

# Moving to Office 365

Planning and Migration Guide



**Matt Katzer**

Apress®

## Moving to Office 365: Planning and Migration Guide

Copyright © 2015 by Matt Katzer

This work is subject to copyright. All rights are reserved by the Publisher, whether the whole or part of the material is concerned, specifically the rights of translation, reprinting, reuse of illustrations, recitation, broadcasting, reproduction on microfilms or in any other physical way, and transmission or information storage and retrieval, electronic adaptation, computer software, or by similar or dissimilar methodology now known or hereafter developed. Exempted from this legal reservation are brief excerpts in connection with reviews or scholarly analysis or material supplied specifically for the purpose of being entered and executed on a computer system, for exclusive use by the purchaser of the work. Duplication of this publication or parts thereof is permitted only under the provisions of the Copyright Law of the Publisher's location, in its current version, and permission for use must always be obtained from Springer. Permissions for use may be obtained through RightsLink at the Copyright Clearance Center. Violations are liable to prosecution under the respective Copyright Law.

ISBN-13 (pbk): 978-1-4842-1198-4

ISBN-13 (electronic): 978-1-4842-1197-7

Trademarked names, logos, and images may appear in this book. Rather than use a trademark symbol with every occurrence of a trademarked name, logo, or image we use the names, logos, and images only in an editorial fashion and to the benefit of the trademark owner, with no intention of infringement of the trademark.

The use in this publication of trade names, trademarks, service marks, and similar terms, even if they are not identified as such, is not to be taken as an expression of opinion as to whether or not they are subject to proprietary rights.

While the advice and information in this book are believed to be true and accurate at the date of publication, neither the authors nor the editors nor the publisher can accept any legal responsibility for any errors or omissions that may be made. The publisher makes no warranty, express or implied, with respect to the material contained herein.

Managing Director: Welmoed Spahr

Lead Editor: Gwenan Spearing

Development Editor: Douglas Pundick

Editorial Board: Steve Anglin, Louise Corrigan, Jim DeWolf, Jonathan Gennick, Robert Hutchinson,

Michelle Lowman, James Markham, Susan McDermott, Matthew Moodie, Jeff Olson, Jeffrey Pepper,

Douglas Pundick, Ben Renow-Clarke, Gwenan Spearing, Steve Weiss

Coordinating Editor: Melissa Maldonado

Copy Editor: Kimberly Burton

Compositor: SPi Global

Indexer: SPi Global

Artist: SPi Global

Distributed to the book trade worldwide by Springer Science+Business Media New York, 233 Spring Street, 6th Floor, New York, NY 10013. Phone 1-800-SPRINGER, fax (201) 348-4505, e-mail [orders-ny@springer-sbm.com](mailto:orders-ny@springer-sbm.com), or visit [www.springer.com](http://www.springer.com). Apress Media, LLC is a California LLC and the sole member (owner) is Springer Science + Business Media Finance Inc (SSBM Finance Inc). SSBM Finance Inc is a Delaware corporation.

For information on translations, please e-mail [rights@apress.com](mailto:rights@apress.com), or visit [www.apress.com](http://www.apress.com).

Apress and friends of ED books may be purchased in bulk for academic, corporate, or promotional use. eBook versions and licenses are also available for most titles. For more information, reference our Special Bulk Sales—eBook Licensing web page at [www.apress.com/bulk-sales](http://www.apress.com/bulk-sales).

Any source code or other supplementary material referenced by the author in this text is available to readers at [www.apress.com](http://www.apress.com). For detailed information about how to locate your book's source code, go to [www.apress.com/source-code/](http://www.apress.com/source-code/).

# Contents at a Glance

<b>About the Author .....</b>	<b>xiii</b>
<b>About the Technical Reviewers .....</b>	<b>xv</b>
<b>Acknowledgments .....</b>	<b>xvii</b>
<b>Introduction .....</b>	<b>xix</b>
<b>■ Chapter 1: Why Office 365 .....</b>	<b>1</b>
<b>■ Chapter 2: Understanding the End User Experience Using Office 365 .....</b>	<b>27</b>
<b>■ Chapter 3: Office 365: The Apps .....</b>	<b>65</b>
<b>■ Chapter 4: Security Best Practices .....</b>	<b>95</b>
<b>■ Chapter 5: Deployment Step by Step .....</b>	<b>121</b>
<b>■ Chapter 6: Workstation Setup Configuration for Office 365 .....</b>	<b>201</b>
<b>■ Chapter 7: Managing Your Office 365 Deployment .....</b>	<b>255</b>
<b>■ Chapter 8: Glossary .....</b>	<b>349</b>
<b>Index .....</b>	<b>357</b>



# Contents

<b>About the Author .....</b>	<b>xiii</b>
<b>About the Technical Reviewers .....</b>	<b>xv</b>
<b>Acknowledgments .....</b>	<b>xvii</b>
<b>Introduction .....</b>	<b>xix</b>
<b>■ Chapter 1: Why Office 365 .....</b>	<b>1</b>
Office 365: The New Cloud Challenge .....	2
Customer Segments .....	3
RDCC's IT Requirements.....	7
Strategic Overview .....	7
On-Premises and Cloud Resource Requirements.....	8
More RDCC IT Issues .....	10
RDCC Cloud Solution .....	18
Cloud Requirements .....	19
Office 365 Business Savings for RDCC.....	19
Summary of RDCC On-Premises Requirements .....	19
Migration Cost and Approaches.....	20
The Big Decision: On-Premises or Cloud Solutions? .....	21
Next Steps for RDCC.....	24
Summary.....	25
Next Steps.....	25
<b>■ Chapter 2: Understanding the End User Experience Using Office 365.....</b>	<b>27</b>
A Day in the Life of an Office 365 User.....	28
Where to Start with Office 365? A Hands-on Tutorial.....	29

Logging in to Office 365 .....	30
Accessing Outlook Web Application (OWA).....	33
Setting Outlook Options.....	35
OneDrive for Business: Overview .....	38
Document Collaboration.....	40
Office 365 Delve Configuration.....	43
Office 365 Yammer Configuration.....	44
Accessing the SharePoint Team Site.....	46
Office 365 Team Site: “FastTrack” .....	47
Office 365 Team Site: “Contoso” .....	49
Office 365 Desktop Tools.....	50
Using Skype for Business.....	55
Data Loss Prevention.....	57
Device Configuration .....	58
Office 365 and Enterprise Mobility Suite.....	59
Microsoft Intune .....	62
Summary.....	63
Reference Links .....	63
Next Steps.....	64
<b>■ Chapter 3: Office 365: The Apps .....</b>	<b>65</b>
It Is All About the Apps! .....	65
Where to Start?.....	67
Using Excel Online to Collaborate.....	68
Editing Excel files in Office 365 .....	74
Verify That Sharing Is Enabled.....	75
Preventing OneDrive for Business Data from Being Shared.....	77
Protecting Data That Is Shared.....	77
Office 365 Word, PowerPoint, and OneNote.....	78

Collaborating with Outlook Web Access .....	80
Collaborating with Skype for Business .....	81
<b>Business Management Tools.....</b>	<b>86</b>
Delve.....	86
Power BI .....	88
MS Account: Setup and Configuration .....	90
Summary.....	93
Reference Links .....	93
Next Steps.....	94
<b>■ Chapter 4: Security Best Practices.....</b>	<b>95</b>
A Step Back in Time .....	97
What Is Single-User Identity?.....	98
Looking at Employees and Their Use of Business Services .....	99
How Does Single Identity Work? .....	100
Single-User Identity vs. Device Management .....	101
How Can Single-User Identity Help Manage IT Resources? .....	104
Cloud Identity and Single-User Identity.....	106
Data Governance Concepts .....	107
Immutability.....	108
Audit Policy.....	109
Information Immutability .....	112
Office 365 Archiving and Retention .....	112
Data Loss Prevention.....	115
Overview of Office 365 Compliance and Discovery.....	117
Compliance Settings.....	118
Summary.....	119
Reference Links .....	119
Next Steps.....	120

■ **Chapter 5: Deployment Step by Step** ..... **121**

**Purchasing Office 365** ..... **121**

**Configuring Office 365** ..... **125**

        Step 1: Purchase Your Office 365 Services..... 126

        Step 2: Validate Your Domain(s) to Microsoft and Add DNS Records ..... 129

        Step 3: Configure Skype for Business (S4B)..... 141

        Step 4: Configure Yammer Enterprise for Office 365..... 144

        Step 5: Linking Office 365 into Azure Active Directory and Intune (Paid Subscriptions Only) ..... 146

        Step 6: Load Users and Assign Licenses or Use Federation/Azure AD Connect ..... 150

        Step 7: Install Directory Synchronization/Azure AD Connect (Optional) ..... 153

        Step 8: Manually Installing PowerShell (Optional) ..... 156

        Step 9: Migrate E-mail ..... 158

        Step 10: Set Mail Flow ..... 162

        Step 11: Configure Desktop and Mobile Devices ..... 165

        Step 12: Configure External Devices ..... 167

        Step 13: Cleanup ..... 167

**Final Check List**..... **168**

        Test Group or Staged Migration ..... 170

**DNS Trouble Shooting**..... **172**

        Onboarding Users ..... 173

        Bulk-loading Users Through Azure AD Connect..... 174

        Manually Bulk-Loading Users..... 175

**Onboarding E-mail** ..... **179**

        PST Mail Migration to Office 365..... 179

        Migrating E-mail with BitTitan’s MigrationWiz ..... 183

        Using the Microsoft Office 365 Migration Tool..... 194

**Summary**..... **198**

**Reference Links** ..... **198**

**Next Steps**..... **198**

<b>■ Chapter 6: Workstation Setup Configuration for Office 365 .....</b>	<b>201</b>
Office 365 Subscription Overview .....	201
Different Versions of Office Software .....	204
Installing Office 365 Software .....	205
Configuring Office 2016 .....	208
Step 1: Start Outlook and Create a New Profile.....	208
Step 2: Enter Your Name and E-mail Address.....	209
Step 3: Verify the Office 365 Connection .....	209
Step 4: Configuring OneDrive for Business.....	210
Step 5: Configuring Skype for Business .....	215
Step 6: Configuring Smartphones and Tablets.....	219
Setup Summary .....	225
<b>OneDrive for Business: Planning for Personal and Team Site Document Storage.....</b>	<b>226</b>
Step 1: Office 365 OneDrive for Business Configuration .....	227
Step 2: Add OneDrive for Business to Your Desktop .....	229
Step 3: Launch OneDrive for Business on Your Local System .....	230
OneDrive for Business Configuration.....	230
OneDrive: Checking Storage Allocation .....	231
<b>Skype for Business: Manual Configuration.....</b>	<b>232</b>
<b>Office 365 Encryption .....</b>	<b>233</b>
<b>Office 2007/2010: Desktop Setup Configuration .....</b>	<b>240</b>
<b>Outlook 2007/2010/2013: Manual Configuration for Office 365.....</b>	<b>243</b>
Step 1: Run the PowerShell Command to Retrieve the ExchangeGuid Server ID .....	244
Step 2: Configuration of Outlook.....	244
<b>Setting Outlook to Prompt for a Profile .....</b>	<b>250</b>
Step 1: Select the Control Panel .....	251
Step 2: Select Mail 2016 and Configure Profile .....	251
Step 3: Set the Profile Option to Prompt.....	251

Summary .....	252
Reference Links .....	253
Next Steps .....	253
<b>■ Chapter 7: Managing Your Office 365 Deployment .....</b>	<b>255</b>
Office 365 Administration Overview .....	255
Preparing to Administer Office 365 .....	258
Final Checklist .....	258
Common Office 365 Administration Tasks.....	260
Office 365 Administration Center .....	263
Administrator Roles .....	266
Config: Adding, Deleting, and Restoring Users.....	268
Users: Renaming.....	276
Billing: Adding/Changing and Decreasing Licenses.....	278
Config: Password Expiration .....	280
Config: Password Multi-Factor Authentication .....	282
Config: Groups (Office 365 and Security Groups) .....	287
Partner Administrators.....	290
Config: External Sharing .....	291
Config: Domains.....	294
Exchange Admin Center .....	296
Exchange Administration Roles .....	297
Default User Role Defined.....	299
Exchange: Conference Room, Configuration.....	302
Exchange: Conference Room, PowerShell Modification .....	305
Exchange: Adding an Alias E-mail Address to a User .....	305
Exchange: Changing a User E-mail Account Primary Domain .....	306
Exchange: Adding Shared Mailbox .....	307
Exchange: Adding a Distribution Group .....	309
Exchange: Using Alias to Send to/Receive from E-mail.....	312
Smartphone Management from Exchange .....	318

<b>Skype for Business: Administration</b> .....	<b>319</b>
Skype for Business: Federation .....	320
Skype for Business: Voice.....	320
Skype for Business: Conferencing Add-on .....	328
Yammer .....	328
<b>OneDrive for Business</b> .....	<b>329</b>
<b>PowerShell</b> .....	<b>330</b>
PowerShell: Setting Up for Skype for Business and SharePoint.....	333
PowerShell: Using the Standard Header for MS Online Services and Exchange.....	334
Cloud Solution Provider: Office 365 .....	339
Nuvolex: Managing Office 365.....	340
Troubleshooting: Autodiscover.....	343
Troubleshooting: Creating a Bootable USB Stick .....	344
<b>Summary</b> .....	<b>346</b>
<b>Reference Links</b> .....	<b>346</b>
<b>Next Steps</b> .....	<b>347</b>
<b>■ Chapter 8: Glossary</b> .....	<b>349</b>
<b>Index</b> .....	<b>357</b>



# About the Author



**Matt Katzer** is the president of KAMIND IT, a Microsoft Gold Partner, and author of the best-selling cloud book *Office 365: Managing and Migrating Your Business in the Cloud* (Apress, 2013). He is currently the president of the local chapter of IAMCP (International Association of Microsoft Channel Partners) and active in local business communities.

Matt's focus with cloud solutions started in 2008, as he was looking at ways that businesses could grow quickly and with reduced operating costs. Matt holds a BSEE from the University of Michigan and an Executive MBA from the University of Oregon.

Matt's greatest satisfaction comes from helping his customers become competitive in an increasingly technology-driven world.



# About the Technical Reviewers

We at KAMIND IT have taken a different approach to the technical review of this book. This book is a collection of “notes from the field”—documents that we have generated to help us educate our customers as we partner with them to move to Microsoft Office 365, a cloud service that simply works. These chapters are a collection of the experiences of more than 8,200 users as they migrated to Office 365. Their tireless feedback and the questions from our customers have helped us hone this book to be a practical reference document, not only for moving to Office 365, but also as a tool to manage businesses on Office 365.



# Acknowledgments

I want to thank all of my customers; my editor, Gwenan Spearing; Robyn Schutz, our Microsoft Business Development Manager; Eugene Chi, General Manager SMB West Region and the countless support staff at Microsoft; my team at KAMIND IT who allowed me the time to write this book, especially Hakim Spears and David Tollefsen for their reviews of the chapters, helping to improve the final product; Brian Geraths, photographer extraordinaire; and last but by no means least, my wife, Barbara, for her encouragement and support. Without the assistance of all these individuals and companies, this book would never have been written.

Each of the chapters includes additional information culled from various blogs and Internet postings, to assist readers in searching out information on Office 365 and Microsoft's other cloud services.



# Introduction

Why Office 365 and why this book? The answer is simple: for me it has always been about giving back to the community. Office 365 users are a community. It is important for those who are passionate about Office 365 to help the community grow. This Office 365 book is a combination of my experiences and questions that I am constantly being asked about moving customers to Office 365. Customers who move to Office 365 improve their productivity and reduce operation costs. Why use Office 365? It just makes business sense. It is about what people want to do, and how they work.

Office 365 is a cloud-based service; using it is what you know—the Microsoft Office suite. It simply works, plus you do not have to give up your intellectual property to use the service. This is important. Not all cloud solutions are this forthright. Our customers who use Office 365 have significantly reduced their IT services costs and their concerns in the areas of data security, compliance, and discovery.

This is a living book. We approached Apress, our publisher, with the idea that this book should morph over time. We suggested that a living book could be created about Microsoft cloud services, based on our experience both now and in the future. Apress agreed.

KAMIND IT, a Microsoft Cloud Solution Provider and Cloud Champion and a multiyear Microsoft Partner award winner, presents a unique value proposition for our Office 365 customers. Our approach has been to partner with our clients to journey to the cloud together. That experience is reflected in this book and will continue to be.

Join us in this journey to the cloud with Office 365.

## Chapter 1: What Is Office 365?

This chapter focuses on why you should move your organization to Office 365. The decision to move to Office 365 is a business, rather than a technical, decision. Like any business change, the objective is to reduce your operational costs and to improve your organization's productivity to gain a competitive advantage. The chapter ends with a hypothetical customer making the business trade-offs toward moving to the cloud.

## Chapter 2: Understanding the End User Experience

The best way to understand Office 365 is to experience it. You explore Office 365 capabilities in the Contoso demonstration site, with a focus on how this helps your business productivity. A day in the life of a user demonstrates the capabilities of Office 365.

## Chapter 3: The Apps

Office 365 is owned by the business, and the data is only available to the business for business use. Office 365 takes advantage of social enterprise through the different data mining capabilities that are present in services like Gmail, Dropbox, Facebook, LinkedIn, and other social media sites. These capabilities are applied to your Office 365 site to improve your business productivity. This chapter describes Office 365 apps and discusses how you use them in your business to improve communications and productivity.

## Chapter 4: Cloud Security Best Practices

One of the issues that all managers are faced with is the management of data and security and learning best practices. In this chapter, you explore the different capabilities of Office 365 and the monitoring that is in place to manage your Office 365 company to ensure that your data remains private. This chapter covers the most common approaches to Office 365 migration.

## Chapter 5: Office 365 Deployment Step by Step

The secret to a successful deployment to Office 365 is picking the correct plan that supports your business. The key to a successful migration to Office 365 is the planning and purchase process. Once you select a plan, your primary consideration must be to ensure that the migration process is seamless for your organization. This chapter describes the basic purchase information and it details the choices. It concludes with information about pre-deployment, deployment, and post-deployment.

## Chapter 6: Workstation Setup and Configuration

Office 365 supports many different systems and capabilities, depending on your business needs. The issue that IT managers constantly face is how to set up and manage the client environment. This chapter is focused on the configuration of an Office 365 desktop environment. This is the go-to reference chapter on the configuration of your desktop and mobile phones.

