



# Business Productivity Online Standard Suite Introduction to Transition

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## Introduction

In June of 2011, Microsoft released a major service update to the Business Productivity Online Suite (BPOS). The service update, called **Microsoft Office 365**, will include new features and offerings, architectural changes to the underlying Microsoft Online Services platform, and an upgrade of datacenter server applications based on Exchange Server 2010, SharePoint Server 2010 and Lync Server 2010 (formerly known as Office Communication Server).

The transition from BPOS to Office 365 does not represent a new version or product for Microsoft Online Services customers. Office 365 is an evolution of BPOS. The transition does, however, represent a major architectural shift for Microsoft's Online Services architecture from on-premises servers adapted to the cloud, to a fully-rearchitected service-oriented design. This is the reason that there are some impacts in terms of system requirements and configuration of optional features such as federated identity and rich co-existence.

One of the key values of Microsoft Online Services is that **customers are not required to re-deploy or upgrade server software, nor are they required to migrate data** when new features and capabilities are available or services are updated. This will hold true for the transition process that enables the new features and capabilities of Microsoft Office 365. **All server infrastructure updates and data migration will be handled by Microsoft.** Microsoft is committed to ensuring that **the transition** from BPOS to Office 365 is simple for customers, **will minimize disruptions** to end-users, and will **maintain the security and integrity of customer data** at all times.

The underlying 2010 server technology that drives Office 365 was architected to run as a service in the cloud and to enable seamless updates to the service. This new architecture means that **future major service updates** to the Office 365 service **should have an even lower overall impact on customers** than the transition from BPOS to Office 365.

This guide provides an overview of how existing BPOS customers will need to prepare for the transition from BPOS to Office 365.



## Key Product Concepts

Product	Description
Office 365	A suite of hosted communication and collaboration services that includes Exchange Online, SharePoint Online and Lync Online
Microsoft Office Client or "rich client"	Describes Microsoft Office client software that is installed on end-user computers, including Office 2010, Office 2007 SP2, Office 2010 Pro Plus
Microsoft Office 2010 Professional Plus	A subscription licensing model for Microsoft Office 2010 client software Office 2010 Professional Plus subscription licensing is not offered in all Office 365 subscription plans
Office Web Apps	A browser-based version of the Microsoft Office client that allows end users to read and edit Microsoft Office documents. Office Web Apps does not provide all the capabilities of the Microsoft Office rich client.  Office Web Apps document reading capability is part of SharePoint Online and is available in all SKUs. Not all SKUs offer a version of Office Web Apps with the ability to <i>edit</i> documents in a browser.



## Planning Checklist

The following tables summarize high-level planning areas for the transition from BPOS to Office 365:

Planning Item	Description
Start learning about new features in Office 365	<p>All of the services within the Office 365 suite have significant new features and functionality.</p> <p>For a more detailed discussion of the features and benefits of Office 365, please refer to <a href="http://office365.microsoft.com">office365.microsoft.com</a>.</p>
Understand new Office 365 products	<p>Visit <a href="http://office365.microsoft.com/office365-plans.aspx">office365.microsoft.com/office365-plans.aspx</a> to learn about the subscription plans available to the <a href="#">enterprise</a> and <a href="#">education</a> markets.</p>
Understand Office 365 System Requirements and the Transition Process	<p>For the most up-to-date information on transition, please visit <a href="http://microsoft.com/online/transition-center.aspx">microsoft.com/online/transition-center.aspx</a>.</p> <p>This document discusses the system requirements for Office 365 and the transition process in detail.</p>
Learn about Lync and Lync Server 2010	<p>Visit <a href="http://lync.microsoft.com">lync.microsoft.com</a> to start learning about Lync Online and how the conferencing experience will change with the transition from Live Meeting to Lync Online</p>
Optional: Start learning about federated identity and ADFS	<p>Office 365 will support single sign on via federated identity. You will need to deploy Active Directory Federation Services on premise to establish a federation relationship with Microsoft Online Services and provide true single sign-on capability.</p> <p>Visit <a href="http://onlinehelp.microsoft.com/en-us/office365-enterprises/ff637606.aspx">onlinehelp.microsoft.com/en-us/office365-enterprises/ff637606.aspx</a> for more information.</p>



Optional: Start learning about rich coexistence in Exchange Online with Office 365

Visit [technet.microsoft.com/library/gg577584.aspx](https://technet.microsoft.com/library/gg577584.aspx) to learn more about rich coexistence for organizations with both on-premise and cloud Exchange Servers.

