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Introduction

This Statement of Work (SOW) and any exhibits, appendices, schedules, and attachments to it are made pursuant to the Work Order No 20100447, the terms of which are incorporated herein by reference, by and between "University of Arizona" ("Customer", "you", "your," "U of A") and Microsoft Corporation ("Microsoft", "us", "we", "our") or our affiliate, and sets forth the services to be performed by us related to "Mailbox Migration to Exchange Online." ("project"). This SOW, together with the Work Order, represents the complete baseline for scope, services, Service Deliverables, and acceptance applicable to this project. All changes to this document will be managed in accordance with the Change Management Process defined below. Any terms not otherwise defined herein will assume the meanings set forth in the Work Order.

This SOW and the associated Work Order expire 30 Days after their publication date, unless they have been formally extended in writing by Microsoft Corporation.

Microsoft Corporation is pleased to provide the deployment assistance described within to U of A. The deployment assistance under this Statement of Work is being provided in conjunction with U of A’s Microsoft Online Subscription Agreement.

U of A currently hosts a mixed e-mail messaging environment made up of several disparate architectures including Cyrus, Exchange Server, gmail, and others. U of A has a centralized IMAP mail service on Cyrus containing the bulk of Faculty and Staff messaging accounts. Over a four to nine month timeframe, U of A will migrate up to 21,000 IMAP mailboxes to Hosted Exchange Online, part of the Microsoft’s Business Productivity Online Standard Suite (BPOS).
1 Project Objectives And Scope

1.1 Objectives
This migration project will assist U of A in achieving their objective to move approximately 21,000 internally hosted legacy IMAP mailboxes to Microsoft BPOS with mailboxes hosted on Microsoft Exchange Online in Microsoft hosted data centers. Supporting objectives for the project include:

- Leveraging U of A’s central Active Directory, which they call CATNET, as the authoritative directory for messaging accounts
- Moving clients to Exchange-aware applications, such as web-based Outlook Web Access, Outlook 2003 or higher, Entourage EWS, and ActiveSync to gain additional functionality such as calendar and contact management

1.2 Areas Within Scope
U of A has had an opportunity to review the Microsoft BPOS Standard Service Descriptions. Microsoft is offering a Software plus Services solution with features and options common to other customers. Microsoft does not intend to tailor the implementation for each customer beyond the configuration options specified in the Microsoft BPOS Standard Service Descriptions.

1.2.1 General Project Scope
The following items are within scope for the project:

- Microsoft has a specific prescribed deployment methodology and approach for BPOS implementations. Microsoft will perform the following tasks according to the methodology:
  - Migration of the mailboxes and migration processes
  - Migration includes up to 250MB of server-based data per mailbox – e-mail, calendar, and contacts
  - Tier-3 escalation support
- Microsoft will assign a Deployment Consultant and will work with and advise the Uof A project manager and project team. Key items owned by the Deployment Consultant include:
  - Internal project kickoff meeting
  - Customer kickoff meeting
  - Customer status reporting
  - Coordination of all required Microsoft and Partner resources
  - Technical Point of Contact during deployment
  - Handling of required project escalations
- Microsoft will provide the appropriate resources for the migration. Resources may be assigned on a part time basis and will work both remotely and on site as required.

1.2.2 Software Products / Technologies
The deployment assistance under this Statement of Work is being provided in conjunction with U of A’s Microsoft Online Subscription Agreement.
1.2.3 Mailbox Migration

We will leverage U of A’s central Active Directory as the authoritative directory for messaging accounts to eliminate the need to create new passwords. Microsoft will provide the following e-mail migration services. Email migration is a “push vs. pull” approach in which custom scripts are developed. These scripts will need to be monitored and new passwords, if required, U of A will need to create and provide to the end users, all of which need to occur on the customer network. Microsoft will engage with U of A or designated partner for this effort.

A maximum of 250MB data is migrated per mailbox. It is technically possible to move more but this increases migration time. Migration of more than 250MB per mailbox is considered out of scope.

Microsoft has much experience with migrating mailboxes but there are limitations on what is possible with the technology and standard processes used. Please see the Out of Scope section for a list of limitations and explicitly out of scope items.

