VIRGINIA IT AGENCY

MESSAGING: AGENCY TRANSITION

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AGENDA

- Messaging overview
- Messaging transition
- What to expect?
  - Pre and post migration
  - Look ahead
- Resources and training
- What can I do now?

OVERVIEW

- Major components of messaging transition:
  - Email, calendar, contacts, OneDrive, productivity applications
  - Operational responsibility and backend - help desk, routing/filtering, etc.
  - Archive, eDiscovery and records management -
  - Mobile device management (MDM) - Google Policy to InTune/WorkspaceOne
- No statewide “big switch” cutover:
  - Phased rollout to minimize impact on agency operations.
- Agency Microsoft 365 (M356) migrations scheduled to accommodate agency business needs

Core messaging changes

- Improved digital loss prevention, anti-spam, anti-malware and security
- Platform-agnostic archiving
- Broad MDM capability

What does M365 look like?

- MS Office products
- MS Outlook for mail
- MS Teams for chat and collaboration
- Web, mobile and desktop
- Native SharePoint integration
- Guest access to Google tools
- Teams chat retention period set by agency at transition

ROADMAP: AGENCY TRANSITION

Prepare

- Review resources and FAQs
- Submit request for solution (RFS)
- Identify:
  - Key players
    - Migration Team Lead
    - Agency Training Lead
    - Agency Communication Lead
  - Key resources:
    - Records Management
  - Potential issues:
    - Application Dependencies
    - Security Policy Dependencies
    - Critical Business Functions
    - Critical Business Users
- Draft timeline

Plan

- Technical discovery sessions with NTT Data & Business relationship manager (BRM)
  - Complete Questionnaire
    - Application Dependencies
    - Security Policy Dependencies
    - Critical Business Functions
    - Black out dates
- Develop migration activities timeline
- Develop and initiate agency training plan
- Develop and Initiate agency communication plan
- Develop plan for manual conversations. Examples: Google Forms; re-establish permissions; organizer calendar updates
- Develop plan for distribution lists

Pre-Migration

- Host agency meetings
- Post FAQ's on agency intranet site
- Execute communication plan
- Train super-users, records officers and other SMEs
- Distribute "How to Prepare for the Migration"
- Customize Post Migration Guide for your agency
- Print "Post Migration Guide" for desktop
- MDM - Validate licenses
- Users perform manual conversions
- Agency IT resource (AITR) monitors ongoing migration exceptions dashboard

Migration

- Deploy Super users
- Setup and/or validate MDM on mobile devices
- Agency cutover to M365
- Day 1 activities "Post Migration Guide"
- Validate archiving access
- Validate final migration exceptions log report

Post-Migration

- VCCC & super user ongoing support
- Resolve any outstanding issues within two weeks
- Complete mobile devices access management
- Survey & VITA feedback

Messaging FAQ's

Functions	Google	Microsoft
Word processing	Docs	Word
Spreadsheets	Sheets	Excel
Presentations	Slides	PowerPoint
Email	Gmail	Outlook
Web pages	Sites	SharePoint
Storage	Drive	OneDrive
Instant Messaging	Chat	Teams
Video conferencing	Meet	Teams
Note taking	Keep	OneNote
Calendaring	Calendar	Outlook
Contacts	Contacts	Outlook
Interoperability - Microsoft Identity Management will be used to keep the global address lists in sync to make sure the users, groups and contacts stay in sync across the various platforms.		

ON-DEMAND TRAINING

All training modules have been developed, reviewed and approved based on VITA standards with closed captioning included. All users can access via the VITA Knowledge Base with course descriptions and filtering capabilities.

Service Portal

We have 78 training courses developed across products ranging from:

- Microsoft Office 365
- Google Workspace
- Mobile device management
- Account management
- Messaging services

This estimates to 280+ minutes of training across 64 training videos and 14 job aids.

