

TOP CONSIDERATIONS BEFORE MIGRATING TO MS OFFICE 365

Office 365 from Microsoft is a software platform built on a highly redundant and secure infrastructure. It is offered with a monthly or annual fee and includes SharePoint for intranets, Exchange for email and Office Professional for Word/Outlook/Excel, among other productivity tools.

With the common life cycle for server replacements at around three to five years, firms are frequently required to purchase and upgrade equipment. With a migration of a few key systems, Office 365 has the potential to remove some of the heavier upgrade requirements. A firm can get out of the business of managing many internal systems and outsource this component. With a lower per user cost, the firm can significantly increase reliability and security by moving to Office 365. When evaluating options for the next upgrade cycle, a decision to stay on-premise or migrate to the Office 365 requires some careful planning. There are numerous factors relating to existing infrastructure and software that influence the direction of this type of migration.

When a firm evaluates Office 365, the first system that is frequently moved to its platform is messaging. The biggest reason for this is existing Outlook clients may already support Office 365. When migrating the back-end mailboxes, this is relatively seamless to end users. After the messaging is migrated, the firm can take advantage of other software packages Office 365 offers. That custom on-premise instant messaging solution can be replaced with Office 365 Teams. Have an older Office version? With the right subscription, Office Pro 2016 comes built in with Office 365.

The data centers run by Microsoft meet the highest industry standards for security and reliability. Upgrades and patches are performed by their network teams. An electrical outage for the firm's building does not stop email from flowing. If the firm is looking to augment or improve the disaster recovery capability, Office 365 has it covered. When considering the move to Office 365, the following items can make or break the migration.

Outlook is key

Many existing firms have a variety of software built into their desktops that rely on the email inbox. Microsoft Outlook is a common tool used to compose, review and send emails. When evaluating a migration to Office 365, note that not all existing versions of Outlook are supported in Office 365. In fact, keeping an older version of Outlook and trying to get it to function with Office 365 will cause enormous headaches during the migration process. If the firm deploys Office 2013/2016, the migration will be much smoother. For any of Outlook prior to Office 2013 it is advisable to upgrade the Office version ahead of the migration. With the E3 Office 365 subscription, users can install Office Pro 2016 on up to five devices as part of the subscription. Depending on the Office version, you may migrate the back-end mailboxes first, or it may be better to upgrade the Office suite first.

Plug-ins, plug-ins, plug-ins

Most firms that utilize Outlook have several ancillary applications that plug into the software. When upgrading to a newer version of Outlook or moving to Office 365, those plug-ins need to be evaluated for compatibility. Some software, while functioning well with a newer version of Outlook, may not work with Office 365. The software developer may have a new patch that has been released to support Office 365, but the firm does not have it deployed. Make a list of all the third-party plug-ins, including software that links to the phone system, macros, metadata cleaning tools, calendar sync items and document management software and begin evaluating for compatibility for newer versions of Outlook and hosted Office 365 mailboxes.

Exchange is your friend

While Outlook is the client-side piece of software that most users interact with, the back-end server software that hosts the mailbox on-premise is called Microsoft Exchange. Depending on the version of Exchange and the migration scenario, a two-step migration may be required. Any version of Exchange prior to 2007 involves additional steps and possible third-party tools to migrate to Office 365. Some deployments may require an upgrade to Exchange 2013/2016 and only then a migration to Office 365. Carefully evaluate the on-premise Exchange version for compatibility with Office 365.

Plan for storage

Frequently a firm will deploy a Remote Desktop or Citrix servers to deliver applications to users remotely. When on-premise Exchange was deployed, the Outlook mailboxes could operate in online mode and cached folders were not required. When using Office 365, Outlook must be in cached mode to function properly. Cached mode allows for a copy of the mailbox to be made locally which speeds up performance. For practical purposes this requires the remote server to have a larger drive size to support the copies of email stored locally. If the remote server does not have enough storage space to support the now local copies of mailboxes, Outlook will have performance issues.

Bigger bandwidth

Firms looking to migrate to a cloud solution tend to forget about one key piece that helps make the project a success: The amount of internet bandwidth is critical. Before an Office 365 migration, most of the email traffic from Outlook to the back-end server occurs within the office on fast ethernet or fiber connections. When migrating mailboxes using Office 365, the amount of bandwidth should be evaluated. During the migration process a slow internet connection will take a long time to move on-premise mailbox data to Office 365 and can affect migration timelines. Additionally, when setting up a new computer for a user, Outlook will download the user's mailbox to its cached folder more quickly with faster internet. A slow internet connection means this process will take a long time, especially for any user's mailbox over 10 gigabytes in size. An additional reason to upgrade the Outlook version is the most recent Outlook 2016 has optimized the experience of how the cached Outlook mailbox behaves, making the interface very similar to that on-premise.

Embrace two-factor authentication

With security in the forefront of everybody's mind, migrating to Office 365 offers a unique opportunity to introduce additional security-related features. While Gmail, Hotmail and other messaging systems have introduced two-factor authentication (2FA), getting the feature added to an on-premise mail system has been problematic. This is due to the technology and the reluctance to add this feature to an already working system. Why risk the change? Migrating to Office 365 is a perfect opportunity to introduce two-factor authentication because users

are expecting a change anyway. Adding 2FA at this moment will help with adoption and overcoming any hurdles to the security upgrade.

With the introduction of Office 365, Microsoft has given businesses of all sizes the ability to take advantage of world-class technology. Office 365 offers a bevy of solutions for solving complex technology needs. Carefully evaluating the existing technology a firm deploys makes a smooth migration to Office 365 possible. Key points to consider are existing software, plug-ins, storage and security requirements.

About the Author

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