## Chapter 7: Managing Office 365

This chapter describes the different administration centers in Office 365 and the most common tools that you use to administer Office 365. Depending on your Office 365 plan, there are five possible administration tools. This chapter focuses on the Office 365, Exchange, and Skype for Business administration centers. The chapter closes with using PowerShell to manage your Office 365 environment.

## CHAPTER 2

# Understanding the End User Experience Using Office 365

Office 365 is scalable for all businesses. An Office 365 subscription can be created for 1 user or 100,000 users. Office 365 is the only service that allows any business to have the same capabilities as a Fortune 100 company, at a low monthly subscription. As a business owner, you are no longer restricted from using tools that were only available to large corporations—you have the same capabilities.

After the user logs in to the Office 365 service (see Figure 2-1), Office 365 displays the features available to the user (based on the plan that the administrator has assigned). Each plan is designed with features to best meet the needs of businesses based upon business size or other factors. All business and users are different. Office 365 allows the administrator to mix and match different plans to meet the individual user needs in the organization. The popular plans are Business Essential, Business Premium, and E3. There is no longer a requirement to have everyone on the same plan; you can mix all types of plans in your Office 365 subscription.

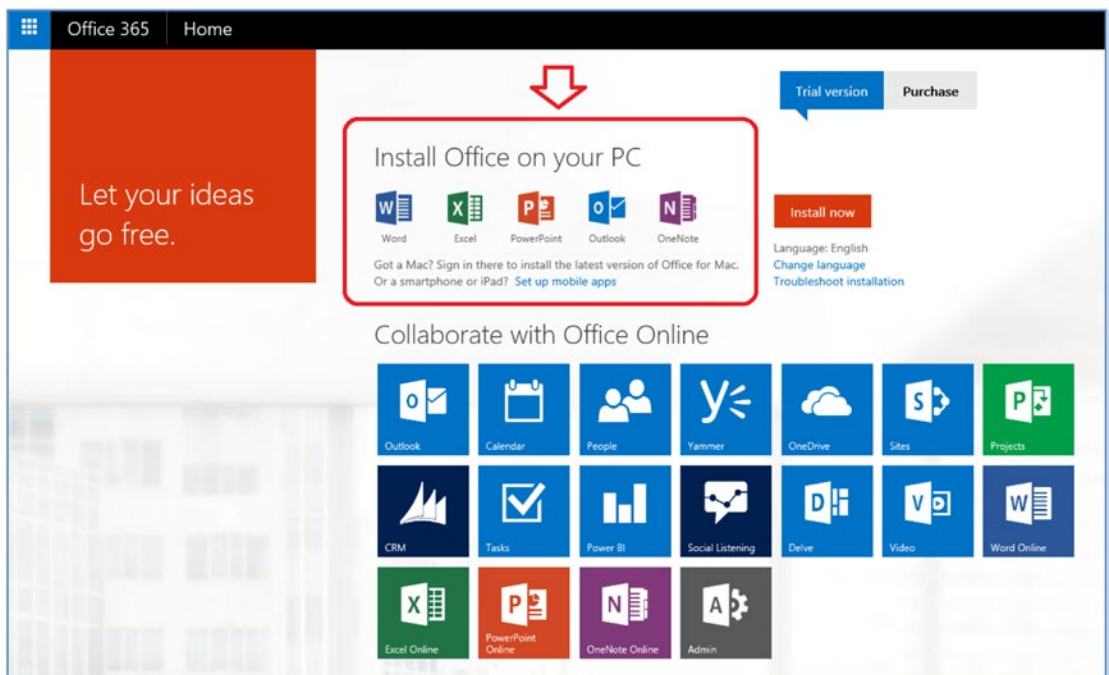


Figure 2-1. Office 365 login page

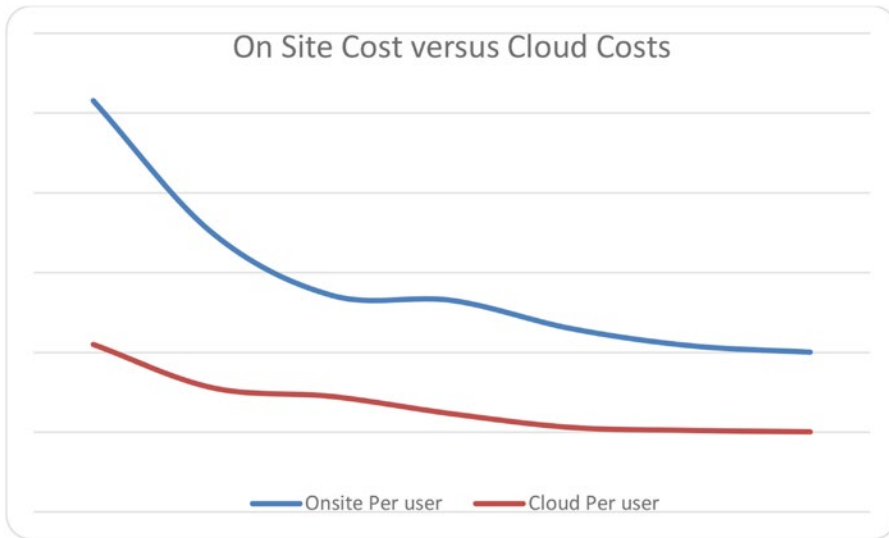
The administrator can select the plan mix that makes business sense for the users in the company. Office 365 supports Macs, PCs, iPads/tablets, and mobile devices. All the user needs to do is log in using the Company Credentials at <http://office.microsoft.com> (or <http://portal.microsoftonline.com>). Our approach to an Office 365 configuration is to select the subscription that best matches the roles of the employees and the needs of the organization.

This chapter details a day in the life of an Office 365 user and the materials needed for setting up one computer to use Office 365. This approach enables most end users to start an Office 365 trial subscription and successfully configure the service. We have placed additional information about the Microsoft Customer Immersion Experience (CIE) center and the Microsoft FastTrack service in the reference section of the chapter.

The “A Day in the Life of an Office 365 User” section explores Office 365 capabilities in the Microsoft demonstration site and details the features of Office 365. Taking the time to test service offerings in this way tends to result in the most successful migrations. With a basic understanding of the service offerings, identifying the ones that match your business needs becomes simple.

## A Day in the Life of an Office 365 User

In the previous chapter, the Ready Design Custom Cupcakes (RDCC) company completed a business analysis of Office 365 cloud services and was ready to move to Office 365. The IT manager (let’s call him Tom) looked at his total company spending, and with the help of his Microsoft Partner, determined that his on-site cost was about \$115 per user, per month; and the Office 365 cost was approximately \$53 per user, per month (see Figure 2-2). These costs included ongoing support.



**Figure 2-2.** On-site costs vs. cloud costs

However, Tom had questions about how Office 365 services would benefit his users at RDCC. He and his Microsoft Partner set up a demonstration. Most Microsoft Partners can set up different types of test environments, but in the RDCC case, the Microsoft Partner, KAMIND IT, chose to use an interactive training session using the CIE, which provides a fully configured Office 365 experience. This exercise exposed Tom to the full range of Office 365 capabilities and features in such a way that he was able to relate his new knowledge to the Office 365 migration project at RDCC.

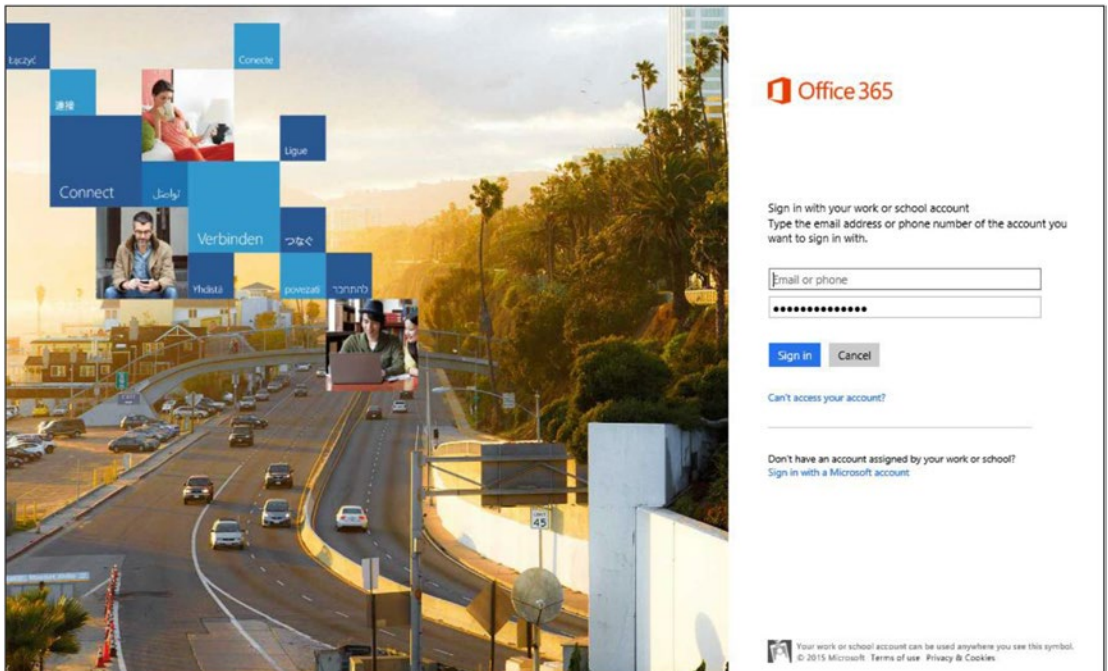
The CIE is a preconfigured Office 365 organization that supports all of the Office 365 services, including Yammer, Project, Exchange, Skype for Business, SharePoint, OneDrive for Business, Delve, Video, CRM, Enterprise Mobility Suite, and Microsoft Intune.

Now Tom is looking for ways to reduce the costs of managing the Office 365 user's devices with a cloud solution so that RDCC does not need to manage an on-premises solution using Microsoft System Center. KAMIND IT suggests that Tom play the role of an end user in the Microsoft demonstration company, Contoso, Inc. Tom is assigned an Office 365 user account, and he assumes the hypothetical identity of a Contoso sales associate, Karen Berg.

■ **Note** The “Where to start with Office 365” section is a *hands-on tutorial*, not a *configuration guide*. We have dedicated a specific chapter and all of the necessary configuration information to set up your desktop. The tutorial serves only to show the features of Office 365; the ones that you really need can be selected and applied to your specific work environment.

## Where to Start with Office 365? A Hands-on Tutorial

Start by opening up a web browser and logging in to the Office 365 site at <http://portal.office.com> or <http://portal.microsoftonline.com> (see Figure 2-3).



**Figure 2-3.** Log in to Office 365: login screen

Once you have entered your e-mail address, Microsoft Online Services determines if there are multiple accounts for different Microsoft services under your e-mail address. Microsoft offers two different services for users: consumer services and company or business services. These services are represented as a Microsoft account and a Work (or Organization) account. The Microsoft account is for Microsoft services that require a unique ID, such as your e-mail address. Examples of these accounts are Hotmail, Microsoft Outlook.com, Xbox Live, Windows Phone 8.1, and volume license services (to name a few; there are other consumer services). A Microsoft account can be any e-mail address (for example, you can have a Gmail account as a Microsoft account) and is used to provide secure access to Microsoft services.

The Work account is your Office 365 company business service account. The services of these two accounts are different and isolated from each other on different servers in one or more Microsoft datacenters. It is very common that a user will have both a Work account and a Microsoft account. When you access Office 365 services, you always use the Work account.

---

■ **Note** You do not need to have a Microsoft account to use Office 365, only a Work account.

---

## Logging in to Office 365

After you have opened a browser to either [office.microsoft.com](http://office.microsoft.com) or [login.microsoft.com](http://login.microsoft.com), select the sign-in and enter your Office 365 work e-mail address. If you have added consumer capabilities to your e-mail address (found at [account.live.com](http://account.live.com)), then you are presented with two choices (see Figure 2-4). If you are going to access Office 365, then select the **Work account**.

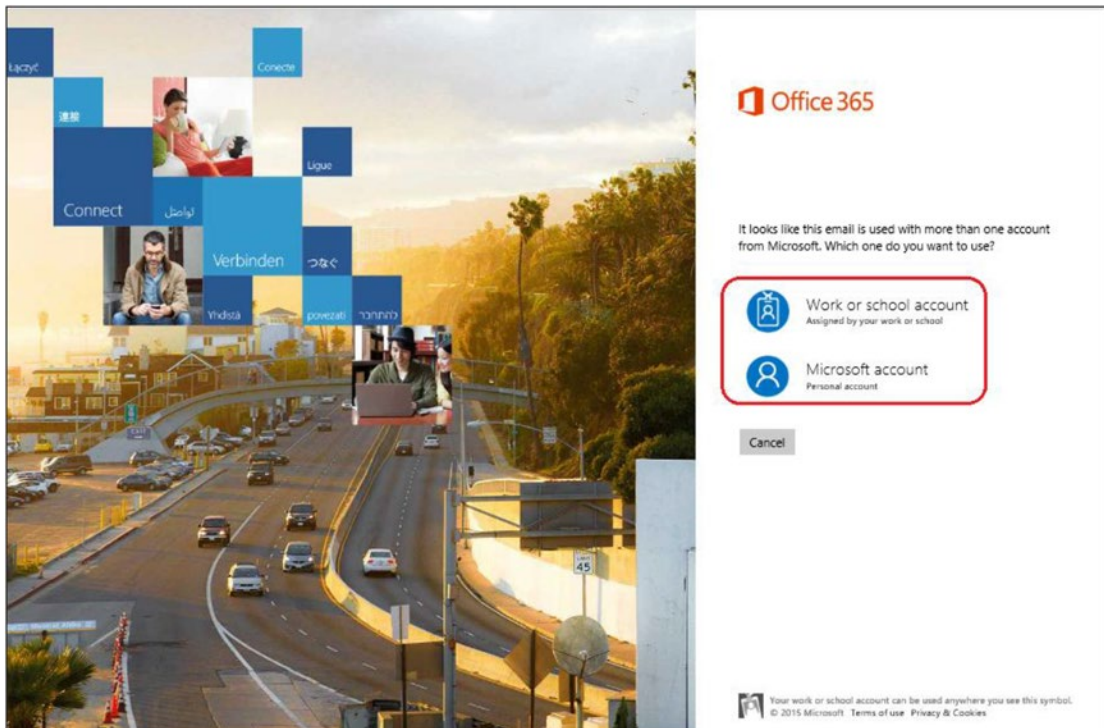


Figure 2-4. Access Office 365 using a Work account

Once you have entered your password, you log in to Office 365 services. The next step is to explore the interface of Office 365.

RDCC's IT manger, Tom, chooses to use the hypothetical persona of Karen Berg, a sales associate in the Contoso Company. Tom wants to experience the operation of Office 365 from a productivity point of view as a user. When you log in to Office 365 for the first time, a normal Office 365 user (like Karen Berg) sees an initial configuration screen that introduces Office 365 services to the user in the self-service portal (see Figure 2-5). Tom likes this approach because the self-service portal reduces the calls to his help desk and improves his users' satisfaction.



**Figure 2-5.** Office 365 first-time login

Tom, acting as Karen Berg, sees that he can continue to install the Office 365 software for his PC/Mac, phone, and tablet without any help desk support. He sees the Install Now button and realizes that he can install Office ProPlus for his PC. Tom is interested in Mac support as well, so he logs in from his Mac and selects installs it too. The correct Office 2016 for Mac software is supplied as part of the download. Tom realizes that this self-service feature will help him deploy Office ProPlus and Office for the Mac to his clients.

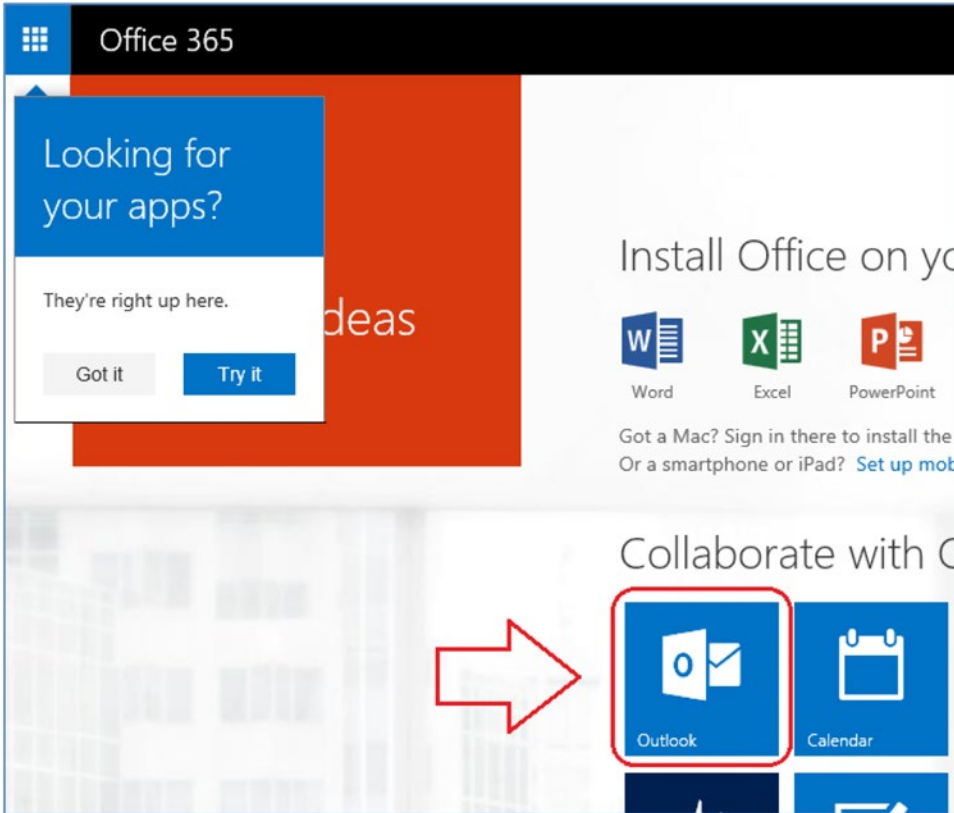
Tom's Office 365 partner, KAMIND IT (partner ID 4471503), recommends that Tom start with Outlook. KAMIND IT configured the demonstration center and his subscription with Microsoft FastTrack SharePoint site for RDCC. FastTrack is a site that includes training material, support video, and deployment plans for moving your business to Office 365. KAMIND IT's business practice is to deploy all customers with the Microsoft FastTrack site to help empower users with migrating to and using Office 365.

