Office 365 Migration: Challenges and Solutions

Many organizations are looking to make the move to Office 365. In fact, it’s estimated that the penetration of Office 365 will more than double within the next two years. Considering the advantages of Office 365, this move to the cloud is understandable.

Office 365 Advantages Include:
+ Access from any web-enabled device, anytime, anywhere, including mobile devices
+ Scalable deployment allows you to easily scale the number of licenses
+ Automatic updates to the latest versions of Office 365
+ New tools for better collaboration, including Lync/Skype for Business, for quick chats, voice calls, and video conferencing
+ Reduced maintenance, hardware, and staffing costs
+ Fixed rates give certainty over costs for planning and budgeting purposes
+ Reduced downtime with guaranteed 99.9% uptime

Important Considerations When Migrating to Office 365
There are a number of things to consider and plan for before making the move to Office 365.

AREAS TO CONSIDER BEFORE MAKING THE DECISION TO MOVE:
- **Which Office 365 plan you need:** You cannot subscribe to Office 365 itself and must choose a specific plan. These plans include other products such as the Office Suite, Sharepoint, or Yammer, depending on the plan that is chosen.
- **Email Security Requirements:** Office 365 offers email security, including anti-virus, anti-malware, and anti-spam capabilities via Exchange Online Protection. You need to determine if Exchange Online protection meets or enhances the current state of email security performance or decide to use a third-party solution such as Micro Focus Secure Gateway.
- **Compliance Requirements:** Microsoft has implemented various compliance features into Office 365; however, some important compliance capabilities, including guaranteed data retention or granular policies for example, are not available in Office 365. Organizations may need to implement a third-party solution such as Micro Focus Retain™ Unified Archiving to ensure full compliance.

Office 365 Retain™ Unified Archiving
Micro Focus Retain™ Unified Archiving to ensure full compliance.

Archiving Requirements: Organizations have differing archiving requirements based on the industry in which they operate. Office 365 has a solution for archiving with Exchange Online Archiving. However, this solution may not meet the exact needs of your organization. The limitations of Office 365 archiving and the solution to these limitations with Retain Unified Archiving are outlined below.

- **eDiscovery Requirements:** Most organizations will face some sort of eDiscovery request, whether it is for an Early Case Assessment as a result of litigation, an information access request, or an internal HR investigation. The ability to quickly access and provide data pertinent to the request is essential. Office 365 includes some eDiscovery capabilities, but they are limited. These limitations and the benefits of the built-in eDiscovery tools in Retain Unified Archiving are outlined on the following pages.
THINGS TO PLAN FOR WHEN MIGRATING:

- **Deployment:** You will need to decide if you will do a full migration to Office 365 or deploy an Office 365 hybrid. Active Directory: It is best practice to maintain your Active Directory server on-premises. This tool is used to migrate and manage user accounts during the migration process and supports single sign-on for employees accessing both on-premises servers and Office 365 services.

- **Pre-Migration Upgrades:** It is important to install the required operational versions of Exchange Server, SharePoint Server, and Lync Server, along with any pre-migration co-requirements. Migrating from older servers to Office 365 may require an intermediate upgrade in order to attain the required minimum standards.

**Best Practices for Managing the Migration Process**

There are a number of tasks that need to be completed in the migration process.

- **Address any Exchange Misconfiguration Issues:** It is important that IT is prepared to address any stability, mailbox corruption, or misconfiguration problems with Exchange that arise during the migration.

- **Prune Content from Exchange:** If your current Exchange Servers are storing messaging data that is no longer required by your organization, archiving the data out of Exchange prior to migration is advisable.

- **Locate and Deal with .PST Files:** For most organizations, their .PST files are scattered throughout the network. It is a best practice to find all of those files and archive them in a third-party archive such as Retain Unified Archiving. This ensures central access to all of your .PST files and prevents multiple silos of data. Microsoft does not have a solution for discovering and importing .PST files. However, there are third-party vendors, such as Micro Focus, that provide these services. Furthermore, Office 365 does not support the use of .PST files.

- **Migrate or Store Archiving Data:** You will have a few choices on what to do with your historical, archived data, or both. You can migrate that data into Exchange Online Archiving, configure Office 365 to work with your current archive, or even implement a new third-party archiving solution such as Retain Unified Archiving.

- **Identify Data that is on Legal Hold:** IT must identify any data currently on legal hold and must exclude it from the migration process.

- **Migrate or Archive Inactive Mailboxes:** Many organizations have a regulatory or business requirement to retain mailbox data of former employees. You can either use the Office 365 Inactive Mailboxes capability to migrate mailbox data, which requires a subscription and additional fees for the for each inactive user, or you can move the inactive mailbox data into a third-party archive such as Retain Unified Archiving, which requires no added costs for archiving inactive user data.

**Archiving Limitations of Exchange Online/Office 365**

Office 365 Archiving lacks important critical capabilities necessary to properly archive your data and perform eDiscovery.

