## Assessment | Decision-making | Batching and scheduling assistance | Communication

Refresh Insight Messaging is a software solution specifically designed to accelerate the preparation and the execution of a messaging evolution project to Microsoft Office 365 and Exchange 2016. It **assess** the messaging system to drive the **remediation**, support **decision-making** and allows **the development of a migration strategy as well as assistance for automatic batching**, and this during an entire messaging migration project. The software takes into account the different impacts of data migration on the network, the eligibility of workstations for new services, geographical and organizational distribution of mailboxes and desktops, external constraints such as helpdesk capacity to assist users during the migration phases. Providing also bulk **communication** features, Refresh Insight Messaging is a companion for your technical migration tool or the Microsoft FastTrack Center offer.

To define a clear strategy and ensure reliable batching before and during the migration project, **Refresh Insight Messaging** collects the data from the information system, necessary to make reliable decisions. Data are continuously updated and aggregated within one single repository of information. The data taken into account includes:

- Volume and number of items of each mailbox to be migrated : Mails, Calendars, Contacts, Tasks
- Rights and delegations between mailboxes
- For Lotus Domino, the number of encrypted items
- Consistency and validation of source and target directory entries
- Current eligibility of workstations to the new messaging service, with an Outlook client or via OWA
- Capacities of workstations to evolve to an Outlook Client or via OWA
- Organizational data such as localization of users and mailboxes, user category (VIP, Assistant…)…
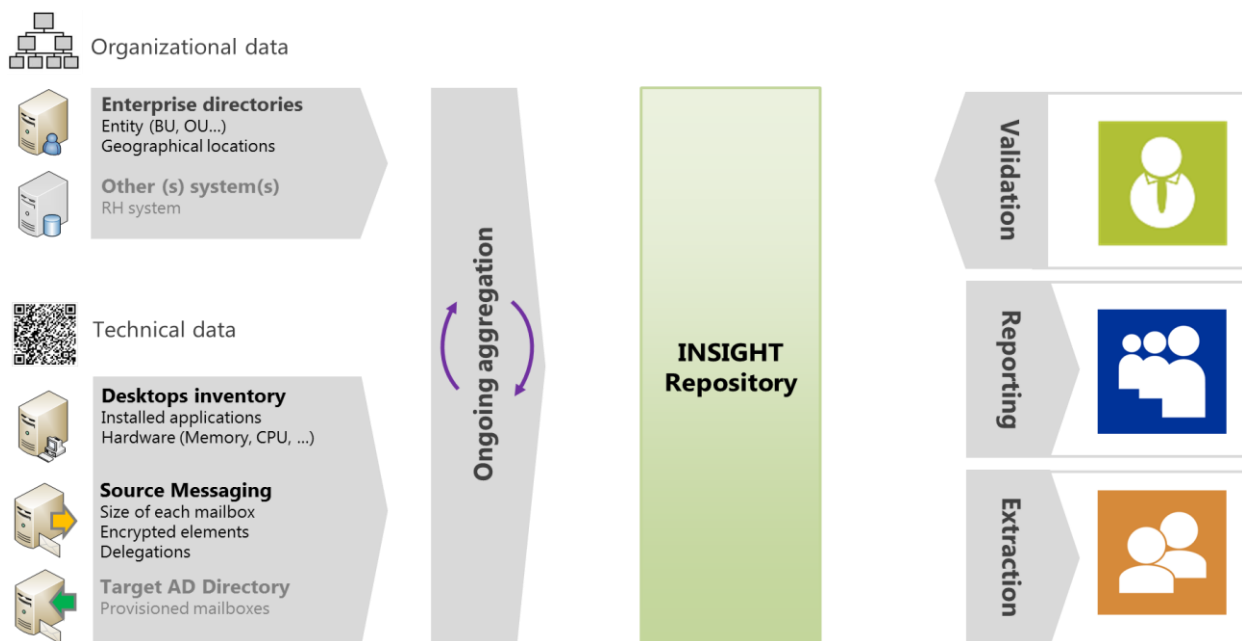
All relevant data to perform batching are continuously updated

Refresh Insight Messaging also allows the modeling of network infrastructure and takes into account the constraints linked to the project: helpdesk, maximum number of migrations per day, maximum number of migrations per day for assistants and VIPs.