PRE - MIGRATION

M365 TRANSITION FOR AN AGENCY (PRE-MIGRATION)

- Action items:
    - Validate licenses for MDM, Virtru
    - NTT Data and your BRM will conduct discovery sessions to fine-tune each agency transition
    - Identify and train training coordinators, SMEs, super users, internal help desk and records officers early
- Proactive user communications and shared training resources
    - Leverage the agency training plan
- Review readiness guides (pre & post migration, AITR)

AGENCY CUSTOMIZATION – COMMUNICATION TO END USERS

9 MIGRATION COMMUNICATION BREAKDOWN

Comm1
1 Month Prior to Go-Live

- Agency head template (optional for agencies if interested)

Comm2
1 Month Prior to Go-Live

- Your agency is next to conduct Migration
- What to expect
- Important dates
- Training is available
- Next steps

Comm3
3 Weeks Prior to Go-Live

- Description of the phases within the migration approach
- Introduce the Pre-Migration Checklist
- Training is available
- Next steps

Comm4
2 Weeks Prior to Go-Live

- Migrations have begun
- Feature of the Pre-Migration Checklist
- Important dates
- Training is available
- Next steps

Comm5
1 Week Prior to Go-Live

- Cutover the following weekend
- No access to systems
- What to expect
- Introduce the Post-Migration Checklist
- Training is available
- Next steps

Comm6
3-4 Days Prior to Go-Live

- Feature of the Post-Migration Checklist
- Training is available
- Next steps

Comm7
2 Days Prior to Go-Live

- Feature of MDM Checklist
- Training is available
- Next steps

Comm8
At Go-Live

- You're live!
- Validate all is migrated and working as planned
- 2 weeks to complete validation activities
- Training is available
- The process for getting support

Comm9
1 Week Post Go-Live

- Reminder of Post-Migration Checklist
- Reminder that validation window closes in 1 week, license removed
- Training is available
- The process for getting support

Sampling of major customer touchpoints that can be customized by agency IT resources (AITR) for individual agency use

AITR step-by-step guide

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AITR Google to Microsoft 365 Pre-Migration

As AITRs prepare to migrate their agency to the Microsoft 365 platform, there are several readiness activities they will need to complete. This document provides AITRs with the timeline, activities and resources available to help successfully navigate their agency's pre-migration activities.

Overview of Major Changes

As you are aware, 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 and availability differences amongst the enabled applications on the platform. 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 Workspace One and/or Microsoft Intune to access their data.
- Archiving – Will move from Vault to a new archiving solution.
- Workplace Collaboration Services (WCS) – As of May 1, NTT Data has assumed support for SharePoint, OneDrive, and Teams. Starting July 1, there will be no discrete charges for Microsoft messaging platform customers as WCS will be covered by the existing Microsoft messaging platform rates.