<table>
<thead>
<tr>
<th>Data Migration Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task</td>
</tr>
<tr>
<td>Design/development of automated migration scripts for IMAP Data</td>
</tr>
<tr>
<td>Migration of up to 250MB of server-based IMAP data for email messages</td>
</tr>
<tr>
<td>Non-server-based Mailbox Data</td>
</tr>
<tr>
<td>Mailbox Rules (manually recreated by end-user)</td>
</tr>
<tr>
<td>Testing and validating migrated data</td>
</tr>
</tbody>
</table>

Table 1. Data Migration Responsibilities

1.2.4 Training and Knowledge Transfer

Informal knowledge transfer will be provided through the project. Informal knowledge transfer is defined as Customer’s staff working alongside Microsoft staff. As part of the standard migration approach, initially the Microsoft Deployment Consultant will execute key provisioning and migration activities and the U of A staff will shadow the Deployment Consultant. After the initial shadow period, the roles will be reversed with U of A staff executing the key provisioning and migration activities while the Microsoft Deployment Consultant shadows the U of A staff.

1.3 Areas Out of Scope

Any area that is not explicitly listed in section 1.2 as “within scope” is out of scope for this engagement.

Microsoft has much experience with migrating mailboxes but there are limitations on what is possible with the technology and processes used at the quoted price. These limitations include:
• Greater than 250MB data migrated per mailbox. It is technically possible to move more but this increases migration time and any requests for more than 250MB per mailbox will be evaluated and priced separately.
• Non IMAP mailboxes will not migrated.
• User Created Rules and Permissions are not be migrated.
  o Delegate access and other permissions that the end user grants to others on his or her mailbox are not migrated to the new mailbox. These must be recreated manually by the end user.
  o Mailbox rules are not migrated. These must be recreated manually by the end user.
• Non-Mail data and Non-Server based Mail data.
  o Any non-server based data for email messages will not be migrated. Data migration is limited to server based data for email messages. Any data contained in personal folders is not migrated.
  o Data migration does not include address lists, distribution lists, contacts nor any other data type besides email messages.
  o Data migration does not include calendars or task lists.

The areas that are out of scope for this engagement include, but are not limited to, the following:
• Customer specific project management of internal organization dependencies
• Development of detailed project plans
• Migration targeting and scheduling
• Configuration or operation of Non-Microsoft software
• Configuration of hardware and networking
• Base operating system installation for on premise servers (tools server and migration engines, etc.)
• Procurement of any 3rd party tools necessary for migration or global address configuration
• Any software required but not included with MS provided migration tool set
• Tailoring the implementation beyond the configuration options specified in the Microsoft BPOS Standard Service Descriptions.
• Packaging and distribution of client side components such as Outlook client deployment and configuration is not in scope.
• Blackberry service is for Blackberry as a device for mail, contacts calendar, tasks and notes only. We do not provide Blackberry application distribution service.
• End-user and administrator documentation and training
• End-user communication materials
• Help desk documentation and training
• Architecture documentation (network, etc)
• Physical configuration of network and associated monitoring tools.
• Configuration and execution of network monitoring during pilot or production deployment
• Physical Network Design changes
• Active directory design
• Decommissioning and removal of on-premise messaging environment
2 Project Approach and Timeline

Microsoft has a specific prescribed deployment methodology and approach for BPOS-S implementation based on the Microsoft Online Deployment Guide (MODG). MODG outlines guidance for any customer that is migrating a variety of messaging systems to Microsoft Exchange Online. The approach described in this document adopts the approach for migrations from IMAP4 messaging systems to BPOS-S. Additional details may be found in the Exhibit: BPOS Migration Approach.

Microsoft Online Services supports migration of the contents of IMAP4 mailboxes from current customer environments to Microsoft Exchange Online. The key factors of a successful migration are thorough planning and a thorough understanding of the current messaging environment. Migration can be done as quickly or as slowly as needed. Small organizations may be able to migrate to Microsoft BPOS-S overnight or over a weekend. Larger or more complex organizations may prefer to establish e-mail and directory coexistence for a longer period of time and perform a controlled migration in logical stages. Organizations of all sizes are encouraged to complete migration as quickly as possible, and when feasible, to complete migration in one “hop”.

