



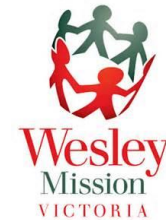
# **MICROSOFT OFFICE 365**

# **IMPLEMENTATION CONSIDERATIONS**

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3<sup>rd</sup> August 2017

Infoxchange is a not for profit organisation that has supported hundreds of non-profits to move to the Office 365 cloud including:



Post  
Placement  
Support  
Service



# Session objectives – Office 365 implementation considerations

Today's objective is to provide participants with an overview of Office 365 and its range of applications and what to consider before and during implementation. Key topics of today's webinar include:

- The full suite of Office 365
- Licensing and paid add ons
- Requirements and use cases
- Building the business case for Office 365
- Overview of key applications
- Which application to choose?
- Mobility with Office 365
- Change Management and improving adoption
- Infrastructure considerations

We will also provide an opportunity for people to ask questions throughout the session through the chat window and ask at the midway point and end of session.

This webinar will be recorded and all participants will receive access to the recording and slides.



# What is Office 365?



Office apps and  
Office Web apps



Always up to date



Optimized experiences  
for common devices



Reliable service  
with a 99.9% SLA



Advanced IT controls  
and configuration



Industry trusted  
certifications



# What do you get in your free E1 plan?



## Office 365 Nonprofit E1 or E2

Designed for organizations of all sizes (unlimited users)

24/7 IT-level phone support for critical issues

Available as a donation to qualifying nonprofits

50GB Exchange mailbox per user

1TB OneDrive storage per user

1TB storage per organisation plus 500mb per user

Basic mobile apps (Office apps are read only)

Office Web apps only (Word online, Excel online etc)





# Popular paid add ons (as well as E1)

Plan	Function	Cost per user per month (\$AUD)
Office Pro Plus	Office 2016 Pro desktop and mobile apps (5 devices). Monthly payment using click to run install	\$2.90
Business Premium	Office 2016 standard for small organisations (under 300)	\$2.86
E3 Plan	Office 2016 desktop, legal hold, encryption	\$6.71
E5 plan	Office 2016 desktop, PSTN conferencing, PABX	\$14.74
Enterprise Mobility Suite	InTune, Azure AD Premium	\$2.80
Advanced Threat Protection	Protection against malware	\$0.84
Project	Project mapping, gaant chart, task management	\$16.83
Visio	Process mapping, charts, diagramming	\$7.04
Power BI pro	Administration of Power BI	\$3.80

<https://products.office.com/en-au/nonprofit/office-365-nonprofit-plans-and-pricing>



# THE PERIODIC TABLE OF Office 365

*App availability depends on license type*

Provided services include: Office 365 Groups • Enterprise Search • Microsoft Graph • MyAnalytics • Security & Compliance • Plus More



\*Items in [brackets] identify software with similar functionality for the sake of context

# Determining requirements and use cases

1. Who will be using the tool?
2. What is their key reason for accessing it?
3. When will they login?
4. What device will they access information from?
5. What information will they be looking for?
6. What tone/style would they expect?
7. What type of content will they feel comfortable sharing?
8. Are they comfortable using this type of technology?
9. What would motivate them to use it?
10. What does success look like?





# Building the business case for Office 365



## **Reduce or eliminate server upgrades and refreshes**

saving IT support and server costs



## **Use videoconferencing applications & teleworking structures**

which provide flexibility and reduce travel costs



## **Defend against hardware failure**

with cloud solutions so there's no need to worry about your server failing and your data is protected in the cloud



