



OFFICE 365

TECHNICAL REFERENCE GUIDE

VERSION 2.3



## Table of Contents

<b>AGENCY ENGAGEMENT</b>	<b>5</b>
<b>OFFICE 365 INITIAL MIGRATION REPORT</b>	<b>6</b>
<b>OFFICE 365 ADVISORY DOCUMENTS</b>	<b>9</b>
<b>DESKTOP PATCHING REQUIREMENTS</b>	<b>10</b>
<b>EMAIL MIGRATION SYSTEM REQUIREMENTS</b>	<b>11</b>
<b>OFFICE 365 REGISTRY</b>	<b>14</b>
<b>FILE SIZE</b>	<b>16</b>
<b>OFFICE 365 IN VIRTUAL ENVIRONMENTS</b>	<b>18</b>
<b>OFFICE PROPLUS IN SHARED ENVIRONMENTS</b>	<b>22</b>
<b>GROUP POLICY CACHED EXCHANGE MODE</b>	<b>20</b>
<b>RESOURCE AND SHARED MAILBOXES</b>	<b>25</b>
<b>SHARING OUTLOOK CALENDARS</b>	<b>27</b>
<b>PERMISSION LEVELS:</b>	<b>30</b>
<b>DELEGATING ACCESS</b>	<b>31</b>
<b>FAXING USING OUTLOOK</b>	<b>34</b>
<b>OFFICE 365 MIGRATION TECHNICAL USER TRAINING</b>	<b>36</b>
<b>MOBILE DEVICES</b>	<b>39</b>
<b>EMAIL AND CALENDAR DELEGATES</b>	<b>55</b>
<b>AUTODISCOVER DNS RECORDS</b>	<b>58</b>
<b>ADFS AUTHENTICATION TESTING</b>	<b>62</b>
<b>OFFICE 365 – ARCHIVE &amp; RETENTION POLICIES AND SCHEDULES</b>	<b>63</b>
<b>TERMS AND DESCRIPTION FOR OFFICE 365</b>	<b>65</b>
<b>LOGON CREDENTIAL CHANGES FOR EM DOMAIN USERS</b>	<b>70</b>
<b>OFFICE 365 CHANGING YOUR PASSWORD</b>	<b>71</b>
<b>MIGRATING FROM EM TO IDENTITY USER EXPERIENCE</b>	<b>75</b>
<b>OUTLOOK AUTO-COMPLETE CACHING</b>	<b>79</b>
<b>EMPLOYEE ONBOARDING, OFFBOARDING AND TRANSFERS</b>	<b>81</b>
<b>EMPLOYEE INTER-AGENCY TRANSFER</b>	<b>82</b>
<b>EMAIL PROCESS FLOW FOR TRANSFERRING EMPLOYEES</b>	<b>83</b>
<b>EMPLOYEE INTER-AGENCY TRANSFER GUIDE FOLLOW-UP</b>	<b>84</b>
<b>SLA FOR INCIDENT AND PROBLEM MANAGEMENT</b>	<b>85</b>
<b>ESCALATION PROCEDURES</b>	<b>86</b>
<b>PILOT ACTIVITIES AGENCY - POC EMAIL COMMUNICATION</b>	<b>87</b>
<b>PILOT GO LIVE CHECKLIST</b>	<b>88</b>
<b>USER ACCEPTANCE TESTING:</b>	<b>89</b>
<b>VELOCITY WEEK ACTIVITIES</b>	<b>124</b>
<b>VELOCITY GO LIVE CHECKLIST</b>	<b>125</b>

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	Faxing Section
1.6	02.13.2015	Mobile Device
1.6	02.13.2015	AutoDiscover
2.0	03.20.2015	Agencies Using Blackberries added
2.0	03.20.2015	AutoDiscover Pop-Ups added
2.0	03.20.2015	Calendar Permissions added
2.0	03.20.2015	In Place vs. Lit Hold replaced
2.0	03.20.2015	Office 365 in Virtual Environments added
2.0	03.20.2015	Outlook 365 in Shared Environments added
2.0	03.20.2015	Outlook 365 Mail Migration Terms and Description added
2.0	03.20.2015	Outlook Autocomplete Cache added
2.0	03.20.2015	Outlook Experience EM-ID Migration added
2.1	04.01.2015	Agencies Using Blackberries
2.1	04.01.2015	AutoDiscover Pop-Ups
2.1	04.01.2015	Calendar Permissions
2.1	04.01.2015	In Place vs. Lit Hold
2.1	04.01.2015	Mail Migration Terms and Descriptions
2.1	04.01.2015	Office ProPlus in Shared Environments
2.1	04.01.2015	Autocomplete Cache
2.1	04.01.2015	EM-ID Migration
2.2	04.16.2015	Removed irrelevant information from Pilot Activities Agency
2.3	01.08.2016	Replace current hyperlink for password reset tool

# AGENCY ENGAGEMENT

## OFFICE 365 REFERENCE GUIDE OVERVIEW

This reference guide, which includes an Agency checklist, will assist you in performing the necessary tasks associated with the Office 365 Agency email migration.

### Reference Guide Information

The reference guide provides information and instructional materials for your Agency's technical staff so that they may assist users and ready 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.

# OFFICE 365 INITIAL MIGRATION REPORT

## 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 State of Ohio User 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 State of Ohio User IDs
- Remediate Improperly Formatted UPN Values
- Consolidate and Match ID/EM Environmental Counterparts

# OFFICE 365 INITIAL MIGRATION REPORT

## 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

# OFFICE 365 INITIAL MIGRATION REPORT

## 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

# OFFICE 365 ADVISORY DOCUMENTS

# DESKTOP PATCHING REQUIREMENTS

Desktop patching requirements for a successful migration of email to the cloud, whether from the EM or the ID Domain include: Security, Operating System and Office patches.

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

## Web Browser Considerations

Microsoft has stated that only IE 10 and newer versions of Internet Explorer are supported for the Office 365 Email in the Cloud. The newer the browser and its version, the better performance can be expected.

## 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 and 8.1
- Windows 7

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

- Windows 8 and 8.1
- Windows 7

### Office 2007 with Service Pack 3

- Windows 8 and 8.1
- Windows 7

### Office for Mac 2011 with Service Pack 3

- Mac OS X 10.6 or later

### Mozilla Firefox and Google Chrome

- The latest version

### 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;

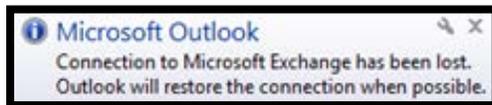
- Run the following edit on each and every account in your Agency

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

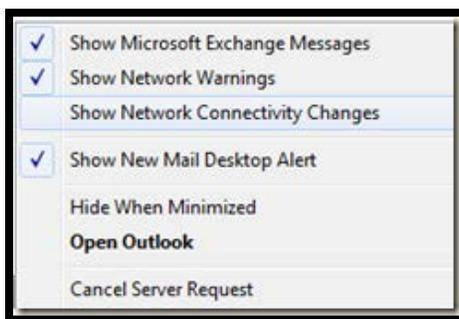
## Connectivity Balloon

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

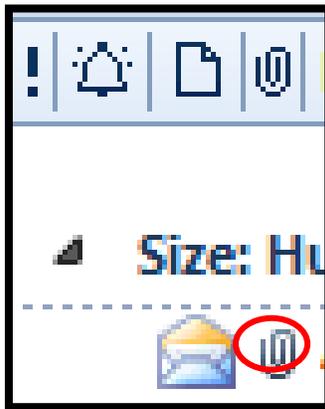
The 25MB restriction no longer applies as all mail up to 150MB can now be migrated to the Cloud. These larger emails can be viewed, searched and moved, but users are unable to send or forward email outside the user's mailbox.

### 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.

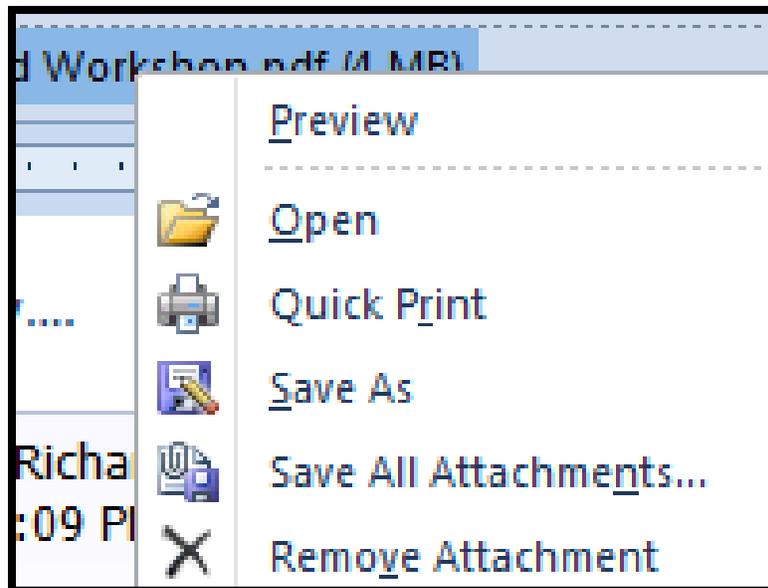
### Saving an Attachment

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.

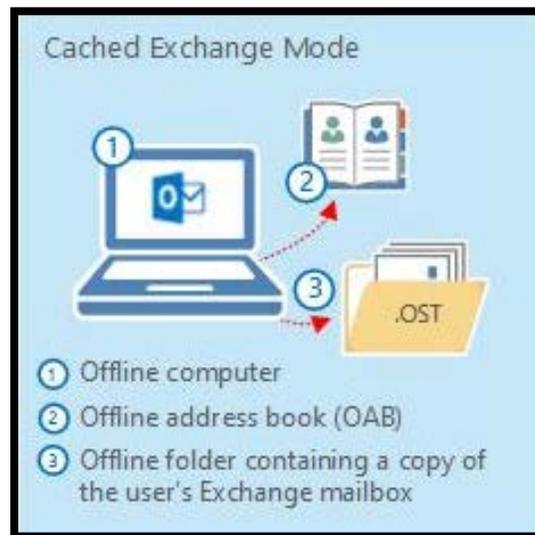
- Scroll to the location where you want to save the file
- Click **OK**

The file is now saved.

## OFFICE 365 IN VIRTUAL ENVIRONMENTS

Agencies using RDS (Remote Desktop Services), VDI (Virtual Desktop Infrastructure), or like technologies (running in either persistent or non-persistent mode) with Outlook 365 should be aware that Outlook in **online mode** will not provide optimal performance. For this reason, operating in **Cached Exchange Mode** is highly recommended. When running in **Cached Exchange Mode** there is always a local copy of a user's Exchange mailbox ready in an offline data file (.ost file) on the user's computer.

By default it is located in the C:\Users\\AppData\Local\Microsoft\Outlook folder.



Consequently, running in **Cached Exchange Mode** would greatly increase your storage requirements for each mailbox instance (as much as 50GB per mailbox).

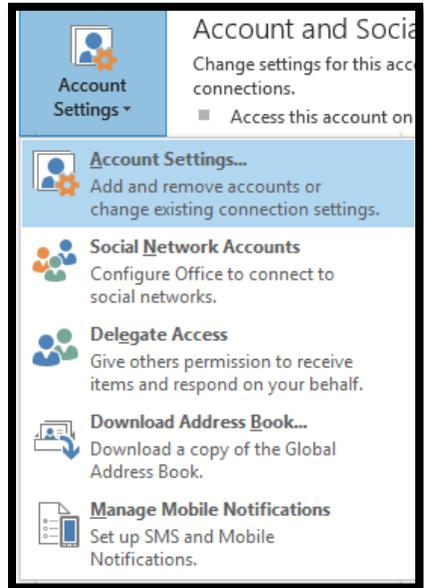
One suggested solution is to use the Outlook Web App (OWA); however, the OWA isn't as feature rich or as user-friendly as the desktop Outlook Client.

The recommended solution is to install Outlook 2013/Office ProPlus with the option to only sync the last month of emails, and/or utilize aggressive archive policies that keep the majority of the data in the online archive, which is not synced.

To follow are the steps to change the cached mode sync range in the individual Outlook 2013 client:

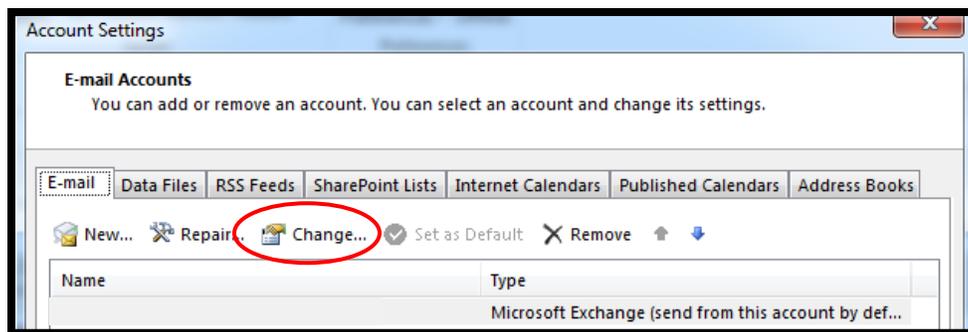
From the File Menu;

- Choose the **Account Settings** button
- Select **Account Settings**



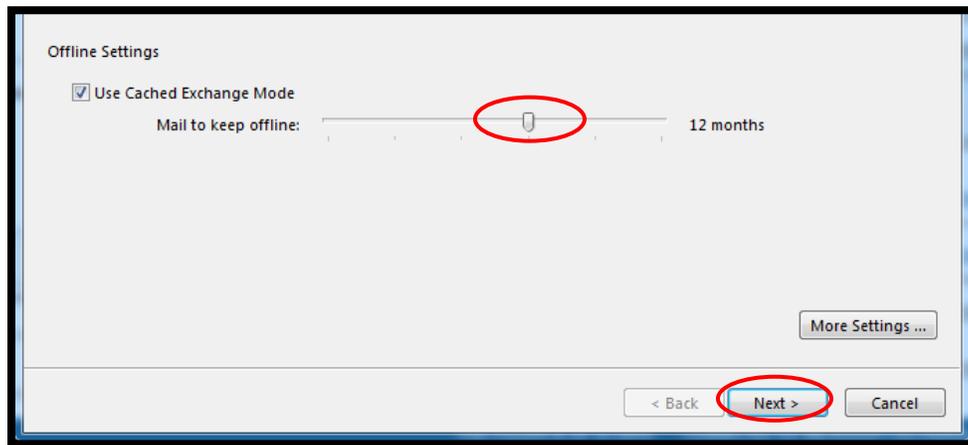
From the Account Settings Dialog Box;

- Select the **Microsoft Exchange account**
- Click **Change**



From the Change Account Dialog Box;

- Adjust the “Mail to keep offline” sync slider to 1 month



- Click **Next**
- Click **Finish**

When operating in cached mode only some mail will be immediately available to you. However, in your mail folder(s) you can see that all of your mail is accessible on the server:

*There are more items in this folder on the server*  
[Click here to view more on Microsoft Exchange](#)

## GROUP POLICY CACHED EXCHANGE MODE

As an administrator for your agency, you can set the Cached Exchange Mode and settings in Group Policy. The following Technet article outlines some configuration options:

<https://technet.microsoft.com/en-us/library/cc179175.aspx>

## To configure Cached Exchange Mode settings using Group Policy

In Group Policy;

- Load the **Outlook 2013 template**
- Open the **Group Policy Management Console (GPMC)**

In the tree view;

- Expand **Domains**
- Expand **Group Policy Objects**
- Right-click the **Policy Object**
- Click **Edit**

The Group Policy Management Editor window opens.