The Microsoft Deployment Consultant will work with the Customer Project Manager to assist with the development of a mutually agreed project plan and schedule for the migration of the 21,000 IMAP mailboxes. The objective of the project plan and schedule will be to complete the migration within 4 months and not to exceed 9 months.

2.1 Project Governance Approach

2.1.1 Communication Plan

The following will be used to provide formal communication during the course of the project:

- The Microsoft Deployment Consultant, working in conjunction with the Customer Project Manager, will compile status reports for distribution to both Customer and Microsoft management
- Status meetings will be held to review the project’s overall status, the acceptance of deliverables, the project schedule, and open issues noted in the status report
- An Executive Steering Committee will conduct monthly meetings and produce status reports pursuant to section 3.3, below

2.1.2 Issue/Risk Management Procedure

The following general procedure will be used to manage active project issues and risks during the project:

- **Identify**: Identify and document project issues (current problems) and risks (potential events that impact the project)
- **Analyze & Prioritize**: Assess the impact and determine the highest priority risks and issues that will be managed actively
- **Plan & Schedule:** Decide how high-priority risks are to be managed and assign responsibility for risk management and issue resolution
- **Track & Report:** Monitor and report the status of risks and issues and communicate issue resolutions
- **Control:** Review the effectiveness of the risk and issue management actions

Active issues and risks will be monitored and reassessed on a weekly basis. Mutually agreed upon issue escalation and risk management processes will be defined at the outset of the project.

2.1.3 Change Management Process

Microsoft is offering a Software plus Services solution with features and options common to other customers. Microsoft does not intend to tailor the implementation for each customer beyond the configuration options specified in the Service Descriptions.

Microsoft will listen to, investigate, and respond to any request for change made by U of A, but does not and cannot guarantee that such requests will be approved.

During the project, either party may request, in writing, additions, deletions, or modifications to the services described in this SOW (“change request”).

For all change requests, regardless of origin, we shall submit to you our standard Change Request Form, which shall describe the proposed change(s) to the project, including the impact of the change(s) on the project scope, schedule, fees, and expenses.

For all change requests which you originate, we shall have a minimum of 3 business days from receipt of the change request to research and document the proposed change, and prepare the Change Request Form.

You shall have 3 business days from your receipt of a completed Change Request Form to accept the proposed change(s) by signing and returning the Change Request Form. If you do not sign and return the Change Request Form within the time period prescribed above, the change request will be deemed rejected and we will not perform the proposed change(s).

No change to this project shall be made unless it is requested and accepted in accordance with the process described in this section. We shall have no obligation to perform or commence work in connection with any proposed change until a Change Request Form is approved and signed by the designated Project Managers from both parties.

2.2 Project Completion

The project will be considered complete when the designated IMAP mailboxes (approximately 21,000) have been migrated to Hosted Exchange Online, part of the Microsoft’s BPOS Standard Suite.
### 3 Project Organization And Staffing

#### 3.1 Project Roles and Responsibilities

This section provides a brief description of key project roles and responsibilities.

**Customer Project Roles and Responsibilities**

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities</th>
<th>Project Commitment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Project Sponsor</td>
<td>• Makes key project decisions, assists in escalating unresolved issues to the Executive Steering Committee, and clears project roadblocks</td>
<td>Part time</td>
</tr>
<tr>
<td>Customer Project Manager</td>
<td>• Primary point of contact for Microsoft team</td>
<td>Part time</td>
</tr>
<tr>
<td></td>
<td>• Responsible for managing and coordinating the overall project</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Responsible for resource allocation, risk management, project priorities, and communication to executive management</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Manages day-to-day activities of the project</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Coordinates the activities of the team to deliver deliverables according to the project schedule</td>
<td></td>
</tr>
<tr>
<td>Technical Team Lead</td>
<td>• Primary technical point of contact for the team that is responsible for technical architecture and code deliverables</td>
<td>Part time</td>
</tr>
<tr>
<td>Lead Business Analyst</td>
<td>• Primary functional point of contact for the team that is responsible for functional business analysis</td>
<td>Part time</td>
</tr>
</tbody>
</table>

