

Email Replacement Project

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Topics

- Why Replace the Current System?
- In Scope – Out of Scope
- Structure of Project
- Technical Infrastructure
- Automated Data Migration
- User Perspective: Who, what, when, how
- What we Learned
- Future Possibilities

High-level overview

SFU's implementation of new email/
calendaring technology

Why we replaced the current system

Problems:

- Very outdated Webmail, Calendaring components
- Limited mobile syncing options
- Loss of control of our major communications asset (increased email forwarding to “better” systems, mostly US based)
- Technical challenges

Technology selected:

- Zimbra Collaboration Suite (parent company Yahoo)

How we selected Zimbra

How

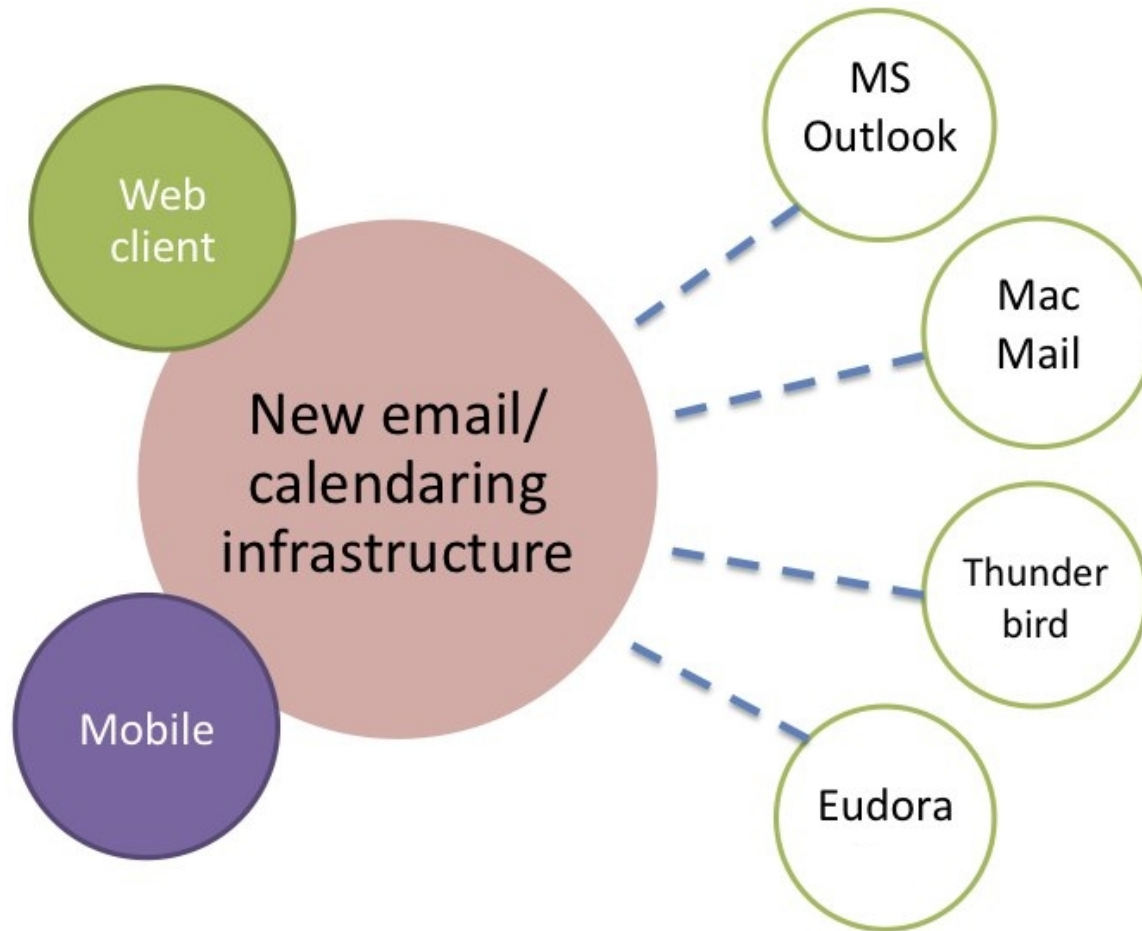
- Discovery (conferences, trade shows, literature, selection processes at other universities)
- Test instances for technical evaluation
- Pilot project for functional evaluation

