Increasing the capacity of our communities to engage with technology

Office 365 implementation considerations

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Infoxchange is a not for profit organization that has supported more than 100 non-profits to move to the Office 365 cloud including:
Agenda

1. What is Office 365
2. Office 365 benefits
3. Privacy and security
4. Exchange Online
5. SharePoint Online
6. Yammer, Skype for Business, One Drive
7. Mobility
8. Building the business case
9. Other resources
10. Questions
What is Office 365?
The full suite of Office 365

- Mail
- Calendar
- People
- Yammer
- OneDrive
- Sites
- CRM
- Tasks
- Word Online
- Excel Online
- PowerPoint Online
- OneNote Online
- Delve
- Video
- Office 365 Store
- Sway
- Power BI

My apps
What is Office 365 (E1 plan)?

» Professional email & shared calendaring, contacts (50 Gb / user)

» Instant messaging (IM), high definition video / audio conferencing and screen sharing

» Online storage (>1Tb), document management

» Collaboration tools, discussion

Note: We recommend that almost all non-profits also purchase Desktop Microsoft Office products from Connecting Up or Tech Soup (NZ)
For $6.38 per user per month, some organisations purchase E3 licenses to access:

- **Office Pro Plus** - Desktop licenses installed locally by each user on up to five devices using 'click to run'
- **mobile apps** – for advanced editing on Word, Excel & PowerPoint documents on your tablet
- **advanced email** – legal hold, archiving and unlimited storage
- **eDiscovery centre** – tools to support compliance. Search across SharePoint sites & Exchange
- **Business Intelligence** – create and manage interactive dashboards with multiple data sources.
What about privacy & security?

» Office 365 has recently moved to data centres in Melbourne and Sydney (currently in progress).

» Many large organisations and governments (including Qld government) use Office 365

» Its suitability depends on what information you intend to store and your funding agreements

» Strong security controls

» Strong privacy controls: ISO 27001, EU model clauses, HIPAA BAA & FISMA accredited

» You own and retain all rights to your data
Exchange Online
Thinking of implementing Exchange Online?

1. Audit your current infrastructure – do you need to upgrade internet, hardware or software?

2. Review your current users – what mailboxes, resources, distribution lists, public folders etc do you need?

3. Resource the technical and non technical components of a migration – does your current IT contractor have the expertise?

4. Consider change management, communication and engagement of key stakeholders.
Factors to plan your email migration

**Size**
- Large
- Medium
- Small

**Coexistence**
- Simple
- Rich

**User Provisioning**
- Directory Sync
- Manual/Bulk Import
- Automatic

**Source**
- Exchange
- IMAP
- Lotus Notes
- Google

**Identity management**
- On-premises
- Single sign-on
- On-cloud
# Summary of migration options

<table>
<thead>
<tr>
<th>Migration types</th>
<th>Suitability</th>
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<tbody>
<tr>
<td><strong>Outlook/client-based</strong></td>
<td>Small organisation (less than 30 PCs)</td>
</tr>
<tr>
<td>Manual but can be performed by users</td>
<td>Non technical staff or users can perform migration</td>
</tr>
<tr>
<td>Migration performance maximum 0.5 GB/h</td>
<td>Organisations using POP mail stored on each PC</td>
</tr>
<tr>
<td><strong>IMAP migration</strong></td>
<td>Organisations who don’t require calendars and contacts transferred.</td>
</tr>
<tr>
<td>Supports wide range of email platforms</td>
<td>Gmail or other non-Microsoft mail system</td>
</tr>
<tr>
<td>Email only (no calendar, contacts, or tasks)</td>
<td></td>
</tr>
<tr>
<td><strong>Cutover Exchange migration</strong></td>
<td>Automated migration from Exchange servers</td>
</tr>
<tr>
<td>Good for fast, cutover migrations (1 weekend)</td>
<td>Organisations with technical server expertise to configure synchronisation</td>
</tr>
<tr>
<td>Migration performance maximum 5-10 GB/h</td>
<td>No staging required (between 30 and 100 users)</td>
</tr>
<tr>
<td><strong>Staged Exchange migration</strong></td>
<td>For Exchange 2003 or Exchange 2007 only</td>
</tr>
<tr>
<td>Onboarding in groups (multiple weeks)</td>
<td>For staged over several weeks (over 100 users)</td>
</tr>
<tr>
<td>Requires Directory synchronisation with AD</td>
<td>Have a server for Directory Synchronisation</td>
</tr>
<tr>
<td><strong>Hybrid deployment</strong></td>
<td>Large organisations (over 100 users)</td>
</tr>
<tr>
<td>Long-term coexistence</td>
<td>Requiring a staged migration over several months</td>
</tr>
<tr>
<td>Enables cross-premises calendaring, smooth migration, and easy off-boarding</td>
<td>Have ongoing server capacity</td>
</tr>
<tr>
<td></td>
<td>Have strong security requirements for onsite mail</td>
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</table>
SharePoint Online
Previously SkyDrive Pro / OneDrive Pro

Also known as “Team Sites”

File storage – OneDrive & SharePoint

OneDrive for Business

SharePoint Online

- 1 TB Per User (free)
- Not Expandable
- Every file is “owned” by a user, not intended for shared files

- 10GB + .5gb per license (free), expandable ($)
- Store files, calendars, contacts, and more
- Data is centrally managed, intended for shared files

Files can be taken **Offline** with OneDrive Desktop Client
Thinking of implementing SharePoint?

