



Headquarters
New Zealand Defence Force
Defence House
Private Bag 39997
Wellington Mail Centre
Lower Hutt 5045
New Zealand

OIA-2025-5488

15 September 2025

s. 9(2)(a)

Dear s. 9(2)(a)

I refer to your email of 24 July 2025 requesting, under the Official Information Act 1982 (OIA), the following (this has been numbered for ease of reference):

By way of the OIA, the NZ Herald seeks the following documents in relation to the new IT system.

- 1. A Project Charter/Initiation Document that defines the scope and objectives of the new IT system along with timeline and required resources;*
- 2. A Requirements Document, if separate, that specifies what the system must do and what attributes it must have;*
- 3. A Data Migration Plan that describe the strategy and timelines for extracting, transforming, and loading existing data from the old system into the new one;*
- 4. An Integration Plan that shows how the new system will connect and interact with other existing systems within the organisation's IT landscape;*
- 5. A Testing Plan defining the scope, objectives and types of testing to check function and performance against requirements;*
- 6. The "Go-Live Plan" that sets a checklist and timeline for the actual transition from the old system to the new one;*
- 7. The Contingency or "Rollback" Plan that shows processes to revert to the old system in case the new system encounters issues*

On 31 July 2025, you confirmed that the specific information being sought concerns the New Zealand Defence Force (NZDF) email system.

Migration of NZDF services to Microsoft 365 includes a transition to Exchange Online. While this is underway, risk management and operational support needs are being maintained in the interim by:

- upgrading NZDF email systems from Exchange 2010 to Exchange 2016;
- progressing the transition from Exchange 2016 to Exchange online;
- implementing controls that ensure NZDF emails will continue to be archived and available to meet information retention requirements; and,
- working to progress the upgrade of NZDF's historic email archive system.

These interim efforts are designed to support the responsible stewardship of data and operational continuity of the NZDF while the final ICT solution is finalised and implemented.

For item 1 of your request, the Enterprise Productivity Business Case is publicly available on the NZDF website¹.

With regard to items 2 and 4, the requested information is contained within the Detailed Design Document. This document is withheld in full under section 6(a) of the OIA, as it contains sensitive technical and security-related information, the release of which would unreasonably prejudice the defence or security of New Zealand.

For item 3, relevant documents are provided at Enclosures 1 to 5 answer, with Enclosure 6 provided in response to item 5. Page 6 of Enclosure 2 provides relevant information concerning item 6, and page 2 of Enclosure 1 provides the same for item 7. Where indicated, and as noted above, sensitive technical and security information is withheld in accordance with section 6(a) of the OIA.

You have the right, under section 28(3) of the OIA, to ask an Ombudsman to review this response to your request. Information about how to make a complaint is available at www.ombudsman.parliament.nz or freephone 0800 802 602.

Please note that responses to official information requests are proactively released where possible. This response to your request will be published shortly on the NZDF website, with your personal information removed.

Yours sincerely

GA Motley
Brigadier
Chief of Staff HQNZDF

Enclosures:

1. April 2024 Board Pack
2. November 2024 Board Pack
3. February 2025 Board Pack
4. March 2025 Board Pack
5. June 2025 Board Pack
6. Pilot Test Scenarios

¹ <https://www.nzdf.mil.nz/assets/Uploads/DocumentLibrary/New-Zealand-Defence-Force-Enterprise-Productivity-Business-Case-v4.pdf>



TE OPE KĀTUA O AOTEAROA
DEFENCE FORCE

Modern Desktop Deployment Update

April 2024



HEI MANA MŌ AOTEAROA
A FORCE FOR NEW ZEALAND

Modern Desktop Deployment Update

Apr 24 Deployment Technical Solution Requirements

To deliver the capability drops for the Apr deployment, there are four outstanding technical components which need to be addressed in relation to device security uplift and upgrading email infrastructure. Based on progress to date:

- Android Device Security Uplift, Completion of Email Migration to Exchange 2016 and Disconnecting Email Exchange 2010 Email Servers have confirmed go to green plans.
- Deployment of Exchange Hybrid is dependent upon completion of the three outstanding technical components above.

Therefore, deployment timeframes remain under confirmation.

Section 6(a)

Area	Technical component	Current challenge	Go-To-Green	Estimated completion timeframe
s. 6(a)				
4 Email infrastructure upgrade (Enablement of Exchange Hybrid)	Completion of Email Migration to Exchange 2016	Approx. 6,500 shared mailboxes and users still require to be migrated to Exchange 2016 s. 6(a)	The Product Team has confirm the proposed way forward including: 1. s. 6(a) 2. Pending successful outcome of Pilot, remaining/unidentified mailbox migrations to be complete by 17 May 24.	17 May
	Disconnecting Exchange 2010 Email Servers	Additional work is required to disconnect the Exchange 2010 servers prior to the enablement of Exchange Hybrid.	The Product Team has confirm the proposed way forward including: 1. The intention to disconnect then decommission the current Exchange 2010 servers; 2. Prior to disconnecting and decommissioning, DDG/ Project Team will migrate all mailboxes (including Veteran affairs) off the legacy Exchange 2010 Servers, including validating that there is no residual data still residing on these servers. Note, the Decommissioning of Exchange 2010 will occur at a later date with 'disconnecting' providing an additional recoverability option should challenges eventuate with the deployment of Exchange Hybrid (i.e. both roll-back and fail forward options will be available).	30 May Estimated based on initial discovery work.
	Exchange Hybrid	Prior to enablement, outstanding email infrastructure upgrade activities (Migrate to Exchange 2016/ decommission Exchange 2010 servers) need to be addressed. In addition, Exchange Hybrid did not pass vulnerability scanning assessment.	Deployment of Exchange Hybrid is dependent on completion of: 1. Email Migration to Exchange 2016. 2. Addressing the challenges in decommissioning 2010 email servers. 3. The remediation plan that addresses vulnerability scan assessment findings, and submitting a revised risk profile assessment. 4. iATO approval for M365 platform R&B.	30 May Estimated based on disconnecting 2010 timeframes.

Modern Desktop Deployment Update

Modern Desktop Deployment Plan on a Page



1 – 12 Apr

15 – 26 Apr

29 Apr – 10 May

13 – 24 May

30 May

3 – 7 Jun

Late-Jun
+2 weeks following "Go" decision

Enablement of Exchange Hybrid

Completion of Email Migration to Exchange 2016

Disconnecting 2010 Servers

iATO approval for M365 platform R&B (under analysis)



Exchange Hybrid ready



Enablement of Exchange Hybrid

Change Management

1 Awareness communications to user groups (Pilot Phase 2, non-managed devices users and all NZDF (for Exchange Hybrid))

2

Training / on-boarding and awareness materials released to users (all as required)

3

Communication to users leading up to deployment and providing updates as require (pre 'go live' emails)

4

Drop-in sessions for Modern Desktop users (4 x 1.5 hour session over 2 x weeks)

5

'Go live' email communications (Pilot Phase 2, non-managed devices users and all NZDF (for Exchange Hybrid))

6

NZDF-wide awareness communications for 'go live'

3

4

Completion of change activities three and four require technology solution to be completed.

