

# FermiMail Calendaring: Room Leaders Outreach



**CALENDAR MIGRATION OVERVIEW  
ROOM DATA REVIEW**

**FEBRUARY 29 AND MARCH 2, 2012**

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(Updated slide 13 on March 7, 2012)**

# Meeting Agenda



## ➤ **Calendar Migration Overview – 35 min**

- Calendar Functionality in Brief
- Timeline for Migration
- Room Calendar Migration
- User Calendar Migration

## ➤ **Room Data Review – 25 min**

- Room Admin “Groups”
- Room Name and Other Properties
- Room Workflow Config
- Room Migrator List

# Calendar Migration Overview



**FERMIMAIL CALENDAR MIGRATION:  
WHAT, WHEN, HOW/WHO**

# FermiMail Calendar Functionality in Brief



- **Integral part of FermiMail service**
  - Anyone with a FermiMail email mailbox also has calendaring service.
  - Anyone with a FermiMail email mailbox can access public calendars.
- **Calendaring-specific clients are no longer required.**
  - Outlook 2010 on Windows, Outlook 2011 on Mac
  - Full Featured WebMail Calendaring across Fermilab-supported Desktop OS's.
  - Delegation mechanism the same for Email and Calendaring, separately configurable
- **Modern calendaring features supported**
  - Calendaring built specifically for “shared resource scheduling” (eg. Meeting rooms)
  - Side-by-side calendars view to look for common availability
- **Meeting room calendars are configurable**
  - Display free/busy. Private, title-only or full details
- **Calendar Integration Saves Time and Effort**
  - Eliminates error-prone task to copy/paste to/from email and calendars.

# Calendar Data Migration Timeline



- **Room Calendar Data Migration on “Flag Days”**
  - Focus users on WHEN calendars move; targeted communications.
  - Monday: Review Preparation and Support Procedures
  - Tuesday: Flag Day – Room Calendar Migration
  - Wed – Fri: User Calendar Migration... may stretch into following week.
  
- **March 20, 2012 – Flag Day 1: Pilot**
  - Computing Sector only. Allows us to work out the “rough edges”
  - 9 rooms in MM to migrate, 2 more rooms to setup.
  - 201 MM users to consider
  
- **April 3, 2012 – Flag Day 2: Proposed Migration Date**
  - All Fermilab meeting room calendars.
  - 83 rooms in MM (+3 in Lotus) to migrate, perhaps a few more rooms to setup.
  - 450 MM users to consider
  
- **May 15, 2012 – Meeting Maker goes offline**
  - No archival system will remain. MM really goes away (end license expense).

# FermiMail Calendar Events Breakdown



- **User Calendar: Events Breakdown (Events “include” recurrence)**
  - Meeting Room Events – in a scheduled meeting room
  - Personal Meeting Events – others invited, NOT in a scheduled meeting room
  - Personal Appointments – no one else invited, NOT in a scheduled meeting room
  
- **Meeting Room Events**
  - Room Admins migrate these from MM to FermiMail
  - Invitations will be (re-)sent as a side effect of the migration
  
- **Personal Meeting Events**
  - User can migrate themselves or request Project to migrate their calendar
  - Invitations can be (re-)sent. May or may not be a side effect of migration.
  
- **Personal Appointments**
  - User can migrate themselves or request Project to migrate their calendar
  - Invitations are not relevant.

# FermiMail Calendar Migration Components



- **Room Admins migrate Room calendars (Meeting Room Events)**
  - Project provides tested procedures
  - Project coordinates support and central communications
  
- **Service to migrate MM User calendars (Personal Meetings, Appointments)**
  - Users opt-in, due to caveats and their current calendar usage, for example
    - Caveat: migrator must have access to Email account.
    - Caveat: Banners and MM options cannot be migrated by tools. User must migrate.
  
- **... or Users may migrate their own MM User calendars**
  - Project requests that tested procedure be used
    - Avoids confusion, duplication, and known issues like timezone definition.
  - Project requests that users NOT self-migrate until after “rooms”.
    - Helps clarify WHICH events to migrate, and more consistent with temp config of rooms.
  
- **Project supports MM User Calendar “archiving”**
  - Users follow tested procedure that allows entire MM calendar to be saved in a format that can be viewed side-by-side new calendar.