---

■ **Note** KAMIND IT uses a 93-point checklist for Office 365 deployments. KAMIND IT believes that all users need to understand the capabilities of Office 365. It deploys FastTrack SharePoint sites to speed the deployment and to provide training resources to IT managers to reduce the cost of support with using Office 365. KAMIND IT has deployed more than 300 Office 365 and Microsoft Intune customers.

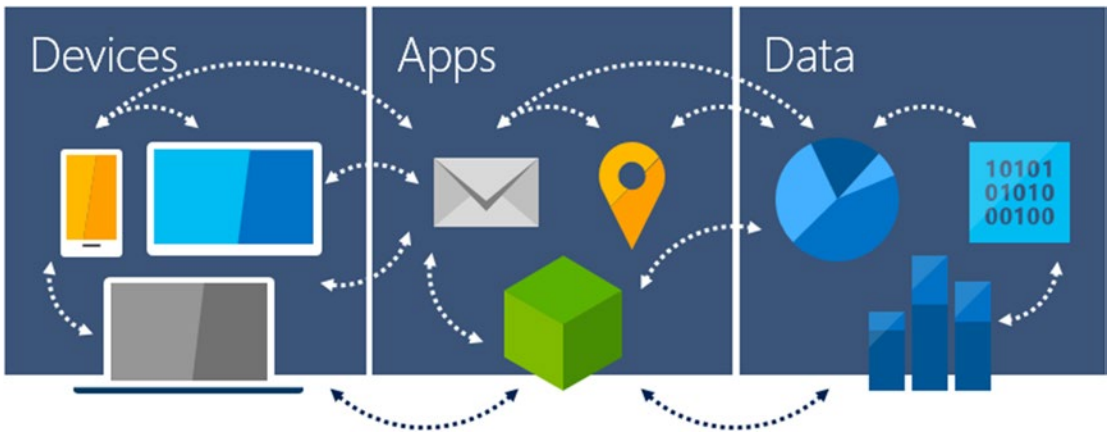
---

Tom selects the Outlook icon (see Figure 2-6) to begin to exploring the online services. Tom notices the nine-block grid in the upper-left corner (with the description “Looking for your apps”) of the browser and discovers that he can navigate to the various Office 365 web applications. Tom’s goal is to launch Outlook. He notices that if the web applications are missing, he can select the nine-block grid to return to the application choice. Tom explores the different services, such as Web Outlook and his personal cloud document storage, OneDrive for Business. Tom selects the Outlook tab (see Figure 2-6) to see Karen’s e-mail.



**Figure 2-6.** Accessing Outlook: Office 365

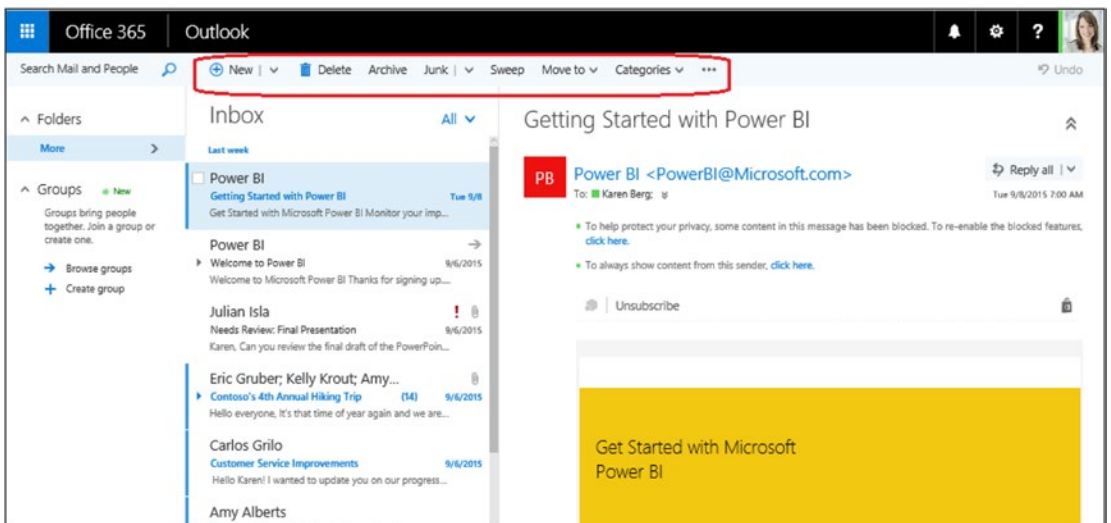
Office 365 Outlook mail services are designed to provide data synchronization between all devices that are using Office 365. The simplest way to look at this is that all information is synchronized, so in using e-mail on his smartphone, web browser, or local Outlook, Tom only needs to “read once” and/or “delete once” and all devices connected to Office 365 e-mail services will sync his actions. The e-mail that Tom sees on his tablet is the same on his smartphone and in the cloud (see Figure 2-7). The information is updated and in sync with the data sources, line-of-business applications, and user devices (smartphones, tablets, laptops, or desktop systems).



**Figure 2-7.** Accessing Outlook from a tablet (courtesy of Microsoft)

## Accessing Outlook Web Application (OWA)

Tom begins to explore the Office 365 web site. The Microsoft Partner, KAMIND IT, informs him that after the initial login, all future logins to Office 365 replace the user start page to either use Outlook or the Team Site, depending on the license that is assigned to the user. As an example, if the user only has a SharePoint license, she will land on the Sites page. If the user has an e-mail license, then he will land on the Outlook page (see Figure 2-8). Karen's license is a full Office 365 subscription that includes access to SharePoint and Office 2016, so her default page is the Outlook Web Application, or OWA.



**Figure 2-8.** Office 365 landing page for user with an e-mail account

Tom notices that the Office 365 OWA looks very similar to the Outlook desktop client. The interface is crisp and simple to understand. When you select an e-mail, you can easily move the e-mail to different folders or set into color-coded categories. The Outlook e-mail, calendar, and People (contacts) are easily navigated. Tom notices that the OWA supports right-click actions on the interface (see Figure 2-9). This is important to Tom so that the sales staff can color-code their customer e-mail into different categories.

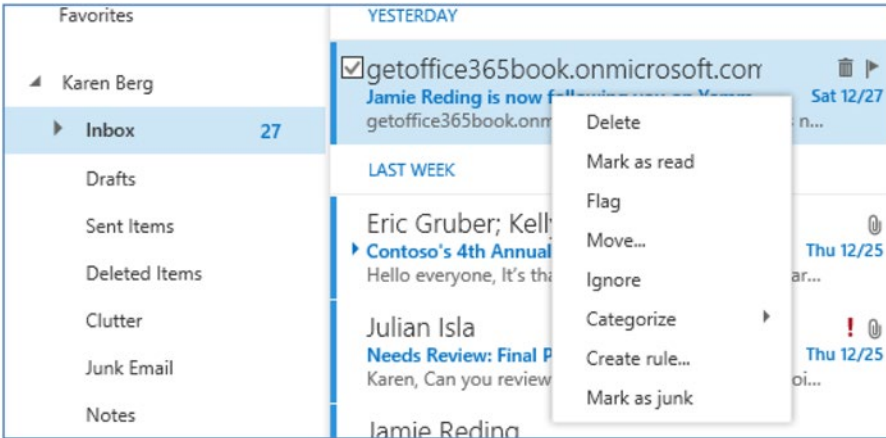


Figure 2-9. OWA with right-click support

Tom also notices that he can assign individual categories to e-mail, and that these categories are updated on both OWA and the desktop Outlook (see Figure 2-10). He quickly realizes that this is a big benefit to his users. He constantly gets midnight calls from the president of the company, complaining about the color tabs with the older desktop software he was running. Tom realizes that he has solved this one problem through migration and provides full compatibility moving forward.

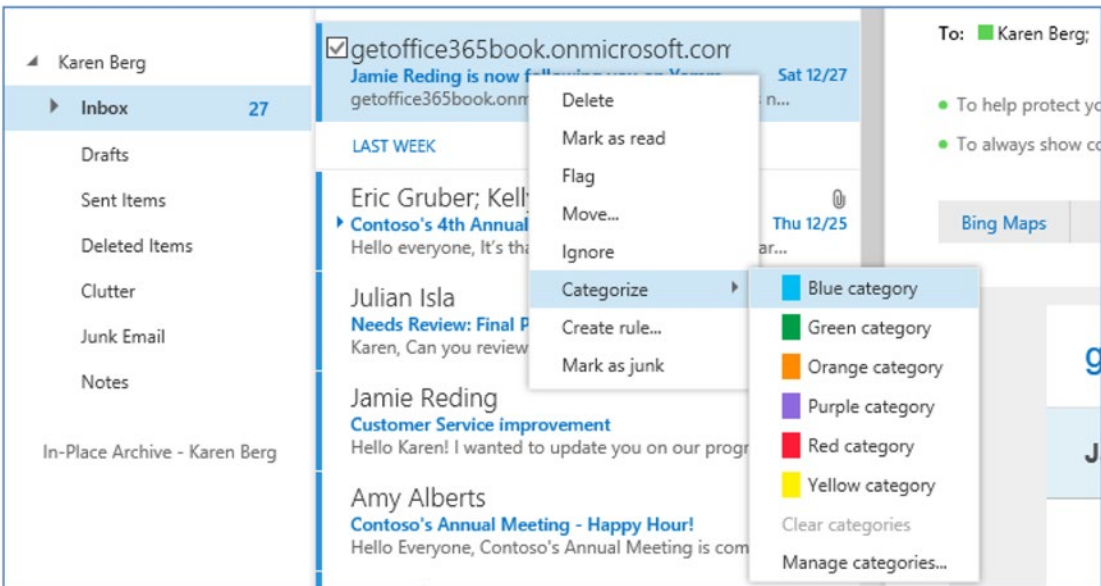
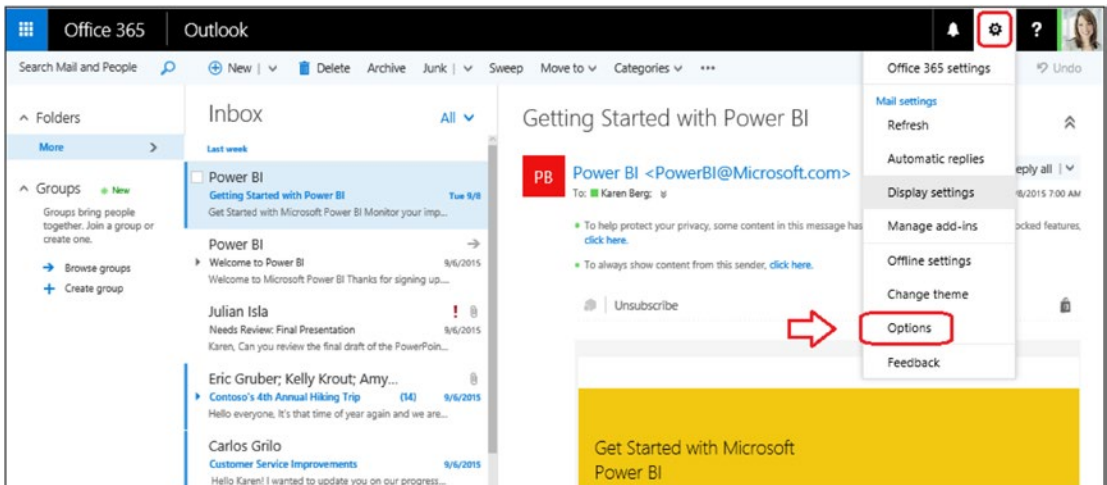


Figure 2-10. Outlook Web Application (OWA) with e-mail category tabs

■ **Note** IT policies can override individual policies on e-mail retention. The default is to allow the user to determine the best way to save e-mail. We have seen corporate e-mail retention policies provide as little as 90 days' history. Many of us expect to retain years of old e-mails.

## Setting Outlook Options

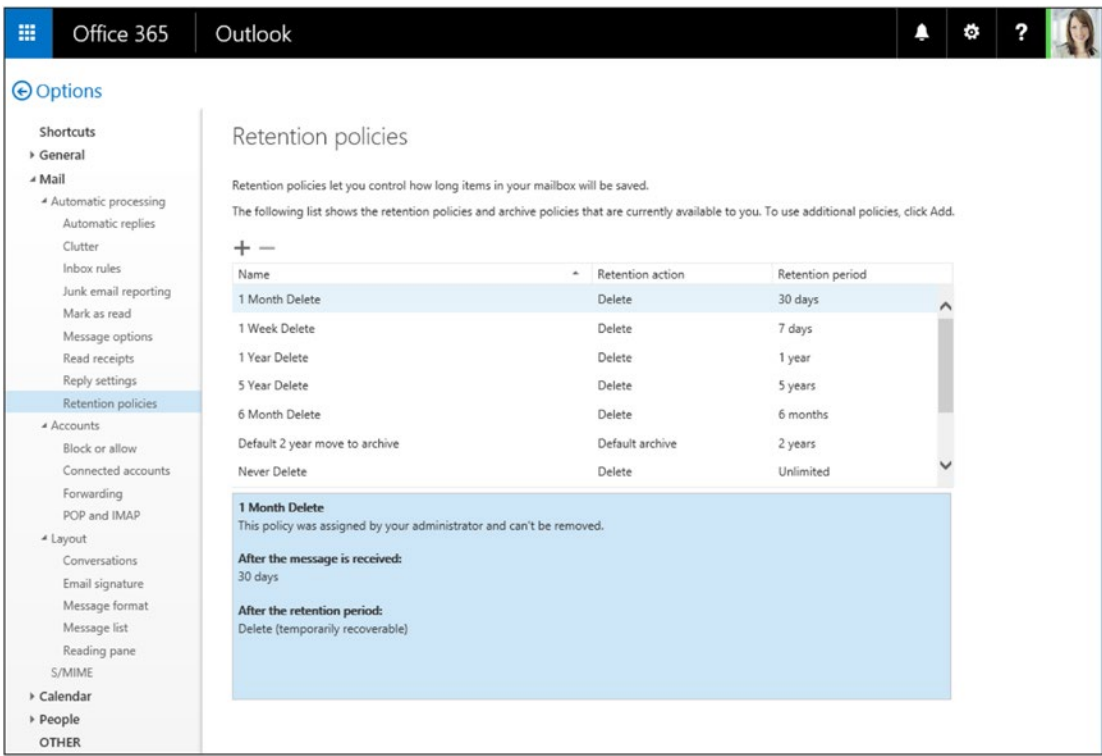
One of the capabilities that Tom is looking for is the ability for his users to make the necessary configuration changes, such as adding a signature, and setting the e-mail retention policy and out-of-office messages. Tom speaks to his Microsoft Partner, who explains that Office 365 OWA has configuration settings. To access these settings, the partner instructs Tom to select the gear icon next to the user picture in the browser (see Figure 2-11) and then select the Options. For example, the e-mail options include automatic processing, account configuration, customization of the e-mail template, checking on delivery reports, and managing personal encryption.



**Figure 2-11.** Office 365: Selecting the e-mail options settings

One of the problems that Tom is dealing with is the personal e-mail retention policy. Tom has set the corporate e-mail retention policy and compliance requirements, but allow the users to have some granular control. As an example, the corporate e-mail policy is set to move e-mail from the main mailbox into the archive folders after two years. Tom has individual users that want to move their e-mail into an archive folder after 90 days.

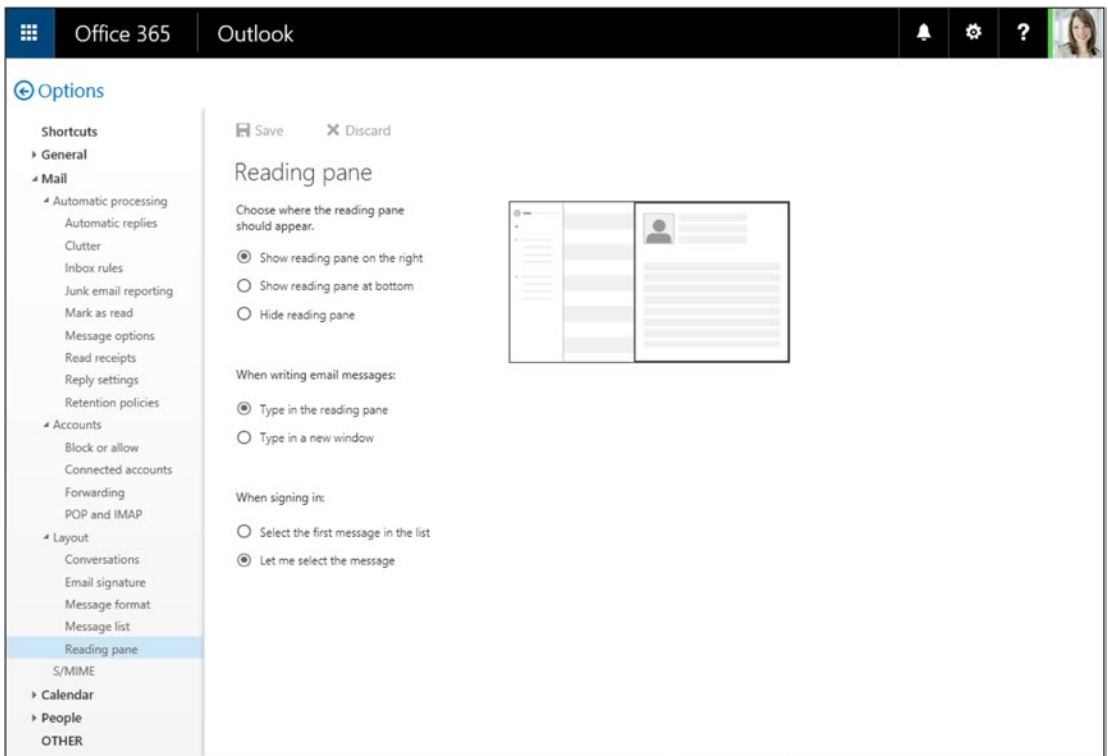
Tom quickly sees that he can provide individual users more freedom to manage their own inbox and to add their own individual retention policy. He selects the Options, and then selects Retention Policies (see Figure 2-12) for e-mail retention. In this case, he sees that “never delete” is enforced on the mailbox. The Microsoft Partner informs Tom the e-mail size is 50 GB per user, and the per-user archive is unlimited. Tom quickly realizes that this is a big benefit to his users. He also often gets midnight calls from the president of the company, complaining about the limited size of user mailboxes. At some point, most of us have suffered the frustration of an over-full mailbox, either as a sender or as a receiver. Office 365 removes this frustration.