5

6

Completion of change activities five and six require Go Live date to be confirmed.

Out of scope

Out of scope information removed

Appendix - Modern Desktop TQA and Go Live Criteria

March 2024

Modern Desktop Technical Quality Assurance

Out of scope



Email Infrastructure Upgrade:

- c) **Exchange 2016 Migration:** There are outstanding dependencies which need to be resolved prior to migrating the remaining user mailboxes on to the Exchange 2016 servers;
- d) **Decommissioning of Exchange 2010 Servers:** There are an unknown number of applications reliant on the Exchange 2010 servers which require decommissioning; and
- e) **Exchange Hybrid:** It was reported that vulnerabilities identified during security testing of the Exchange Platform have not been resolved. Note, Deloitte did not see the vulnerability scan results and therefore cannot comment further.

Out of scope



Modern Desktop Go-Live criteria (as at 5 Apr 24)

Workstreams	Status	Go-Live criteria	Activity/Commentary	Est. Completion Date	Status - Apr Deployment.
Out of scope					
Out of scope information removed			Exchange 2016 Email System Upgrade: Activities to complete the email upgrade from Exchange 2010 to Exchange 2016 remain outstanding (approx. 6,500 shared mailboxes and users still required to be upgraded). To deliver outstanding activities, there is a project dependency on the completion of the Blackberry device upgrades. Completion of the Blackberry upgrades has been delayed (resolved and progressing), putting the email upgrade timeline at risk.	17 May	Delayed
			Exchange Hybrid: The Vulnerability assessment for Exchange Hybrid did not meet the required NZDF standards, with three critical remediation activities identified for completion. Two of the remediation activities are under action by the Project/Product Team (est. completion w/c 18 Mar) and require completion prior to deployment.	30 May	Delayed
			Out of scope		

04

MODERN DESKTOP UPDATE (INCLUDING EXCHANGE ONLINE)

MODERN DESKTOP & EXCHANGE ONLINE

Purpose

The purpose of this update is to:

- Present the key challenges and change impacts identified from the Exchange Online (email upgrade) Pilot;
- Outline the mitigations to address these key challenges and present what this means for deployment, including wider timeframes for the Modern Desktop deployment; and
- Seek approval of the updated timelines to commence deployment for Exchange Online and complete the Modern Desktop wider deployment.

Background Modern Desktop

Out of scope

Out of scope information removed

Background Exchange Online (email upgrade)



- The Enterprise Productivity SSBC included the deployment of a more reliable email system, Exchange Online, to all NZDF users.
- The deployment takes a two-stage migration approach, first moving from Exchange 2010 to Exchange 2016 and then to Exchange Online.
- Stage One, Exchange 2010 to Exchange 2016 was completed in Jul 24, with all NZDF mailboxes being successfully migrated.
- In early Nov 24, The Exchange Online Pilot was deployed to 250 users. The purpose of the Pilot was to test the technical readiness and user impacts prior to wider rollout to all NZDF users (circa. 13,100).
- To support the Pilot, a Change Impact Assessment was completed to understand the 'people', 'process', and 'technology' change impacts that users would experience during and post deployment. This is to ensure the right support is put in place for users when Exchange Online is deployed.
- Results from the Pilot and Change Impact Assessment highlighted **key impacts** (described overleaf) that would need to be resolved / have the appropriate mitigation plans in place prior to deployment due to the impact rating and number of users affected.
- The DIP Programme, Project Team, and DDG have been working closely to understand these challenges and develop options to confirm the preferred way forwards.



EXCHANGE ONLINE KEY IMPACTS

section 6(a)

Analysis was undertaken by the Project and DDG to understand the impacts associated with the deployment of a more reliable email system (Exchange Online).

The Pilot identified the key changes below that would impact users if no mitigations (both technical and change) are in place.

Impacted Personas		End user Impacts	
Key Changes		Impact	Persona impacted
s. 6(a) Thick Client users circa. 3,000 users (included in the Modern Desktop user count) 	Loss of access to Outlook (application) on DIXS and Thick Clients	High - Users will no longer be able to access email (Outlook application), including shared mailboxes on DIXS and Thick client devices. Note certain NZDF personal only use a Thick Client due to the nature of their day-to-day tasks. - To access emails users will need to log into the Modern Desktop or use a mobile or managed device.	Users Impacted: - All NZDF users s. 6(a) - Thick Client users Total: 13,100
	Loss of business functionality for users	High DIXS applications that interact with outlook, will be disrupted. s. 6(a)	Users Impacted: - All NZDF users s. 6(a) Total: 13,100 users
	Inability to transfer files from DIXS to the Modern Desktop via email	High - Users will no longer be able to use email to transfer files from their DIXS or Thick Client desktop to the Modern Desktop. - After a user has migrated to Exchange Online, they will have no method of transferring documents between DIXS and the Modern Desktop.	Users Impacted: - All NZDF users s. 6(a) Total: 13,100 users
Financial Consideration		s. 6(a)	

* There are a number of user impacts outlined in the Change Impact Assessment that are not included in this update. This is because their impact rating is 'medium' to 'low', with change activities able to be put in place to support users through the changes with no loss to functionality.



EXCHANGE ONLINE PROPOSED WAY FORWARDS

To reduce the impact of the key changes highlighted below, and to minimise service disruption, the Project team and DDG have developed a technical way forwards that will reduce the residual impact for three out of the four key user changes (information detailed below).

End user Impacts				
Key Changes	Initial Impact	Technical mitigation / approach	Change Support	Residual Impact
Loss of access to Outlook (application) on DIXS and Thick Clients	High	Thick Client: - For NZDF Thick Client users, mitigation is dependent on the deployment of device-as-a-service as part of EPP2. - Initial deployment dates under analysis, targeting late 25 onwards.	- As part of the change support plan, users will receive targeted awareness communications to prepare them for the upcoming changes. - Users will need time to prepare for the change, and therefore analysis on adequate time is under confirmation.	High
		s. 6(a)	- Users will receive targeted awareness communications to prepare them for the upcoming changes. - Communications will include training materials to support with behavioral changes required once they have migrated to Exchange Online. - Users will be given time to prepare for the change.	Medium
Loss of business functionality for users	High	- Technical work to make InfoPath accessible within the Modern Desktop has been completed and currently undergoing testing. - Users will be able to access business workflows within the Modern Desktop in the same way they did in the DIXS desktop.	- As part of the change support plan, users will receive targeted awareness communications two weeks ahead of their migration date to prepare them for the upcoming changes. - Communications will include training materials to support with behavioral changes required once they have migrated to Exchange Online.	Medium
Inability to transfer files from DIXS to the Modern Desktop via email	High	Technical approval to use personal DDMS shared drive as a method to transfer files between DIXS and the Modern Desktop.	- Ahead of the migration to Exchange Online, users will receive communications notifying them of the loss of DIXS Outlook as a method to transfer files. They will be made aware that there is an alternative method after migration. - As part of the change support plan, users will receive training materials on how to transfer files between the desktops once DIXS Outlook is no longer available.	Medium

Financial Impacts

s. 6(a)

REMAINING DEPLOYMENT PLAN

Section 6(a)

Remaining deployments for the Modern Desktop Project include:

- **Wider rollout of the Modern Desktop** to remaining circa. 6,100 users **s. 6(a)**
- **Exchange Online (email upgrade) deployment** to circa. 13,100 users (9,800 wider NZDF users **s. 6(a)**)

Considerations/ planning assumptions to inform the updated deployment plan have been reflected in the indicative timeline below. To inform a wider Go/ No Go Decision, acceptance criteria to inform and measure deployment readiness remains under development.

