Morefield Communications

Office 365 Readiness and Preparation Outline

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Contents

Office 365 Feasibility Report

1. Information Gathering
    a. Number of email users: Click here to enter text.
    b. Current email system: Choose an item.
        i. If Exchange, what type of hardware: Click here to enter text.
        ii. If Exchange, what type of backups: Click here to enter text.
        iii. If Hosted, POP or IMAP or etc.: Click here to enter text.
        iv. Spam filtering solutions being utilized: Click here to enter text.
    c. How many locations: Click here to enter text.
    d. Internet Service Provider: Click here to enter text.
        i. Speedtest.net U/D report (run 3 and average): Click here to enter text.
        ii. If multiple location, how are they connected: Click here to enter text.
        iii. Are there other services utilizing bandwidth: Click here to enter text.
    e. Client connection overview.
        i. Percentage of staff using Outlook on PC's: Choose an item.
        ii. Percentage of staff using Web for email: Choose an item.
        iii. Percentage of staff using Mobile Devices: Choose an item.
    f. Client workstation overview.
        i. Percentage of staff using Windows XP or older: Choose an item.
        ii. Percentage of staff using Windows 7: Choose an item.
        iii. Percentage of staff using Outlook 2007 and newer: Choose an item.
        iv. Percentage of staff using Outlook 2003: Choose an item.
    g. Outlook usage analysis.
        i. How heavily are shared mailboxes/calendars used: Choose an item.
        ii. How heavily are Public Folders used: Choose an item.
    h. Phone System Integration / Scanners.
        i. Does client have a phone system that integrates with email? Click here to enter text.
        ii. Does client have MFP devices that scan to email? Click here to enter text.
2. Definition of client expectations
    a. What pain points have been experienced with current email provider? Click here to enter text.
    b. What is looked to be gained by a move to 365? Click here to enter text.
    c. Is Single-Sign-On a must? Click here to enter text.
    d. Is HIPAA a concern? Click here to enter text.
    e. Is larger than 25Gig mailboxes a must? Click here to enter text.
    f. Is SPAM a current issue? Click here to enter text.
    g. Are attachment size restrictions a concern? Click here to enter text.
    h. Are Blackberry devices being utilized? Click here to enter text.
3. Explanation of limitations
    a. Explain Single-Sign-On limitations. (AD Federation server, proxy server)

b. Explain Public Folders and the lack of them in 365.

c. Explain shared calendars etc.

d. Explain attachment limits, and mailbox size limits. (20meg attachment limit)

e. Explain Autocomplete, and the lack of migration to 365.

f. If Scan to Email is used, they will need a mailbox for this.

g. Explain short-term migration pain, and set expectations of client. (1-2 weeks for sync, 1-5days manually changing PC settings)

h. If Exchange is being used, is there a trusted certificate installed? If not, there will need to be one purchased in order to do Simple Exchange Migration. Otherwise, more manual steps for migration will be required, increasing the hours of the job.

i. If Exchange is being used, notify client that they will want to review current mailboxes to clean up unnecessary ones, and to modify some into distribution groups to save monthly costs. Open Exchange Management Shell and run "Get-Mailbox".

4. Risk-Benefit analysis

a. Is client in need of a different email solution immediately? Click here to enter text.

b. Can current setup last long-term? Click here to enter text.

c. What technical issues are seen with current situation? Click here to enter text.

d. Is client willing to suffer short-term migration pain for 365? Click here to enter text.

e. Why are they interested in moving? What is the catalyst? Click here to enter text.

Office 365 Preparation

1. Information Gathering

a. Obtain Domain Name Registrar credentials: Click here to enter text.

b. Obtain Office 365 admin account credentials: Click here to enter text.

c. If client has separate spam filtering solution, obtain credentials: Click here to enter text.

d. If client has separate backup solution, obtain credentials: Click here to enter text.

e. If client has on-prem Exchange, obtain admin credentials: Click here to enter text.

f. Obtain usernames/passwords for all staff members, both domain and email: Click here to enter text.

2. Network In-Depth Report

a. Determine if networking statistics can be gathered (ex: PRTG, Gateway traffic reports)

i. If so, gather data to determine how saturated the network is.

b. Ping outlook.com to get the IP address of data center local to site: Click here to enter text.

c. Use iplocation.net to get location of above server: Click here to enter text.

d. Run speedtest.net to nearest location to that location from above: Click here to enter text.

e. Use "Exchange Online Bandwidth Calculator" via LINK

i. Determine needs for In/Out bound traffic for client: Click here to enter text.

f. Check DNS settings both on the Internet and locally.

          i.   Use http://network-tools.com/ to run a DNS report on client's public domain name. Record the findings for MX and Autodiscover: Click here to enter text.

          ii.   Check local DNS for any external domain FLZ. Record the findings. Click here to enter text.

          iii.   Check local DNS local domain FLZ for Autodiscover. Record findings: Click here to enter text.