# Meeting Room Calendar Data Migration



## ➤ Prepare

- Procedures: Define and test, document, and communicate
- Data: Room Name and Properties, Workflow Config, Room Admin “Groups”
- Training: Setup a test room per “group” to allow practice (after Flag Day 1)
- Documentation: Create, test, and post to <http://computing.fnal.gov/FermiMail>

## ➤ Setup

- Rooms: Name, properties, and workflow config
- Room Admin (delegate) permission groups – long-term support
- Room Admin migration permission groups – for migration only
- Room migration team desktops – Outlook migration profile, spell-check setting...

## ➤ Execute – Flag Day

- Monday: check room setups, review support procedures
- Tuesday: Flag Day – Room Calendar Migration
  - About 2 min/Event, 30-60 Events/room → about 2 FTE-hours/room
- Wed – Fri: User Calendar Migration... may stretch into following week.

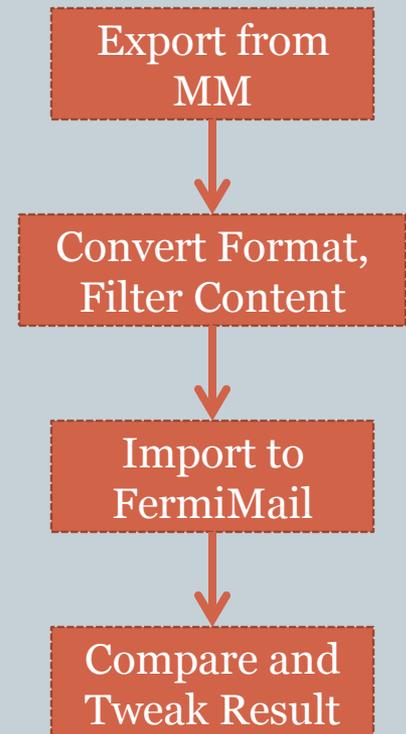
## ➤ Feedback

- Share experience and work-arounds

# Meeting Room Calendar Data Migration Procedures



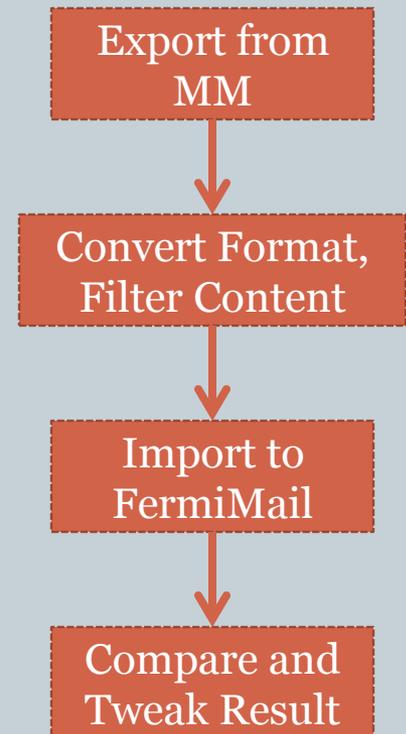
- Two procedures to choose from:
  - Manual Re-entry: easier, slower
  - Single Event Export/Import: must learn, faster
- Choose Manual Re-entry by default
- Choose Single Event Export/Import if:
  - More than 100 Events per migrator
    - Faster migration makes up for learn/practice time
  - Most Events have MANY Attendees
  - Need to preserve “cancelled meetings” info in past
- Export/Import will “fail”: < 1% Events
  - Certain recurrence patterns
  - Procedure → a list of what to manually re-enter



# Meeting Room Calendar Data: Manual Re-entry



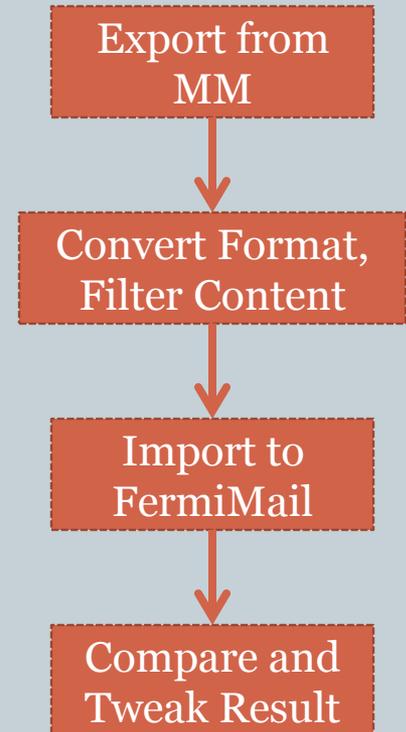
- **Export an ICS file of Meetings in Room**
  - Don't worry. We'll document how...
- **Convert this to a compact Event Listing**
  - 1 line per Event, recurring or not
- **Manually re-enter Events into FermiMail**
  - Summary, Times, Description, Attendees, etc.
  - Recurrence patterns: 1<sup>st</sup> and 3<sup>rd</sup> Wed → 2 Events
- **Manually apply MM Options as needed**
  - MM Options: Private, Reminder, Flexible, Labels
- **Compare Meetings in FermiMail to MM**
  - May tweak visibility (title only), etc.