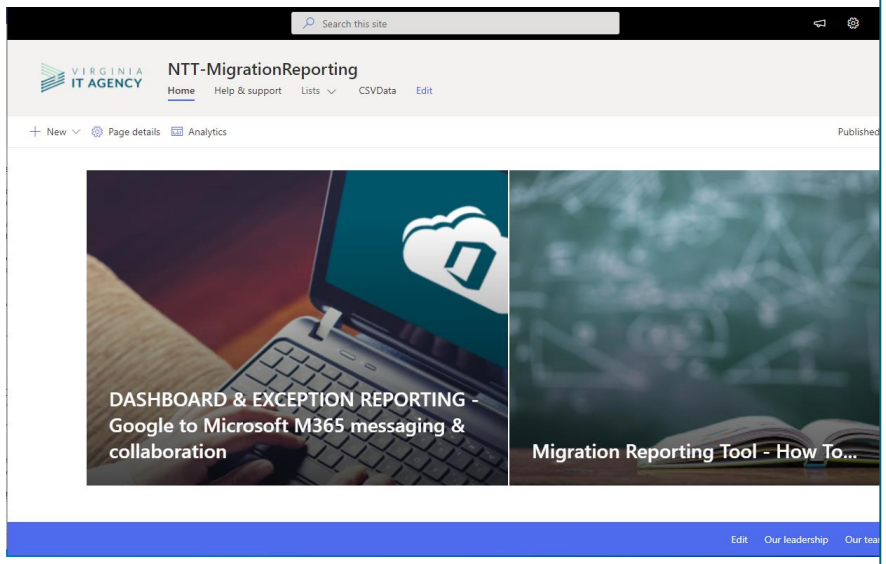
Migration & Activity Timeline

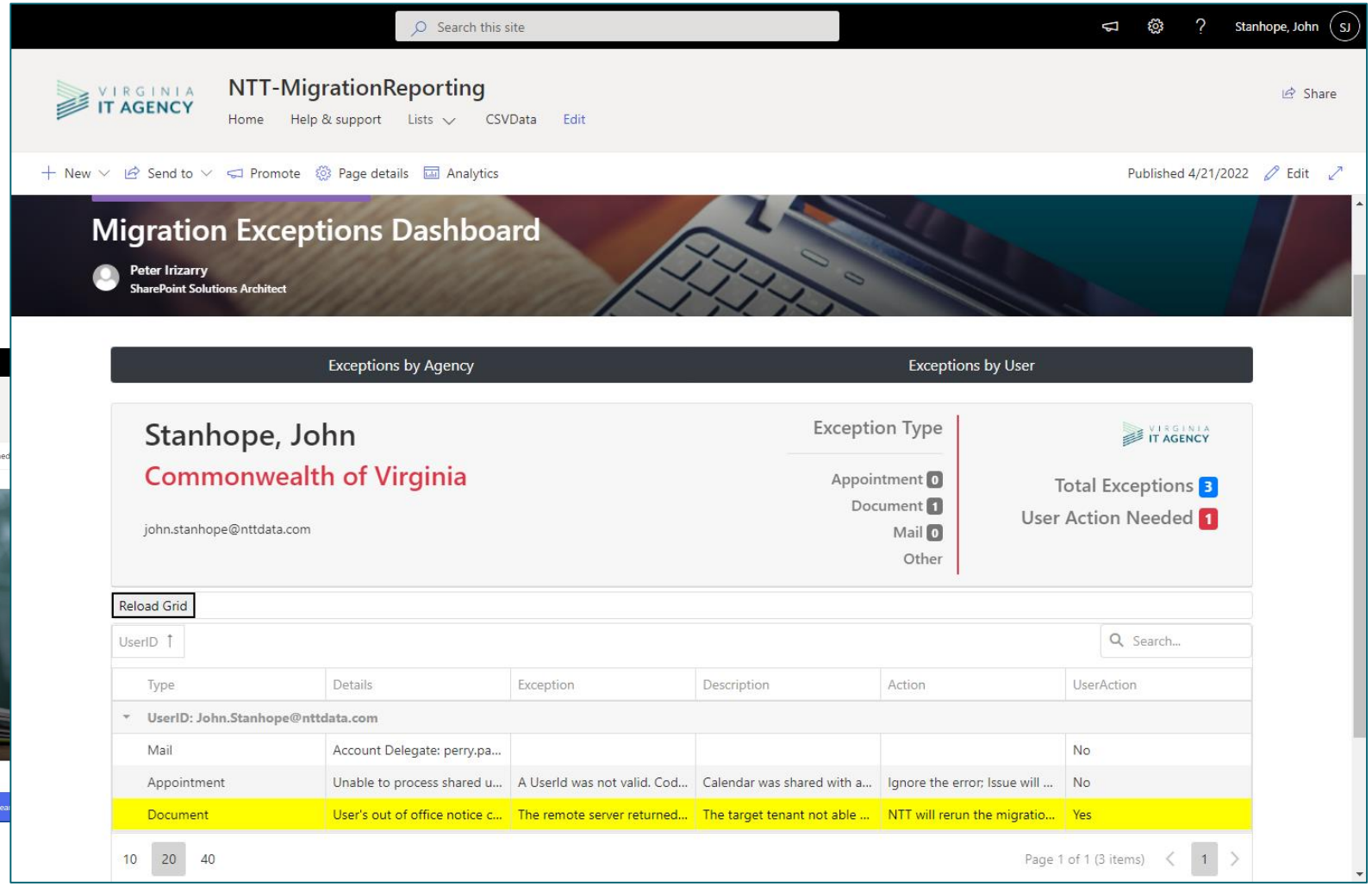
Below is the Migration Timeline. AITRs should review the list for general awareness and for any activities that they need to complete:

- No later than (NLT) May 6: Submit your Request for Solution (RFS) to migrate to Microsoft 365.
- 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 fiscal year 2023.
- NLT June 30: Additional pilots will conclude. Data collected will be used to refine future agency migrations and

PRE-MIGRATION EXCEPTION DASHBOARD FOR AITR'S

- Available to all AITRs
- Live reporting by agency or user





Pre-Migration Readiness

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In preparation for the migration from Google to Microsoft 365, you may need to archive, export or transfer some data or files that are not part of the migration process. It is recommended to leave your computer on the week before your agency migration to receive any software that may be pushed out by the messaging provider.

