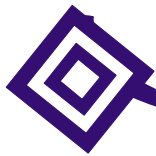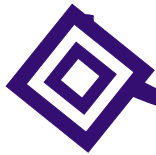# Groupware/Oxford Nexus

Mark Norman / Paul Davis
ICT-F Conference
15 July 2009

What we will cover today
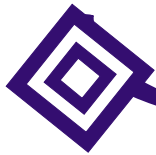
◈ High level overview
- ◈ How did we get here?

◈ Herald migration plans
- ◈ Issues you and your users should know

◈ Alpha/beta testing and early adopters evaluation

◈ Documentation and training plans
- ◈ Including train the trainer/ITSS

◈ A brief overview of Outlook 2007

◈ Migration windows
- ◈ And the 'migration picker'

◈ Test accounts for you?

◈ Further briefings for you

◈ Contacting us

High level overview

- ◈ How we got here…
  - ◈ Req.s gathering, Short-Listing Panel (chose the technologies in July 08)
    - ◈ Exchange (email, calendaring, GAL etc.); SharePoint (for doc. collaboration)
    - ◈ Technologies give integration challenges for OUCS
  - ◈ 2 site resilient architecture
    - ◈ Much design and implementation work
  - ◈ Design and procurement carried out between Oct 08 and Feb 09
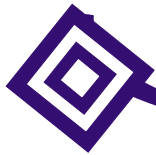
High level overview

◈ General time scales

   ◈ Early adopters for Exchange this summer

   ◈ Herald migrations Sept to Nov this year

      ◈ Completed by Christmas 09

   ◈ SharePoint probably from November

   ◈ BlackBerry possibly from November

   ◈ Other migrations to Nexus

   ◈ (e.g. Domino, Groupwise, other Exchange etc.) from Winter
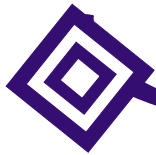
The service

◈ Now branded under Nexus

◈ Regarding the Exchange components:

◈ 2 GB quota

◈ Premium service for quotas over that

Migration plans

- As little impact on the user as possible
  - No mandatory client change (apart from web client)
- Connection settings should 'just work' afterwards
  - i.e. username.herald.ox.ac.uk should route to imap.nexus.ox.ac.uk
  - We would like Outlook users to 'upgrade' to Outlook Anywhere (different connection settings) as soon as it is convenient, however.
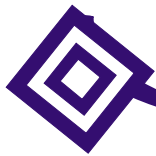
Migration issues

- Exchange reserved names, e.g.
    - Calendar ==> Calendar_Herald
    - Contacts ==> Contacts_Herald
- Virus checking, plan to:
    - Migrate all emails but quarantine emails (or their attachments) that are detected as containing viruses.
- Double quotes and other bad characters in folder names
    - Proving a problem, but not many users
    - Users will be emailed in advanced – asked to change the problem folder names
    - Otherwise migration failure and then will need to manually assist
- Case sensitivity in folder names
    - Email in advance, if case sensitivity still exists, don't migrate **
- Educate and manage problems in advance
- Miss-formed/corrupt messages
    - Will fail: Exchange is less tolerant than Herald
    - May be able to 'package up' corrupted messages as attachments
- Any migration mis-count will cause a migration failure (back to Herald)
- Messages flagged to be deleted?
    - Deleted_Items will be managed with 90 day policy, else normal rules
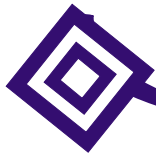
Migration issues
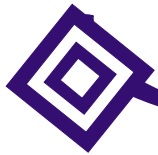
- Check
  - http://www.oucs.ox.ac.uk/nexus/migration.xml
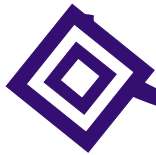- Issues:
  - Flags/tags/marks/labels
    - Warn your users!
  - Folder names (double quotes, slashes, case (in)sensitivity)

