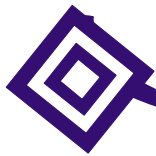


Groupware/Oxford Nexus

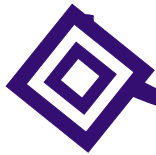


Mark Norman / Paul Davis
ICT-F Conference
15 July 2009



What we will cover today

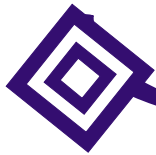
- ◆ High level overview
 - ◆ How did we get here?
- ◆ Herald migration plans
 - ◆ Issues you and your users should know
- ◆ Alpha/beta testing and early adopters evaluation
- ◆ Documentation and training plans
 - ◆ Including train the trainer/ITSS
- ◆ A brief overview of Outlook 2007
- ◆ Migration windows
 - ◆ And the 'migration picker'
- ◆ Test accounts for you?
- ◆ Further briefings for you
- ◆ Contacting us



High level overview

◆ How we got here...

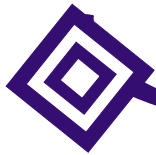
- ◆ Req.s gathering, Short-Listing Panel (chose the technologies in July 08)
 - ◆ Exchange (email, calendaring, GAL etc.); SharePoint (for doc. collaboration)
 - ◆ Technologies give integration challenges for OUCS
- ◆ 2 site resilient architecture
 - ◆ Much design and implementation work
- ◆ Design and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



High level overview

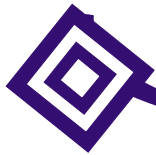
◆ General time scales

- ◆ 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



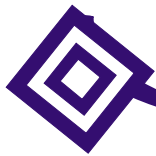
The service

- ◆ Now branded under Nexus
- ◆ Regarding the Exchange components:
 - ◆ 2 GB quota
 - ◆ Premium service for quotas over that



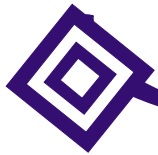
Migration plans

- ◆ 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

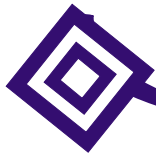
 - ◆ <http://www.oucs.ox.ac.uk/nexus/migration.xml>

- ◆ Issues:

 - ◆ Flags/tags/marks/labels

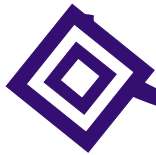
 - ◆ Warn your users!

 - ◆ 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
- ◆ Users will remain on Herald (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

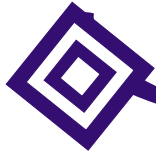
 - ◆ Spam filtering settings (SelfReg)

 - ◆ Preferred sender

 - ◆ Viruses

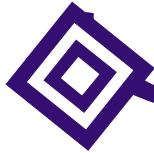
 - ◆ Corrupted emails

- ◆ Welcome emails and emails describing 'issues'



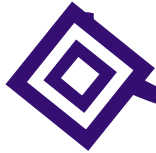
Alpha and Beta testing

- ◆ 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



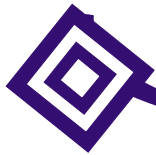
Early adopters: Our expectations

- ◆ 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

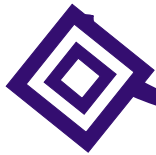
Type	Numbers
Staff and Students (New)	6,000
Staff and Students (Existing Herald)	32,000
ITSS (who use Herald)	400
Staff and Students (other Groupware systems)	4,000
ITSS (other Groupware system)	200



Migration documentation

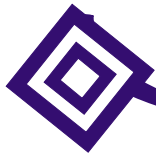
Web support:

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?



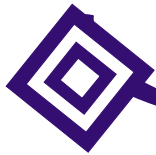
Mixed mode training

- 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



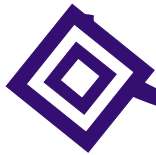
Face to face training

- ◆ 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



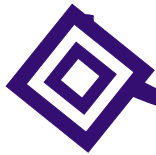
Documentation

- ◆ 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



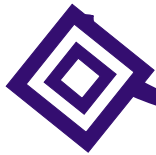
Online OWA documentation

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

The screenshot displays the Microsoft Outlook 2007 interface. The title bar reads "Inbox in paul.davis@oucs.ox.ac.uk - Microsoft Outlook". The menu bar includes File, Edit, View, Go, Tools, Actions, and Help. The toolbar contains icons for New, Reply, Reply to All, Forward, Follow Up, Send/Receive, and Search address books. The left sidebar shows the Mail folder tree with "Inbox" selected. The main pane shows an email list with columns for From, Subject, Received, Size, and Cate... The selected email is from Tony Brett with the subject "[ict-a] ICTF Conference Tomorrow: Joining". The right pane shows the preview of this email, including the sender information and the body text.

[ict-a] ICTF Conference Tomorrow: Joining
Tony Brett [tony.brett@oucs.ox.ac.uk]

Extra line breaks in this message were removed.

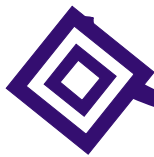
Sent: Tue 14/07/2009 10:14
To: itss-announce@maillist.ox.ac.uk

Dear all,

There will be an email later today detailing times and joining instructions for tomorrow's ICTF Conference. There are 343 delegates this year so it's been a bit tricky in the last minute organisation!

The conference web site is at <http://www.ictf.ox.ac.uk/conference/2009/> and it should tell you a lot of what you need to know. You will get your specific details later on today in a personal email.

