Cloud migration 101: Office 365

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Superhighways

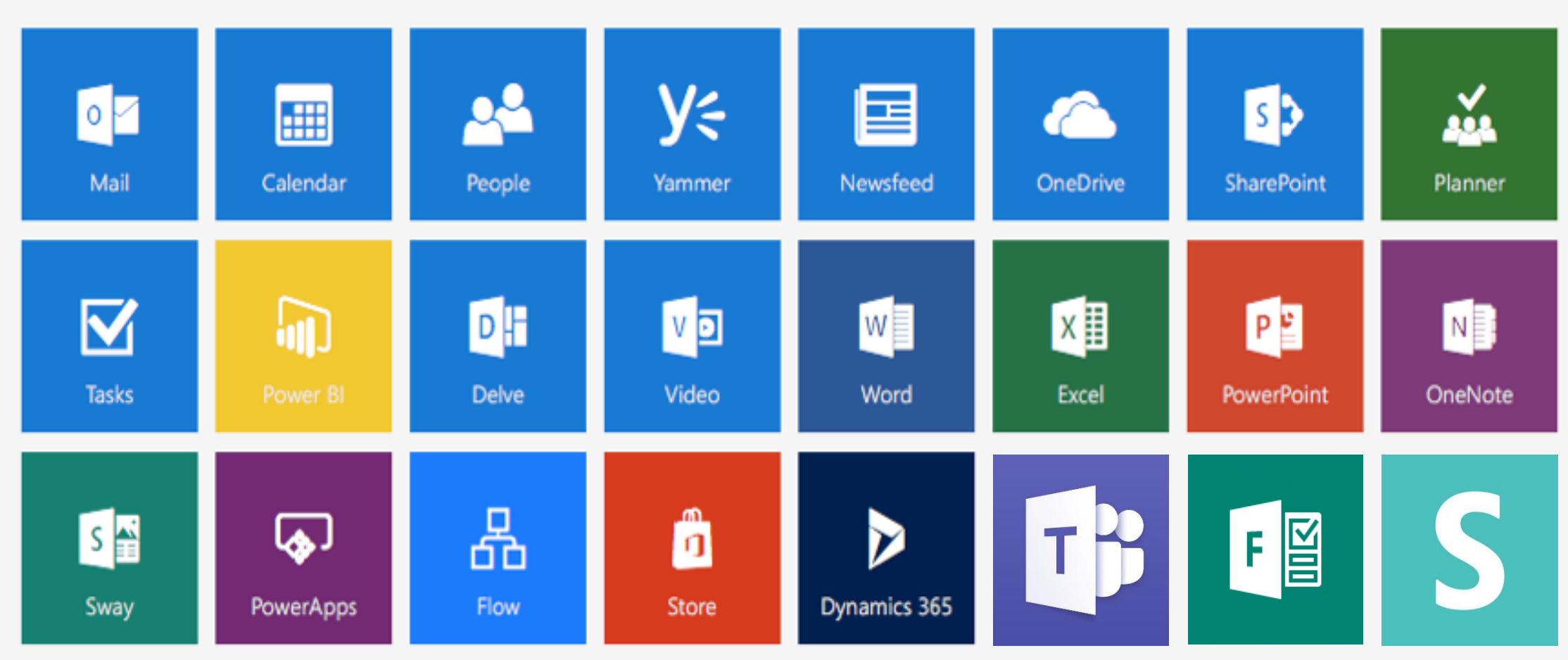
Who, why & what…

- We help small charities do more with digital
- Here's our practical advice on making the move to Office 365 as smoothly as possible

The road map…

- What's the driver?
- Getting people on board
- It's all in the prep
- Planned migration
- Risks & mitigations
- Train & embed within organisation
- Take full advantage of features

Categories
Expense by month


Mail
Calendar
People
Yammer
Newsfeed
OneDrive
SharePoint
Planner
Tasks
Power BI
Delve
Video
Word
Excel
PowerPoint
OneNote
Sway
PowerApps
Flow
Store
Dynamics 365

O365 - more than email & file storage!

