OFFICE 365

IMPLEMENTATION CONSIDERATIONS

Marcus Harvey – 16 Jan 19
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
The main non-profit Office 365 options

### Business Essentials & E1 - Donation

**Office desktop applications:**
- Excluded

**Services:**
- 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 mgmt tools (Planner+)
- Digital storytelling tools (Sway)

### Business Premium

*Limited to 300 users*

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

- Word
- Outlook
- PowerPoint
- Excel

**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 other non-profits

- **Reducing risk**
  - Advanced Threat protection
  - Improved password security
  - Mobile Device Management
  - Internal processes and forms

- **Admin and management**
  - Business Intelligence and dashboards
  - Booking of resources and rooms
  - Project management tools
  - Document collaboration and co-authoring

- **Collaboration tools**
  - Share contacts, distribution lists and calendars
  - Email platform using custom domain
  - Storage of client information

- **Client communication**
  - Skype for Business video conferences
  - Partner portals and information sharing

- **Mobility**
  - Access information from anywhere on any device and any recent web browser
  - Access documents offline
  - Access information using mobile apps

- **Staff communication**
  - Organisational Intranet or knowledge base
  - Discussion boards and group communication
  - Point of presence and instant messaging

- **Common opportunities**
  - Cloud based storage (reduce need for some backups)
  - Improved password security
  - Mobile Device Management
  - Internal processes and forms
  - Business Intelligence and dashboards
  - Booking of resources and rooms
  - Project management tools
  - Document collaboration and co-authoring
  - Share contacts, distribution lists and calendars
  - Email platform using custom domain
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Which Office 365 application to choose?

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

<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>Third party migration tools</strong></td>
<td>Unreliable servers not suitable for hybrid or cutover</td>
</tr>
<tr>
<td>Good for hosted email servers (eg Telstra, gmail, external Exchange etc)</td>
<td>User friendly user interface</td>
</tr>
<tr>
<td>Cost per user (eg $12 per user)</td>
<td>Transfers mail, calendars, contacts etc</td>
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<tr>
<td><strong>Hybrid deployment</strong></td>
<td>Large organisations (over 100 users)</td>
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<tr>
<td>Long-term coexistence</td>
<td>Requiring a staged migration over several months</td>
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<tr>
<td>Enables cross-premises calendaring, smooth migration, and easy off-boarding</td>
<td>Have ongoing server capacity</td>
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<tr>
<td></td>
<td>Have strong security requirements for onsite mail</td>
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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
- Mobile Device Management
- Mobile Devices
- Scanning and printing
- PCs and Laptops eg Windows 10
- Office applications eg Office 2016
- Local server infrastructure
- Authentication eg Directory Synchronisation
- Tenant Admin and User management
- Local backups or offline files
- Application integration
- Office 2016
- CRM integration
- Emailing from applications
- Ongoing IT support
- Data migration from existing systems
- Phone System
- Internet Connectivity
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# Internet Connectivity Scenarios

<table>
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<tr>
<th>Example Scenarios</th>
<th>Performance &amp; Comments</th>
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| 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 |
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