CLOUD OFFICE – OFFICE 365 MIGRATION GUIDE

ONBOARDING

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INTRODUCTION

Many businesses deploy Office 365® on their own and expect things to go smoothly. But implementing a sprawling, complex collaboration and productivity tool like Office 365 without the right planning and expertise can be risky. Office 365 migrations not only call for all the normal migration best practices, they are complicated by the following factors:

- The mission-critical nature of the applications in the suite – A small blip in email or conferencing availability could have a huge impact on business operations.
- Office 365 comprises multiple apps in one suite, which means you could be migrating email, in addition to other data, during the upgrade.
- Limited support from Microsoft—a common complaint for those new to Office 365—makes it difficult to customize solutions and troubleshoot migration issues.

We know. Because we've overcome these obstacles and dozens more to help organizations deploy and optimize Office 365. Our expertise and outcomes in migrating and running thousands of Microsoft® environments has earned us the distinction of being the only five-time Microsoft Hosting Partner of Year. We hold Microsoft Gold Certifications in numerous specializations, including Cloud Productivity and Collaboration and Content. In this guide, we cover lessons we've learned along the way, including migration tips and solutions to ease your Office 365 transition.

IS OFFICE 365 WORTH THE MOVE?

Office 365 is the future of office productivity and collaboration tools. But the question facing each organization is—when is the time right for us to make the switch? Whether you opt for the big leap to the cloud or the hybrid deployment option, Office 365 can help your organization realize the following benefits:

Productivity Gains – Compatibility across platforms allows users to access files and documents from any device with anytime/anywhere access to work generated with Office 2016 products. The sharing

and collaboration features in Office 365 allow tracking of updates to documents and spreadsheets across an entire organization. When users can access and work on company documents from any device, from any location, they can connect the right people, ideas and information to be productive regardless of their location.

72%
of organizations using Office 365 reported increased collaboration. [1]

42%
of companies saw an increase in worker productivity due to Office 365 mobile features.[2]

30
minutes saved per day with better business intelligence with Office 365.[3]

Predictable & Manageable Costs – Migrating to the Office 2016 suite within Office 365 gives an organization the flexibility to scale up or down with a predictable cost structure. Pay for what you use, nothing more. The same applies to individual Client Access Licensing costs for Exchange, SharePoint or Skype for Business. Rather than committing to expensive licensing on long-term contracts with Microsoft, for those organizations that chose volume licensing agreements with Software Assurance from Microsoft, Office 365 offers a more flexible arrangement with a familiar cost structure.

ROI of **321%** compared to an on-premises deployment. [4]

Average **10%** reduction in legacy systems support, licensing and procurement costs using Office 365 vs. an on-premises Microsoft Office solution.[5]

Always Up-to-Date – Regardless of deployment type, Office 365 subscribers have access to the latest version of Office products with built-in, customizable security and privacy controls to help keep your data safe and accessible. In the past, access to new versions of Office involved the purchase of new licenses or the maintenance of Software Assurance agreements from Microsoft. Office 365 obviates the need for messy upgrades or maintenance packages solely for the purposes of maintaining current versions of Office, Exchange, SharePoint and other apps in the suite.

However, organizations may face hurdles when trying to get the full benefit of Office 365:

1. Limited resources and lack of in-house expertise to migrate and manage Office 365
2. Emergence of the remote workforce and required support to set up, secure and manage mobile devices
3. Poor support experiences with vendors or other providers
4. User adoption and feature utilization needed to realize the full potential of the suite
5. Customizing security and compliance controls as it relates to your company's security, privacy and compliance policies

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MAKING THE MOVE – WHO'S GOING TO MANAGE OFFICE 365?