Key planning assumptions and considerations

NZDF Change Freeze:

- No deployment of Modern Desktop or Exchange Online will occur between 11 Dec 24 – 24 Jan 25 to align with NZDF change freeze.
- Based on procurement of remaining circa. 6,100 licenses by Dec 24, all remaining deployments will occur post NZDF change freeze.

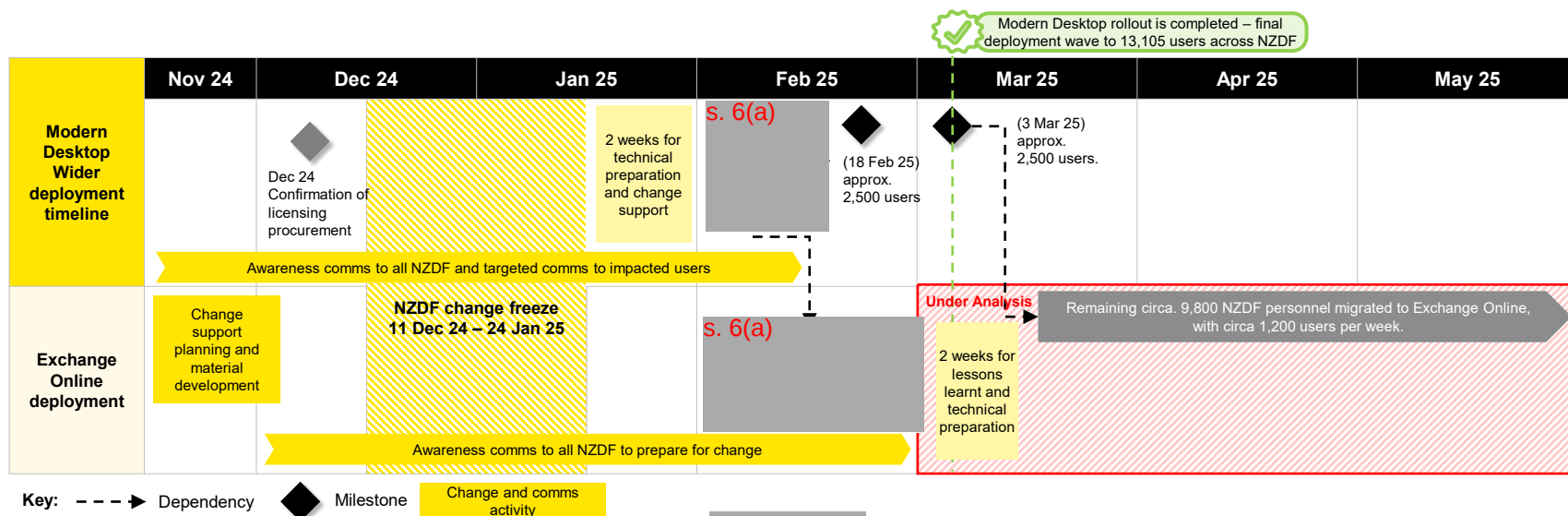
Modern Desktop deployment

- Modern Desktop is a pre-requisite to the deployment of Exchange Online. DDG have confirmed multiple streams of effort can be supported and delivered in parallel i.e. Exchange Online can be delivered alongside Modern Desktop deployment.

Exchange Online

s. 6(a)

- To support users with the removal of Outlook access on DIXS and Thick Clients:
 - Users will be notified 2-3 months ahead of Exchange Online deployment to allow them time to prepare.
 - Thick Client users will be identified and planned for later deployments to align with EPP2 timeframes.
 - DDG and Project will monitor user feedback and update as required.



05

MODERN DESKTOP & EXCHANGE ONLINE UPDATE

MODERN DESKTOP & EXCHANGE ONLINE

Out of scope

Background Exchange Online (email upgrade)



- The Enterprise Productivity SSBC included the deployment of a more reliable email system, Exchange Online, to all NZDF users.
- The deployment takes a two-stage migration approach, first moving from Exchange 2010 to Exchange 2016 and then to Exchange Online.
- Stage One, Exchange 2010 to Exchange 2016 was completed in Jul 24, with all NZDF mailboxes being successfully migrated.
- In early Nov 24, The Exchange Online Pilot was deployed to 250 users. The purpose of the Pilot was to test the technical readiness and user impacts prior to wider rollout to all NZDF users (circa. 13,100).
- To support the Pilot, a Change Impact Assessment was completed to understand the 'people', 'process', and 'technology' change impacts that users would experience during and post deployment. This is to ensure the right support is put in place for users when Exchange Online is deployed.
- Key call outs from Pilot migration – users have said *'The migration to Exchange Online pilot has provided me with the ability to be accessible from anywhere. Whether using Outlook App on my personal phone, laptop all my info stays co-ordinated.'*
- Results from the Pilot and Change Impact Assessment highlighted **key impacts** (described overleaf) that would need to be resolved / have the appropriate mitigation plans in place prior to deployment due to the impact rating and number of users affected.
- The DIP Programme, Project Team, and Info Comm have been working closely to understand these challenges and to develop a migration approach to onboard users.



EXCHANGE ONLINE PROPOSED WAY FORWARDS

To reduce the impact of the key changes highlighted below, and to minimise service disruption, the Project team and Info Comm have developed a technical way forwards that will reduce the residual impact for three of the key user changes (information detailed below). For more detail on original assessment please see slide within Appendix.

