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Getting Your Office 365 Set Up Right

A CIO's Perspective on Information Governance

Presented 9/18/2019 at ARMA NOVA & NCC-AIIM Combined Meeting

Kevin Parker, CIP, INFO, ECM[m], ERM[m], BPM[m], SharePoint[m], Capture[p]
CEO & Principal Information Scientist at Kwestix

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How NOT to Deploy Office 365

Avoid these mistakes!

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10 Ways to Fail at Office 365

1. Buy licenses and get started!
2. Do a little research, buy licenses, and get started.
3. Let each individual decide what they need and manage it.
4. Let each business unit decide what they need and manage it.
5. Let IT decide what everyone needs and manage everything.
6. Don't worry about ROT cleanup or data migration (just start fresh).
7. Let users configure Teams and SharePoint sites as needed.
8. Restrict users from creating anything.
9. Let users integrate all the 3rd party apps they want.
10. Don't let users integrate any 3rd party apps.

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Microsoft's "Plan for Office 365" (Hint: This is too basic!)

1. Choose your plan
2. Decide on a domain name, if you don't already have one
3. Schedule when you are going to move your existing email and contacts to Office 365
4. Identify which files you want to store in the cloud
5. Assign roles
6. Get the word out

Source: https://support.office.com/en-us/article/plan-for-office-365-e913cb41-2bea-4cfa-b670-b6b9fce09625

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What's in Office 365 Today*

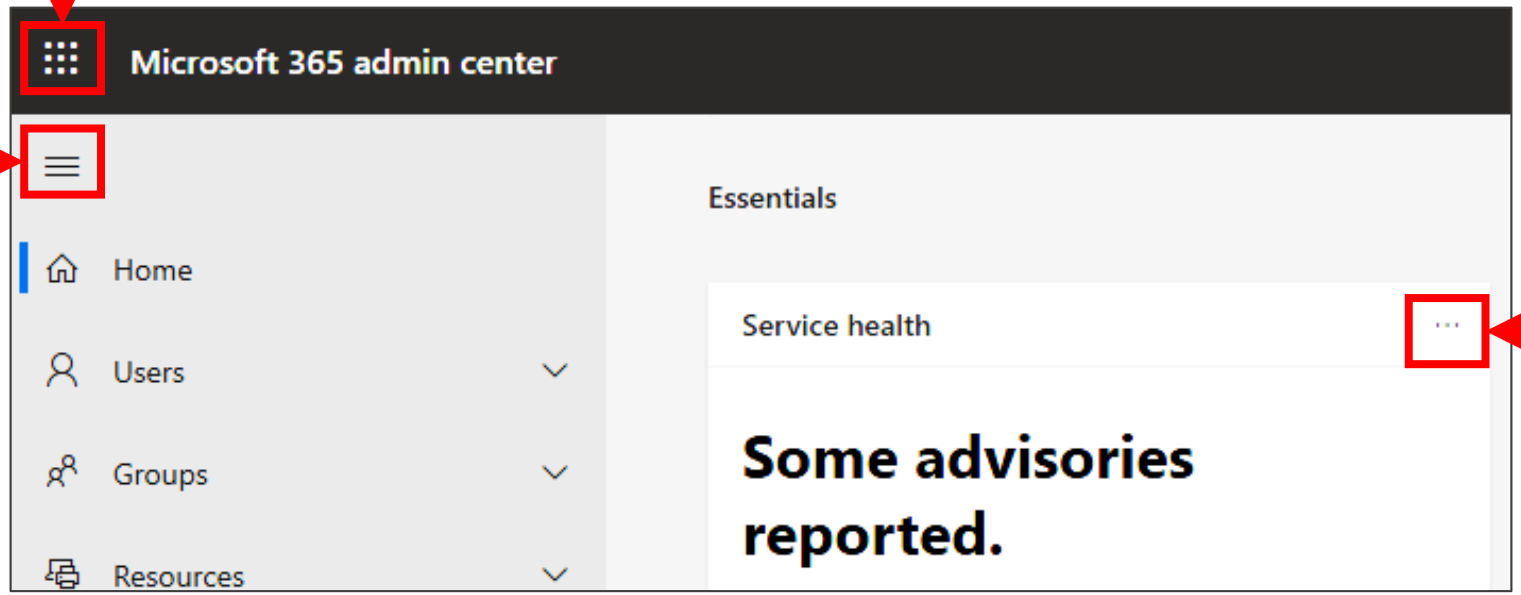
*As of September 2019…

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First: Menu Lingo Intro

Waffle, a.k.a. App Launcher

Hamburger, usually used for expanding and collapsing a navigation menu



Ellipsis, often used for hiding extra actions or options

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Office 365 Business & Enterprise Subscriptions (September 2019)

Office 365 Business

$8.25 user/month
(annual commitment)

Buy now

Best for businesses that need Office apps plus cloud file storage and sharing on PC, Mac, or mobile. Business email not included.