## **Collaborate effectively**

across all locations leading to increased efficiency

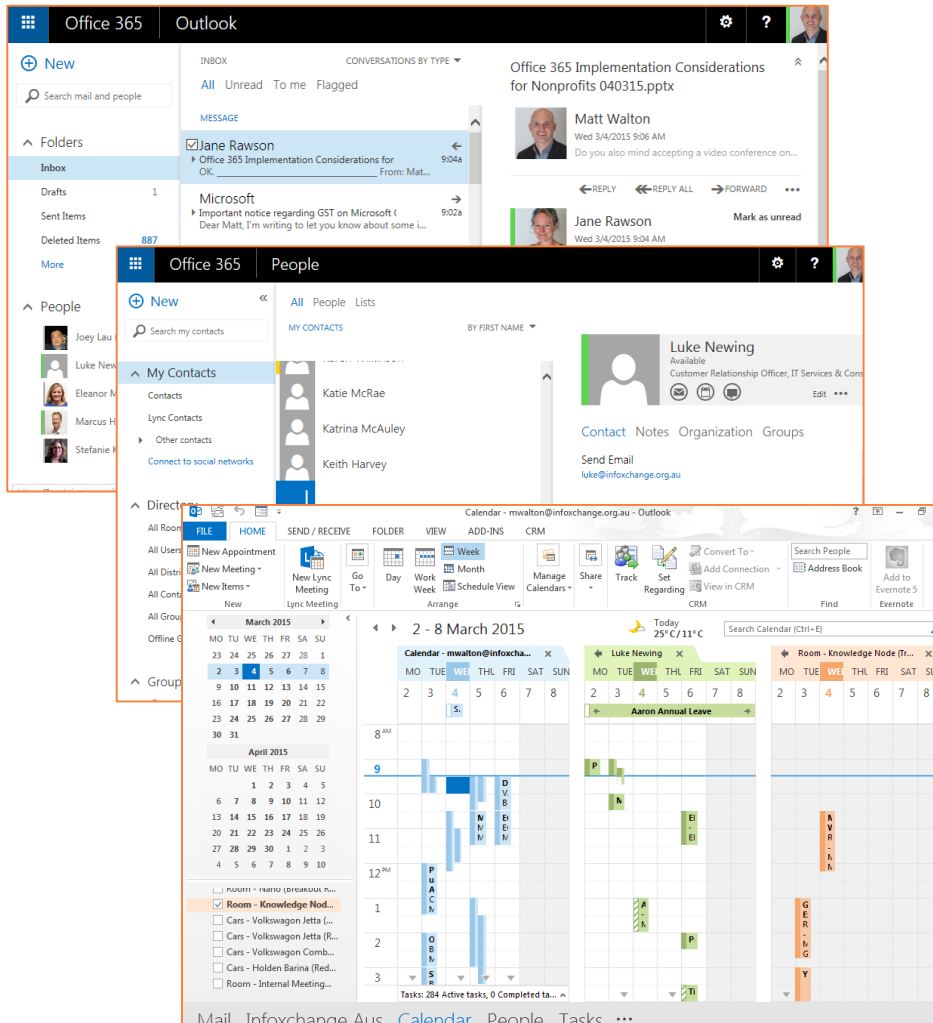


## **Create a single source of truth**

for information which saves time looking for files in different locations



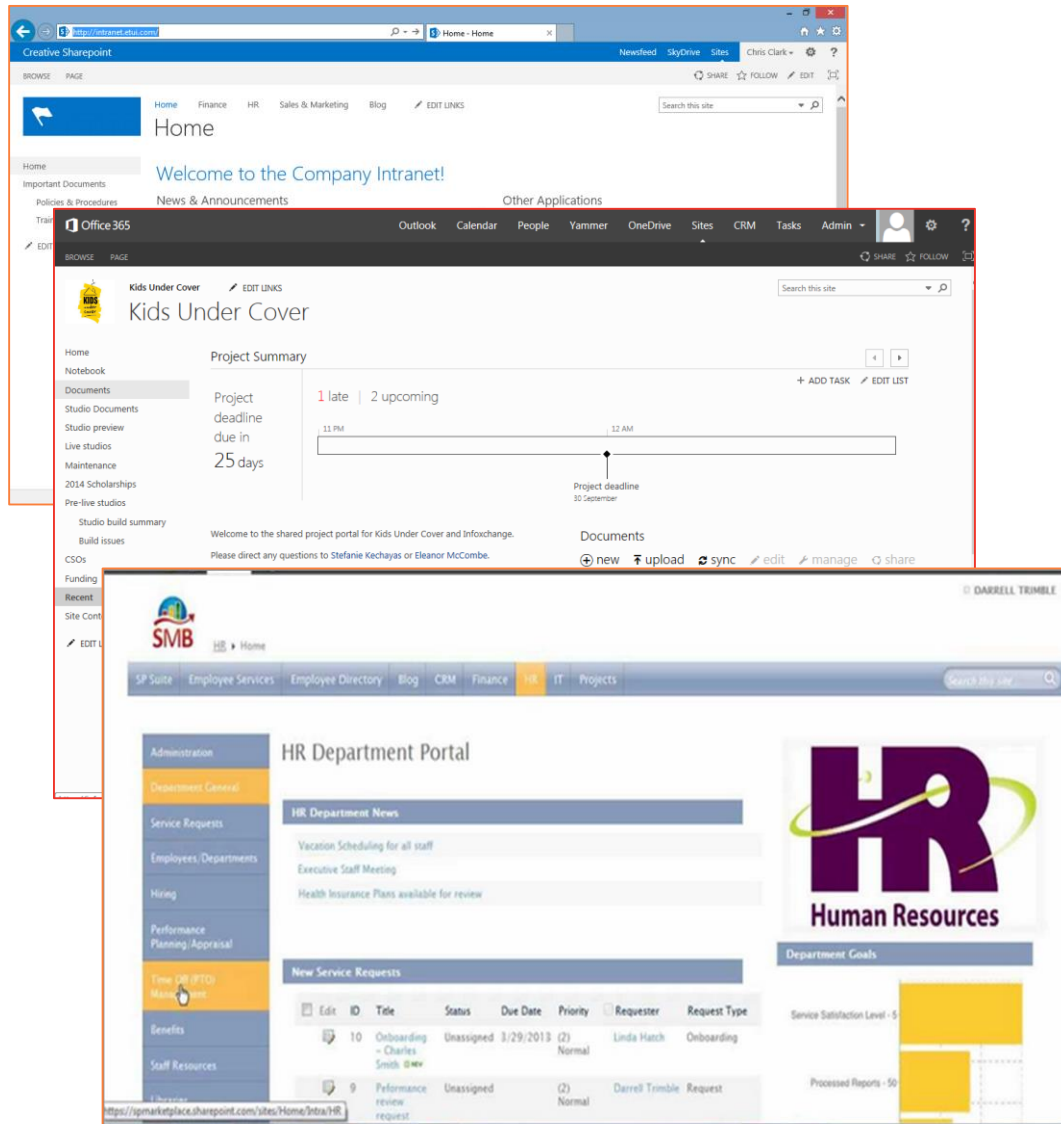
# Exchange Online



1. Replace on premise Exchange servers, Gmail or hosted systems
2. Unlimited mailboxes with 50Gb each for staff and volunteers
3. Shared and generic mailboxes
4. Shared resources to book (rooms, cars, devices)
5. Contacts, distribution lists and external contacts
6. Calendar sharing
7. Need to migrate content from existing system and approach varies in effort and cost depending on current system



# SharePoint Online



1. Great for a company Intranet (large orgs)
2. May be used as file server replacement (small orgs)
3. Different from a file server and may need to consider local storage for large or complex files
4. Permissions and version history on all documents
5. Co-authoring and collaborative editing of documents
6. Forms and lists for admin processes
7. Team /project sites for collaboration
8. Consider change management /training
9. Consider information architecture
10. Use non technical staff for implementation
11. Synchronisation with desktop for offline access
12. Use Office 2016 for full features



# OneDrive

Previously SkyDrive Pro / OneDrive Pro



- 1 TB Per User (free)
- Not Expandable
- Every file is “owned” by a user,
- Sharing functionality (although not always recommended)

Also known as “Team Sites”



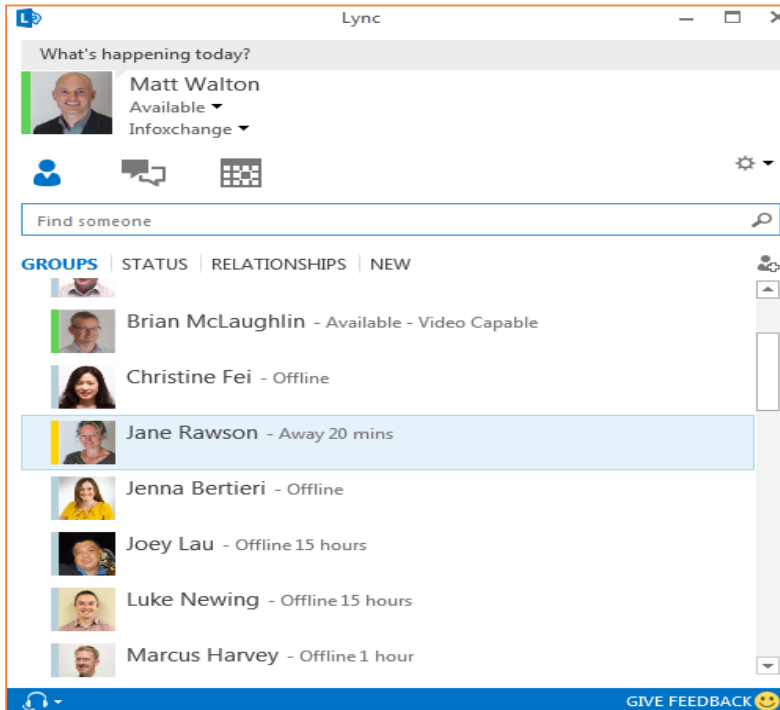
- 1 TB + 500mb per license (free), expandable (\$)
- Store files, calendars, contacts, and more
- Data is centrally managed, intended for shared files



