Office 365 Deployment

Step by Step

July 2014

Office 365

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Use this guide to get up and running with Microsoft Office 365 in your organization. All it takes is three easy steps: get started, bring your organization on board, and configure optional settings based on your organization's needs.

1.
Getting started

Start using Office 365 without
disrupting your current environment.
In about an hour, you can:

> Set up your email and be productive
on your desktop, phone, or tablet.

> Create documents and collaborate
online with Office desktop
applications, Microsoft SharePoint
Online, and Office Online.

> Run online meetings and
communicate with others through
Microsoft Lync Online.

Before you begin

Learn about Office 365 at the Microsoft Virtual Academy

Before you get started with Office 365, we recommend you take some time to learn about how to manage and deploy Office 365 with these free online courses from the Microsoft Virtual Academy:

> Office 365 Fundamentals online course helps IT professionals understand the basics of Office 365.

> For more advanced learning, check out the Managing Office 365 Identities and Services course. These modules have the added benefit of helping you prepare for the Microsoft Certified Solutions Associate (MCSA) Office 365 certification.

Ensure your environment meets Office 365 requirements

Make sure you and your trial users have everything you need to get the most out of the Office 365 experience.

> **System requirements:** Everyone in your trial needs to meet basic desktop and mobile requirements.

> **Internet connectivity:** If you're using a firewall to limit access to the web, make sure to allow unauthenticated access through port 80 and port 443. As you move from trial to deployment your requirements may change, but this quick change is all you need for your trial.

Sign up for Office 365

Signing up for the trial is easy. It takes only a few minutes and you won't need a credit card. The trial is free for 30 days and allows you to share the trial with as many as 25 users. When signing up for a trial, remember a few important things:

> > Choose an organization name carefully. You'll continue to use this name beyond your trial and into your final deployment plans. It's also important to choose an organization name that your trial users will recognize and easily remember. For example, if Contoso is the name of your organization, here's how that name would be used in your service URLs:
> > **> Sign-in credentials and email addresses:** user@contoso.onmicrosoft.com
> >
> > **> Team site:** http://contoso.sharepoint.com
> >
> > **> Newsfeed:** http://contoso-my.sharepoint.com

> > After you're done signing up, you will be logged into your trial as the first admin. Remember to come back to Office 365 FastTrack to continue setting up your trial.

Now, you're ready to sign up for a free trial of Office 365.

Set up your initial domain

As part of signing up for Office 365, you received a default domain (your onmicrosoft.com domain) that you can use to quickly get started without having to make any changes to your existing DNS records. Here's how to configure your onmicrosoft.com domain:

1   In the Office 365 admin center, click **setup**.

2   In the quick start section click **start**.

3   On the **Choose a domain** page, select the onmicrosoft.com domain.

4   Click **Next** to continue.

Add users to the trial

You can add all the trial users now, or just get started by adding a few. Many organizations open the environment first to the help desk and IT staff who will support the other users, and then to key business users afterwards. If you're going to do this two-step process, consider creating all the trial accounts now, and then provide the sign-in information to the remaining users when you're ready for each group to join your Office 365 environment.

To add one user at a time, follow the instructions to create or edit users in Office 365. It's the quickest way to add a small group of people to your environment.

If you want to add a lot of people at once, follow steps to add multiple users with a CSV file or use Windows PowerShell cmdlets for Office 365.

Try Outlook Web Access

If your users want to see what the Outlook Web Access experience is like, they can use connected accounts to send and receive email messages from their existing mailboxes without having to migrate any email. The connected account feature downloads a copy of current inbox email for immediate use in their Office 365 mailbox. It also allows users to send and receive email from their existing email address without the hassle of disrupting mail routing.

If you have already configured POP3 or IMAP4 access to the mailboxes in your organization, the only preparation required is to validate that you can add a connected account to your administrator mailbox. If you haven't enabled these protocols for your organization, enable the protocols before you validate that connected accounts work.

Learn how to set up connected accounts.

Try a SharePoint collaboration site

When you sign up for Office 365, a couple of site collections are automatically created for you. For your trial, we recommend that you create a new private site collection to test team collaboration with your users. A new site collection gives you the freedom to experiment, and if you choose to delete it at the end of your trial, you will not run into any of the problems that might occur if you delete the original private site collection that is created for you when you signed up.

Learn how to create a site collection.

