Agenda

1. Office 365 options and inclusions

2. Be clear on why you're using Office 365

3. Key considerations for each application in more detail (Exchange, SharePoint, Yammer, Skype)

4. Building the business case

5. Infrastructure considerations

6. Privacy and Security

7. Top tips for success

8. Other resources and questions

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The main non-profit Office 365 options

Business Essentials
& E1 - Donation

Office desktop applications:

- Excluded

Services:

Exchange   OneDrive   SharePoint   Skype for Business   MS Teams

Plus:
- Web versions of Word, Excel, etc
- 1 TB of OneDrive storage
- email, calendar & contacts (50 GB inbox)
- Online meetings, IM, audio, HD video, and web conferencing
- A hub for teamwork with Microsoft Teams
- Intranet (SharePoint)
- Corporate social network (Yammer)
- Planning & work mgt tools (Planner+)
- Digital storytelling tools (Sway)

Business Premium
$4.10/user/month

Limited to 300 users

Everything in Business Essentials, plus **Office desktop applications**

Word   Outlook   PowerPoint   Excel

OneNote   Access (PC only)   Publisher (PC only)

Plus:
- Desktop versions of Office applications: Word, Excel, PowerPoint, Outlook, and OneNote, plus Access and Publisher for PC only on up to 5 PCs or Macs per user
- Optimized Office experience on 5 tablets and 5 phones

Enterprise 3
$6.10/user/month

Everything in Business Premium, with *no limit to user numbers*, plus

- Self-service Business Intelligence to discover, analyze, and visualize data with Excel
- Compliance solutions to support Archiving, Auditing, eDiscovery, mailbox and internal site search, and legal hold capabilities depending upon subscription type
- Information Protection including Rights Management and Data Loss Prevention for emails
- Corporate video portal for uploading and sharing your in-house corporate videos
- Meeting broadcast on the Internet to up to 10,000 people
- Enterprise management of apps with Group Policy, Telemetry, Shared Computer

Reasons to choose the E3 plan

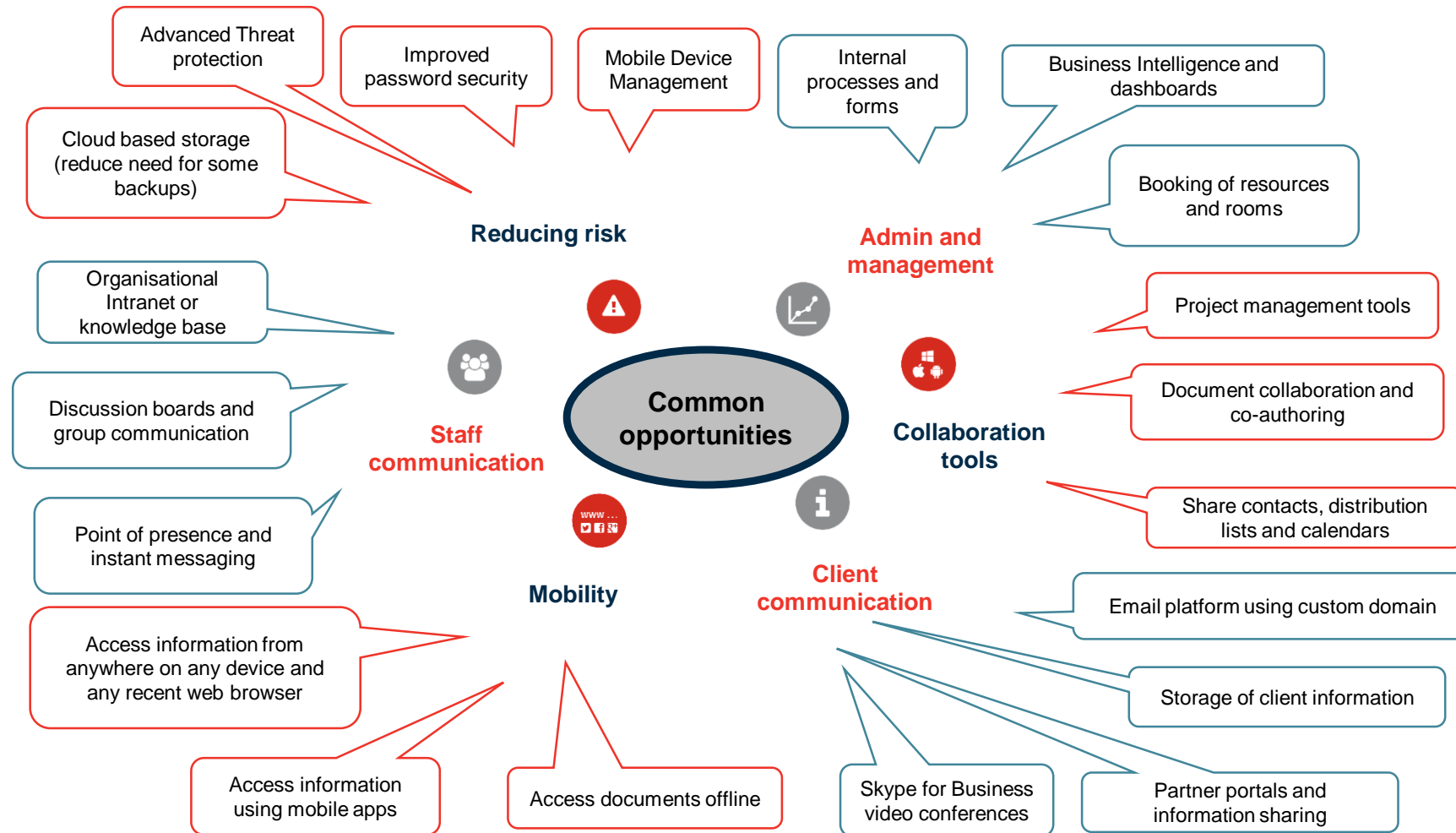For $6.10 per user per month, some organisations purchase E3 licenses to access:

» 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.

Office 2019 Standard (desktop version of Word, Excel etc) is also as available through Connecting Up/Tech Soup as a cost-effective once off purchase.

Why use Office 365? Reasons from from other non-profits

Advanced Threat protection

Improved password security

Mobile Device Management

Internal processes and forms

Business Intelligence and dashboards

Cloud based storage (reduce need for some backups)

Reducing risk

Admin and management

Booking of resources and rooms

Organisational Intranet or knowledge base

Project management tools

Common opportunities

Discussion boards and group communication

Staff communication

Collaboration tools

Document collaboration and co-authoring

Point of presence and instant messaging

Share contacts, distribution lists and calendars

Mobility

Client communication

Email platform using custom domain

Access information from anywhere on any device and any recent web browser

Storage of client information

Access information using mobile apps

Access documents offline

Skype for Business video conferences

Partner portals and information sharing

Which Office 365 application to choose?

Purpose	Application
Collaboration including document management for small teams	Teams
Discussion and Collaboration in groups	Yammer or Teams
Sharing and booking calendars, resources, rooms and equipment	Exchange Resources
Intranet and document collaboration for staff and/or boards	Teams/SharePoint
Business Intelligence and reporting	Power BI
Messaging / video conferencing	Teams/Skype for Business
Storage of individual's documents with some basic sharing functions	One Drive for Business
Forms, lists and basic databases	SharePoint
Accessing emails, calendars, contacts from mobiles	Outlook mobile app
Project Management	SharePoint or Office 365 Planner

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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

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Next steps for implementing Office 365

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Common Project Staging

1. Business Case and approval

2. Review, scoping and environment preparation

3. Pilot, demo and testing

4. Authentication implementation, internet upgrade

5. Email migration and Teams for instant messaging/conferencing, training

6. OneDrive, SharePoint or Teams design and information architecture

7. OneDrive, SharePoint or Team build and launch, change management and training

Also:

» OneDrive, Yammer and Video

» Business Intelligence / Power BI

» Telephony

» Planner

Summary of email migration options

Migration types	Suitability
Outlook/client-based Manual but can be performed by users Migration performance maximum 0.5 GB/h	Small organisation (less than 30 PCs) Non technical staff or users can perform migration Organisations using POP mail stored on each PC
IMAP migration Supports wide range of email platforms Email only (no calendar, contacts, or tasks)	Organisations who don't require calendars and contacts transferred. Gmail or other non-Microsoft mail system
Cutover Exchange migration Good for fast, cutover migrations (1 weekend) Migration performance maximum 5-10 GB/h	Automated migration from Exchange servers Organisations with technical server expertise to configure synchronisation No staging required (between 30 and 100 users)
Third party migration tools Good for hosted email servers (eg Telstra, gmail, external Exchange etc) Cost per user (eg $12 per user)	Unreliable servers not suitable for hybrid or cutover User friendly user interface Transfers mail, calendars, contacts etc No staging required
Hybrid deployment Long-term coexistence Enables cross-premises calendaring, smooth migration, and easy off-boarding	Large organisations (over 100 users) Requiring a staged migration over several months Have ongoing server capacity Have strong security requirements for onsite mail

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Audio / video conferencing & instant messaging: Teams/Skype for Business (previously Lync)
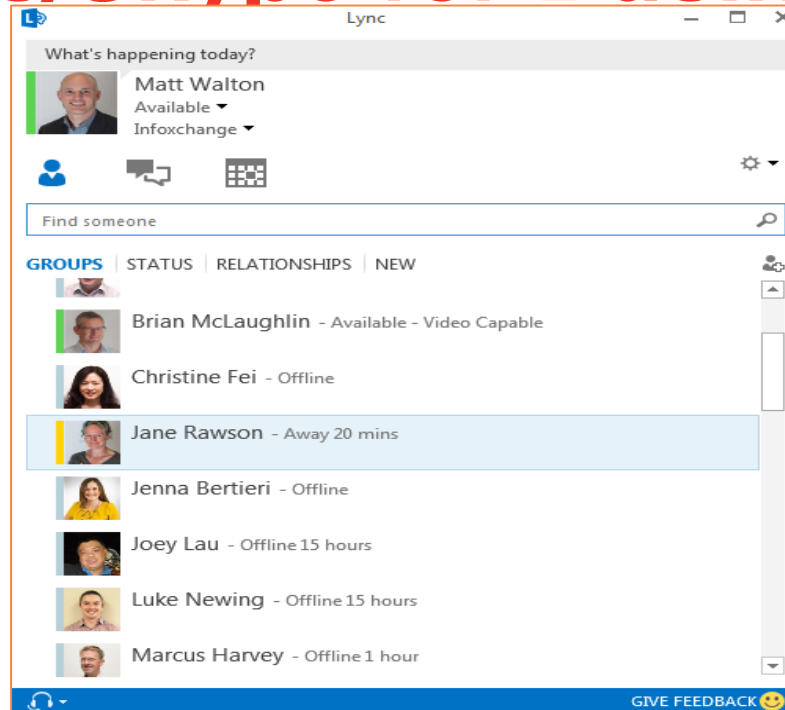
1. Review internet connections