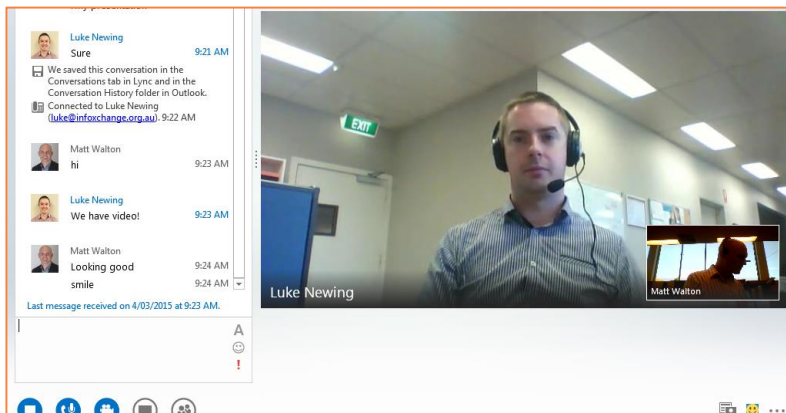
Files can be taken Offline with OneDrive Desktop Client



# Skype for Business

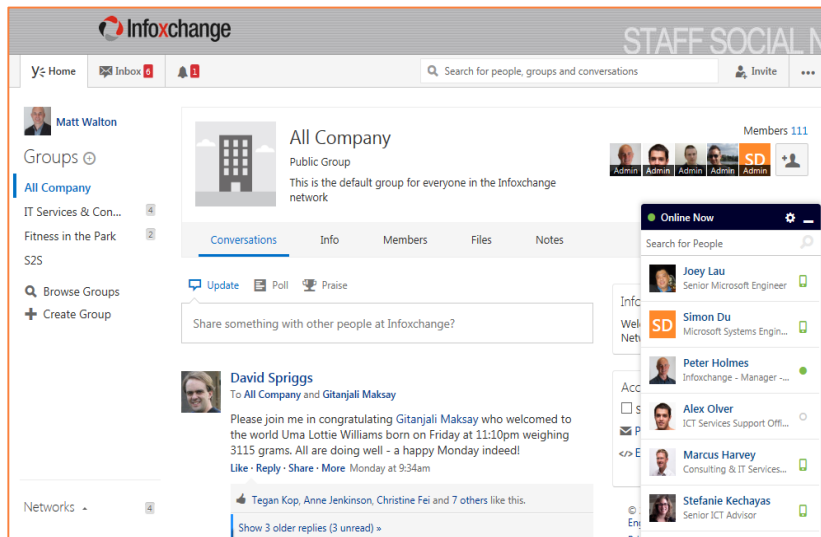


1. Previously called Lync
2. Different but similar and partially integrated with personal Skype
3. Use Skype for Business (Office 2016 Pro Plus) and new for Macs
4. Great for point of presence and staff messaging
5. Use headsets for audio
6. Consider enabling external contact sharing
7. Dial in number (PSTN) available now with e5 license
8. Cloud PABX out in 2017 to replace phone system



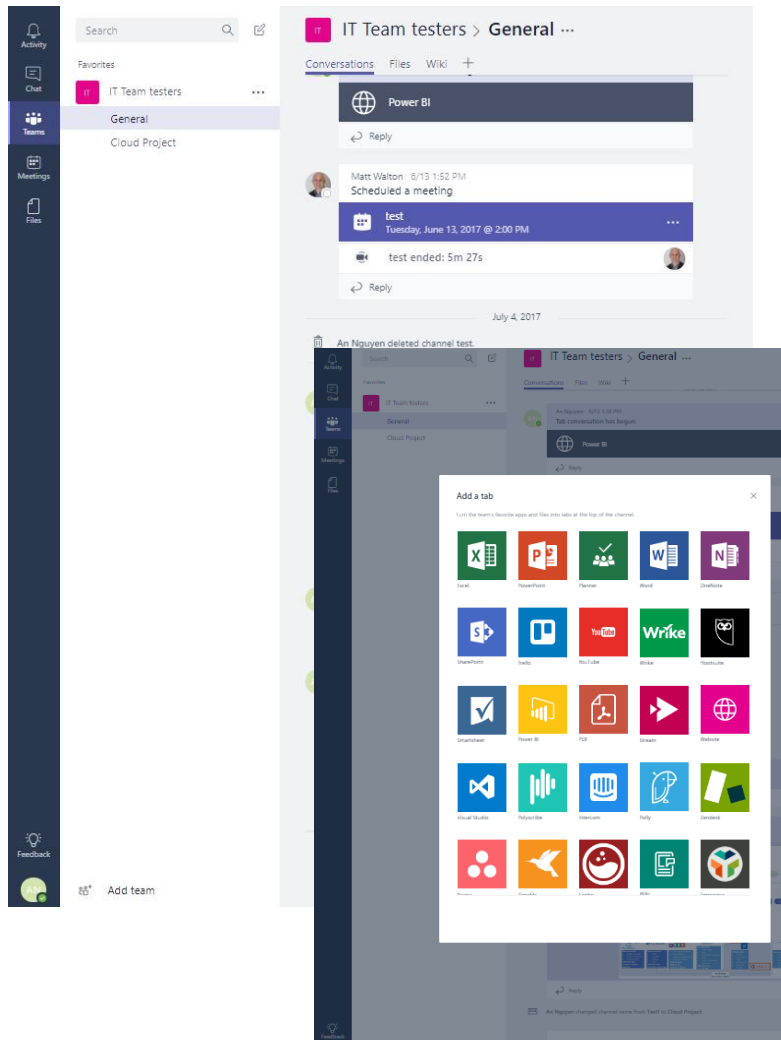


1. Facebook for business
2. Discussion forums
3. Great for larger or diverse organisations
4. Create groups for each team/topic
5. Good notifications to email
6. Consider an external network for clients
7. Add a feed in your SharePoint site
8. Easy external access
9. Integrated with Groups
10. Encourage CEO to post content
11. Consider other collaboration platforms (SharePoint, Teams etc)





