Introduction:

The purpose of the “Unit Pre-migration Assessment Form” is to gather the current state of your department or college unit in preparation for migration to the new University E-mail Service. The new service is powered by Exchange 2010 and delivers an integrated e-mail and calendaring service for faculty and staff.

The Project Team will work with your unit’s IT professional staff to review and confirm the details in your completed assessment. The information gathered will identify your unit’s readiness for migration and be used to formulate a migration plan. Minimum standards and requirements for units migrating to the new service are provided on the E-mail Project web site at http://www.emailproject.osu.edu/migration.php.

Please complete each question with as much detail as possible.

If you have questions about or problems with the form, contact Brady Dodson, Project Manager, Enterprise E-mail Project, by phone at 247-8383 or by e-mail at dodson.44@osu.edu.

* Denotes a required question or field.

*Please list the university group(s) (e.g., unit(s), college(s), department(s), office(s), etc.) this assessment covers:

*Date completed:

*Meeting Attendees:

*Your Unit Migration Lead:

*Your Unit Migration Contact Phone Number:

*Your Ohio State Username (lastname.#):

Questions:

1. Who in your unit is the key point person for each functional area listed below? Please provide the names and contact information for each person. If no one fulfills one of the roles, say “NONE”. If the same person fulfills multiple roles, you may indicate this by stating “Same as...Desktop Support, etc.”

   a. E-mail Server Administrator
      Name:
      Phone:
      Ohio State Username (lastname.#):
b. Department Network Administrator
   Name:
   Phone:
   Ohio State Username (lastname.#):

c. Training Lead (*Contact for assessing your unit’s training needs and planning appropriate activities*)
   Name:
   Phone:
   Ohio State Username (lastname.#):

d. Communications Lead (*Contact for assessing and determining your unit’s communication needs*)
   Name:
   Phone:
   Ohio State Username (lastname.#):

e. Help Desk Support Lead
   Name:
   Phone:
   Ohio State Username (lastname.#):

2. Does your unit(s) use/support mobile devices with your e-mail system(s)? If yes, please list the quantity of each type you support. If you do not use/support mobile devices, please enter 0 in each type listed.
   a. Exchange ActiveSync-compatible (e.g., Windows Mobile, iPhone, Android, etc.):
   b. Blackberry:
   c. Other (please specify):

3. Does your unit(s) allow personally owned devices to connect to your e-mail system(s)?

4. Does your unit(s) have a BlackBerry Enterprise Server?
   a. How many CALs do you have:
   b. Do you allow personal BlackBerrys to connect via BES:
   c. Do your users connect via BIS:
5. Does your unit(s) use any mobile device management product(s) (e.g., Good Technology, AirWatch, etc.)? If yes, please list the product(s) below.

6. Does your unit(s) implement a mobile device policy? If yes, please outline the policy below.

7. Tell us about e-mail system(s) you use:
   a. What e-mail system(s) does your unit(s) use?
   b. Please list the domains that your systems(s) listen for?
   c. What is the daily mail flow?
      i. Inbound:
      ii. Outbound:
      iii. Internal:
   d. Do you have any custom routing connectors? If yes, please explain.
   e. Do you have any routing connectors using SSL/TLS?

8. How much Storage is in use on your e-mail system?

9. Are there any limits or controls on users?
   a. Do you limit the mailbox size?
   b. What is the standard mailbox size provided to each of the following user groups using your system? For any group listed that you do not provide mailboxes, please answer N/A.
      i. Faculty:
      ii. Staff:
      iii. Grad/Professional Students:
      iv. Student Employees:
      v. Sponsored Guests:
      vi. Other (please specify):
   c. Do you accept requests for larger mailbox sizes than the standard sizes listed in the previous question?
   d. Do you chargeback for additional storage?
   e. Are there retention limits (e.g., deleted items, mailbox purge etc.)?
      i. Deleted item retention:
      ii. Current send/receive limits:
      iii. Volume Limit:
      iv. Retention policy (archiving):
      v. Backup:
10. Does your unit(s) auto-append information to outbound e-mail (e.g., disclaimers)?

11. Does your unit(s) use an e-Discovery application?

12. Does your unit(s) utilize e-mail encryption services (e.g., S/MIME, ZixCorp, Tumbleweed, etc.)?

13. Does your unit(s) have any legal or regulatory requirements?

14. Does your unit(s) use any Digital Rights Management (DRM) or Rights Management Services (RMS)?

15. What, if any, applications, clients, or systems connect to your e-mail system(s)?
   a. Calendar:
   b. Area Specific:
   c. Pull mail via POP/IMAP:
   d. SMTP relay:
   e. List Serve:
   f. Other (please specify):

16. What number of total users do you currently support for e-mail and calendaring services? Please provide a number for each customer group served or enter N/A for those you do not.
   a. Faculty:
   b. Staff:
   c. Grad/Professional students:
   d. Student Employees:
   e. Sponsored Guests:

17. Approximately how many resources do you have on your system(s) (e.g., meeting rooms, equipment, shared mailboxes, etc.)?

18. What is the mailbox size for resources on your system(s)?

19. Does your unit(s) use Public Folders?

20. Is there any other relevant information to the migration that you would like to share?