The change process: migration failures

- Double quotes and other invalid characters in folder names
- Case (in)sensitivity in folder names
  - Only the first time!
- Folder ending in slash (\ or /) characters
- <u>Users will remain on Herald</u> (no change)
- User and ITSS get failure reports (more detail in the former)

The change process: after

◈ Check

    ◈ http://www.oucs.ox.ac.uk/nexus/migration.xml

◈ Issues:

    ◈ Webmail contacts and contact groups

    ◈ Spam filtering settings (SelfReg)

    ◈ Preferred sender

    ◈ Viruses

    ◈ Corrupted emails

◈ Welcome emails and emails describing 'issues'
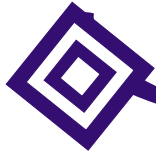
Alpha and Beta testing

- Some early results and conclusions
  - Exchange is not a perfect IMAP server
    - Flag issues
    - Subscription issues (reported as a bug)
  - Mostly the issues taught us about the behaviour of particular clients
    - (against most IMAP servers after a large migration!)
  - And how to improve our documentation
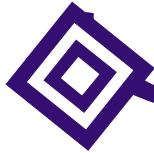
Early adopters:
Our expectations

◈ Not evaluating Exchange *per se*

◈ More the *experience*

  ◈ Do we need more/better documentation?

  ◈ Do users feel supported adequately

    ◈ Locally and by OUCS

  ◈ Could the communications be better beforehand?

  ◈ Finally: how is the software etc.
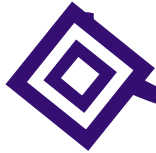
Volume

Type	Numbers
Staff and Students (New)	6,000
Staff and Students (Existing Herald)	32,000
ITSS (who use Herald)	400
Staff and Students (other Groupware systems)	4,000
ITSS (other Groupware system)	200

Migration documentation

Web support:

1. Who will, and will not, be migrated?

2. Why do I need to migrate?

3. What will the email migration mean to me?

4. What should I do before, during and after the migration?

5. Herald features that will transfer automatically to Oxford Nexus

6. Things that may need some attention

7. Things that could cause the migration to fail

8. What happens if the migration fails?

9. How can I find out more about the new Oxford Nexus?
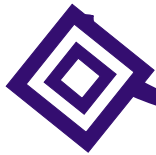
Mixed mode training

a) Central training for trainers courses
b) Central courses– face to face held at OUCS
c) Local courses run by OUCS
d) Local courses run by local trainers
e) Online courses provided by Microsoft IT Academy
f) Online training material created by OUCS
g) Quick Tips Guides
h) Online training material created by others
i) Drop-in sessions on a weekly basis
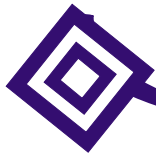
Face to face training

- OUCS presentations across the rollout
  - 1 hour orientation to Nexus
  - Focussed on Outlook, OWA
  - Explains differences for other browsers
- OUCS led presentations on site
  - Timed to match migrations
  - Need assistance with rooms & publicity
- Locally run courses
- In depth courses as part of ITLP
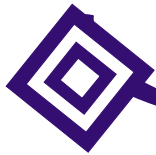
Documentation

- Extensive setup docs
  - 10 different clients
- Brief OWA & OWA light "Getting started"
  - Send a new email message
  - Check for new messages
  - Read an email message
  - Reply to an email message
  - Delete a message
- More detailed OWA guide

Online OWA documentation

1. Managing Folders
2. Restoring deleted items
3. Operations on Multiple Messages
4. Sorting messages
5. Setting Flags and Categories
6. Searching for messages
7. Outlook Rules
8. Contacts and the Address Book
9. Attachments
10. Email Headers
11. Message Options
12. Signatures
13. Calendars
14. Tasks
15. Filtering Emails
16. Out of Office Assistant
17. Login Problems

Outlook 2007

- Gives the optimum feature set
  - Instant Search
  - Quick Preview
  - Categories
  - Prioritisation flag
  - Overlaying calendars
  - Schedule Out of Office message
  - Journals