Why we selected Zimbra


Why

- Solved the major problems
- Restored leading edge experience & met expectations (reputation factor)
- Favourable cost
- Fit with existing technical infrastructure, scalability
- Rate of adoption elsewhere – thriving Higher Ed user community
- Future potential

Scope – Replaced coloured components



Scope – Details

- Moved 50,000 email accounts to new system
- Moved 1300 Corporate Time calendar accounts
- Trained the support staff & end users
- Branded the new system **SFU** **connect**
- Scaled the infrastructure & support to handle fully loaded conditions
- Retired the old Calendaring system
- Still to do - Retire the old Email system

Out of Scope - What we did not do

Require desktop email clients to be retired

- Selectively, people continue to use clients with the new system.

Full Disaster Recovery
(uninterrupted
business continuity)

- Very costly. Separate IT initiatives are working towards DR as funding permits.

Alumni email service
(@alumni.sfu.ca)

- Still to be addressed; considering new options.

Structure of Project

Oversight:

- Steering Committee, Project Director, Project Manager

IT Services core team:

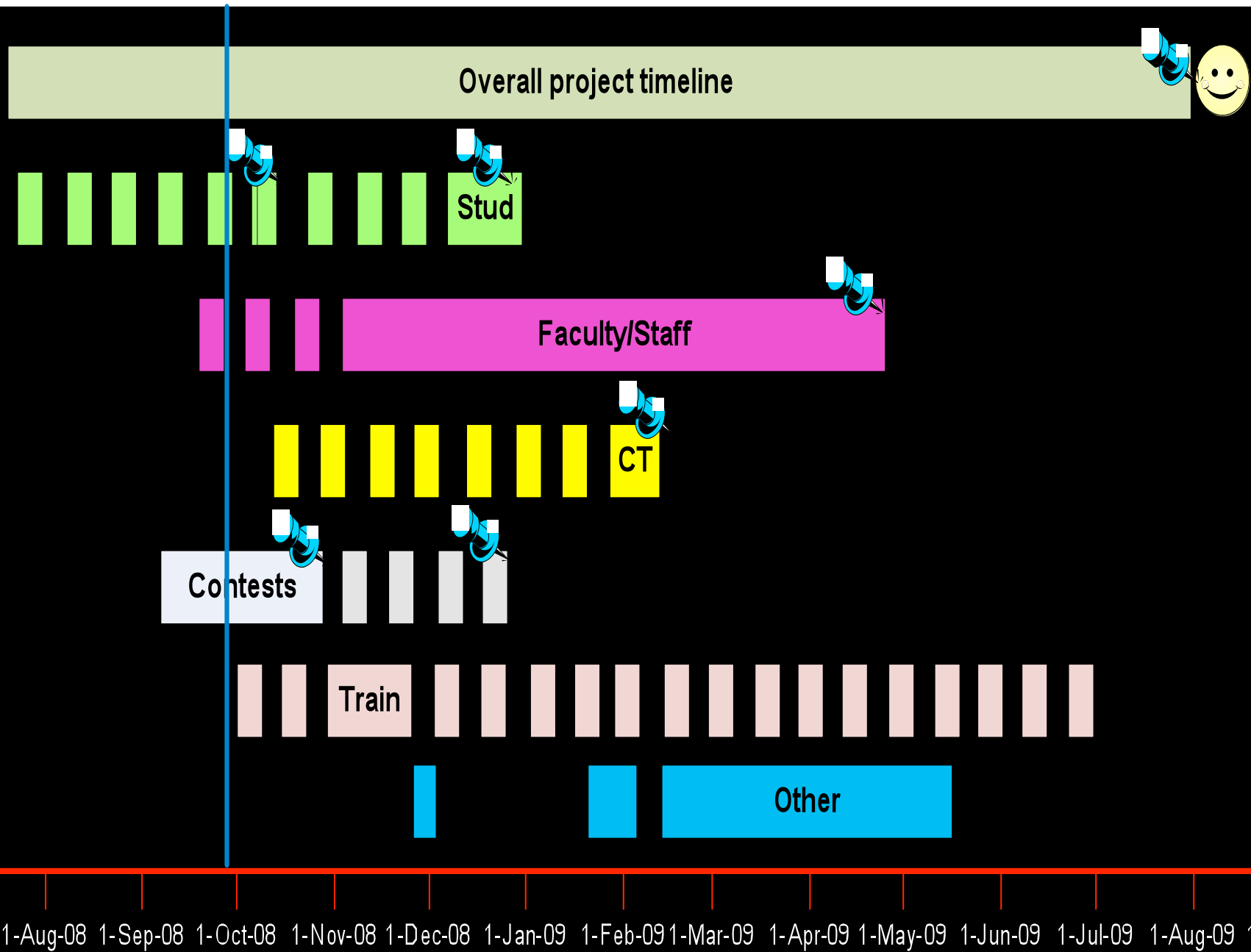
- Technical infrastructure
- Data migration
- Voluntary signup procedures
- Mass moves of students, calendaring users, all remaining accounts at end