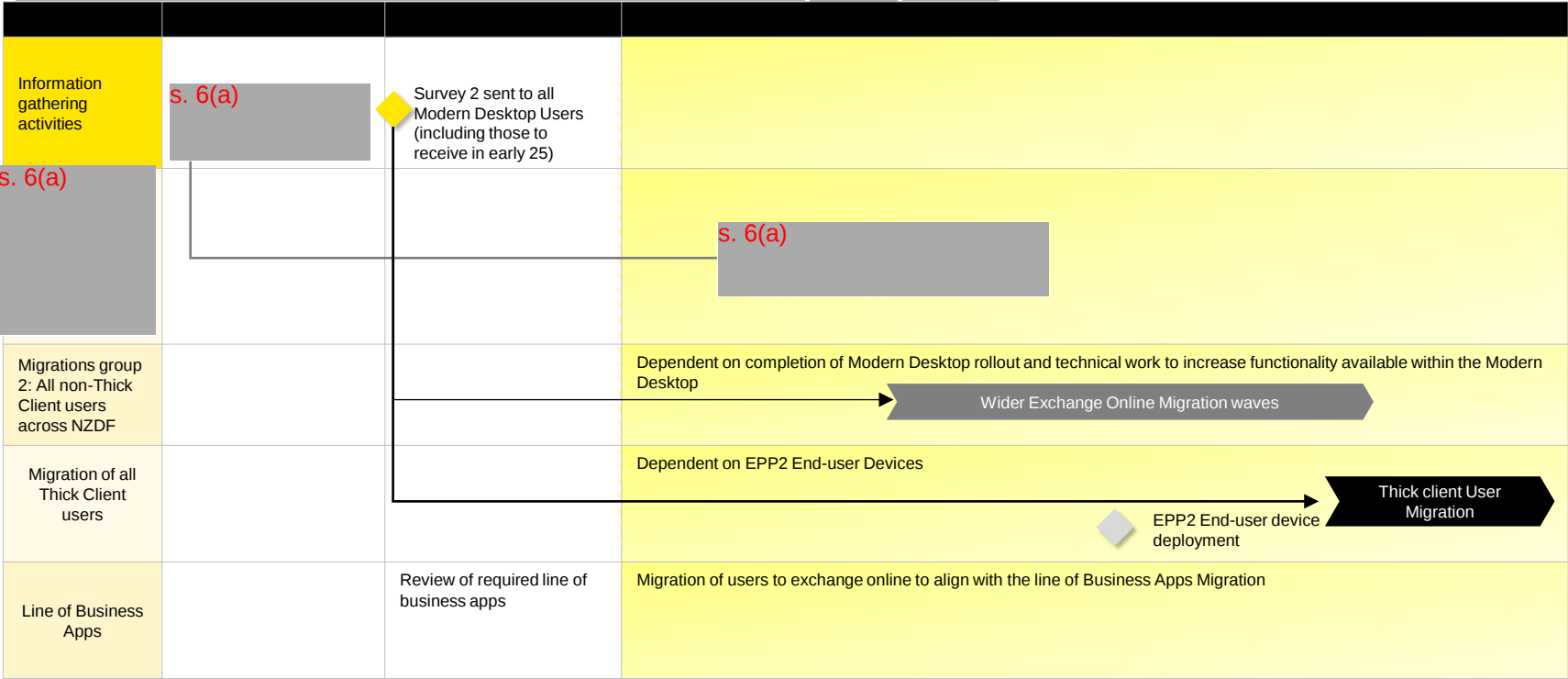
End user Impacts				
Key Changes	Initial Impact	Technical mitigation / approach	Change Support	Residual Impact
Loss of access to Outlook (application) on DIXS and Thick Clients	High	Thick Client: - For NZDF Thick Client users, mitigation is dependent on the deployment of device-as-a-service as part of EPP2. - Initial deployment dates under analysis, targeting late 25 onwards.	- As part of the change support plan, users will receive targeted awareness communications to prepare them for the upcoming changes. - Users will need time to prepare for the change, and therefore analysis on adequate time is under confirmation.	High
Loss of business functionality for users	High	S. 6(a) A phased approach to migrate Users with key applications within DIXS who have requirements to share information will be migrated to exchange online as the applications are migrated to Modern Desktop.	- Users will receive targeted awareness communications to prepare them for the upcoming changes. - Communications will include training materials to support with behavioral changes required once they have migrated to Exchange Online. - Users will be given time to prepare for the change. - As part of the change support plan, users will receive targeted awareness communications two weeks ahead of their migration date to prepare them for the upcoming changes. - Communications will include training materials to support with behavioral changes required once they have migrated to Exchange Online.	Medium
Inability to transfer files from DIXS to the Modern Desktop via email	High	Technical approval to use personal DDMS shared drive as a method to transfer files between DIXS and the Modern Desktop.	- Ahead of the migration to Exchange Online, users will receive communications notifying them of the loss of DIXS Outlook as a method to transfer files. They will be made aware that there is an alternative method after migration. - As part of the change support plan, users will receive training materials on how to transfer files between the desktops once DIXS Outlook is no longer available.	Medium

Exchange Online Deployment Plan

Following the direction of the DIP Programme Board (Nov 24) a migration plan and principles have been developed for the migration of user mailboxes to Exchange Online.

s. 6(a)

Section 6(a)



Migration Principals / Approach

- 1. ATO is received for wider phased Rollout
- 2. Waves of 1,000-1,500 users will be migrated every 3~ weeks.
- 3. All Thick client users will not be migrated until EPP2 delivers end-user devices.

s. 6(a)

RECOMMENDATIONS

Out of scope information removed

It is recommended that the DIP Programme Board:

Out of scope

Exchange Online:

- **Note** the update on the end user impacts for Exchange Online (including proposed mitigations for the end user impacts);
- **Approve** that voluntary users can be added to the current pilot phase, making sure there is an understanding of the key impacts of Exchange online will be critical before the user is migrated. This will assist in understanding all business areas for Change and Communications in preparation for wider rollout.
- **Note** Exchange Online deployment planning (including development of readiness acceptance criteria) remains under development. To maintain delivery momentum and ensure residual level impacts are a sufficient level:
- **Approve in Principle (subject to progress against readiness assessment/ Go-live criteria)** the deployment approach of Exchange Online to BlackBerry and Modern Desktop users;

Impacted Personas		End user Impacts	
	Key Changes	Impact	Persona impacted
s. 6(a)	Loss of access to Outlook (application) on DIXS and Thick Clients	High - Users will no longer be able to access email (Outlook application), including shared mailboxes on DIXS and Thick client devices. Note certain NZDF personnel only use a Thick Client due to the nature of their day-to-day tasks. - To access emails users will need to log into the Modern Desktop or use a mobile or managed device.	Users Impacted: - All NZDF users s. 6(a) - Thick Client users Total: 13,100
	Loss of business functionality for users	High DIXS applications that interact with outlook, will be disrupted.	Users Impacted: - All NZDF users s. 6(a) Total: 13,100 users
	Inability to transfer files from DIXS to the Modern Desktop via email	High - Users will no longer be able to use email to transfer files from their DIXS or Thick Client desktop to the Modern Desktop. - After a user has migrated to Exchange Online, they will have no method of transferring documents between DIXS and the Modern Desktop.	Users Impacted: - All NZDF users s. 6(a) Total: 13,100 users

* There are a number of user impacts outlined in the Change Impact Assessment that are not included in this update. This is because their impact rating is 'medium' to 'low', with change activities able to be put in place to support users through the changes with no loss to functionality.