# Meeting Room Calendar Data: Single Event Export/Import



- **Export an ICS file of Meetings in Room**
  - Don't worry. We'll document how...
- **Convert content to a zipfile of ICS files**
  - Zipfile contains a directory of 1-event ICS files
  - Also: report of Events requiring manual re-entry
- **“Update” Events 1-at-a-time into FermiMail**
  - GUI form with Attendees, cancelled meetings
  - Select new room, tweak options, and “Send Update”
- **Manually Re-enter ~1% of Meetings per list**
- **Manually apply MM Options as needed**
  - MM Options: Private, Reminder, Flexible, Labels
- **Compare Meetings in FermiMail to MM**
  - May tweak visibility (title only), etc.



# Calendar Data Migration: Some Caveats and Known Issues



- **Export/Import Limitations**
  - Banners and similar specialty events not migrated
  - MM Options not migrated
  - Some MM recurrence patterns not supported by FermiMail
    - Must translate into what IS supported
    - Example: 1<sup>st</sup> and 3<sup>rd</sup> Wednesday of month → 2 events: 1<sup>st</sup> Wed and 3<sup>rd</sup> Wed
  
- **User MM configuration not migrated**
  - Working hours, label values, etc.
  
- **User Calendar Data Migration Service**
  - Must have access to user's Email/Calendar account
  - Will not migration MM Options
    - Private events may be left visible until user fixes
  - **ONLY March 2012 forward will be migrated**
    - Use archive approach to see older calendar data

# Room Calendars: Web Version



- HTML Version of MM Room Calendars – replacement:
- Already Built into FermiMail:
  - Anyone with a FermiMail account can see public room calendars in their Outlook or WebMail clients.
    - “Add Calendar...” and search for room name
    - Outlook: Room Finder (filters out non-room from search, etc.)
- But also require: no-login “Web View” for a few specific rooms
  - Experimental Areas – support visitors without a FermiMail acct
  - Other areas, perhaps involved in public outreach.
  - Some room with this kind of view now belong to: PPD/CDF, PPD/Do, CS
- FermiMail capable of “Internet Calendaring”: deploy w/migration
  - Calendar on web has much functionality: multiple views, respects privacy.
    - Based on webmail (OWA) view of calendars.
  - If you setup a room for this (if desired) during migration → web view URL
    - Then, replace old MM-related URL with new web view URL on referring web pages.
    - Initial setup appears to require Full Access (not just Delegate) permission, which will be available during migration. (previously mention technical issue resolved)

# Room Configuration Data



**ROOM ADMIN GROUPS**  
**ROOM NAMES AND OTHER PROPERTIES**  
**ROOM WORKFLOW CONFIG**  
**ROOM MIGRATOR LIST**

# Room Configuration Data Overview



## ➤ What we need to know

- Is your list of rooms complete?
- Is our proposed organization of rooms into permission groups appropriate?
- For each room: Name and other properties, etc.
- For each room: workflow configuration parameters
- For each group: list of room admins (can evolve over time)

## ➤ When we need it

- Computing Sector – as soon as possible, to support piloting training/practice
- Fermilab at large: March 9, 2012
  - To support early setup for migration and operations practice
  - Sheila will send information to room (permission) group lead by Friday 3/02

## ➤ How will you be able to check it

- Room Finder on test room only – unless we can block invites before Flag Day
- Training/practice in a test room (1 per room group) – after March 20
  - Leaves 2 weeks for practice and tweaking before Flag Day 2

# Room (Permission) Groups: Part 1



- **For all Room Groups:**
  - Currently listed room-group “scheduling leader”: listed after group name
  - Need list of room admins who can delegate for any room within group
  
- **AD – 13 rooms: Traci Langford**
- **BSS – 3 rooms (coming from Lotus): Mari Mendez**
  - We will discuss directly with Room Admins how these rooms will be migrated.
- **CS – 11 rooms: Griselda Lopez**
- **DIR – 15 rooms: Michelle Gleason**
- **ESH+Medical – 3 rooms: Jody Federwitz**
- **FESS – 7 rooms: Odarka Jurkiw**
- **TD – 11 rooms: Marie Herman**
- **WDRS – 6 or 7 rooms: Christine Johnson**
  - Might consider separate group for Education/Training Rooms?