**Figure 2-12.** Office 365: setting an e-mail retention policy

Tom also notices there are some additional options that he can set. One of the features that he notices is called Clutter. The Microsoft Partner explains that Clutter is used to manage e-mails that you receive that are not viewed often in your inbox. The analogy that the partner uses is to think of Clutter as stacks of paper on your desk. Clutter moves one of the stacks to a folder to make it easier for you to concentrate on the business. Clutter operates under the mailbox rules and e-mail is not deleted. Clutter just moves those e-mails that are normally not read into the clutter bin. This is much different from the Junk folder, which is for spam and where e-mail is deleted after 30 days (assuming you have the default retention policies in place).

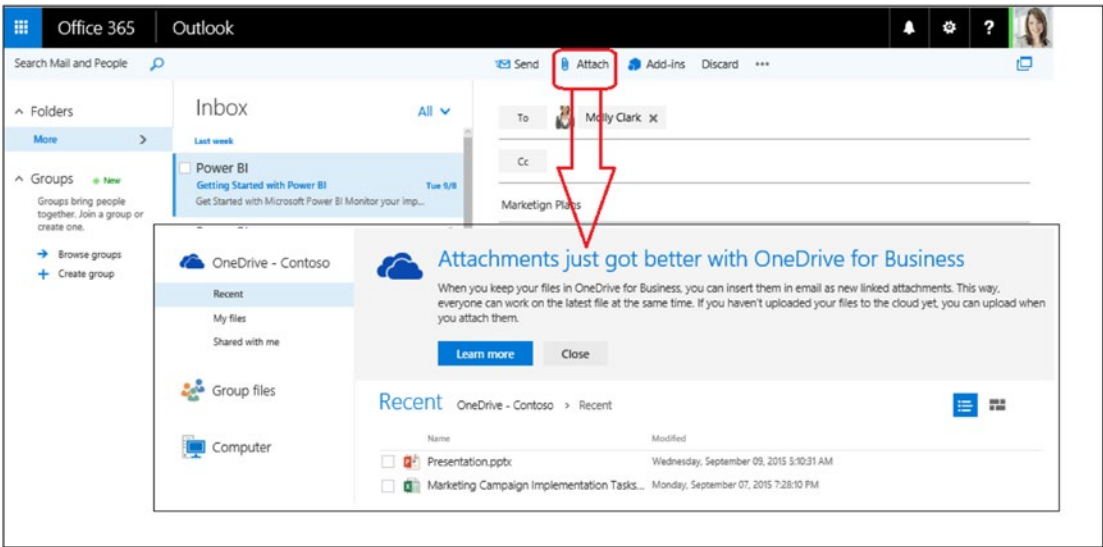
There are additional features that Tom sees that are very valuable for his users. Distribution groups for instance. The users can create their own distribution groups for various team meetings. He also notices that the user can adjust the viewing panes and customize the panes for the device that they are using. Tom thinks about how he likes to read e-mail on his iPad. He can now set the view pane to reflect his device style (see Figure 2-13).



**Figure 2-13.** Office 365: Setting the OWA viewing pane under options

Tom is also interested in the way e-mail attachments are handled in the OWA. The current web mail tool that he is using makes it almost impossible to send e-mail attachments to other users. When Tom is using his iPad, he just gives up and pulls out his laptop, which is simpler than using the iPad. Tom would like to use a web browser and just attach a document in a new e-mail, rather than forwarding an e-mail that has the attachment but the e-mail content is a different subject. Currently, he does not have an option to do this and he was looking to solve this problem. Tom speaks to the Microsoft Partner, who informs him that he can attach documents from OneDrive or from his desktop.

Tom decides to test this capability, so he creates a new e-mail and selects the “insert file” icon. He discovers that he can send a document from the OneDrive for Business cloud storage. He creates an e-mail and selects the Attach icon (see Figure 2-14). He sees that he can add pictures inline and insert files from OneDrive, his local desktop, and group mailboxes.

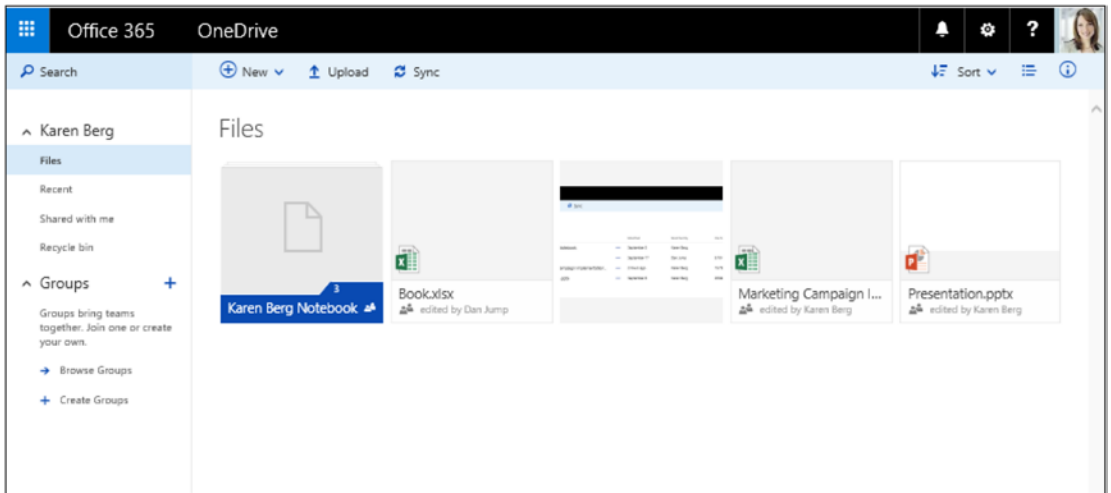


**Figure 2-14.** Office 365: Selecting the attachment options for e-mail

Tom selects the first option to see how to add files; he is surprised to see that the Microsoft Partner was correct. He can add files into a web-based e-mail from the desktop or from OneDrive for Business cloud storage. He sees that this feature can really save him time!

## OneDrive for Business: Overview

Tom reviews the Office 365 features and notices that there is support for OneDrive, Sites, and Yammer. The Microsoft Partner explains that Office 365 document synchronization is part of OneDrive. OneDrive is a Microsoft tool that synchronizes documents with Office 365 and all of the user's desktop or mobile devices. This allows the user Karen to access work documents on her phone, laptop, or desktop computer. The Microsoft Partner instructs Tom to access OneDrive from the App menu (the nine-block grid in left-hand corner) and select the OneDrive menu item (see Figure 2-15) to edit documents in the Office 365 cloud.



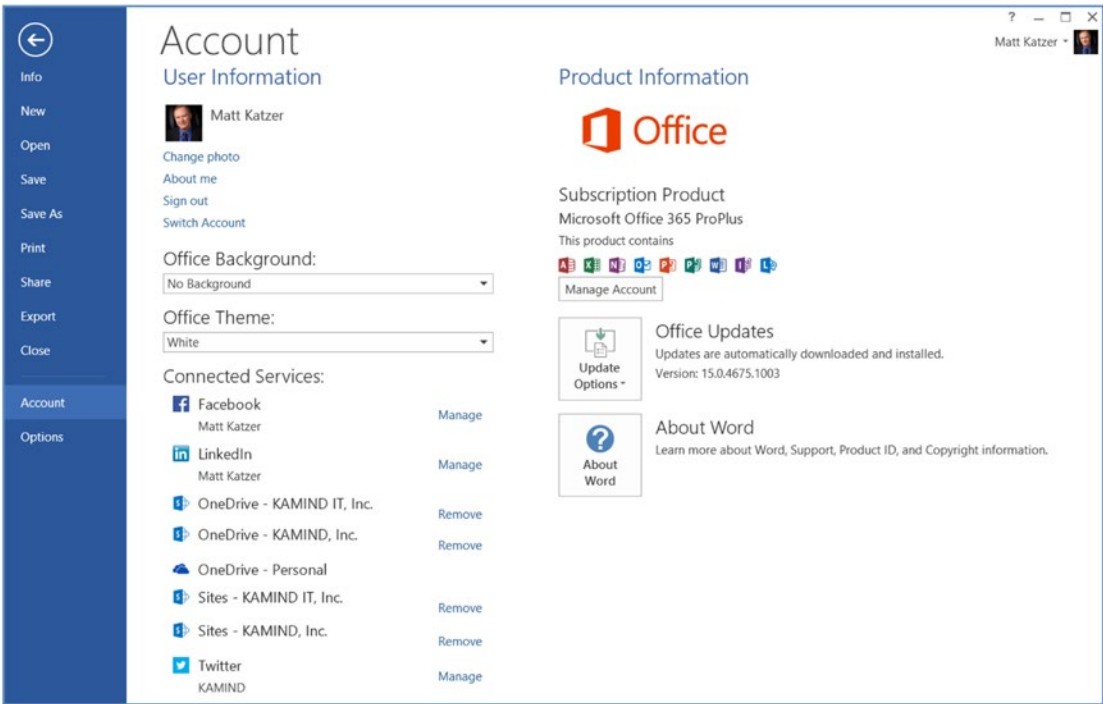
**Figure 2-15.** Karen's personal document storage in OneDrive (tablet view)

---

■ **Note** If this is the first time you are accessing OneDrive, setting up can take a few minutes.

---

Once the setup is completed, Karen's private OneDrive for Business cloud storage is built. Karen's initial OneDrive for Business storage capacity is set at 1 TB (1,000 GB). Tom thinks of RDCC sales associates who have a mobile laptop, iPad, and smartphone, and considers that they are located in several different parts of the world. He realizes that OneDrive for Business storage solves a problem for RDCC by easily maintaining control of company documents in centralized team storage, without the associated overhead costs. Tom starts Word 2016 and looks at the account settings (located under File menu) to see the different services that he can use (see Figure 2-16).



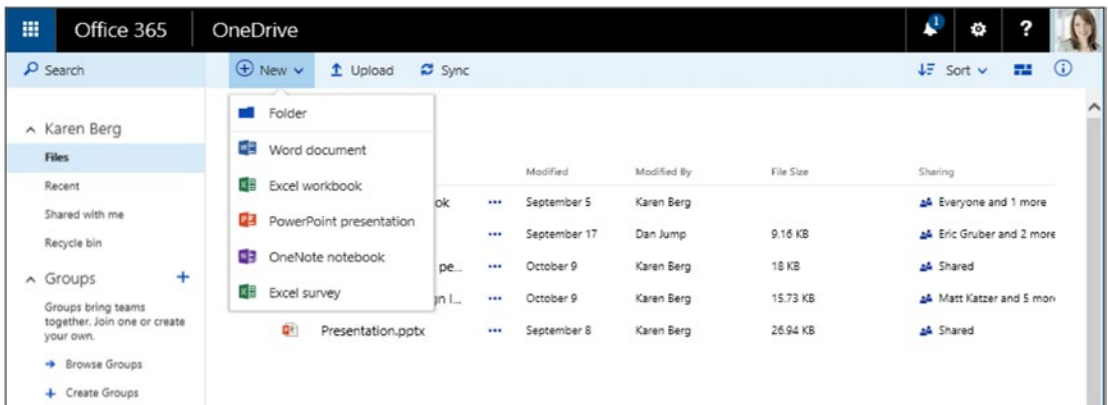
**Figure 2-16.** Using Word 2013, selecting files from OneDrive, OneDrive for Business, or Office 365 SharePoint

Tom’s Microsoft Partner informs him that OneDrive for Business is included in the subscription he plans to use for RDCC, at no additional cost. He realizes that OneDrive for Business combined with web-based Outlook (OWA) solves a lot of problems for his users.

Tom explores other aspects of using documents in the cloud and discovers that any document that is uploaded to the cloud can be used in any collaboration. Office 365 has two document storage areas. One is the personal OneDrive site and the other is the company’s Team Site. The difference between the two is that the personal OneDrive site is managed by the user (Karen) and the Team Site is managed by the IT department.

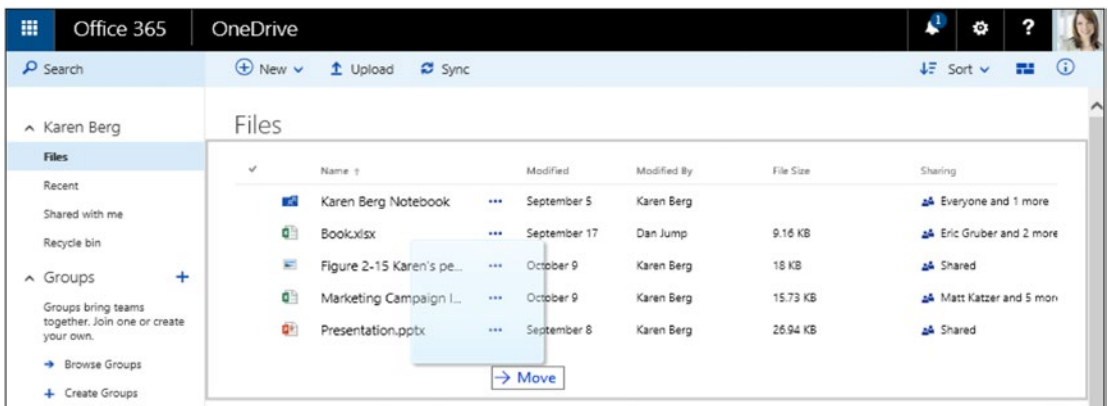
## Document Collaboration

The Office 365 OneDrive and Team Site allow Tom to create documents specifically for collaboration. He can just select the **New** dropdown menu shown in Figure 2-17, then select the type of document he needs.



**Figure 2-17.** Office 365 document creation

Tom can also upload documents from other systems to Office 365 using a drag-and-drop interface. He discovers that when he uses Windows 8.1 and Windows 10, he can easily drag documents (see Figure 2-18) to the OneDrive for Business site in the web browser and place those documents in his personal area on Office 365. Tom also experiments with the Team Site and discovers that he has the same capability there.



**Figure 2-18.** Uploading documents to Office 365

Once a document is saved in Tom's personal area of Office 365, it could be shared with other members of the team as needed. Once documents are uploaded, they also can be edited with Office 365 web applications (Word, Excel, OneNote, PowerPoint) or with the desktop (or mobile) Office Professional Plus software, which supports PC, Mac, and Android devices).

Tom discovers that Office 365 documents can be shared between designated team members using the personal shared folder, or externally to users outside the company. Tom experiments with sharing documents by selecting the ellipses (...) for additional options, and later the Share option in the menu bar. Tom is surprised to see a preview of the file with an option to allow him to explicitly share the document (see Figure 2-19).

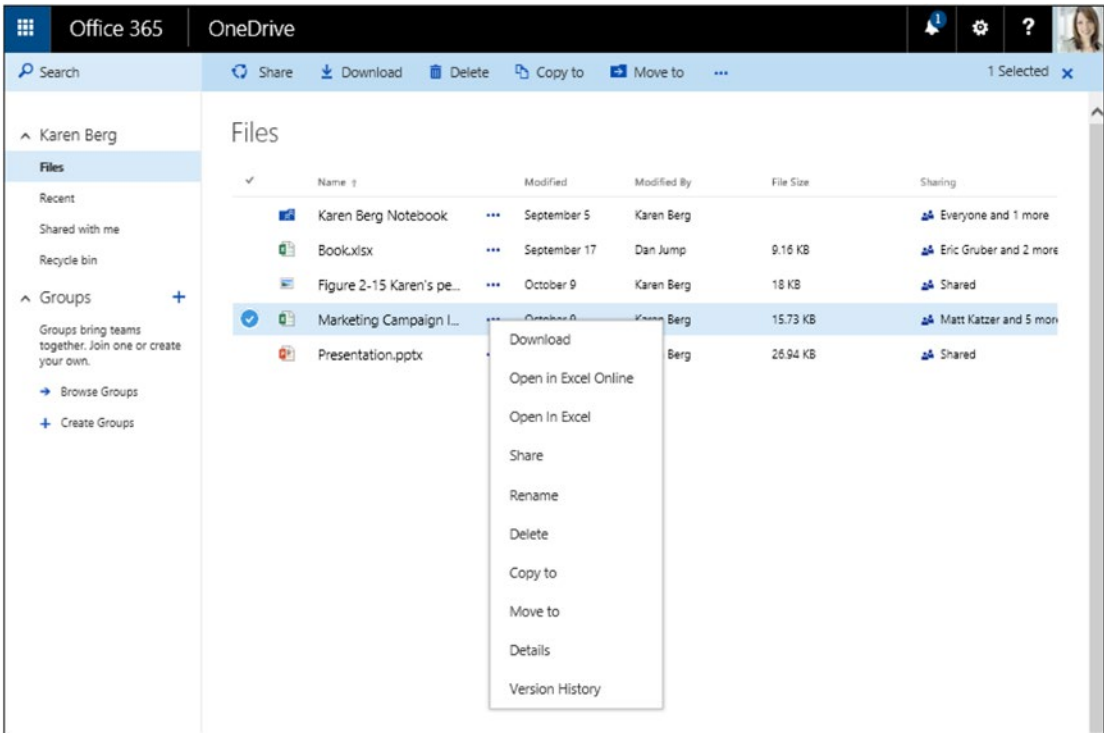


Figure 2-19. Sharing documents in Office 365

Once the sharing options are visible, Tom selects Share and enters the necessary information (such as the user’s e-mail address) to share the directory or the file for collaboration. The files/folders that are shared show the people icon (see Figure 2-20). The files/folders that are not shared show the lock icon.

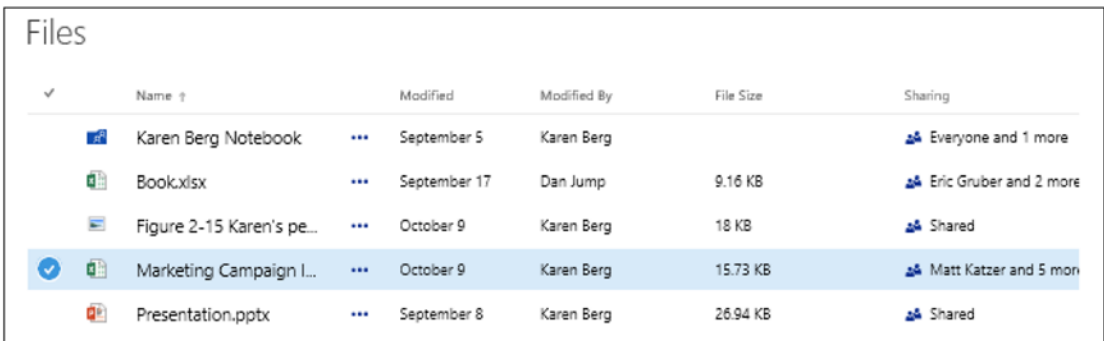


Figure 2-20. Office 365 sharing icons

## Office 365 Delve Configuration

Tom looks at the Office 365 applications that are available (on the nine-block grid), and comes across two new collaboration applications: Delve and Video. He has been looking into these collaboration applications. He comes across information from Microsoft (see Figure 2-21) that describes Delve as a visual tool that links content based on relevancy. Tom has always been fascinated by Facebook and LinkedIn, and the way that these tools display information to the user based on relevancy. The CIO of RDCC has asked Tom if it made sense to create a private Facebook site for the RDCC organization, rather than trying to build something from scratch that would relate information.