In the tree view;

- Expand **User Configuration**
- Expand **Administrative Templates**
- Expand **Microsoft Outlook 2013**
- Expand **Account Settings**
- Click **Exchange**
- Expand **Exchange**
- Click **Cached Exchange Mode**

In the reading pane, in the Setting column;

- Double click the **Policy**

For example, in the **Exchange** reading pane, open “**Use Cached Exchange Mode for new and existing Outlook profiles**”.

- Select **Enabled**
- Select an option (if appropriate).
- Click **OK**

## OFFICE PROPLUS IN SHARED ENVIRONMENTS

Many agencies have pcs that are shared by multiple users, while others have deployed user endpoints in a virtual desktop environment. To follow are some guidelines on how an agency can deploy Office ProPlus in a shared environment.

### Enabling Shared Activation

The Microsoft Office Deployment Tool, combined with a simple text file, can be used to install Office ProPlus on a shared computer and to enable shared computer activation for that computer.

Add the following lines when you create the configuration file:

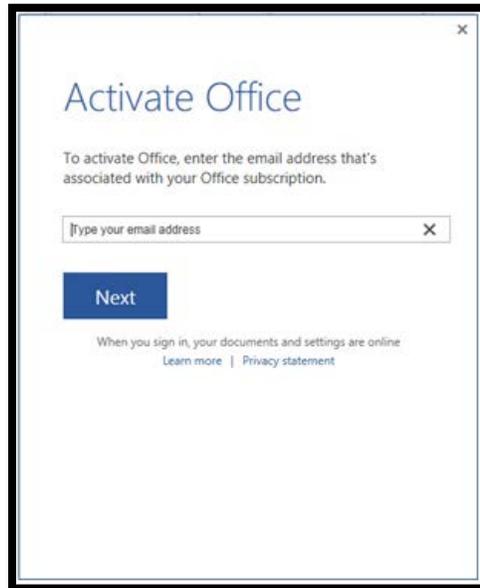
```
<Display Level="None" AcceptEULA="True" />  
<Property Name="SharedComputerLicensing" Value="1" />
```

When Office ProPlus is deployed using a Managed Deployment method such as the Office Deployment Tool or SCCM, shared computers would be configured using the above version of the configuration file to allow for shared activation.

After Office ProPlus is deployed and a user signs into an Office ProPlus program (i.e., Word) on the shared computer the following occurs:

Office ProPlus contacts the Office Licensing Service on the Internet to obtain a licensing token for the user. To determine whether the user is licensed to use Office ProPlus, the Office Licensing Service has to know the user's account information.

In the State of Ohio deployment this account information is synced through FIM; however, in some cases, the user might see the Activate Office dialog box below.



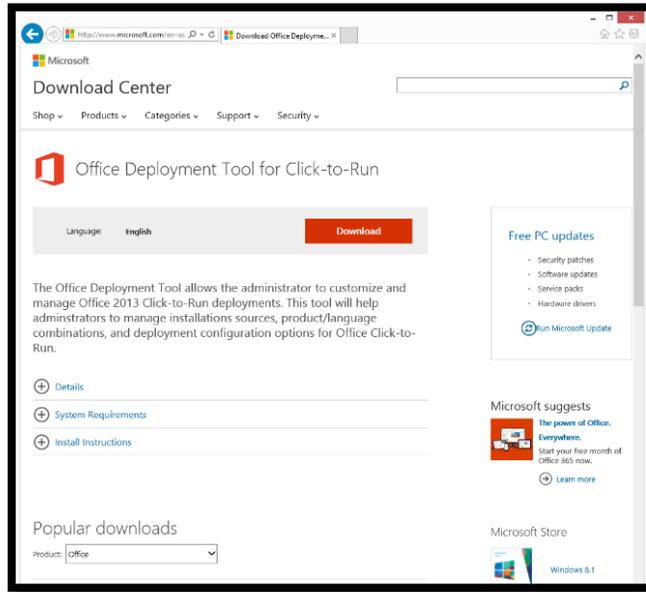
If the user is licensed for Office ProPlus, a licensing token is stored on the computer in the user's profile folder, and Office ProPlus is activated. The user can now use Office ProPlus.

## Microsoft Office Deployment Tool

The Microsoft Office Deployment Tool is a command line tool that enables you to download Office ProPlus source files and install them on a series of desktops.

Among other things, it allows an administrator to:

- Specify the source location for Office
- Specify version, architecture (32 bit vs 64 bit) and language
- Manage the update process



The Office Deployment Tool executable (setup.exe) has the following options:

Option	Description
/download	Download a full version of ProPlus from the Microsoft CDN
/configure	Install ProPlus
/package	Create an app-v package
/help	Get help and options

The configuration.xml file allows administrators to customize the download and installation and allows for the following:

- Product and languages to install or remove
- Source path
- Level of user interface to display
- Logging options
- Product updates behavior

For more information regarding the use of the Office Deployment Tool reference the following Technet article:

[http://technet.microsoft.com/en-us/library/jj219422\(v=office.15\).aspx](http://technet.microsoft.com/en-us/library/jj219422(v=office.15).aspx)

## RESOURCE AND SHARED MAILBOXES

The Office 365 team wants to help facilitate a smooth transition to the State's new Private Cloud service offering. To prepare for the OFFICE 365 migration, Agencies need to identify and process all "Shared" and "Resource" mailboxes.

### RESOURCE AND SHARED MAILBOXES

#### Shared mailboxes (Resource) in Exchange 2010

- These mailboxes will migrate as resource mailboxes and no cost is associated.
- Naming changes may be applied to the mailbox. It is preferred that all Agency resource mailboxes begin with the Agency's three letter prefix, however this is not a requirement prior to migrating to Office365.
- Resource mailboxes cannot exceed a 50GB limit.

#### User mailboxes created in Exchange 2010 and shared by multiple users

- It is preferred that all mailboxes shared by multiple users be converted to shared.
- These mailboxes will migrate to Office 365; however, a monthly cost is associated with the mailboxes that have not been converted.
- Shared mailboxes that are 50GB or less in size do not require a license. If they exceed 50GB, you will be charged for a full license.
- In the cloud, user mailboxes being used as shared mailboxes are set up so that a user must sign in to his/her own mailbox and then open the shared mailbox using "Full Access" permissions.

#### Room and equipment resource mailboxes that require request approvals

- If "delegate access" is granted to a user as defined in the Agency AD, for example, jsmith, then those delegates will migrate as SOUID.
- Delegated permissions for individual mailboxes will migrate to Office 365 with no changes needed.

## Tasks to Prepare for Migration

- Identify all resource mailboxes over the 50 GB limit and cleanup the mailbox.
- Add the Agency three digit prefix to all resource mailboxes, as needed.
- Identify all room and resource mailboxes with delegate approvals and make a note of the approvers. Delegates may be added to the mailboxes after migration to the cloud.
- Convert shared user mailboxes to shared resource mailboxes prior to migrating.

## Resource Mailbox Naming

For naming convention, all resource mailboxes should begin with the Agency three letter prefix.

After migrating to the cloud, resource mailboxes created in Outlook 2010 may migrate with changes to the primary Simple Mail Transfer Protocol (SMTP) address and display the name in the Global Address List (GAL). These changes apply to shared, room and equipment mailboxes.

Migrated Resource Mailbox
<b>GAL:</b> If Agency prefix is used in Outlook 2010, then the prefix will migrate, but no dash will be added. For example, DOT Audit Requests
<b>SMTP Example:</b> audit-requests@

## How Will Shared Mailboxes Work in Office 365?

In Office 365, a shared mailbox:

- Does not have a username and password, so users cannot log on to it directly. A user must sign in to their mailbox and then open the shared mailbox using “Full Access” permissions.
- Does not require a license, but each user that accesses a shared mailbox must be assigned to a subscription plan.
- Cannot be accessed by users with Exchange Online Kiosk subscriptions.
- Has a maximum size of 50 GB.
- Can be used to store emails sent to and received by the shared mailbox.
- Can be used to store data migrated from on-premises public folders.
- Cannot be used to archive emails for individual users.

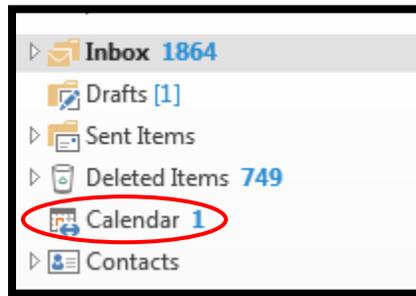
# SHARING OUTLOOK CALENDARS

During your Agency’s migration, project mailbox calendar permissions are migrated with each account by default. In the event that permission migration was missed, the following steps can be used to set permissions manually.

These instructions were created using Outlook 2010, but can be used as a reference for Outlook 2013 as well.

## Setting Permissions Manually

- Launch the Outlook program and navigate to your **Calendars** in the **Navigation** pane.



- Select the **Calendar** you would like to update in the **Navigation** pane.

**Note:** If you are not able to change sharing permissions on a calendar, you may not have full permissions or “own” the Calendar.

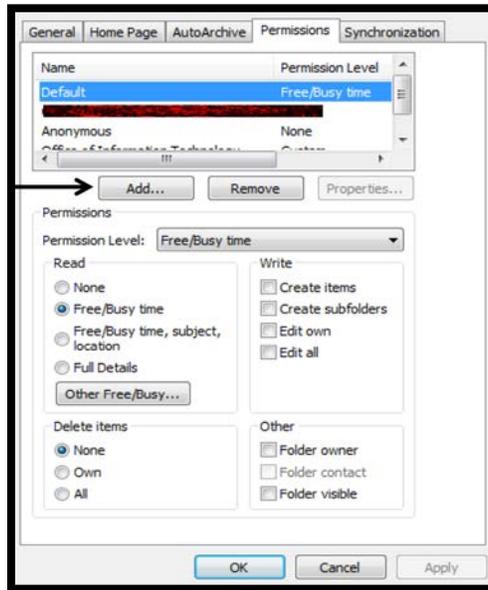
- Click the **Calendar Permissions** icon.



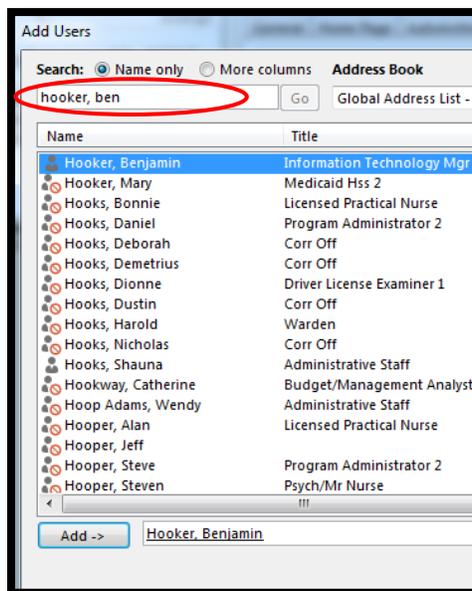
If the name of the person you would like to share the selected calendar with is not already listed;

- Click the **Add** button

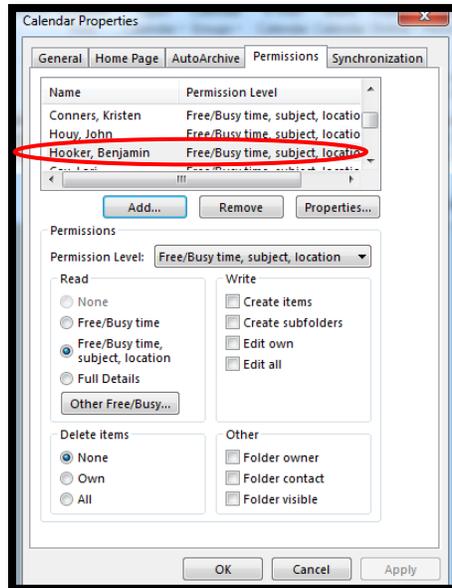
**Note:** If the individuals are already listed and you would like to adjust their permission level jump to Step 6.



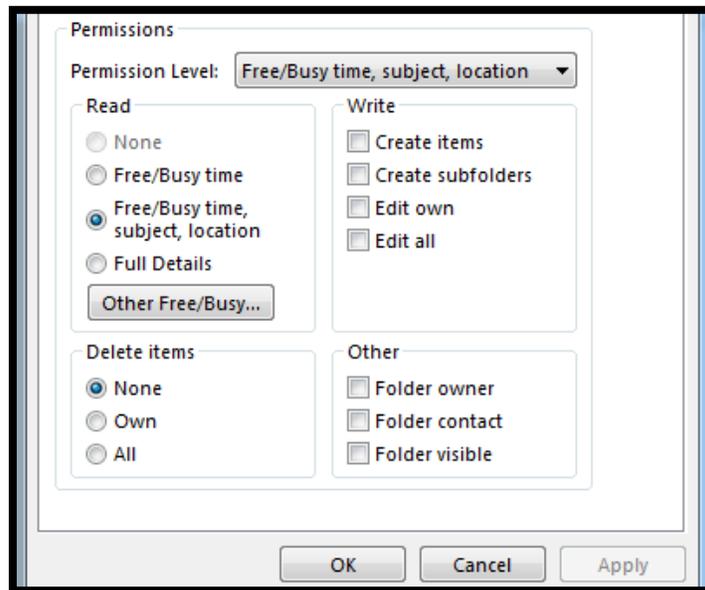
- Find the people you would like to have access to your calendar by typing the name in the search field.



- Select the individual's name in the list and then select a Permission Level from the drop down menu.



**Note:** Custom or specific permission levels can be set by editing the options.



## PERMISSION LEVELS:

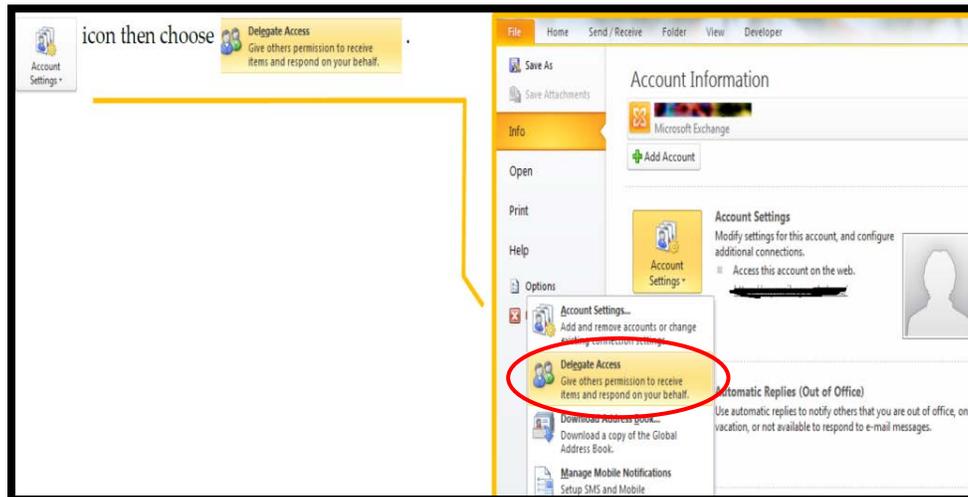
- **None** - the person cannot see any information related to your calendar
- **Free/Busy time** – the person can see when you are free or busy only
- **Free/Busy time, subject, location** - the person can see the time, subject, and location of your appointments
- **Contributor** - the person can put appointments on your calendar but cannot see details of existing appointments
- **Reviewer** - the person can read everything related to an appointment (except a private one) and see folders, but not subfolders
- **Non-editing Author** - the person can see appointment details, create appointments (but not folders), and delete the appointments they created
- **Author** - the person can see appointment details, create appointments, edit appointments they created, and delete appointments they created
- **Publishing Author** - the person can do everything an Author can, plus create subfolders
- **Editor** - the person can create items, edit all appointments, delete any appointment, and see the full details of all appointments
- **Publishing Editor** - the person can do everything an Editor can, plus create subfolders
- **Owner** - the person will have the same permissions to your calendar that you have

## DELEGATING ACCESS

Delegating access allows users to grant “admin assistant” type permissions. Those who are granted “delegate access” are allowed to view, edit, accept, send and respond to mail items on your behalf. This access can include the Inbox, Calendar, Tasks, Contacts, and Notes. You can select multiple delegates to have access to your account and individually set the permissions for each delegate.

