



IT Infrastructure Services

Office 365 Approach Paper

Amazing Possibilities ...



Executive Summary

The use of Office 365 across the globe is growing rapidly, driven by the intense sales focus of Microsoft and its business partners, along with a clear value proposition for organizations of all sizes. While the uptake of Exchange Online is leading the early growth charge, there are significant opportunities for organizations to leverage the many other components of Office 365 to reinvent productivity.

Office 365 offers a significant array of communication and collaboration services for organizations of all sizes. Once a firm has migrated to Office 365, it can take advantage of the frequent updates to the component services in Office 365, without the cost and complexity of managing on-premises infrastructure.

Migrating to Office 365 is a substantial undertaking for most firms, involving months of pre-migration learning, planning the roadmap, mitigating issues in current on-premises infrastructure, and the execution of the actual migration activities. For IT administrators who have not been involved in a previous migration to Office 365, there is a steep learning curve.

Microsoft offers technical capabilities to enable the migration to Exchange Online, but next to nothing for migrating to SharePoint Online and OneDrive for Business. Even its migration tools for Exchange Online are basic, have onerous pre-requisites, and require an uncommon depth of technical ability. Organizations migrating to Office 365 should evaluate the migration tools available from third-party vendors to streamline, simplify, and properly structure their migration activities across Exchange, SharePoint, and OneDrive.

Every organization operating under compliance requirements or who hold current email archives that need to be migrated without breaching archiving integrity should definitely get expert assistance from third-party migration vendors. The risk of being out of compliance, or breaking chain of custody in email archives is too high to do otherwise.

At Skillmine, we understand that when deploying a cloud-enabled business productivity environment such as Microsoft Office 365, it's equally important to support this new environment with flexible managed services that provide day-to-day management and maintenance.

Based on our extensive delivery expertise, follow-the sun workflows and consumption-based models, our services provide a single point of contact for all your Office 365 needs.

Enabling complete service accountability, our services:

- Provide high-quality technical and end-user Office 365 support with cloud-like scalability
- Utilize a team of certified consultants to provide end-to-end support, issue resolution and enhancements for your Office 365 deployments, including Exchange, SharePoint and Skype for Business (Lync)
- Offer vendor management and integration capabilities that enable a seamless Office 365 experience

Office 365 – Our Approach

Our in-depth expertise in Microsoft technologies and service integration management provides end-to-end support for incident remediation, as well as change and request management - without increasing IT costs. In addition, our service delivery model ensures continuously improving performance, increased availability and enhanced end-user satisfaction for cloud-enabled business applications.

We bring a wealth of experience deploying across any large, complex environment to small, agile organizations. With our proven delivery team, you can quickly realize your investments by leveraging our Services capabilities:

- ❑ On-Site, Centralized, and Hybrid Deployment Teams – Maximize your speed and cost of deployment
- ❑ A Variety of Deployment and Migration Offerings – Feasibility studies, Rich and Simple Coexistence, 3rd party systems
- ❑ Ongoing Support Offering – Managed services and support solutions by the same experts that deliver your migration
- ❑ Deep capabilities in foundational technologies for 365 enablement Networking, Security, Identity and Access, and Single Sign-on

STEP 1: FACE THE REALITIES OF MIGRATING TO OFFICE 365

Any organization with established business processes, current on-premises infrastructure, and historical data under management faces a significant planning exercise in evaluating the shift to Office 365, along with a set of discrete tasks in actually doing so. There are numerous critical decisions to make while planning the shift to Office 365 - including how to achieve value from doing so, the approach to take, whether to involve an external consultancy, and the selection of third-party migration tools.

The migration process itself requires the appropriate mindset, approach, and a set of technical skills, tools, and experiences that are not always readily available among an organization's current IT professionals - or as some early adopters have discovered, even among external IT consultancies. Getting it right is important: if the migration process doesn't work perfectly, staff won't have the ability to read and respond to email, schedule meetings and book resources, and assistants won't be able to manage their bosses calendar. Just thinking of Exchange at the moment, messaging is a mission-critical system for almost all organizations—so getting a migration right is critical.

STEP 2: MAKE FOR HOW YOU WILL USE OFFICE 365

Office 365 provides an array of capabilities for enabling communication, collaboration, and compliance for organizations. An early task to complete in evaluating the shift to Office 365 is how your organization will make use of the capabilities on offer. Aspects include:

- Whether to cherry-pick specific capabilities from Office 365 for use, such as Exchange Online or Exchange Online Archiving, or alternatively use most or all of the cloud services on offer.
- Deciding whether to embrace a hybrid approach to specific capabilities, where some services are provided from Office365 and complementary services are delivered through on-premises servers (for example, some Exchange mailboxes in Office 365 and others retained on-premises). A hybrid approach can be a short-term route for migrating to Office 365, or a long-term strategy for optimizing IT service delivery.
- Once staff have new capabilities available from Office 365, how will you lead staff to the effective use of these new tools in their work? Getting business value from Office 365 requires creating new approaches to business processes enabled by new tools that streamline current processes by removing inefficiencies, creating innovation, or introducing greater effectiveness.