**Figure 2-21.** Delve: linking Office 365 content from multiple sources in one spot (courtesy of Microsoft)

Tom further explores Delve and Yammer and discovers that the Office documents are linked by relevancy and user permissions. In other words, Office 365 users start searching for documents in SharePoint, Yammer, or e-mail, and Delve finds the documents that the user is searching. Delve links data that is linked (Office documents). E-mail, Yammer, and SharePoint can easily be related to the user.

Tom looks at different users in the test account and notices that the data is different in Delve, when using “Karen B” account login, than when using the “Molly C” account login in the test account (see Figure 2-22). Delve is about user trending of what is relevant to that user based on the e-mail, OneDrive for Business, Yammer, and the SharePoint site. Tom thinks about the conversation that he had with his CIO, who was concerned that a user’s individual data would be made generally available. Tom is pleased to find that data is isolated and only shown if other users have permissions to see it. Delve could help him deploy the Office 365 OneDrive for Business.

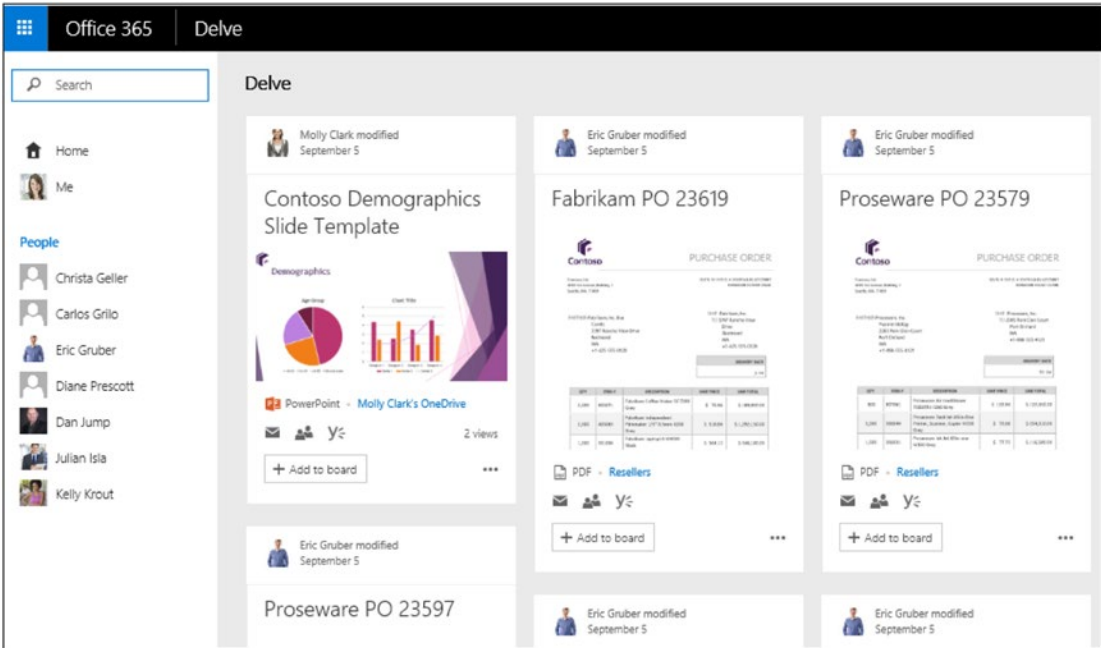


Figure 2-22. Delve: displaying trending information based on personal need to know

## Office 365 Yammer Configuration

Tom has been impressed with the capabilities that he has encountered so far. He sees that Office 365 offers the opportunity to reduce both operating costs and license costs while rolling out new capabilities to his users. However, he still has questions. One of his unresolved concerns is compliance issues. For example, his legal department has asked him to restrict social media access for users in the company. The legal department feels that too much proprietary information (company confidential information) is being discussed on external social media sites such as Facebook and Google Plus.

The legal department advises that loss of company information could hurt business growth and give RDCC competitors advance information on the direction of RDCC products. The Microsoft Partner suggested that Tom consider the Yammer social media service, which is part of Office 365, as a solution. Yammer is a service similar to Facebook that is used to handle group interactions in a free-form manner. It is explained that company information exchanged on Yammer is owned by the company and not licensed to a third party. Usually, a free service has intellectual property rights assignment that overrides the confidentiality of the company information.

Tom selects the Yammer login on the Office 365 page (see Figure 2-23) and logs in to it using Karen Berg's Office 365 account. The first thing that he notices (see Figure 2-24) is the interaction of the different teams and the discussion groups. There were discussion groups for events, HR, and using Yammer itself. Tom could see that Yammer addresses one of RDCC business objectives: to make the company more integrated in their internal communications to improve productivity. The productivity gain addressed this directive and Yammer received full endorsement by the legal department.

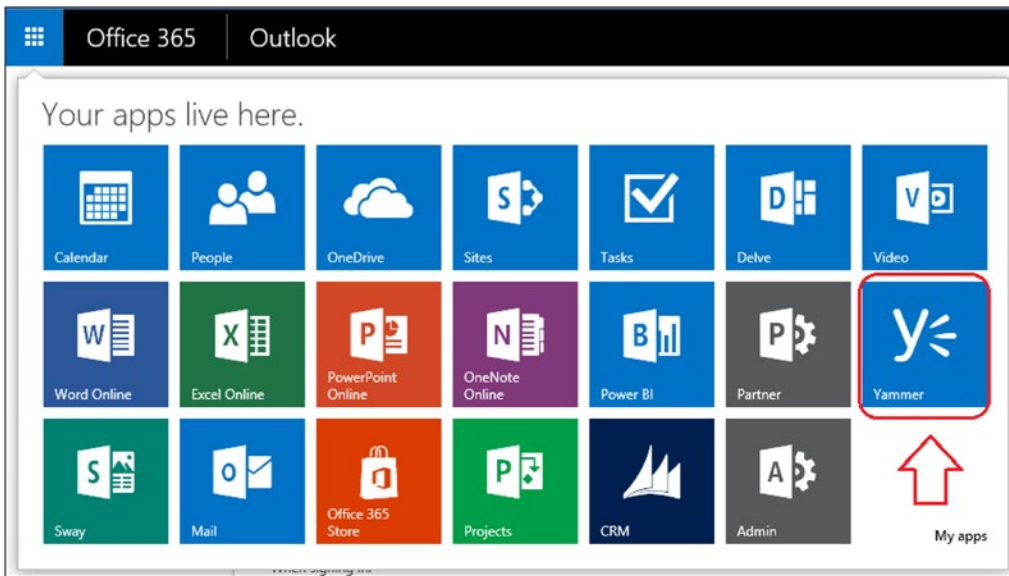


Figure 2-23. Yammer access: Office 365 menu option

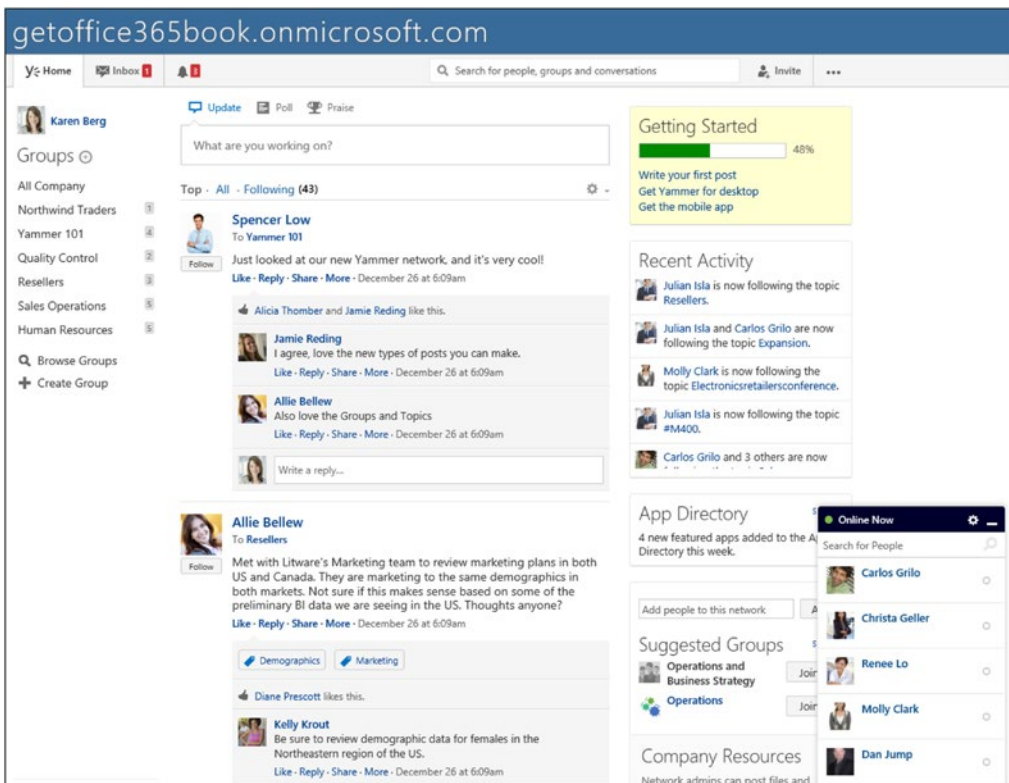
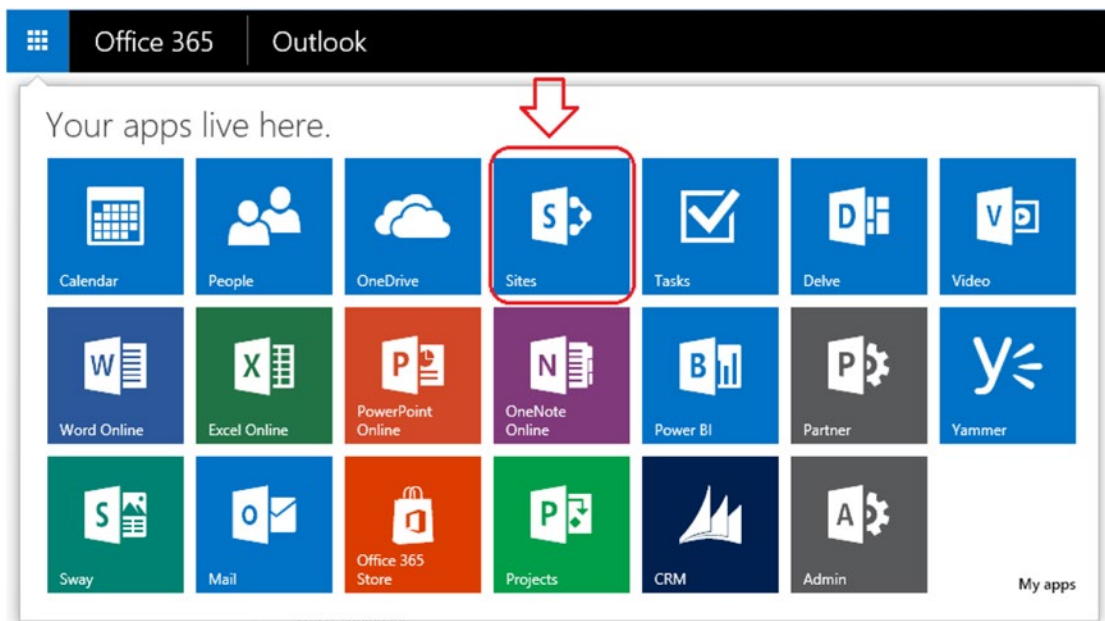


Figure 2-24. Yammer integration for Office 365

Tom quickly realizes that one of the benefits of Yammer is that the service provides a tool for the group’s communications that can be kept internal to the company. The problem with traditional social media solutions is that RDCC’s proprietary information can be accidentally leaked to the public. Legal informed Tom that last year, some employees used free social media sites to share information about a project. The legal department discovered the project discussed in the trade press. Tom was informed about the data leak of company information at a company senior management meeting. He feels that Yammer will allow RDCC to control potential data leaks.

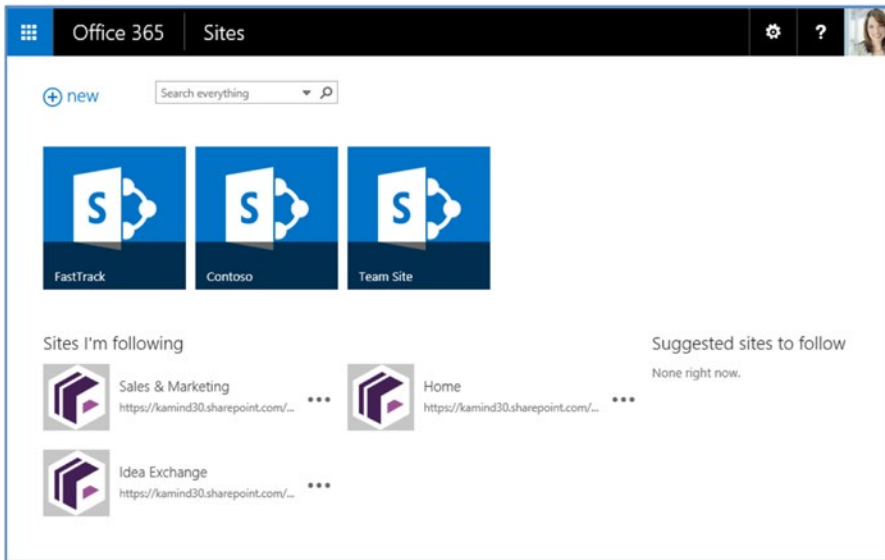
## Accessing the SharePoint Team Site

The final service that Tom reviews is the Team Site. Tom has a business requirement to create a new company intranet and to help the company reduce its carbon footprint. He has a secondary objective to reduce the use of other file-sharing services, enabling the exchange of information with external parties. To access the Team Site, Tom returns to the main Office 365 page and selects Sites (see Figure 2-25).



**Figure 2-25.** Selecting the Team Site from the Sites menu

After selecting Sites, Tom is presented with three choices: accessing the FastTrack (deployment), Contoso (demo intranet), or Team Site (out-of-the-box configured SharePoint Team Site) (see Figure 2-26). Office 365 supports multiple sites, depending on the configuration of Office 365 services. The Office 365 configurations that use the free web site hosting are located in Microsoft Azure Cloud. All Office 365 administrators can link their Office 365 subscription to Azure to host a no-cost WordPress, Drupal, or IIS web site in a shared environment. Office 365/Azure also allows you to have a dedicated web server and scale the web server to any size. Dedicated web servers are billed based on the consumption of server resources.



**Figure 2-26.** Sites that are promoted for users

---

■ **Note** FastTrack is optional and it is not configured into all Office 365 accounts. To add FastTrack, you need to use an E3 or E5 trial, go to [deploy.office.com](https://deploy.office.com), and select the “Getting started with FastTrack” option.

---

## Office 365 Team Site: “FastTrack”

Tom selects the FastTrack site icon to see the capabilities of the FastTrack site. His FastTrack SharePoint site has information on how to manage the migration to Office 365. The Microsoft Partner helping Tom manage Office 365 arranges for Microsoft to deploy the FastTrack content so that Tom can understand the Office 365 migration process and provide the necessary educational material to his end users to speed the transition to Office 365.

Tom discovers that Office 365 SharePoint sites are easy to use and share. He explores FastTrack and selects the Video Learning section. The Video Learning section has additional material on the how to use various features of Office 365. As an example, his users are looking at ways to use SharePoint and OneDrive for Business and learn how to use these Office 365 services (see Figure 2-28). Tom wants to make the site available to all users and finds that the best way to do this is to share the site (see Figure 2-29).