MODERN DESKTOP – EXCHANGE ONLINE

EXCHANGE ONLINE GO-LIVE CRITERIA

The below table outlines the Go-Live Criteria that will enable the successful wider rollout of Exchange Online to all NZDF. The completion of these criteria will ensure a smooth transition from Exchange 2016 to Exchange Online as part of the Modern Desktop project.

Workstreams	Go-Live criteria	Commentary	Est. Completion Date	Status
Information Security Management (Technical C&A)	ATO for Exchange Online is achieved	- iATO was approved for Exchange Online as part of M365 suite iATO on 12 Jun 24. This is valid until 31 May 25 (complete). - Submission for Exchange Online ATO has been drafted and is with CISO for review and will be submitted to CJDS on 30 Nov (in progress). 23/01: The ATO minute is in progress for update, 2 of 3 remediation items have been completed with the third item REM03 to address the out of support Exchange server 2016 & 2019 in progress for PI.23.	TBC with DIS	In Progress
Technical Solution	Technical Solution Tested and signed off by Info Comm	- The Exchange Online technical solution has been tested, meets performance expectations, and is awaiting technical sign off by Info Comm (complete). - The technical solution for Exchange Online has been rolled out to 250 Pilot users. (complete).	29 Nov 24	Complete
		s. 6(a)	6 Dec 24	Complete
	Technical mitigations are confirmed to address user impacts identified during the Pilot.	Technical mitigation to transfer files from DIXS to the Modern Desktop: The technical solution for transfer of files (from DIXS to the Modern Desktop) is completed, tested, and ready for consumption. Technical DDG sign-off has been received (completed).	21 Nov 24	Complete
	section 6(a)	Technical mitigation to access to Outlook on Thick Clients: Loss of email (Outlook application) - Options to mitigate are yet to commence (not started). 23/01: Timeframes to be determined in line with EPP2 activity.	Estimated late 25	Not started
Service Management	Early Life Support agreed (including incident and problem management)	- Early Life Support activities to prepare Service Management teams (DISOC and FSTs) for wider rollout of Exchange Online. - A temporary process to triaging technical issues raised by users regarding Exchange Online will be in place to support Service Management teams for initial migration period 28/01: Tickets are currently being managed by Enterprise Apps for the pilot user base of 300. End of 2024 support handover commenced between DISOC & Ent Aps, however due to delay in wider migration this activity has been paused, and tickets are being managed by Ent Aps. As wider migration is determined a revised date of handover with DISOC will be reviewed.	TBC in line with wider roll-out.	In Progress
Information Management & Compliance	Information Management Policy	- Email storage has been confirmed to meet information management requirements through approval of C&A (complete). - Information Management Directorate have undertaken required information management training to support the Official Information Act (OIA) requests (complete).	Nov 24	Complete
Project Management	Wider rollout plan approved (including Go Live Criteria)	- Pilot and wider deployment of Exchange Online success criteria has been drafted and requires approval by DIP Governance in Feb 25. This includes technical measurement targets that will confirm readiness to complete wider rollout (in progress). - A draft deployment plan, has been completed with a number of planning assumptions and will be presented for approval by DIP Programme Governance (in progress). - An Exchange Online wider rollout plan, including mitigations to support Thick Client users (not started)	Feb 24	In Progress

EXCHANGE ONLINE GO-LIVE CRITERIA

Workstreams	Go-Live criteria	Commentary	Est. Completion Date	Status
Change Management	Change Impact Assessment is complete	- The Exchange Online Change Impact Assessment is complete with input from DDG Product Teams and will be submitted for endorsement to the Nov 24 DIP Programme Board (in progress). - High level findings from change impact assessment are: s. 6(a) - DIXS: No technical workaround required; access is via the Modern Desktop - Thick Client: Users will lose the ability to access email on their Thick Client device. - Identified 'high' Change Impacts are presented to the DIP Programme Board for acceptance of the impacts and approval of the mitigations in place to address these impacts: s. 6(a) - Date to be determined for submission to DIP Programme Board for Thick Client users changes and mitigations. Dependant on EPP2 activity. - A Change Impact Assessment for Thick Client users has not started. Dependant on EPP2 activity.	Mar 25	In Progress
	End User Change and Comms Plan is complete	- An Exchange Online Change and Communications Plan requires further development and has started. - Communications were tested on pilot group roll-out in November.	Mar 24	In Progress
	Pilot User Feedback does not report a degraded experience and has been included within the deployment approach	- Pilot feedback is being collected to inform technical and change recommendations prior to wider rollout of Exchange Online (in-progress). - Survey to the 300 Pilot users was sent 19 Nov 24 to understand the user experience. - Feedback from Pilot users will be incorporated into the deployment plan (both technical deployment and change and comms plan) (not started). - Note that key themes so far indicate that: - User experience was improved on a managed or mobile devices; - User experience deteriorated the experience on a Thick Client; and - Several users noted that the migration has had impact on their efficiency in completing day-to-day tasks due to: - Loss of Outlook in DIXS, amplified by the Modern Desktop not having the tools they need requires work across two environments to complete day to day tasks via 'reach back' and switching across the two.	N/A	In Progress
	End User Adoption and Training is complete	Training materials (FAQ's, knowledge articles and relevant training material) are under development, including Pilot feedback to ensure that they appropriately support users with migration (in progress).	Dec 24	Complete

EXCHANGE ONLINE USER SUPPORT AND COMMUNICATIONS APPROACH

section 6(a)

To reduce the impact of the changes to users caused by migration to Exchange Online, the following migration groups will receive the below communications and change artefacts. These have been tested and refined under pilot conditions.

s. 6(a)

MIGRATION GROUP	CURRENT IMPACT TO USER	CHANGE MITIGATIONS PLANNED	COMMUNICATIONS PLANNED
s. 6(a)	LOW	- Knowledge Base articles have been created to support users with further information about why the migration is happening and how to mitigate any expected, short-term impacts. - A one-pager has been developed to outline what functionality is available once migrated to Exchange Online and what is lost, with a clear message that once migrated to Exchange Online there is no opportunity to migrate back.	Email #1: Users will receive a targeted email to make them aware of their planned migration and prepare them for upcoming behavioural changes. This email will include information about the benefits of moving to Exchange Online and guidance on using the Modern Desktop if they are not already, as this is a pre-requisite of migrating to Exchange Online. Email #2: Users will receive an email ahead of migration to remind them of upcoming changes, share links to Knowledge Base articles and information about where to go for support.
Remaining non-thick client users across NZDF	MEDIUM	- As above. - Existing guidance for the Modern Desktop roll out will support users with access impacted applications via the DIXS reach back function.	ILP notification: A call for volunteers will be released via ILP. This will seek people who use highly impacted applications in DIXS but want to volunteer to migrate to Exchange Online in order to realise the benefits, accepting that they will need to use workarounds in the Modern Desktop once migrated. - Volunteer users will then receive email communications as per the low impacted users (as above). - Users who do not volunteer will be migrated as part of the thick client migration group, alongside the deployment of end user devices.
All thick client users across NZDF	HIGH	- As above. - Assessment of whether any change artefacts are needed will need to take place alongside the development of the deployment plan for end user devices.	As above.