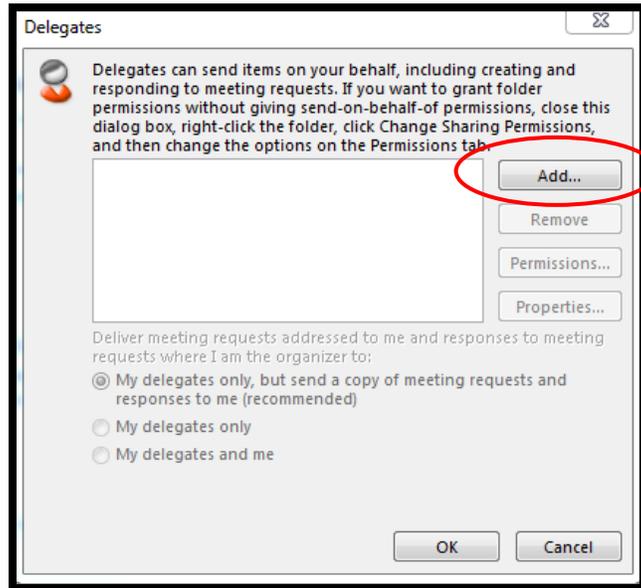
From Outlook;

- Navigate to the **File** tab
- Select the **Account Settings** icon
- Choose **Delegate Access**



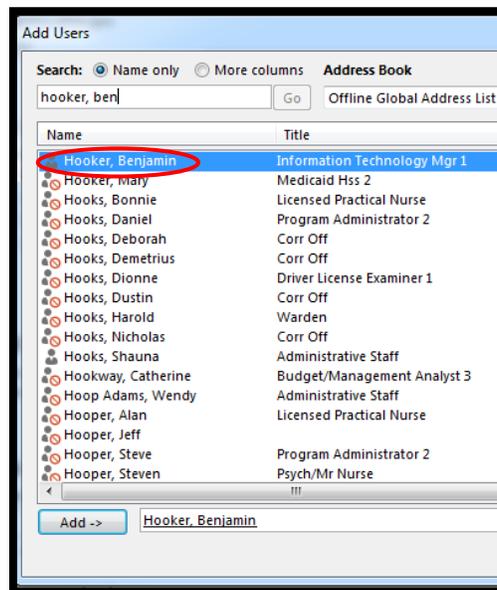
In the Delegates dialog box;

- Click the **Add** button

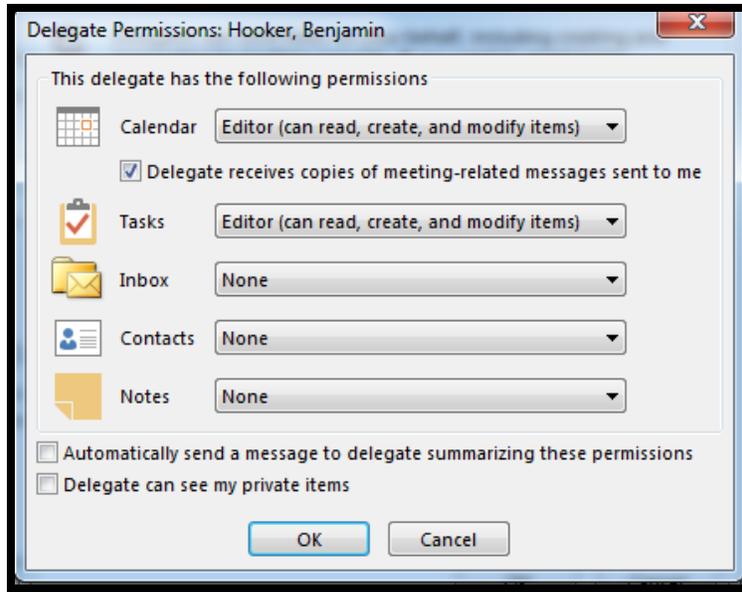


From the **Add Users** dialog box;

- Find and add the users to whom you would like to delegate access.



- Select the desired level of delegation for each folder option



➤ Click **OK** twice

# FAXING USING OUTLOOK

## OVERVIEW

Below are the two methods for faxing from the Outlook\OWA accounts in Office 365. The *Simple Addressing Scheme* only inserts the fax number you are sending to and your email address on the cover sheet of the fax. If you require more information on the cover sheet such as the recipient's name, your phone number, company name, etc. then the *RightFax Addressing Scheme* will provide that functionality.

### Example:

Simple addressing scheme = [6145551212@send.fax](mailto:6145551212@send.fax)

RightFax addressing scheme= [/fax=614-555-1212/voice=614-555-1111/name=First\\_Last@send.fax](mailto:/fax=614-555-1212/voice=614-555-1111/name=First_Last@send.fax)

## Simple Email Fax Addressing Scheme:

The Simple Email Fax Addressing scheme allows fax-bound email messages to be addressed using a format that is similar to standard Email addressing - <fax number>@[domain.com](mailto:domain.com)

### Example:

To send a fax-bound Email message to the fax number 555-1212 with a domain of Send.fax, the address format is: [5551212@Send.fax](mailto:5551212@Send.fax)

## RightFax Addressing Scheme:

The RightFax addressing scheme allows a great deal of flexibility in how fax-bound email messages are addressed.

Use these rules to address fax messages using the RightFax addressing scheme:

- The first forward-slash encountered in the address indicates the beginning of the fax destination information.
- Each element of fax information (such as name and fax number) is separated by a forward-slash.
- Addressing elements can appear in any order (i.e., the fax number can come either before or after the name).
- Addressing elements cannot be separated by the RightFax mailbox address itself.
- A fax recipient name and destination fax number are required. If either element is not found, the message is discarded.
- The last element of fax information must be terminated by either a forward-slash (/), an '@' symbol, or the end of the line. This allows any character to be part of a fax information element, including spaces.

The following table lists all fax destination elements supported by the RightFax addressing scheme. Only the fax number and name elements are required. Except for the fax number, all of these addressing elements are used only for display on the fax cover sheet.

Element	Definition	Example
/bi1=	Billing code 1	/bi1=1111
/bi2=	Billing code 2	/bi2=2222
/city=	Recipient city, state	/city=Tucson, AZ
/com=	Recipient company name	/com=Acme, Inc.
/fax=	Destination fax number	/fax=555-1212
/name=	Recipient name	/name=Jane Doe
/voice=	Recipient voice number	/voice=555-4567

### Examples:

/name=Jane/fax=555-1212/ <fax@oit.ohio.gov>  
 /fax=5551212/name=Jane/com=Acme/ <fax@oit.ohio.gov>

# 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 are currently 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.

OFFICE 365 FIM Portal Training Outline
<b>User Creation and Portal Overview</b>
User creation and synchronization
Logging into FIM Portal
Home page overview
<b>Distribution Groups</b>
Create new distribution groups
Create new manually populated distribution group
Manage users
Manage Owners and Co-Owners
Create Dynamic Distribution group
Manage Criteria
Manage Owners and Co-Owners
Finding your distribution groups
Advanced search functions
Modifying distribution groups
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
<b>Service Accounts</b>
Creating new service account
Finding service accounts
Advanced search functions
Editing service accounts
<b>Admin Accounts</b>
Creating new admin account
Finding admin accounts
Advanced search functions
Editing admin accounts
<b>Administrator Password Reset</b>
Accessing password.ohio.gov/admin
Resetting a user or contractor account password
Resetting other and county worker passwords
Resetting admin and service account passwords
<b>User Self-Service Password Reset</b>
Accessing password registration site
Accessing password reset site

# MOBILE DEVICES

Agencies must confirm the list of Mobile Devices prior to migration and take steps to remediate mobile devices after migrating from EM to ID and/or from ID to the Cloud.

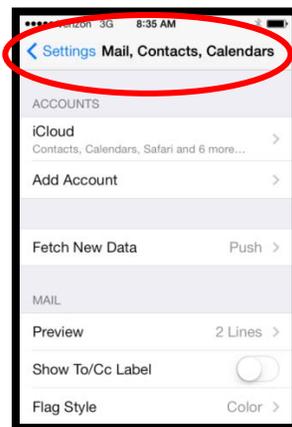
## MOBILE DEVICE SETUP FOR OFFICE 365

This document details the setup for iPhone and Android devices and is intended for IT Support personnel.

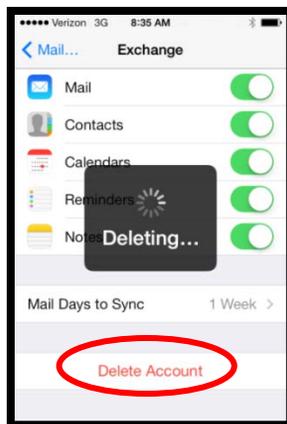
### Setting up Email on an iPhone if Using Active Sync

From the iPhone you are configuring;

- Select **Mail, Contacts, Calendars**

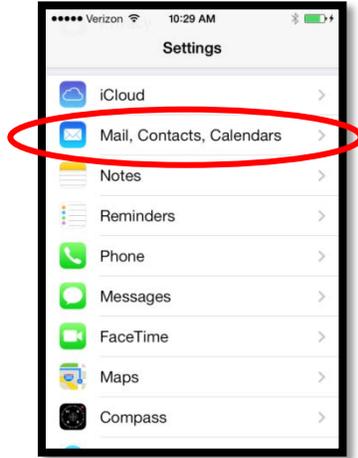


- If necessary, Delete the current account

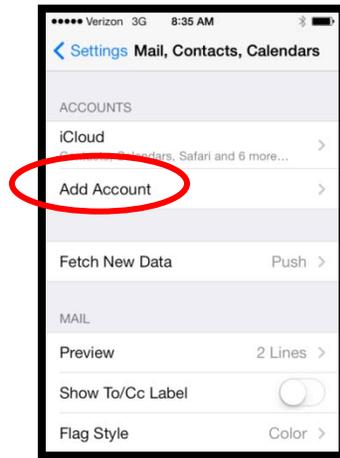


To add a new account;

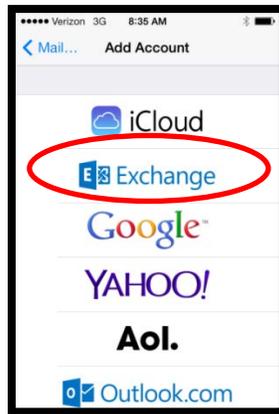
- Select **Mail, Contact, Calendars**



- Click **Add Account**



- Select **Exchange**



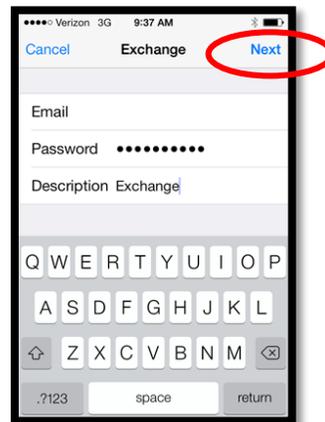
➤ Click **Add Account**



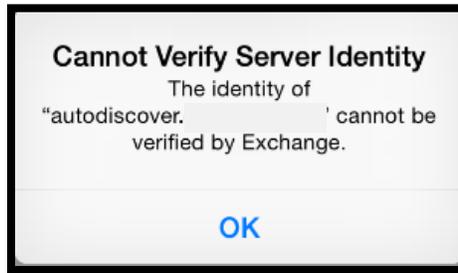
➤ Enter the following information:

- **Email** – Enter your email address (e.g.: [John.Smith@DAS.ohio.gov](mailto:John.Smith@DAS.ohio.gov))
- **Password** – Enter your SOUID (myohio.gov) password

➤ Choose **Next**



- It is possible that you will receive the following AutoDiscover error:



**Note:** You may be asked for more information in the Advanced Settings.

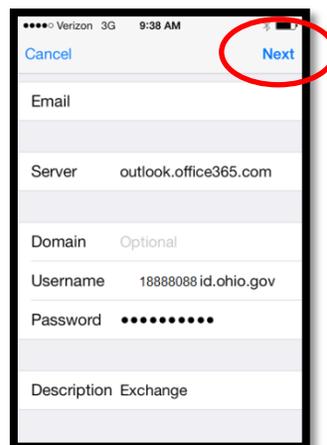
- Enter the following information as needed:
  - If migrating from EM to ID:

Server	mail.ohio.gov
Username	Your <a href="mailto:SQUID@id.ohio.gov">SQUID@id.ohio.gov</a>
Password	Your SQUID password

- If migrating from ID to the Cloud:

Server	outlook.office365.com
Username	Your <a href="mailto:SQUID@id.ohio.gov">SQUID@id.ohio.gov</a>
Password	Your SQUID password

- Click **Next**



Your device will search for the information needed to set up your account.

- Go to the next step when your settings are found
- Select the features to synchronize with your mobile device
- Click **Save**

**Note:** By default, Mail, Contacts, and Calendar information are synchronized.

The iPhone configuration is complete.

## Setting up Email on an Android if Using Active Sync

You can connect to your Office 365 on an Android phone or tablet. When you set up an Exchange account on your Android, you will be able to access and synchronize your email, calendar and contacts. If you only want to use email, you can set up POP or IMAP email on an Android. If the current account information is not editable, you will need to delete the account and re-add it.

**Note:** There are several different types of Android devices; therefore, these configuration steps and example pictures are to be considered as a general guideline.

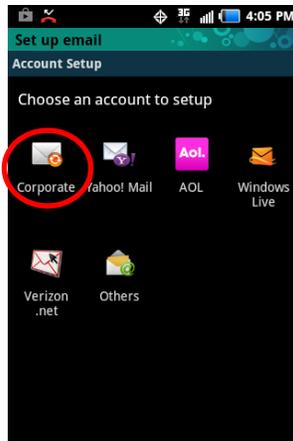
To add a new account from the Android you are configuring:

- Click the **Email** icon

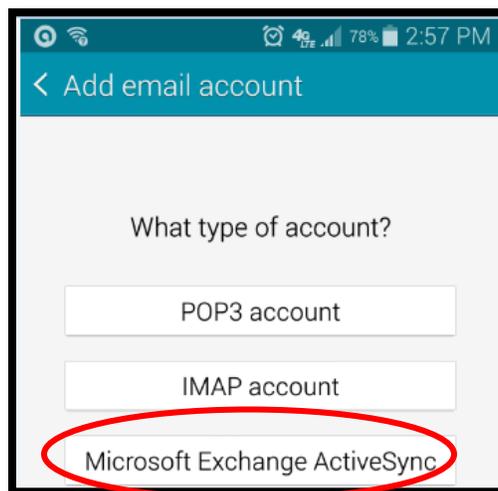


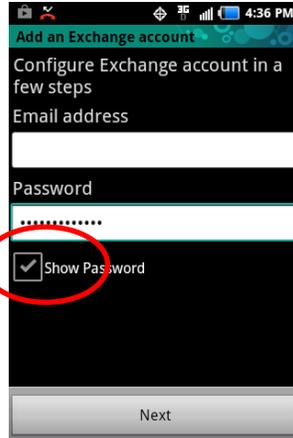
This application may be named “Mail” on some versions of Android.