Table 2. Customer roles and responsibilities

**Microsoft Project Roles and Responsibilities**

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities</th>
<th>Project Commitment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft Deployment Consultant</td>
<td>Responsible for overall project success. Key items owned by the Deployment Consultant include:</td>
<td>Part time</td>
</tr>
<tr>
<td></td>
<td>• Internal project kickoff meeting</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Customer kickoff meeting</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Customer status reporting</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Coordination of all required Microsoft and Partner resources</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Technical Point of Contact during deployment</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Handling of required project escalations</td>
<td></td>
</tr>
</tbody>
</table>

Table 3. Microsoft roles and responsibilities
4 General Customer Responsibilities And Project Assumptions

Microsoft and the Customer must collaborate to achieve successful migration. Key customer tasks are outlined in this section.

4.1 General Customer Responsibilities

Delivery of our services depends upon, among other things, the following:

- Your involvement in all aspects of the services
- Your ability to provide accurate and complete information, as needed
- Your timely and effective completion of the responsibilities, as identified herein
- The accuracy and completeness of the Assumptions, identified below
- Timely decisions and approvals by your management

In addition to any Customer activities identified elsewhere in this SOW, you will perform or provide the following:

- Scheduling when each mailbox will be migrated
- All communication with end users
- Ensuring that Microsoft Outlook 2003 or higher or Entourage for Mac is deployed to each end user workstation and configuring the Outlook mail profile, along with the SSO Client. Both Windows and Macintosh have SSO clients. Those users without the SSO client would be able to access their email and calendar items via the web client (OWA). Alternatively, users without the SSO client could use POP3 or IMAP for connecting.
- Tier 1 and Tier 2 end user support
- Migration of client-side data (if desired)
- Provide suitable work spaces with desks, chairs, telephones, etc.
- Provide LAN connections giving the Microsoft onsite team access to the Internet and e-mail
- Assume responsibility for management of all non-Microsoft managed vendors
- Work with the Microsoft Project Manager to deliver the Project on schedule
- Make key day-to-day decisions and provide a single point of contact
- Provide personnel who are knowledgeable about the current Customer systems
- Provide business user representatives as required by the project plan
- Provide all test cases, test data, procedures, and personnel needed to conduct the acceptance testing of the solution, including interfaces
- Provide access to all necessary Customer work sites, systems logon and passwords
- Provide access to other materials and resources as needed, and as advised by us in advance
- Provide access with proper licenses to all necessary tools and third party products required for Microsoft to complete its assigned tasks
- Acquire and install the appropriate server capacity required to support the development and test environments as defined in the scope section of this SOW.
- Decommission and remove on-premise messaging environment as necessary.

The customer is responsible for ensuring that the following pre-requisite tasks and activities have been completed prior to the kick off meeting.
Migration software purchased along with 3rd party professional services (will vary with region and customer scenario) including setup, install, configuration and verification that the tools are working.

Migration workstations configured, (10-20 nodes) (spec for machine agreed during CDD)

VPN access to customer network, validated prior to kickoff

Login accounts on customer AD and Notes, remote access to migration workstations

Dirsync infrastructure installed and configured

Federation servers and gateway configured (future)

BPOS & BES licenses acquired and validated (all, or enough for near term pilot)

Trial site configured with unique (new) live id

DNS domains added to trial site and validated

Office workspace with unrestricted internet access for entire team

Building access passes, (24x7) preferred (we do not work 9-5)

Test mailboxes on source mail system with bulk data representative of typical user roles

Distribution list sourcing strategy defined

Initial password distribution strategy defined

SMTP application defined

Blackberry users identified (in a list)

AD GAL import strategy and source of truth defined AD data import completed

Client packaging complete with tested distribution (sign-in client, outlook, live meeting, search, .net framework)

Migration communications plan established, materials and collateral developed and validated

Identification of migration scheduling person and process

TLS configured on SMTP servers

Network impacts identified, network remediation (upgrade) completed

### 4.2 Project Assumptions

The Services, fees, and delivery schedule for this project are based on the following assumptions:

- The standard work day for the project (e.g., between 8:00 AM and 5:00 PM GMT-7 hours, Monday through Friday, except for scheduled holidays)

- Site readiness activities that are a prerequisite for the successful completion of MCS tasks are completed prior to project kick-off. Failure to complete all site readiness activities that are required for Microsoft to deliver its services according to the agreed upon project schedule may result in project delays requiring Change Orders to this SOW as well as additional project costs. Site readiness includes activities listed under the Customer Responsibility section above.