Enabling rich coexistence will require that you deploy an Exchange Server 2010 CAS server role on premises which will allow Exchange Online and your Exchange Server infrastructure on-premises share free/busy information between users with an online mailbox and users with an on-premises mailbox.



## BPOS to Office 365 Transition Overview

### Transition Roles and Responsibilities

#### Microsoft Responsibilities

- Inform the technical and administration contacts (as listed in your BPOS tenant) of the transition
- Schedule your transition for you
- Provide you with information and guidance about the transition
- Prevent any disruption to email flow during transition
- Migrate any and all customer data as required for a full transition

#### Your Responsibilities

- Update end-user computer software to meet the system requirements
- Configure end-user computer software if required
- Re-configure end-user Active Sync devices
- Inform and train your end-users as needed
- Optional: deploy an on-premise Active Directory Federation Services server if you choose to implement ADFS-based single sign-on.
- Optional: deploy an on-premise Exchange Server 2010 CAS role if you have a hybrid on-premise/cloud Exchange deployment and want to share free/busy and other information across servers

### Key Areas of Change

The table below summarizes key differences and areas of change:

Area of Change	Description
The transition from Live Meeting to Lync Online will begin	<p>With the transition to Office 365, you will begin the transition from Live Meeting and Office Communications Online to Lync Online, the next generation of Office Communications Online with unified conferencing features.</p> <p>Please see the <a href="#">Live Meeting Transition to Lync Online</a> section in this document</p>
New System Requirements	<p>You may need to make the following updates to end-user desktops:</p> <ul style="list-style-type: none"> <li>• Office Client: Office 2007 SP2 or Office 2010</li> </ul>

	<p>required</p> <ul style="list-style-type: none"> <li>• Browser: Internet Explorer 7 or higher.</li> <li>• Instant Messaging: Lync 2010 required (Office Communicator is no longer supported and must be removed)</li> <li>• Microsoft Online Desktop Setup</li> <li>• BPOS Sign In applications no longer supported and must be uninstalled</li> </ul> <p>Please see the Understanding System Requirements section for more details.</p>
New Portal Experiences	The Microsoft Online Customer Portal and the Microsoft Online Administration Center will be combined to become the Microsoft Online Portal with new user interface experiences.
URL changes for OWA and Portals	The URLs for Outlook Web App, the administration portal, and the end-user portal will change.
Sign-In application replaced by Microsoft Online Desktop Setup	The Microsoft Online Desktop Setup is a run-once tool which will automatically configure and update end-user computers for Office 365.



## Availability and Timeline Overview

The following table provides a high-level timeline of key milestones for Office 365.

What	Availability Date	Comments
Transition Availability Begins	September 2011	This date represents the period when Microsoft will be able to transition most BPOS customers. Microsoft will contact you 60 to 90 days prior to let you know when you should be ready for transition.
Blackberry Enterprise Server Transitions	Late 2011 or early 2012	Exact dates depend on the availability of the hosted Blackberry Service from RIM
Customers in Brazil	February 2012	
Educational Customers (CASA/EES)	Summer 2012	Educational customers with a Campus and Schools Agreement or Enrollment for Education Solutions agreement will be eligible for transition during the summer break of 2012
Transition Availability Ends	September 2012	All customers must complete the transition by September of 2012.

## Transition Communications Overview

Communications	Date	Comments
Microsoft provides ongoing reminders and communications about upcoming transition date	Ongoing	Microsoft will send ongoing reminders and communications via email and in the Microsoft Online Administration Center
Customer begins planning for transition	As soon as possible	Visit the transition center at <a href="http://microsoft.com/online/transition-center.aspx">microsoft.com/online/transition-center.aspx</a> for the latest information. If you have a Microsoft account representative or partner, you should reach out to them to discuss planning for the transition.
Microsoft schedules your transition date		Microsoft will contact you via email with a Be Ready date and, subsequently, a transition date.
Transition reminder emails		Microsoft will send ongoing reminders and communication via email as your transition approaches.
Transition occurs	Scheduled transition date	The transition itself will happen overnight or over the weekend.

## Scheduling Transitions

Most customers will receive three scheduling communications:

- First, you will receive an email advising you to complete all transition preparation by a specific date, called your “Be Ready” date, because you will be transitioned in the weeks thereafter.
- Second, you will receive a communication on or after your “Be Ready” date providing a window in which your transition will occur.
- Third, you will receive an email either before or during your transition window providing you a specific transition date. If you have further questions about transition scheduling, please review the Frequently Asked Questions on the [Microsoft Office 365 Transition Center](http://Microsoft Office 365 Transition Center).