Quick reference table: What is and is not being migrated? (pg. 4)
Quick reference table: Google Drive attributes migrating to Microsoft OneDrive (pg. 6)

Tip: Save the "Day 1 checklist" to your computer so you can refer to it after migration.

PLEASE REVIEW THE FOLLOWING INFORMATION BEFORE MIGRATION

Review the list of applications below and complete any appropriate tasks that require action. If tasks are not completed, data will not be migrated and you may not be able to recover it after migration.

Archiving: The records management tool, Vault, is being replaced with Microsoft Purview. If you are an agency records manager, please remove expired accounts before migration.

Calendar: Calendar data will be migrated. However, if you are currently the organizer of a meeting(s), you will need to replace the Google Meet link in your calendar entries with a link to a non-Google solution (e.g. Microsoft Teams). You can update the links to calendar events by following the guided steps outlined in this job aid: Updating Calendar Events to Replace Google Meet with Microsoft Teams Conference Details.

Tip: Avoid scheduling critical meetings for the morning after migration to give

POST - MIGRATION

Day one step-by-step guide

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Day 1: Post-migration activities

Now that you've migrated to Microsoft 365, there are a few activities you will need to complete to set up your new Outlook profile and to verify that your files were migrated successfully and that you can access them.

Outlook email on the web: This is the step to access your email on the web.

1. Sign into office.com with your COV credential to confirm you can access your messaging services.
2. Click on Outlook on the left hand panel.
3. Validate that you can see your email.
4. Add your shared mailbox to the web version.

Outlook email for desktop: To set up a user profile in Outlook, please use this job aid: Setting Up a User Profile in Microsoft Outlook.

Microsoft Outlook (email): Your email, calendar items and meetings have been migrated to their new Microsoft 365 account. (Spam and Trash folders did not migrate.)

- **Labels**: Labels and structure in Google are recreated as folders in Outlook.
- **Nested labels**: Nested labels become categories.
- Learn more about how labels are migrated from Google to Microsoft

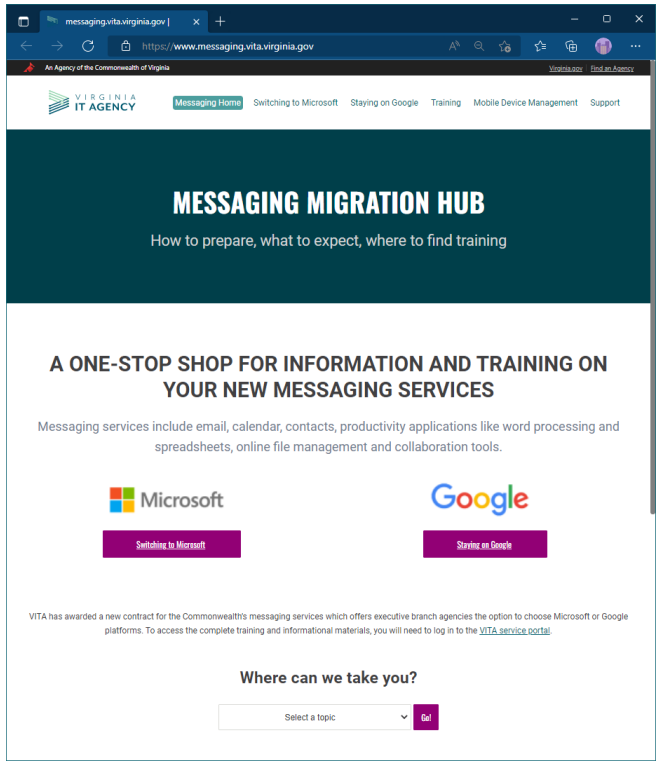
Calendar: Your calendar events have been migrated. Once your Outlook profile is set up, review meetings you have created that may have Google conference information to update them with Teams meeting conference information. Please see: Updating Calendar Events to Replace Google Meet with Microsoft Teams Conference Details.