- Click the **Mail** or **Corporate** icon.



- Enter the following account information:
  - **Email** – Enter your email address (e.g.: [John.Smith@DAS.ohio.gov](mailto:John.Smith@DAS.ohio.gov))
  - **Password** – Enter your SOUID (myohio.gov) password
- Click **Next**
- Some devices will ask you what type of account to set up.
- Choose **Microsoft Exchange ActiveSync**





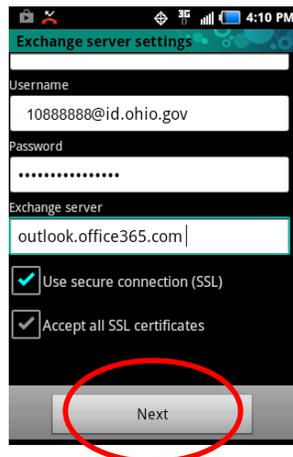
- Enter the following as needed:
- If migrating from EM to ID:

Server	mail.ohio.gov
Username	Your <a href="#">SQUID@id.ohio.gov</a>
Password	Your SQUID password

- If migrating from ID to the Cloud:

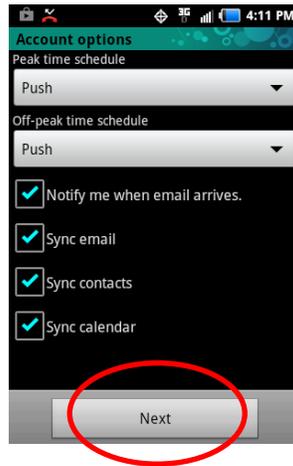
Server	outlook.office365.com
Username	Your <a href="#">SQUID@id.ohio.gov</a>
Password	Your SQUID password

- Click **Next**

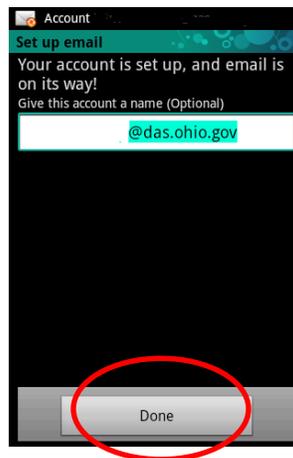


As soon as your phone verifies the server settings, the Account Options screen displays. The options available depend on the version of Android on your device.

- Accept the default settings
- Click **Next**

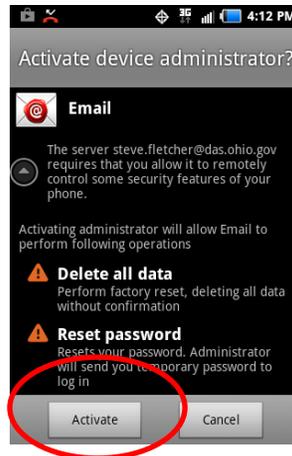


- Click **Done**



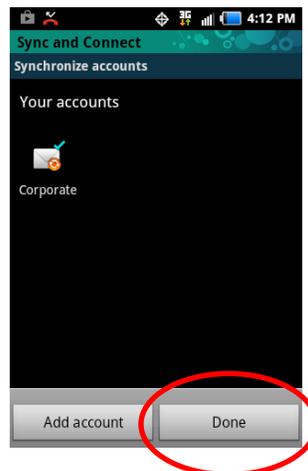
A message appears, asking if you want to activate device administrator.

- Click **Activate**



From the Sync and Connect screen;

- Click **Done** to complete the email setup and start using your account



## Managing Devices with Airwatch

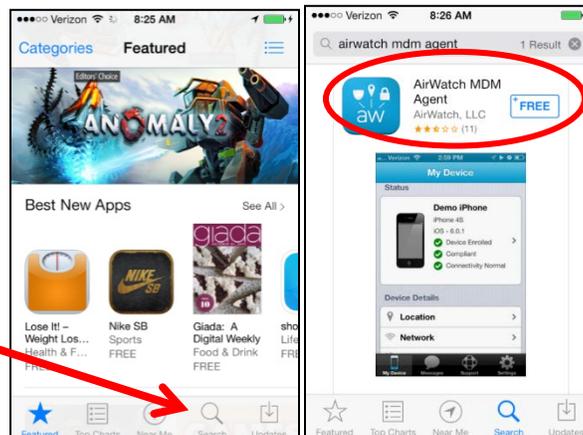
The instructions below detail the steps for installing Airwatch on an iPhone. However, they can also be used for installing Airwatch on an Android device; the steps are not significantly different.

From the main screen;

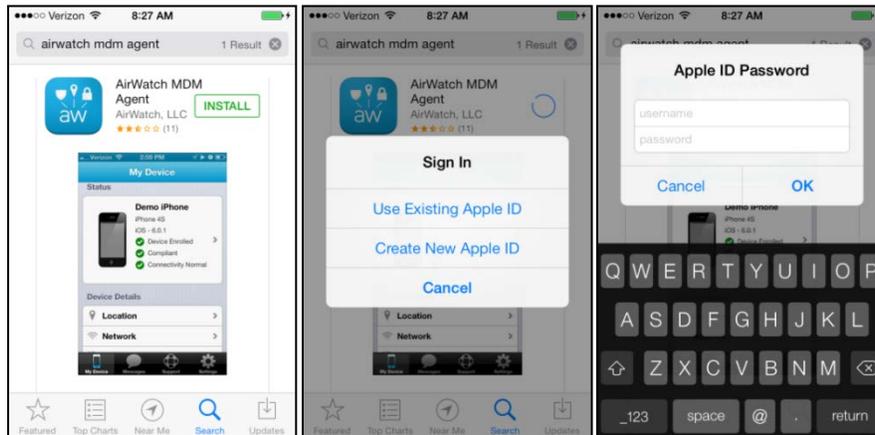
- Select the **App Store**



- Select the **Search** icon to look for the Airwatch MDM Agent in the App Store



- Install the **Airwatch MDM Agent** using your existing Apple ID and password

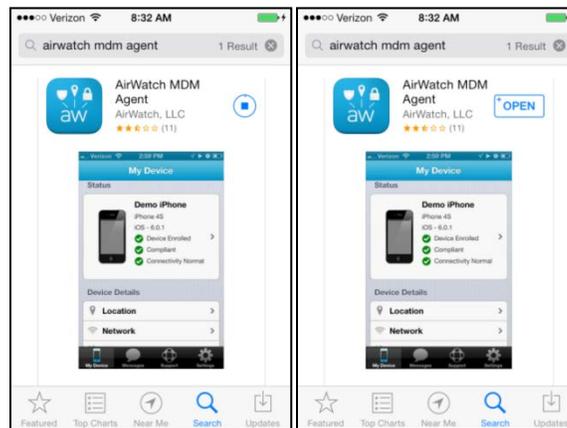


- Click **Next**

The Airwatch MDM Agent installs.

## To Configure the Airwatch Application

- Open the **Airwatch** application.

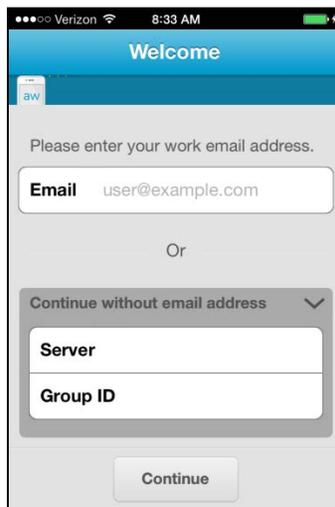


- Click **“Continue without email address”**



In the Server text box;

- Enter the Server URL - `mdm.ohio.gov`



If your Agency uses groups:

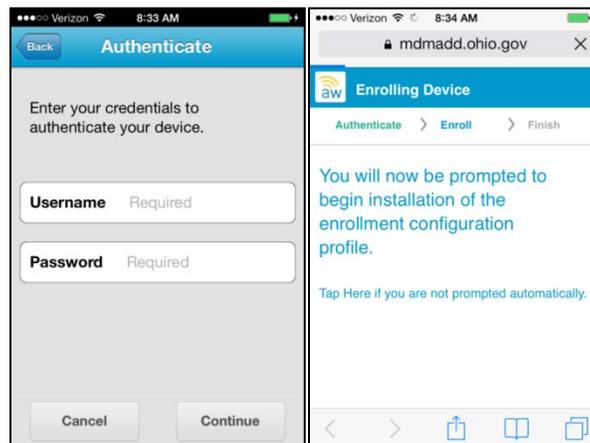
- Enter the appropriate Group ID



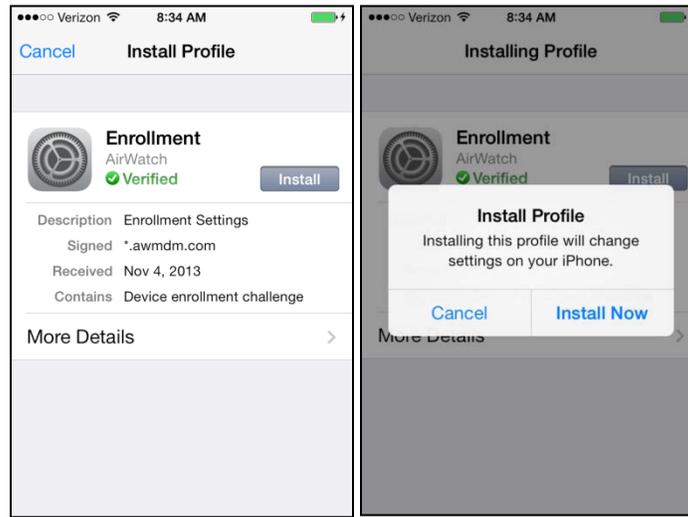
**Note: The steps below may vary by Agency**

- Complete the end user enrollment
- Enter the end user's Active Directory username and password

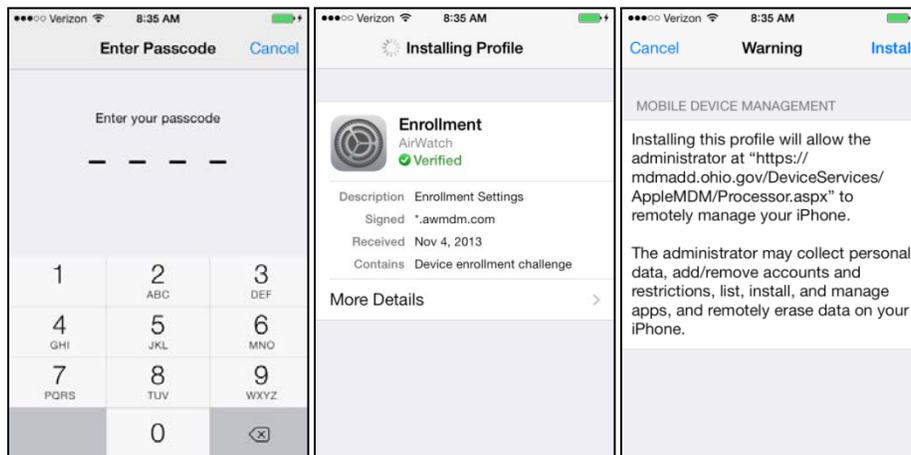
**Note: iOS will try to autocorrect the end users account name. Double check the input.**



➤ Install the **MDM Profile**



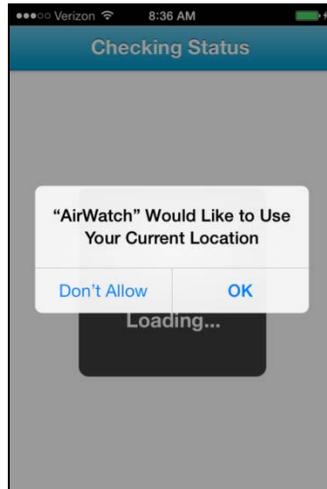
The device prompts you to enter the passcode of the device, after it is entered, the Profile installation begins.



The Profile installation is complete.



- Enter security information
- Click **OK** to allow AirWatch to use your current location



## For Agencies Using Blackberries

During the migration, the technical engineer will send a remote wipe command and inform you of the time it was sent. If in the event the wipe command is not received (for example; bad reception or low battery) the wipe will need to be initiated by the end users or by tier one support.

On the device:

- Navigate to Options > Security > Security wipe

**OR**

- Visit the following video tutorial: [security wipe video](#)

**Note:** Anything stored locally on the device will be lost.

In order to reactivate the device,

- View the following video: [How to Enterprise Activate your BB device](#)

**Note:** Your activation password will be your three letter Agency code (for example, DAS)

When the devices are re-activated on the ID system, the contacts from their Outlook client will re-synch with the phone.

## EMAIL AND CALENDAR DELEGATES

You may be a delegate to someone else's mailbox or calendar, or you may have a delegate for your mailbox.

### Delegates – Information before Migration

- During the Office 365 email migration, mailbox owners and their delegates must be migrated in the same wave.
- For most Agencies, delegate permissions will migrate with the mailbox and do NOT have to be reapplied.

### ODOT, OBM and ODH

- Delegate permissions for ODOT, OBM, and ODH users may NOT migrate. Before migration, please make a note of your delegates and their permission levels. You may then need to reapply them after migration.
- ODOT, OBM, and ODH users with “Full Send As and Receive” permissions can only be reapplied by IT support personnel. If you have a delegate with full access to your mailbox or calendar, then those permissions should be noted. After migration, your IT support personnel can work with OIT to reassign “Full Send As and Receive” permissions.
- If an ODOT, OBM, or ODH user creates a new profile, they will need to re-add the mailbox to their profile.

## Delegate Permission Levels

A mailbox owner can determine the access level of each delegate. Delegate permissions can be granted to read, create, change and delete items in the owner's folder. By default, when the mailbox owner adds a delegate, the delegate has full access to the owner's Calendar and Tasks folders. The delegate can also respond to meeting requests on the owner's behalf.

The mailbox owner can assign delegate permission levels as follows:

- **Reviewer** - The delegate can read items in the manager's folder.
- **Author** - The delegate can read, create, change and delete items that he or she creates. For example, a delegate can create task requests and meeting requests directly in the manager's Task or Calendar folder and then send the item on the manager's behalf.
- **Editor** - The delegate can do everything that an Author has permission to do and may also change and delete the items that the manager created.
- **Full Send As and Receive** – The delegate can send emails and meeting invitations as the mailbox owner. Emails are NOT sent on behalf of the owner, but as the owner.

**Note: Only Outlook Administrators can assign Full Send As and Receive permissions.**

## Finding a Mailbox Delegate and Permission Level – (ODOT, ODH and OBM)

ODOT, ODH and OBM users must make a note of their delegates. To view your delegates and their permission levels, perform the following steps in Outlook.

- Select the **File** tab
- Select **Account Settings**
- Select **Delegate Access**
- Choose the name of the delegate
- Select **Permissions**
- Note the permission level assigned to the delegate
- Continue until you have recorded all of your delegates and their permission levels.

**Note:** If a delegate is to receive copies of your meeting requests and responses, they need "Editor" permission to your "Calendar" folder. Be sure to select the "Delegate receives copies of meeting-related messages sent to me" check box.

## Adding Delegates after Migration

### (ODOT, ODH and OBM)

After migration to the cloud, ODOT, ODH and OBM need to verify that their delegate permissions migrated to the cloud. If permissions did not migrate, follow the steps below to add the needed delegates.

- Select the **File** tab
- Select **Account Settings**
- Select **Delegate Access**
- Select **Add**
- Key the name of the delegate or search for the name in the search results list

**Note: The delegate must be a person in your organization's Global Address List.**

- Select **Add**
- Select **OK**
- In the "Delegate Permissions" dialog box, accept the default permission settings or select custom access levels for Exchange folders

If a delegate needs permission to work with meeting requests and responses ONLY, the default permission settings are sufficient. You can leave the Inbox permission setting at "None". Meeting requests and responses will go directly to the delegate's Inbox.

