OFFICE 365
IMPLEMENTATION CONSIDERATIONS

Marcus Harvey – 16 Jul 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
Business Essentials & E1 - Donation

Limited to 2,000 users
Excluded: Office desktop apps
(often purchased through Connecting Up, e.g. $43 for Office Std)

Services
- Exchange
- OneDrive
- SharePoint
- Skype
- 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 mgmt tools (Planner+)
- Digital storytelling tools (Sway)

Also: Office 365 E1 volunteer: $2.70/u/m

Business Premium
$4.10/user/month

Limited to 300 users
Everything in Business Essentials, plus Office desktop applications

Services
- 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

Plus:
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Reasons to extend beyond E1

» Office Pro Plus - Desktop licenses installed locally by each user on up to five devices using ‘click to run’ – eliminating upgrade effort every few years

» 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
Other less commonly known options

Applications

Flow - Create workflows between your apps, files, and data to automate time-consuming tasks so you can focus on what's next.

Forms - Create surveys, quizzes, and polls in minutes. Send them to anyone and easily see results in real time.

Planner - Create new plans, organize and assign tasks, share files, chat about what you're working on, and get progress updates with Planner.

PowerApps - Build mobile and web apps with the data your organization already uses.

Stream - Share videos of classes, meetings, presentations, training sessions, or other videos with people in your company or school.

Yammer - Connect to the right people, share information across teams, and organize around projects with coworkers or classmates.

Power BI – Analyse your data & share insights

Services


Enterprise Mobility & Security E5: As above but stronger security controls, reporting and preventative analytics. $8.20/user/month

Office 365 E5 – All the features of E3 plus advanced security, analytics, and voice capabilities. $20.60/user/month

Plus all the standard applications on subscription – project, visio, etc.
Why use Office 365? Reasons from other non-profits

- Advanced Threat protection
- 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
- Storage of client information
- Teams for Business video conferences
- Partner portals and information sharing

Common opportunities

- Organisational Intranet or knowledge base
- Discussion boards and group communication
- Point of presence and instant messaging
- Access information from anywhere on any device and any recent web browser
- Access information using mobile apps
- Access documents offline

Mobility

Reducing risk

Admin and management

Collaboration tools

Staff communication

Client communication
Which Office 365 application to choose?

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Application</th>
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</thead>
<tbody>
<tr>
<td>Collaboration including document management for small teams</td>
<td>Teams</td>
</tr>
<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>
</tr>
<tr>
<td>Business Intelligence and reporting</td>
<td>Power BI</td>
</tr>
<tr>
<td>Messaging / video conferencing</td>
<td>Teams/Skype for Business</td>
</tr>
<tr>
<td>Storage of individual’s documents with some basic sharing functions</td>
<td>One Drive for Business</td>
</tr>
<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>
</tr>
<tr>
<td>Project Management</td>
<td>SharePoint or Office 365 Planner</td>
</tr>
</tbody>
</table>
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>
</tr>
</thead>
<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. Gmail or other non-Microsoft mail system</td>
</tr>
<tr>
<td>Supports wide range of email platforms</td>
<td></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>
</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>
</tr>
</tbody>
</table>
# Generational Preferences

<table>
<thead>
<tr>
<th></th>
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<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>In Person Meeting</td>
<td>![Always prefer]</td>
<td>![Mostly prefer]</td>
<td>![Somewhat prefer]</td>
<td>![Occasionally prefer]</td>
</tr>
<tr>
<td>Virtual Online Meeting (No Video)</td>
<td>![Occasionally prefer]</td>
<td>![Mostly prefer]</td>
<td>![Somewhat prefer]</td>
<td>![Occasionally prefer]</td>
</tr>
<tr>
<td>Virtual Online Meeting (Video)</td>
<td>![Occasionally prefer]</td>
<td>![Mostly prefer]</td>
<td>![Somewhat prefer]</td>
<td>![Occasionally prefer]</td>
</tr>
<tr>
<td>Email</td>
<td>![Always prefer]</td>
<td>![Always prefer]</td>
<td>![Always prefer]</td>
<td>![Always prefer]</td>
</tr>
<tr>
<td>Team Workspaces</td>
<td>![Occasionally prefer]</td>
<td>![Mostly prefer]</td>
<td>![Somewhat prefer]</td>
<td>![Occasionally prefer]</td>
</tr>
<tr>
<td>Instant Message (IM)</td>
<td>![Occasionally prefer]</td>
<td>![Mostly prefer]</td>
<td>![Somewhat prefer]</td>
<td>![Occasionally prefer]</td>
</tr>
<tr>
<td>Enterprise Social Networking</td>
<td>![Occasionally prefer]</td>
<td>![Mostly prefer]</td>
<td>![Somewhat prefer]</td>
<td>![Occasionally prefer]</td>
</tr>
<tr>
<td>Persistent Chat</td>
<td>![Occasionally prefer]</td>
<td>![Mostly prefer]</td>
<td>![Somewhat prefer]</td>
<td>![Occasionally prefer]</td>
</tr>
<tr>
<td>Conversational User Interfaces</td>
<td>![Occasionally prefer]</td>
<td>![Mostly prefer]</td>
<td>![Somewhat prefer]</td>
<td>![Occasionally prefer]</td>
</tr>
</tbody>
</table>

