Roadmap for Leveraging Office 365

University of Wisconsin – Madison
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Introduction

- Microsoft was asked to perform a short review of University of Wisconsin – Madison’s (UW’s) current and future plans for leveraging their Office 365 subscription
- The goal of the review was to create a roadmap for enabling Office 365 at the University that maximizes the value of the subscription
- The review took place between March 24, 2014 and April 11, 2014
- Microsoft interviewed various personnel, inspected available documentation and leveraged their own internal knowledge repositories to develop the roadmap
High-level observations and other notes

- Leveraging Exchange Online is an excellent first step toward gaining significant value from the University’s Office 365 license.

- To fully leverage the subscription, full directory synchronization between the campus Active Directory and the cloud is necessary; this will enable many interesting web-based scenarios such as on-premise SharePoint and Enterprise Voice.

- Additional scenarios will be unlocked when Microsoft modifies its client software to better interact with Shibboleth; when that work is complete, or when the University deploys Active Directory Federation Services (AD FS), many other capabilities become available (OneDrive, Office ProPlus, etc.).
Introduction to the roadmap

- The roadmap that follows shows the various Office 365 and related technologies that could be implemented at UW.
- The roadmap is intended to show the relative project durations as well as timing for the various projects.
- Following the roadmap are pages that provide information about each project, including a description, dependencies, approximate duration, benefits and risks/caveats.
- NOTE: The roadmap is for illustrative purposes only; it is not intended to indicate a commitment by the University to deliver any particular capability.
Roadmap for leveraging Office 365

- Email and calendar migration
- Directory synchronization
- On-prem SharePoint
- AD FS
- Shibboleth support available in Office client applications
- SharePoint Online/OneDrive
- Office ProPlus
- Distribution list migration
- Enterprise Voice
- IAM consolidation
- Lync Online (optional)
- White Pages refresh

NOTE: Each section of the grid represents approximately six months.
Email and calendar migration

Description
This project will transition all campus email and calendaring to Exchange Online, hosted in the cloud. This will include consolidating multiple email addresses to a single email address in Exchange Online, as well as migrating user email messages to the new system. This will enable the University to decommission WiscMail and many other email systems.

Dependencies
None

Approximate Project Duration
1.5 to 2 years
Email and calendar migration

Benefits

- Reduces the cost of operating numerous email systems throughout the campus
- Reduces complexity by consolidating each user’s various email addresses into a single mailbox
- Improves calendaring efficiency and effectiveness by ensuring that each user has a single calendar and that free/busy information for that calendar is widely available

Risks/Caveats

- See the Office 365 Risk Assessment Response document for risks and caveats
Directory synchronization

Description
This goal of this project is to deploy a Microsoft-standard synchronization tool to ensure that identities are identical in both the Campus Active Directory and the cloud directory. In addition, the various administrative tools will be modified to make changes to the local directory whenever possible.

Dependencies
This project can begin at any time.

Approximate Project Duration
3 to 6 months
Directory synchronization

Benefits

- Returns the University to the standard Microsoft approach for cloud identities
- Enables many other technologies such as Enterprise Voice and centralized on-premise SharePoint
- Lays a foundation for future identity and access management consolidation

Risks/Caveats

- If any users are provisioned to the cloud before synchronization is deployed, Forefront Identity Manager will be required for synchronization rather than DirSync
- The more users in the cloud directory, the more potential complexity there will be with the synchronization
On-premise SharePoint

Description
The goal of this initiative is to deploy a centralized, scalable, fault-tolerant and secure SharePoint environment on campus to be leveraged by users and groups throughout the University.

Dependencies
To ensure accurate user data, including email addresses, display names, etc., this project requires directory synchronization to be in place.

Approximate Project Duration
6 months
On-premise SharePoint

Benefits

- Reduces total costs by consolidating many smaller SharePoint environments into one
- Improves the ability for groups and departments on campus to collaborate
- Reduces potential compliance risks by providing a controlled and secured environment for information storage

Risks/Caveats

- It may be difficult to inventory all SharePoint sites that could benefit from migration to a centralized site
- Some more highly customized SharePoint sites may require significant assistance to ensure successful migration
Active Directory Federation Services rollout (optional)

Description
While Shibboleth is widely used for user authentication, this initiative would roll out Active Directory Federation Services (AD FS) to provide improved authentication and authorization functionality for the various Microsoft technologies. As Microsoft is working to provide additional support for Shibboleth and SAML 2.0 protocols in its products, this initiative is not required.

Dependencies
This initiative could proceed at any time, but for it is preferred that directory synchronization already be in place.

Approximate Project Duration
3 months
Active Directory Federation Services rollout (optional)

**Benefits**
- Leverages the most common approach for federated authentication with Office 365, ensuring the best possible experience for users.
- Can leverage Integrated Windows Authentication (IWA) to provide single sign-on (SSO) for logged in domain users to AD FS-federated applications.
- Fully supports all O365 scenarios and Microsoft products (OneDrive, Office ProPlus, etc.) now (no need to wait for Shibboleth support).
- Approaches may exist to allow SSO between AD FS and Shibboleth, providing SSO to Shibboleth for Windows users.

**Risks/Caveats**
- If not implemented carefully, a second authentication method could confuse end users.
Distribution list migration

Description
This project would migrate appropriate WiscList email distribution lists to Exchange distribution lists.