By default, the delegate is granted "Editor" permission to your Calendar folder. When the delegate responds to a meeting on your behalf, it is automatically added to your Calendar folder.

To send a message to notify the delegate of the changed permissions;

- Select the "**Automatically send a message to delegate summarizing these permissions**" check box.

**Note: An option to have the Delegate see private items is available via a checkbox.**

## AUTODISCOVER DNS RECORDS

During the Office 365 migration, it is important for Agencies who manage their own Domain Name System (DNS) to ensure proper name resolution to the mail server(s) responsible for accepting and prioritizing mail delivery.

The AutoDiscover service provides an easy way for the Outlook client application to configure itself with minimal user input. AutoDiscover will communicate with the server retrieving the necessary user account information allowing the client to be quickly configured.

If AutoDiscover is not set up correctly, manually created mailboxes using the Outlook client will **not** work after migrating to Office 365.

**Note: Do NOT input this change until the weekend of your scheduled migration!**

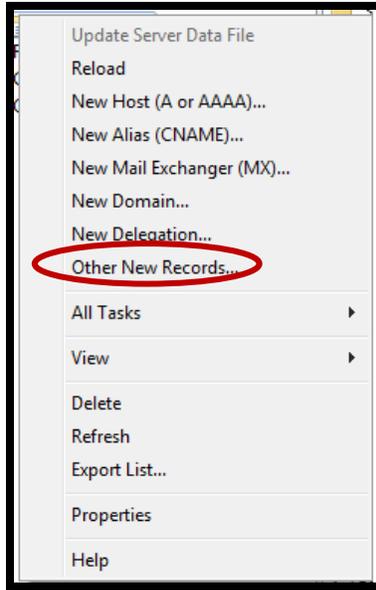
Within your DNS forward lookup zone, create the following record type:

**SRV Record - With the following Settings:**

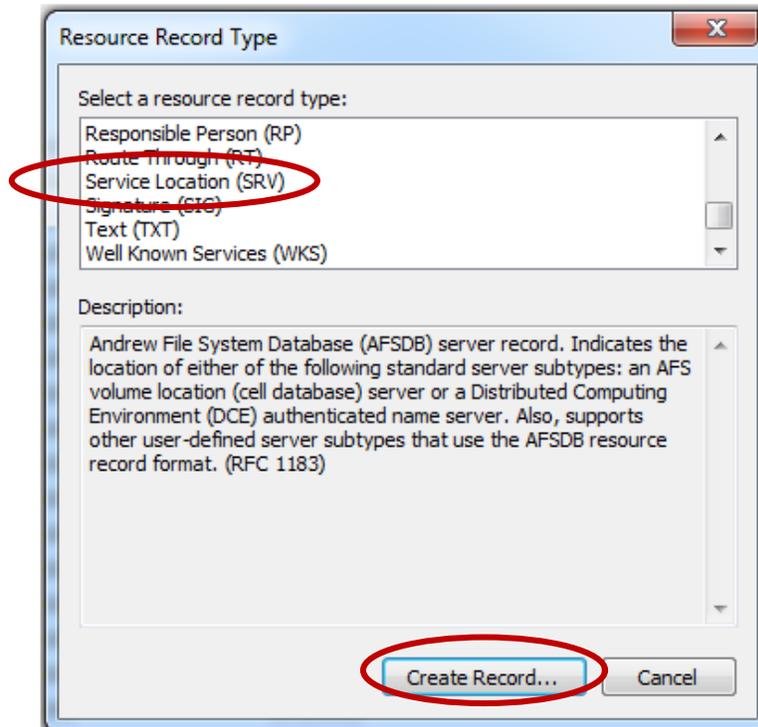
```
Domain: yourdomain.ohio.gov
Service: _autodiscover
Protocol: _tcp
Priority: 0
Weight: 0
Port Number: 443
Host Offering this service: mail.ohio.gov
```

From the DNS mmc;

- Right-click the **forward lookup zone**
- Choose "**Other New Records...**"



- Choose **Service Location (SRV)**
- Click **Create Record...**



**New Resource Record**

Service Location (SRV)

Domain:

Service:

Protocol:

Priority:

Weight:

Port number:

Host offering this service:

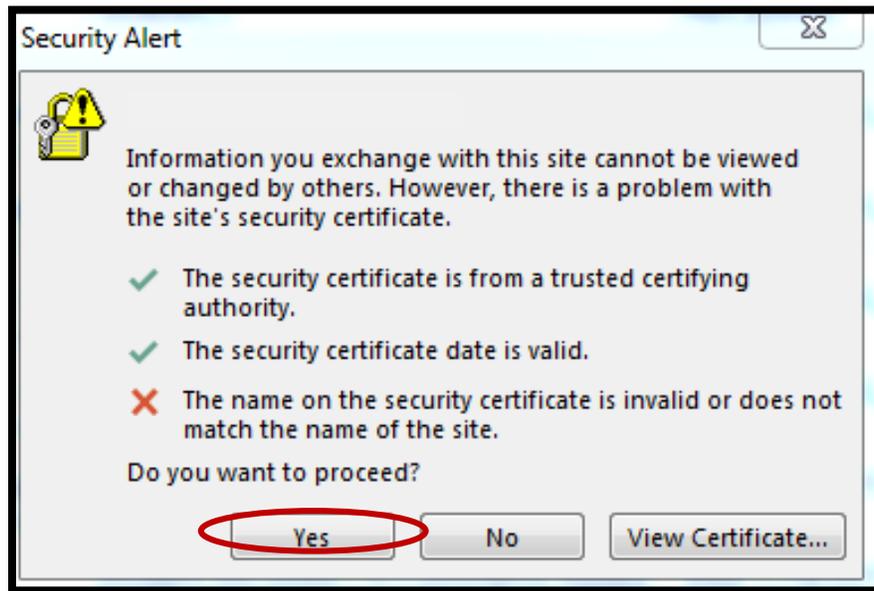
Allow any authenticated user to update all DNS records with the same name. This setting applies only to DNS records for a new name.

- Enter the settings shown above
- Click **OK**

**Note:** If your Agency's DNS is managed by OIT, please inform your lead OIT Exchange Administrator so that they can submit this change to the CSC on your behalf.

## Allowing AutoDiscover

Once AutoDiscover is in place, users may receive the following notifications once they open Outlook and log into their email accounts:



- Click **Yes**



- Click to add a checkmark in the **“Don't ask me about this website again”**
- Choose **Allow**

To learn how to suppress this pop-up, please reference the following knowledge base article:

<http://support.microsoft.com/kb/2480582>

# ADFS AUTHENTICATION TESTING

The ADFS Authentication Test requires IE9 or greater.

- Open Internet Explorer
- Proceed to the following link: <https://adfs.ohio.gov/adfs/ls/IdpInitiatedSignon.aspx>
- Click on “**Sign in**”



- Enter your ID and password using the following format:

ID	SOUID@id.ohio.gov
Password	SOUID password

**Note:** Your State of Ohio User ID (SOUID), formerly known as OAKS ID, is an 8-digit number.

If you can successfully log on, then the ADFS Authentication test was successful.

# OFFICE 365 – ARCHIVE & RETENTION POLICIES AND SCHEDULES

## ARCHIVE & RETENTION POLICIES

Archive and retention policies can be applied at the Agency level or by users for their mailbox.

Agency archive and retention policies in OIT's Exchange environment will migrate to the cloud. These policies will be disabled the first 30 days in the cloud to allow for verification that all data planned to be migrated has been migrated. After 30 days, the Archive and Retention policies will be re-enabled.

Individuals may have created personal archive and retention schedules. These personal archive and retention settings will not migrate.

## RECREATE POLICIES

An Agency may choose to have their current policies recreated in the cloud. The pre-migration checklist will allow you to select this option.

## CREATE NEW POLICIES

Agencies that do not currently have archiving turned on may do so after migration. To learn more about archive and retention schedules for Ohio, see the next section.

## ARCHIVE AND RETENTION SCHEDULES

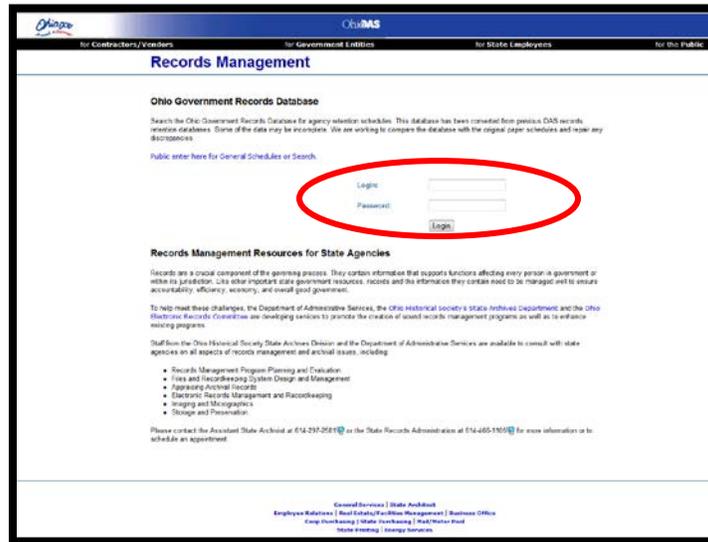
The State maintains a General Schedule List of archive and retention policies for statewide compliance. In addition, Agencies and commissions may have Agency-specific schedules.

To view or research state schedules - <http://apps.das.ohio.gov/rims/default/Default.asp>

At the Records Management page;

- Choose the “Public enter here for General Schedules or Search” link on the left side of the Records Management screen.

- Contact DAS to log into the site with an account and password



At the State of Ohio Records Management page:

- Click on the “General Schedule List”



- View Agency specific schedules or all statewide schedules by category



# 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.

## IN-PLACE HOLD VS. LITIGATION HOLD

When a reasonable expectation of litigation exists, Agencies may be required to preserve email that is relevant to the case. There are two options that can be used to specify the type of “hold” that needed to apply to your Agency’s mailboxes:

- **Litigation Hold** - Only allows the entire mailbox to be placed on hold with a specified duration period to hold items. The duration is calculated from the date a mailbox item is received or created. If a duration is not set, items are held indefinitely or until the hold is removed.
- **In-Place Hold** - Provides a more granular hold capability. The hold can be based on query parameters with the ability to place multiple holds on one mailbox.

### Example Scenarios:

If a mailbox is placed on one or more In-Place Hold AND on Litigation Hold (without a duration period) at the same time, all items are held indefinitely or until the holds are removed

If Litigation Hold is removed and the user is still placed on one or more In-Place Hold(s), items matching the In-Place Hold criteria are held for the period specified in the hold settings.

When migrating a mailbox that is on Litigation Hold from one server environment to another (in this case from EM to ID and/or from ID to the Cloud), the Litigation Hold setting continues to apply, ensuring that compliance requirements are met during 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 remotely 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 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.

## EMAIL APPLICATIONS DEPENDENCIES

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.

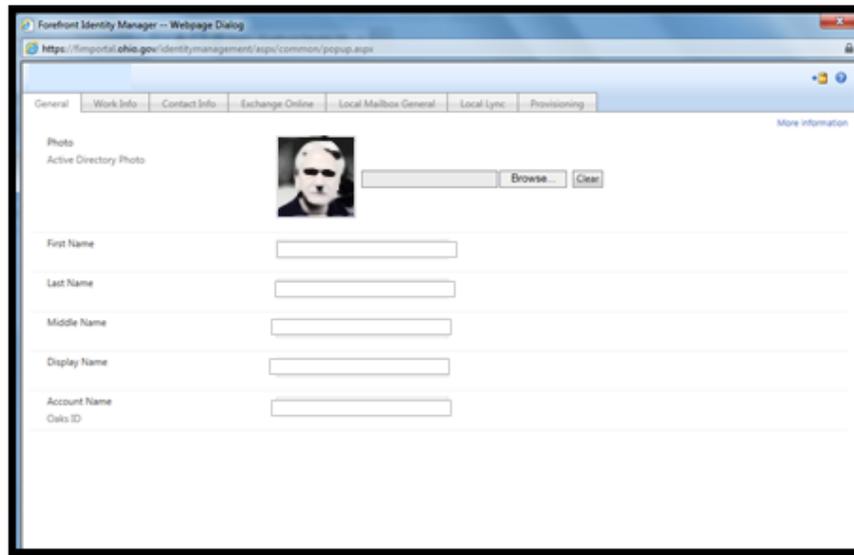
## DISTRIBUTION GROUPS

- **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.

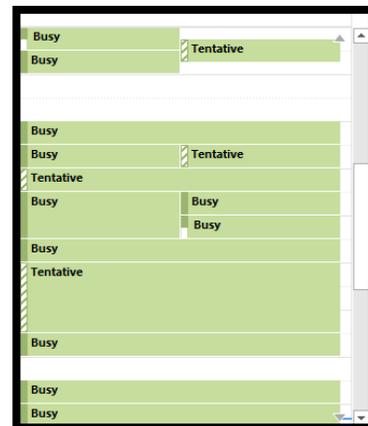
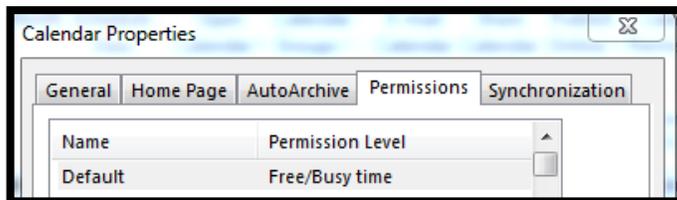
## DISPLAY NAMES

Once an account migrates to ID or O365, the user account information is directly tied to the OAKS payroll system thereby pulling those attributes into the email system. What does this mean to the user? If a user's given name is different than what the current email address displays then there will be a Display Name change required. Display Names can be changed in the FIM tool and this task can be performed by the agency's IT Staff.



## FREE/BUSY

After an account migrates to O365 there will be some calendar viewing changes. In O365, the default calendar permission is set to Free/Busy for all accounts.

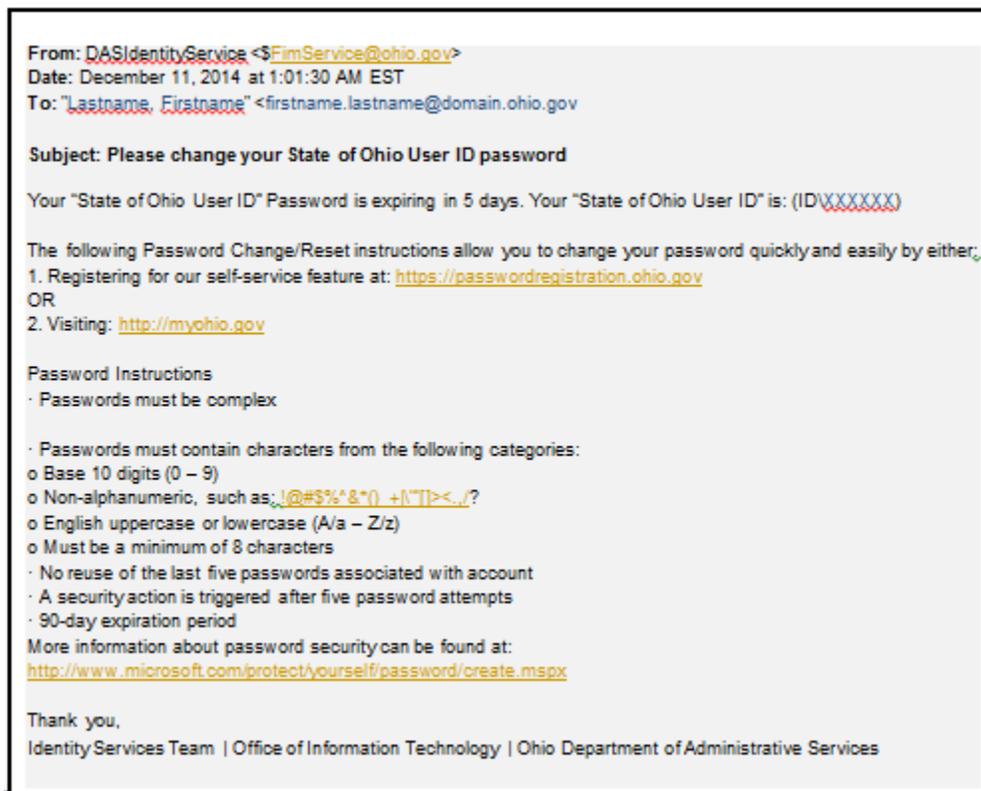


If you previously had granted specific calendar viewing permissions to other users, those same permissions should apply; however, accounts that still reside in the on-premises solution may not be able to access the data and vice versa.