## Pricing, Licensing and Offerings

With the exception of SharePoint Online Deskless Worker, a full transition as described in this document will have no impact on a customer's subscription status, billing status, licensing agreement or contract.

The following table summarizes how BPOS Subscriptions will translate to Microsoft Online Services offerings after transition.

Current BPOS Subscription	New Subscription
BPOS Standard Suite	Office 365 (Plan E1)
BPOS Deskless Worker Suite	Office 365 (Plan K1)
Exchange Online	Exchange Online (Plan 1)
Exchange Online Deskless Worker	Exchange Online Kiosk
SharePoint Online	SharePoint Online (Plan 1)
SharePoint Online Deskless Worker	SharePoint Kiosk (K1)
Live Meeting Standard	Lync Online (Plan 2)
Office Communications Online	Lync Online (Plan 1)

## Switching to a Different Offering

If you want to take advantage of a new subscription plan after you transition, call customer support to make the change. You cannot upgrade from the E1 or K1 plans until after you transition. You can learn more about the subscription plans available to the [enterprise](#) and [education](#) at [office365.microsoft.com/office365-plans.aspx](http://office365.microsoft.com/office365-plans.aspx).

## How Existing Customers can Try Office 365

If you would like to tryout the new features and functionality in Office 365, feel free to sign-up for a trial on Office 365. This should be viewed as a way to "kick the tires." Data from your production subscription cannot be merged with an existing Office 365 service. Please note that you cannot use your existing BPOS domain in the beta.



## Understanding System Requirements

Office 365 has a number of important changes to the system requirements for BPOS. The most detailed list of software requirements can be found at <http://onlinehelp.microsoft.com/office365-enterprises/ff652534.aspx>.

### New Password Requirements

Office 365 has an updated strong-password policy that differs slightly from the BPOS password policy. When users reset their passwords via the normal password expiration process, new passwords must meet the following requirements:

- Passwords must be between 8 and 16 characters
- Passwords cannot contain characters from different language sets, e.g. Arabic or Greek or German. Only basic, English-language letters and symbols, called ASCII characters, are allowed. ASCII characters include:
- A-Z, a-z, 0-9, ! @ # \$ % ^ & \* - \_ + = [ ] { } | \ : ' , . ? / ` ~ " < > ( ) ;
- Passwords cannot contain the username alias (part before @ symbol)

### Live Meeting Transition to Lync Online

Microsoft Lync Online, part of Office 365, is the next-generation of instant messaging, web conferencing and audio/video telephone calling.

Lync Online will replace Office Communications Online and Live Meeting. You can begin the process of transitioning from LiveMeeting to Lync Online for conferencing once you have been notified that the Office Communications Online servers have been upgraded.

Customers are advised to:

- Deploy the Lync client which will deploy the Lync Outlook Add-in
- Remove the Live Meeting Outlook Add-in
- Instruct end users to reset recurring meetings to Lync Online with a single button click in the meeting to convert a Live Meeting to a Lync Online meeting
- Point end users to [Lync Online web site](#) for short videos on how to use the product

The LiveMeeting service will continue to operate before, during and after your transition. Meetings scheduled with Live Meeting prior to your transition do not need to be changed to Lync Online meetings: users will be able to join meetings previously scheduled on the Live Meeting service through at least 2013, though they will only be able to schedule new meetings with Lync Online. This will allow the end user experience for Live Meeting to move gradually and naturally to Lync Online, rather than a hard cut from one web conferencing service to another.

The Live Meeting client and Office Communicator 2007 client are not supported with Lync Online in Office 365. End users must use Lync to schedule all new meetings.

## The Transition Experience for Customers

### Overview of the Phases of Transition

The transition experience can be divided into three phases:

Phase	Description	Duration
1. Plan, Prepare and Pilot	Learn about transition and begin planning and preparation activities, including required end-user software changes.	Variable 3-6 months
2. Transition	Microsoft enables new features and functionality	48 hours Typically a weekend
3. Configuration	Configuration of end-user computers, mobile devices, server applications, etc. as needed	Variable 24-48 hours

### Transition Experience for Administrators

#### **Before Transition, the Administrator:**

- Receives initial notification about the transition
- Receives email advising the company to "Be Ready" for transition by a specific date
- Updates DNS

#### **During Transition, the Administrator:**

- Cannot make changes to the service in the Administration Center. Only the information panel is displayed; all other areas are locked
- Receives links to familiarize with new environment and post-upgrade tasks

#### **After Transition, the Administrator:**

- Is signed out of admin portal and must sign back in (using same username/password)
- Is redirected to the new Administration Portal
- Signs in to new Administration Portal (again, using the same credentials)

- Reviews post-transition information
- Creates or assigns a Billing Administrator, and ensures that the Billing Administrator has updated payment information on migrated subscriptions

## Transition Experience for End-Users

### ***Before Transition, End Users:***

- Review information from their Administrator
- Follow any instructions concerning required client software installation: Office, Lync, Internet Explorer, and the Microsoft Online Desktop Setup.