Departmental computer support staff:

- Coordinating Faculty/Staff moves, providing support

TechHelp service for students:

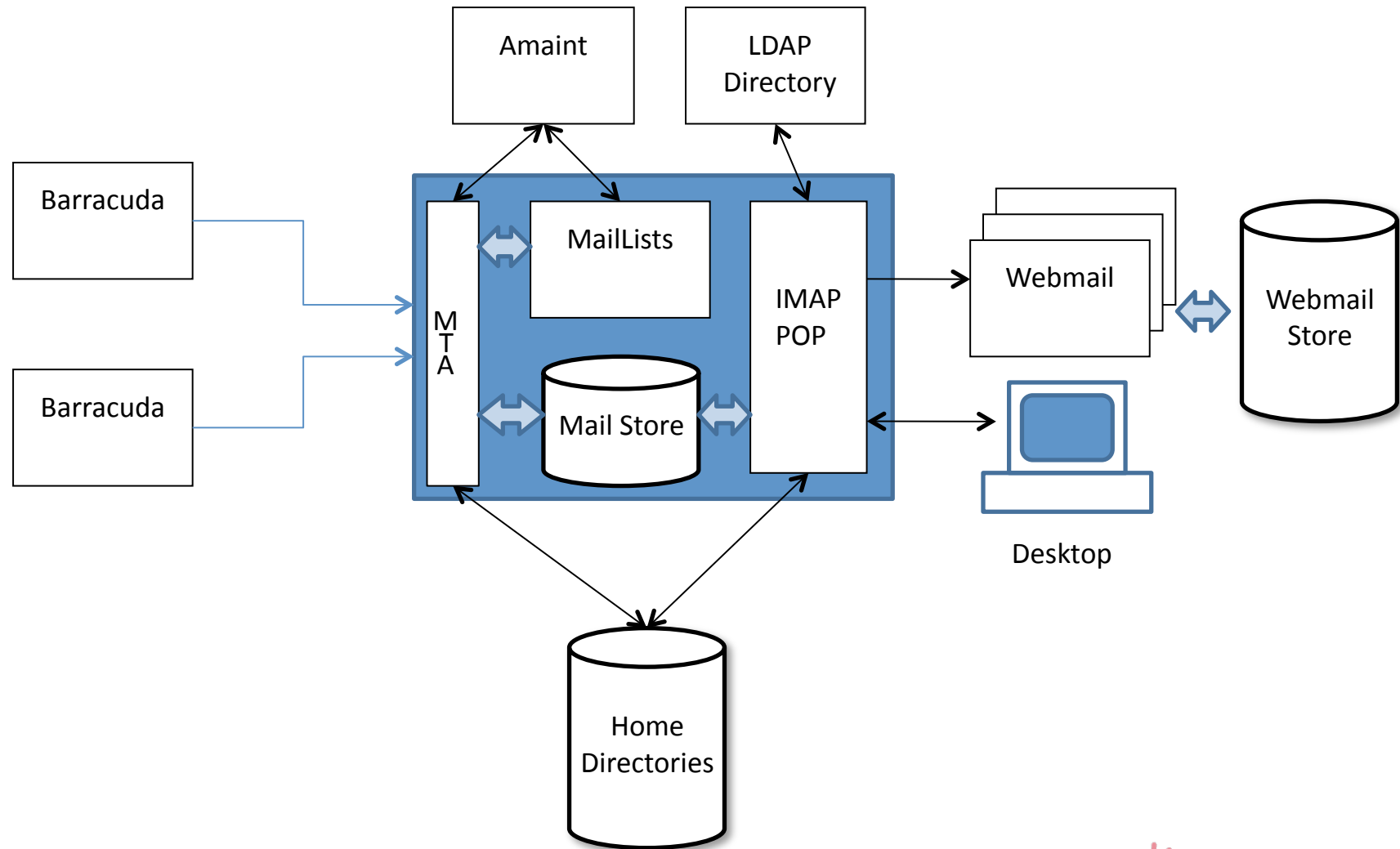
- Providing student support



Technical perspective

