connected and operational
- [AgencyName] Users with Mobile Devices have activated devices
- [AgencyName] Users' Archives are visible
- [AgencyName] technical support staff has received FIM Portal training and have the proper permissions
- OIT and [AgencyName] have identified and remediated migration issues

## AGREEMENT

We, AgencyName, agree that all Velocity Checklist Activities have been completed and Velocity is concluded. Any future incident handling will be in accordance with the SLA agreement and processed through the CSC.

Agency Point of Contact Signature: \_\_\_\_\_

OIT Point of Contact Signature: \_\_\_\_\_

# OUTLOOK WEB APP (OWA) SIGN-ON

## SIGN-IN TO OFFICE 365

When signing-in to Office 365, users will be directed to the first credentials screen.



At the User ID screens;

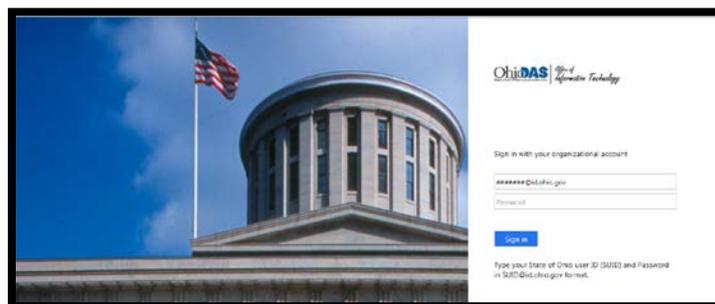
- Key your State of Ohio User ID (SOUID) number and @id.ohio.gov

Example: 10101010@id.ohio.gov

**Note:** You do NOT need to key your password on this screen as you will be redirected to the next credential screen where your password will be required.

- Click the “Sign-in” button

The second credential screen is identifiable by the DAS OIT logo.



After being redirected to the second credential screen;

- Key your password in the password field
- Click the “Sign-in” button

After clicking the Sign-in button, you will be signed in to Office 365.

# OPENING EMAIL AFTER MIGRATION

## OFFICE 365 LOGON AND PASSWORD

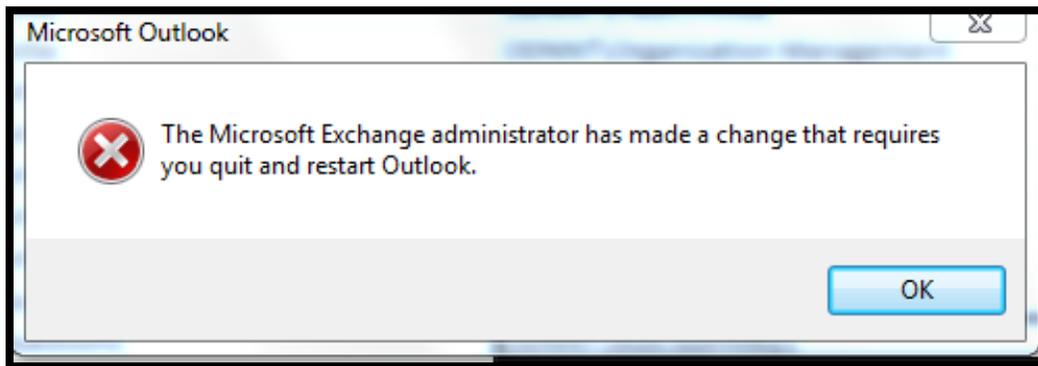
After migrating to Office 365 email, you will need to sign into your email account.

- Your ID will be your OAKS ID, now called your State of Ohio User ID (SOUID) - an eight digit number, followed by @id.ohio.gov. For example, 18888888@id.ohio.gov
- Your password is the same as your SOUID (OAKS) password.

### Opening your Email after Migration

Your migration may complete while you are working in Outlook, or, it may complete overnight.

- If your email was migrated overnight and you logged out of Outlook at the end of the day, then you just need to open Outlook.
- If you are working in Outlook when your migration completes, then you will receive the following message in Outlook. Close Outlook and then open it again.

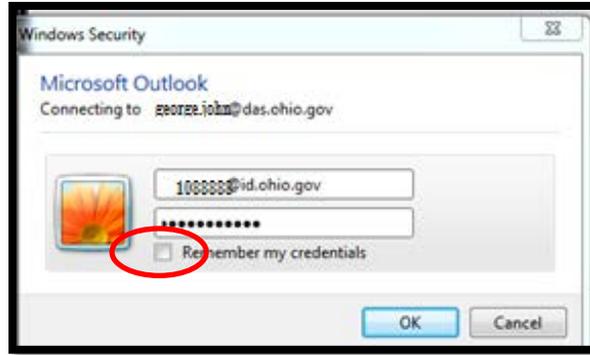


At the credentials screen;

- Enter your ID and password using the following format:

ID	SOUID@id.ohio.gov
Password	SOUID password

- Check the “Remember my credentials” checkbox to save your credential information.



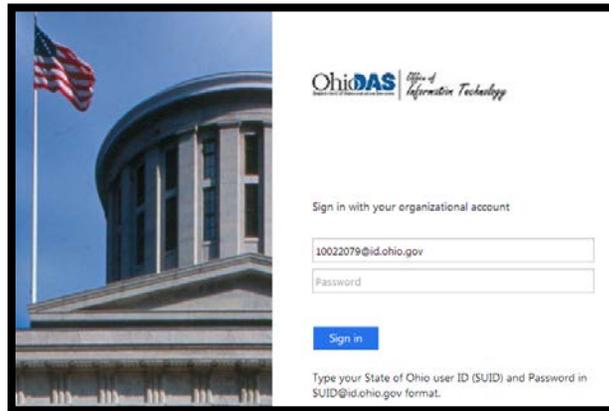
**Note:** Your credentials are saved until you change your password or access email from another device.

## Opening Web Mail after Migration

In your Internet Explorer browser window;

- Enter the following URL address: [webmail.ohio.gov](http://webmail.ohio.gov)

At the credentials screen below;



- Enter your ID and SQUID password.

From your browser;

- Select the Outlook link at the top of the page.



To view your calendar;

- Select the Calendar link at the top of the page.