In addition to deciding how to use Office 365, it is essential to know if there are other competing or complementary IT initiatives being undertaken at your organization that might impact the scope or timeline for a migration to Office 365, such as a refresh of end-user devices. Current litigation or in-progress evaluations of possible acquisition targets will also directly impact on the ability to move particular mailboxes to Exchange Online and your ability to migrate email archives.

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STEP 3: PROCURE THE OFFICE 365 PLAN THAT MAKES SENSE FOR YOUR ORGANIZATION

Microsoft offers a number of plans for Office 365, with increasing levels of capability and service coverage. An organization that wants to use a hybrid configuration between on-premises servers and Office 365 must select a plan that supports Azure Active Directory to enable administration tasks and seamless identity management between the two environments. Other considerations in selecting a plan includes:

- Organizations with a global footprint or strict data sovereignty requirements in some geographies need to decide between a single Office 365 tenant or the use of multiple tenants. While an organization can set up multiple cooperative tenants to comply with data sovereignty and address other practical issues, a multi-tenant approach comes with a range of complexities.
- Organizations with fluctuating staff numbers over the year could choose to forego the slightly cheaper plans that require an annual commitment and instead sign up for a plan that only requires a monthly commitment. This allows an organization to optimize its cost commitment to Microsoft, but does require active management to achieve.
- While most plans include the right to install the latest version of Microsoft Office applications on computers and mobile devices, some Office applications are excluded from this right. Visio Pro, Project Pro, and Power BI Pro for Office 365 are available at an additional cost over and above the base plan price.

STEP 4: COMPLETE PRE-MIGRATION CHECKS AND DEVELOP A MIGRATION PLAN

Delivering a seamless migration to Office 365 is pretty straight-forward once all the thinking work is done. As Microsoft says, most organizations will have to spend a lot more time planning their migration than actually putting it into practice. Here are the tasks to work through in checking your current environment and developing a plan for migrating to Office 365.

- Understand the Limitations in Office 365** - examples include migration throttling, maximum attachment sizes in Exchange Online, the default and maximum retention period for deleted items in Exchange, the length of filenames for upload to SharePoint Online or OneDrive for Business, blocked file types, and unsupported characters in file names.
- Check Bandwidth Availability** - Microsoft offers the option of delivering data on hard disks directly to Microsoft for upload into the customer's account at an Office 365 data center, and some third-party migration tools support faster upload to Office 365 by moving data into Azure first
- Review Bandwidth Design** - Bandwidth design for your entire organization is worth revisiting as well, in light of the pending migration to Office 365. If your organization does not currently have redundant network links, it may be worth introducing those since you will be relying on a cloud service for essential day-to-day systems.
- Assess Active Directory Health** - Hybrid approaches to Office 365 require flawless interaction between your Active Directory and Azure Active Directory. Assess the current health of your Active Directory setup, and resolve any issues
- Assess Exchange Server Health** - Before migrating from Exchange to Exchange Online, check the health of your current Exchange Server infrastructure. Any configuration problems, corruption, or other sub-performant aspects will either degrade your migration experience or be amplified after migrating to Exchange Online. For organizations shifting from a non-Exchange environment—such as IBM Notes/Domino, Novell GroupWise, or Zimbra—it is likewise important to ensure your current system has sufficient integrity to handle the demands of the pending migration.
- Assess SharePoint Server Health** - SharePoint is a comprehensive and complex product, and organizations who have taken advantage of its custom development capabilities are highly likely to need to re-think their approach to SharePoint when embracing SharePoint Online.
- Dependencies with Other Applications** - Find out which applications and systems rely on or work alongside your Exchange environment. If you are going to change your approach to Exchange by embracing Exchange Online, you will need to undertake remedial work to re-connect other systems.
- Availability of Skilled IT staff** - Evaluate the skills of current IT staff to execute the migration from on-premises infrastructure to cloud services, including their ability to backup and archive all relevant content.
- Assess Level of Staff Knowledge on Office 365** - If staff will be expected to use any of the new capabilities in their work, select the training resources and adoption strategies you will leverage to lead staff to effective use.
- Review Compliance Requirements** - Review current compliance requirements and evaluate how you will achieve these in Office 365.
- Review Data Privacy Requirements** - Check the data privacy requirements for data that would be stored in Office 365. Evaluate how Office 365 handles data that would be subject to privacy requirements (such as social security numbers and credit card numbers), and if the automatic encryption capabilities in Office 365 will be sufficient for your requirements. If not, a third-party add-on encryption service may be required