Prepare users for the trial

Microsoft provides an email template you can use to notify your users that they'll soon be part of an Office 365 trial. It includes a welcome message and an overview of Office 365. To use the template:

1　Download the Introducing Office 365 template.

2　Edit the template to include what you expect of your users during the trial.

Take Office 365 for a test flight

All of your services are ready to try at this stage, but it's worth taking the time to try some of the features yourself or with a small set of initial trial users before adding the rest of your users. A test flight gives you some administrative experience in Office 365, and it will help your users ramp up on the service. Here are some ideas for getting started:

1　Send email messages to each other.

2　Share docs on OneDrive for Business or on your first team site.

3　Set up an online meeting to discuss your rollout plan.

Discover more ideas.

Let users try Office 365

When you're ready to roll out Office 365 to the other users, <u>download the Office 365 pilot template</u>, copy the contents into an email message, and send the message to users so they have the information they'll need to get started:

> Office 365 portal: <u>https://portal.microsoftonline.com</u>

> Outlook Web App: <u>http://mail.office365.com</u>

> Directions for setting up mobile devices: **Settings** ⚙ > **Office 365 settings** > **Get started** > **Phone & tablet**

> <u>Office 365 tips and ideas</u>

> Contact information for support staff

Decide on production deployment

When you're ready to deploy Office 365 to the rest of your organization, continue with the next section.

2.
Bringing your organization on board

Before you begin

Deploying Office 365 in your organization starts with readying your network and checking for any issues. We'll provide the tools and resources you need to do this. Depending on the complexity of your deployment, your setup process could take a few days to complete, but we'll help you review requirements and provide the guidance you'll need along the way.

Convert your trial to a paid subscription

If you're using a trial tenant, now is the time to convert to a paid subscription. Follow the instructions to [complete the conversion process](#).

Set up your own domain

Add your own domain to Office 365 so that user email addresses will be on your organization's domain, not on the default onmicrosoft.com domain.

To add a domain
Adding your own domain is as easy as following the steps below:

1   In the Office 365 admin center, click **Domains**, and then click **Add a domain**. You can skip adding users for now.

2   Verify that you own the domain by creating a record at your DNS hosting provider or domain registrar.

3   Define how you'll use your domain (that is, state the purpose for the domain) by selecting the Office 365 services you're planning to use: Exchange Online, Lync Online, SharePoint Online, or a combination.

4   Update your DNS records at your hosting provider or domain registrar to point to these services in Office 365.

For more details, see Add your domain to Office 365.

To update your default domain
After you've verified your domain, there is one more task to complete. Change your default Office 365 domain from onmicrosoft.com to the custom domain you just added.

In the Office 365 admin center, click your organization's name in the upper-right corner, and then select **default domain**.

Transfer trial users to your domain

Now that your deployment is using your own domain, start by moving your trial users and existing trial email to the domain you just added.

To notify your existing trail users
Before you switch your trial users to your domain, ensure they know that they'll now be using Office 365 for email and collaboration. Also, let them know what they need to do so that Outlook, mobile phones, OneDrive for Business, and other Office applications continue to work for them.

> **Mobile phones:** Updating the mobile phone configuration is simple. After the user ID is changed to Office 365, the mobile phone should prompt the user for new sign-in information. After entering their new user ID and existing password, the user's mobile phone should reconnect to Office 365. If the mobile phone doesn't prompt the user for his or her credentials, follow instructions to set up and use Office 365 on a phone or tablet.
>
> **Outlook:** If your trial users use Outlook, it should prompt them for their new credentials. The user only needs to type the new user ID and existing Office 365 password to continue using the profile. If Outlook doesn't prompt the user, follow instructions to change email account settings.
>
> **Lync:** Trial users who created Lync meetings before the domain name change will need to reschedule the meetings so they function under the new name. If these meetings are not rescheduled, meeting participants may receive an error message when they try to join any Lync Online conferences that are scheduled by that user. If you're already using Lync Server 2013, Lync Server 2010, or Office Communications Server 2007 R2 as part of your existing on-premises environment, you may need to make additional changes to prevent any interruptions for your users. To learn how to configure an existing on-premises Lync Server deployment with Office 365, follow the instructions to change email account settings.

If you need help creating a notification, download the Introducing Office 365 template.

To move your trial users to your custom domain

Now that you have your custom domain set up in Office 365, it's time to move your trial users onto it. Users can then sign in and receive email by using an address on your custom domain instead of going to onmicrosoft.com.

To move trial users to your custom domain:

1   Follow instructions to change user IDs.

2   Click **Admin**, click **Exchange**, and then follow the instructions to add a new primary email address for the mailbox.