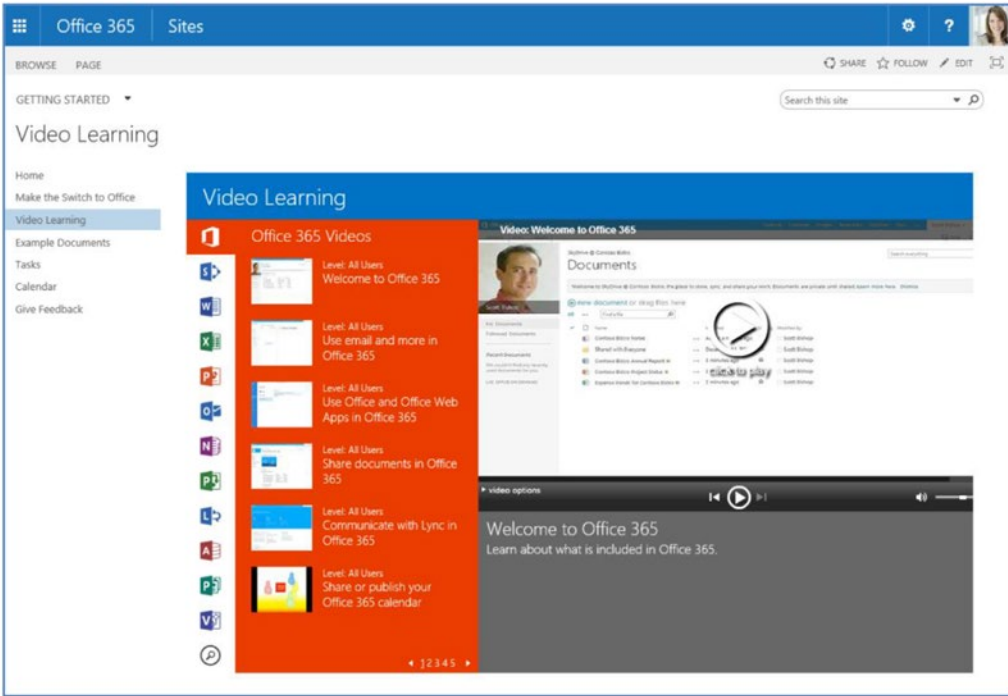


Figure 2-27. Office 365 FastTrack deployment SharePoint video learning site

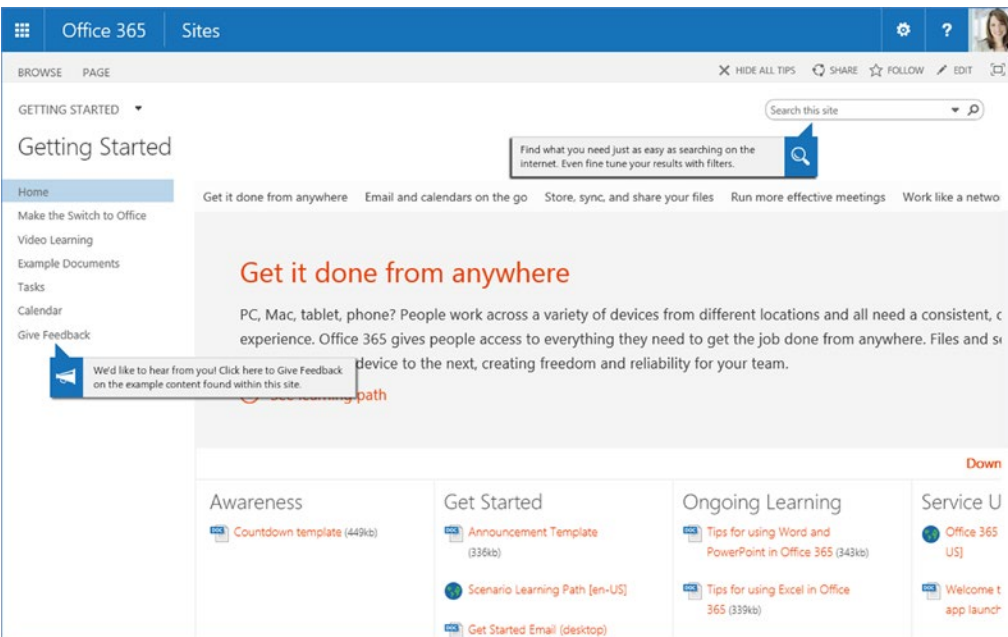
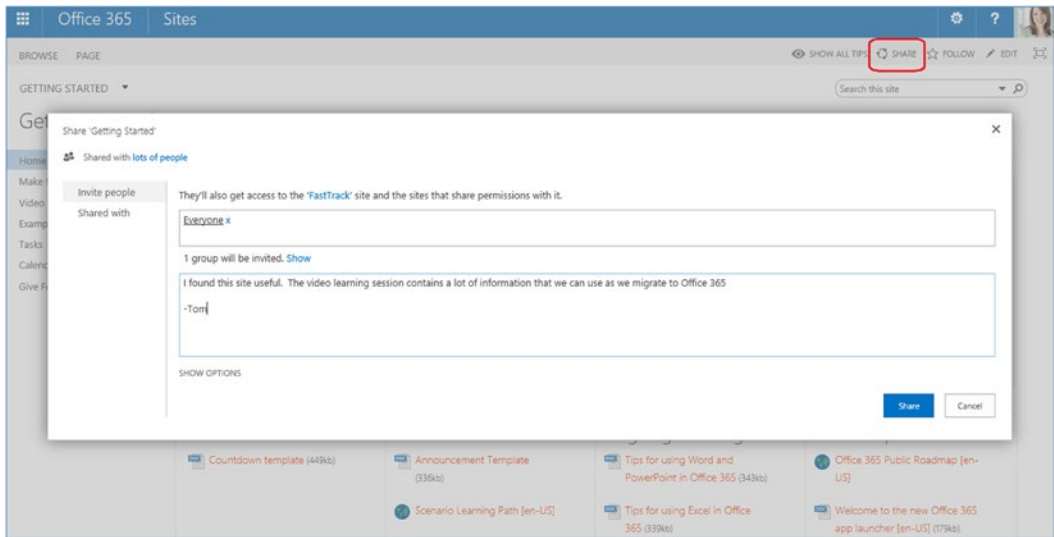


Figure 2-28. Office 365 FastTrack deployment SharePoint site



**Figure 2-29.** Inviting other users to a SharePoint Team site by sharing the site

The Microsoft Partner explains to Tom that the Office 365 account he is using is the Microsoft Immersion Experience Center (MEC) demo Contoso site, a fully functional SharePoint site complete with document retention policies, workflows, and other productivity features. The Partner also explains that these capabilities can be used to improve the operation of RDCC business. Tom selects the Team Site icon and launches the intranet site (see Figure 2-30).

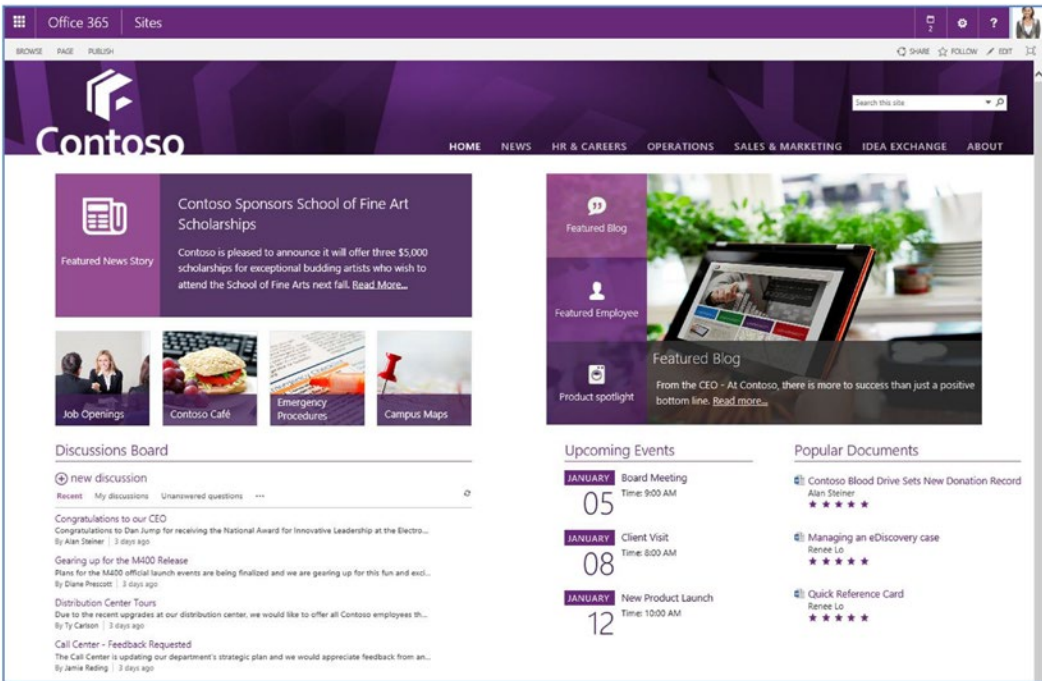
---

■ **Note** Office 365 default configurations do not include the Contoso demonstration site or the FastTrack site. KAMIND IT deploys the FastTrack site to all the Office 365 subscriptions that they manage. Please contact your Microsoft Partner or KAMIND IT if you would like to access this preconfigured demonstration site.

---

## Office 365 Team Site: “Contoso”

The Microsoft Partner explains to Tom that the MEC demo Contoso site is a fully functional SharePoint site complete with document retention policies, work flows, and other productivity features. The Partner also explains that these capabilities can be used to improve the operation of RDCC business. Tom selects the Team Site icon and launches the intranet site.

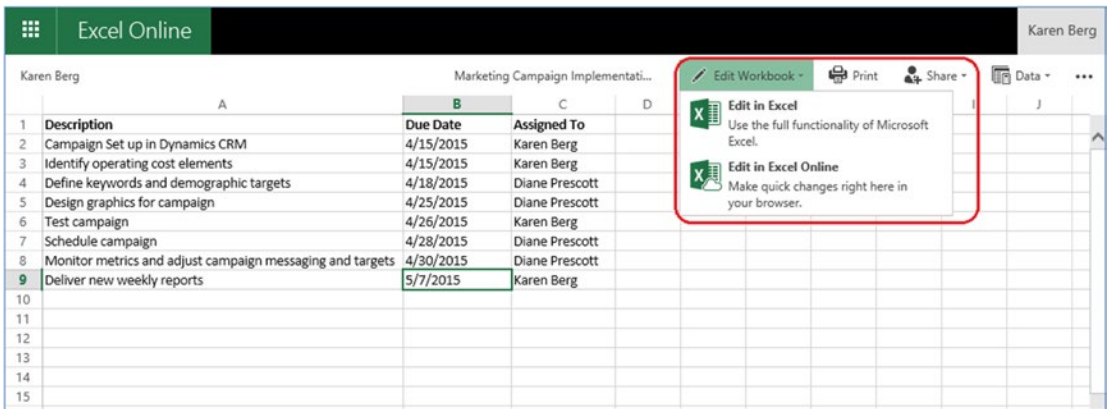


**Figure 2-30.** Office 365 Team Site

Tom looks at the team site and the capabilities that Office 365 has, and then compares this to the amount of servers they use in RDCC to achieve the same capabilities. He realizes that he can add the functionality to his Office 365 SharePoint Team Site and reduce his capital and operating costs at RDCC. In addition to reducing costs (by removing server hardware), Tom realizes that he can assign user permissions, so that individuals can have access to the different business areas. For example, Karen can access the sales resources but can have access to HR, IT, operations, and the account team only as each relates to her business role.

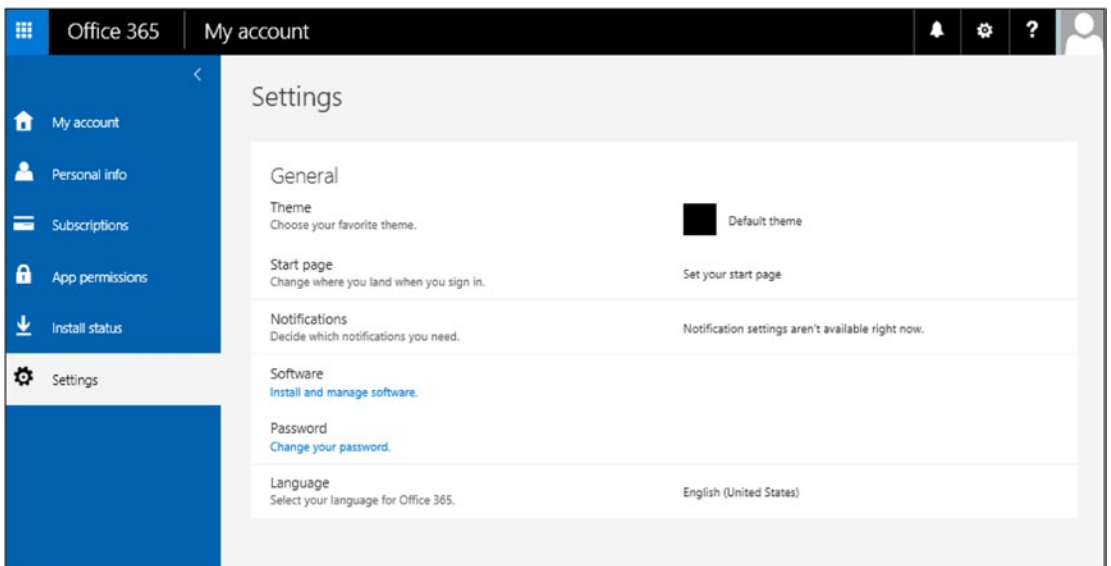
## Office 365 Desktop Tools

The only issue that Tom has not reviewed is desktop tools for Office 365. He returns to the Office 365 portal and installs the client software. He was under the misconception that Office 365 tools only run in the cloud and that there is no desktop software. He learns that Office 365 is a suite of products—namely, desktop and cloud services—that are integrated to work together. Tom looks at editing an Excel spreadsheet in the cloud and discovers that he had the option to edit it in the cloud or on the desktop (see Figure 2-31).



**Figure 2-31.** Editing documents with Desktop Office 2016 Professional Plus

While using the “Karen Berg” login account, Tom is able to use the cloud tools on Office 365 and the desktop office software without being hooked to the Internet. He can work offline on his PC or on his home Mac (see Figure 2-32). The Microsoft Partner explains that Office 365 allows each user to have up to five copies of Office desktop software installed under the subscription. Tom thinks about the cost savings from using subscription services to manage his software assets. He realizes that he would no longer need to manage serial numbers or manage employees installing software on their own computers. Office 365 allows Tom to remove the user software subscription when an employee leaves the company and no longer has any responsibility to remove the software. This is a business liability and huge labor effort that Tom realizes he no longer needs to manage. Office 365 will significantly reduce his operating costs.



**Figure 2-32.** Selecting Office 365 Settings to install Office Professional Plus desktop software

Tom remembers a discussion with one of his users on the differences between Office 2007 and 2010. His comment was that Office is Office; only the menus are different. The 2016 Office 365 is very similar to Office 2010. The major change is that Office 2016 is “aware” of the cloud, so documents can be saved on the desktop and synced to Office 365 (using the OneDrive for Business background synchronization tool), directly to the cloud, or in the user’s local documents directory.

Tom begins the installation process of the Office Professional Plus software (see Figure 2-33). He returns to the Office 365 portal, selects PC/Mac, and then selects Office software to begin the installation process. He notices that he can also add Microsoft Project to his plan by purchasing a license. Microsoft Project and Microsoft CRM are optional software packages that Tom has licensed in Office 365. Tom clicks the Install button to install the Office Professional Plus software on his desktop. The Office 365 startup screen shows the different packages available to the users after they log in to Office 365.

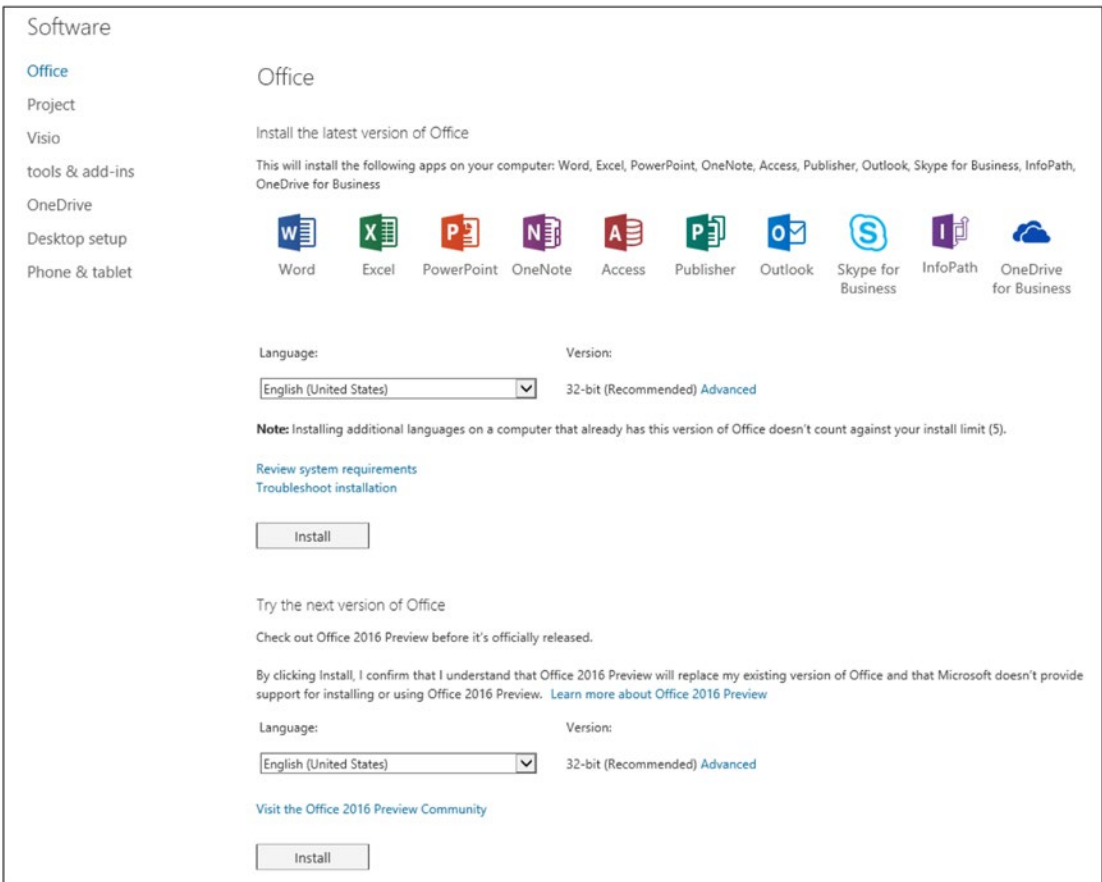
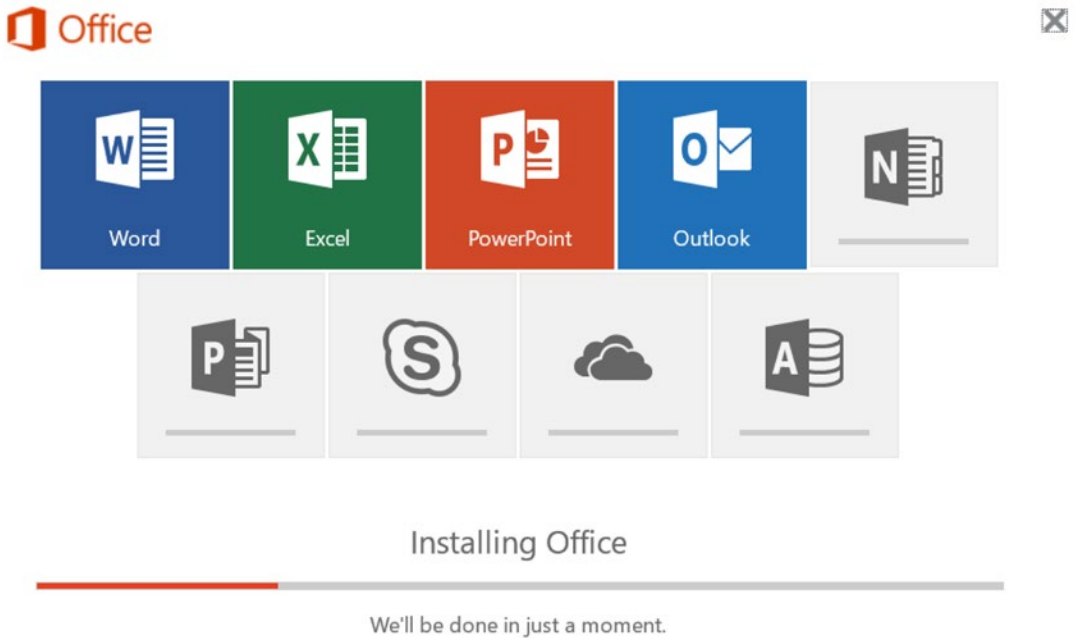


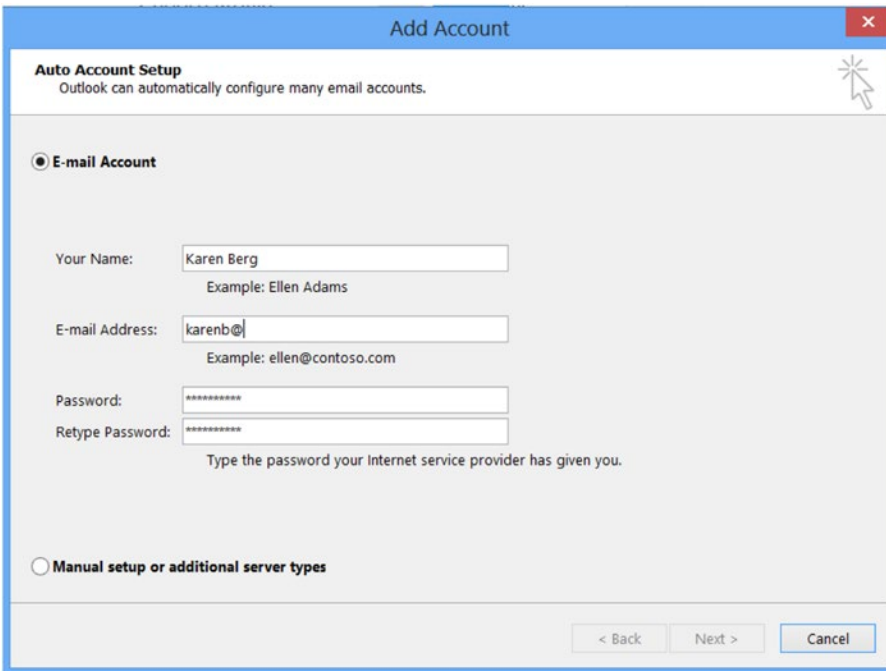
Figure 2-33. Office desktop software installation

The Office installation software is streamed (see Figure 2-34). Streaming means that the user can continue to work while the new software is being delivered from the Microsoft Office servers.