EXCHANGE ONLINE



Purpose

The purpose of this update is to:

- Update the key challenges and change impacts identified from the Exchange Online (email upgrade) Pilot; and
- Request approval for the direction of travel for Exchange online including plan.

Background Exchange Online (email upgrade)

- The Enterprise Productivity SSBC included the deployment of a more reliable email system, Exchange Online, to all NZDF users.
- The deployment takes a two-stage migration approach, first moving from Exchange 2010 to Exchange 2016 and then to Exchange Online.
- Stage One, Exchange 2010 to Exchange 2016 was completed in Jul 24, with all NZDF mailboxes being successfully migrated.
- In early Nov 24, The Exchange Online Pilot was deployed to 250 users. The purpose of the Pilot was to test the technical readiness and user impacts prior to wider rollout to all NZDF users (circa. 13,100).
- To support the Pilot, a Change Impact Assessment was completed to understand the 'people', 'process', and 'technology' change impacts that users would experience during and post deployment. This is to ensure the right support is put in place for users when Exchange Online is deployed.
- Key call outs from Pilot migration – users have said *'The migration to Exchange Online pilot has provided me with the ability to be accessible from anywhere. Whether using Outlook App on my personal phone, laptop all my info stays co-ordinated.'*
- Results from the Pilot and Change Impact Assessment highlighted **key impacts** (described overleaf) that would need to be resolved / have the appropriate mitigation plans in place prior to deployment due to the impact rating and number of users affected.
- The DIP Programme and INFOCOM Product teams have been working closely to produce a high-level migration plan, highlighting key dependency activities that are either in progress or need to commence that fall outside of the DIP Scope.

RECOMMENDATIONS

It is recommended that the DIP Programme Board:

Out of scope

Exchange Online:

- **Note** the update on the end user impacts for Exchange Online (including proposed mitigations for the end user impacts).
- **Note** the current challenges update on the Exchange Online key issues.
- **Note** the dependencies and impacts on Exchange Online.
- **Approve** a high-volume pilot group scaling up to 1,000 user mailboxes, to test migration at scale (including testing processes and procedures are ready for ongoing deployments).
- **Approve** commencement of VIP users to be included in increased pilot group.

EXCHANGE ONLINE APPENDIX



EXCHANGE ONLINE DEPENDENCIES

Section 6(a)

APPENXDIX A. As per figure. 1 in the Exchange Online Deployment plan, the following dependencies and impacts have been highlighted as activities either

Dependency	Dependency Explained
CSAF ATO – approval still outstanding	Exchange Online iATO has been approved by CISO, final approval outstanding to be signed off by COMINFO. The interim iATO allows the project to rollout to all users, a remediation plan has been agreed and is on track
Exchange Server 2016 & 2019 upgrade	To maintain access to Exchange Online, the INFOCOM team must upgrade the Exchange On-premise solution to the latest version 2019. The users that are on Exchange will not see any impacts from this upgrade as it happens behind the scenes and will be completed by the product teams in BAU. The impact of not doing this is that it could affect performance and support.
Loss of business functionality for users	s. 6(a)
	INFOCOM is conducting work to get the analysis on applications to assist in the migration plan
	Other projects with direct dependencies on Exchange Online
Duty Phone pilot roll-out	As part of the Mobility project within DIP, the Intune build of duty phones requires the use of Outlook to access shared mailboxes. Outlook can only access mailboxes that have been migrated to Exchange Online. Both the duty phone user mailboxes and any shared mailboxes will need to be migrated to Exchange Online to avoid outage and business interruption. The duty phone pilot is currently on hold due to this direct dependency on Exchange Online migrations.

s. 6(a)

EXCHANGE ONLINE USER SUPPORT AND COMMUNICATIONS APPROACH

Section 6(a)

To reduce the impact of the changes to users caused by migration to Exchange Online, the following migration groups will receive the below communications and change artefacts.

These have been tested and refined under pilot conditions.

MIGRATION GROUP	CHANGE MITIGATIONS PLANNED	COMMUNICATIONS PLANNED
High volume pilot group & VIPs Rest of the organisation	Knowledge Base articles have been created to support users with further information about why the migration is happening and how to mitigate any expected short-term impacts.	Email #1: Users will receive a targeted email to make them aware of their planned migration and prepare them for upcoming behavioural changes. This email will include information about the benefits of moving to Exchange Online and guidance on using the Modern Desktop if they are not already, as this is a pre-requisite of migrating to Exchange Online. Email #2: Users will receive an email ahead of migration to remind them of upcoming changes, share links to Knowledge Base articles and information about where to go for support.
Remaining non-thick client users across NZDF	- As above. - Existing guidance for the Modern Desktop roll out will support users with access impacted applications via the DIXS reach back function.	ILP notification: A call for volunteers will be released via ILP. This will seek people who use highly impacted applications in DIXS but want to volunteer to migrate to Exchange Online in order to realise the benefits, accepting that they will need to use workarounds in the Modern Desktop once migrated.
All thick client users across NZDF	- As above. - Assessment of whether any change artefacts are needed will need to take place alongside the development of the deployment plan for end user devices.	As above.

05

OPEN MEETING

MODERN DESKTOP AND EXCHANGE ONLINE UPDATE

EXCHANGE ONLINE MIGRATION



Purpose

The purpose of this update is to:

- Current update on the wider migration activity & Key User migrations
- Update current key challenges;

Background Exchange Online (email upgrade)

- The Enterprise Productivity SSBC included the deployment of a more reliable email system, Exchange Online, to all NZDF users.
- The deployment takes a two-stage migration approach, first moving from Exchange 2010 to Exchange 2016 and then to Exchange Online.
- Stage One, Exchange 2010 to Exchange 2016 was completed in Jul 24, with all NZDF mailboxes being successfully migrated.
- In early Nov 24, The Exchange Online Pilot was deployed to 250 users. The purpose of the Pilot was to test the technical readiness and user impacts prior to wider rollout to all NZDF users (circa. 13,100).
- To support the Pilot, a Change Impact Assessment was completed to understand the 'people', 'process', and 'technology' change impacts that users would experience during and post deployment. This is to ensure the right support is put in place for users when Exchange Online is deployed.
- Key call outs from Pilot migration – users have said *'The migration to Exchange Online pilot has provided me with the ability to be accessible from anywhere. Whether using Outlook App on my personal phone, laptop all my info stays co-ordinated.'*
- Results from the Pilot and Change Impact Assessment highlighted **key impacts** that would need to be resolved / have the appropriate mitigation plans in place prior to deployment due to the impact rating and number of users affected.
- In the March DIP Board, the high-level migration plan, highlighting key dependency activities and risks was approved to migrate between 500-1000 user mailboxes. The Key User group, formally known as the VIP migration group approach was approved.
- The Key User group migration commenced with a smaller group of four, to test the processes and deployment. This activity was completed successfully on the 15th of April. The tested process and deployment method will be used for key users.