- Sway – newsletters, presentations and reports
- Forms – online surveys, quizzes and polls
- Planner – organise work across teams
- Teams – a hub for all your team collaboration
- Power BI – business intelligence and visualisation
- EMS (Enterprise Mobility & Security) – control access to your data (50 free donated licences)

Office 365 Training Center

START WITH 6 SIMPLE STEPS >

Outlook OneDrive Word Excel PowerPoint OneNote SharePoint Microsoft Teams Yammer Access

Learn the basics

Get going quickly and easily with Office 365 video training.

START NOW >

Try it with templates

Learn what's possible with Word, Excel, and PowerPoint.

TRY IT >

Work better together

Share, co-author, communicate, and collaborate as a team.

SEE HOW >

Save time with tips

Work smarter and get more out of your Office apps.

GET TIPS >

See great ways to work

Get inspired with cool new infographics for Word, Outlook, and PowerPoint — custom signatures, language translation, voice dictation, collaboration, mobile options, and more.

LEARN NOW >

First things first…

- Document current set up
  - Which OS – Mac or Windows? Which versions? (current & most recent are compatible)
  - Which Office version?

- Is your broadband up to it?
  - Upload speed as well as download speed is important
  - Do you have contingency?

- Do you need a Server
  - Legacy software – Sage, Access (!) etc
  - Number of users, user management, roaming profiles, print management..

Which subscription?

- E1 vs E3

Donation	£4.00 user/month	£12.30 user/month
Office 365 Nonprofit E1	Office 365 Nonprofit E3	Office 365 Nonprofit E5

- Go for 'Larger non profits' rather than 'Small & midsized' options as offers Enterprise suite)
  - EMS / Legal hold requirements?
  - Office applications to download vs buy outright via Tech Trust?
  - Remember you can mix and match

Registration process

- Register with Tech Trust (if you are not already)
- Obtain your O365 validation token
- Register for the Microsoft Non-Profit programme using your token
- You will be notified by email of you eligibility results
- If eligible, login to the Non-Profit Portal, and go to Microsoft365 Admin Centre
- Add your domain, you'll need to verify that you are the owner of your domain (you'll need to log on to your domain control panel)
- Purchase your Office 365 Subscription

A phased plan of action

1. Upgrade Operating System and Office versions
2. Migrate your emails
3. Migrate your data

For each phase – plan in…

- Engagement / buy in
- Manage expectations and showcase benefits
- Training, training, training! An ongoing offer + induction for new staff

Outlook migration – 10 questions

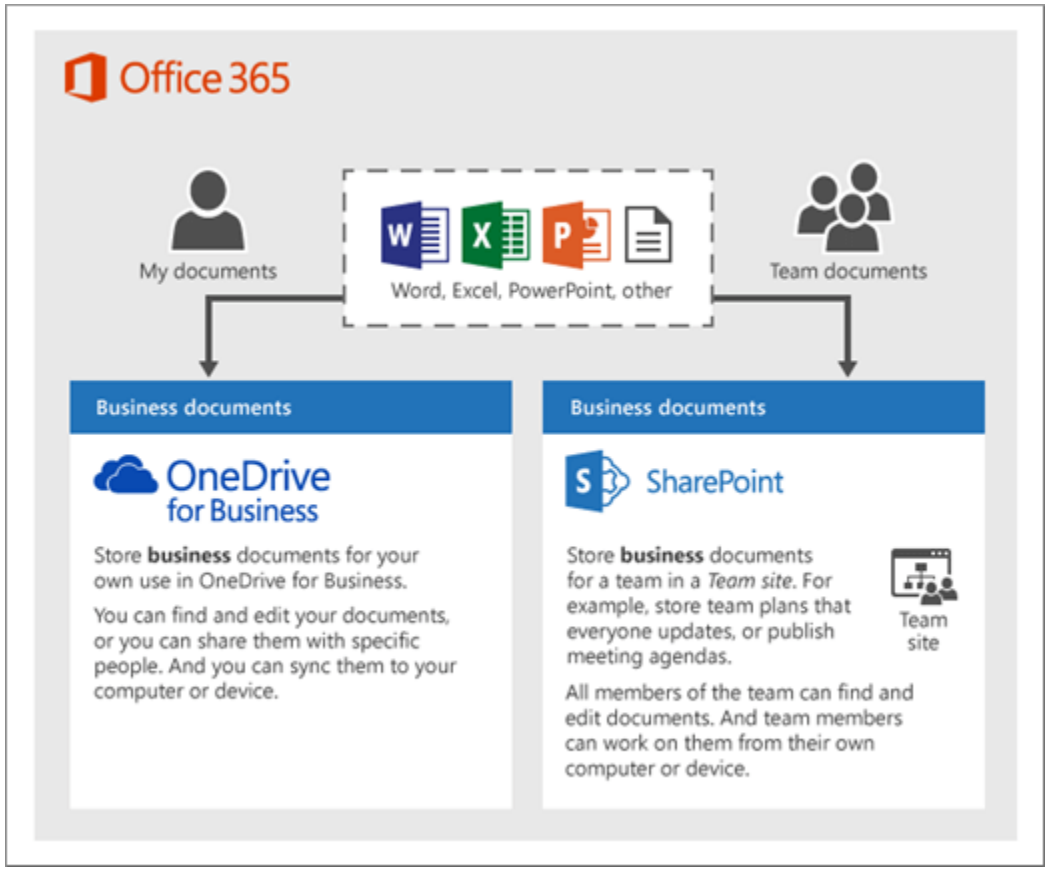
1. Existing provider: Webmail? On-premise Exchange? Hosted Exchange?
2. Rationalise email data if large amounts?
3. Distribution lists?
4. Forwarding / other rules?
5. Contacts? (Autocomplete won't transfer over)
6. Resource calendars?
7. Calendar permissions?
8. Delegate access / shared generic accounts e.g. info@ mailboxes?
9. Organisational signatures or Disclaimer?
10. Are you using Outlook's archive feature – local pst files?