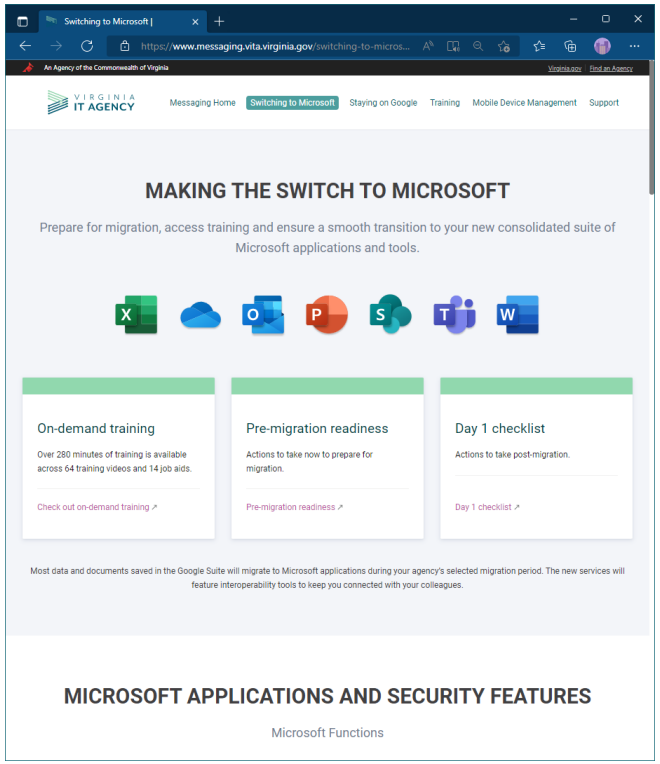
M365 LOOK AHEAD

MIGRATION SUPPORT RESOURCES

- Project support centerpiece:

www.messaging.vita.virginia.gov





- All training available in one place
- Regularly updated living resource
- Will remain accessible throughout all activities, including Day 1 needs
- Contact VITA Customer Care Center (VCCC) for assistance

- Microsoft Lunch and Learn Sessions

Training session and registration link	Date and time
VA-STATE GOVERNMENT: Get Started with Microsoft Teams	Thursday, July 21; 1 – 2 p.m.
VA-STATE GOVERNMENT: Calling and Meetings in Microsoft Teams	Thursday, July 28; 1 – 2 p.m.
VA-STATE GOVERNMENT: Explore Teams and Channels in Microsoft Teams	Thursday, Aug. 4; 1 – 2 p.m.
VA-STATE GOVERNMENT: Go Further Together with Meetings in Microsoft Teams	Thursday, Aug. 11; 1 – 2 p.m.
VA-STATE GOVERNMENT: Microsoft Outlook Level 100	Thursday, Aug. 18; 1 – 2 p.m.
VA-STATE GOVERNMENT: Microsoft Forms Level 100	Thursday, Aug. 25; 1 – 2 p.m.
VA-STATE GOVERNMENT: Microsoft Cloud Storage: OneDrive for Business and SharePoint Online Level 100	Thursday, Sept. 1; 1 – 2 p.m.
VA-STATE GOVERNMENT: Microsoft Planner Level 100	Thursday, Sept. 8; 1 – 2 p.m.

WHAT CAN I DO NOW

- Build your migration working group:
  - Migration lead, training coordinator, communications lead and internal help desk representative (if you have one)
  - Begin identifying SMEs and potential super users
- Walk through what migration looks like for your agency
- Review training materials, videos, KB articles and how to be successful
- Go to the Messaging Hub:
  - Review the Pre-Migration Guide
  - Print the Day One Post Migration Guide
- Continue to leverage customer account managers (CAM) and BRM's as a resource
- Adoption and engagement are **KEY** to agency success!

SUMMARY

- The messaging transition is more than just email
- Guiding intent is *minimal impact* to agency operations
  - No “big switch” statewide events
  - Agency M365 migrations scheduled to accommodate agency business needs
  - Continuous improvement process; expect refinements and adjustments
- Keep your CAM, BRM and working group closely involved
  - Your feedback is critical to everyone’s success

QUESTIONS