

# Office 365

Migrating and Managing Your  
Business in the Cloud



**Matthew Katzer**  
**Don Crawford**



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## Office 365: Migrating and Managing Your Business in the Cloud

Matthew Katzer and Don Crawford

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*We dedicate the book to our wives, who have stood by us as we learn how to be one with the cloud.  
Without their support, we could never achieve what we dream to accomplish.*

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# About the Authors



**Matthew Katzer** created KAMIND in 1998 to supply solutions using Microsoft and Intel Technologies for small- and medium-size businesses. Prior to creating KAMIND, he worked for Intel Corporation for 17 years, managing engineering development and IT projects. After leaving Intel, he pursued the development of technology-related inventions and holds 19 domestic and international patents in related areas. Katzer's focus with cloud solutions started in 2009, looking at ways that businesses could improve productivity and reduce operating costs. He holds a B.S.E.E. from the University of Michigan and an Executive M.B.A. from the University of Oregon.



**Don Crawford** brings more than 40 years of experience in database systems, online systems, networks and security, business and project management, and strategic planning. He has worked for large and small companies and organizations, including local government in Oregon, Software AG, First Interstate Bancorp (now Wells Fargo), Tektronix, CACI, Oregon Health & Science University, and LocalDial. He built a consulting business supporting industries such as hospitals and medical organizations, technology companies, service companies, startups, and nonprofits. Crawford is a partner in KAMIND.



# About the Technical Reviewers

We 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.





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Each of the chapters includes additional information on various blogs and Internet postings, to assist readers in searching out information on Office 365 and Microsoft's other cloud services. If we have missed a credit or an acknowledgment, please let us know.

—Matt Katzer & Don Crawford



# Introduction

Why Office 365 and why this book? We are cloud solution consultants. Our mission is to make companies more successful through our knowledge of Office 365. We help companies assess, migrate, and manage cloud-based solutions.

Office 365 is a cloud-based service; 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 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. It agreed.

KAMIND, a Microsoft Tier 1 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 is focused 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 tradeoffs toward moving to the cloud.

## Chapter 2—Using Office 365 and Windows Intune

The best way to understand Office 365 is to experience it. We explore the Office 365 capabilities in a demonstration site, with a focus on how this helps your business productivity. We use a day in the life of a user to demonstrate the capabilities of Office 365. The chapter closes with a reference section on the most common end-user configurations.

## Chapter 3—Office 365 Planning and Purchase

The secret to a successful migration to Office 365 is picking the correct plan that supports your business. There are three different categories of plans. 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 details the choices. It concludes with information about pre-deployment, deployment, and post-deployment.

## Chapter 4—Office 365 Setup and Migration

After you have selected your Office 365 plan and completed the planning process, the next step is the migration process. There are different ways you can migrate to Office 365 and different migration techniques. This chapter covers the most common approaches to Office 365 migration.

## Chapter 5—SharePoint Administration

SharePoint administration and design can be simple or complex, depending on your business needs. This chapter provides a basic overview of the configuration necessary to be up and running using the SharePoint team site of Office 365. This chapter describes site design and construction issues and offers an overview of the SharePoint administration functions.

## Chapter 6—Building Your Web Site

Office 365 includes a public-facing web site and the necessary developer's tools to build out the site. This chapter takes you from the basic Office 365 site to a fully functioning web site. The Office 365 public-facing web site fulfills the Web needs of 90% of the businesses on Office 365. This chapter describes how to configure and build the public-facing web site for your business, using the integrated Office 365 web site tools and SharePoint Designer, a design tool that is included with your Office 365 subscription.

## Chapter 7—Windows Intune Administration

The secret to an optimal Office 365 site is the management of the desktop to ensure that updates are current and that the user antivirus is functioning. Windows Intune is a desktop management tool that addresses these issues, reduces the administrator's effort in desktop management, and improves the user's experience.

## Chapter 8—Office 365 Administration

This chapter describes the different administration centers in Office 365 and the most common tools that you would 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 Lync administration centers. The SharePoint and Windows Intune administration centers are described in their own chapters. The chapter closes with how to use PowerShell to manage your Office 365 environment.

## Chapter 9—Compliance and Data Loss Prevention

Businesses must now adapt their e-mail document-storage systems to correctly process their electronic communication in consideration of regulatory requirements. The compliance and data loss prevention (DLP) features of Office 365 provide the capability to allow a business to manage its communications and protect against simple mistakes. Office 365 includes integrated discovery that supports legal discovery and audit requirements.

## Chapter 10—Exchange Online Protection Administration

Office 365 is composed of a set of services. The Exchange Online Protection (EOP) service is the front end of Office 365 that handles all the external e-mail front-end processing and filtering. If you have smart devices that e-mail to Office 365, you will use EOP to manage the interaction.

## Chapter 11—DirSync, AD FS, Single Sign-On, and Exchange Federation

Active Directory Federation Services and single sign-on is the integration of the Office 365 Active Directory with an on-premises Active Directory. This allows one sign-on (controlled by on-premises servers) to give access to both cloud and on-premises resources. Password Sync can be a simpler implementation that meets many requirements. Federation allows on-premises and cloud Exchange servers to work together.

Microsoft Office 365 releases updates every 90 days. The Authors have committed to updating this book on a similar timeline. The latest updates to this book may be found at [www.getoffice365now.com](http://www.getoffice365now.com).