Activate your Yammer Enterprise network

Yammer Enterprise requires manual activation from the Office 365 Admin Center, and allows you to take control of your enterprise social network with administrative tools such as network configuration, user management, advanced integrations, directory synchronization, and more.

After you've added your company domain and moved Global Administrators to that domain, it's simple to activate.

1   In the Office 365 Admin Center, click **Dashboard**, and then click **Included Services**.

2   Click **Yes, activate Yammer Enterprise for my network**.

3   Confirm the domain you will activate.
    The company domain you previously added is displayed. If you have multiple domains, select the one you want to activate for your Yammer network. If you already have a Yammer Basic network that you want to upgrade, select the as sociated domain. Note that your onmicrosoft.com domain cannot be activated for use with Yammer Enterprise.

4   Click **Activate Yammer Enterprise**.
    You are prompted to wait while the network activates.

5 Log into Yammer.

As an Office 365 Global Admin, you have access to the Yammer Admin Center to configure and manage your Yammer network.

Upon activation, all Global Admins on this domain are granted Yammer Verified Admin rights, and Yammer licenses are automatically given to every Office 365 user on your account.

Add users to Yammer
If users don't already have an account with Yammer, they will need to create one by using their company email address from the same domain. Admins also can add users directly through Yammer user management tools.

Make Yammer your default social experience
Now that you've activated your Yammer Enterprise network, be sure to let your organization know. Enable simplified login to Yammer from Office 365 so that users can easily access the network.

For more information about activating Yammer Enterprise, including eligibility, multiple domains, and other frequently asked questions, read the Yammer Activation Guide. To help you get the most out of Yammer, check out additional resources in the Customer Success Center.

Synchronize Windows Active Directory users

If your organization uses an on-premises Windows Active Directory, you can quickly integrate it with your organization's Office 365 tenant to automate cloud-based administrative tasks and to provide your users with a more streamlined sign-in experience.

Synchronize directories

Directory synchronization syncs on-premises directory objects (users, groups, contacts) to the cloud to help reduce administrative overhead. Directory synchronization is also known as *Directory Sync*.

For general information about Windows Azure Active Directory sync, see Configure directory synchronization.

Synchronize passwords

You can enable users to log into Windows Azure Active Directory and other services by using the same username and password they use to log onto your corporate network and resources. Password Sync is a feature of the Directory Sync tool. For instructions on deploying Password Sync, see Implement Password Synchronization.

If Windows Active Directory remediation is needed for synchronizing to Office 365, you can use IdFix to reduce the time involved to troubleshoot Windows Active Directory errors reported by the Directory Sync tool. Download the IdFix DirSync Error Remediation Tool.

Assign Office 365 licenses to users

Option 1: Assign licenses through the Admin account

1 Sign in to Office 365 portal by using an administrative account.

2 In the Office 365 admin center, complete the following steps:

> In the ribbon at the left side of the window, click **users and groups**.

> Select the users you want to update. You can select more than one user.

> At the right side of the window, above the Quick Steps, click the **Edit** button.

> Assign the license for Office Professional Plus.

Option 2: Assign licenses through a Windows PowerShell script

1 Install the Windows Azure Active Directory Module by following these instructions: Manage Windows Azure AD using Windows PowerShell.

2 Run the following PowerShell command:

```
Get-MsolAccountSku | Format-Table AccountSkuId,
SkuPartNumber
```

3 Create a .csv file named **master-users.csv** and add information as follows:

> Enter two column headings with names such as **Userprincipalname**, **UserLicenseSku**; be sure to separate the headings with a comma.
> **Note:** The column headers cannot contain spaces.

> Enter information for each user on a separate line as shown in the following example: **john@contoso.onmicrosoft.com, contoso: ENTERPRISEPACK**

> Save the file.

> Enter **Connect-MSOLService**, and then provide the administrative account credentials.

> Run the sample script with the saved .csv file as input
> **\Set-licenses.ps1 –inputfile set-licenses.csv**
> Licensing can be assigned during creation or after the script has been run.

Note: Please refer to the Appendix for a sample script.

Install Office 365 ProPlus

Users can install Office 365 ProPlus directly from the Office 365 portal. This is a hands-off approach where users control whether and when they use the installed applications or continue to use Office Online. To install desktop applications, users must have local machine administrator rights, and they should be familiar with installing software. Office 365 ProPlus Click-to-Run installations can be used even in environments that manage software installations.

As an administrator, you can install Office 365 ProPlus through most traditional software distribution methods. To download, configure, and manage the Office 365 ProPlus installation, follow steps to use the Office Deployment Tool for Click to Run.