SFU's implementation of new email/
calendaring technology

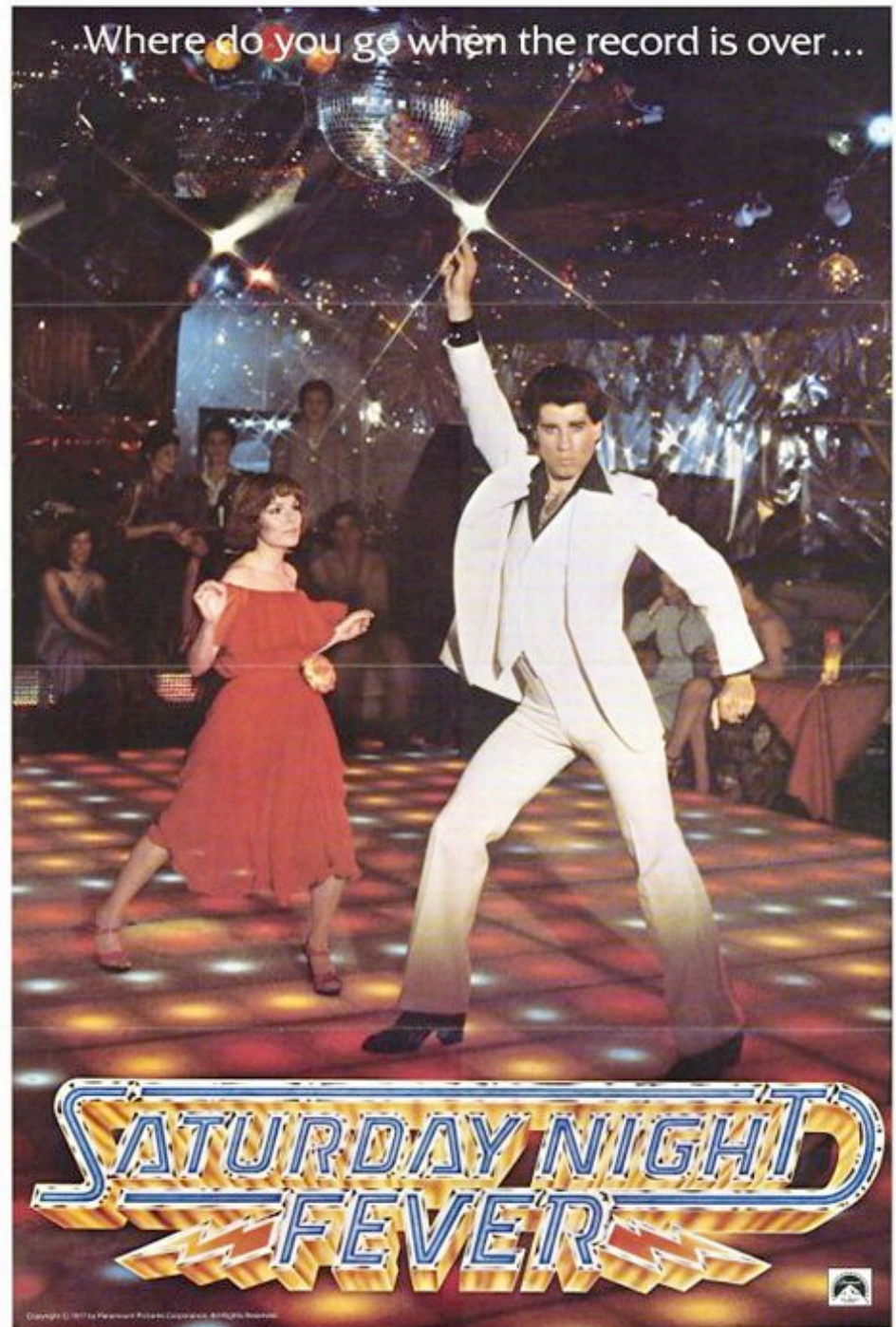
Legacy Architecture



Single server - vulnerable to system failure – expensive to replace



Several dated
components