## PASSWORD EXPIRATION EMAILS

If you receive a message titled: “Please change your State of Ohio User ID password” that looks like the displayed message, it is a legitimate message and is a new feature within our Identity Management and Cloud systems. These messages are auto-generated when passwords are within 14, 7, 5, 3 and 1 day(s) of expiration. When you receive these messages, it is highly recommend that you change your password as soon as possible. If your password does expire, you will be locked out of your email. Please also be aware that when you change it, you may need to log out of your email client so that it will prompt you for your new password.

If you have a state-owned iPhone, you will also need to change your email password under **Settings→Mail, Contacts, and Calendars→Exchange ActiveSync.**



# LOGON CREDENTIAL CHANGES FOR EM DOMAIN USERS

For Agencies that are currently in the EM Domain, it is important to start communicating logon credential changes that will go into effect once accounts are migrated to OFFICE 365

Below is an example of a potential communication:

- Know your State of Ohio User ID (SOUID)

**Note: SOUID = State of Ohio User ID = MYOHIO.GOV ID**

- Be sure your State of Ohio User ID password is current. If you have received notice that your password needs to be reset, make and test the change **before** migration.

ID	SOUID@id.ohio.gov
Password	SOUID password
Example	10010100@id.ohio.gov

## 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.

## ESTABLISHING PRIMARY EMAIL ADDRESS

- 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.

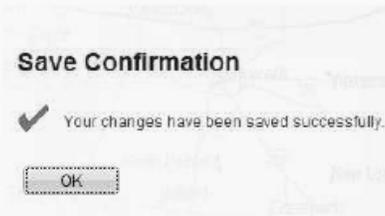
- Step 2** Move your cursor over the **My Info** tab in the top toolbar after logging in.  
Select **Setup Forgotten Password Question** from the drop-down list.



- 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.

The screenshot shows the 'Change Password' form. It includes the following fields and information:
 

- User ID: 10064708
- Description: CLARE A RUBADUE
- \*Current Password: [text input field]
- \*New Password: [text input field]
- \*Confirm Password: [text input field]
- A 'Change Password' button at the bottom.

**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.

The screenshot shows a confirmation message: 'Password Saved' with a checkmark icon and the text 'Your password has successfully been changed.' Below the message is an 'OK' button.

# MIGRATING FROM EM TO IDENTITY USER EXPERIENCE

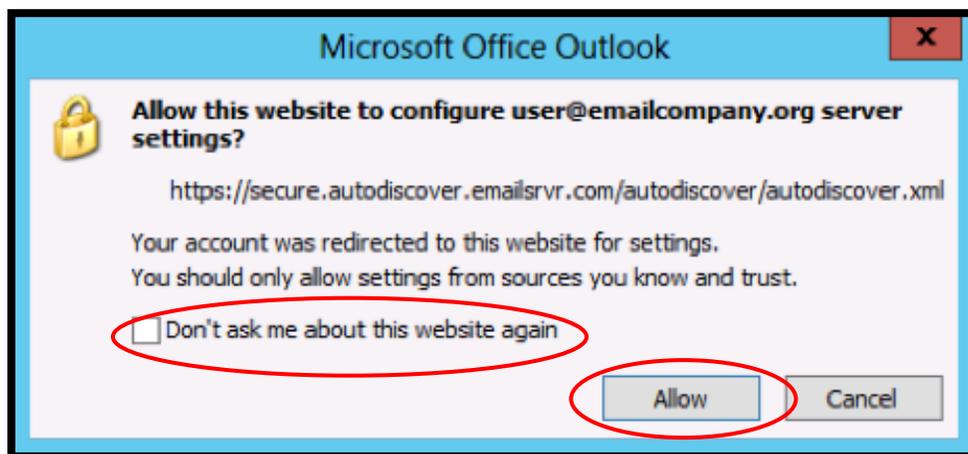
On the first day of your agency's EM to ID migration mailbox users will likely experience the following popups and will need to follow these steps in order to have minimal impact and successfully log into their accounts.

On Day 1 of your migration:

- Log into your outlook client with your pre-migration credentials  
([firstname.lastname@agencyname.ohio.gov](mailto:firstname.lastname@agencyname.ohio.gov), or ODNNT\firstname.lastname)

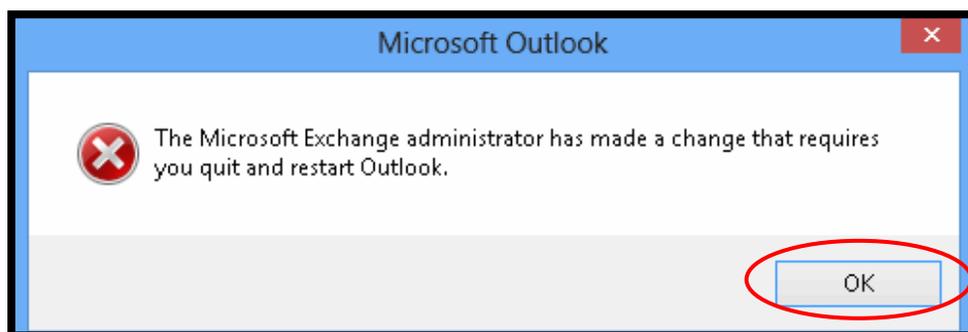
Once logged in you will see a similar pop-up:

- Ensure that you select "**Don't ask me about this website again**" and select Allow



Next you will see the following pop up.

- Select **OK**



To close out of Outlook;

- Select **File**
- Select **Exit**
- Re-open Outlook

You should see a Windows Credential Dialog Box pop up.

- Enter your new Outlook credentials: [SQUID@id.ohio.gov](mailto:SQUID@id.ohio.gov) along with your myohio.gov password.



**Note:** You can check the “Remember my credentials” box in order for Outlook to store your password.

Once you enter your credentials;

- Verify that you are connected by looking in your status bar.

You may see either of the following statuses:



If for any reason your account will not authenticate, follow these troubleshooting steps prior to contacting your agency’s helpdesk.

- Verify that your password is correct by logging into the [myohio.gov](https://myohio.gov) website
- Log into the Outlook Web App (OWA) at <https://mail.ohio.gov> and verify that you can access your mail from the server
- If an OWA error occurs, such as “no user found,” try to log onto the old Outlook Web App page at [mail.em.ohio.gov](https://mail.em.ohio.gov) using your old credentials:  
[firstname.lastname@agencyname.ohio.gov](mailto:firstname.lastname@agencyname.ohio.gov)  
OR  
[firstname.lastname@agencyname.state.oh.us](mailto:firstname.lastname@agencyname.state.oh.us)

This will test whether your account successfully migrated

- Contact your agency’s help desk for further assistance

## ADVANCED TROUBLESHOOTING FOR AGENCY HELP DESK

### Mailbox Repair

- Close Outlook completely by going to **File > Exit**
- Open the Control Panel
- Select the **Mail (or Mail32bit)** icon
- Click on **Email Accounts**
- Select the email account with the user’s primary SMTP address
- Click the **Repair** button

The repair will find the account using Auto-Discover and then prompt you for credentials.

If the account is not found;

- Proceed to **New Profile Setup** below
- Enter the [SQUID@id.ohio.gov](mailto:SQUID@id.ohio.gov) credentials (using the user’s actual SQUID)
- Click **Next**
- Click **Finish**
- Enter the credentials once again ([SQUID@id.ohio.gov](mailto:SQUID@id.ohio.gov))

### New Profile Setup

- Close Outlook completely by going to **File > Exit**
- Open the Control Panel

- Select the **Mail (or Mail32bit)** icon
- Click on **Show Profiles**
- Remove any previous profiles if necessary
- Click **Add**
- Create a profile name. A name such as “Outlook365”
- Enter the user’s email address and Account name (Lastname, Firstname)
- Click **Next**

The account will be found using AutoDiscover

- Once found it will prompt you for credentials.
- Enter your [SQUID@id.ohio.gov](mailto:SQUID@id.ohio.gov)
- Click **Next**
- Click **Finished**

If these steps are not successful, please contact your lead migration engineer.

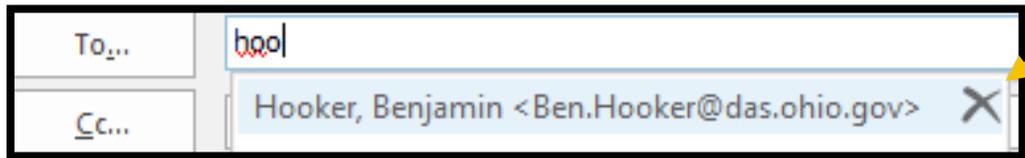
## OUTLOOK AUTO-COMPLETE CACHING

After a mailbox migration it is possible that a user will receive non-deliverable mail item messages after attempting to send or to respond to an email address that has been cached. This can be fixed one at a time or it can be fixed by completely emptying the Auto-Complete Cache.

### Removing One Cached Address at a Time:

From a new mail message;

- Key the recipient's name in the **To** field
- Allow the Auto-Complete list to pop up



From there, press the down arrow key and then **DELETE** or click the **X** to the right of the name that you want to remove.

This step will allow you to remove a single item that is no longer needed or is not properly working.

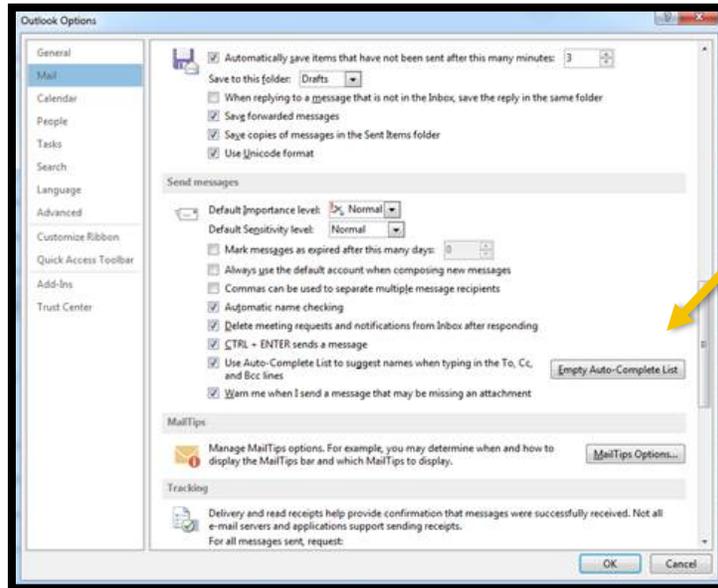
### Emptying the Entire Auto-Complete Cache:

From your Outlook mailbox;

- Select **File**
- Select **Options**

In the Options Dialog box;

- Navigate to the Mail setting on the left-hand side
- Scroll down to the **Send Messages** section
- Click the **Empty Auto-Complete List** button



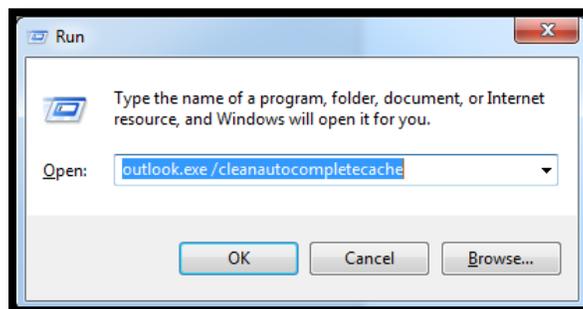
Once this step is complete you will need to select names from the address book or type the whole email address to address a message. It will then begin to re-populate the list.

**Note:** if you choose to empty the entire Auto-Complete List, it will clear ALL of the items in your cache. If you do not have commonly used external addresses saved as contacts, these addresses will be deleted.

An alternate way to empty the cache is to start Outlook at the command line:

**Start > Run > type `outlook.exe /cleanautocompletecache` and click **Enter**.**

On Outlook startup, it will be loaded without cached entries. (Be sure that there is a space between the .exe and the /)



# EMPLOYEE ONBOARDING, OFFBOARDING AND TRANSFERS

Technical procedures for Agency onboarding, offboarding and transfers are discussed in depth in the **FIM Portal Training** seminar and refresher course.

The following memos and flowchart are included to provide basic information and guidance for email when employees are transferring between Agencies.

# EMPLOYEE INTER-AGENCY TRANSFER

Ohio Department of Administrative Services

John R. Kasich, Governor

## Memorandum



To: All Human Resources Administrators, Payroll Personnel, CIOs and IT Staff of Agencies, Boards and Commissions

From: Kevin Milstead, Assistant Deputy Director, DAS Human Resources Division  
Spencer Wood, Chief Operating Officer, DAS Infrastructure Services Division

Date: August 13, 2014

Re: Employee Inter-agency Transfer Guidance

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The purpose of this memorandum is to provide guidance on how to efficiently transfer employees between agencies.

When OAKS HCM went live in December 2006, agencies were instructed to transfer employees after the final payroll had been completed by the releasing agency. Following this process, the receiving agency does not have access to the employee's job data record until the transfer has been completed.

### **New HCM process for transfers**

In order for transferring employees to have access (e.g., network, email account, OAKS HCM, OAKS FIN, etc.) on their first day at their new agency, DAS HRD is recommending agencies coordinate the completion of the employee transfer in OAKS HCM no later than the employee's last date worked at the releasing agency. As the Office of Information Technology (OIT) continues to expand the use of HCM data, this revised process will provide expanded services to employees in a quicker and more efficient manner.