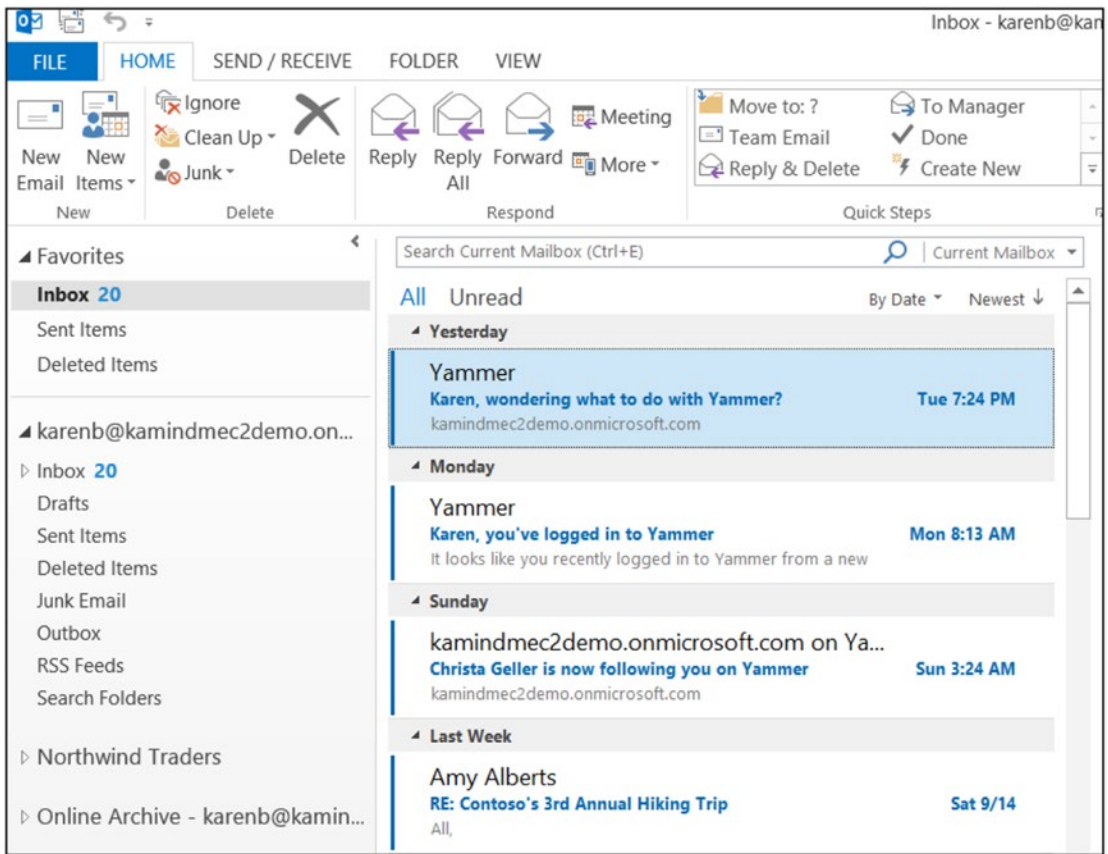
**Figure 2-34.** Streaming Office 365

After the Office Professional Plus installation completed, Tom starts Outlook using Karen Berg's e-mail address for the demonstration account. He selects a New Profile. The installation process requires Tom to enter Karen's e-mail address, name, and password (see Figure 2-35). Outlook discovers the cloud service and downloads Karen's e-mail.



**Figure 2-35.** Outlook startup screen: creating new profile

Tom is off and running with Outlook. He selects Finish (when prompted) and starts Outlook. Karen’s e-mail downloads to Tom’s client. In desktop Outlook (see Figure 2-36), Tom notices that when he reads an e-mail, the Office 365 Outlook Web App had the same changes. Then, Tom notices that his actions to e-mail (read, delete, move) were synced to the cloud. His users have always complained that smartphones do not update the e-mail status after a message was read or deleted. Tom no longer has to worry about this issue; all e-mail is synced to the latest activity. He wants to try one other test, so he disconnects his network connection, creates a new e-mail in Outlook, and sends it. Tom then connects his laptop back into the network and discovers that the offline e-mail sent to Outlook was updated in the cloud.

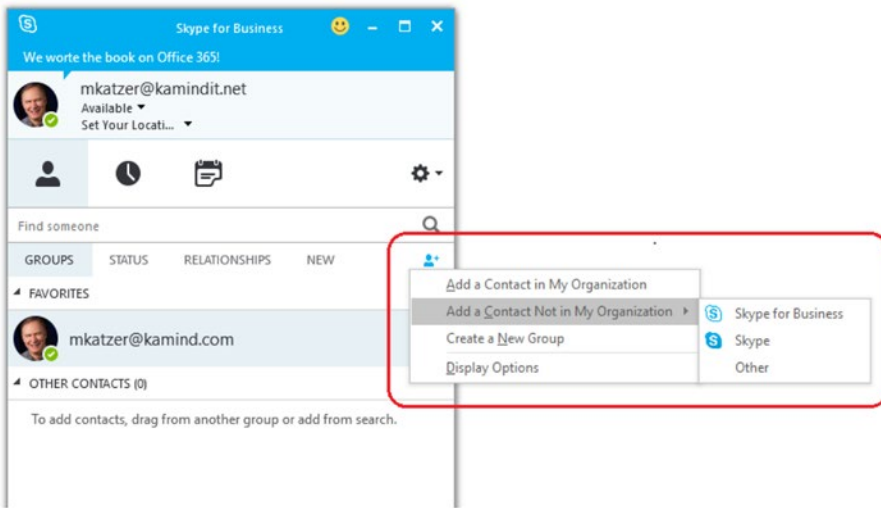


**Figure 2-36.** Karen's desktop Outlook

This solved a big problem for his users. Tom now had full business e-mail, calendar, and contacts synchronization, not only to his desktop version of Outlook, but also to his smartphone and iPad. He realizes that the variety of third-party programs that his users are using to synchronize their contacts and calendars are no longer needed.

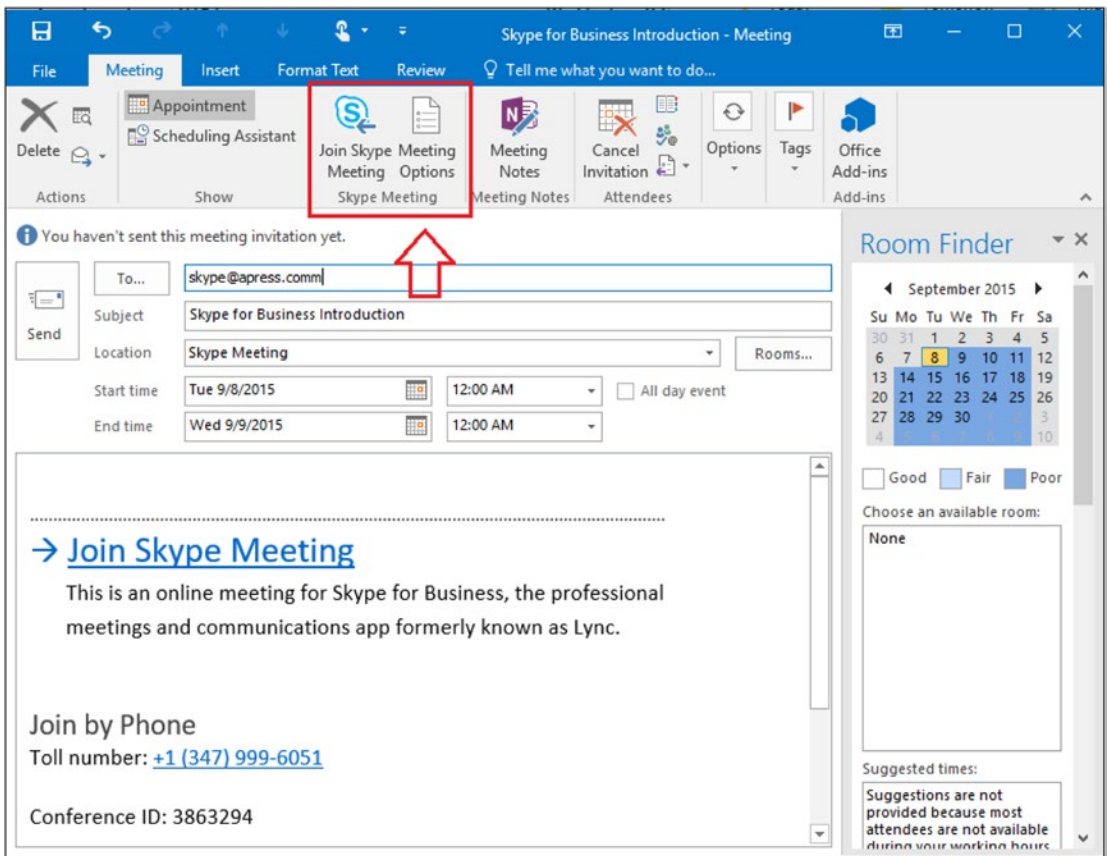
## Using Skype for Business

Tom also has a problem with web conferencing. When he installed Office on the desktop, Skype for Business, the web video conferencing tool, was installed. His users currently use Skype over the public network to discuss business needs and issues. As Tom explores Skype for Business, he realizes that he can now use it to talk to external Lync/Skype for Business users, Skype users outside of the company, as well as internal RDCC employees. Using Skype, conversations (and text in instant messaging windows) can be recorded (see Figure 2-37). Tom also notices that Skype for Business is an Enterprise voice solution, where both users can speak at the same time. Skype for Business can also replace a desktop phone and it can be placed on a user's mobile devices (laptop, iPad, and smartphone). Tom is pleased to see this, since many new federal regulations require conversation recording to meet compliance rules.



**Figure 2-37.** Skype for Business linking Skype users

Tom looks at how Skype for Business is integrated into Outlook. He can send meeting invites to all employees from Outlook. Tom also discovers that Skype for Business can support external voice conferencing, such as InterCall conferencing. This way, Tom can send out meeting requests and have the meeting as a web conference or as a video conference (see Figure 2-38). Skype for Business allows both sides to talk at the same time, compared to other services where only one person can talk. The ability for multiple people to talk simultaneously is important for enterprise business voice. Tom also asks his Microsoft Partner about Cloud PBX support. Microsoft carries 40% of the world's voice traffic, and Office 365 can be extended with the PBX support. Tom is told to find a solution that not only improved collaboration, but also replaces the existing phone system.

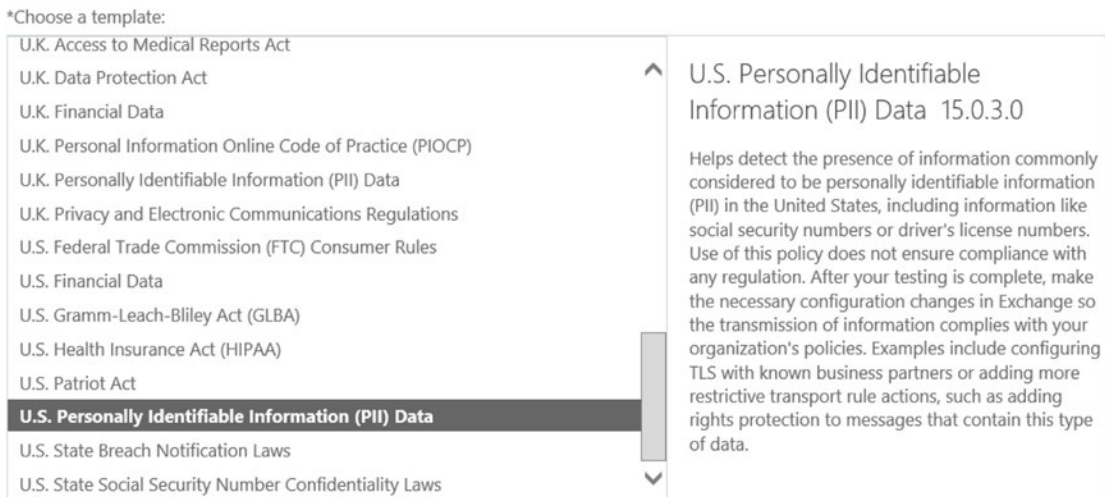


**Figure 2-38.** Outlook scheduling a video conference call using Skype for Business

## Data Loss Prevention

Tom explores additional features in Office 365. One item he wants to verify is what happens if credit card information (embedded in e-mails or documents) is e-mailed externally from RDCC. So he e-mails a test message to an external user, and the e-mail is rejected (not delivered to the external user).

The Microsoft Partner explains that data loss prevention (DLP) is a configured service that is part of Office 365. This service processes an e-mail message's content against various rules. One of the rules that e-mails can be processed against is a personally identifiable information (PII) rule that detects credit card numbers in e-mail and documents. Microsoft supplies a standard set of DLP template rules, but you can also have custom DLP templates built. As an example, if RDCC has internal proprietary information, you can construct a Word template for those documents, as well as an appropriate DLP rule that manages the information so that it is not e-mailed externally. This way, RDCC has maximum control (as much as possible) over its external communications to ensure that only appropriate information is delivered. The Partner shows Tom the available DLP rules (see Figure 2-39), which can be easily added to Office 365.

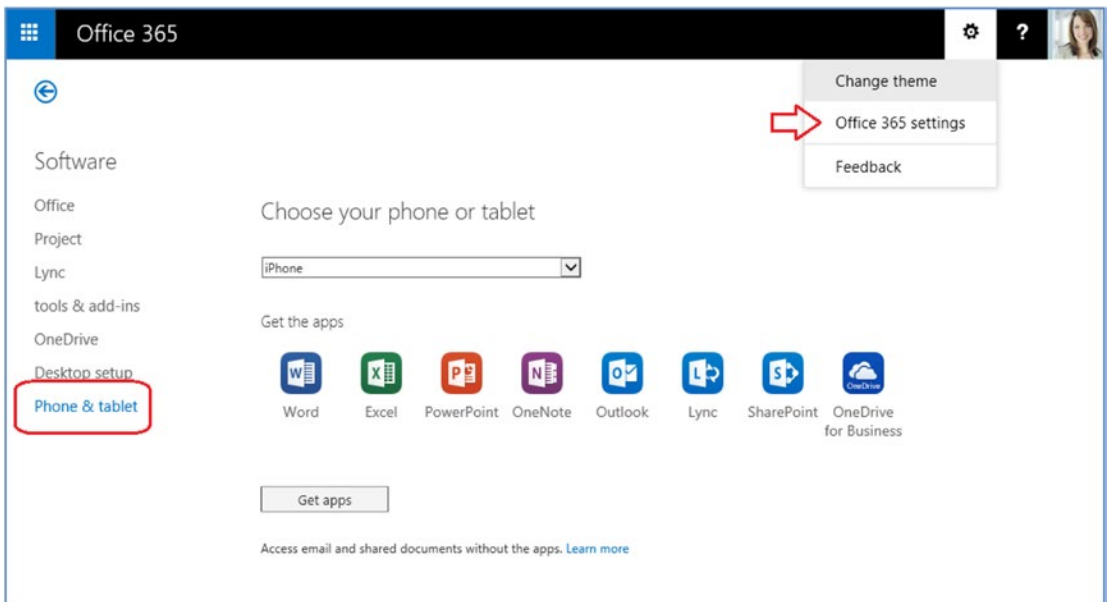


**Figure 2-39.** Office 365 data loss standard rules

Tom thinks about his business requirements and the services that are part of Office 365. When he looks at the overall costs, Office 365 makes business sense and it reduces his overall expenses. With the different licensing models, Tom has the flexibility to purchase the services on a monthly invoice, or on a yearly invoice through a traditional reseller.