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- ❑ **Assess Firewall Architecture** - Review your current firewall architecture, as Office 365 requires certain firewall rules to be established.
- ❑ **Develop a Migration Plan** - Based on a solid understanding of the current state of your IT infrastructure, the business goals being pursued, and the way in which Office 365 will be leveraged to enable this pursuit
- ❑ **Develop a Backup and Recovery Plan** - Office 365 offers only rudimentary backup and recovery capabilities for customer use, such as the ability to retrieve a deleted mailbox item for up to 14 days through the Recoverable Items folder (this default can be increased to 30 days), and a way to retrieve a deleted user mailbox within 30 days of deletion. Various third-party vendors offer backup and recovery services that greatly extend what's on offer from Microsoft, adding an essential level for the management of corporate data.
- ❑ **Develop a Disaster Recovery/Business Continuity plan** - Evaluate the potential risks of losing access to Office 365 for your organization and assess how to mitigate these to ensure business continuity

STEP 5: MIGRATE TO OFFICE 365

Migrating to Office 365 is usually done across several phases, with organizations frequently shifting user mailboxes to Exchange Online first, then migrating other aspects of Exchange, and finally looking at the other capabilities

- **Migrating to Exchange Online** - Migrating to Exchange Online is an involved process, requiring a set of coordinated activities over several months or longer—depending on the size of your organization, and the volume of mailboxes and data to migrate. You will need to follow the steps below:
 - **Verify Connectivity to Exchange** - Verify connectivity from Exchange Online to your on-premises Exchange infrastructure.
 - **Pilot Test Your Migration** - Pilot test the efficacy of your preferred migration option, first using test accounts and mailboxes, and then migrating a small proportion of real user mailboxes.
 - **Select the Migration Option** - Select the migration option that makes most sense for your organization. Options from Microsoft include IMAP migration (for moving only messaging data from IMAP servers to Exchange Online), Cutover Migration (for small organizations who want to migrate all at once in one fell swoop to Exchange Online), and two migration options that support hybrid approaches. The hybrid approaches enable coexistence between on-premises Exchange and Exchange Online, either for the short-term over the duration of the migration, or as a long term strategy to optimize between the two approaches of providing Exchange services to organizations.
 - **Sync Active Directory and Assign Licenses** - For organizations taking a hybrid approach, the synchronization of Active Directory with Azure Active Directory is required because it creates the users in Office 365. Once they have been created, assign Office 365 licenses—such as the right to Exchange Online, SharePoint Online, and install Office2016 on computers and devices.
 - **Migrate Active User Mailboxes** - Start migrating active user mailboxes to Office 365, in light of available bandwidth and the data throttling Microsoft applies to migration activities. To stay within the limits imposed by Microsoft, many customers schedule a batch of a couple of hundred mailboxes to migrate each night.
 - **Address Unused Mailboxes** - Many organizations have unused mailboxes on Exchange Server that still contain messaging data, but for whom the user has long since departed.
 - **Migrate Public Folders, PST Files & Email Archives**
- **Migrating to SharePoint Online** - While Microsoft provides some tools for migrating to Exchange Online, it doesn't offer any valid approaches for migrating from SharePoint Server to SharePoint Online. There are a couple of manual ways that can be used for some aspects (moving documents into document libraries, usually without their associated metadata)
 - **Understand the Limitations** - SharePoint Online is not the same as SharePoint Server, and many of the design and customization options available for SharePoint Server are not available for SharePoint Online like customizations and any custom code applied to SharePoint Server internally, length of file names, disallowed or blocked characters in file and folder names etc.
 - **Archive or Delete Unnecessary Data**
 - **Get Single Sign-On Working**
 - **Decide On SharePoint Online Only or a Hybrid SharePoint Setup** - Like Exchange, hybrid configurations are supported between SharePoint Server and SharePoint Online.
 - **Migrate Site Collections, Sites, Libraries, and More** - Migrate the underlying building blocks of SharePoint to SharePoint Online—such as site collections, sites, libraries, and lists.

