

Microsoft Office 365 Migration Service Definition

Why you need this?

The Microsoft 365 suite, including Office 365, contains all the productivity applications, plus additional cloud and security services. Fordway's MS Office 365 Migration service is designed to provide a smooth transition between existing on premise, or other solutions, to the Office 365 suite. Fordway will also maximise the capabilities and potential for all organisations of their MS Office 365 subscriptions.

As with all migrations, organisations only go through this process once. They generally lack the in-house skills, as the IT team is mostly concerned with BAU. Collaborating with an experienced service company with multiple years of performing these migrations is essential to minimise the risks. Fordway have the experience and skills to assist organisations, ensuring a smooth transition.

When migrating services from on premise or other cloud services into Office 365, there are three main elements that require migration, plus a fourth if Teams Voice is to be used for telephones:

- **Email and calendars – to Exchange Online**
- **Data and collaboration – to SharePoint Online**
- **Unstructured file data – to OneDrive or Azure files for file types OneDrive doesn't support**
- **Existing/legacy phone system to Teams Voice**



Fordway offer services to assist for each of these requirements, plus the complete migration of organisation data to cloud solutions, in a secure, reduced risk implementation.

No matter which migration an organisation is preparing for it is essential to perform a detailed assessment first. This will include an inventory of:

- **Accounts:**
 - User
 - Administrator
 - System
- **Sizes (and locations):**
 - Mailboxes
 - File storage
 - Shared drives
 - File types
 - Data in archives or stored off-line
 - Client Versions and configurations
 - Online meeting and Instant Messaging systems - Third party applications and any integrations

The duration of this assessment will depend on the size of the environment but for a mid-sized organisation (250 – 1000 users) expect it to take three to four weeks. Any time spent here is more than recuperated during the actual migration phases.

Change Management experts

The other key element in any migration is to prepare the users for the upcoming change. It is vital to get them onside, by selling the benefits, providing training, keeping them involved. Also train your service desk and let everyone know if and when there will be downtime. Also, be honest, if the timings change, don't keep them in the dark, tell them and why. They are much more likely to be positive, if you are.

The different migrations Fordway can perform are:

- Exchange Online migration
- Sharepoint Online migration
- OneDrive Migration



Exchange Online migration

Email is normally considered a critical application within most organisations. The key with a migration is to ensure that both sides, the old and new systems, can send mails and see/amend calendar entries. Plus use other technologies like video calls and messaging.

There is a plethora of tools available to assist and simplify the migration, both from Microsoft and third parties, such as Quest. It is vital to review the unique business requirements at the outset and then select the appropriate tools and process.

There are also archives and old PST files that may need to be included and don't forget any mail links into other applications and legacy systems. On the flip side, there is likely to be mails and files stored that really don't need to be migrated and will slow you migration down considerably. Security and compliance considerations needed to be included as well. Finally, a backout or recovery plan must be available, just in case the migration doesn't work out as planned (e.g. migrate wrong user, network error). Careful planning of email migrations is essential.

Below are some of the migration platforms, which can be migrated from:

- Exchange 2003/2007
- Exchange 2010/2013/2016
- Google Workspace (formerly G-Suite)
- IBM Notes

- Other IMAP solutions Complete separation on device, no corporate visibility of personal data
- Consolidated dashboard and reporting with other end user devices

SharePoint Online migration

Microsoft provide a SharePoint migration tool. However, this just migrates from older versions to SharePoint online in a more-or-less 'as is' state. What Fordway know from years of experience is that very few organisations actually want their new site to be exactly the same as their old one. This is due to several reasons:

- Existing system designed within constraints of older versions, that no longer exist
- Take advantage of new features
- Metadata & search criteria requirements
- Complete re-write of locations or multiple pages

Fordway are not only aware of the different tools available, we also have the SharePoint expertise and pre-existing scripts to assist in making the changes much simpler and faster than via any toolset.

- The source applications supported are:
- SharePoint Server 2010/2013/2016/2019
- SharePoint Foundation 2010/2013
- Office SharePoint Server 2007 & WSS 3.0
- Exchange Public Folders
- eRoom (OpenText)

OneDrive migration

Within any organisation, over the years, the sheer amount of unstructured data has just grown exponentially. Bulk migration tools will just take what exists and move it to another location, verbatim. This is an excellent opportunity to review the data to be migrated and limit the migration to what is needed for the business. Fordway will take control of the process and in collaboration with the customer create and agree formal policies for the migration, produce tests based on these policies and then implement against the live data.

Exclusions can be as simple as any .JPEG file or specific sub-folders or potentially more granular. Fordway will spend additional time during preparation ensuring these parameters are fully understood prior to any migration occurring.