EXCHANGE ONLINE MIGRATION



Update

- Post the March 2025 DIP Board the team was given approval to commence wider migration of up to 500-1000 user mailboxes, by end of June.
- To date we have completed 594 user mailbox migrations, along with shared mailboxes. There are two more waves of users being migrated in the week of 9-13 June
- As part of this activity of the wider migration the processes and procedures have been streamlined to be able to on-board users, including the standardisation of communications out to users which has proven to be successful. Wider-migrations will continue to occur in parallel with key user migrations.
- At the March 2025 DIP Board, the approach to migrate Key Users to Exchange Online, utilising a phased approach was presented to the board and approved.
- The initial pilot on four non-Key Users to test the process and content was delivered successfully on the 15th of April.
- It was agreed at the March 2025 DIP Board, post outcome of the initial pilot of the four users a communications would be sent by INFO COMM to key users to provide an overview before commencing deployment with the second test group of actual Key Users. The communications has been reviewed and sent out to all key users, and the project team is commencing this scheduling

Key Challenges

- Limited resourcing available within current team to carry out the key user migration & wider migrations to Exchange Online requires an integrated approach across INFOCOM to resolve.

RECOMMENDATIONS

It is recommended that the DIP Programme Board:

Exchange Online:

- **Note** the update on for the wider rollout and key user migration to Exchange Online
- **Note** the current challenges update on the Exchange Online key issues.

APPENDIX – EXCHANGE ONLINE



EXCHANGE ONLINE DEPLOYMENT PLAN

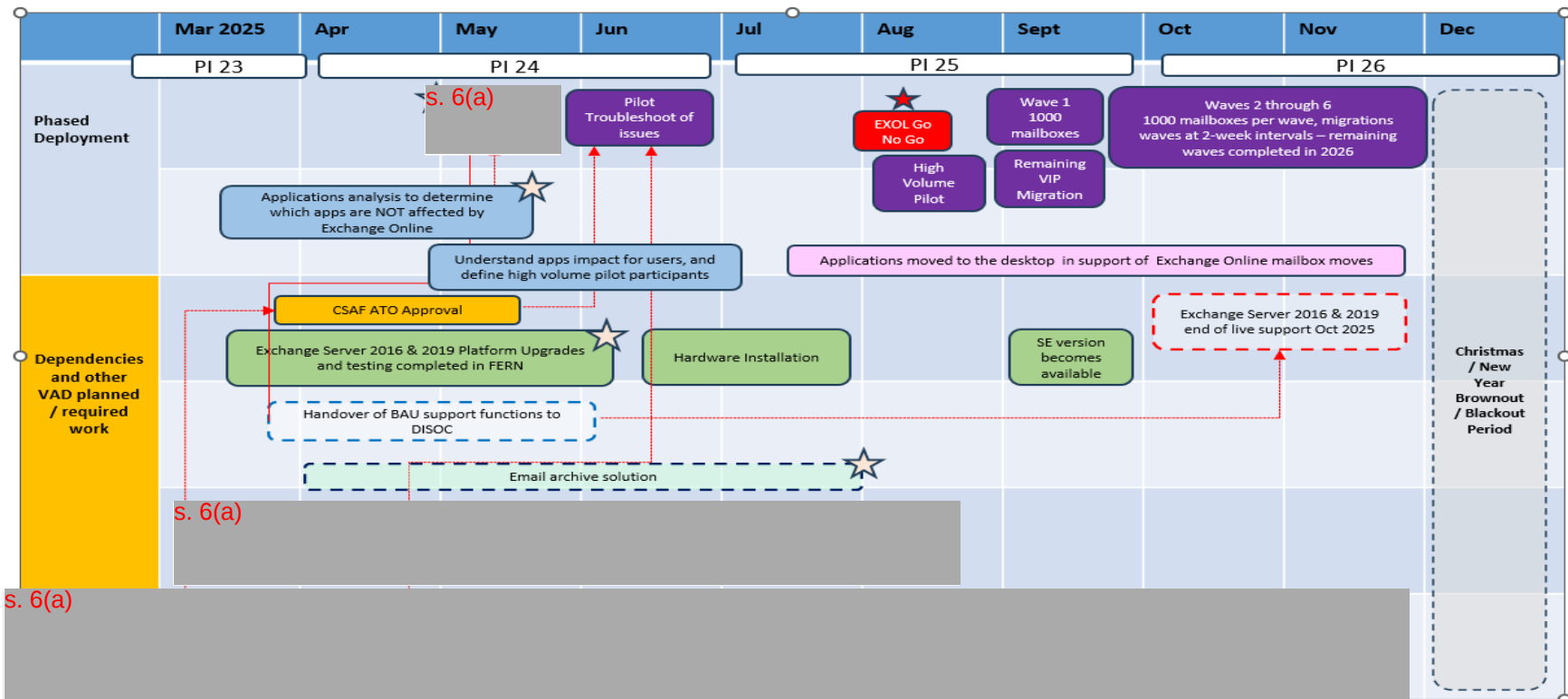
Using a similar approach to the previous migration of user mailboxes (Exchange 2010 to Exchange 2016), the programme intends to migrate user mailboxes over an extended period of utilising a phased approach, with mailboxes in both environments.

Section 6(a)

- s. 6(a) will be split into two migration groups (low impact group, and a remaining VIP group). Once the high-volume pilot of ~1000 users (planned for PI.25) completes the second portion of remaining VIPs will be migrated aligning with Analysis on applications.
- Migration waves to be planned and executed on a fortnightly basis, this works for the support teams DISOC & FSTs resources and will result in a migration starting this year and completing in the first half of 2026.
- It is expected that work will be required on applications that have dependencies on a user's mailbox to support the move to Exchange Online, this may result in a crossover of work currently planned under the Application Remediation initiative.
- A high-volume pilot of ~1000 user mailboxes is conducted in PI.25 to commence the phased approach to test processes and procedures picked up from Low Impact VIP Migration and to determine the scalability of migration for wider waves.
- Users who will be allocated into a wave will already have an E5 Microsoft license and access to Modern Desktop.

The below timeline shows the phased migration plan as well as other planned work, dependencies and direct impacts that are happening within Exchange Online.

Refer to Appendix A for more information on the highlighted dependencies from Figure .1



EXCHANGE ONLINE USER SUPPORT AND COMMUNICATIONS APPROACH

To reduce the impact of the changes to users caused by migration to Exchange Online, the following migration groups will receive the below communications and change artefacts.