Here are the areas where Office 365 Archiving is inadequate for the enterprise:

1. **No Archiving Support for Additional Platforms:** Office 365 does not archive multi-platform email, social media posts, or mobile device communication.

2. **No Direct Access to Your Data:** Your messaging data is stuck in the Microsoft cloud. What happens if it goes down or if you need to move your data on-premises or to another platform?

3. **The Office 365 Archive Cannot be Accessed by Offline Users:** There is no caching of the Office 365 archive within Outlook. Access is only available with internet connectivity.

4. **Limited Indexing and Searching:** Office 365 or Exchange Online Archiving only indexes 58 specific file types. However, there are hundreds of file types that could potentially be attached to an email message and need to be indexed and searched.

5. **Index Latency:** Office 365 attempts to have files indexed within 15 minutes and needs one hour for the time between upload and availability in search results. But several organizations have experienced up to a 24-hour lag time for search result availability.

6. **Basic Retention Tags and Limited Retention-Disposition Capability:** The retention tags in Office 365 are basic, and the retention-disposition capabilities only include options to retain, delete, or archive based on email age, department, or both. This functionality does not address the granularity most organizations require.

7. **Lack of Protection of Archived Items:** By default, Office 365 does not protect items in the archive from tampering or alteration. This means that archived content cannot be classified as original, immutable content, because it can be changed.
8. No Support for PDF Export: Archived data export in Office 365 is limited to PST format. Organizations may need or want other exporting formats, including PDF for eDiscovery and court mandated searches. PST export also has potential for lost metadata.

9. Continued Charges for Inactive Users: To ensure that In-Place holds are preserved, you must continue to pay for inactive users.

Retain Unified Archiving Solves Office 365 Shortcomings

Retain Unified Archiving provides unified archiving of multi-platform email, social media, and mobile communication data. Retain Unified Archiving provides the tools your organization needs to ensure your communication data is securely archived and mitigates your risk for data loss and compliance violations.

With Retain Unified Archiving, Office 365 and Exchange Online customers will have:

1. Email, Mobile, and Social Media Archiving: Retain Unified Archiving archives email plus mobile communication for iOS, Android, and BlackBerry devices along with archiving of Facebook, Twitter, LinkedIn, YouTube, Instagram, Vimeo, Flickr, Pinterest, and Google+ social media.

2. Complete eDiscovery Tools and Data Control: All archived data is accessible within the simple web portal where you can search, publish, and perform eDiscovery from one central location. And all email, social media, and mobile data is monitored and archived in one unified data archive.

3. Offline Access to the Archive via the Outlook Plugin: Retain Unified Archiving allows archived messages to be cached for specified time periods in Outlook, which provides offline access.

4. Comprehensive Indexing and Searching: Retain Unified Archiving indexes any file type using the built-in Lucene® indexing engine or the Retain High Performance Indexing Engine. The Retain Unified Archiving index ensures quick and easy search and retrieval of archived data.

5. Immediate Access and Search of Archived Messages: All messages archived in Retain Unified Archiving are immediately available for access, search, and eDiscovery. There is near-zero latency between the time a message is archived and when it is indexed and available to be searched.

6. Policy-based Retention: Retain Unified Archiving provides fully configurable policies that allow organizations to define the electronic communication data to archive and the retention period for that data. These policies allow archiving based on mailbox type, message source, item type, message status, the age of the message, and attachments.

7. Fully Protected Archive: Retain Unified Archiving prohibits message alteration or deletion, and it supports WORM data storage devices, ensuring that your archive in complete and compliant.

8. Extensive Search and Publishing Tools: Retain Unified Archiving easily searches and exports data through the built-in publishing tools to PST, PDF, or using the built-in publishing tools (Retain Publisher).

9. No Need to Continue Paying for Office 365 Licenses for Inactive Users: If a user is deleted from the live Office 365 system, Retain Unified Archiving will keep all of the archived messages, along with any litigation holds or message tags, for as long as policy dictates.

Retain Unified Archiving: The Key to Successful Migration and Archiving

Retain Unified Archiving gives you the ability to ensure that you have a successful migration to Office 365 and ensures that you have a complete and compliant archive. Simply archive all of your messaging data from your current email system to Retain Unified Archiving, implement Office 365, then tie Retain Unified Archiving into your new Office 365 system. All messages, appointments, tasks, files and folders are migrated to Office 365 and are also archived in Retain Unified Archiving, ensuring that you do not lose any messaging data or files.

Make Future Migrations Simple with the Platform Agnostic Archive

The Retain Unified Archiving archive is platform agnostic, meaning that if you decide to migrate to another email system, you can continue to have your archive in the same central location. Retain Unified Archiving will make that migration simple and will support the new system. You can rest assured that migrating to and from Office 365 will be easy and seamless.

“Much of the information herein was obtained from the Osterman Research white paper, “Best Practices for Migrating to Office 365.”