

Office 365 Exchange migration plan

1. New setups

1. Setup your account with Microsoft through the [365 portal screen](#) or get help from a partner like TechQuarters to do it for you.
2. If you are a new user then, click on new user and you will be presented with this screen: [new 365 user](#)
3. Buy new licenses or set up a trial
4. If you set up a trial, it will last for 30 days and gives you 10 user licenses on Exchange, SharePoint and Lync.
5. You can then buy the new licenses and upgrade at any time in the 30 days.
6. The next step is to setup your computer through the setup tasks presented on the screen. If you are a MAC user, it will detect that and will ask you to perform a few updates to make it compatible. Office 2008 or above, for MACS, works with Office 365.
7. Watch the tour of office 365 here [Office 365 product tour](#)
8. If you want to migrate to your own domain, that needs more technical work as follows.
9. Verify and activate existing domains. This is done through adding a text or a mx record to your host DNS
10. Purchase licenses through partner online within the portal.
11. Add the number of users and set up their mailboxes
12. Setup user privileges
13. Set up distribution lists in the email
14. Prepare all desktops and mobile devices with new profiles to point to the 265 servers. This can be done remotely but nothing beats visiting a desktop as there are always some tweaks to the setup required depending upon the individual desktop.

2. Migration of old emails

1. This can be done by several methods but the majority are done using the Exchange migration tool for an existing on premise server such as SBS 2003
 - a. Ensure the same users are set up on the Office 365 portal and the in house portal
 - b. Then choose date range or all emails to migrate up to the portal
2. Then change the MX records to point to the new mailboxes
3. Then advise all users to switch to the new profile
4. Then delete old profiles from all devices
5. Things not to forget
 - a. Ensure old signatures are ported
 - b. Ensure any lingering archive.pst folders are either reattached or uploaded on to the new mailbox

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- c. Ensure users fonts and sizes are the same in the body of the email creations
- d. Ensure the users have all their contacts and these are synched to their mobile device or they won't have names attached to numbers and it's hard to remember all the old mobile number without names.
- e. Ensure users have the Helpdesk number after the migration

3. BPOS migration

- 1. No tools are provided as of yet to migrate through a simple synchronization.
- 2. MS have told us there are no planned updates to provide a synch tool for a minimum of 4 months and a maximum of 12 months
- 3. You can't authenticate the same domain on both systems. 1 system at a time, therefore careful planning is required to set one up and migrate domains, then emails over a weekend, to avoid user frustration.
- 4. Because the system is on a new server the same desktop migration plan needs to happen.
- 5. Use your own migration tools or export and import.

4. Next Step

Thanks for reading this and we hope it has provided some help for your migrations.

If you would like TechQuarters to perform this for you or indeed help you plan it, then please do give us a call on **0800 148 8001** or email tellmemore@techquarters.com.

Yours sincerely

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