Our Email infrastructure was fully understood by one person – me



Technical Objectives

Fault tolerant

Easily expandable to support greater capacity

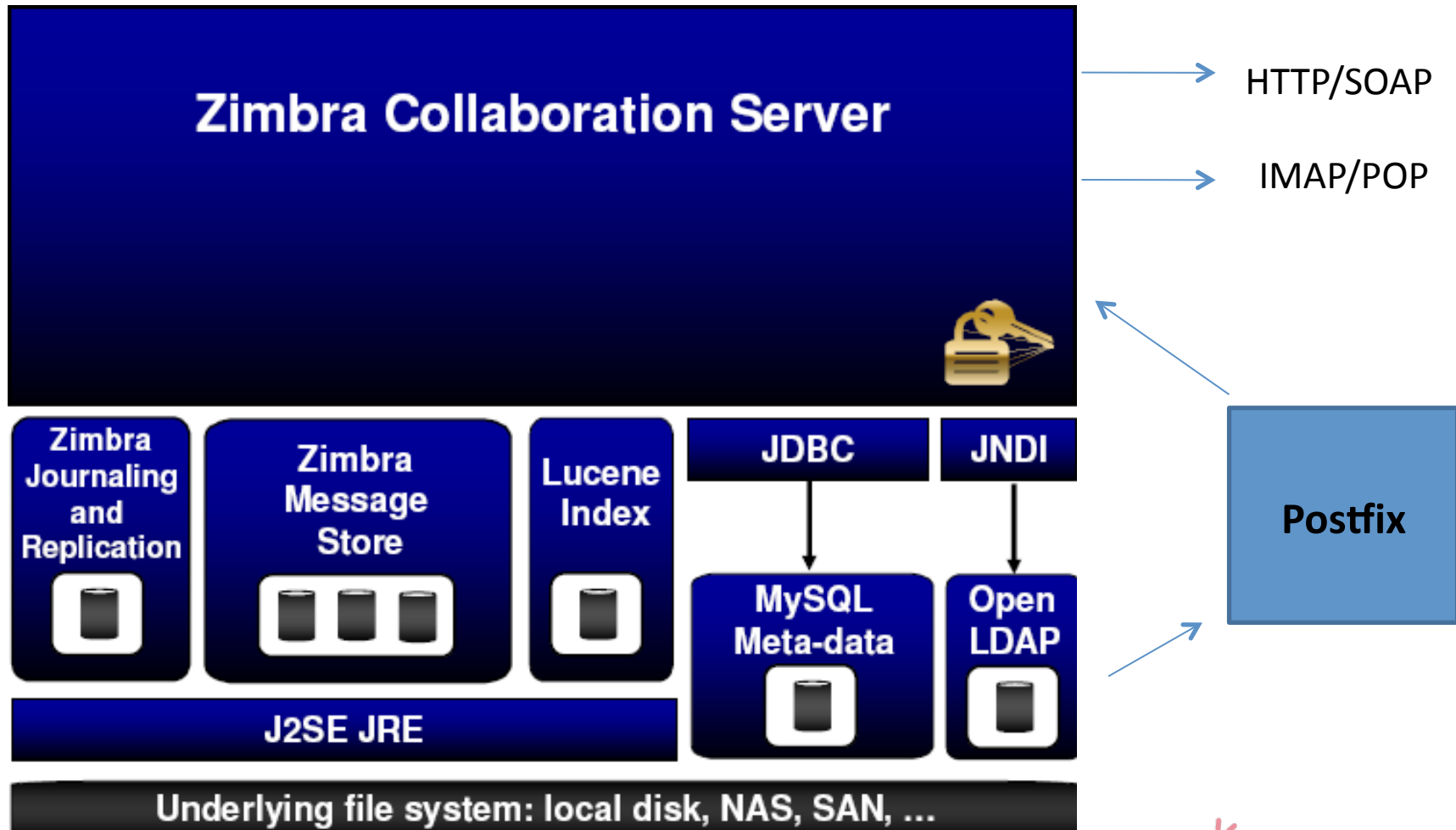
Web-centric, with integrated Calendaring