- Microsoft will provide links to publically available training content for Microsoft Office Outlook, Exchange Online and related services.

- University of Arizona has applied for the Exchange 2010 Technology Adoption Program and are awaiting their formal acceptance into the Program.
Throughout the project, Microsoft will submit requests for decisions or feedback for your completion. Decisions are assigned due dates, and it is assumed that Customer will provide the required feedback or make decisions on either the due date agreed upon or (3) business days from the date of submittal. If a decision or feedback is not provided within the due date or (3) business days, it will be addressed as a potential change of scope pursuant to the Change Management process outlined in this SOW.

5 Exhibits

5.1 Exhibit 1. Change Request Form

This Change Request to the Statement of Work (SOW) is made pursuant to the Work Order No. 20100447, by and between University of Arizona ("Customer," "you," "your") and Microsoft Corporation or its affiliate ("Microsoft," "us," "we," "our"). The terms of the SOW are incorporated herein by this reference.

<table>
<thead>
<tr>
<th>Change Requested</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change Request No:</td>
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<tr>
<td>Project Area affected:</td>
</tr>
<tr>
<td>Date Initiated:</td>
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<tr>
<td>Date Required:</td>
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<tr>
<td>Name of Requestor:</td>
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<tr>
<td>Contact Phone:</td>
</tr>
<tr>
<td>Description of Change Request:</td>
</tr>
<tr>
<td>Justification for Change Request:</td>
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</table>

Estimated Impact of Investigation

<table>
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<tr>
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<th>Estimated Cost</th>
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<tbody>
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Expense Description

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<th>Expense Description</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Click here and type.</td>
<td>Click here and type.</td>
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</tbody>
</table>

TOTAL ESTIMATED COST OF INVESTIGATION: 

Click here and type.
Approve/Reject for Investigation

<table>
<thead>
<tr>
<th>Change Request Disposition</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>□ Approved</td>
<td>□ Rejected</td>
</tr>
</tbody>
</table>

Approvals

For University of Arizona:

CLICK HERE AND TYPE SIGNER’S NAME, TITLE
Date

For Microsoft:

____________________________  ______________________
MSFT Project Manager
Date

____________________________  ______________________
MSFT Partner Project Manager (optional)
Date

Estimated Impact of Implementation

Project Impacts

<table>
<thead>
<tr>
<th>Tradeoff Matrix</th>
<th>Impact on Project</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scope:</td>
<td>Click here and type.</td>
</tr>
<tr>
<td>Resources:</td>
<td>Click here and type.</td>
</tr>
<tr>
<td>Schedule:</td>
<td>Click here and type.</td>
</tr>
</tbody>
</table>
## Fee and Expense Impact

<table>
<thead>
<tr>
<th>Resource</th>
<th>Estimated Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Click here and type.</td>
<td>Click here and type.</td>
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<td></td>
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<tr>
<td>Expense Description</td>
<td></td>
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<td>Click here and type.</td>
<td>Click here and type.</td>
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<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>TOTAL ESTIMATED COST:</td>
<td>Click here and type.</td>
</tr>
</tbody>
</table>

## Approver Comments

Click here and type.

## Approve/Reject for Implementation

<table>
<thead>
<tr>
<th>Change Request Disposition:</th>
<th>□ Approved</th>
<th>□ Rejected</th>
</tr>
</thead>
</table>

## Approvals

### For University of Arizona:

CLICK HERE AND TYPE SIGNER'S NAME, TITLE

___________________________  _______________________

For Microsoft:

___________________________  _______________________

MSFT Project Manager  Date

___________________________  _______________________

MSFT Partner Project Manager (optional)  Date
Appendix

Proposed Changes to SOW

From:
Click here and type.