3. Hosted Preparation
    a. Obtain admin credentials for Hosted service: Click here to enter text.
    b. Contact provider and discuss migration options, whether we can do a simple exchange migration from their service, or if we can obtain a copy of all users' mailboxes, etc.
4. Exchange Preparation
    a. Create Domain/Exchange/Enterprise administrator account for testing and migration.
        i. Username: 365Migrator Password: Click here to enter text.
        ii. Give Domain/Enterprise/Exchange admin privileges.
        iii. Give Full Access Control to each mailbox in Exchange.
    b. Exchange RPC over HTTPS / Outlook Anywhere report.
        i. Check "Outlook Anywhere Enabled" for True in Server Configuration > Client Access. Record external host name: Click here to enter text.
        ii. Check IIS > Bindings > SSL for external host name above, Check certificate for externally certified cert.
        iii. Check Server Manager > Features, RPC over HTTP Proxy must be enabled.
    c. Run testexchangeconnectivity.com analyzer from a remote computer.
        i. Test Outlook Anywhere, and put in necessary credentials and host names to test. Record any issues: Click here to enter text.

Office 365 Migration

1. Pre-Migration Checklist
    a. Network has been determined to handle Office 365 Traffic. ☐
    b. Client has reviewed current mailboxes and determined how to cleanup old ones, and which to archive for historical purposes, and which distribution groups to create? ☐
    c. Client has been notified of all limitations and expectations? ☐
    d. Testexchangeconnectivity works 100% and certificate is good? ☐
    e. A date that is a good 2-3 weeks out has been set for "tentative cutover date?" ☐
    f. We have control over Domain Name Registrar? ☐
    g. Staff has been notified of dates for migration/cutover? ☐
    h. Staff has been notified to clean up mailboxes? ☐
2. Simple Exchange Migration
    a. Create a migration batch in 365 to begin syncing mailboxes to client account. Exchange Management > Email Migration > New. Enter in credentials and host name information.
    b. Record any Errors or Issues: Click here to enter text.

      c. Allow a week per 50 users syncing 3 mailboxes at a time.

      d. Once users mailboxes are migrated into Office 365 we must perform the following:

          i. Assign licenses to those users.

          ii. Use powershell to set passwords. [LINK](#)

          iii. Use powershell to set password expiration to never. [LINK](#)

          iv. Use powershell to set time zones. [LINK](#)

3. Hosted / PST Migration

      a. Obtain PST archives for each user, and keep for re-importing into their Office 365 accounts.

Office 365 Cutover

1. Cutover Checklist

      a. A project plan has been created to make changes on site, who will be doing what, when, how mobile devices will be handled, and how remote workers will be handled? ☐

      b. Lists of Staff usernames and passwords for domain logins and email accounts? ☐

      c. External DNS changes have been made via Office 365 recommendations? ☐

2. Exchange Server Cut-over

      a. If Exchange 2003, you will need to do registry hacks to each PC to bypass SCP lookups.

          i. HKCU\Software\Microsoft\Office\<12.0 or 14.0>\Outlook\AutoDiscover

               1. ExcludeScpLookup

               2. ExcludeHttpsRootDomain

               3. ExcludeHttpsAutoDiscoverDomain

               4. ExcludeHttpRedirect

               5. ExcludeSrvRecord

          ii. Configure the DWORD values all to 0 except "ExcludeScpLookup" which should be set to a value of 1.

          iii. You will also need to configure internal DNS

               1. Alias: autodiscover.yourdomain.com -> autodiscover.outlook.com

               2. Alias: autodiscover -> autodiscover.outlook.com

      b. If Exchange 2007, you will need to use powershell to change SCP record on Domain.

          i. You will need to configure internal DNS

               1. Alias: autodiscover.yourdomain.com -> autodiscover.outlook.com

               2. Alias: autodiscover -> autodiscover.outlook.com

          ii. On local domain controller run following cmdlets:

               1. Get-ClientAccessServer

                    a. Will publish your *Server*

               2. Set-ClientAccessServer – Identity *Server* - AutoDiscoverServiceInternalUri https://autodiscover.outlook.com

3. Workstation Cut-over

      a. Log into desktop as user with user account.

      b. Log into office365.com as user's email account.

c. Download desktop set-up program. Follow all prompts.

d. Open Outlook, and record any additional archives/pst.

e. Create new Outlook profile. Control Panel > Mail > Show Profiles > Add. Setup with new Office 365 credentials. (old exchange credentials may auto-populate, just delete a character and key in correct credentials)

f. Repoint any PST or archives that were set on Outlook prior, and repoint Signature to existing.

g. Explain to user that syncing old mail may take a day or two. Please leave Outlook open and computer running when they leave the office that day.

4. Hosted Migration

a. Log into desktop as user with user account.

b. Log into office365.com as user's email account.

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e. Create new Outlook profile. Control Panel > Mail > Show Profiles > Add. Setup with new Office 365 credentials.

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Office 365 Finalization

1. Uninstall old Exchange server.

2. Assist with re-sharing calendars/etc.