These have been tested and refined under pilot conditions.

MIGRATION GROUP	CHANGE MITIGATIONS PLANNED	COMMUNICATIONS PLANNED
High volume pilot group & VIPs Rest of the organisation	- Knowledge Base articles have been created to support users with further information about why the migration is happening and how to mitigate any expected short-term impacts. s. 6(a) - A one-pager has been developed to outline what functionality is available once migrated to Exchange Online and what is lost, with a clear message that once migrated to Exchange Online there is a manual process to migrate the user back.	Email #1: Users will receive a targeted email to make them aware of their planned migration and prepare them for upcoming behavioural changes. This email will include information about the benefits of moving to Exchange Online and guidance on using the Modern Desktop if they are not already, as this is a pre-requisite of migrating to Exchange Online. Email #2: Users will receive an email ahead of migration to remind them of upcoming changes, share links to Knowledge Base articles and information about where to go for support. s. 6(a)
Remaining non-thick client users across NZDF	- As above. - Existing guidance for the Modern Desktop roll out will support users with access impacted applications via the DIXS reach back function.	ILP notification: A call for volunteers will be released via ILP. This will seek people who use highly impacted applications in DIXS but want to volunteer to migrate to Exchange Online in order to realise the benefits, accepting that they will need to use workarounds in the Modern Desktop once migrated.
All thick client users across NZDF	- As above. - Assessment of whether any change artefacts are needed will need to take place alongside the development of the deployment plan for end user devices.	As above.

User Scenarios	Test Description
MAILBOX FUNCTIONALITY	
User with individual mailboxes	Test access to individual mailbox located on <u>new</u> platform
User with access to shared mailboxes	Test access, send as, send on behalf of shared mailbox located on <u>old</u> platform with user in <u>new</u> Test access, send as, send on behalf of shared mailbox located on <u>new</u> platform with user in <u>old</u>
User with delegated access to mailbox	Test access is retained when user mailbox on <u>new</u> platform and delegated mailbox on <u>old</u> Test access is retained when user mailbox on <u>old</u> platform and delegated mailbox on <u>new</u>
User with access to public folders	Test access is retained when user mailbox is on <u>new</u> platform
User with Outlook rules	Test rules are retained and continue to function
User with OWA access	Test old OWA URL redirects to new platform once user is migrated to new platform
Access to equipment and room calendars	Test access to view, book, directly manage booking (if configured) when calendar on <u>old</u> platform and user on <u>new</u> Test access to view, book, directly manage booking (if configured) when calendar on <u>new</u> platform and user on <u>old</u>
s. 6(a)	Test access is retained to shared / equipment / room mailboxes and calendars when moved to <u>new</u> platform and user mailbox
User with access to Archive	Confirm behaviour, will access be retained for historical email only or will access be lost
Distribution List functionality	Confirm email is delivered to members of distribution list that are on old and new platform
Out of Office Functionality	Confirm Internal / External Out of Office behaviour between old and new platform users
Confirm Outlook Add-Ins	Confirm if any Outlook Add-Ins are deployed and confirm their functionality post user move
Global Address List	Confirm Global Address Lists contain all users regardless of being located on new or old platform
Service Account / Application Mailboxes	Confirm function continues where application may still be configured for old platform and mailbox located on new
Outlook plug ins	Confirm OnePlaceMail and other plug-in are functioning as
Scan to email	Confirm ability to scan document using follow me print and sent to a migrated email address
Sensitivity system RMS etc.?	Test to ensure that systems work as expected
Systems Email Delivery (Apps/Web/Etc)	s. 6(a)
Skype for business functionality	Test messaging, conversation history, status etc
Migrate users on RAS	Test migration of users that are using RAS
Access archive from Outlook	Test accessing archived email from Outlook ('Archive Search')
Offline address book enabled	Test to ensure that offline address book works as expected
Outlook Rules and Alerts (Client and server side rules still work)	Check Rules and Alerts still running

Auto forward and auto reply still in place and working	Check pre-set rules are still working
MAIL FLOW	
Send and receive e-mail messages via SEEMail	Test SEEMAIL send and receive, ensure email is blocked if used incorrectly
Send and receive e-mail messages to migrated users	Test send outgoing and test check incoming emails to migrated users
Send and receive e-mail messages to non-migrated users	Test send outgoing and test check incoming emails to non-migrated users
Send and receive e-mail messages to external users	Test send outgoing and test check incoming emails to external users
Send and receive e-mail messages to shared mailboxes	Test send outgoing and test check receive emails to shared mailboxes
Send e-mail to Distribution List	Test send email to distribution group
Reply to an e-mail with a Distribution List	Test send email to distribution group
Reply to e-mail from migrated users	Test reply to email from migrated users
Reply to e-mail from external users	Test reply to email from external users
Non-migrated user reply to e-mail	Test non-migrated user reply to email
Non-migrated user reply to migrated user's email sent prior to migration	Test non-migrated user reply to migrated user's email sent prior to migration
Recover deleted item from the Recycle Bin	Test restore deleted items from Recover Deleted Items in Outlook
Email access with OWA	Test access email via OWA link in Outlook
Scan to e-mail	Test document scan and check email with attachment appears
Access migrated contacts (non-GAL)	Confirm non-GAL contacts and manual distribution lists are available in contacts
Access migrated tasks / to do list	Confirm migrated tasks / to do list available
CALENDARING	
Meetings have been migrated	Confirm scheduled calendar meetings display correctly
Book a meeting in a migrated meeting room	Test booking a meeting in a migrated meeting room
Book a migrated resource	Test booking of a non-meeting room resource
Meeting request can be accepted for an available meeting room	Auto reply acceptance from the migrated meeting room is received
Meeting request is not accepted for a pre-booked meeting room	Auto reply decline from the migrated meeting room is received
Remote booking agent is functional where appropriate	Test to ensure that systems work as expected
Migrated user can update pre-migration meetings with resources	Test making changes to bookings pre and post migration
Updated meeting requests notify all attendees	Test updated meeting request notifies all attendees
View user / room / equipment calendar	Confirm access to calendars is possible (no change post)
Global Address List present	Confirm able to access Global Address book when setting up online meetings
POLICY	



Rollback a migrated mailbox	Confirm ability to migrate mailbox back to 2010 platform
Email is not archived to QAM	Confirm email is no longer archived in QAM when mailbox is on 2016 platform
Litigation hold is enabled	Confirm litigation hold is applied to all migrated mailboxes
Deleted items recovery - 14 days	Test deleted mail items can be recovered
Email size limit - 35mb send and receive	Confirm send / receive limits are in place on 2016 platform
Mailbox storage limit - 2Gb for standard users	Confirm storage limits are in place on 2016 platform
Public folders are not enabled (access to 2010 folders are still possible)	Confirm that new public folder functionality is not available to use
MailMarshal functionality	Confirm that MailMarshal functionality is unaffected by the