## Device Configuration

Tom has been having a lot of problems configuring smartphones. The next area Tom looks at is smart-device support. With everything else that he has experienced, he is not surprised to see that his iPhone is fully supported by Office 365, as well as Android devices and iPads (see Figure 2-40). Tom accesses the iPhone software by selecting the gear icon (next to the picture of Karen in the right-hand corner), and then the Office 365 Settings and the software he wants to download. Office 365 supports the major smartphones. This resolves one of the other issues that Tom was facing. The VP of sales is an avid iPhone and Mac user. Tom is relieved that Office 365 supports iPhone, iPad, and the Mac as part of the standard offering.

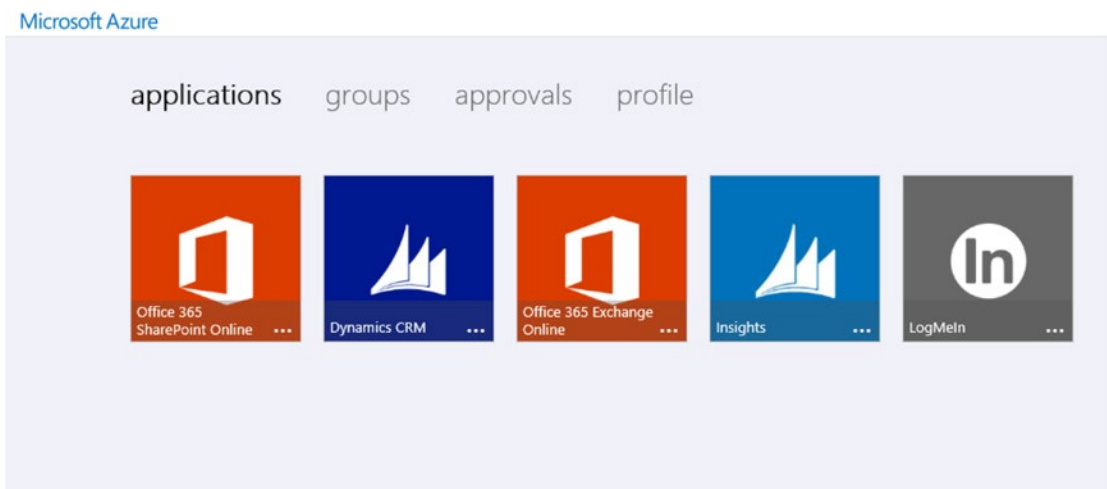


**Figure 2-40.** Selecting the iPhone software to install from Office365

As Tom looks over Office 365, he becomes aware of its different configurations. Office 365 is a cloud-based service that does not discriminate the manufacturer of the user's device. Tom's users have iPhones, Macs, PCs, laptops, and Chrome notebooks. He sees that Office 365 supports all of these devices.

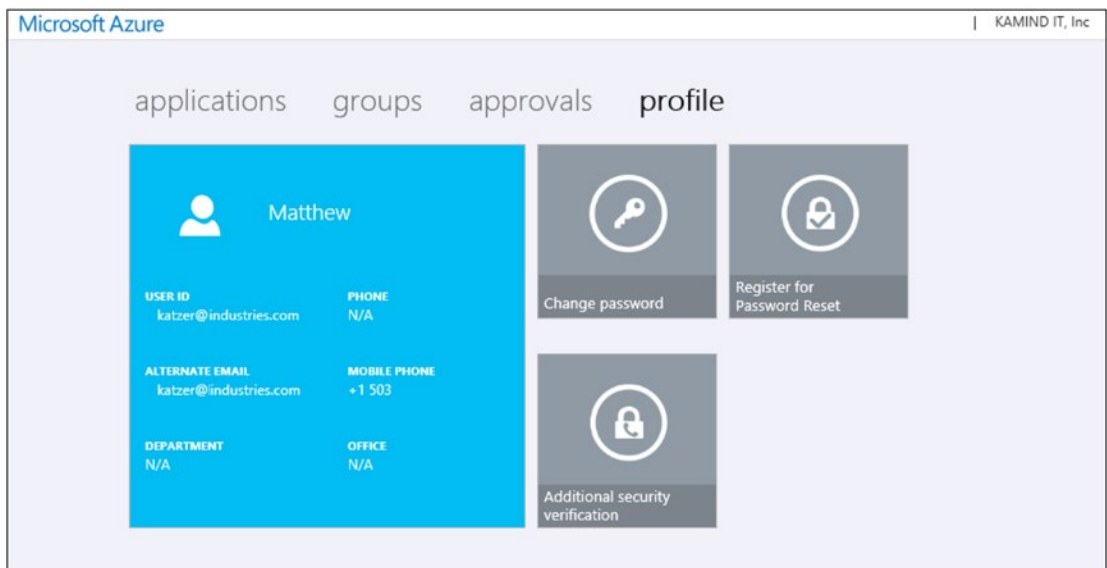
## Office 365 and Enterprise Mobility Suite

Tom looks into the security in more detail and realizes that he can use either his on-premises servers' Active Directory to manage security, or the Office 365 security groups to grant permissions. As an IT manager, Tom must have maximum flexibility to restrict information as appropriate for individuals' roles. The Microsoft Partner suggests that Tom review Microsoft's Azure Active Directory integration (see Figure 2-41). Through the web site at <https://myapps.microsoft.com>, Tom uses his Office 365 test account to access the portal. Once logged in, he notices that there are four tabs and a set of applications that correspond to the business applications in Office 365.



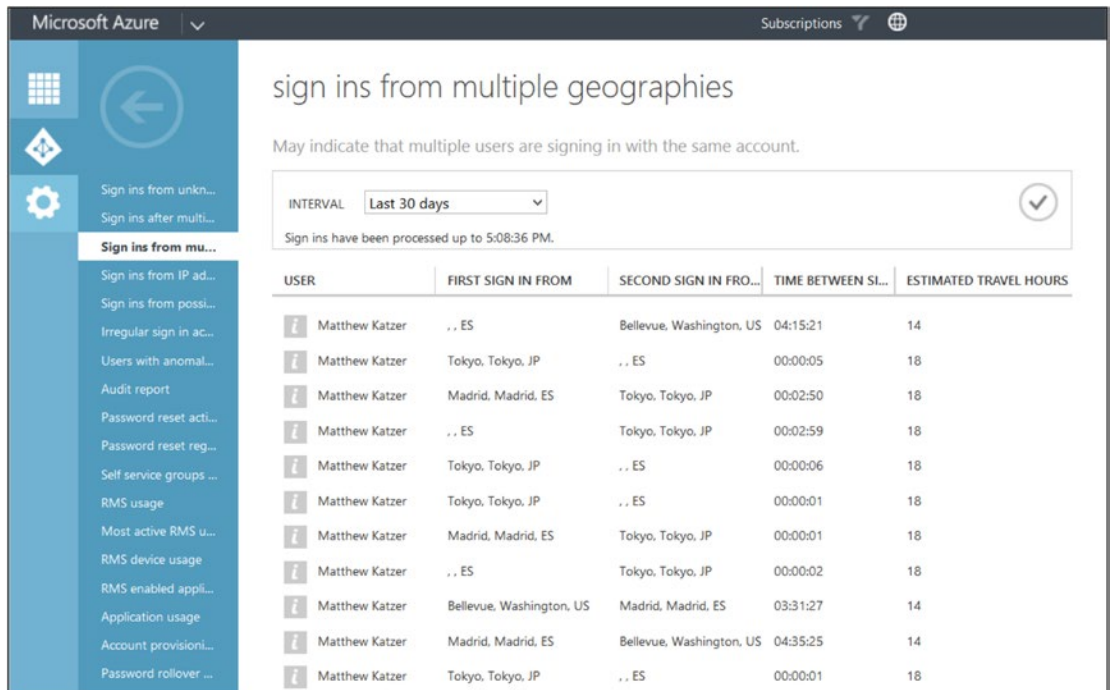
**Figure 2-41.** Microsoft application portal (*myapps.microsoft.com*)

The Microsoft Partner explains that once you enable the Azure Active Directory interface and deploy the Microsoft Enterprise Mobility Suite, there are additional security features available to the user. For example (see Figure 2-42), Tom uses LogMeIn Rescue for desktop management. The Partner explains that he can link third-party cloud accounts and give permission to the user to access the account, without giving the password to individual users. Once Tom configures the password, all he needs to do is grant user access to the third-party cloud services app.



**Figure 2-42.** Windows Enterprise Mobility Suite self-service portal

The Enterprise Mobility Suite also provides additional security analytics that can be used to log information about an account. In Figure 2-43, Enterprise Mobility Suite (EMS) has been enabled to provide a monitoring function on access to the Office 365 tenant. In this example, Azure audits login to the cloud from different geographies. This way, Tom can monitor an account that has been breached.



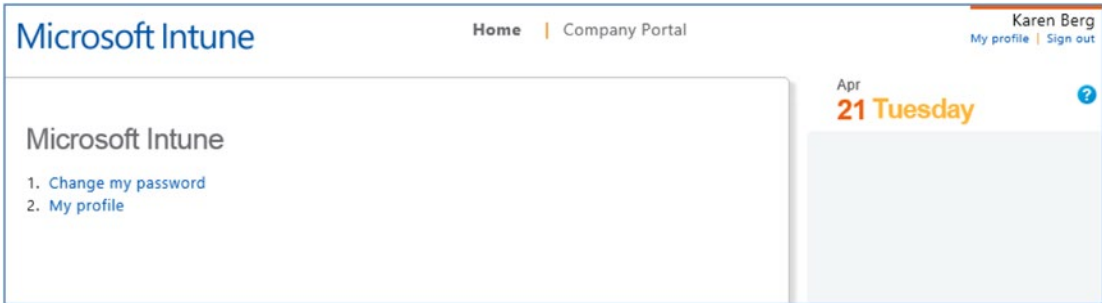
**Figure 2-43.** Azure account management portal

Azure Active Directory is integrated into Office 365. This makes it simpler to have a single sign-on for RDCC users. When an on-premises server is integrated into Office 365 (using any Active Directory integration tools), the security objects are also copied into Azure. Tom feels that with this integration approach, he can manage the user security access using either on-premises services or Office 365. For example, Tom was thinking of placing the accounting line of the business in a Virtual Windows Azure Server and integrating that server into Office 365 Active Directory. Tom accesses the self-service portal by looking at `mypass.microsoft.com` and logging in to Office 365/Azure with his Office 365 account.

RDCC's long-term strategy is to remove all on-premises servers and move them to the cloud. Tom feels there is no longer a business need for an on-premises Active Directory server. After looking at Azure Active Directory integration and virtual server management, Tom recognizes that he may accomplish the server migration to the cloud as part of the RDCC move to Office 365. This will significantly reduce RDCC's operating costs. Tom makes a note of this to discuss with the Microsoft Partner after the migration to Office 365 is completed.

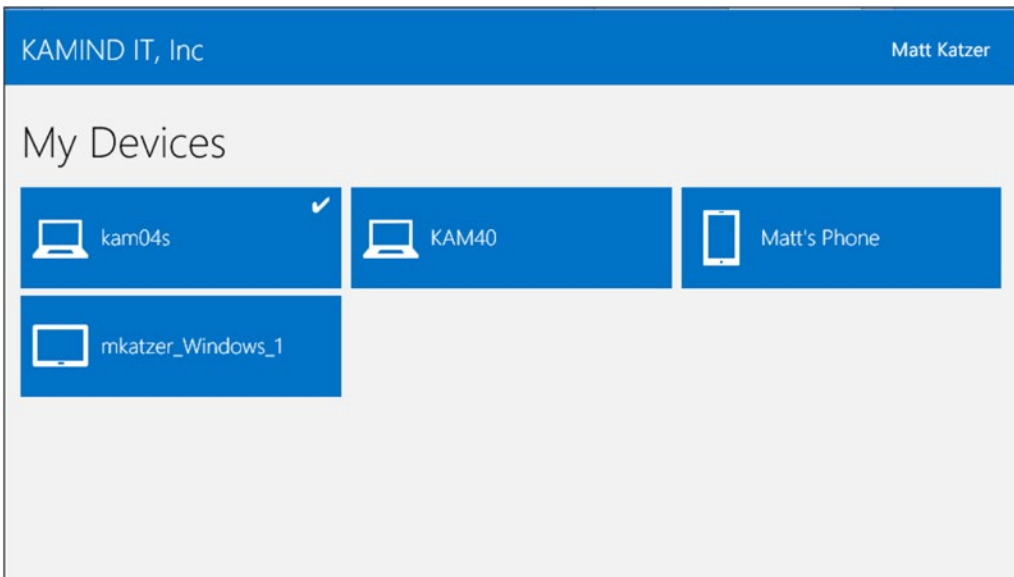
## Microsoft Intune

Enterprise Mobility Suite includes both Microsoft Azure Premium and Microsoft Intune. The Microsoft Partner suggests that Tom look at Intune, so Tom enters the URL (<https://account.manage.microsoft.com>) and starts to access the service (see Figure 2-44). The Microsoft Partner remarks that Intune is an integrated service that uses Office 365 Active Directory to manage desktop and mobile devices.



**Figure 2-44.** Intune user page at [account.manage.microsoft.com](https://account.manage.microsoft.com)

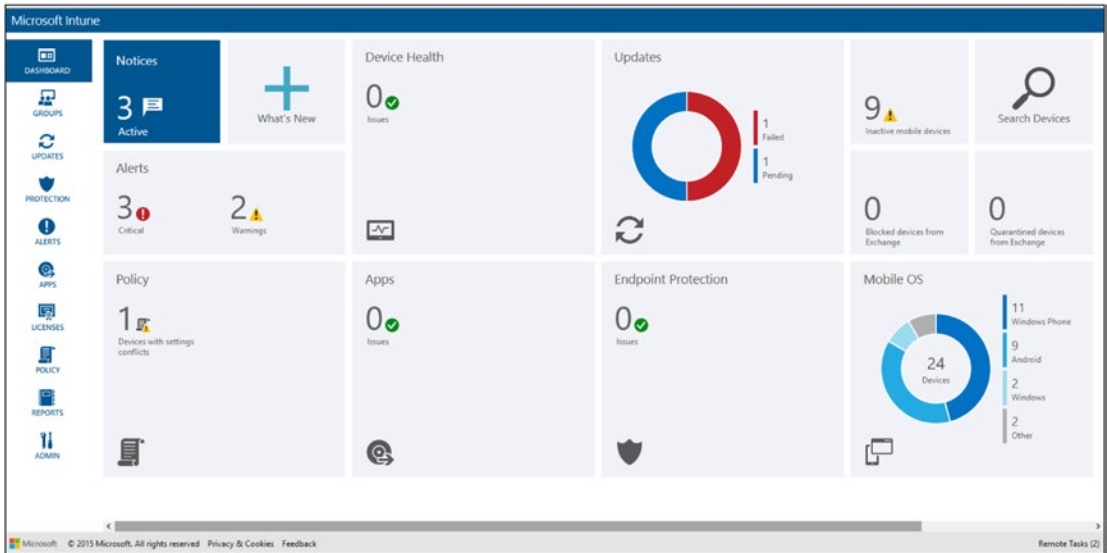
Intune allows an IT department to fully manage users' mobile devices and desktop devices with antivirus, policy management, updated management, and hardware and software inventory management. Intune monitors end-user devices and sends notifications to the administrator when there are issues associated with the user's system. Tom looks at the Start screen and proceeds to log in to the company portal (see Figure 2-45).



**Figure 2-45.** Microsoft Intune company portal

The Microsoft Partner explains that Intune is designed for the IT staff to reduce the cost of desktop management deployment. Intune has a self-service portal that allows users to register their devices (mobile, laptops, desktop) into the Intune deployment center. This allows IT staff to manage those systems. Intune also supports custom application deployment for mobile devices. Controlling the deployment of custom applications is a key benefit for RDCC, because they no longer need to publish the mobile application to the public cloud.

Tom looks at what Intune can do. He briefly looks at the admin center (see Figure 2-46) to see how the mobile devices are managed. Tom discovers that he has the ability to remotely wipe the portions of an employee's cell phone that contains customers' information, if the employee leaves the organization.



**Figure 2-46.** Intune administration console

## Summary

Using a “walk-through” approach has exposed you to the different capabilities of Office 365 from a very practical point of view of how you use the features. There is much more to Office 365 than we discussed, and we will cover that information in subsequent chapters. At this point, if you have a trial subscription, you are ready to try Office 365.

## Reference Links

There is a lot of information about Office 365 on the Web, but the issue is finding the right site. The information contained in this chapter is a combination of our experiences in doing deployments and knowledge of support information that has been published by third parties.

**Office 365 Learning Center**

- <http://office.microsoft.com/en-us/office-home-for-office-365-FX102821134.aspx>

**Office 365 Cloud Solution Provider Information**

- <http://www.kamind.com/csp>

**Adding OneDrive for Business for Office 2010 and 2007**

- <http://www.microsoft.com/en-US/download/details.aspx?id=39050>

**Adding FastTrack information to your Office 365 Company**

- <http://fasttrack.office.com>

**Update information from Office 365: Migrating and managing your business in the cloud**

- <http://mattkatzer.com>

## Next Steps

Your Office 365 systems have been set up and configured. At this point, you understand the features of Office 365 and you are ready to move forward. However, your work is not yet complete. There is more to do, depending on your Office 365 configuration. It is recommended that you review Chapters 3, 4, 6, and 7 in preparation for deployment.

*Chapter 3: The Apps.* Office 365 is owned by the business, and the data is only available to the business for business use. Office 365 takes advantage of social enterprise through the different data mining capabilities that are present in services like Gmail, Dropbox, Facebook, LinkedIn, and other social media sites. Those capabilities are applied to your Office 365 site to improve your business productivity. This chapter describes Office 365 apps and discusses how you use them in your business to improve communications and productivity.

*Chapter 4: Cloud Security Best Practices.* One of the issues that all managers are faced with is the management of data and security and learning best practices. In this chapter, you explore the different capabilities of Office 365 and the monitoring that is in place to manage your Office 365 company to ensure that your data remains private. This chapter covers the most common approaches to Office 365 migration.

*Chapter 6: Workstation Setup and Configuration.* Office 365 supports many different systems and capabilities, depending on your business needs. The issue that IT managers constantly face is how to setup and manage the client environment. This chapter is focused on the configuration of an Office 365 desktop environment. This is the go-to reference chapter on the configuration of your desktop and mobile phones.

*Chapter 7: Managing Office 365.* This chapter describes the different administration centers in Office 365 and the most common tools that you use to administer Office 365. Depending on your Office 365 plan, there are five possible administration tools. This chapter focuses on the Office 365, Exchange, and Skype for Business administration centers. The chapter closes with using PowerShell to manage your Office 365 environment.