# Teams

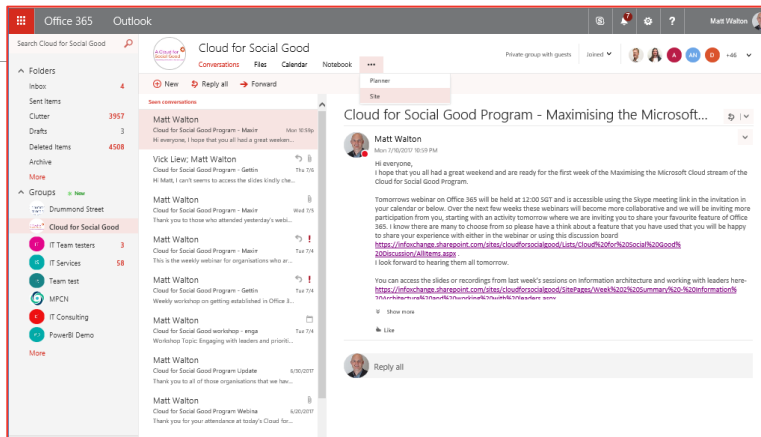
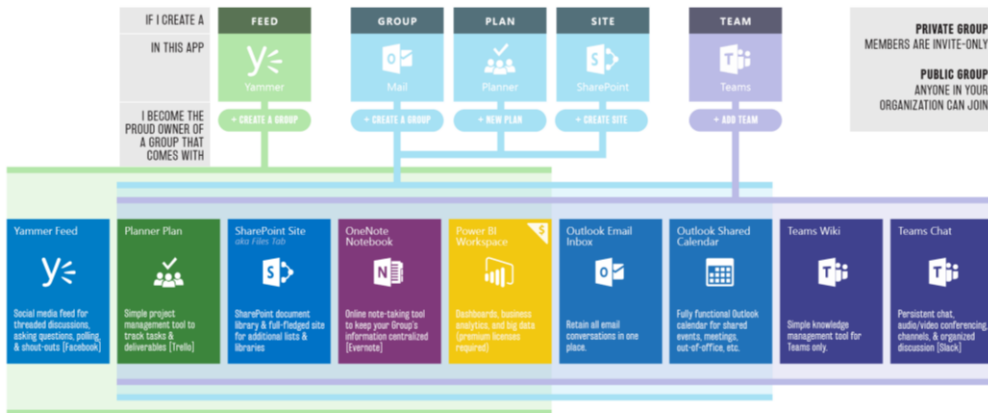


1. Team workspace (similar to Slack) available in Browser, on Desktop and on Mobile devices
2. Easy access to Word, Excel, SharePoint, OneNote, Planner and Power BI
3. Team and private 1:1 conversations – chat, audio and video call. Emojis ♥, memes, stickers for the team too!
4. Highly customisable tabs, connectors and bots from MS and third party partners.
5. Consider architecture prior to implementation
6. Consider other platforms eg SharePoint, Yammer, Groups



# Groups

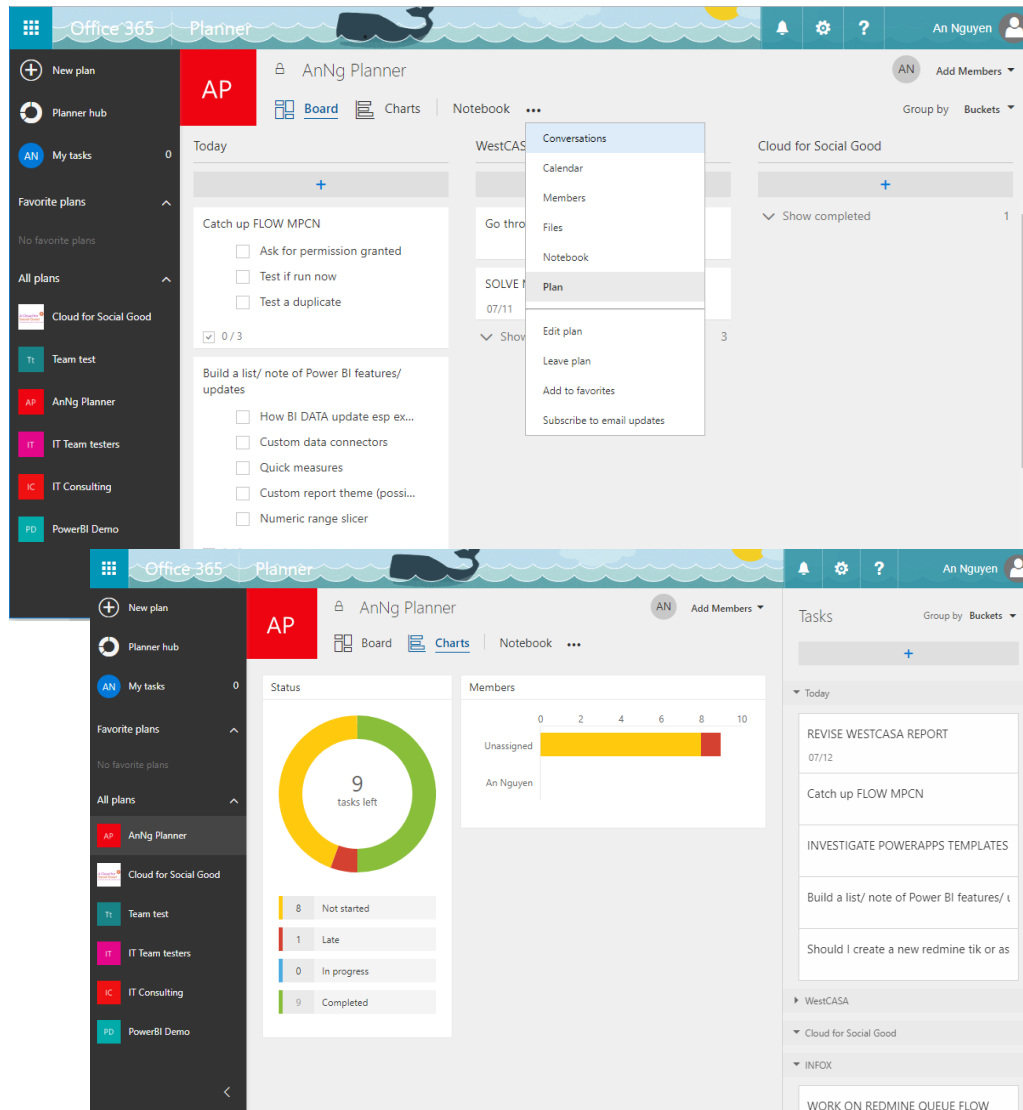
## AN EVERYDAY GUIDE TO Office 365 Groups



1. Cross applications eg SharePoint, Teams, Exchange
2. Private or public groups
3. Replaces traditional email distribution list
4. Accessible through Outlook, web or Yammer or Teams
5. Creating a Group creates a site, planner, calendar etc
6. External sharing functionality eg boards or multi org projects