Outlook migration – options

Current set up will inform options available…

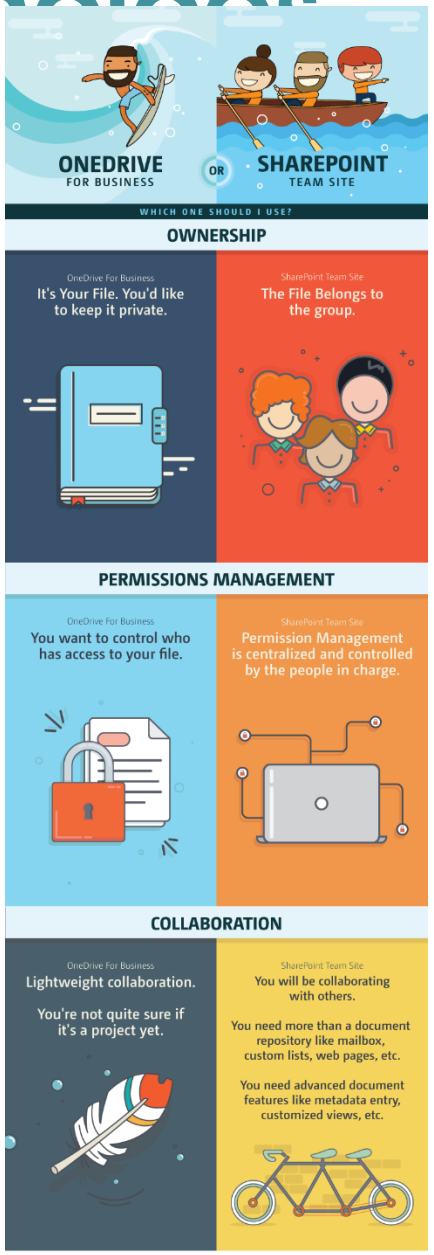
- IMAP or POP? Exchange migration vs pst file export
- Outlook in web browser? Connecting local Outlook? OWA app on mobile?

Data migration – 365 Data Choices
OneDrive vs SharePoint



Things to Consider:

- Ownership
- Permissions Management
- Collaboration
- Access
- Privacy
- Sharing



Data migration – 5 questions

1. Where is current data – Server? NAS drive? Hosted Desktop? Local PCs(!) Do you have access?
2. Does your current Folder structure work - take the opportunity to restructure, reorganise and rationalise your data. A flatter structure recommended.
3. Consider the restrictions

   5000 items, 400 characters, no " * : < > ? / \ |
4. Folder & file permissions
5. Local archiving may be needed if data size huge!