### **New e-mail setup process for transfers**

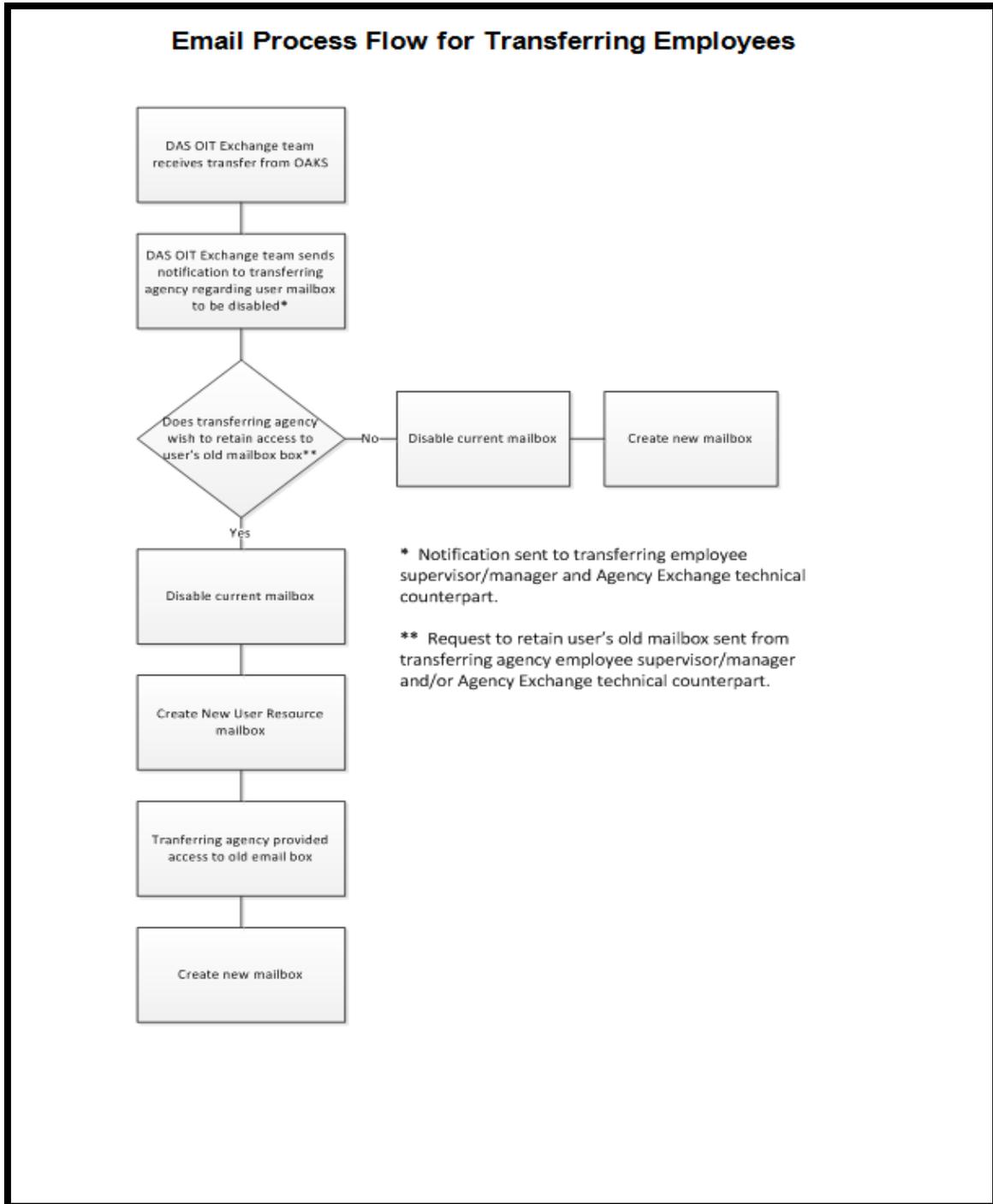
The transfer of employee email accounts is one of the IT services that is dependent on accurate HCM data. Attached is a workflow that depicts the new e-mail process for agencies when an employee transfers to a different agency. This process will be communicated to relevant IT personnel to ensure a 48-hour turn around for the creation of new email account.

Should you need assistance in processing the final payroll for an employee who has transferred from your agency, please contact your DAS HRD Payroll Support Specialist. Your Payroll Support Specialist will be able to approve or modify time based on your written request and can provide any documents (e.g., screenshots of paychecks, timesheets, etc.) you will need for your agency's records.

If you have any questions or concerns regarding this revised process, please contact Kevin Milstead at 614.466.0767.

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# EMAIL PROCESS FLOW FOR TRANSFERRING EMPLOYEES



# EMPLOYEE INTER-AGENCY TRANSFER GUIDE FOLLOW-UP

Ohio Department of Administrative Services

John R. Kasich, Governor

## Memorandum



To: CIOs and IT Staff of Agencies, Boards and Commissions

From: Spencer Wood, Chief Operating Officer

Date: August 14, 2014

Subject: Employee Transfer Process and E-Mail

### Employee Transfer Process

On August 14, 2014, the Human Resources Division and the Office of Information Technology sent a message explaining the newly streamlined Employee Transfer process. The new process ensures that transferring agencies retain the mailbox of the transferring/separating employee and also ensures a 48-hour email creation turnaround time for the employee's new agency. This new e-mail process includes:

- Disabling an employee's old email account at the former agency.
- Transferring of the OAKS employee ID to the new agency.
- Creating an email account at the new agency.

Currently, an email transfer request must be submitted to the DAS Exchange team to disable and/or enable an account; however, future plans include automating the process so employees will have email as soon as they transfer to the new agency.

To ensure that the process flows smoothly, the following information will be sent to the transferring employee's agency Exchange technical contact and employee's supervisor and/or manager prior to the employee's departure. A response to [csc@ohio.gov](mailto:csc@ohio.gov) to access the old mailbox, after the employee departs, will be required.

On Insert Date, Employee name is transferring to insert new agency name. DAS/OIT Exchange team is scheduled to disable the employee's current mailbox on insert date at insert time.

If there is a need to access the employee's old mailbox, contact the DAS/OIT Customer Service Center (CSC) at [csc@ohio.gov](mailto:csc@ohio.gov) or 614.644-6860 or 877.644.6860. The DAS Exchange team will assist the transferring agency in accessing the old mailbox, per the request.

# SLA FOR INCIDENT AND PROBLEM MANAGEMENT



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## SLA for Incident and Problem Management

Priority	Characteristics	Service Resolution Target
<b>1 Severe Business Impact</b>	<ul style="list-style-type: none"> <li>➤ Critical system, network or key application outage (or imminent outage) with critical impact on service delivery</li> <li>➤ Total loss of production service to entire State</li> <li>➤ Impacts one or more service level commitments</li> <li>➤ Revenue or delivery schedule impact</li> <li>➤ Hourly communication updates</li> </ul>	<b>4 Hours</b>
<b>2 Major Business Impact</b>	<ul style="list-style-type: none"> <li>➤ Key component, application, critical State machine or network is down, degraded or unusable</li> <li>➤ Potential critical impact on service delivery</li> <li>➤ Service performance degradation; service delivery impacted</li> <li>➤ Partial State set affected</li> <li>➤ Twice a day (morning and afternoon) communication or when there is a change in status</li> </ul>	<b>24 Hours</b>
<b>3 Minor Business Impact</b>	<ul style="list-style-type: none"> <li>➤ A component, minor application or procedure is down, unusable or difficult to use</li> <li>➤ Some operational impact, but no immediate impact on service delivery</li> <li>➤ Service outage but alternative workaround available</li> <li>➤ Incidents that degrade service but do not prevent delivery of service</li> <li>➤ Potential exposure to ability to deliver service or scattered State users affected</li> <li>➤ Daily communication with the customer</li> </ul>	<b>3 Days</b>
<b>4 Minimal or No Business Impact</b>	<ul style="list-style-type: none"> <li>➤ A component or procedure, not critical to the State, is unusable</li> <li>➤ Alternative is available; deferred maintenance is acceptable</li> <li>➤ No impact to service</li> <li>➤ No production affected</li> <li>➤ Individual State user affected</li> <li>➤ Communication with customer every other day</li> </ul>	<b>7 Days</b>

**Note:** Incident response time to communicate with the customer is 15 minutes.

**Customer Service Center**  
**CSC@ohio.gov**  
**(614) 644-6860 or (877) 644-6860**

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Service, Support, Solutions for Ohio Government  
 Office of the State COO | 1320 Arthur E. Adams Dr. | Columbus, Ohio 43221  
 Phone 614.644.9245 | Cell 614.534.8734 | Spencer.Wood@dai.ohio.gov

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 Robert Elair, Director  
 Stuart R. Davis, Assistant Director/  
 State Chief Information Officer

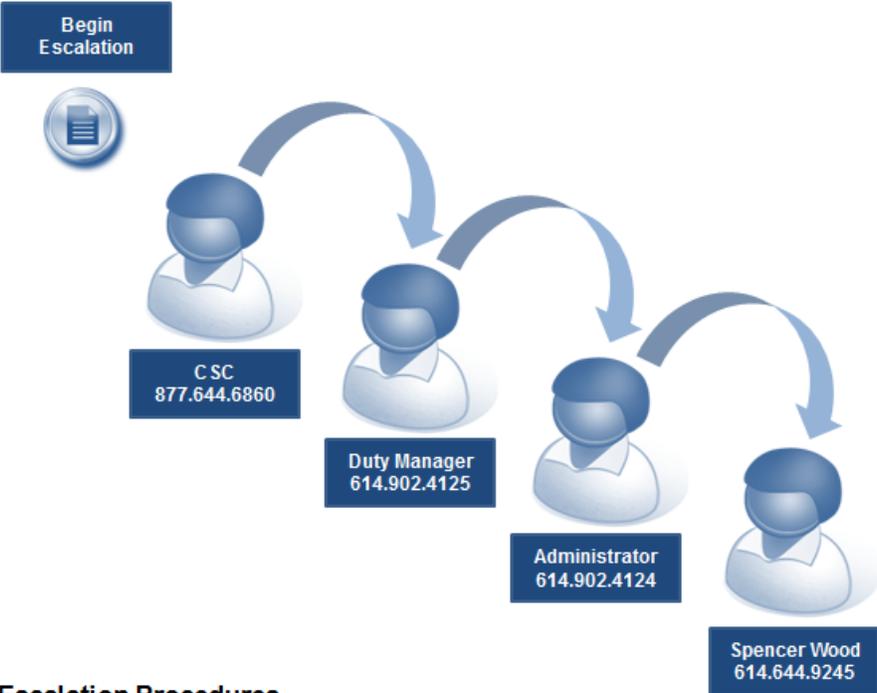
# ESCALATION PROCEDURES



Office of Information Technology  
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**Begin Escalation**



```

      graph LR
      Start((Begin Escalation)) --> CSC[CSC  
877.644.6860]
      CSC --> DM[Duty Manager  
614.902.4125]
      DM --> Admin[Administrator  
614.902.4124]
      Admin --> SW[Spencer Wood  
614.644.9245]
      
```

**Escalation Procedures**

Timeframe	Customer	OIT
Within 15 minutes of receipt of Incident notification	Report an Incident to the OIT CSC via email or phone call	<ul style="list-style-type: none"> <li>&gt; Create Incident ticket</li> <li>&gt; Identify Incident Priority</li> <li>&gt; Route Incident ticket to service owner(s)</li> <li>&gt; Notify Customer of Incident ticket and reference number</li> </ul>
Prior to the resolution SLA breach the Incident Ticket will be automatically escalated to the service manager	The customer will receive an update communication from the OIT CSC	<ul style="list-style-type: none"> <li>&gt; The OIT service manager will be notified that the SLA is about to be breached. Incident ticket updates are required or escalation will continue</li> <li>&gt; The OIT CSC will provide the customer an update of resolution activities</li> </ul>
After the resolution SLA breach, the Incident Ticket will be automatically escalated to OIT leadership	The customer will receive an update communication from the OIT CSC	<ul style="list-style-type: none"> <li>&gt; The OIT CSC escalates the Incident to OIT leadership advising that the SLA has been breached</li> <li>&gt; The OIT CSC will provide the customer an update of the resolution activities</li> </ul>

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 Office of the State COO | 1320 Arthur E. Adams Dr. | Columbus, Ohio 43221  
 Phone 614.644.9245 | Cell 614.554.8734 | Spencer.Wood@das.ohio.gov

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 Robert Blair, Director  
 Stuart R. Davis, Assistant Director/  
 State Chief Information Officer

# PILOT ACTIVITIES AGENCY - POC EMAIL COMMUNICATION

In the days before your pilot of Outlook 365, please create and supply OIT with your list of pilot users including name, email address, and SOUID

- Communicate to your pilot group regarding their user experience:
- You will have a new way to log into your email account
- Confirm Checklist items completion

## OFFICE 365 Agency Engagement Pilot Recommendations, Requirements, Activities, User Acceptance Tests Expectations and Potential Agency Testers

### 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: \_\_\_\_\_

## USER ACCEPTANCE TESTING:

We have provided a set of scripts for your Agency to exercise the various functionality of the Office 365 email in the Cloud.

These scripts were created by Microsoft and not intended to exercise every piece of functionality but to use the product as most people use it daily.

Our suggestion is to have an active email user (i.e. administrative assistant) go through each step of the script. We have uncovered some issues with the product during the testing.

**Note:** It is a required migration task for Agencies to step through each script.

**Offline address book**

<b>Test case number</b>	4.1.1
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	From the online mailbox, download and access to offline address book. Select the Send and Receive tab Select the down arrow for the Send/Receive Groups Select Download Address Book from the menu Leave the default settings and click OK
<b>Method</b>	
<b>Expected results</b>	Able to download and view content of offline address book.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Folder Search**

<b>Test case number</b>	4.1.2
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	From the online mailbox, setup a search folder to filter emails.
<b>Method</b>	
<b>Expected results</b>	Search result returned after successful search.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Send/Receive**

<b>Test case number</b>	<b>4.1.3</b>
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	From an online mailbox (mailbox that has been migrated to the cloud), send an email to an on-premises (mailbox on OIT servers) recipient and another online recipient.
<b>Method</b>	
<b>Expected results</b>	Successful email deliveries.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Reply**

<b>Test case number</b>	<b>4.1.4</b>
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	From an online mailbox, reply an email to an on-premises recipient and to another online recipient.
<b>Method</b>	
<b>Expected results</b>	Successful delivery of reply.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Forward**

<b>Test case number</b>	4.1.5
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	From an online mailbox, forward an email to an on-premises recipient and an online recipient.
<b>Method</b>	
<b>Expected results</b>	Successful forward of email.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Distribution List**

<b>Test case number</b>	4.1.6
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	From an online mailbox, send an email to a distribution list.
<b>Method</b>	
<b>Expected results</b>	Successful delivery of email to distribution list.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Attachment Size**

<b>Test case number</b>	<b>4.1.7</b>
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	From an online mailbox, send an email with an attachment that is over the size limit.
<b>Method</b>	
<b>Expected results</b>	Failed delivery of the email with the oversize attachment.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	
<b>Comments or information</b>	

**Address Book: recipient properties**

<b>Test case number</b>	<b>4.1.8</b>
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	From an online mailbox, open the address book and view the properties of a recipient in the address book.
<b>Method</b>	
<b>Expected results</b>	Successfully retrieve the properties of the recipient in the address book.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Folders**

<b>Test case number</b>	<b>4.1.9</b>
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	Online mailbox creates a new folder, rename the folder and move the folder.
<b>Method</b>	
<b>Expected results</b>	Successful folder operations.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Move/Copy Mail Items**

<b>Test case number</b>	<b>4.1.10</b>
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	Online mailbox, copy mail items and move mail items.
<b>Method</b>	
<b>Expected results</b>	Successful move and copy of email items to different folders.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Deleted Items**

<b>Test case number</b>	<b>4.1.11</b>
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	Online mailbox, delete mail and empty deleted Items folder. From the Outlook Folder tab, select Recover Deleted Items in the Clean-up area Select the items that you want to recover, then click the Recover Selected Items button
<b>Method</b>	
<b>Expected results</b>	Successful deletion of email and a clean deleted items folder.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Deleted item recovery**

<b>Test case number</b>	<b>4.1.12</b>
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	Online mailbox, execute "Recover Deleted Items" functionality.
<b>Method</b>	
<b>Expected results</b>	Deleted items listed in the "Deleted Items" folder. Able to recover any of the deleted items.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Out-of-office notifications**

<b>Test case number</b>	<b>4.1.13</b>
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	Online mailbox, setup an out-of-office (OOF) notification. Ensure that OOF notifications are sent.
<b>Method</b>	
<b>Expected results</b>	Only internal users will get an OOF message from the test user.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Email disclaimers**