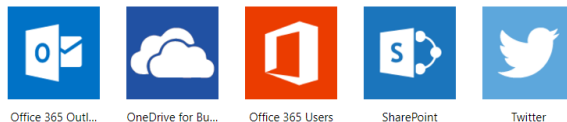
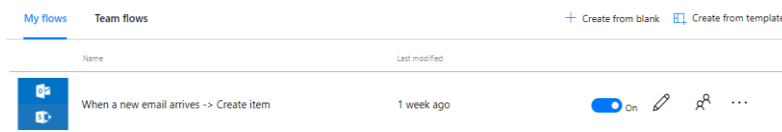
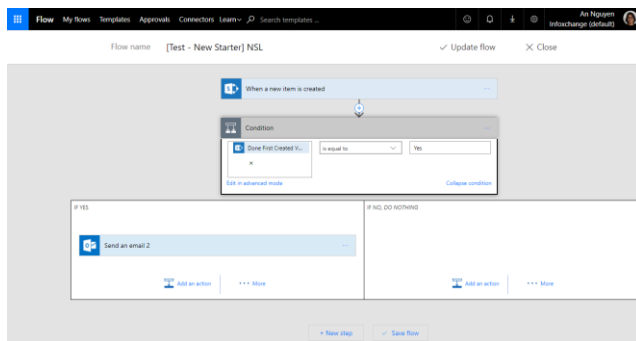
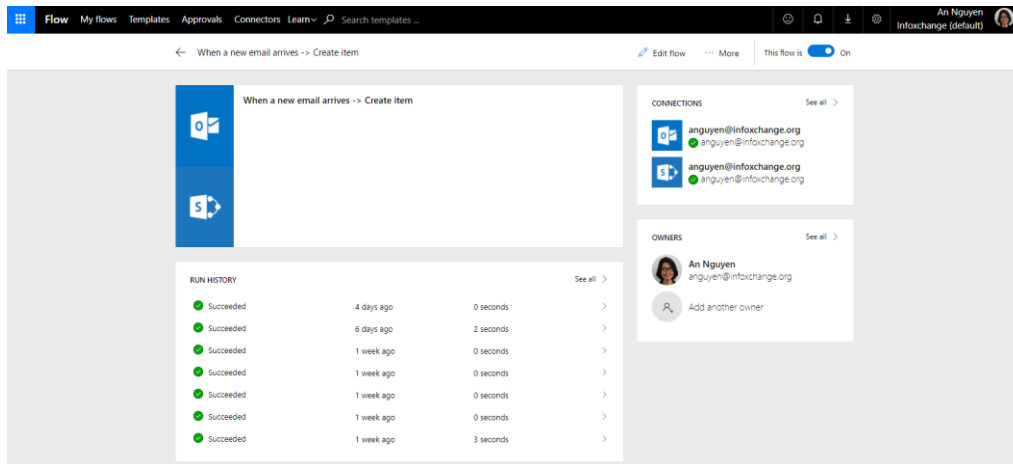
# Planner



1. Project Management Tool (Similar to Trello)
2. Good for Agile style project management
3. Integrates with Groups and Teams
4. Not integrated with Outlook or SharePoint
5. Summary views and analytics of tasks across projects and teams



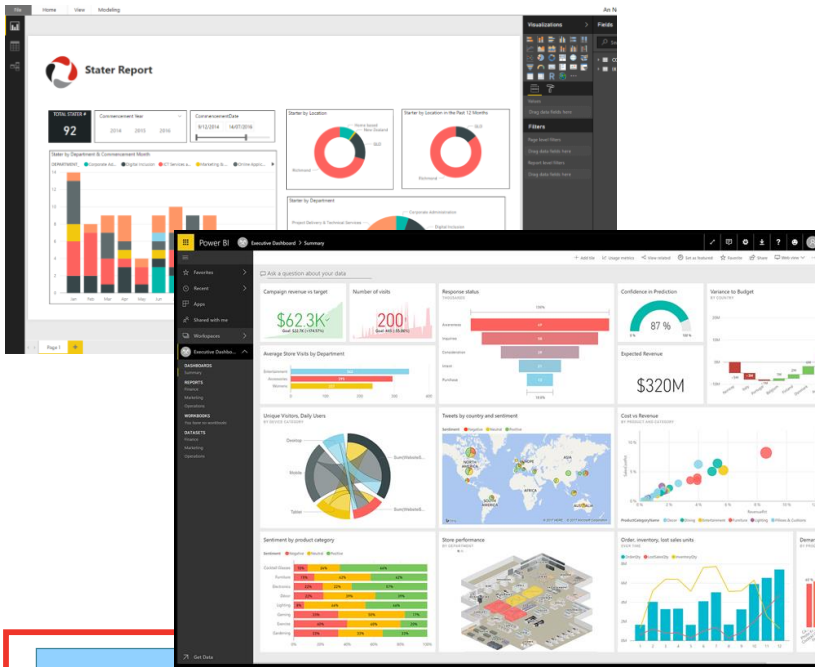
# Flow



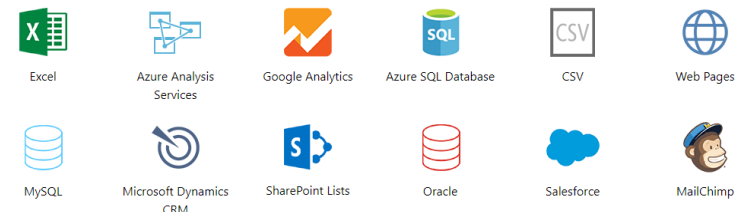
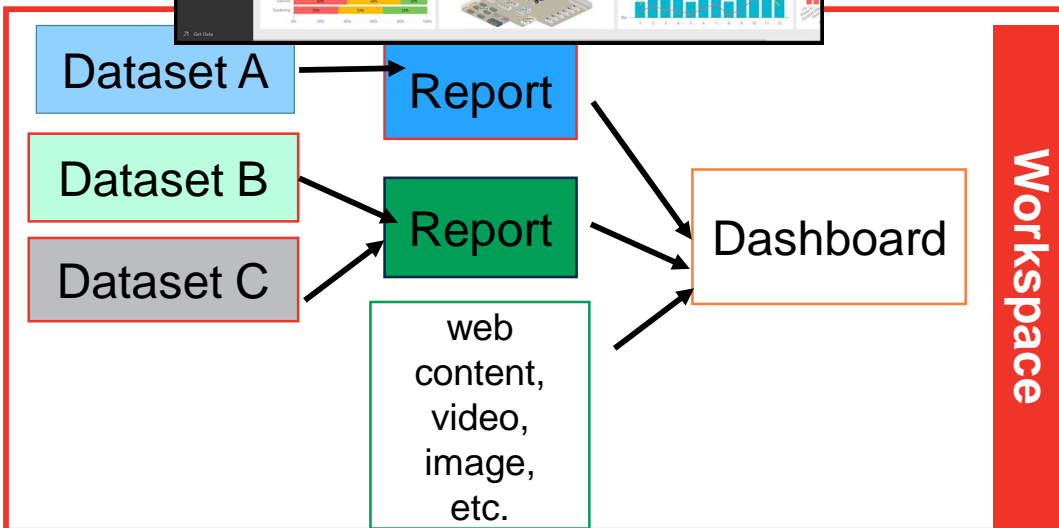
1. Automated workflow tool across Office 365
2. Templates available or build from scratch
3. Automate repeatable actions
4. Integrates with Teams, SharePoint and over 100 third party apps
5. Flows can automate:
  - a) Approval
  - b) Notification
  - c) Data transfer