Office apps included

Outlook, Word, Excel, PowerPoint, Access (PC only)

Services included

OneDrive

Office 365 Business Premium

$12.50 user/month
(annual commitment)

Buy now

Best for businesses that need business email, Office apps, and other business services on PC, Mac, or mobile.

Office apps included

Outlook, Word, Excel, PowerPoint, Access (PC only)

Services included

Exchange, OneDrive, SharePoint, Teams

Office 365 Business Essentials

$5.00 user/month
(annual commitment)

Buy now

Best for businesses that need business email and other business services on PC, Mac, or mobile. Desktop versions of Office apps not included.

Office apps included

(Web and mobile versions only) [3]

Services included

Exchange, OneDrive, SharePoint, Teams

Office 365 ProPlus

$12.00 user/month
(annual commitment)

Buy now

Learn more >

Office applications plus cloud file-storage and sharing. Business email not included.

Office applications included

Outlook, Word, Excel, PowerPoint, Access (PC only), Publisher (PC only)

Services included

OneDrive

Office 365 E1

$8.00 user/month
(annual commitment)

Buy now

Learn more >

Business services—email, file storage and sharing, Office Online, meetings and IM, and more. Office applications not included.

Office applications included

(Not included)

Services included

Exchange, OneDrive, SharePoint, Teams, Yammer, Stream

Office 365 E3

$20.00 user/month
(annual commitment)

Buy now

Try for free >

Learn more >

All the features of ProPlus and Office 365 E1 plus security and compliance tools, such as legal hold, data loss prevention, and more.

Office applications included

Outlook, Word, Excel, PowerPoint, Access (PC only), Publisher (PC only)

Services included

Exchange, OneDrive, SharePoint, Teams, Yammer, Stream

Office 365 E5

$35.00 user/month
(annual commitment)

Buy now

Try for free >

Contact sales >

Learn more >

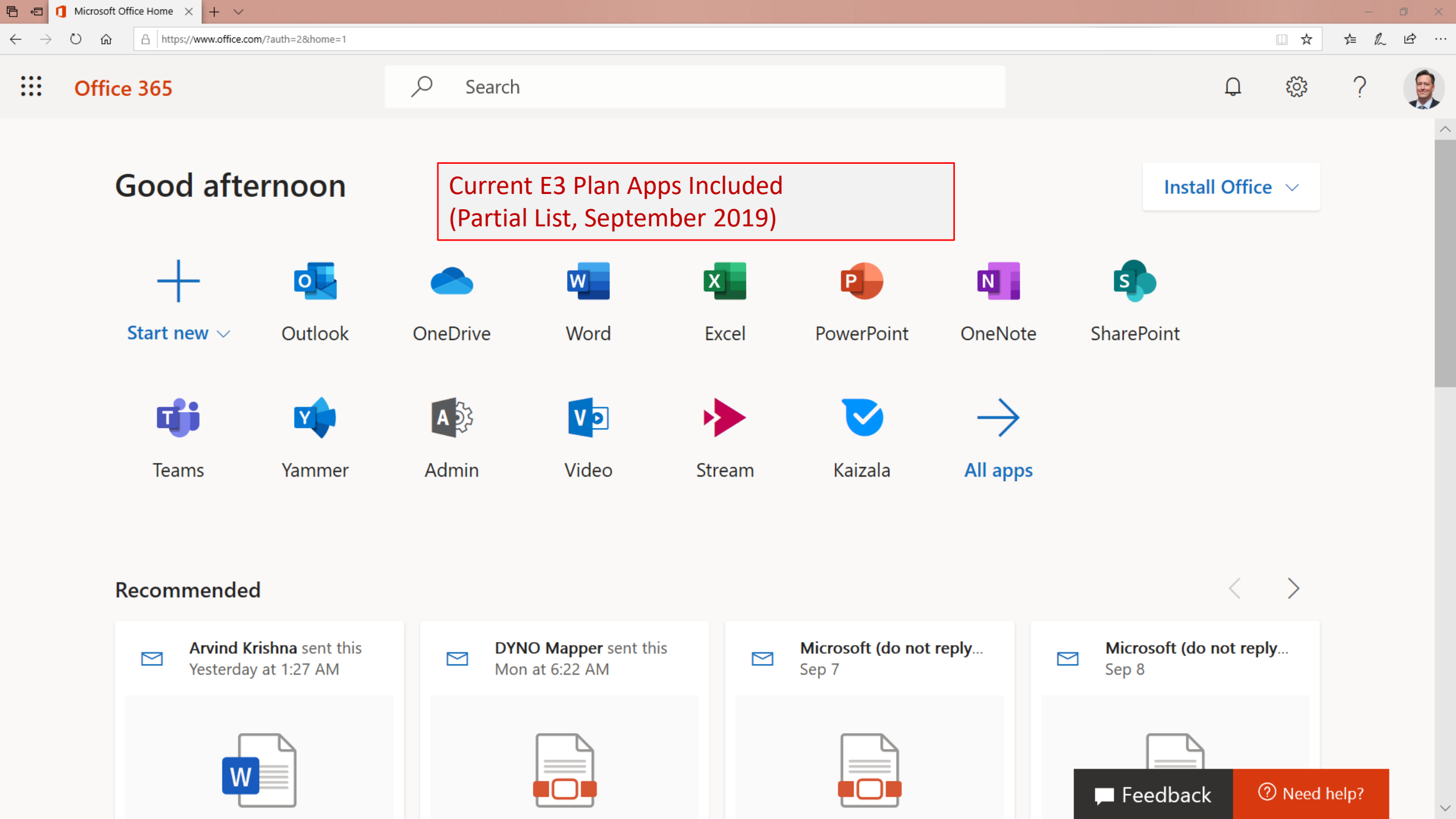
All the features of Office 365 E3 plus advanced security, analytics, and voice capabilities.