- **Always prefer**
- **Mostly prefer**
- **Somewhat prefer**
- **Occasionally prefer**
- **Do not prefer**
Teams

Brings key elements together for a team:

» Instant messaging
» Group Chat
» File Sharing
» Calendar

Has replaced Skype for new tenants
SharePoint Online

» Great for a company Intranet

» Can be used as file server replacement (not all file types supported)

» Consider local storage for large files

» Forms and lists for admin processes

» Consider change management /training

» Design your information architecture
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 2019
- Office 2016
- CRM integration
- Emailing from applications
- Application integration
- Local backups or offline files
- Local server infrastructure
- Tenant Admin and User management
- Authentication eg Directory Synchronisation
- Ongoing IT support
# Internet Connectivity Scenarios

<table>
<thead>
<tr>
<th>Example Scenarios</th>
<th>Performance &amp; Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single user at home on consumer ADSL2 or 3G (OK signal) using</td>
<td>Generally good. Call reliability affected if downloading/uploading large files/emails</td>
</tr>
<tr>
<td>• e-mail, Skype (IM/audio/video), SharePoint &amp; OneDrive for file sync</td>
<td></td>
</tr>
<tr>
<td>Office of 10 people, on business grade ADSL2 using</td>
<td>Should perform appropriately</td>
</tr>
<tr>
<td>• Email, Skype (instant messaging only)</td>
<td></td>
</tr>
<tr>
<td>Office of 10 people, on business grade ADSL2 with</td>
<td>Audio likely to drop out &amp; call reliability affected if downloading / uploading large files/emails or significant use of the Internet.</td>
</tr>
<tr>
<td>• Email, Skype (IM &amp; intermittent audio calls)</td>
<td></td>
</tr>
<tr>
<td>• Case/client management system in the Cloud</td>
<td></td>
</tr>
<tr>
<td>• One offsite office where people remote in to a local terminal server to use the</td>
<td></td>
</tr>
<tr>
<td>finance/accounting package</td>
<td></td>
</tr>
<tr>
<td>Organisation of 30 staff, 20 in central office, other 10 across 3 remote offices.</td>
<td>Should perform appropriately</td>
</tr>
<tr>
<td>Central has symmetric 10Mb link, others have business grade ADSL2 with Annex M for</td>
<td>Without QoS (Quality of Service) network traffic prioritisation, risk of audio &amp; video dropouts exist during periods of high internet traffic</td>
</tr>
<tr>
<td>improved upload. VPNs. QoS prioritisation</td>
<td></td>
</tr>
<tr>
<td>• e-mail, Skype (IM/audio/video), SharePoint &amp; OneDrive for file sync</td>
<td></td>
</tr>
<tr>
<td>• Server for AD. Case/client management &amp; Finance s/w in the cloud</td>
<td></td>
</tr>
<tr>
<td>Office of over 50 staff accessing cloud based applications and video conferencing</td>
<td>Should provide a high quality connection enabling access to internet based applications</td>
</tr>
<tr>
<td>Requires a symmetric connection of approximately 20mb upload and 20mb download.</td>
<td></td>
</tr>
<tr>
<td>Fibre of 100mb may be also suitable and cost efficient if available at the location</td>
<td></td>
</tr>
</tbody>
</table>
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 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
THANK YOU!