Dependencies
Email and calendar migration should be complete to ensure all users are in Exchange prior to the migration.

Approximate Project Duration
3 months
Distribution list migration

**Benefits**

- Provides the ability to manage distribution lists inside Outlook
- Provides the ability to schedule a DL group in Outlook and see all members’ free/busy information
- Allows starting group chats in Lync using the distribution list’s alias
- Allows expansion of a DL in Outlook to see who is in the list or to remove selected users
- Eliminates the need to use a different tool to manage lists of users

**Risks/Caveats**

- It will be important to coordinate where DL email is delivered during the migration to ensure there is disruption to email delivery
SharePoint Online/OneDrive

Description
This project would turn on SharePoint Online and OneDrive and make them available to University users. SharePoint Online provides a flexible collaboration environment in the cloud and OneDrive provides a mechanism for storing documents securely in the cloud and synchronizing them to a wide variety of devices.

Dependencies
To ensure the best possible experience, these capabilities require either AD FS or the announced updated Office software that supports Shibboleth.

Approximate Project Duration
3 to 6 months
SharePoint Online/OneDrive

Benefits

- SharePoint Online can easily enable collaboration for users both inside and outside the University
- SharePoint Online can help reduce the need for standalone on-premise SharePoint servers
- SharePoint Online and OneDrive can help lower costs by reducing the need for standalone file servers
- Simultaneous document editing and centralized storage can significantly simplify collaboration

Risks/Caveats

- May require significant communication to the user population regarding how to leverage these capabilities
- Governance processes for SharePoint Online must be put in place
Office ProPlus

Description
This project would enable users to gain access to Office ProPlus as part of their University affiliation. Office ProPlus is a subscription-based version of the Office suite, and is available as a part of certain Office 365 subscription plans.

Dependencies
- The University would have to upgrade its Office 365 plan to either the A3 or A4 subscription.
- Either the Shibboleth-enabled versions of Office ProPlus must be available or the University must have deployed AD FS.

Approximate Project Duration
1 to 3 months
Office ProPlus

Benefits

• Ensures that all users have access to a common set of software tools, making collaboration easier
• Provides consistent and familiar Office experience across PC, Mac, Windows tablets, iPads, and most mobile devices
• Integrates with OneDrive and SharePoint to provide a seamless experience when editing files stored in those repositories

Risks/Caveats

• None
Enterprise Voice

**Description**
This project will provide a stand-alone Voice over Internet Protocol (VoIP) offering to enhance or replace the current UW private branch exchange (PBX) systems. In addition, this project will enable all the presence, chat, screen sharing, and conferencing features of Microsoft Lync.

**Dependencies**
Enterprise Voice requires that directory synchronization be in place before it can be fully rolled out.

**Approximate Project Duration**
2 years
Enterprise Voice

Benefits

- Can result in significant cost savings over operating a traditional PBX system
- Can speed communication among departments and communities, improving efficiency and allowing the University to move more rapidly
- Provides the ability to make and receive calls from anywhere using the Lync client or a supported smart phone, providing a more flexible work environment

Risks/Caveats

- A full replacement of the PBX with Lync is a very large and complex project; we recommend conducting a pilot first to determine feasibility
- Particular attention must be paid to E911 considerations
Identity and access management consolidation

**Description**
This is a series of projects designed to simplify the identity and access management (IAM) environment at the University. See the *Directory Services Review Document* for more information.

**Dependencies**
Please see the *Directory Services Review Document* roadmap for dependencies.

**Approximate Project Duration**
1 or more years, depending on consolidation activities undertaken
Identity and access management consolidation

**Benefits**
- Can significantly reduce the cost of providing IAM services to the University
- Can provide additional capabilities depending on which parts of the roadmap are implemented

**Risks/Caveats**
- IAM consolidation is a significant amount of work and should be approached as a series of smaller projects
Lync Online (optional)

Description
Lync Online is a capability currently available to the University, but not activated. If the University deploys Enterprise Voice, this capability will not be needed. However, if the University decides not to deploy Enterprise Voice, leadership should consider enabling Lync Online for all users.

Dependencies
Lync Online should only be enabled if the University decides not to deploy Enterprise Voice.

Approximate Project Duration
1 to 3 months
Lync Online (optional)

**Benefits**
- Provides presence, chat, video conferencing, audio conferencing, and desktop sharing to all University personnel
- Can speed communication among departments and communities, improving efficiency and allowing the University to move more rapidly
- Can be federated with other Lync systems and Skype
- Could allow the retirement of the existing WiscChat system, saving money for the University

**Risks/Caveats**
- Lync Online cannot federate with WiscChat, so if Lync Online is used and WiscChat is not shut down immediately, there will be two disconnected chat systems on campus
White Pages refresh

Description
This project would refresh the existing UW White Pages system to better integrate with Office 365 and Campus AD.

Dependencies
Directory synchronization should be in place prior to beginning this initiative.

Approximate Project Duration
6 months
White Pages refresh

Benefits

- Ensures that all items in the Exchange address book including public Exchange distribution lists, resource mailboxes, etc. are published in the White Pages
- Ensures that Lync information is available in the White Pages, allowing chat to be established directly from the White Pages
- Could be an opportunity to add additional functionality to the White Pages (e.g., display presence information, etc.)

Risks/Caveats

- Care must taken to ensure that only appropriate information is displayed to ensure compliance with applicable regulations