To:
Click here and type.

From:
Click here and type.

To:
Click here and type.

5.2 Exhibit 2. BPOS Migration Approach

Migrations are comprised of four phases. Although it is not recommended, a customer environment may be in a specific phase of a complete migration for an extended period of time. The phases of a migration are:

1. Discovery
2. Parallel
3. Co-Existence
4. Complete Migration

Migrations may be done in one “hop” from beginning to end, or they may be performed in stages/ phases.
5.2.1  Discovery

Customers use a variety of tools to understand and document their current messaging environment. Identification and verification of pre-migration requirements, as well as third-party or legacy systems or applications that are dependent upon the current messaging environment.

Tools used during discovery include ADTD/ADMap, ExMap, and MOSDAL among others.

The discovery phase includes analysis of the following customer provided information:

- Current Active Directory Implementation
- Type of Current Messaging Environment
- Mailbox Information
- E-Mail Client Software
- E-Mail Dependencies (E-Mail-Enabled Applications, Legacy Applications, Legacy Systems)
- Number of Objects to be synchronized
- Network Information
- Network Bandwidth
- Help Desk Resources required
- Required Permissions
- Client Computer Information
- User Information
- Backup and Restore Procedures
- Known problems in current infrastructure that might adversely affect the implementation
- Servers that must remain after migration
- User training for Microsoft Outlook
- Communications process to keep management, IT administrators, help desk personnel and users updated regarding implementation progress

5.2.2  Parallel Systems

Messaging environments that never ‘touch’ other than regular email traffic via standard SMTP protocols and internet routes. Each environment is in its own address space. Customers retain two mailboxes, one in each system. This is common during trials of Microsoft Business Productivity Online Standard Suite.

- This is a “No-Migration” phase.
The customer has a fully functioning hosted Messaging environment and a Microsoft BPOS-S messaging environment.

Each messaging environment is in its own address space. The messaging environments are not integrated, and never “touch” other than regular email traffic via standard internet routes.

Users will have one mailbox in the Hosted environment and one mailbox in the BPOS-S environment.

There is no Directory Synchronization. There is no shared GAL. There is no SMTP forwarding in either direction. There is no shared Calendaring other than standard internet mail traffic between the Hosted environment and Microsoft BPOS-S environment is via standard internet routes.

Customers may be utilizing POP3/IMAP4 Client functionality of Outlook 2007 and Outlook Anywhere as messaging clients.

The customer has already signed up for the Microsoft BPOS-S service and provisioning is complete.

Customers may be in this stage during their trial phase of Microsoft BPOS-S.

The customer may plan to run both environments as “stand-alone” messaging environments.

The customer Hosted environment may be in this phase while preparing to meet the requirements for migration to BPOS-S.

## 5.2.3 Coexistence of Systems

Two messaging environments that are independent, but at various states act as cohesive parts of a customer’s complete messaging environment. Users with mailboxes undergoing migration will have one mailbox in the On-Premise environment and one mailbox in the BPOS-S Online environment until completion of the migration and decommission of the on-premise mailbox. In addition, customers may also have some users who have mailboxes in the On-Premise environment only, and other users who have mailboxes in the BPO-S Online environment only.

**Start of Phase Description:** Transitioning from Phase 2 of migration to Phase 3 of migration. All steps in Phase 1 and Phase 2 have been completed. Customers have an Active Directory with a functional level of Windows 2000 or greater. The customer has no on-premise messaging environment, it is instead a IMAP4 environment. The customer has already signed up for the BPOS-S service and Provisioning is complete. Proper messaging clients have been installed as the mail client for all users to be migrated to BPOS-S.