# Power BI



1. Data analytics service
2. Creation of dashboards and data visualization
3. Connects to variety of data sources including Excel, Sharepoint, SQL and Azure
4. Display data through app, web or SharePoint



# PowerApps



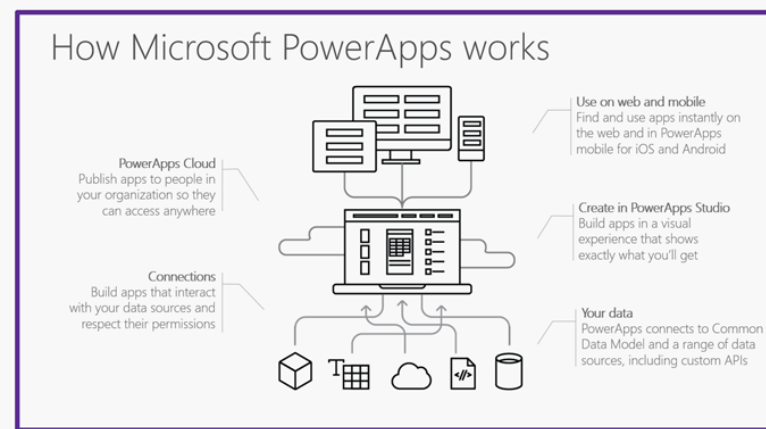
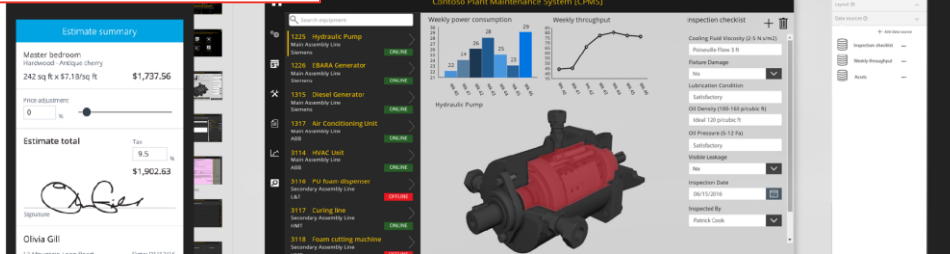
< One on One Booking Calendar

Meeting Date & Time

Booking Status

Name

Email

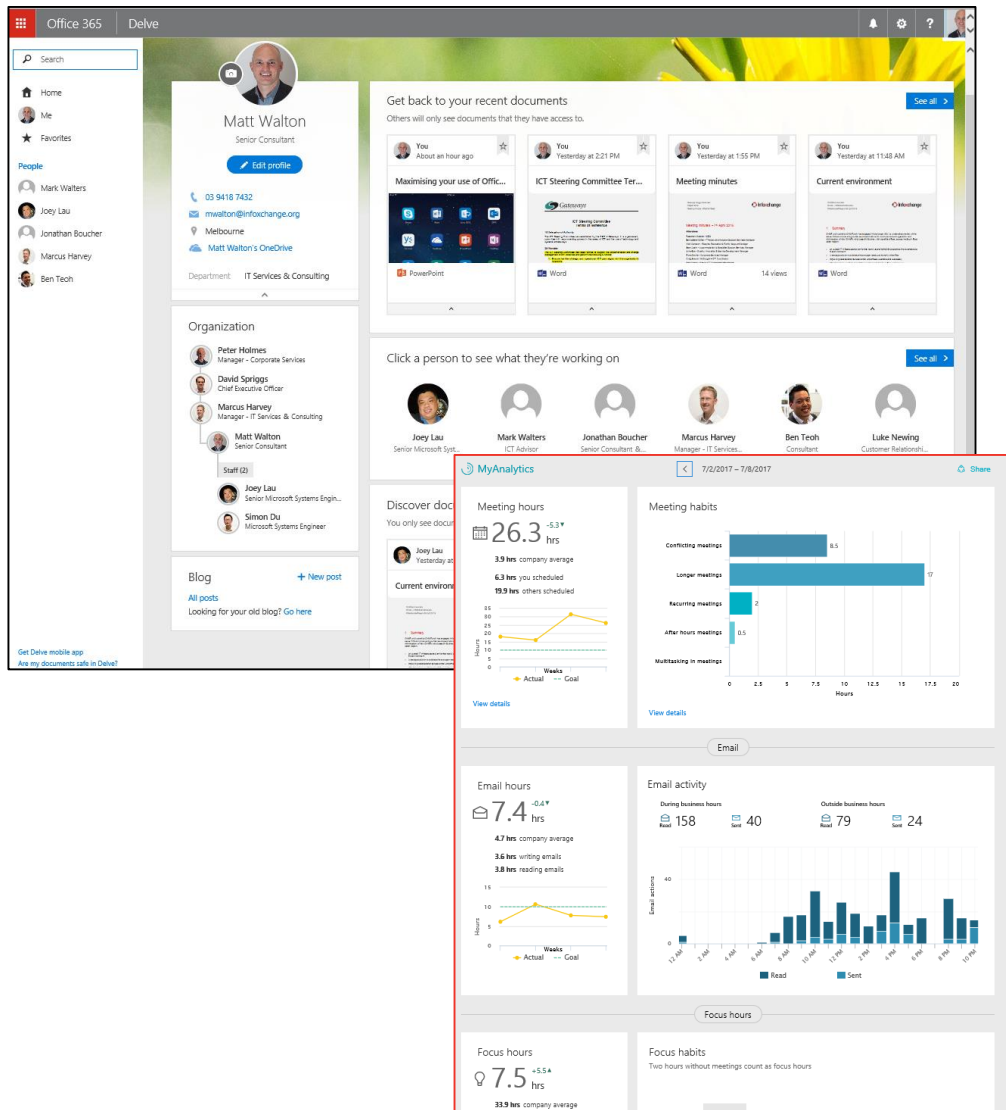


1. Allows users to create and use custom business apps across different platforms.
2. Used for data presentation, management, and collection.
3. Suitable for on the go mobile users, frequently working on phones or tablets.
4. Apps can connect to multiple data sources (SharePoint, Dynamics 365, OneDrive, Salesforce, etc.)
5. PowerApps apps can connect to Flow and Power BI too!





