



Hybrid approach for the Interchange to FASmail Migration v3.0

Checklist for POP/IMAP/myUBC Portal Migration

UBC IT
Collaboration
Applications



Task	Outcome	User	Client IT or Dept Rep	UBC IT	Issues/Feedback
1. Define Client Code					
1.1. Department or Faculty-level Client Code declared: Short, Medium, and Long names a. IAM short code can be the existing HRMS code b. New IAM code can be a NEW 3-4 letter code that is not already defined in HRMS.	Client Code defined. Will be used in the GAL for classification, email administration purposes, generic/resource/distribution list creation, and future billing purposes.	n/a	Define within 1-2 weeks prior to migration (if possible)	n/a	
1.2. If Client code can be declared within 1 week, communicate the client code to UBC IT - Collaboration Applications Team (UBC IT - CA)	Client code defined for each migration group. These groups will be eligible for generic accounts, resource mailboxes, equipment mailboxes, increase quota, etc.	n/a	Initiate talks with own department, and inform UBC IT of results	n/a	
1.3. If no Client code can be declared within 1 week, UBC IT - CA will use the "GNRL" (general) client code.	Client code "GNRL" will be used for the migration. These users will need to be sorted into their proper IAM groupings after the migration. At this point, GNRL groups will be ineligible for generic accounts, resource mailboxes, equipment mailboxes, increase quota, etc.	n/a	n/a (Client code not defined within time frame)	n/a	



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2. Pre-provisioning					
2.1. UBC IT - CA provides Client IT Administrator a list of end users that can be pre-provisioned. The number of pre-provisioned accounts per time interval will be discussed between the CSM and the Client IT Administrator.	Client IT Administrators are provided with a list of their FASmail enabled users, and when each set of them will be ready to be migrated.	n/a	Determine migration dates (start/end) 2 weeks prior to migration	CSM to initiate contact with Client IT and provide list. CSM to update FAS Migration calendar	
2.2. Reconcile list of end users where discrepancies have been identified.	Client IT Administrators to identify which end users identified as requiring further investigation are valid		Complete reconciliation 1 week prior to migration	CSM to initiate contact with Client IT and provide list	
2.3. If client code is defined: Pre-provision user in EAD and FASmail in their respective IAM groups. If client code not defined: Pre-provision users in EAD and FASmail will be placed into the "TMP-ICHG" group.	EAD accounts will be provisioned. FASmail accounts provisioned. Users will all be in their proper IAM grouping or the TMP-ICHG grouping respectively.	n/a	n/a	Perform accounts setup via backend script(2-5 days prior to migration)	
2.4. Establish start date and end date for users to complete their email client reconfiguration. Reminder that all FASmail client reconfiguration steps must be done during one session.	User understands what needs to be done, and will migrate within given time frame.	User understands expectations	Initiate talk with user	n/a	



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<p>2.5. If local admin exists: CSMs and local admins will drive start and end dates.</p> <p>If local admins does not exist: CSMs and UBC IT - CA will drive start and end dates.</p>	<p>All IFA5 users accounted for during migration. Keeps FASmail migration plan on time.</p>	<p>n/a</p>	<p>Perform, if local admin exists and willing to assist</p>	<p>Perform, if local admin does not exist or unwilling to assist</p>	
<p>2.6. If users intend to use FASmail on a mobile device which enforce IT Policies (ie. BlackBerry) or use ActiveSync (ie. Apple iPhone, Android, etc), notify them that once FASmail is setup on their device, a passcode must be entered each time the user wants to access the device.</p> <p>Future setup instructions to be placed on the UBC IT website under the unsupported section of FASmail setup documentation for self-help. Important: Mobile devices guides are for reference. They are unsupported by UBC IT.</p>	<p>Inform users that a passcode must be entered each time a user wants to access the device. This passcode is required if they want FASmail on their mobile device.</p>	<p>Understands implications</p>	<p>Inform user of implications</p>	<p>n/a</p>	
<p>2.7. FASmail will not have contacts. This means that all names which are found in the FASmail Global Address List(GAL) points to FASmail accounts.</p> <p>Contacts were used in the past to put non-Exchange email addresses into an Exchange GAL.</p>	<p>Understand that GAL entries can only point to FASmail accounts.</p>	<p>n/a</p>	<p>Understand implications</p>	<p>n/a</p>	