Based on the collected data and the project constraints, **Refresh Insight Messaging** provides advanced features in order to:

- Choose the appropriate messaging clients to be deployed : Outlook Web Access, Outlook 2010, 2013, 2016...
- Check the workstation eligibility to the new messaging service and identify the components to deploy (SPs, KBs...)
- Determine the migration scenarios : Migration of all the mailbox content, only contacts and calendars, the last months of mail...
- Define the operational deployment strategy precisely and optimized to the company's context : in which site to start the migration, how to link the migration to the change management activity...
- Define the migration infrastructure
- Produce optimized migration batches according to the strategy

Refresh Insight Messaging is a quick-to-implement solution, scalable, covering the needs of medium sized companies as well as large accounts.
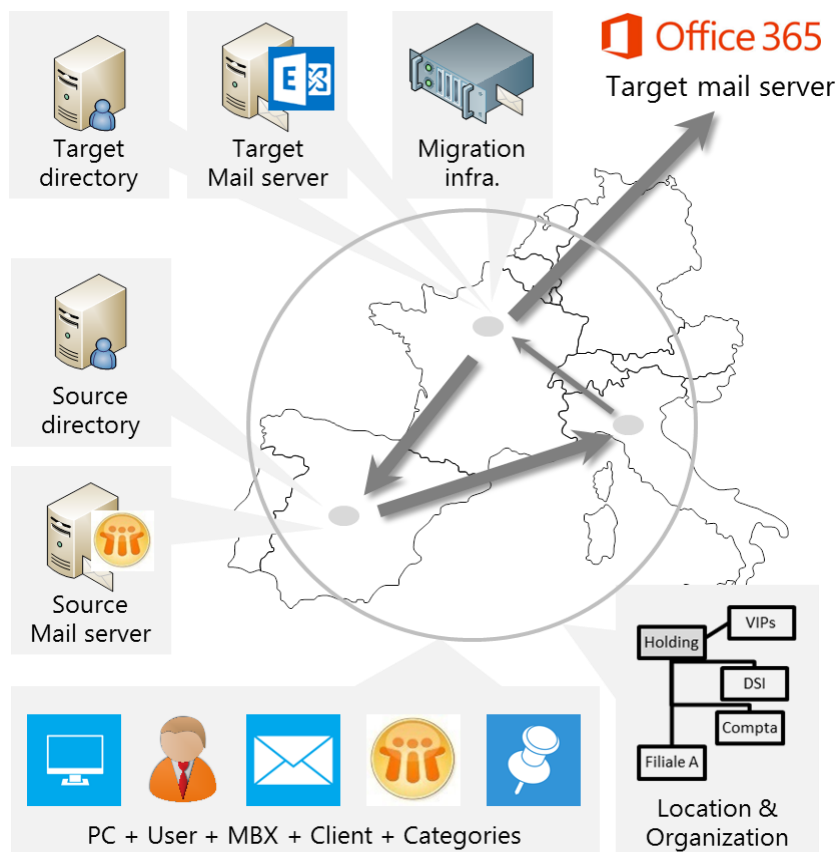
Overview of data sources taken into account in the Insight repository

RM reference version: 2017 R3
Refresh Transporter To Exchange reference version: 3.2
Refresh Transporter For Domino reference version: 5.1

● Available feature
○ Unavailable feature
◐ Partial feature
◖ Available feature under conditions

