8 Key Points to Consider Before Moving to Office 365

If a move to Microsoft's Office 365 bundle of applications is something you're considering, here are 8 key points to factor into your plans:

1. Work with a Microsoft Partner

Migrating your email and/or documents to Microsoft's cloud is a task best performed by an IT company with the proper training, and experience doing so. The task is time consuming and there are ways to make things go smoothly that you only learn through experience. Also, there is technical information you will need to gather and to understand, so if you're not technical, don't try this yourself. Work with a Microsoft Partner with the **Microsoft Small and Midmarket Cloud Solutions Competency**.

2. SmartPhone Synchronization to Exchange Email

All SmartPhones that support ActiveSync can be set up for live synchronization of email, calendars and tasks. Some older Blackberry phones do not support ActiveSync, so you should review all of your user Blackberry devices to ensure they support ActiveSync.

3. Ensure Compatibility

Before making the plunge, make sure your systems will be compatible with Office 365. For instance:

a) Microsoft Office (including Outlook) installed on local PC's should be version 2016 or newer for full functionality of Office 365. Older versions of Office may still connect with reduced functionality, however as of October 13, 2020, they will not.
b) Computers using Office 365 must have an operating system that is Windows 7 Service Pack 1, Windows 8.1, Windows 10, or the 2 most recent versions of Mac OS.
c) Your browser must be the current version of Internet Explorer, Microsoft Edge, Chrome, Firefox, Safari or Opera.

If upgrades are required, factor this into your budget and get your systems compatible before starting your migration project.

4. Ensure Network readiness

If migrating from an in-house Exchange Server to Microsoft Hosted Exchange, it is important that your local Exchange Server is in good health for the migration to proceed smoothly. Ensure that a qualified IT professional checks your Server and corrects any possible issues that could adversely affect your migration project.

Your Internet connectivity should be reliable and provide enough bandwidth to accommodate the number of people who will be using Office 365. Consider a backup Internet connection should your primary connection go down.

5. Know where your DNS is hosted (assuming you already have a domain)

Knowing where your DNS (Domain Name System) is hosted and the credentials to the portal where you can make changes to your DNS settings, is critical. These settings affect where your Email (and web site traffic) gets routed. Moving to Microsoft Exchange Online will require a change to your DNS settings to re-route your email traffic.

6. Understand Plan Options and Subscription Licensing

When planning to implement Office 365, you will want to determine which Office 365 Plan best suites your needs. Details of the various plans can be found at the links below (Canadian funds). You may also find it helpful to consult with your Microsoft Partner before choosing your plan to be sure you understand exactly what you **are**, and **are not** getting.

https://products.office.com/en-ca/business/compare-office-365-for-business-plans

https://products.office.com/en-ca/business/compare-more-office-365-for-business-plans

Once you have chosen your Office 365 Plan, it is important to understand how the subscription licensing works so you'll know exactly what your monthly (or annual) subscription fees will be. It's also important to note that it's generally best to purchase your Office 365 subscriptions from a Microsoft Partner offering

Office 365 services. In some cases, they may offer better pricing than what Microsoft advertises on-line.

Most customers of Office 365 plans will want at least the Exchange Online service. When determining the number of "users" you need to license, this would be every user who needs their own email address. For email addresses such as "Info@" or "sales@", a license is **not required**, as these can be configured as Shared Mailboxes. That is unless those mailboxes need to be accessed directly with their own unique password. Otherwise, they would need to be accessed as secondary mailboxes once a licensed user logs onto Exchange Online.

7. SharePoint Document Management

If you plan to use SharePoint for your document management, sharing and collaboration and aren't already adept at designing and setting up a SharePoint portal, you will want experienced help. A Microsoft Office 365 Partner can work with you to plan and design a template adapted to your business, and then provide training on how to easily add or update information and documents in the portal moving forward. They can also help you discover new ways to use SharePoint to provide even more value to your organization.

8. Support

While Microsoft does offer support to subscribers of Office 365, unless you have knowledgeable IT staff, you will want to have a Microsoft Partner to call for help in areas such as:

- connectivity issues via Outlook, browsers and handheld devices
- troubleshooting SPAM issues
- troubleshooting delivery/receiving issues
- managing white list, black list, aliases, distribution lists
- adding, editing or removing user accounts

Give us a call or email and get started with your move to Office 365.