**End of Phase Description:** Phase 3 does not depict a complete migration. It is instead a ‘snapshot’ depicting the state of a customer’s messaging environment during this phase in the migration process. In Phase 3, customers are migrating user mailboxes from the IMAP4 messaging environment to the BPOS-S Online environment. Users with mailboxes undergoing migration will have one mailbox in the Hosted messaging environment and one mailbox in the BPOS-S Online environment. Users who have not been selected for migration at this time will have mailboxes located in the Hosted messaging environment. Migrated users experience a seamless GAL (MSOL), Calendaring, Tasks, Shared Documents (if SharePoint has been chosen by the customer and added to their BPO-S service offering) and Mobile Access with other users who have already been migrated.
5.2.4 Complete Migration

Migration of the customer’s email system to Microsoft Business Productivity Online Services Suite. Decommissioning of the on-premise messaging environment (where applicable) and updating existing DNS records to utilize Microsoft Business Productivity Online Services as the primary messaging environment.

**Start of Phase Description:** In this phase, the IMAP Messaging Environment is being fully migrated to the BPOS-S Online Environment. Prior to this phase, the Hosted Messaging Environment may have been, at specific points in the migration, in both the Parallel and Coexistence phases. In this phase, customers are migrating any remaining mailboxes from the hosted messaging environment to the BPOS-S Online environment. Users with mailboxes undergoing migration will have one mailbox in the hosted messaging environment and one mailbox in the BPOS-S Online environment. Users who have not yet been selected for migration, will have mailboxes located in the hosted messaging environment.

**End of Phase Description:** Customer has migrated all mailboxes from the third-party hosted messaging environment to Microsoft Online and is utilizing proper messaging clients aligned with the BPOS-S Online environment (such as Outlook 2007 with the SSO Client).

Users who have already been completely migrated will have mailboxes in the BPOS-S online messaging environment, and their hosted mailbox should be deleted/decommissioned upon determination that the data has been transferred successfully and a copy of the mailbox has been made as necessary or required by the company.

Customers experience a seamless shared GAL, Calendaring, Tasks, Shared Documents (if SharePoint has been chosen by the customer and added to their BPO-S service offering) and Mobile Access.
5.2.5 Migration Process Workflow Overview Diagram

- **Phase 1: Discovery**
  - **Evaluation of On-Premise AD and Messaging Environment**
    - Type of Current Messaging Environment
    - Mailbox Information
    - E-Mail Client Software
    - E-Mall enabled applications
    - Number of AD objects to be synchronized
    - Network Bandwidth
  - **Add SMTP Domain**
    - Add Existing Domain as External Relay
  - **E-Mail Coexistence**
    - Add Existing Domain as External Relay
    - Enable TLS (Recommended)
    - Enable GAL Sync
    - Install Directory Sync Tool

- **Phase 2: Parallel Systems**
  - **Evaluation of On-Premise AD and Messaging Environment**
    - Existing fully-functioning messaging environment
    - Microsoft SPOS-S messaging environment
    - Each environment has its own address space
  - **E-Mail Coexistence**
    - Add Existing Domain as External Relay
    - Enable TLS (Recommended)
    - Enable GAL Sync
    - Install Directory Sync Tool

- **Phase 3: Coexistence of Systems**
  - **Evaluation of On-Premise AD and Messaging Environment**
    - Environments are not integrated
    - Users have one mailbox in each environment
  - **E-Mail Coexistence**
    - Add Existing Domain as External Relay
    - Enable TLS (Recommended)
    - Enable GAL Sync
    - Install Directory Sync Tool

- **Phase 4: Complete Migration**
  - **Complete Migration**
    - Delete Local Mailboxes
  - **Setup CNAME record for Autodiscover**
  - **Switch MX Records**
  - **Set Company Domain to Authoritative**

- **Migration Process**
  - Add SMTP Domain
  - Create User Accounts
  - Install Migration Tools
  - Determine POP3/IMAP Server Access Methods
  - Create .csv File for POP3/IMAP Mailboxes
  - Import List of Mailboxes
  - Run Internet Migration Wizard
  - Select folder Mapping
  - Select Date Range
  - Migrate Mailbox Content

- **Determining Environment Complexity**
- **Preparing On-Premise environment to meet migration requirements**
- **Deployment**
  - Install Migration Tools
  - Activate Selected Users
  - Confirm Migration Prerequisites
  - Select Exchange Mailboxes
  - Run SPOS-S Migration Tool
  - Install SISD Client