

Agency Readiness Checklist: Preparing for Migration Checklist

<i>Use this checklist to keep track of outstanding tasks that should be completed prior to the move</i>			
	1	Complete Agency Application Integration Readiness Template – Prerequisite	<input type="checkbox"/>
	2	Implement Required Changes for Agency Applications to Coexist with Shared Services Email Offering – Prerequisite T-10	<input type="checkbox"/>
	3	Evaluate Agency Application Integration Readiness Template, and Schedule Review. – Prerequisite if Applicable	<input type="checkbox"/>
	4	Determine if Action Plan for Application Integration is Required. – Prerequisite if Applicable	<input type="checkbox"/>
	5	Calculate Anticipated Bandwidth Requirements Based Upon Email Usage Assumptions – Prerequisite	<input type="checkbox"/>
	6	Validate with the DIS Networking Team that Sufficient Network Bandwidth Exists to Accommodate Additional Traffic Due to the Outlook users– Prerequisite in Coordination with DIS Migration Planning	<input type="checkbox"/>
	7	Procure any Required Network Capacity to Meet Agency Connectivity Needs - Prerequisite	<input type="checkbox"/>
	8	Perform Firewall Updates - Prerequisite	<input type="checkbox"/>
	9	Verify that Both HTTP and RPC Traffic Can Pass Through All Firewalls Between Your Agency and the Exchange Hosted Environment – Prerequisite	<input type="checkbox"/>
	10	Prepare Domain for a Windows 2008 R2 Domain Controller - Prerequisite	<input type="checkbox"/>
	11	Configure IPSec Kerberos Exemption Rule Prior to Domain Controller Introduced into the Exchange 2010 site – Prerequisite	<input type="checkbox"/>
	12	Validate IPSec Connectivity to Your Agency's Other Domain Controllers – Prerequisite	<input type="checkbox"/>
	13	Coordinate with DIS to Schedule when DIS will install a Global Catalog Server for Your Agency's Domain in the Olympia Site – Prerequisite in Coordination with DIS Migration Planning	<input type="checkbox"/>
	14	Verify Inheritable Permissions – Prerequisite	<input type="checkbox"/>
	15	Confirm Agency End User Training Complete for BlackBerry® – Prerequisite	<input type="checkbox"/>
	16	Begin Preparations to Migrate to BlackBerry® Service – Prerequisite (if BlackBerry® Use Required by Agency)	<input type="checkbox"/>
	17	Setup Exchange Administrative Workstation – Prerequisite	<input type="checkbox"/>
	18	Confirm Agency Role Assignments for Delegated Roles – Prerequisite	<input type="checkbox"/>
	19	Send Message to End Users Regarding Mailbox Cleanup – Prerequisite	<input type="checkbox"/>
	20	Confirm Calendar Permissions are Set Properly – Prerequisite	<input type="checkbox"/>
	21	Clean Up Unnecessary Items from Mailboxes – Prerequisite	<input type="checkbox"/>
	22	Review Mailbox Management Policy – Prerequisite	<input type="checkbox"/>
	23	Identify and Document All Delegate Relationships – Prerequisite	<input type="checkbox"/>

	24	Delete Old Mailboxes No Longer in Use – Prerequisite	<input type="checkbox"/>
	25	Identify Disabled Users – Prerequisite	<input type="checkbox"/>
	26	Identify All 2003 Mailboxes – Prerequisite	<input type="checkbox"/>
	27	Identify and Document Users Not Configured to Accept Defaults for Mailbox Size Limits -- Prerequisite	<input type="checkbox"/>
	28	Identify Users Whose Mailboxes Exceed 750 MB in Size – Prerequisite	<input type="checkbox"/>
	29	Remove Spaces From all Distribution Lists (DL) and User Aliases – Prerequisite	<input type="checkbox"/>
	30	Identify all Distribution Groups and Ensure They are Configured with a Universal Scope (Universal Group Type) – Prerequisite	<input type="checkbox"/>
	31	Remove ExpansionServer from all DLs – Prerequisite	<input type="checkbox"/>
	32	Implement Outlook Best Practices – Best Practice	<input type="checkbox"/>
	33	Implement Cached Mode – Prerequisite	<input type="checkbox"/>
	34	Configure to Connect to Exchange Over HTTPS by Default – Prerequisite	<input type="checkbox"/>
	35	Complete an Agency Deployment Wave List – Prerequisite	<input type="checkbox"/>
	36	Evaluate and Remove Public Folders where Possible – Prerequisite	<input type="checkbox"/>
	37	Confirm Public Folder Permissions are Correct for Agency Requirements – Prerequisite	<input type="checkbox"/>
	38	Confirm That Mail-Enabled Public Folders Following Naming Standards for Display Name Attribute – Prerequisite	<input type="checkbox"/>
	39	Replicate Required Public Folders 30 Days Prior to Migration to New Public Folder Implementation – Prerequisite in Coordination with DIS Migration Planning	<input type="checkbox"/>
	40	Prepare Request for Switch Over MX Records Prior to Migrating Users– Prerequisite in Coordination with DIS Migration Planning	<input type="checkbox"/>
	41	Review Policies for Validity with DIS – Prerequisite in Coordination with DIS Migration Planning	<input type="checkbox"/>
	42	Configure IronPort for Agency Migration – Prerequisite	<input type="checkbox"/>
	43	Create Universal Security Group and Test Mailbox – Prerequisite	<input type="checkbox"/>
	44	Test Mailflow – Prerequisite in Coordination with DIS Migration Planning	<input type="checkbox"/>
	45	Test Policies – Prerequisite in Coordination with DIS Migration Planning	<input type="checkbox"/>
	46	Agency Notification – Best Practice	<input type="checkbox"/>
	47	End User Training for Filtering, Junkmail and Quarantine – Best Practice	<input type="checkbox"/>
	48	Switch Over MX Records Prior to Migrating Users– Prerequisite in Coordination with DIS Migration Planning - Prerequisite	<input type="checkbox"/>
	49	Confirm all Agency Users are Upgraded to Required Outlook Version – Prerequisite	<input type="checkbox"/>
	50	Verify DNS Suffix Search – Prerequisite	<input type="checkbox"/>

	51	Configure Internet Explorer for OWA Access - Prerequisite	<input type="checkbox"/>
	52	Confirm Agency End User Training Complete for OWA – Prerequisite	<input type="checkbox"/>
	53	Confirm Agency Help Desk/Service Desk Readiness With Updated Procedures to Take Agency Calls – Prerequisite	<input type="checkbox"/>
	54	Coordination Complete Between Agency Help Desk and DIS Service Desk in Preparation for Agency Calls – Prerequisite in Coordination with DIS Migration Planning	<input type="checkbox"/>
	55	Confirm Agency Training for Delegated Roles -- Prerequisite in Coordination with DIS Migration Planning	<input type="checkbox"/>
	56	Provide Agency Customer Contact Information to Complete SLA and Sign prior to Migration – Prerequisite	<input type="checkbox"/>
	57	Confirm Agency Has Completed the Records Retention Policies and the Vault Session – Prerequisite	<input type="checkbox"/>

Signature

Date

Print Name & Title

Agency Name