☁ Specific Office 365
▧ Specific On-Premise

Features	Details / Conditions	Insight
General information		
Web application for centralized management of the messaging migration		●
Extensible multilingual interface	French and English by default	●
Information system connectors		●
Workstation treatment	Agent supports Windows XP to Windows 10	●
Content analysis of mailboxes for decision support	Size between 2 markers (dates or number of months), items number, delegations, Domino encrypted items	●
Management of batch migrated by the FastTrack Center		●
Scalability of the application	Horizontal and vertical / Servers migration and front-end Web	●
Repository - Automatic data aggregation from the IS		
Administration of aggregation		
Periodic aggregation of collected data	Configurable intervals	●
Multi-source directory and messaging data aggregation	With a secured proxy application	●
File import	Excel or CSV	●
Synchronization from an SQL Server or custom source		●
Step and status of each mailbox		●
Detailed visibility by mailbox / workstation		●
Source mail servers		
Analysis of Domino source mailboxes	Volume and number of items / Delegations / Number of encrypted items	●
Usage analysis of the Domino resource calendars	Who use the resource (organizers)	●
Eligibility of Domino resources to migration	Based on organizer's migration status	●
Analysis of Exchange / O365 source mailboxes	Volume and number of items / Delegations	●
Analysis of Google source mailboxes	Volume and number of items / Delegations	●
Analysis of Zimbra / IMAP source mailboxes	Volume and number of items	●
Configuration of analysed data	Volume and number of items (Mails, Calendar, Tasks, Contacts) cumulated for 5 different migration strategies and customizable. By default: - The whole mailbox content - Calendar + tasks + contacts (No mails) - 1 months of mail + calendar + tasks + contacts - 3 months of mail + calendar + tasks + contacts - 12 months of mail + calendar + tasks + contacts	●
Sources and targets messaging directories		
Duplicated items detection		●
Analysis of source directory entries	Check of value formats and object types	●
Analysis of target directory entries	Check of value formats and object types	●
Causes of ineligibility of directory entries	Ex: Incorrect mail field format - Fields mailServer - mailFile not filled (Only for Domino messaging) - DisplayName, sn, givenName format not compliant with Dirsync (for O365 target) - Invalid proxyAddresses format - userPrincipalName not in a mail address format (for O365 target)	●
Workstations		
Global analysis of workstations	Agent compatible from Windows XP to Windows 10	●
Detection of couple User - Workstation	Based on the inventory module integrated to the solution	●
Type of default email client	Outlook / Notes / Other	●
Installation status of Outlook 2010, 2013 and 2016	Installed / Not Installed	●
Eligibility status for OWA usage (Outlook Web Access) and Outlook client	Eligible / Non-Eligible / Unknown	●
Causes of ineligibility to use OWA	Outdated browser / Browser missing / OS outdated (SP) / Operating System obsolete	●
Causes of ineligibility to use Outlook 2010, 2013 and 2016	Outlook outdated (KB) / Outlook outdated (SP) / Outlook missing or obsolete / OS outdated (KB) / Operating System outdated (SP) / Operating system obsolete	●
Eligibility status to install Outlook 2010, 2013 and 2016	Eligible / Non-Eligible / Unknown	●

Feature	Description	
Causes of ineligibility to install Outlook 2010, 2013 and 2016	Insufficient disk space / Browser unsupported / Outdated or unsupported operating system (SP) / Obsolete hardware / NET Framework	●
Detection of PST archives mounted into the Outlook profile	Number and total volume of PST archives	●
Available Disk Space	On drive C :	●
Configuration, Assistance to the definition of the migration and batching strategy		
Configuration		
Description of geographic locations and organization		●
User categories	VIP / Assistant / … (For differentiation of migration strategies or processes)	●
Mailbox Type	Users / Shared / Resources / …	●
Custom fields in the repository	To be defined in the repository (Name, expected data type)	●
Messaging type	Domino / Exchange / Google / Zimbra / IMAP…	●
Mass change of entries in the repository		●
Using the definition of migration strategies		
Definition of subsets	A subset represents a part of the entire content of the repository, It is defined using filters applied to the data available in the repository by combining AND / OR operators. The filters can be nested. Ex : All of the mailboxes in London for which the workstations are eligible to Outlook 2013	●
Migration path	Path between a group of messaging source servers and a group of messaging target servers passing through the migration platform. It is defined by its name, its description, the minimum bandwidth to which it is constrained (lowest network link on the way) and the number of migration stations associated for each type or source messaging system.	●
Choose messaging client to be deploy to the target	Summary reports presenting the data related to the audit of the installed base (Messaging Client used by default, Eligibility to OWA, Outlook 2010 & 2013…).	●
Determine migration scenarios	Definition of 5 different migration strategies Assignment of one of the 5 strategies to each mailbox Reports	●
Size the infrastructure migration	Evaluating an optimal number of migration server according to the constraints networks	●
Batching assistance		
Batching constraints	Maximum number of mailbox per batch	●
Location quotas	Maximum number of mailboxes for each location	●
Custom quotas per location	Up to 5 additional quotas based on your own criterias for each location	●
Migration calendar per location	Start/End dates for the location Closed days	●
Setting links between mailboxes	Takes into account as a batching constraint	●
Map of delegations between mailboxes and consideration for batching	Viewing and editing delegations to consider for batching	●
Batching automation	Takes into account batching, as well as network and infrastructure constraints	●
Batching optimization	Indicators on batch filling	●
Scheduling of the batches	Selection of the date according to the constraints and the migration calendar	●
Viewing the forecast planning of migration		●
Export batches	CSV Format: Data associated to each configurable mailbox to export	●
Deployment features		
Operation ordering		
Order migration batches	Asynchronous treatment	●
Undated orders	Quotas locations and opening planning --> automatic scheduling	●
Control compliance check when ordering	Export errors on rejected orders	●
Custom fields in the workflow to add project-specific information	Necessary information for the technical migration, the communication process or the reporting (can be derived from the repository)	●
Tracking operations of migration		
Deployment calendar	List of required actions for the deployer	●
Centralized management console but also shareable with the client / third-party	Web application	●
Visibility of operations based on user-role and geographic location		●
Multi-criteria filters on migration operations	By operation set, by mail address, by location, …	●
Monitoring of batch operations		●
Scenarios and operations sheets	Details and publishing information related to the operation (MBX, actors, workstation, …)	●
Access to the data of completed and archived operations		●
Access to a solution's document in case of known errors		●
Actions on migration operations		
Stop, put in trash or deletion of an operation		●
Traceability of interventions on an operation		●
Rescheduling migration	Choosing whether or not to inform the various actors by email	●
Choice of available dates for the rescheduling according to the capacity planning	Quotas by locations and types of operations	●
Changing information related to a migration in progress		●
Mass action on a set of operations in progress	Sending mail, rescheduling, deletion, communication plan update, …	●
Features of change management		