## Room (Permission) Groups: Part 2



- LPC – 4 rooms: Elaine Phillips
- PPD-CDF – 5 rooms: Elaine Phillips
- PPD-Do – 6 rooms: Elaine Phillips
- PPD-EPP – 3 rooms: Elaine Phillips
- PPD-LBNE – 2 rooms: Elaine Phillips
- PPD-Centers-Misc – 8 to 10 rooms: Elaine Phillips
- \_\_\_\_\_
- Overall Total: 97 to 100 rooms

# Room Properties



## ➤ Room Name

- Pattern: Owning Org Unit / Location / RoomShortName
  - Example: CS/ Feynman Computing Center 3rd Fl/FCC3

## ➤ Email Address

- Example: FCC\_3@fnal.gov

## ➤ Location

## ➤ Business Phone

## ➤ Capacity

## ➤ Description: more information to select a room by...

- Blackboard, Whiteboard, RoomPC, Projector, Speakerphone,
- VideoConference, PhoneVideoconfSystem (both), ...
- And anything else you may feel is appropriate for room selection.

# Room Reservation Workflows



- Workflows: Room Admins “centrally”, “decentrally” manage
  - Centrally manage: default
    - Users are request a room meeting time from Room admins by email or phone
    - Room admins create or reject meeting request.
    - Room admins must maintain the meeting invitation (change invitees, etc).
    - Room admins can “get room back” if needed.
  - Decentrally manage: permitted? (can still centrally manage too)
    - Users are expected to invite rooms to meetings themselves.
    - Room admins accept/reject room invites.
      - Can accept/reject meeting time changes.
    - Users can then maintain the meeting invitations (change invitees, etc).
    - Room admins can “get room back” if needed.
- Reality: This can be different from room to room, or mixed.

# Room Reservation Workflow Configuration



## ➤ Auto-Book (a.k.a Auto-Accept)

- Industry norm, but does really match our current patterns
- Bug: in Outlook if Auto-Book OFF. Must use OWA for room to accept.
- Note: all rooms will temporarily be set to auto-accept during room migration

## ➤ Allow Conflicts

- May seem like a bad idea, BUT:
  - Timeslot reservations are used in some rooms, regularly overlap real meetings
- Note: all rooms will temporarily be set to allow conflicts during room migration. May disallow during user calendar migration.

## ➤ Booking Window

- Avoids stale meeting reservations.
  - But can be troublesome for long-standing meetings due to re-creation requirement.
- 1 year is our guidance, if this is to be set at all.
- Note: all rooms will temporarily be set to no limit during room migration

## Also: Room Calendar Migrators List



- **Need a list of who will perform migrations**
  - We need to create special migration permission groups
  - We need this by March 16, 2012... to prep test rooms
  - OK to say: everyone in room group might migrate... we just do not want to assume this.
  
- **Prefer: list of Windows desktop/laptop computers to be used for migration – if not usual assigned one**
  - New Outlook profile required for migration.
  - We can configure the Outlook profiles and turn off spell checker for the migration.
  - Only need to know if it is NOT their assigned desktop/laptop
  - Also by March 16, 2012... to prep test room usage

# Reference Slides



**TO ADDRESS SPECIFIC QUESTIONS**

# User Calendar Data Archiving: Mass Export/Import



- Export an ICS file of User Calendar
  - Don't worry. We'll document how...
- Convert content into appropriate ICS file
  - Also: report of Events requiring manual re-entry
- Open ICS file as a separate calendar
  - Do not "Merge" into main FermiMail calendar
- Manually Re-enter ~1% of Meetings per list
  - Careful to re-enter into archive calendar only
- Manually apply MM Options as needed
  - Most people won't bother... no need really.
- Compare Meetings in FermiMail to MM
  - Just in case...