Outlook 2007

Oxford University Computing Services

OWA on IE

OWA Features Available

Calendaring

View your calendar (day/week/month)
Show time as busy
Track attendee meeting responses
Show time as busy
Create a recurring event

Make events private
Respond with Accept, Decline, Tentative
Make a calendar event 'private'
View a shared calendar
Set a standard workday

Email

Create/view email
Out of Office message
Set message priority
Request read receipt
Full view of headers

Reply to/ Forward
Create email rules
Request delivery receipt
Recover deleted items

Contacts and Tasks

View University address book
Add contacts
View tasks
Edit tasks

View contacts
Edit contacts
Create tasks

Other features

Spell checker   Reading pane
Notifications and reminders
Windows SharePoint Services
Windows file share Integration
Right-click menu
Type-down search
Appearance (colour scheme)

Weekly calendar views
Compose messages by using HTML
Arrange by
Drag and drop   Explicit logon
Resource mailbox management
Voicemail options
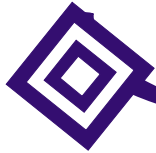
OWA Light Features Available

Calendaring

Make events private

Respond with Accept, Decline, Tentative

Make a calendar event 'private'

View a shared calendar

Set a standard workday

Show time as busy

Track attendee meeting responses

Show time as busy

Create a recurring event

Calendar day view only

Email

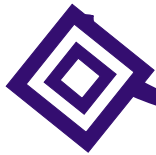Create/View email

Out of Office message

Reply to/Forward

Contacts and Tasks

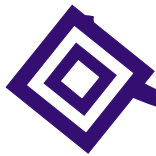View University address book

Add contacts

View contacts

Edit contacts

Other features

Arrange by (limited)

Timetable and migration windows

- 20 July 2009   1st tranche (individual) early adopters
- 27 July 2009   OUCS as a department
- 3-4 Aug 2009   2nd tranche of early adopters (whole, smaller units)
- 1 Sept 2009   New users. Exchange accounts created. (Will already have SSO accounts: mostly students). Also all undergrads and taught course postgrads migrations begin.
- 7 Sept – 2 Oct 2009   1st Herald staff migration window (?half? staff).
- 19 Oct - 6 Nov 2009   2nd Herald migration window (remaining staff)
- End 2009   Residuals (staff).

N.B. "staff" includes research postgrads

The 'migration picker'

Oxford University Computing Services

The 'migration picker'
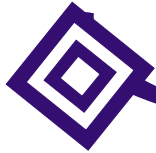
Default windows

- MPLS September
- Social Sciences September
- Humanities October
- Medical Sciences October
- Colleges October
- (Everyone else September, inc ASUC etc.)
- Taught students from 1 September
- Research students with department

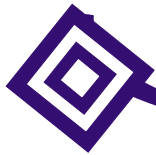# When will I migrate?

- Again, check out SelfReg at
  - https://register.oucs.ox.ac.uk/self/index/

- Change is in the control of local ITSS
  - That's you!
   - Please don't ask OUCS
    - Users will be directed to ITSS
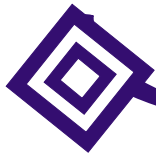
Options for test accounts

◈ Keep ahead of the game!

◈ You may be happy with migrating your own account early at the start of August

   ◈ Email Groupware, Subject ITSS Migrate

◈ You could apply for a project account

The next briefings

◈ 2 Sept: Train the trainer

◈ 7 Sept: Supporting users

    ◈ Aimed at both Windows

    ◈ Will be podcast and advertised prior to W2

◈ Window 1

    ◈ 12 OUCS sessions

    ◈ Planned 12 OUCS led sessions, 40 local led
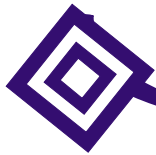
How best to contact us

groupware@oucs.ox.ac.uk

nexusmigration@oucs.ox.ac.uk