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- **Migrating to OneDrive for Business** - OneDrive for Business is the new home in Office 365 for personal work files and documents, providing employees with a cloud storage solution that can synchronize to their devices of choice, while giving the organization administrative oversight of these personal work files. Documents stored on file shares, corporate desktop and laptop computers, and other devices need to be migrated from their current location into OneDrive for Business or another new location in Office 365. The migration steps involved are:
 - **Delete or Archive What Doesn't Need to Be Migrated** - Documents that have no future value or are not subject to compliance regulations should be deleted or archived, instead of being migrated to Office 365
 - **Drag-and-Drop into OneDrive for Business** - After installing the synchronization client for OneDrive for Business, users should drag-and-drop the documents they own that are related to their work. Users can use the OneDrive for Business sync client to upload the folders and documents they create to Office365, making these available for personal use across devices and for sharing with other internal and external people in a lightweight collaborative situation.
 - **Migrate into SharePoint Online** - Many of the documents on a file share or computer hard drive should be put into a document library in a SharePoint Online site, not in an individual's OneDrive for Business folder. Documents related to a team project, department, initiative, or any other ongoing collaborative activity should be moved to the correct place in SharePoint Online. This restructuring of content from years or decades of working with a file share or local storage will be a significant undertaking for most organizations.

STEP 6: DRIVE EFFECTIVE USE AND ACHIEVE BUSINESS VALUE

Once you have migrated to Office 365, the ongoing challenge is to drive effective use and achieve business value through incorporating appropriate Office 365 capabilities into day-to-day work. An exhaustive treatment of driving effective use and achieving business value is beyond the scope of this step-by-step paper, but key aspects include:

- **Gaining Active Senior Executive Support** - Senior executives should be making use of appropriate Office 365 capabilities in their work, including sharing documents, managing executive meetings, and providing updates on organizational performance and direction through blogging or video briefings (using Office 365 Video). Provide mentoring to executives to help them through the transition to Office 365, as they will set a vital precedent for staff across the firm to do likewise.
- **Developing Departmental Champions** - Identify people across your organization who can become a local champion for the use of Office 365 in departmental activities. Provide special training opportunities for them to explore the possibilities with Office 365, as well as support for bringing new work activities to life in Office 365
- **Providing User Training** - Some organizations find their users do not need any training to take advantage of Office 365, and that is likely to be true when users have previously experienced similar systems at other organizations. However, if that is not true of your organization, then some user training to explain why Office 365 is being used and how it is best used by individuals and teams across your firm will go along way to aligning usage with intent.
- **Helping Users Overcome Problems** - Users will face problems in using Office 365, and will need help in addressing these in a timely manner. Whether it is getting Outlook to connect to Exchange Online, troubleshooting a synchronization problem in OneDrive for Business, or identifying when to use OneDrive for Business versus a SharePoint team site, left unaddressed these questions will derail the effectiveness of your deployment. Provide appropriate help channels to mitigate this risk.
- **Retiring Outdated Equipment** - In moving to Office 365 it is likely you now have excess and redundant servers on hand. Ensure they are properly decommissioned so you can cease future licensing payments.

Case Studies on Migrating to Office 365

Client is a leading retailer with a revenue of **250 Billion US\$**. The Company operates across 12 countries and employs more than 440,000 Workers.

Background and Business Need

The client planned to migrate its Active Directory, Exchange, Lync, SharePoint, online collaboration, and video conferencing to Office 365.

The client required services to help guide, manage, pilot and migrate these on-premise components to the cloud offerings packaged and provisioned on Office 365.

Solution

We worked collaboratively with the client leveraging Microsoft FastTrack, to setup, configure Office 365, define a migration strategy, and execute a successful migration. We offered a solution that would help the client to plan, pilot and coordinate the migration of these components:

- Exchange
- Skype for Business
- SharePoint

Benefits

- Reduced on-premises server maintenance
- Achieved 99.9% service level agreement (SLA) for availability
- Highly scalable environments with migration to the cloud
- Skype for Business integration provided seamless experience for users in conference room or users who dialed in remote
- Facilitated the evaluation of hybrid technology and new features with the migration of content to the new Office 365 SharePoint tenant

Technical Solution

Skillmine was selected as the client's strategic partner for this cloud migration initiative. As Office 365 would provide all of the client's required components on one platform, through the Software as a Service (SAAS) model, it was the client's top choice for implementation.

Success Stories- Global Automobile Manufacturer

Client

Client is a leading Global Automobile Manufacturer with a revenue of 250 Billion US\$. The Company operates across all global countries and employs more than 330,000 Workers.

Business Challenge

- Obsolete and non supportable End user Computing Equipment and Operating systems
- No End User Compute management and Automation system
- Legacy Email & Document management System
- Degraded Support levels and Huge cost on management of Legacy systems.

Skillmine Solution

- Upgradation of End user compute systems and operating systems across all locations of client in India in record time of 04 Months.
- Implementation of SCCM and other Automation tools for Endpoint Management
- Migration of User's from Lotus Notes to Microsoft Exchange and Microsoft SharePoint

Benefits

- Reduce overall maintenance and support costs .
- Unified Client Management with better SLA and customer satisfaction Levels.
- Scalable and stable Solution with Enhanced features and better user experience .
- Increase in overall user productivity.
- Overall improvement in Security posture of End user compute environment.



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Think & Care about Customer's Investment

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