1. What will you use it for – document management, projects, forms, team sites, collaboration?

2. Audit your current systems and information architecture

3. Assign people to lead and own the project – both IT and communications/admin staff

4. Consider the cultural implications of a more shared approach to information
Skype for Business Tips (previously Lync)

1. Review internet connections
2. Use Skype for Business 2013 (part of Office 2013 Pro Plus)
3. Use headsets for audio
4. Consider enabling external contact sharing
Yammer

1. Create groups for each team/topic
2. Use the desktop client
3. You can transfer from the free platform
4. Add a feed in your SharePoint site
5. Encourage CEO to post content
Mobility

1. Mobile apps for all devices
2. Office installed on up to 5 devices per user with e3 license
3. Mobile Device Management (MDM) recently released
4. Intune for full device management ($7.70)
Building the business case for Office 365

- **Reduce or eliminate server upgrades and refreshes** saving IT support and server costs
- **Use videoconferencing applications & teleworking structures** which provide flexibility and reduce travel costs
- **Defend against hardware failure** with cloud solutions so there’s no need to worry about your server failing and your data is protected in the cloud
- **Collaborate effectively** across all locations leading to increased efficiency
- **Create a single source of truth** for information which saves time looking for files in different locations
Top ten tips for successful implementation

1. Implement the *most valuable* areas of Office 365 *first* (often Exchange email & Skype for Business). Other areas such as SharePoint can come later.

2. Explain the *benefits* to staff & support them to make the change; local ‘champions’ can help staff to make the most of the new features.

3. Ensure your *internet bandwidth & reliability* is suitable, especially for video or syncing large files.

4. Consider *upgrading to Office 2016* on your PCs.

5. Use an *Office 365 expert* to make the transition a success, and to help with ongoing support if required.

….continued
Top ten tips for successful implementation

6. Review your security controls and policies.

7. Consider local storage if you share large videos or large quantities of photos.

8. Active Directory is good value for organisations with more computers.

9. Online collaboration spaces in SharePoint can be valuable for your Board or volunteers.

10. Yammer can be great for collaboration, particularly for larger organisations or external networks.
Additional Office 365 support available

» Office 365 readiness assessments
  offered in partnership with Connecting Up & TechSoup
  – NZ - https://www.techsoup.net.nz/office365

» Office 365 DIY workshops -
  http://www.connectingup.org/sphinxsearch/DIY%20workshop. Basic email, Basic SharePoint, Advanced email

» Additional ConnectingUp webinars including a practical demonstration

» Implementation services and migration advice

» Volunteer migrations for small organisations

» SharePoint configuration and development

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Questions and discussion.....

Infoxchange is a not-for-profit social enterprise dedicated to

Technology for Social Justice

Our objectives:
1. Increase Digital Inclusion by assisting all those in our communities to access and efficiently use ICT
2. Raise the level of Digital Proficiency and improve the efficiency and effectiveness of the community focused sector through Information and Communication Technology
3. Advocate for and showcase the benefits of Digital Empowerment in our communities

Our services for the sector include......
1. IT plans, assessments & IT strategy development
2. Office 365, website & intranet services
3. Cloud, infrastructure & desktop services
4. Client & case management and service co-ordination solutions
5. CRM for non-profits

Contact: mwalton@Infoxchange.org
Appendices
Office 365 resources— for more information

» Office 365 for nonprofits: www.microsoft.com/office365nonprofits

  (Click on the ‘Enterprise’ tab)

» Microsoft Office online training: https://support.office.com/en-us/article/Office-365-for-business-training-e990f8ff-56d7-450e-ad9f-74ae8718ef09

» Australian Privacy Principles

» New Zealand privacy guidance on cloud computing
  Microsoft’s answers:
  http://blogs.msdn.com/cfs-filesystemfile.ashx/_key/communityserver-components-postattachments/00-10-41-34-76/Standard-Response-to
  OPC-Cloud-Computing-Checklist-for-Office-365-2D00-24-April-2013.pdf

» The Microsoft Trust Centre – Privacy, Security & actual availability information

» ImproveIT - ImproveIT.org
  Resources to help your organisation get the most from your technology investment
Prepare your Office

Desktops and Laptops Operating Systems
» Windows 7
» Windows 8.1
» Or wait for Windows 10?
» Mac OS X 10.6

Browsers
» Internet Explorer 11 or greater
» Latest versions of Firefox or Chrome
» Safari 5 or greater

Office Versions
» Office 2013
» Office 2011 for Mac
» Office 2016 (recommended)
What happens when the internet goes down?