If you haven't had



OWA on IE

UNIVERSITY OF OXFORD Nexus
Email Service

Find Someone Options Paul Davis Log Off

Mail << Inbox (9 Items, 6 Unread) Help

New [List] [Print] [Delete] [Move] [Reply]

Search Inbox

Arrange by: Date Newest on top

Today

- Paul Davis 08:29 Outlook Web Access

Wednesday

- Paul Davis Wed 17:48 Morris dancing lives!
- Paul Davis Wed 17:46 Test
- Microsoft Exchange Wed 17:41 Undeliverable: Morris dancing rocks
- Adrian Parks Wed 17:40 test
- Paul Davis Wed 17:40 RE: Welcome to the brave new world!

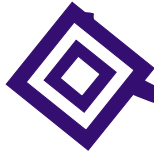
Two Weeks Ago

- Paul Davis 22/05/2009 RE: Welcome to the brave new world!
- Paul Davis 22/05/2009 RE: The first message to here

Items 1 to 9 of 9

Outlook Web Access
Paul Davis [paul.davis@oucs.ox.ac.uk]
Sent: 05 June 2009 08:31
To: Paul Davis

This is the Preview pane. You can see the message contents before you need to open it!
You can turn off the preview pane or move it to the bottom by clicking the button above your list of messages Paul



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

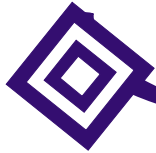
- View University address book
- Add contacts
- View tasks
- Edit tasks

- 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

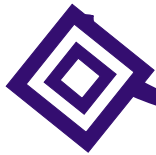
Contacts and Tasks

View University address book
Add contacts

View contacts
Edit contacts

Other features

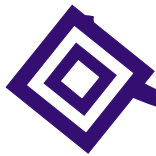
Arrange by (limited)



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'

The screenshot shows a Mozilla Firefox browser window with the title "[oucs] Migrating Herald email to the Oxford Nexus service - Mozilla Firefox". The address bar displays the URL "https://register.oucs.ox.ac.uk/itss/nexus_migration". The page header features the Oxford University Computing Services logo and the title "Migrating Herald email to the Oxford Nexus service".

The main content area contains the following text:

v4.01 09-Jul-2009
© University of Oxford

Search
Feedback
OUCS Home Page

>self-registration
>>user info
>>software
>>tsm backup
>ITSS index

Logged in as:
Mark Norman
(if you're not Mark Norman, click here)
Oxford username:
markn
Logout

Your IP name:
oucs-mnorman.oucs
(129.67.100.31)
Your browser:
Mozilla/5.0 (Windows; U;
Windows NT 5.1; en-US;
rv:1.9.0.11)
Gecko/2009060215
Firefox/3.0.11

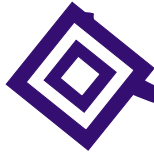
This utility is provided to give IT support staff some control over when their users are migrated to the Oxford Nexus service. There are two migration windows: between September 7th and October 2nd (window 1), and between October 19th and November 6th (window 2). ITSS will be able to change the default migration window for users in their unit(s), or defer them further if necessary. Users whose primary affiliation matches ITSS registration(s) will be selectable.

By default, undergraduates, and graduates on taught courses will be migrated in September. Staff in non-humanities and service units will be also be migrated during September. Staff in humanities units will be migrated during October. College staff will be migrated in October. Graduates doing research work, visitors, and members of Congregation, will be treated as staff.

Please select unit

[ITSS Index](#)

Done register.oucs.ox.ac.uk



The 'migration picker'

Oxford University Computing Services
Migrating Herald email to the Oxford Nexus service

v4.01 09-Jul-2009
© University of Oxford

Search
Feedback
OUCS Home Page

>self-registration
>>user info
>>>software
>>>tsm backup
>ITSS index

Logged in as:
Mark Norman
(If you're not Mark Norman, click here)
Oxford username:
markn
Logout

Your IP name:
oucs-mnorman.oucs
(129.67.100.31)
Your browser:
Mozilla/5.0 (Windows; U;
Windows NT 5.1; en-US;
rv:1.9.0.11)
Gecko/2009060215
Firefox/3.0.11

Computing Services

The following people have an affiliation to Computing Services, based on university card data, and are not due to finish until after October 31st 2009.

Migration Window 1 is between September 7th and September 28th, and Window 2 is between October 19th and November 6th. If you defer a migration, it will be done some time after November 6th. All users will be given at least 2 weeks notice of their account being migrated.

Notes:

1. This selection interface will be locked 3 weeks before each migration window opens.
2. If you think that there are people missing from this list, please [let us know](#) (undergrads, and postgrads on taught courses, are excluded).
3. Where possible **ALL** herald accounts belonging to an individual will be migrated on the same day.
4. You should select 'Not ours' if you believe that another unit gives first line technical support to this user.

Name	Status	Herald Account(s)	Window 1	Window 2	Defer user	Not ours
Alder, Elizabeth	University staff	oucs0036	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ashton, Jonathan	University staff	jashton pgptest	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Austen, Malcolm	University staff	itss0025 malcolm uauug	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Baker, David	Member of	daveb	Planned migration date: 17-jul-2009			

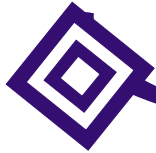
Done

register.oucs.ox.ac.uk



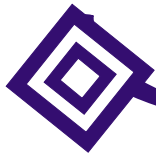
Default windows

- ◆ 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



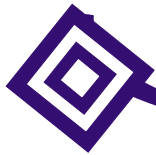
When will I migrate?

- ◆ 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



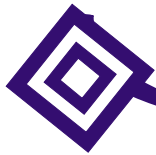
Options for test accounts

- ◆ 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

