There are many benefits to be achieved by moving your office suite and infrastructure to the cloud. Such a move requires careful evaluation and planning. This guide explains what you need to think about at each step, from the initial discovery process through to project completion.
Being informed is the key to successful migration

Whether you are thinking about moving your organization's office suite to the cloud or you’ve already decided that Microsoft Office 365 is the solution for you, having the right information upfront is essential to make the right decisions.

This guide explains what you need to think about at each step, from the initial discovery process through to project completion. It outlines the data analytics provided by Centrix Software’s 365iQ product, and how to apply that information to reduce costs, risk and project time of your migration. The guide covers all of the points to consider when moving your full productivity suite to the cloud.

365iQ, a module of Workspace iQ, gathers data across devices within an organization. The data is securely reported back to Centrix Software’s SaaS infrastructure, removing the need for complex setup and internal infrastructure costs. Centrix Software provides all of the information you require through both flexible, customisable data views and standard reports. The analytics provided by 365iQ can reduce costs of not only your initial Office 365 purchase, but also your deployment. It helps you determine:

- The fit of Office 365 for your organization against other offerings in the market
- Which licence plan is optimal for a given user or group of users
- Which users’ devices are ready for them to migrate to Microsoft Office 365
- Which users work with non-Microsoft products and how many of those products could be retired as part of a move to Microsoft Office 365
- Where content is stored which your users access today and how easily can you migrate that data
- Which users will require additional work to migrate to Microsoft Office 365
Introduction to Microsoft® Office 365

Benefits, choices and risk reduction

Firstly consider whether Microsoft Office 365 is the right fit for your organization over alternative cloud providers. Google Apps, for example, provides online applications for the most popular office suite formats – email, calendars, documents, spreadsheets and slide decks. Do your users continuously work online and require the most common office applications? Google Apps might be your best fit. The most effective way to determine these key points is to analyse real usage. 365iQ will provide all of the information you need to make this decision.

If your users have more intricate needs like working offline, require complex functionality to perform their work, or currently use Microsoft applications like Project and Visio, Office 365 is likely to be your best fit.

Office 365 is tagged by Microsoft as “your complete office in the cloud”, giving end users access to a number of familiar products which can be accessed both online and offline, where required. Where previous Office suites were licenced per device, Office 365 is licenced by end user, allowing the user to access their products and do their work on a multitude of devices.

Figure 1.

Microsoft offers a wide array of SKU plans to fit the needs of many different user types and organizations. The plans available range in cost from £1.30 (or $2.00) per month up to £16.50 (or $22.00) per month. Choosing the right SKU can be a bewildering task, especially in a large organization with many diverse job roles. Opting for a cheaper licence will reduce costs upfront but increases the risk that the needs of some users will not be fulfilled and their ability to perform their role may be affected. Opting for one of the most expensive licences such as Office Enterprise E3 or E4 will remove this risk but you will be paying for functionality required only by a subset of your user base.

The optimal solution is to provide just the right functionality for each user, segmenting the required SKU plans based upon what users really do. 365iQ automatically recommends the right mix of SKUs across your organization.
Usage Analysis

Picking the right licence plan for the right user

365iQ uses an agent which is installed onto all required machines in a customer’s network. The agent gathers usage data on those machines and ties it to individual users. For accuracy, the data is gathered over a period of time. Figure 2 shows a sample of the type of information that 365iQ uses to determine the recommended SKU for a given user group.

<table>
<thead>
<tr>
<th>Document creator?</th>
<th>Desktop productivity tool</th>
<th>Offline worker?</th>
<th>Web document store?</th>
<th>Online presence or collaboration</th>
<th>Email?</th>
<th>Office 365 SKU</th>
<th>Other information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Office 365 Enterprise E1</td>
<td>Documents Devices Context</td>
</tr>
<tr>
<td>Read only</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Hosted email (Exchange online plan 1)</td>
<td>Documents Devices Context</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Office 365 Pro Plus</td>
<td>Documents Devices Context</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Office 365 Enterprise E3</td>
<td>Documents Devices Context</td>
</tr>
</tbody>
</table>

Figure 2.

The following is a non-exhaustive list of what 365iQ checks to determine the right fit for a given user:

- **Document creator** – 365iQ analyses whether a user creates content or only accesses the content for viewing purposes
- **Desktop productivity tool** – Does the user use productivity tools installed on their desktop?
- **Offline worker** – Does the user work when disconnected from the internet?
- **Web Document Store** - Does the user access documents held in an online store?
- **Online presence or collaboration** – Does the user use, for example, Lync or SharePoint
- **Email** - Does the user use an email client and what is that email client?

These criteria, along with others, are combined together to determine the recommended set of SKUs for the customer’s organization. The resulting chart is from real customer data.
Figure 3 shows the recommended SKUs across a sample organization of ~2,500 users. The blue bars to the right of “Total Annual Spend” show the SKU split and associated yearly cost for each SKU / licence plan. “Total Annual Spend” shows what the total combined licensing cost would be if all recommended SKUs were purchased\(^1\). The red box shows what the additional cost would be to opt for Enterprise E3 across the whole estate.

The optimal price point is the point at which the risks of affecting user productivity by not meeting their needs is minimised and total licence spend is also minimised.

Note as well the box showing online only users, an indication of how many users in this organization still need to be able to use productivity tools offline.

\(^1\) Representative cost based on Microsoft list price. Does not take into account volume or industry discounts. Consult your Microsoft reseller for accurate pricing
Further cost savings

As well as determining the correct licence suite for Office 365, 365iQ reports on the usage of other productivity applications on the estate.