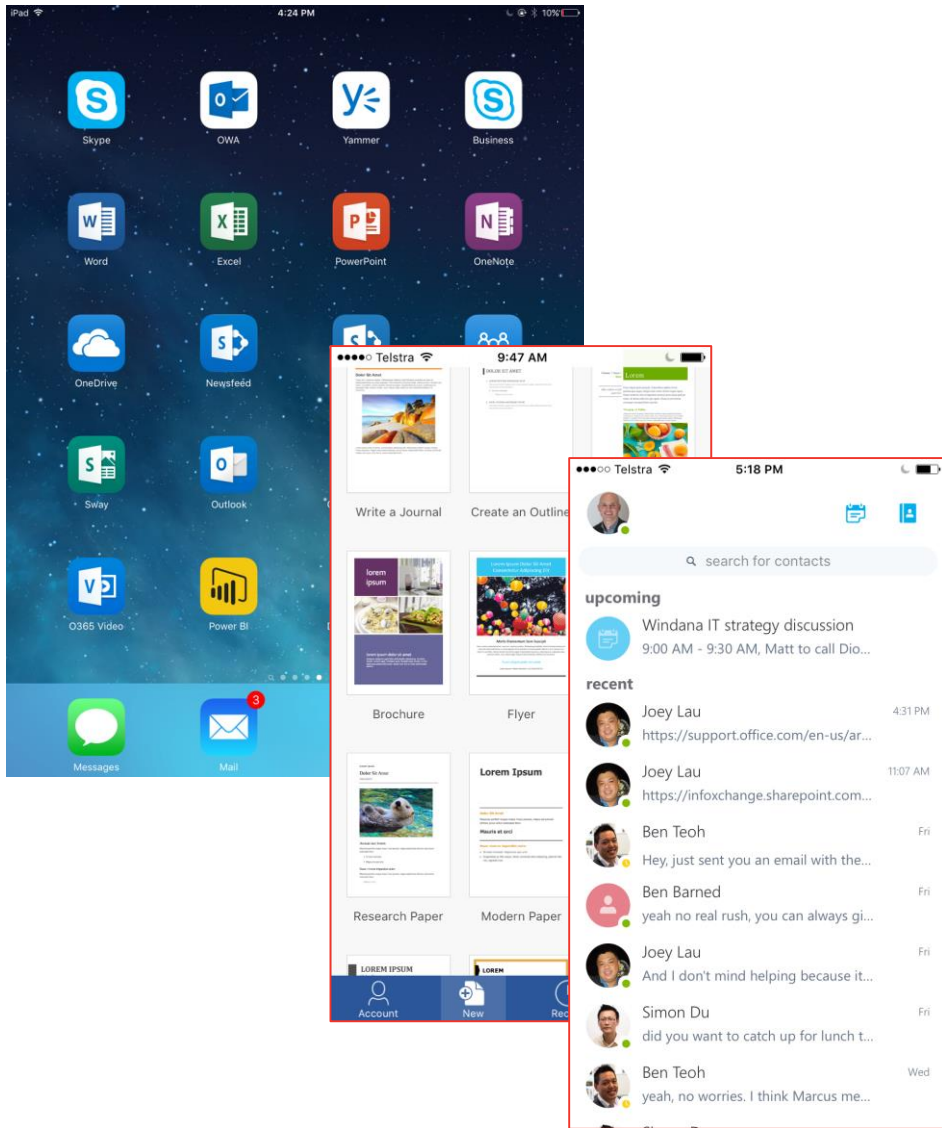
# Delve



1. A new way to search and find
2. Discover and access what colleagues are working on
3. User profiles and blogs
4. Cross application view (Exchange, SharePoint, OneDrive)
5. My Analytics to understand work practices
6. No configuration required



# Mobility



1. Mobile apps for all devices (ios, android, windows)
2. Office on up to 5 devices with Pro Plus or e3 license
3. Basic read only versions of apps with e1 license
4. Consider the Enterprise mobility suite (\$2.80) or MDM (free)



# Which Office 365 application to use?

Purpose	Application
Email, Calendar sharing, resource booking, basic tasks	Exchange Online
Discussion and Collaboration in Groups	Yammer or Groups
Intranet and document collaboration for staff and/or boards	SharePoint
Messaging / video conferencing	Skype for Business or Teams
Discussion with clients or external stakeholders	Yammer or Groups
Basic editing of documents from a web browser	Office online / OneDrive
Daily work (offline or online) on documents, spreadsheets, notes	Office 2016 Pro Plus
Collaboration on tasks, documents, calendar in teams or topics	Teams or Groups
Storage of individual's documents with some basic sharing functions	One Drive for Business
Accessing emails, calendars, contacts from mobiles	Outlook app
Accessing organisational chart information or colleague contact details	Delve
Managing projects or tasks	Planner or Tasks



# Ideas for improving adoption by your team

1. Only use the applications that add value
2. Explain the benefits and reasoning
3. Name and brand your Intranet
4. Your CEO should be the biggest advocate
5. Create a network of Power Users/champions
6. Provide casual learning opportunities eg lunchtime Q&A session
7. Incorporate training/awareness of change into regular staff meetings
8. Create reasons for staff to use systems regularly eg login to access payslips
9. Stage the implementation if possible



# Project Staging

Stage 1 : Business Case and approval

Stage 2 : Review and scoping

Stage 3 : Prepare your environment

Stage 4 : Change management activities and planning

Stage 5 : Intranet and collaboration platform architecture and design

Stage 6 : Pilot, demo and testing

Stage 7 : Authentication implementation

Stage 8 : Office 2016 upgrade

Stage 9 : Email migration and Skype for Business

Stage 10 : Groups and Teams for collaboration

Stage 11 : SharePoint build and launch

Stage 12 : Document management migration and training

Stage 13 : OneDrive, Yammer and Video

Stage 14 : Business Intelligence / Power BI

Stage 15 : Mobile Device Management



# Infrastructure considerations





# Additional Office 365 support available

- » Office 365 readiness assessments  
*offered in partnership with Connecting Up & TechSoup*
  - AU - <https://www.connectingup.org/discount/office-365-readiness-assessment/microsoft-office-365-readiness-assessment>
  - NZ - <https://www.techsoup.net.nz/discount/office-365-readiness-assessment/microsoft-office-365-readiness-assessment?action>
- » Office 365 DIY workshops - Basic email, Basic SharePoint, Advanced email <http://www.connectingup.org/sphinxsearch/DIY%20workshop>.
- » Additional ConnectingUp webinars <http://www.connectingup.org/infexchange-webinar-series>
- » Implementation services, migration advice, SharePoint configuration and development
- » Ongoing support and training
- » Microsoft website - <https://products.office.com/en-au/nonprofit/office-365-nonprofit-plans-and-pricing>