### ***During Transition:***

- SharePoint site collections will be locked to 'Read Only'
- Outlook will continue to function, mail flow continues to work
- Users may be prompted to re-start Outlook after transition period ends
- Previous Outlook Web App (OWA) URL will stop working
- Active Sync devices will not be able to connect to Exchange Online with previous configuration

### ***After Transition, End Users:***

- Are presented with a new Sign-in page, and sign in with their existing UserID@Company.Com and Password
- Outlook and SharePoint work immediately
- Outlook will automatically re-configure
- SharePoint URLs will direct to new SharePoint Online
- Manually reconfigure OWA URL with URL provided by administrator, replacing any old bookmarks
- Manually reconfigure Active Sync mobile devices, following instructions provided by administrator. Microsoft will provide more detailed information about reconnecting RIM devices before the launch of Office 365.

## Key Transition Business Decisions and Actions

The following table summarizes key considerations and decisions that customers should make in preparation for transition:

Consideration	Decision /Action	Comments
User accounts cannot be locked or deleted during the 48-hour transition period	Any employee terminations should be handled prior to the transition weekend.	Only Microsoft customer support will be able to suspend or delete a user account during the transition period.
Office 365 requires Office 2007 SP2 or Office 2010	If you have users running Office 2003, you will need to decide how to deploy updates to end user computers, and/or if you will have some users Office Web Apps instead	Microsoft recommends that you always use the latest versions of Office software, and promptly apply all security and other patches
Office 365 requires Internet Explorer 7 or higher on Windows Vista or Windows 7 for all Microsoft Online portals	Upgrade Internet Explorer 6 if necessary on end-user computers prior to transition	Microsoft recommends that you always use the latest browser software and promptly apply all security and other patches
Office 365 requires the new Microsoft Lync client for Lync Online	Upgrade Office Communicator 2007R2 on end-user computers prior to transition	
The Microsoft Online Desktop Setup is required for configuration and update of end-user computers	Install the Microsoft Online Desktop Setup on end-user computers prior to transition	The Microsoft Online Desktop Setup can be run from the downloads section of <a href="http://portal.microsoftonline.com">portal.microsoftonline.com</a> .
Office 365 requires an upgrade to the Microsoft Online Directory Synchronization application	Apply the upgrade to the Microsoft Online Directory Synchronization application	
Office 365 will begin the transition from Live Meeting to Lync Online	After transition remove the Outlook Live Meeting Add-In	

	<p>from Outlook on end-user computers. The Lync Online Outlook Add-In will be automatically installed with the installation of the Lync client. Start using Lync Online to schedule online conferences after transition.</p>	
<p><b>Optional:</b> Decide which identity option to use</p>	<p>Deploy ADFS role on premises</p>	<p>Location-based IP filtering may require all end-user desktops have Windows 7 installed. Microsoft will provide more detailed information prior to September 2011</p>
<p><b>Optional:</b> Decide whether rich coexistence will be a requirement</p>	<p>Deploy Exchange Server 2010 CAS role on-premises</p>	<p>Exchange Online in Office 365 will offer rich coexistence that includes free/busy availability sharing between on-premises and online users. Rich coexistence requires an Exchange Server 2010 CAS role deployed on premises.</p>



## Customer Support for the Transition

### Microsoft Online Services Technical Support

You will continue to have access to the same 24x7 technical support that you currently receive via online help or the phone. For more information, visit [microsoft.com/online/help/en-us/helphowto/homepage.htm](https://microsoft.com/online/help/en-us/helphowto/homepage.htm). You can also post questions in the transition and Office 365 forums located at [social.technet.microsoft.com/Forums/en-us/bpostransition](https://social.technet.microsoft.com/Forums/en-us/bpostransition), and [community.office365.com/enus/office365/default.aspx](https://community.office365.com/enus/office365/default.aspx), respectively.

### Partners

Microsoft partners are a key resource for additional support and information. If you purchased BPOS through a Microsoft partner, you should contact them for additional help. If you would like to work with a partner, the [Office 365 Marketplace](#) can help you select one.

### Resources

The [Microsoft Online Transition Center](#) is a resource for you to get ongoing guidance and documentation as well as to participate in transition-related discussions on Microsoft-hosted discussion forums.