Your first decision will be how to run Office 365. You have two main options – license via Microsoft and self-manage, or enlist a provider to handle licensing, configuration and daily operations for you. Here's a comparison of self-managing Office 365 against using a provider like Rackspace:

	Self-Managed	Rackspace Managed
Expertise	You implement (or hire someone to implement) Office 365 and address compatibility issues, constant changes and ongoing management needs yourself.	Access to over 250 specialists with over 1000 Microsoft certifications and the knowledge and support to ease ongoing management.
Daily Management	You handle navigating the Microsoft control panel, troubleshooting, potential outages, security and connectivity directly with Microsoft support.	Simplified Office 365 control panel and 24x7x365 front line support with escalated prioritizations as needed.
Migration	You handle migration planning and execution.	Office 365 migration experts help organize your transition and migrate your email data.
Configuration	You handle populating and updating user information and settings.	Answers to questions about setup and preconfigured encryption service available.
Optimization	You develop a deep level of understanding of the application in order to evolve it with your business.	Optional services for consultative help with ongoing strategy and optimization.

Security	You're responsible for applying needed security settings and managing tools for security and encryption.	Easily apply security settings such as email encryption from the Rackspace Control Panel.
Support	Limited support options.	Unlimited, 24x7x365 support.
Billing	Ongoing payments, long-term contracts.	Pay as you go, flexible billing.

MAKING THE MOVE – OFFICE 365 PRE-MIGRATION CHECKLIST

After you've determined how you'll manage Office 365, it's time to start preparing for migration.

1. Inventory your current environment

Your inventory should include:

- User accounts, login names and email addresses.
- Number and size of mailboxes (including shared mailboxes and conference rooms).
- Client versions and configurations (browsers, operating systems, office applications, mobile versions, and so on).
- Network settings (DNS hosts, proxy and/or firewall configuration, internet connectivity).
- File storage locations (file shares, intranet file storage)
- Intranet sites to be migrated.
- Online meeting and Instant Messaging systems to be migrated
- Critical integrations with mail-enabled programs, workflow systems, CRM and ecommerce applications.

2. Prepare data for migration

- Clean up active directory accounts using the Office 365 IdFix tool
- Get your data ready for a migration:
  - Clean up duplicate files.
  - The SharePoint Online library in Office 365 can only upload files up to 2 GB in size with base storage set at 500 MB per subscribed user, so plan accordingly.
  - Include solutions for archived email and data.
- Update client software versions. If you're running older software versions, you may need to update or manipulate data to move it into Office 365.
- Determine solutions to manage archiving and additional security if needed.

3. Make key deployment decisions

- Create a plan for creating, synchronizing and authenticating user accounts.
- Resolve any short or long-term integration with on-premises systems.
- Decide and plan for remote or network connectivity.
- Establish a plan to decommission disparate apps post-migration.

4. Communication and Educate

- Notify users and prepare training materials.
- Detail any changes in functionality, access and actions users need to take. Those items might include:
  - New interface and login for mailboxes
  - Mail client server settings and mobile setup
  - Mailbox password requirements
  - Mailbox storage size limits
  - Mailbox permissions
  - Collaboration processes
  - Spam filtering
  - Signature formatting

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Types of Office 365 Migrations:

- Cutover: Moves all the mailboxes and data in one operation
- Third party: Enlist a consultant or set of tools to perform the entire migration
- Assisted: Migration guided by the provider who will be responsible for the ongoing maintenance of the application suite

OFFICE 365 MIGRATION AND ONBOARDING AT RACKSPACE

Our Office 365 migration services include a team of migration specialists who onboard you as efficiently and painlessly as possible. With thousands of migrations under our belt, we can help you navigate the various components of the migration process. We currently offer two levels of migration services: a self-service migration offering and an assisted migration option.

Assisted Migrations

Our migration service is designed to aid businesses in need of a specialist to manage their entire email migration project. In order to reduce the amount of work involved for you, we provide all of the following with our assisted migration service:

- A Dedicated Migration Specialist available to you
- A two-pass migration plan that migrates mail, contacts and calendar data for mailboxes under 50GB each
- DNS guidance for the Going Live phase
- Email Client and Mobile Device setup for end users via one of our unique Rackspace tools

Your migration specialist works with you to help resolve any and all issues that may arise during the migration process. After your migration is complete, our Office 365 support team will be available for all future questions and assistance.