Feature	Description	
Bulk email sending	Grouped or customized mailings. Sending service compliant with the throttling policies on your SMTP relay.	●
User survey module	Questionnaire before or after migration	●
Communication plan design	Dedicated role giving the right to edit communication plans	●
Import/Export of communication plans	For off-line edition	●
Insertion of dynamic information (related to the current operation) in the communication	Assistance module for adding dynamic informations	●
Word addin to edit the content of communication plans		●
Email communication in the language of the user		●
Communication adapted to the process and the user	Choosing a specific communication plan when ordering operation	●
Tracking sheet for interactive communication with the end-user	Data validation, rescheduling, validation of delegations to migration, history of actions, …	●
Validation of the migration date by the end-user	Can be enabled for some or all users	●
Choice of the migration date by the end-user	Can be enabled for some or all users	●
Language change by the user	Can be enabled for some or all users	●
Validation of delegations to migrate	The user selects among his delegates which ones to migrate to the target mailbox. Can be enabled for some or all users	●
Reporting features		
Date and time scheduled and actual for each step of the process		●
Migration statistics	Success rate, duration, interventions, …	●
Survey results		●
Operation state report	Forecast and operational	●
Monthly report on migration counters		●
MBX metrics report (Size, number of items, …)	Target and sources PST, Exchange, Office 365, Google, Domino, Zimbra, IMAP	●
Achievement report by project / types of operations / locations		●
Report on migrated items		●
Report on eligibility to the differents migration process	Based on the migration repository	●
Report on messaging diagnosis		●
Report on migration strategies		●
Report on the sizing of the migration platform		●
Report of simulation of migration batches		●
Access to on-demand reports		●
Subscription system to reports		●
Administration		
Application configuration		
Global settings management		●
Management of user roles		●
Languages management		●
Translations of the application		●
Users management		●
Capacity planning	To specify daily quotas depending on the location and the type of operation	●
Management of errors auto retries	Self-recovery on errors encountered in the migration workflow	●
Solutions documents management		●
Causes of interventions management		●
Migration configuration		
Management of communication plans		●
Management of locations		●
Management of survey questionnaires		●
Management of mailbox classes	Characterization of MBX (eg licensing plan …)	●
Management of user categories (VIP, Assistant, …)		●
Management of multiple projects	Multi-project option	◐
Management of custom attributes	On the type of operation, IS, project, MBX	●
Information systems configuration		
Domain management	Messaging, accounts, NT/office domains	●
Directories management	Sources and targets, ports, LDAP access accounts	●
Management of subsidiaries or entities	Interface with directories, inventory and distribution tools	●
Management of migration paths	Characteristics of migration servers, associated network and migration organizational contrains	●
Synchronization of directory entries (mailing lists, user accounts, contacts, groups, resources) from the source to the target	Companion application named Refresh LDAPSync Any LDAP sources, AD/Exchange/Office365 targets	◐