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3. End User Discovery and Preparation					
3.1. Identify generic Interchange email accounts and owners	Information on generic Interchange account information identified	Discovery with Client IT	Discovery with user	n/a	
3.2. Notify UBC IT - CA team of generic Interchange accounts and owners	Allows UBC IT - CA to prioritize generic FASmail account creations and permissions.	n/a	Inform UBC IT 1 week prior to migration	Gathers for future classification and creation.	
3.3. Identify users that may use an email alias such as firstname.lastname@ubc.ca	Allows UBC IT - CA to add the email aliases in preparation for usage of the mailbox.	Discovery with Client IT	Discovery with user	n/a	
3.4. Identify users who have both an Interchange account and an Exchange 2007 account. These users will be migrated at a later date. If Exchange 2007 emails are placed into a FASmail account, replying back to Exchange 2007 emails won't work, and all email contacts won't work. Enabling forwarding from Exchange 2007 to FASmail is an option.	A list of users who have both Interchange and Exchange 2007.	Discovery with Client IT	Discovery with user	n/a	
3.5. Notify UBC IT – CA team of users who have both an Interchange and Exchange 2007 email accounts.	UBC IT – CA will have a list of these users UBC IT – CA will initiate preparations and confirm the Interchange-Exchange2007 to FASMail migration strategy	n/a	Informs UBC IT 7 days prior to 1 st migration	Finalize strategy and procedures for the Int-Ex2007 to FASmail migration	



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<p>3.6. Review and modify the -7 day communication (#2) based on the provided template. Objectives of this communication will:</p> <ul style="list-style-type: none"> • Inform end user of migration dates (start/end) • Ask the end user to determine what mail client they are using along with hyper-links to the migration steps the end user will need to perform. Instructions on determining what email client they have will (may) be provided • End users will receive another communication 1 day prior to their actual migration providing further details. The Client IT / Dept rep is responsible for determine the day to day migration schedule • myUBC users will migrate to the new Outlook Web AppService. Study the Outlook Web App user guide • Provide the end user with their new email format (aliases will not change) • Be aware that you will need to advise your entire list of contacts that you are moving email systems (although your Interchange emails will be forwarded to your FASmail) • Remote email access will be available via Outlook Web App Service with a link to a user guide 	<p>User's initial expectations are set</p>	<p>n/a</p>	<p>Review / revise template as appropriate</p>	<p>Provide template to IT/Dept contact 14 days prior</p>	



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<p>3.7. Send out Communication #2 to end users to prepare for the Interchange to FASmail migration.</p> <p>Notify users that once they have migrated over to FASmail, emails sent to their Interchange address will be forwarded to their FASmail address. However, they will no longer be able to send out from their Interchange email address (to be tested&confirmed).</p>	<p>User's initial expectations are set</p>	<p>n/a</p>	<p>Inform users 7 days prior to 1st migration</p>	<p>n/a</p>	
<p>3.8. End-user follows Communication #2 to a UBC IT webpage which has all the instructions posted online for POPS, IMAPS, OWA. Instruct them to match their client's current email access method.</p> <p>Thunderbird 3 Eudora 7.1 Mac Mail4 Windows Live Mail Outlook Express, 2003, 2007, 2010, 2011 Entourage 2008 for POP/IMAP Entourage 2008 Web Services Edition for POP/IMAP/EWS/Autodiscover</p>	<p>Each user is given migration setup instructions and they understand how it will be used.</p>	<p>Discovery with Client IT</p>	<p>Discovery with user to determine which client they use</p>	<p>n/a</p>	