Data migration – options

- Set up folder structure in Office 365 (you could then replicate in current location?)
- Move data – either 'drag & drop' or use the Ms SharePoint Migration Tool or Third-party tool
- Map drives so access through Windows Explorer vs portal access only?

- User expectations
- Sharing files vs email attachments

Pitfalls

Case study 1

- Bad user experience – frustrations especially from part time staff
- Infrastructure limitations – we couldn't implement Azure Active Directory
- Staff not confident using workarounds
- Taking on user management without fully implementing

- Risk to have a standard Windows log on – people don't always sign out of their O365 accounts!

Lessons (& dealing with the reality)

Case study 2

- Hosted desktop – no access to do exchange migration, had to use IMAP
- Data – had to pay for it to be copied & couriered with associated delays and downtime too
- Created a new file structure but didn't have time to move the data into it (and haven't subsequently)

- Everything together due to funding timescales – new PCs, Win 10, Office 16, Office 365 migration and Salesforce!!

Successes – (O365 & Salesforce)

- Organisation and IT = culture shift
- Remote working = stable and consistent = travel time saver
- Reimagining our programmes = process invites questions, critique of long standing structure
- Team closer to targets, evaluations and seeing their results
- Reporting - 1st completed report without asking team to complete additional Word template!

Successes (O365 & scaling up)

Case study 3

- Standard peer to peer network with local NAS – email first then data
- Huge benefits of remote access to email, shared calendars & data
- A year later they scaled up to 2 extra boroughs and another office – cloud system allowed them to communicate and collaborate effectively
- Domain name change – much easier to co-ordinate (create new and link, alias etc)

GDPR & Cybersecurity

- Multi factor authentication
- Enterprise Mobility & Security - device management, encrypted emails, data loss prevention
- Discovery – right to be forgotten
- Policies and guidelines – passwords, homeworking, byod, leavers

Enterprise Mobility+Security

Send Attach Protect Discard •••

Do Not Forward: Recipients can read this message, but they can't forwards, print, or copy content. Change Permissions | Remove

To

Cc

Bcc

Add a subject

Kate White
Superhighways Manager
Tel 020 8255 8040

www.superhighways.org.uk
@SuperhighwaysUK

Change Permissions

Choose how recipients can interact with this message

Confidential - All Employees

- Encrypt
- Do Not Forward
- Confidential - All Employees
- Highly Confidential - All Employees
- Protect

Sway

Details | Emphasize | Accent | Link | Focus Points

Kingston Data Hack

1 - Exploring small charity data in the Roya...

Background

Heading 1 Card

Exploring small charity data in the Royal Borough of Kingston upon Thames

Text Card

The word data has the power to terrify and excite. For some it's simply the boring stuff that only the geeky understand. For others it uncovers hidden patterns, correlations and insights that can change the world.

Data is something that every small charity and community group has, such as information about the numbers of people attending activities or personal information from clients.

Image Card: Kingston Data Hack smiling.jpg

Caption

Forms

Questions | Responses 42

Top tools...

A test to show Forms

1. Are you already using online forms to collect data? *

- Yes
- No

Forms

Questions | Responses 47

Top tools...

47	00:59	Active
Responses	Average time to complete	Status

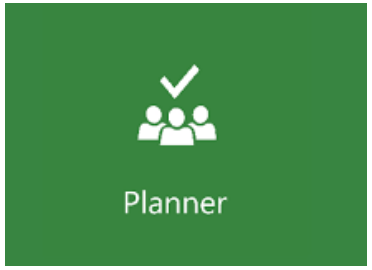
View results

Open in Excel

1. Are you already using online forms to collect data?

More Details

Yes	20
No	27



KD

Planner ☆

··· > General

Board Charts Schedule ···

KW AR SP PT +1 Members

To do	In progress	Done	Add new bucket
+	+	+	
	Evaluation 15/06 ··· KW Kate White	Book venue ··· Contact all speakers ··· Finalise agenda ··· Order lunch ···	