2. Use headsets for audio

3. Consider enabling external contact sharing

4. Dial in conference number (PSTN) available with E5 licence

5. Now a viable option for telephony replacement (unified comms – with appropriate internet connection)
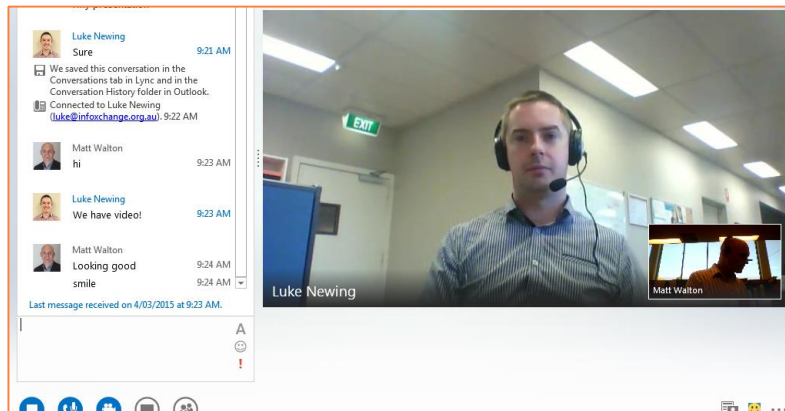
SharePoint Online
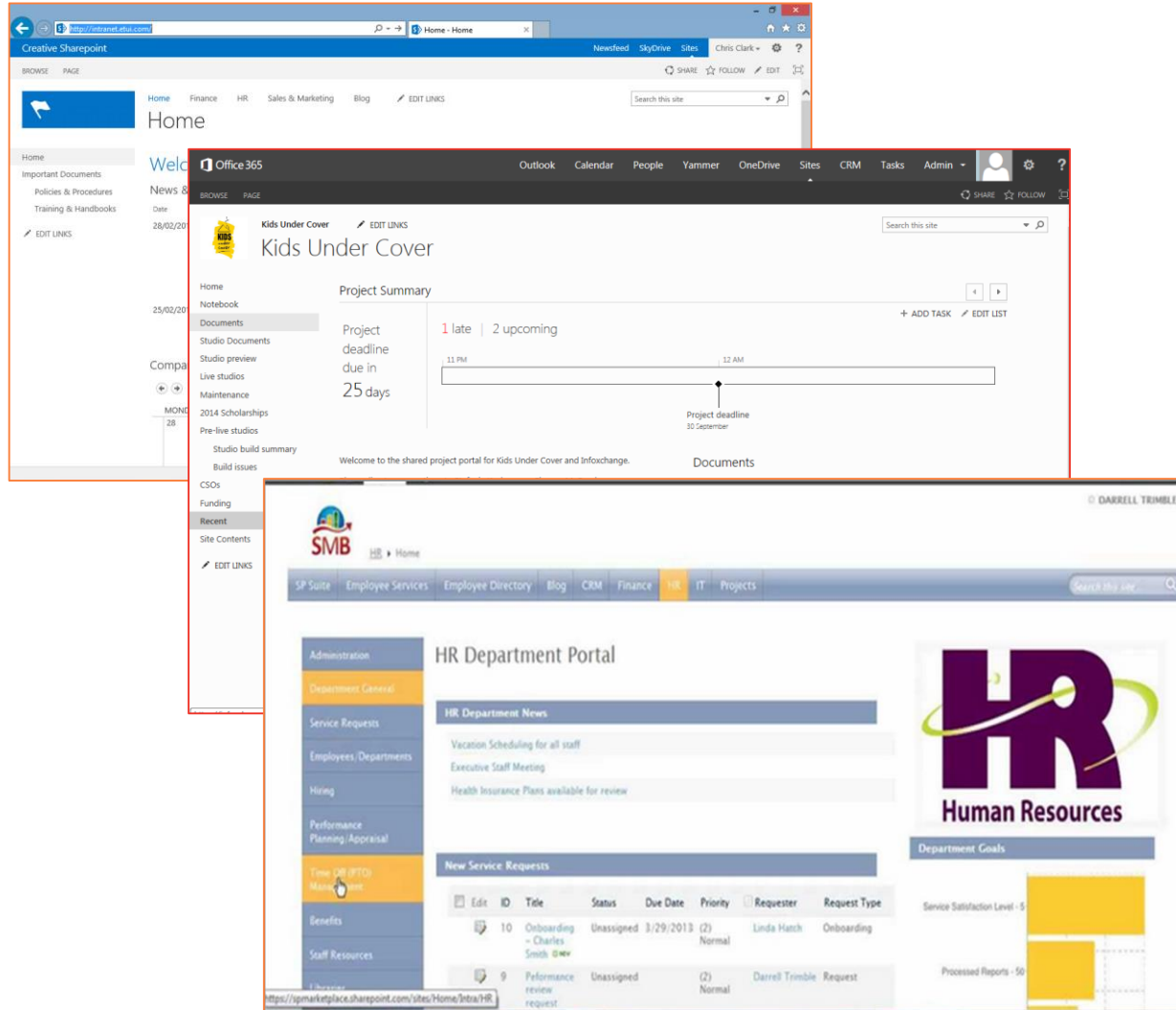
» Great for a company Intranet (large orgs)