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<p>3.9. Review and modify the -1 day communication (#3) based on the provided template. The communication objectives are:</p> <ul style="list-style-type: none"> • Confirm date/time migration will occur • Remind end user to confirm their email client and print out appropriate setup instructions • Perform final email send / receive just prior to migration time (not required for myUBC users) • IT will migrate your mailbox to FASMail and set Interchange email forwarding to FASmail • Reset your CWL password on CWL.myAccount • End user to follow email setup instructions • End user to verify migration by sending an email to their old Interchange, new FASMail email ID or Alias and confirm they have received it. If not, contact Client IT/Dept Rep • For myUBC users, log into Outlook Web Access • Inform all your contacts of your new email address using your new FASmail account • Contact your UBC Directory rep to update your email and CWL information in the UBC directory 			<p>Revise template as appropriate 2-5 days prior to 1st migration</p>		
<p>3.10. Send out Communication #3 to end users</p>	<p>Prepare end user</p>		<p>1 day prior to migration</p>		
<p>4. UBC IT - CA backend preparations</p>					



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<p>4.1. UBC IT - CA:</p> <p>Priority 1 (critical for migration)</p> <ul style="list-style-type: none"> a. provision FASmail accounts b. run forwarding script <ul style="list-style-type: none"> - Appends FASmail address to existing list of forwarding addresses - Keep copy on Interchanger server will be disabled <p>Priority 2 (best be done before user migrates)</p> <ul style="list-style-type: none"> c. runIMAPSync script (Interchange emails will be in their FASmail box under a folder called "INT-[old folder name]") <p>Priority 3 (not critical for migration)</p> <ul style="list-style-type: none"> d. runmyUBC export contacts script e. runmyUBC to OWA import contacts scripts 	<p>User's FASmail account is provisioned.</p> <p>All Interchange emails and contacts are imported into FASmail.</p> <p>Forwarding is enabled.</p>	<p>n/a</p>	<p>n/a</p>	<p>Start and finish provisioning process</p>	



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<p>4.2. If generic Interchange accounts and their IAM code is identified, create generic account equivalents in FASmail while following FASmail generic account creation conventions.</p> <p>If generic Interchange account has been identified but their IAM code is not identified, do not create FASmail generic accounts.</p>	<p>Generic FASmail accounts will be created for departments who have properly defined their IAM code during the onset.</p>	<p>n/a</p>	<p>n/a</p>	<p>Start and finish generic account provisioning</p>	



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5. End user email client reconfiguration					
<p>5.1. UBC IT CSM manages end-user migration timing and completion. End user support will come from local admins and UBC IT Service Centre (UBC ITSC).</p> <p>Global Steps:</p> <ol style="list-style-type: none"> If necessary, set Interchange email forwarding on Interchange Manage Your Account Reset CWL password on CWL myAccount Perform Final email send/receive on user's Email client with Interchange still setup Change POP to POP, IMAP to IMAP, myUBC to OWA from Interchange to FASmail respectively Send test email to old Interchange address and confirm arrival in FASmail Send test email from new FASmail email account and confirm arrival in FASmail If alias exists, send test email from <code>firstname.lastname@ubc.ca</code> and confirm arrival in FASmail Advise end users to inform all their email contacts of their new FASmail email address Stop using old Interchange email address 	<p>Forwarding from Interchange to FASmail enabled. Interchange to FASmail, FASmail to FASmail, and alias to FASmail works. Client reconfigured for FASmail. All Interchange emails in FASmail. User's contacts are notified of user's new FASmail account.</p>	<p>Perform</p>	<p>Assist if necessary</p>	<p>Assist if necessary</p>	