Phase	Activities
Planning	· Gather information about current environment · Discuss plan for migration: timeframe, scheduling, etc. · Add new mailboxes in control panel
Testing	· Create migration project · Test connectivity to source environment · Prepare for data migration of all mailboxes
Migrating	· Initiate migration (1st Pass) · Receive status updates for migration · Verify completion of migration
Go Live	· Update MX records for domain (contact DNS provider) · Verify MX records have been updated · Configure Autodiscover
Second Pass	· Initiate a 2nd migration to retrieve inconsistent email data after MX record change · Verify completion of 2nd pass migration
Post-Migration Check	· Provide email client and mobile device setup instructions · Ensure connectivity and test mail flow

Self-service Migrations

We provide you with a reliable, easy tool to start and finish the migration at your leisure. The free tool is housed within your Rackspace control panel. And if you have any questions, our migration experts are available to help.

WHAT IS MIGRATED VIA THE TOOL?

You can use this tool to migrate the following items, according to the supported system you're utilizing:

- **Microsoft Office 365**: Inbox, Folders, Emails, Contacts, Calendars, Tasks, Journals, Notes, Server-Side Rules, Folder Permissions, BCC Recipients
- **Exchange Server 2003 (Source Only)**: Inbox, Folders, Emails, Contacts, Calendars, Tasks, Journals, Notes
- **Exchange Server 2007+**: Inbox, Folders, Emails, Contacts, Calendars, Tasks, Journals, Notes, BCC Recipients
- **Exchange Server 2010 SP1+**: Inbox, Folders, Emails, Contacts, Calendars, Tasks, Journals, Notes, Server-Side Rules, Folder Permissions, BCC Recipients
- **Google Apps/Gmail:** Inbox, Folders/Labels, Emails, Contacts, Calendars
- **GroupWise 7+ (Source Only)**: Inbox, Folders, Emails, Contacts, Calendars, Tasks
- **Lotus Notes 6.5+ (Source Only)**: Inbox, Folders, Emails, Contacts, Calendars, Tasks
- **Zimbra 6+ (Source Only):** Inbox, Folders, Emails, Contacts, Calendars, Tasks
- **IMAP**: Inbox, Folders, Emails
- **POP (Source Only)**: Inbox, Emails
- **Open-Xchange**
- **Amazon S3**: Inbox, Folders, Emails, Contacts, Calendars, Tasks, Journals, Notes, Server-Side Rules

Migration path for non-email data

We will guide you through migrating all of your email data. If you have existing data in the following Office 365 applications, we're happy to discuss how you can create a migration plan.

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- SharePoint
- OneDrive
- Office 2016
- Skype for Business

A BETTER PATH TO OFFICE 365

For most businesses, an assisted migration offers the least disruption and best ROI for running Office 365 from migration through ongoing maintenance and troubleshooting. But, not every provider has the right expertise, support structure and infrastructure to run Office 365 in line with your business goals.