The source locations supported to migrate files onto OneDrive include:

- Local file shares
- NAS devices and off-line folders
- Tenant-to-tenant file migration
- Google Workspace

Key Benefits

- **Experience** – over the last 30 years, Fordway have successfully completed thousands of application and data migrations. While the tools, platforms and technologies have changed, the principles, process and checks haven't. We know how to do this.
- **Independent** – Fordway do not have a one-size fits all solution. Every situation is unique, we work with each client to ensure their success.
- **Experienced personnel** – From business, project management and technical viewpoint, Fordway have multi-years of experience of real-world migrations and a 'can do' attitude.
- **Comprehensive pre-migration assessment** – Fordway will perform a detailed analysis of source and target systems to ensure migration is smooth and fully understood, removing potential pit falls from later in the process.
- **Collaboration** – Fordway's personnel will work alongside your IT staff and any third parties collaboratively, as each has skills necessary to resolve any issues.
- **Detailed knowledge of migration tools** – Fordway have the option to utilise a suite of tools, depending on requirements.
- **Understand legacy** – Fordway know companies have legacy systems and key departmental files and applications with potential integrations that are critical to the business. We will ensure they don't break and are migrated successfully.
- **Only migrate what is necessary** – For security and compliance reasons, only migrate the files necessary
- **Clear Recommendations** – Fordway will produce a set of costed recommendations on how to perform the migrations, including tools.

Key Features of Fordway's Approach

Fordway's approach, is ultimately flexible but the generic steps taken for every engagement are:

- Create and sign off Project Initiation Document
- Initiate Project Board
- Agree on areas to be migrated
- Inform users (keep informed throughout the process)
- Perform pre-migration assessment
- Review assessment findings
- Finalise costings and recommendations for migration approach
- Agree project team and roles/responsibilities
- Create detailed migration plan including roll-back options
- Create training material
- Formerly notify users
- Install and configure tools
- Establish co-existence
- Test co-existence and migration processes
- Finalise processes, plans and timings
- Migrate agreed users/groups (automated as much as possible)
- For each group
 - Confirm roll-back not required
 - Confirm accounts active
 - Confirm system/data access
 - Ensure third party apps still functional
- Continuous monitoring and revision of processes, as necessary
- Migration completed

The duration and complexity involved in each of the high-level steps listed above, is dependent on the nature of the engagement. It is expected that full project controls and documentation will be supplied as part of the engagement (Project Manager, RAID, Exception, Highlight logs/reports). A commensurate level of resource will be required from the customer.

Service Terms

Service Initiation (on-boarding)

The service is a consulting engagement. The following procedure will be used to provide the service:

- Provide a combination of Project Manager, Account Manager, Relationship Manager, Lead Consultant and appropriate consultancy team, depending on the scope of the engagement. Fordway will generally seek to provide a peering alignment with the customer
- Agree and formalise Non-Disclosure Agreements
Review the customer requirements and determine the contractual requirements
- Agree the scope of the engagement with the customer and provide a Project Initiation Document which will define the engagement.
- Schedule work
- Commence engagement
- Provide deliverables
- Complete engagement
- All engagements are run to Fordway's PRINCE2 Agile processes

Service Levels

As this service is a consultancy engagement there are no specific SLAs to be applied.

Service Constraints

There are no specific constraints to this service.

Financial Recompense

As this service is a consultancy engagement there are no specific recompense structures provided.

Service Connectivity

Required connectivity to access the Customer's Azure environment will be defined as part of the Project Initiation Document.

Trial of Service

Not applicable to this service.

Data Security

Any information processed by Fordway will be transitory in nature and Fordway will comply with the customer's data security procedures during the engagement and off-boarding.

Training

Fordway will provide skills transfer as part of the engagement where applicable.

Customer Responsibilities

Fordway will comply with data access restrictions and other information security policies as mandated by the customer and required within Fordway's own organisational security controls; these are defined as part of the project scoping. The customer is required to provide the necessary resources and information to allow Fordway to achieve the service deliverables agreed.

Change Management

As the engagement will be project managed, any changes in requirement will go through the process identified in the Project Initiation Document.

Technical Requirements

There may be a need to install and configure tools, agents and updates to support the service which will be defined within the Project Initiation Document if appropriate. All changes will be applied through change control with relevant communication and scheduling.

About Fordway

Fordway offers over 30 years' experience advising and delivering strategic IT infrastructure and IT service delivery change to complex enterprises.

We develop deep and lasting relationships with our customers founded on integrity and trust, evidenced by our multiple ISO certifications within our Microsoft Gold Partnership.

We will help you develop your strategy and review the options relevant to your organisation. Our advice will be aligned to your business requirements. We then assist with the ongoing operational management and optimisation of the resulting cloud service, based on best practice defined by the ITIL service management framework.

Ordering

Fordway's services can be ordered by contacting your Fordway account manager or other members of our team on **01483 528200**, emailing sales@fordway.com or using the contact form on www.fordway.com

Our Accreditations

ISO 9001
ISO 14001
ISO 27017
ISO 27018
ISO 20000
ISO 27001



Gold Cloud Productivity
Gold Cloud Platform
Gold Datacenter
Silver Application Development
Silver Small and Midmarket Cloud Solutions



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