Contact: [mwalton@Infoxchange.org](mailto:mwalton@Infoxchange.org) or (03) 9418 7432



# Top tips for using Office 365

1. Only use the applications that add *value* to your organisation and staff
2. Spend time considering and testing *how you use* each platform prior to implementing
3. Explain the *benefits* to staff & support them to make the change; local 'champions' can help staff to make the most of the new features.
4. Ensure your *infrastructure* is suitable including Office 2016, internet connections, mobiles, authentication etc
5. Ensure you *resource* the platform including content creation and have support by either an external provider or train up a staff member



**THANK YOU**

**PLEASE GET IN TOUCH**



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# Internet Connectivity Scenarios

Example Scenarios	Performance & Comments
Single user at home on consumer ADSL2 or 3G (OK signal) using <ul style="list-style-type: none"> <li>e-mail, Skype (IM/audio/video), SharePoint &amp; OneDrive for file sync</li> </ul>	 Generally good. Lync call reliability affected if downloading /uploading large files/emails
Office of 10 people, on business grade ADSL2 using <ul style="list-style-type: none"> <li>Email, Skype (instant messaging only)</li> </ul>	 Should perform appropriately
Office of 10 people, on business grade ADSL2 with <ul style="list-style-type: none"> <li>Email, Skype (IM &amp; intermittent audio calls)</li> <li>Case/client management system in the Cloud</li> <li>One offsite office where people remote in to a local terminal server to use the finance/accounting package</li> </ul>	 Audio likely to drop out & Skype call reliability affected if downloading / uploading large files/emails or significant use of the Internet.
Organisation of 30 staff, 20 in central office, other 10 across 3 remote offices. Central has symmetric 10Mb link, others have business grade ADSL2 with Annex M for improved upload. VPNs. QoS prioritisation <ul style="list-style-type: none"> <li>e-mail, Skype (IM/audio/video), SharePoint &amp; OneDrive for file sync</li> <li>Server for AD. Case/client management &amp; Finance s/w in the cloud</li> </ul>	 Should perform appropriately Without QoS (Quality of Service) network traffic prioritisation, risk of audio & video dropouts exist during periods of high internet traffic
Office of over 50 staff accessing cloud based applications and video conferencing Requires a symmetric connection of approximately 20mb upload and 20mb download. Fibre of 100mb may be also suitable and cost efficient if available at the location	 Should provide a high quality connection enabling access to internet based applications



# What happens when the internet goes down?

## Exchange (Email)

Can still access synced email  
May access new email via mobile devices or from alternate location

## OneDrive for Business

Can work on documents synced locally if OneDrive client is installed  
All changes/edits will be synced once internet connectivity is restored



## SharePoint

Continue to work with documents synced with OneDrive client  
Access documents via Office for Mobile or from alternate locations

## Office Applications

Installed Office applications will be available  
Office Web Apps will not be available  
Web apps on mobile devices will be available



# What about privacy & security?

- » Office 365 has recently moved to data centres in Melbourne and Sydney
- » Many large organisations and governments (including Qld government) use Office 365
- » It's suitability depends on what information you intend to store and your funding agreements
- » Strong security controls  
<http://office.microsoft.com/en-us/business/office-365-trust-center-cloud-computing-security-FX103030390.aspx>
- » Strong privacy controls: ISO 27001, EU model clauses, HIPAA BAA & FISMA accredited  
<http://office.microsoft.com/en-us/business/office-365-trust-center-top-10-trust-tenets-cloud-security-and-privacy-FX104029824.aspx#complianceStandards>
- » You own and retain all rights to your data  
<http://office.microsoft.com/en-us/business/office-365-trust-center-top-10-trust-tenets-cloud-security-and-privacy-FX104029824.aspx#securityAndPrivacy>





# Office 365 resources– for more information

- » Office 365 for nonprofits: [www.microsoft.com/office365nonprofits](http://www.microsoft.com/office365nonprofits)
- » E1 vs. E3 plan: <http://office.microsoft.com/en-au/business/compare-office-365-for-business-plans-FX102918419.aspx>  
(Click on the 'Enterprise' tab)
- » Microsoft Office online training: <https://support.office.com/en-us/article/Office-365-for-business-training-e990f8ff-56d7-450e-ad9f-74ae8718ef09>
- » Australian Privacy Principles  
<http://www.oaic.gov.au/privacy/privacy-resources/privacy-guides/app-quick-reference-tool>
- » New Zealand privacy guidance on cloud computing  
<http://privacy.org.nz/assets/Files/Brochures-and-pamphlets-and-pubs/OPC-Cloud-Computing-guidance-February-2013.pdf> & Microsoft's answers:  
[http://blogs.msdn.com/cfs-filessystemfile.ashx/\\_key/communityserver-components-postattachments/00-10-41-34-76/Standard-Response-to-OPC-Cloud-Computing-Checklist-for-Office-365- 2D00 -24-April-2013.pdf](http://blogs.msdn.com/cfs-filessystemfile.ashx/_key/communityserver-components-postattachments/00-10-41-34-76/Standard-Response-to-OPC-Cloud-Computing-Checklist-for-Office-365- 2D00 -24-April-2013.pdf)
- » The Microsoft Trust Centre – Privacy, Security & actual availability information  
<http://office.microsoft.com/en-us/business/office-365-trust-center-cloud-computing-security-FX103030390.aspx>
- »  **ImproveIT** - [ImproveIT.org](http://ImproveIT.org)  
Resources to help your organisation get the most from your technology investment



# Prepare your Office

## Desktops and Laptops Operating Systems

- » Windows 7
- » Windows 8.1
- » Or Windows 10 (recommended)
- » Mac OS X 10.6

## Browsers

- » Internet Explorer 11 or greater
- » Latest versions of Firefox or Chrome
- » Safari 5 or greater

## Office Versions

- » Office 2013
- » Office 2016 for Mac
- » Office 2016 (recommended)



# The different versions of Office.....

## Desktop software



## Cloud based (can also be used on desktop)



# Minimum hardware specifications

Area	Minimum suggested	Recommended
Processor (CPU)	Dual Core 32bit (intel i5)	Quad Core 64bit ( <a href="#">intel i5 7xx</a> or above)
Memory (RAM)	4Gb	8Gb
Storage (HDD)	160Gb	160Gb
Display (screen)	1366 x 768	1680 x 1020
Browser	IE 10, Chrome	IE 11, Chrome
Network	LAN	
Internet	ADSL 2, Cable or Fibre	
Indicative costs (not including installation)	Desktop: \$400-\$800 Laptop: \$500-\$1000	Desktop: \$750-\$1000 Laptop: \$750-\$2000