Mobile Support

Minimal loss of existing functionality (excellent maillist support, solid POP/IMAP/SMTP, anti-spam)

Open Source but supported

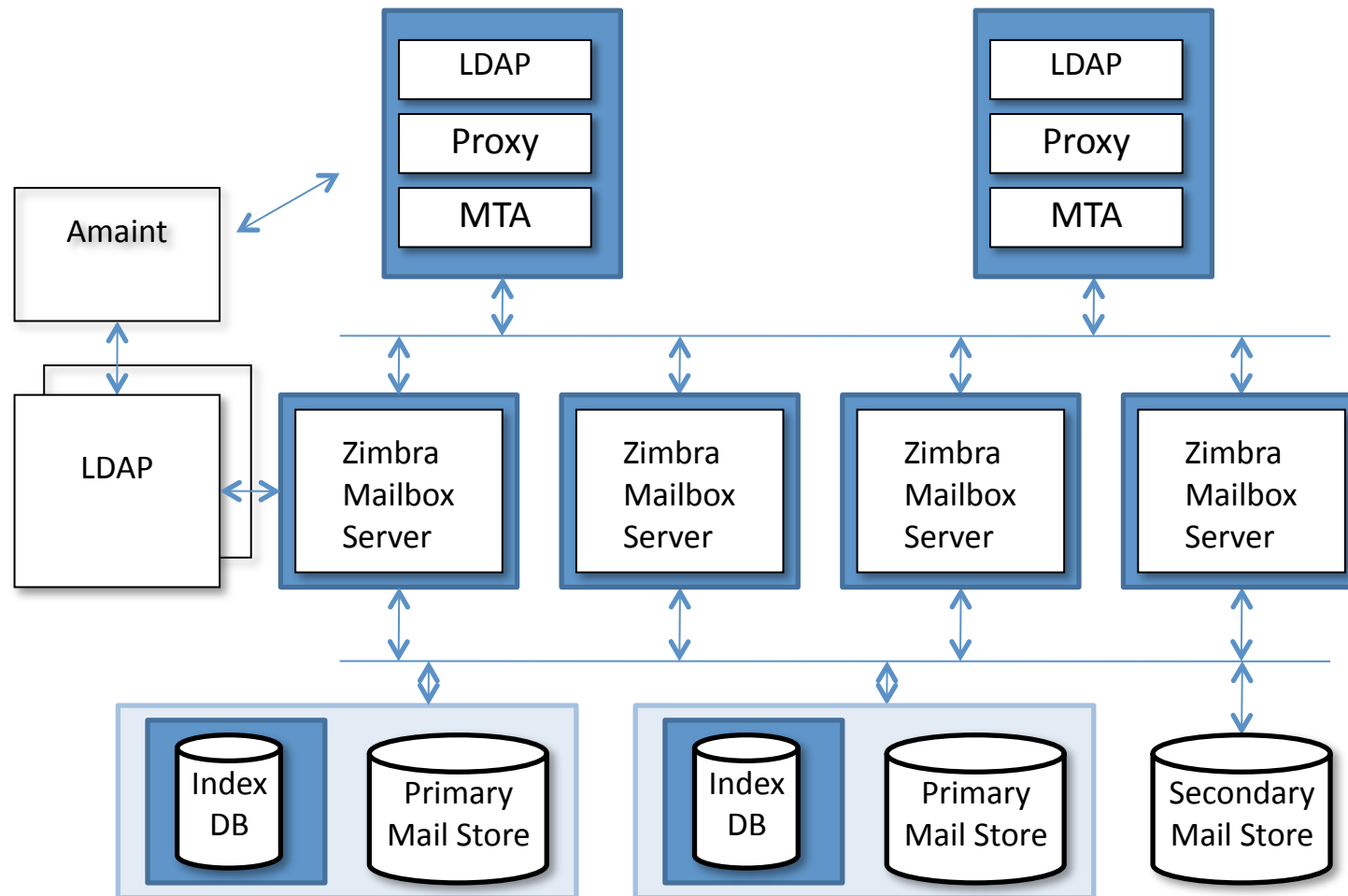
Zimbra Server Architecture



Smtptserver



Zimbra Multi-Server Architecture



Developed Automated Migration Scripts

Web Forms for self-signup

Automated migration
process for legacy
Webmail data

User-triggerable migration
of desktop Eudora/Mac