Hide completed 2

~~Create Sway round up~~

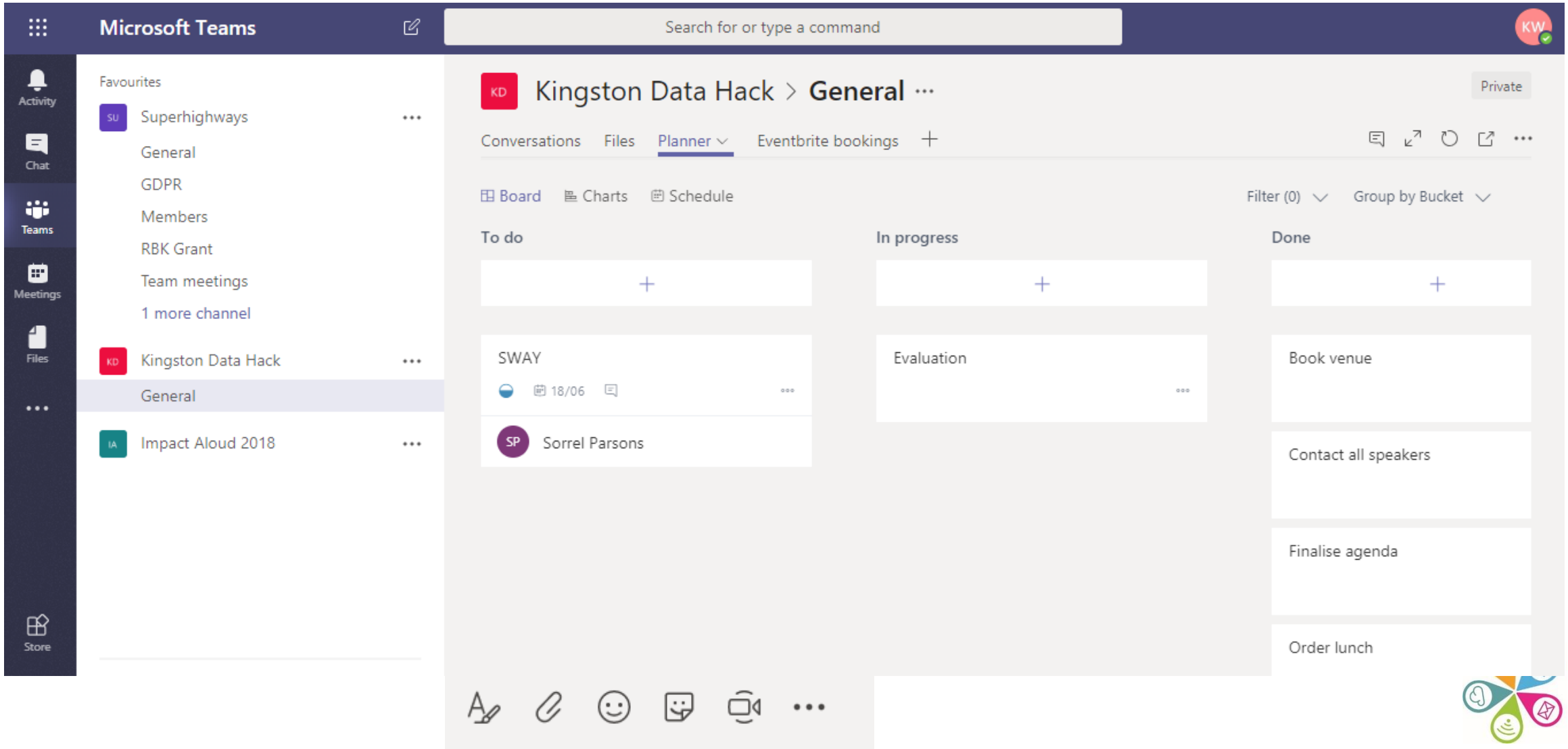
22/06 ···

SP Completed by Sorrel Parsons on 21/06

~~SWAY~~

Aim - 1) to share back with attendees - embedding resources & adding links out to Step by step guides etc Focus on 1st section and then just slides from other speakers
2) To share with those who didn't attend -

Microsoft Teams



Power BI

Campaign revenue vs target
$62.3K
Number of visits
200
Response status
Confidence in Prediction
87 %
Variance to Budget
Average Store Visits by Department
Expected Revenue
$320M
Unique Visitors, Daily Users
Tweets by country and sentiment
Cost vs Revenue
Sentiment by product category
Store performance
Order, inventory, lost sales units

Thank you for listening!

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