<b>Test case number</b>	<b>4.1.14</b>
<b>Resource name</b>	To be completed by Agencies that uses an email account with a disclaimer.
<b>Date</b>	
<b>User scenario</b>	Send an email from an online mailbox to an Internet recipient; ensure that the email is tagged with the correct Ohio disclaimer.
<b>Method</b>	
<b>Expected results</b>	The email sent must be attached in line with the correct disclaimer.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Scheduling assistant: free/busy online mailbox to on-premises**

<b>Test case number</b>	4.2.1
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	Use scheduling assistant to view free/busy from an online mailbox to an on-premises mailbox.
<b>Method</b>	
<b>Expected results</b>	Ensure results are confirmed about user's availability in their schedules.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Scheduling assistant: free/busy on-premises to online mailbox**

<b>Test case number</b>	4.2.2
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	Use scheduling assistant to view free/busy from an on-premises mailbox (mailbox to OIT servers) to an online mailbox (mailbox that has been migrated to the cloud).
<b>Method</b>	
<b>Expected results</b>	Ensure results are confirmed about user's availability in their schedules.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Send meeting request**

<b>Test case number</b>	4.2.3
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	From on-premises mailbox, send meeting request to online mailbox.
<b>Method</b>	
<b>Expected results</b>	Successful meeting request delivered to online mailbox.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Accept meeting request send**

<b>Test case number</b>	4.2.4
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	From the online mailbox, accept the meeting request.
<b>Method</b>	
<b>Expected results</b>	Successful return of meeting acceptance.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Decline meeting request**

<b>Test case number</b>	4.2.5
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	From the online mailbox, send a meeting request to an on-premises mailbox. At the on-premises mailbox, decline the meeting request.
<b>Method</b>	
<b>Expected results</b>	Successful return of declined meeting request.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Request to distribution list**

<b>Test case number</b>	4.2.6
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	Online mailbox, send a meeting request to a distribution list.
<b>Method</b>	
<b>Expected results</b>	Successful delivery of meeting request to distribution list.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Recurring meeting request**

<b>Test case number</b>	4.2.7
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	From the online mailbox, send a recurring meeting request to an on-premises mailbox.
<b>Method</b>	
<b>Expected results</b>	Successful creation of weekly recurring meeting.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Send and read email**

<b>Test case number</b>	4.3.1
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	From an online mailbox, send an email using Outlook Web App.
<b>Method</b>	
<b>Expected results</b>	Successful delivery and viewing of email.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Preview pane**

<b>Test case number</b>	4.3.2
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	On the online mailbox, read mail using preview pane via Outlook Web App.
<b>Method</b>	
<b>Expected results</b>	View email in preview pane.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Free/busy and meeting request**

<b>Test case number</b>	4.3.3
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	View free/busy and send a meeting request from an online mailbox to an on-premises mailbox via Outlook Web App Outlook.
<b>Method</b>	
<b>Expected results</b>	Successful delivery of a meeting request.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Attachments**

<b>Test case number</b>	<b>4.3.4</b>
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	Send email with an attachment from an online mailbox using Outlook Web App.
<b>Method</b>	
<b>Expected results</b>	Successful delivery of email with attachment to recipient.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Move messages**

<b>Test case number</b>	<b>4.3.5</b>
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	On the online mailbox, move messages between folders via Outlook Web App.
<b>Method</b>	
<b>Expected results</b>	Messages moved to folder.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Scheduling assistant**

<b>Test case number</b>	<b>4.3.6</b>
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	On the online mailbox, create an appointment on the calendar by using the scheduling assistant in Outlook Web App (OWA).
<b>Method</b>	
<b>Expected results</b>	Successful view availability via the OWA calendar.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Spell checker**

<b>Test case number</b>	<b>4.3.7</b>
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	Use spell checker in Outlook Web App in an online mailbox.  Outlook Web App relies on your web browser for checking spelling. Right-click the word you want to check and select the correct spelling from the side menu.
<b>Method</b>	
<b>Expected results</b>	Find incorrect word and be able to correct the spelling.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Exchange control panel**

<b>Test case number</b>	4.3.8
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	Configure options in the mailbox using Outlook Web App (OWA).
<b>Method</b>	<p>Open mailbox Office 365 exchange online using OWA.</p> <p>On the top right hand side of your screen, click on the drop down menu next to options.</p> <p>Select “see all options.” Once options page opens, notice the change in address bar should change to “ecp” instead of “owa.”</p> <p>Click on organize emails on the left hand side and click on delivery reports in the middle pane.</p> <p>Try to search for a message you have sent to some other user who is on Office 365.</p>
<b>Expected results</b>	You should be able to see the delivery report of the message with details; with this working you can consider ecp as working component.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Access shared calendar**

<b>Test case number</b>	4.4.1
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	Check delegated user is able to access the shared calendar.
<b>Method</b>	<p>Move the mailboxes one. Where delegation is assigned two. Who has been assigned delegation?</p> <p>Log-in to Outlook with user who has been assigned delegation.</p> <p>Access other user's calendar.</p> <p>Try to perform operation as of the level of delegation example create calendar item or send meeting request on behalf of the user.</p>
<b>Expected results</b>	User should be able to access other user's calendar and create or delete meeting request.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Send on Behalf**

<b>Test case number</b>	4.4.2
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	Send email on behalf of another user.
<b>Method</b>	<p>Move the mailboxes one. Where delegation is assigned two. Who has been assigned delegation on inbox?</p> <p>Log-in to Outlook with user who has been assigned delegation.</p> <p>Open other user's mailbox folder (inbox).</p> <p>Create a new mail item and from option choose show from field.</p> <p>In from field, type the user name of the mailbox where delegation is assigned.</p> <p>Sent to other mailbox or the mailbox who has been assigned delegation.</p> <p>Check the email and it should appear as "Send On Behalf of &lt;user&gt;"</p>
<b>Expected results</b>	User should be able to send mail on behalf of other user where delegation is configured and mail should appear as "Send on behalf."
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Send As**

<b>Test case number</b>	4.4.3
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	Send email with 'Send As' another user.
<b>Method</b>	<p>Move the mailboxes one. Where Send As permissions are given two. Who has been assigned Send As permissions?</p> <p>Log-in to Outlook with user who has been assigned Send As permissions.</p> <p>Create a new mail item and from option choose show From field.</p> <p>In From field type the user name of the mailbox where Send As is assigned.</p> <p>Sent to other mailbox or the mailbox who has been assigned delegation.</p> <p>Check the email and it should appear as if it is sent from user where Send As permissions where configured.</p>
<b>Expected results</b>	User should be able to send mail on behalf of other user where Send As is configured and mail should appear as if the mail was sent by mailbox where Send As permissions were configured.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Full secondary mailbox access**

<b>Test case number</b>	4.4.4
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	Opening and accessing a secondary online mailbox with full access rights.
<b>Method</b>	<p>Move the mailboxes one. Where full mailbox access permissions are given two.</p> <p>Who has been assigned Full Mailbox Access permissions?</p> <p>Configure profile to open other user's mailbox.</p> <p>Option is available in Profile→More Settings→Advance.</p> <p>Log-in to Outlook with user who has been assigned full mailbox access permissions.</p>
<b>Expected results</b>	Two mailboxes should be opened in same outlook profile without retying any credentials.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Rules**

<b>Test case number</b>	4.4.5
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	Create and use inbox rules in an online mailbox.
<b>Method</b>	<p>Create some server side rules inside the mailbox.</p> <p>Open the mailbox from Office 365 Exchange online.</p> <p>Test rules are working.</p> <p>Server-side rules are handled entirely by the Exchange Server, independent of the state of the Outlook client. For example, forward email (sent from user on the Exchange server) to another mailbox (recipient mailbox must also reside on the Exchange server).</p> <p>Client-only rules do not execute until the user who created the rule, logs into the Outlook client with the same profile used to create the rule. For example, mark all emails with certain text in the subject line as urgent.</p>
<b>Expected results</b>	All the rules should be working successfully and should work as expected.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Configuring a new device**

<b>Test case number</b>	5.1.1
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	Configure a Windows Phone to synchronize with a new mailbox in Office 365 via the cloud's AutoDiscover service.
<b>Method</b>	
<b>Expected results</b>	The mobile device should configure itself through the AutoDiscover settings and successfully synchronize with the online mailbox.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Re-configuring ActiveSync post-migration**

<b>Test case number</b>	5.1.2
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	Re-configure a configured Windows Phone to synchronize with the migrated mailbox in Office 365 via the cloud's AutoDiscover service.
<b>Method</b>	
<b>Expected results</b>	The mobile device should configure itself through the AutoDiscover settings and successfully synchronize with the online mailbox.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Receive mail and attachment on mobile device**

<b>Test case number</b>	5.1.3
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	Send email from an online mailbox to the Windows Phone user's mailbox with attachment. View mail and attachment on the mobile device.
<b>Method</b>	
<b>Expected results</b>	Successful delivery of email to the mobile device and be able to view both email and attachment on the mobile device.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Send mail from mobile device**

<b>Test case number</b>	5.1.4
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	Send email from the mobile device to both an internal user and an external user.
<b>Method</b>	
<b>Expected results</b>	Successful delivery of email to both the internal and external user.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Accept a meeting request**

<b>Test case number</b>	5.1.5
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	Send a meeting request from an online user to a mobile device user, accept the meeting request. Check the meeting is booked in the calendar of the mobile device.
<b>Method</b>	
<b>Expected results</b>	Accept the meeting request from the mobile device and see the meeting is booked in the Exchange calendar.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Propose new time on meeting request**

<b>Test case number</b>	5.1.6
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	Send a meeting request to a mobile device user; from the mobile device propose a new meeting timing.
<b>Method</b>	
<b>Expected results</b>	Successful receipt of the proposed new meeting timing by the meeting organizer.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Decline meeting request**

<b>Test case number</b>	5.1.7
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	Send a meeting request to a mobile device user; from the mobile device decline the meeting request.
<b>Method</b>	
<b>Expected results</b>	Successful receipt of the declined meeting notification by the meeting organizer.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Calendar sync**

<b>Test case number</b>	5.1.8
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	On the mobile device user's calendar, mark an appointment in the default calendar using Outlook or Outlook Web App.
<b>Method</b>	
<b>Expected results</b>	Calendar appointment successfully synced to the mobile device.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Contact sync**

<b>Test case number</b>	<b>5.1.9</b>
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	On the mobile device user's contact folder, create a new contact using either Outlook or Outlook Web App.
<b>Method</b>	
<b>Expected results</b>	New contact successfully synced to the mobile device.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Microsoft Exchange Global Address List**

<b>Test case number</b>	<b>5.1.10</b>
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	On the mobile device, perform a lookup for a user entry in the Microsoft Exchange Global Address List and send an email to the entry.
<b>Method</b>	
<b>Expected results</b>	Perform the user search successfully.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Configuring a new device**

<b>Test case number</b>	5.2.1
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	Configure an iPhone/iPad device to synchronize with a new mailbox in Office 365 via the cloud's ActiveSync service.
<b>Method</b>	
<b>Expected results</b>	The mobile device should successfully synchronize with the online mailbox after the configuration.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Re-configuring ActiveSync post-migration**

<b>Test case number</b>	5.2.2
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	Re-configure a configured iPhone/iPad to synchronize with the migrated mailbox in Office 365 via the cloud's ActiveSync service.
<b>Method</b>	
<b>Expected results</b>	The mobile device should successfully synchronize with the online mailbox.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Receive mail and attachment**

<b>Test case number</b>	5.2.3
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	Send email from an online mailbox to the iPhone/iPad user's mailbox with attachment. View mail and attachment on the mobile device.
<b>Method</b>	
<b>Expected results</b>	Successful delivery of email to the mobile device and be able to view both email and attachment on the mobile device.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Send mail from iPhone/iPad**

<b>Test case number</b>	5.2.4
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	Send email from the iPhone/iPad to both an internal user and an external user.
<b>Method</b>	
<b>Expected results</b>	Successful delivery of email to both the internal and external user.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Calendar sync**

<b>Test case number</b>	5.2.5
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	On the mobile device user's calendar, mark an appointment in the default calendar using Outlook or Outlook Web App.
<b>Method</b>	
<b>Expected results</b>	Calendar appointment successfully synced to the mobile device.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Contact sync**

<b>Test case number</b>	5.2.6
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	On the mobile device user's contact folder, create a new contact using either Outlook or Outlook Web App.
<b>Method</b>	
<b>Expected results</b>	New contact successfully synced to the mobile device.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Microsoft Exchange Global Address List**

<b>Test case number</b>	5.2.7
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	On the mobile device, perform a lookup for a user entry in the Microsoft Exchange Global Address List and send an email to the entry.
<b>Method</b>	
<b>Expected results</b>	Perform the user search successfully.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Office 365 installation**

<b>Test case number</b>	5.2.1
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	
<b>Method</b>	
<b>Expected results</b>	
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Previous Office Version Uninstall**

<b>Test case number</b>	5.2.2
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	
<b>Method</b>	
<b>Expected results</b>	
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	
<b>Comments or information</b>	

**Activation and Deactivation for Multiple People on a Workstation**

<b>Test case number</b>	5.2.2
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	
<b>Method</b>	
<b>Expected results</b>	
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	
<b>Comments or information</b>	

**User Does Not Connect for Over 30 Days**

<b>Test case number</b>	5.2.2
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	
<b>Method</b>	
<b>Expected results</b>	
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	
<b>Comments or information</b>	

**Password is one week from expiration**

<b>Test case number</b>	5.2.1
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	Can notification be sent other than the pop up window in the task bar?
<b>Method</b>	
<b>Expected results</b>	
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Password is one day from expiration**

<b>Test case number</b>	5.2.2
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	Can notification be sent other than the pop up window in the task bar?
<b>Method</b>	
<b>Expected results</b>	
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	
<b>Comments or information</b>	

**IT Support resets Password with the FIM Password Reset Utility**

<b>Test case number</b>	5.2.2
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	User contacts IT support for a password reset. IT support resets the password with FIM Password Reset Utility. Passwords have an 8 character minimum and are case sensitive. It must be 8 characters or longer and include at least one letter, one number and one special character (i.e. [!,@,#,\$,%^,&,*,(,)]); Not be one of your previously used passwords.
<b>Method</b>	
<b>Expected results</b>	Error message is displayed in the Reset Tool if requirements not met in password. User must be able to use the new password in the client in XX amount of time and in OWA in XX amount of time.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	
<b>Comments or information</b>	

**User resets Password with OAKS tool**

<b>Test case number</b>	5.2.2
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	User uses the OAKS password reset tool.
<b>Method</b>	
<b>Expected results</b>	User must be able to use the new password in the client in XX amount of time and in OWA in XX amount of time.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	
<b>Comments or information</b>	

**Sending a fax to a physical fax machine (ODOT, Commerce, and DPS)**

<b>Test case number</b>	5.2.1
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	Enter a valid fax machine number in the To field with the following format: [fax:nnn-nnn-nnnn]. Complete the email with subject and body text.
<b>Method</b>	
<b>Expected results</b>	Receiving fax device should get the fax.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	

**Sending a fax to an ODOT Esker Fax Number (ODOT Only)**

<b>Test case number</b>	5.2.2
<b>Resource name</b>	
<b>Date</b>	
<b>User scenario</b>	Enter a valid ODOT Esker fax number in the To field with the following format: [fax:nnn-nnn-nnnn]. Complete the email with subject and body text.
<b>Method</b>	
<b>Expected results</b>	Fax delivered to the user's mailbox.
<b>Pass/fail</b>	
<b>Observed results</b>	
<b>Environment</b>	Pre-production
<b>Comments or information</b>	List of ODOT valid fax numbers for testing: 614-887-4020, 614-887-4013

## 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. 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: \_\_\_\_\_