Mail/Thunderbird data

End-user perspective

SFU's implementation of new email/
calendaring technology

Who: Stakeholders

Computer
support staff

Staff

Faculty

Students

Retirees

Others

What: New technology

Before introduction of SFU Connect:

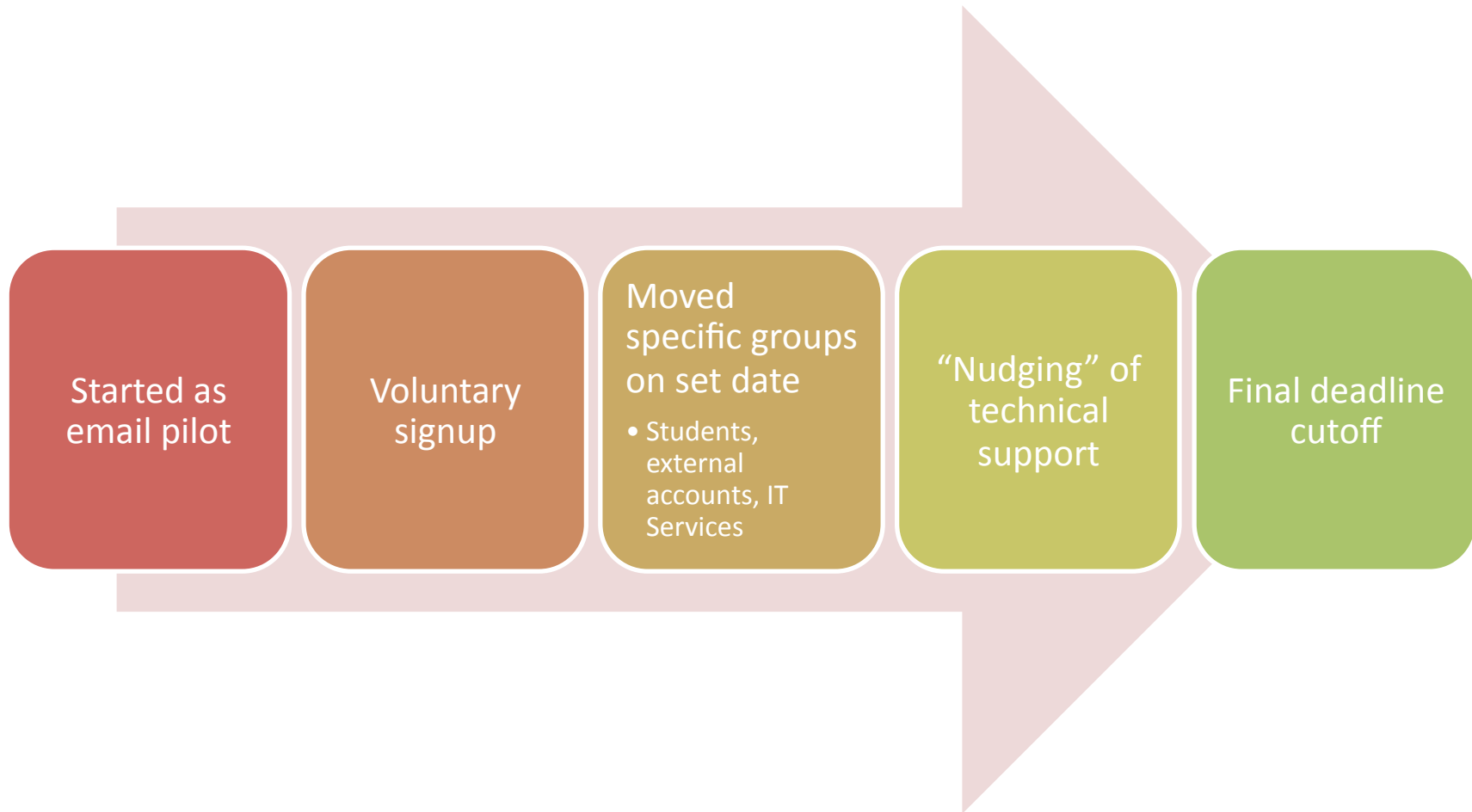
- Dated SFUwebmail system
- POP / IMAP desktop clients
- Forwarding to other web clients
- No integrated calendar system