Rackspace Microsoft Certified Professionals have been helping customers overcome the complexity of adopting Microsoft technologies for more than 15 years. Across multiple clouds, Rackspace blends technology and automation with human expertise to deliver ongoing architecture, security and 24x7x365 operations support to help ensure you get the most out of your Microsoft investments. We migrate over 50,000 users each month and have seen just about every migration scenario — from small businesses with a few users to large businesses with thousands of users.
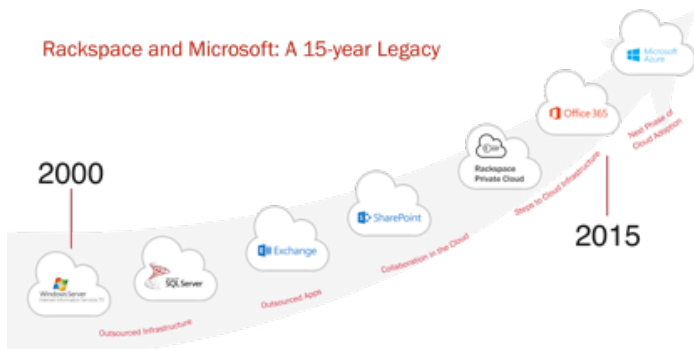
As the only five-time Microsoft Hosting Partner of the Year, we staff hundreds of Microsoft Certified Professionals and a global support team that manages and supports your Microsoft suite. From Microsoft cloud infrastructure to Office 365 solutions, to SQL database management and customized security and compliance support for your Microsoft clouds — we cover it all.

OFFICE 365 OPTIONS AT RACKSPACE

FANATICAL SUPPORT FOR OFFICE 365 Licensing + Fanatical Support	MANAGED SERVICES FOR OFFICE 365 Support and Advisory Services*

· Choice of 13 Office 365® licensing plans
· 24x7x365 live, US-based support via phone, chat and email
· No limit on the number of tickets and requests per month, and never any per-incident charges
· Free email migration, deployment assistance and daily troubleshooting for the entire suite
· Prioritized Microsoft support escalations
· Add-on security and compliance solutions like email encryption, email archiving and Microsoft® Azure™ Rights Management
	Fanatical Support® for Office 365, plus:
	· Proactive guidance and advisory services to include:
	  – Technical account manager and technical account reviews
	  – Training for new features
	  – Technical road map assistance
	· Ideal for large and complex Office 365 deployments
	· Available for Office 365 plans purchased from Rackspace, directly from Microsoft or from a third-party provider

CONTINUE THE CONVERSATION

To learn more about our Office 365 offering and migration services, contact a Rackspace Office 365 specialist today at 1–866–201–7852.

Or, explore more resources related to migrating and running Office 365:

- Maximize your Office 365 Investment: https://dab35129f0361dca3159-2fe04d8054667ffada6c4002813eccf0.ssl.cf1.rackcdn.com/

downloads/pdfs/office-365/Rackspace_Office-365-TCO-Whitepaper.pdf
- Office 365 Benefits Infographic: https://blog.rackspace.com/10-things-to-tell-your-customers-about-office-365
- Office 365 Options at Rackspace: https://www.rackspace.com/office-365/fanatical-support
- Self-Service Email Migration Demo: https://www.youtube.com/watch?v=QpkedvNJriE

FOOTNOTES

1. https://dab35129f0361dca3159-2fe04d8054667ffada6c4002813eccf0.ssl.cf1.rackcdn.com/downloads/pdfs/office-365/Rackspace_Office-365-TCO-Whitepaper.pdf

2. http://www.slideshare.net/Microsoft/tei-of-office-365-for-enterprise-customers

3. http://www.slideshare.net/whymsft/roi-of-office-365-forrestroioffice365forrestertotaleconomicimpact?ref=http://www.whymicrosoft.com/see-why-office-365-tei-study-forrester/

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ABOUT RACKSPACE

Rackspace, the #1 managed cloud company, helps businesses tap the power of cloud computing without the complexity and cost of managing it on their own. Rackspace engineers deliver specialized expertise, easy-to-use tools, and Fanatical Support® for leading technologies developed by AWS, Google, Microsoft, OpenStack, VMware and others. The company serves customers in 120 countries, including more than half of the FORTUNE 100. Rackspace was named a leader in the 2015 Gartner Magic Quadrant for Cloud-Enabled Managed Hosting, and has been honored by Fortune, Forbes, and others as one of the best companies to work for.

Learn more at www.rackspace.com or call us at **1-800-961-2888**.

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