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<p>5.2. myUBC Users:</p> <p>Instruct users to use Outlook Web Application (OWA) for FASmail, which replaces myUBC on Interchange. Perform all "Global Steps" expect for Step C.</p>	<p>User uses OWA to access their FASmail, rather than myUBC for their Interchange. User's myUBC email contacts will have been imported into OWA.</p>	Perform	Assist if necessary	Assist if necessary	
<p>5.3. Update end-user's email information in the UBC Directory to the new FASmail account.</p> <p>User should contact their Directory representative. Directory Representatives can be found at: https://www.directory.ubc.ca/index.cfm?page=administrators&view=vancouver (If off campus, VPN is required).</p> <p>Wait 2 hours, and then retest: Send test email to their <code>firstname.lastname@ubc.ca</code> and confirm arrival in FASmail.</p>	<p>Removes dependency of alias going through two email systems</p> <p>Ideal: (Alias -> FASmail)</p> <p>Not as ideal: (Alias -> Interchange -> FASmail)</p>	Perform	Perform	n/a	
<p>5.4. Add end-user's CWL username into the new CWL field of the UBC Directory.</p>	<p>This will help with the preferred name field in FASmail and identifies their firstname.lastname@ubc.ca to a primary CWL</p>	n/a	Perform	n/a	



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<p>5.5. From 3.3, if end users intend to use their firstname.lastname@ubc.ca as their primary email reply back address:</p> <p>Admin notifies FASmail Support and they will add the user's firstname.lastname@ubc.ca as the user's primary SMTP address in the Exchange Management Console.</p>	<p>When recipients respond back to a FASmail user, they will see the FASmail user's UBC alias rather than an @mail.ubc.ca e-mail address.</p>	<p>n/a</p>	<p>Performs</p>	<p>Adds UBC alias as primary SMTP when necessary</p>	



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5.6. If firstname.lastname@ubc.ca is setup as their primary SMTP, then user updates their e-mail client's reply back address from username@mail.ubc.ca to firstname.lastname@ubc.ca	When recipients respond back to a FASmail user, they will see the FASmail user's UBC alias rather than the @mail.ubc.ca e-mail address.	Perform	Assist if necessary	Assist if necessary	
5.7. If local admins requires support: Contact appropriatedistribution lists: fasmail.migrations-[Insert CSM firstname]@ubc.ca (Tier 2 at UBC IT - CA) - Each list will contain their associated CSM and their associated UBC IT – CA Support Analyst If CSMs require support: Contact their assigned UBC IT - CA Support Analyst. If end-user requires support: Contact local admin (Tier 1 at local site) or UBC ITSC via temporary new skillset line (Tier 1 at UBC ITSC)	Tier 1 (local admins, UBC ITSC) and Tier 2 (UBC IT – CA) contacts established.	Initiate contact for assistance if necessary	Assist if necessary	Assist if necessary	
6. Interchange Email Migration Wrap up					
6.1. Discuss a shutdown date for the Interchange accounts in their department.	Sets expectation and establishes a target date to work towards.	n/a	Initiate talk and get agreement with UBC IT	Initial talk and get agreement with Client IT	



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<p>6.2. After the shutdown date for a department, UBC IT - CA runs Interchange disable access script. The actual Interchange account and content will not be removed.</p> <p>a. Run Interchange Disable Script</p>	<p>All Interchange emails that are on the Interchange server will be in their FASmail account. User will only be able to access FASmail via an email client or through OWA.</p>	n/a	n/a	Run script	
7. Support Wrap Up					
<p>7.1. Resolve any outstanding issues or concerns.</p> <p>Inform local admins that assigned UBC IT CSM and UBC IT Support Analyst is no longer available to them for support inquires. All future requests should go through fasmal.support@ubc.ca</p> <p>Users who do not have local admin will be able to direct questions to the UBC ITSC when they take over FASmail Tier 1 support.</p>	<p>FASmail users are migrated. They should use the proper channels for further support.</p>	Initiate contact for assistance if necessary	Perform if necessary	Assist if necessary	

Legend
Performed by Client IT / Departmental Representative