New technology

- New advanced web client: collaborative suite of tools
- Single calendar system at SFU

When?

1 year implementation timeline



How: Obtaining buy-in

Involved stakeholders in the evaluation process

- Pilot, feedback survey, presentations to departmental technical support

Community involvement through contests

- Naming contest, logo contest

Training support “safety net”

- Provided regular schedule of free drop-in training sessions (end-users)
- Help & resources website (separate technical & end-user sites)

Marketing:

- Own website, SFU websites, mass email messages, Information monitors, posters, handouts
- Self sign-up process helped reach high awareness in short time

How: Voluntary student signup

Encouraged students to sign themselves up and have their data migrated

- Migrations occurred at midnight
- Last message to old system & first welcome message to new system ensured people didn't get lost
- Advertized via posters, handouts, TV screens, online
- About 25% signed up
- New system became well known before the student mass move at Xmas

How: Engaging departmental computer support staff

Spent a great deal of time on communication:

- Monthly information meetings
- Introductory and advanced demos
- Technical wiki
- Regular information and status reports via Email
- Appreciation event planned, sponsored by project Steering Committee

How: Voluntary staff / faculty signup

Gave departmental support staff control of signing up their faculty and staff

- Many approached it in a very systematic way
- Others were more reactive
- Gradually started hearing from support staff that they had reached the limits of their influence
- Moved into direct marketing mode, with emails to end users, presentation to Deans/VPs

How/When: Moving calendaring users

Moved all users at once, on (Feb) Friday 13th!

Concentrated attention in sensitive business offices

Support

- Produced “Differences” and “Best practices” doc’n ; pre- and post-migration training sessions
- Support staff on high alert, concentrated attention “on the floor” after cutover
- Daily debriefing sessions with core team

Emergency performance tweaks

- Made emergency technical performance improvements the week after cutover

Lessons Learned

It helps to have a product
that sells itself

Give sensitive business
offices maximum attention,
but don't assume entire
user base has same
requirements

Buy-in of departmental
level computer support
staff crucial

Selectively allowing faculty/
staff to keep favourite email
clients reduced resistance
to change and increased
“faculty reassuring faculty”

Fine tuning your
infrastructure “as you go” is
suitable for thrill seekers
only!

Future Possibilities

Authenticated Instant
Messaging (Chat)

Document sharing

File storage

Best practices for
mobile syncing &
calendaring, including
shared calendars

“Zimlets” for Alerts,
Tips and Tricks,
Course Resources

Potential to be major
online hub for SFU