Figure 4.

Figure 4 shows a sample of the productivity applications used on a sample customer estate. It shows the number of times these applications have been used over a period of time. Usage is an essential measure because it determines when applications have actually been executed rather than a simple inventory scan which shows only the applications which are installed across the estate.

In this example, five application suites / products have been found. Libre Office, Microsoft Works and Open Office could be replaced by Office 365 tools to simplify the application portfolio on the sample estate. This will likely reduce support costs due to application incompatibilities.

365iQ also analyses usage to determine the functionality required from a given application. For example, a large proportion of Adobe Acrobat Pro users on this estate were using it only for the print-to-pdf function. This functionality is now available in all Office products, meaning that the number of Acrobat Pro licences could be reduced to achieve further cost savings.
Implementation Tasks and Challenges

How 365iQ reduces risk of project failure

In order to plan migration of your organization's productivity suite to Office 365, data about the documents and associated file types accessed by a user is collected by 365iQ, alongside physical data about the devices they use. Contextual data is collected, such as the type of network connection that is made (through VPN, off-company network, home network).

All of this is combined to provide an accurate picture of the migratory tasks which will be required, allowing for efficient planning and significantly reducing the risk of project failure.

Microsoft has a minimum set of system requirements for support of Office 365 such as operating system version and browser version. To effectively plan migration and implementation, you should understand which devices are already up to specification. For those devices which are not, you should ascertain what upgrades will be required to understand estimated time to complete these upgrades.

As Office 365 is primarily an online suite, content must be stored either in SkyDrive or SharePoint online. Consequently, you should analyse where content is accessed today. Crucially, you should understand the usage of that content rather than looking at static stores where much of the data could be redundant. Are there locations being accessed, such as cloud storage and / or USB devices which are unauthorised for use? 365iQ data analytics provide this essential information.

For those users who utilise add-ons or macros in their content such as spreadsheets, there may be additional tasks required to convert this content to a format which is native to Office 365. Some add-ons may need to be tested for compatibility.

Figure 5.

Figure 5 chart shows a sample of customer data returned by 365iQ, outlining the devices used and which operating system is running on the devices.

Microsoft will end support for Windows XP in April 2014. From this point on Office 365 will also not support XP. In this instance, we can see that the customer has a large number of devices which will need to be upgraded.
Additionally, we see the browser versions which are installed on the various devices and those versions which will need to be upgraded to support the 365 web-based Office applications.

<table>
<thead>
<tr>
<th>Browser</th>
<th>User Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Firefox</td>
<td>3</td>
</tr>
<tr>
<td>19.0</td>
<td>2</td>
</tr>
<tr>
<td>2.0</td>
<td>1</td>
</tr>
<tr>
<td>Google Chrome</td>
<td>3</td>
</tr>
<tr>
<td>25.0</td>
<td>1</td>
</tr>
<tr>
<td>26.0</td>
<td>2</td>
</tr>
<tr>
<td>Internet Explorer</td>
<td>2,064</td>
</tr>
<tr>
<td>8.00</td>
<td>1,852</td>
</tr>
<tr>
<td>9.00</td>
<td>204</td>
</tr>
<tr>
<td>11.00</td>
<td>520</td>
</tr>
</tbody>
</table>

Figure 6.

This chart shows content which has been accessed on the customer’s environment and the number of accesses over a period of time. This can be differentiated from content and locations which are stored but no longer accessed. All locations can be determined, from local store, file share, online share and USB device. Where drives are mapped, the physical path is also returned. This information allows you to prioritise migration based upon where most documents are accessed from. It also clarifies the complexity of the task based on the location and store type.

For each location, the data is split out by file type and the default application which accesses the file. For example Word, Adobe Reader, Excel and Access. This again determines the complexity of the migratory task. Word documents can easily be moved. Access database files may require conversion before uploading to an online store or an alternative file format may be appropriate for the data which is being accessed in those files.

Figure 7.
Summary

It is crucial to determine the migration challenges posed by a move to Office 365 as early in the process as possible. This allows you or your service partner to identify the users who are ready to move to Office 365 immediately or require minimal work to be ready. Discounting these users early in the process allows you to concentrate on those users who may require more complex migrations before an upgrade is possible.

Where macro-enabled files are identified, they will need to be tested for any potential issues, especially when they are moved. Many macros link to other files so these links will need to be updated and tested for completeness.

365iQ will allow you to reduce the licence cost of your Office 365 adoption, reduce the operational cost of implementation and risk of failure. It allows you to understand the steps required to migrate all users and their relevant data successfully to Office 365. It also determines unnecessary and potentially costly applications eligible for removal.

Once you are up and running with 365iQ, information is provided to you for download on a fortnightly basis or a period agreed at the point of purchase.

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Get a free 30 day trial of 365iQ
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Centrix Software is a workspace management expert, providing user applications, data, configuration and platform to an end-point device in response to user-driven demands, including BYOD and self-service. Its usage analytics engine, WorkSpace iQ, enables workspace management decisions, while its workspace aggregator, WorkSpace Universal, provides the orchestration needed to support user choice and experience for cloud, physical and virtual applications, on any device while enabling IT to innovate and manage within a secure corporate environment.

Founded as a consultancy in 1997, Centrix Software’s in-depth usage analytics and aggregation solutions have driven optimized workspace management across leading organizations; saving millions in IT costs across banking and securities, insurance, telecommunications, retail, manufacturing, pharmaceutical, energy and utilities, and the public sector.

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