**Exchange (Email)**
- Can still access synced email
- May access new email via mobile devices or from alternate location

**OneDrive for Business**
- Can work on documents synced locally if OneDrive client is installed
- All changes-edits will be synced once internet connectivity is restored

**SharePoint**
- Continue to work with documents synced with OneDrive client
- Access documents via Office for Mobile or from alternate locations

**Office Applications**
- Installed Office applications will be available
- Office Web Apps will not be available
- Web apps on mobile devices will be available
Internet Bandwidth

An appropriate internet connection is important for Office 365. Internet speed can vary significantly depending on your distance from the exchange, connection type, contention ratio, whether other staff are watching training videos, etc. The information below is based on our experience and of a general nature - appropriate in most situations. Advice from an expert is recommended.

<table>
<thead>
<tr>
<th>Situation</th>
<th>Performance &amp; Comments</th>
</tr>
</thead>
</table>
| **Single user** at home on **consumer ADSL2** or 3G (OK signal) using  
  • e-mail, Lync (IM/audio/video), SharePoint & OneDrive for file sync | Generally good. Lync call reliability affected if downloading/uploading large files/emails |
| **Office of 10 people**, on **business grade ADSL2** using  
  • Email, Lync (instant messaging only) | Should perform appropriately |
| **Office of 10 people**, on **business grade ADSL2** with  
  • Email, Lync (IM & intermittent audio calls)  
  • Case/client management system in the Cloud  
  • One offsite office where people remote in to a local terminal server to use the finance/accounting package | Audio likely to drop out & Lync call reliability affected if downloading/uploading large files/emails or significant use of the Internet. |
| **Organisation of 30 staff**, 20 in central office, other 10 across 3 remote offices. Central has **symmetric 10Mb link**, others have business grade **ADSL2** with **Annex M** for improved upload. VPNs. QoS prioritisation  
  • e-mail, Lync (IM/audio/video), SharePoint & OneDrive for file sync  
  • Server for AD. Case/client management & Finance s/w in the cloud | Should perform appropriately  
  Without QoS (Quality of Service) network traffic prioritisation, risk of audio & video dropouts exist during periods of high internet traffic |
The different versions of Office……

Desktop software

Office
Standard 2013

Office
Professional Plus 2013

Cloud based (can also be used on desktop)

Office 365
# Minimum hardware specifications

<table>
<thead>
<tr>
<th>Area</th>
<th>Minimum suggested</th>
<th>Recommended</th>
</tr>
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<tbody>
<tr>
<td>Processor (CPU)</td>
<td>Dual Core 32bit (intel i5)</td>
<td>Quad Core 64bit (intel i5 7xx or above)</td>
</tr>
<tr>
<td>Memory (RAM)</td>
<td>4Gb</td>
<td>8Gb</td>
</tr>
<tr>
<td>Storage (HDD)</td>
<td>160Gb</td>
<td>160Gb</td>
</tr>
<tr>
<td>Display (screen)</td>
<td>1366 x 768</td>
<td>1680 x 1020</td>
</tr>
<tr>
<td>Browser</td>
<td>IE 10, Chrome</td>
<td>IE 11, Chrome</td>
</tr>
<tr>
<td>Network</td>
<td>LAN</td>
<td></td>
</tr>
<tr>
<td>Internet</td>
<td>ADSL 2, Cable or Fibre</td>
<td></td>
</tr>
<tr>
<td>Indicative costs (not including installation)</td>
<td>Desktop: $400-$800 Laptop: $500-$1000</td>
<td>Desktop: $750-$1000 Laptop: $750-$2000</td>
</tr>
</tbody>
</table>
Office 365

Benefit Pillars

Technology  Includes hardware and software savings as well as reduced IT effort. It also covers improved uptime, disaster recovery capabilities, and IT security.

Mobility  Considers how workers having anywhere anytime access to information and applications improves worker efficiency resulting in faster time to market,

Control & Compliance  Looks at lowering compliance cost and effort by using built-in industry standards and best practices.

Business Intelligence  Looks at opportunities to make better decisions through more timely access to data across multiple repositories. Reduction in decision times can lead to increased worker productivity.

Enterprise Social  Considers how collaboration has improved and business processes have been shortened by using social features built into Office 365 to improve communication.

Source: Forrester Research, Inc.
Project Staging

Stage 1 : Business Case and approval
Stage 2 : Review and scoping
Stage 3 : Prepare your environment
Stage 4 : Pilot and testing
Stage 5 : Email migration and Skype for Business
Stage 6 : SharePoint design and IA
Stage 7 : SharePoint build and launch
Stage 8 : OneDrive, Yammer and Video
Stage 9 : Business Intelligence / Power BI
Change Management

1. Engaging management
2. Finding champions
3. Pilot group
4. Training / Demo sessions
5. User documentation
6. Staged approach by team/department
7. Communication through staff meetings, Intranet, internal communications
8. Help area on Intranet