

*As agencies prepare to migrate to the Microsoft 365 platform, there are several readiness activities that should be reviewed. This document provides AITRs with the timeline, activities and resources available to help successfully navigate these pre-migration activities.*

## Overview of Major Changes

The messaging transition is more than just moving email from Gmail to Outlook. At a high level, agencies will be impacted by the following changes:

- Platform applications – The move to Microsoft will result in usage, feature availability differences among the enabled platform applications. View this [webpage](#) for a breakdown of these changes.
- Mobile device management (MDM) – Current Google profiles will need to be removed from mobile devices as part of migration. In addition, staff will need to install and configure Microsoft Intune or Workspace ONE to access their data. As the AITR, you will need to determine which MDM solution will be used by your agency. Microsoft Intune is the basic option and replaces Google MDM; Workspace ONE is the advanced option and replaces AirWatch.
- Archiving – The archiving solution will move from Vault to Microsoft Purview.
- Workplace collaboration services (WCS) – This VITA service has been retired. NTT DATADATA assumed support for SharePoint, OneDrive and Teams as of May 1. Starting July 1, there will be no discrete charges for Microsoft messaging platform customers as the services will be covered by the existing Microsoft messaging platform rates.

## Migration and Activity Timeline

Below is the migration timeline. As a reminder, all Commonwealth agencies are expected to be migrated to the Microsoft 365 platform by the end of fiscal year 2023 (FY23). AITRs should review this list for general awareness and for any activities that they will need to complete:

- No later than (NLT) May 6: Submit your [request for solution \(RFS\)](#) to migrate to Microsoft 365. If your agency has not yet submitted your RFS, please do so as soon as possible as its submission will kick off migration activities with NTT DATA.
- June 6: VITA pilot will conclude. Data collected will be used to refine future agency migrations and lessons learned will be shared with your agency for planning purposes.
- NLT June 15: Validate your agency's messaging license consumption (Email, MDM, Virtru, etc.) to avoid additional charges for FY23.
- NLT June 30: Additional phase one pilots will conclude. Data collected will be used to refine future agency migrations and lessons learned will be shared with agencies for planning purposes.
- NLT July 31: Identify agency staff who will serve as your agency's messaging transition support team. Assemble your team and establish a regular meeting cadence to ensure the team is fully prepared to support your agency's migration.
- Aug. 12, 2022 to June 30, 2023 – A rolling migration schedule will commence to move agencies from Google to Microsoft 365. Migrations will occur in groups based on agency blackout dates, preferred migration timeframes, capacity and readiness. During this timeframe, please plan to conduct the following:

- 60 days before migration:
  - Science Applications International Corporation (SAIC), NTT DATA and the VITA business readiness team will host a project kickoff meeting with your agency to discuss project scope, objectives, key activities, and roles and responsibilities of all parties. After the meeting, you will receive a questionnaire for your upcoming discovery session, as well as a communication packet that your agency's messaging migration support team can customize.
  - NTT DATA will hold a technical discovery session with your agency to capture requirements, risks and issues relative to your agency's migration.
- 45 days before migration: Initiate your agency's communication plan.
- 21 to seven days before migration: Hold agency town halls or all-hands meetings to educate staff and set expectations. Train your agency's support staff who will provide first-line support for agency staff on common questions related to the use of the Microsoft 365 platform.
- One week before migration: Ask end users leave their machines on overnight for the week prior to migration to ensure they receive any essential migration-related pushes.
- Day of cutover: Identify a group of staff to test and validate your agency's migration.

### **AITR Pre-Migration Activities**

Prior to your agency's migration, AITRs should perform the following activities to ease their agency's transition to Microsoft 365.

- Leverage your business relationship managers (BRMs) and customer account managers (CAMs). Your assigned agency BRM and CAM are available throughout the migration to field any question or concern you may have.
- Validate data and true-up licensing – To ensure your agency's data is accurate and up-to-date, review the allocation of licenses for messaging services. Performing this activity will ensure your agency avoids paying for unused licenses in the new fiscal year. At a minimum, the review should encompass licenses for:
  - **Email** – All mailboxes, including: personal, delegated, group/shared and resources
  - **MDM** – Please note that starting in FY23, agencies will see a discrete monthly cost of \$2.79 for the MDM service.
  - **Virtu Email and Data Encryption**
  - **Vault and Vault for Former Employee (VFE)**
- Identify and train your messaging transition support team – To assist end users, VITA recommends establishing a team within your agency to assist with your migration. As each agency's migration will be unique in nature, agencies are responsible for the appropriate level of training for their identified support staff. Training resources have been developed and can be found [here](#). Once trained, your team can act as initial points of contact within work units to field how-to questions, address common usage issues, and direct staff members to the proper channels for questions and issues.
- If available, engage your agency's communication, training and records retention resources. These roles should be a part of your agency messaging transition support team.
- Develop an agency communication plan, set up training and establish a support channel:
  - Review and customize the communication plan template – VITA has prepared a messaging communications plan packet that you can leverage to prepare your agency for migration. You should work with your messaging transition support team to customize this packet to fit your agency's migration schedule and needs.
  - Schedule agency town halls – Plan to schedule town hall meetings where agency staff can learn more and ask questions about the upcoming migration.

- Establish a channel for end-user support – While the [VCCC](#) can always be leveraged for questions and issues, VITA encourages you to consider developing an intra-agency outreach mechanism for end users with issues and questions regarding the migration. As examples, you could create a Microsoft Teams site or an agency intranet site as a messaging migration hub. Additionally, you could set up an internal agency help desk that leverages your trained support staff who should be familiar with any specific issues related to your agency's environment. On Day 1 post go-live, you can deploy support mechanisms to assist end users with navigating the Microsoft 365 platform, as well as documenting any encountered issues and their remediation.

### **Pre-Activities for Your End Users**

As a reminder, all end users should complete the following set of actions prior your agency's migration.

- Have your staff review the [Pre-Migration Readiness document](#) so they can orient themselves to actions they can perform prior to your agency's migration.
- Document Google label structure – As part of the migration, Google labels will be split into both folders and categories in Microsoft Outlook. To ensure Inboxes look and feel the same in Outlook, end users should document their current labels ahead of migration. Post migration, end users can refer to the [Label Migration from Gmail to Outlook job aid](#) for step-by-step instructions on recreating their Inbox in Microsoft 365.
- [Training resources](#) are available to end users pre- and post- migration for them to learn about the functionality of Outlook, OneDrive, SharePoint and many of the Microsoft suite applications.

### **Relevant Links**

- [Pre-Migration Readiness](#) – This document is designed for end user use and highlights the activities your staff should complete prior migration.
- [Training resources](#) – More than 60 video training modules and additional job aids and guides have been developed to help end users learn the functionality of Outlook, OneDrive, SharePoint and many of the Microsoft suite programs.
- [Messaging migration hub](#) – VITA developed a support website to serve as a one-stop location for information and training on the migration. Please direct end users here for educational purposes and self-help.
- [VCCC](#) – End users can contact the VCCC for any questions or issues they may have.