» May be used as file server replacement (small orgs)

» Consider local storage for large files

» Forms and lists for admin processes

» Team /project sites for collaboration

» Consider change management /training

» Consider information architecture

» Use non technical staff

Teams

Brings key elements together for a team:

» Instant messaging

» Group Chat

» File Sharing

» Calendar

Has replaced Skype for new tenants

Infrastructure considerations

Training and change management

Phone System eg VOIP integration

Network and device management

Internet Connectivity

Remote internet connectivity Eg 4G

Data migration from existing systems

Mobile Device Management

Ongoing IT support

Mobile Devices

Tenant Admin and User management

Scanning and printing

Authentication eg Directory Synchronisation

PCs and Laptops eg Windows 10

Local server infrastructure

Office applications eg Office 2016

Local backups or offline files

Application integration

Office 2016

CRM integration

Emailing from applications

Internet Connectivity Scenarios

Example Scenarios		Performance & Comments
Single user at home on consumer ADSL2 or 3G (OK signal) using • e-mail, Skype (IM/audio/video), SharePoint & OneDrive for file sync	🟢	Generally good. Call reliability affected if downloading /uploading large files/emails
Office of 10 people, on business grade ADSL2 using • Email, Skype (instant messaging only)	🟢	Should perform appropriately
Office of 10 people, on business grade ADSL2 with • Email, Skype (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 & 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, Skype (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
Office of over 50 staff accessing cloud based applications and video conferencing Requires a symmetric connection of approximately 20mb upload and 20mb download. Fibre of 100mb may be also suitable and cost efficient if available at the location	🟠	Should provide a high quality connection enabling access to internet based applications

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Design for security from Day One

Office 365 allows staff to access to your information from anywhere with an internet connection. This can make it a target.

1. Assess your security culture – do staff
   - understand how to spot a phishing email?
   - Have strong, complex passwords
   - Understand your '*use of technology*' policy to keep your information safe?

2. Use the 50 free Enterprise Mobility & Security (EMS) E3 licences to enable risk-based reporting & monitor these regularly, consider Intune for mobile device management (part of EMS E3)

3. Consider rolling out multi-factor authentication for everyone.
   If this isn't viable, blocking sign-in to Office 365 from all countries except Australia, and deploy multi-factor authentication to high risk individuals (e.g. executive, IT administrators) as well as anyone who travels overseas.

Ten tips for successful implementation

1. Design for security from day one.

2. Azure Active Directory Domain Services with Windows 10 PCs is a great option for smaller organisations *'look mum, no server'* – although management capability is reduced & InTune should be learnt

3. Implement the most valuable areas of Office 365 first (often Exchange email & Teams/Skype for Business for audio/video conferencing). Other areas such as SharePoint and BI can come later.

4. Explain the benefits to staff & support them to make the change; local 'champions' can help staff to make the most of the new features and training.

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

Ten tips for successful implementation

6. Upgrade to Office 2016/2019 on your PCs.

7. Use an Office 365 expert to make the transition a success (particularly for data migration), and to help with ongoing support and training if required.

8. Consider local storage if you work with large videos, especially with poor connectivity.

9. Ensure each application that you implement has a clear purpose and it adds value to your staff and organisation.

10. Rollout in stages – don't try to do everything at once!

Additional Office 365 support available

» Office 365 readiness assessments, available through the Connecting Up & TechSoup websites

- AU - http://www.connectingup.org/office365
- 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

» SharePoint configuration and development

» Office 365 for non-profits Microsoft site: www.microsoft.com/office365nonprofits

Questions and discussion

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THANK YOU!