For more information about these choices, see Content Roadmap for deploying Office 365 ProPlus.
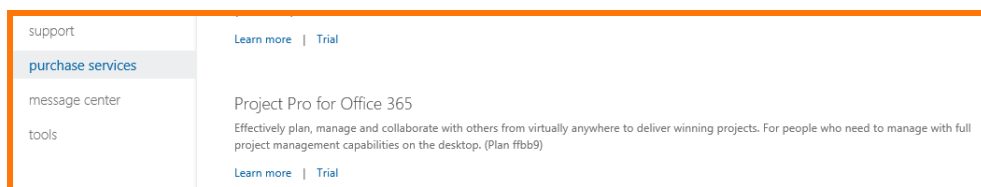
> **Important:** If you plan to deploy Office 365 ProPlus in a virtualized environment (for example, Remote Desktop Services), you need to complete additional steps. For more information, see Managing Office in Virtualized Environments.

After users install Office 365 ProPlus, they can start using it immediately. Office 365 is activated automatically. For more information, see Overview of licensing and activation in Office 365 ProPlus.

Optional: Enable additional Office 365 features and services

Project Pro for Office 365

1   In the Office 365 admin center, click **purchase services**, select Project Pro for Office 365, and complete the purchase.

support	Learn more	Trial
purchase services	
message center	Project Pro for Office 365
tools	Effectively plan, manage and collaborate with others from virtually anywhere to deliver winning projects. For people who need to manage with full project management capabilities on the desktop. (Plan ffbb9)
	Learn more	Trial

2   In the Office 365 admin center, assign the new subscription licenses to users.

For more information, see Microsoft Project Online with Project Pro for Office 365.

Build SharePoint site collections and groups

Before you roll out Office 365 to the rest of your organization, build the site collections that your organization will need to support internal projects and collaboration. Also, set up the SharePoint groups you will use to manage permissions across site collections. You can assign users to existing SharePoint groups or you can create custom groups.

Before you build site collections, work with the relevant stakeholders in your organization to identify the business needs they have for sites. This planning step will help you determine how many site collections you need to create, what site templates to use, and how to configure them. For information about getting started with this process, go to Manage site collections and global settings in the SharePoint admin center and SharePoint Online Planning Guide for Office 365 Enterprise and Midsize. For information about managing permissions and SharePoint groups, go to Introduction: Control user access with permissions.

When you're ready to build out your sites, follow the instructions to create site collections one at a time in the SharePoint Online admin center, or to create multiple site collections at once and then apply SharePoint groups to them by using PowerShell cmdlets in the SharePoint Online Management Shell.

Set up devices and dial-in options for Lync Online

If your subscription includes Lync Online, make sure your users can connect to meetings and peer-to-peer sessions.

To make your devices work with Lync Online

Lync automatically detects your audio and video devices, such headsets, microphones, speakers, and cameras. You can change your devices at any time, and change the settings to ensure high quality. We strongly recommend that you check your devices before joining a meeting or making a call. For more information, go to Set up Lync audio and video devices.

To set up dial-in conferencing

With dial-in conferencing, you can add telephone access to Lync Online meetings for users who can't get to a computer. That means they'll be able to join the conference by dialing in from a phone. For more information, go to Configure dial-in conferencing.

Start using Office 365 in your organization

Before you roll out Office 365 to the rest of your organization, take some time to prepare your users and help desk with the information they need for a smooth transition.

To prepare your help desk
Make sure your help desk staff has the resources to help users who contact them. Here are some resources you can share with them before you have the rest of your organization start using the services:

> Discover Office 365

> Training courses for Office 365 for business

To prepare users to sign in and start using Office 365

1   Send each user an email message with the information they need to get started:
> Office 365 portal: https://portal.microsoftonline.com

> Outlook Web App: http://mail.office365.com

> Directions for setting up mobile device: **Settings** ⚙ **> Office 365 settings > Get started > Phone & tablet**

> Office 365 tips and ideas: http://fasttrack.office.com/GettingStarted

> Contact information for support staff

2   Create a customized message for the rest of your users by downloading the Office 365 is here template and sending the information to users.

Complete your deployment

Congratulations, you're done!

3.
Configuring optional settings

Now that you've got Office 365 up and running for everyone, explore some of the ways you can tailor it to deliver even more value to your organization.

Deliver a Federated Identity Management experience

When you enable single sign-on, users in your organization can access the service with fewer prompts. It also helps you to enforce your organization's password policies and account restrictions.

For more information about identity management, go to Prepare for directory synchronization.

Unify the experience across Exchange Server and Exchange Online

You can deliver the look and feel of a single Exchange environment whether your users are on-premises or in the cloud. When you choose a hybrid deployment, features such as free/busy status and calendar sharing are available to users across Exchange Server and Exchange Online.

For more information about hybrid deployments, go to Exchange Server 2013 hybrid deployments.

Safeguard your email with Exchange Online Protection

Microsoft Exchange Online Protection helps guard your organization against spam and malware, and it includes features to safeguard your organization from messaging-policy violations. Make sure it's properly configured and learn from best practices.

For more information about Exchange Online protection, go to Best practices for configuring Exchange Online Protection.

Enhance and customize SharePoint Online sites

Explore the ways you can customize SharePoint Online to help users be more productive:

> Enable site mailboxes to store and organize project- or team-level email.

> Configure the Search Center to optimize the search experience across sites.

> Add apps for SharePoint to sites to provide targeted solutions for end-user business needs, or configure Business Connectivity Services (BCS) to integrate business data stored in external applications.

For more information, go to Manage site collections and global settings in the SharePoint admin center.

Extend your on-premises SharePoint investments to the cloud

Hybrid deployment is the right approach if you're running SharePoint on-premises already and want to integrate it with Office 365 to enable cross-premises search, application integration through Business Connectivity Services, or integration of SAP processes through Duet Enterprise Online for Microsoft SharePoint.

For more information, go to Hybrid for SharePoint Server 2013.

Further reading

The following table lists links to online resources that provide more information about the topics covered in this document.

Resource	Description
Office 365 FastTrack Deployment Center (http://fasttrack.office.com)	The FastTrack deployment resource center. Use these resources to get customer-facing deployment content. The most current content is available on this site.
Office Ignite Readiness (http://ignite.office.com)	Gain access to Office technical readiness content, events, and resources.
Office 365 Public Roadmap	Access information about Office 365 features and the release timeline.
TechNet center for Office 365	Get the info IT pros need to deploy, integrate, and manage Office 365 services for enterprises or large organizations.
TechNet center for the new Office	Get the IT pro resources you need to try the new Office (Office 2013 and Office 365 ProPlus) including details about activation, compatibility, and deployment.
Office IT Pro Blog	Read topics about Office deployment and compatibility issues. Includes articles about Office Telemetry.
Office 365 Trust Center (http://trust.office365.com)	Get information about trust-related topics. As an Office 365 customer, you have entrusted Microsoft to help protect your data. Microsoft values the partnerships we have with our customers and places great emphasis on protecting the privacy and security of customer data.
Office 365 Service Descriptions	Get detailed descriptions of the services and features that are available with Office 365.
Service Updates for Office 365 for enterprises	Find information about the latest features and improvements to Office 365. Note these updates are shown for the currently operating service.

Appendix: Windows PowerShell script samples

The scripts in this section are provided with the intent to help you in deploying Office 365. Microsoft Corporation (or based on where you live, one of its affiliates) does not provide any guarantees or support services related to these script samples.

You may use them at your own risk.

Show the list of license SKUs for your Office 365 tenant

1 Connect PowerShell and sign in to Office 365:

```
Connect-MSOLService
```

2 List the account SKU IDs that can be used for setting licenses:

```
Get-MsolAccountSku | Format-Table AccountSkuId
```

Create new users in bulk and add a license

1 Connect PowerShell and sign in to Office 365:

```
Connect-MSOLService
```

2 Create the file **NewUsers.csv** with columns as follows:
FirstName, LastName, DisplayName, UPN, UsageLocation, AccountSkuId

Note: *UPN=user@contoso.com* and *UsageLocation=Two-letter country code* such as **US**.

3 Import the .csv file, create user accounts, and assign licenses:

```
Import-Csv .\NewUsers.csv|%{New-MsolUser -UserPrincipal
Name $_.UPN -DisplayName $_.displayname -FirstName
$_.firstname -LastName $_.lastname  -UsageLocation
$_.usagelocation -LicenseAssignment $_.AccountSkuId}
```

Set licenses in bulk for many users

1   Connect PowerShell and sign in to Office 365:

```
Connect-MSOLService
```

2   Create the file **SetLicences.csv** with two columns:
Userprincipalname, AccountSkuId
Example:

```
john@contoso.com, contoso: ENTERPRISEPACK
```

3   Run the following command:

```
Import-Csv .\SetLicense.csv|%{Set-MsolUserLicense -User
PrincipalName $_.UserPrincipalName -addlicenses
$_.AccountSkuId}
```

Get the latest information at http://deploy.office.com