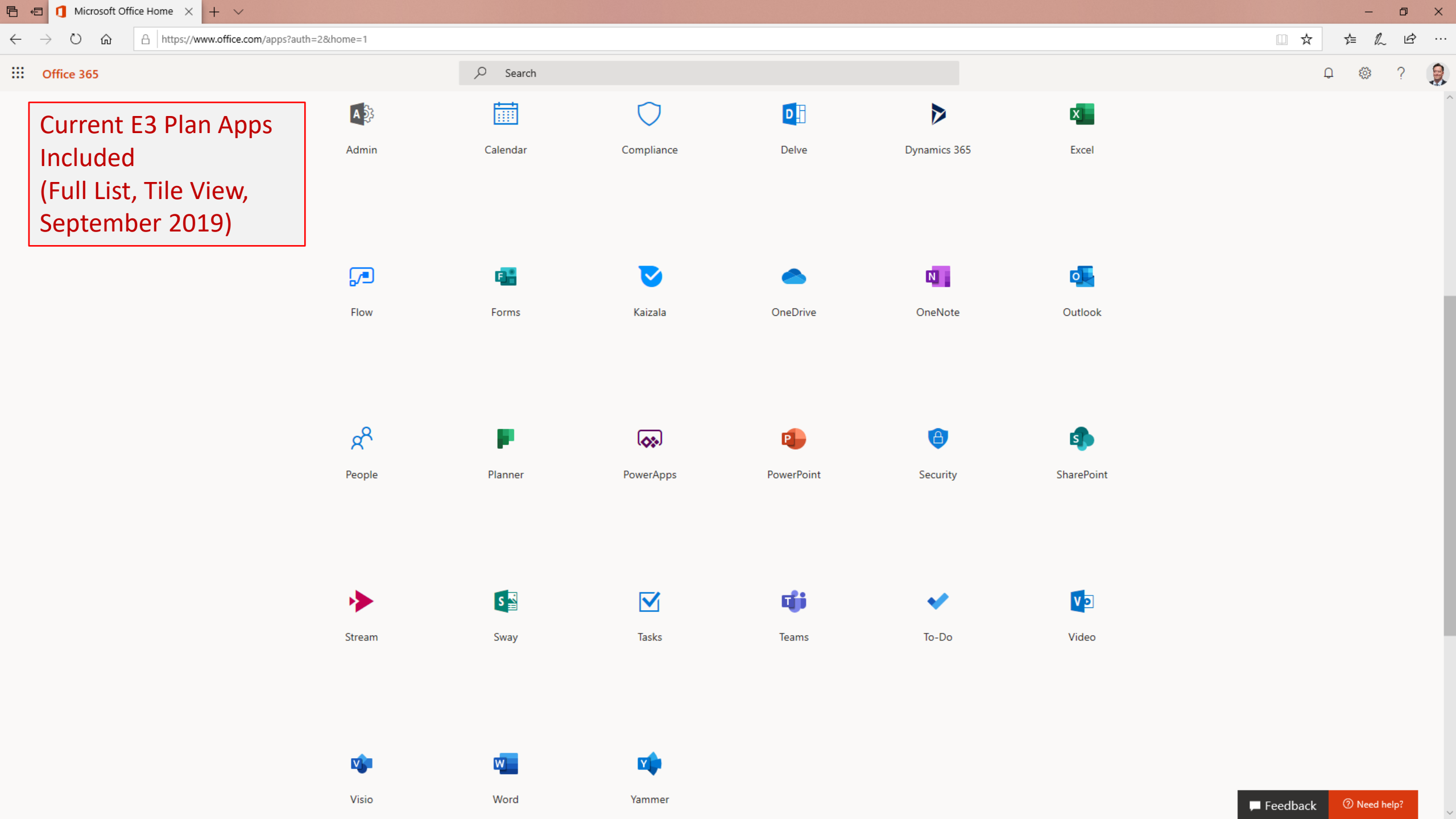
Office applications included

Outlook, Word, Excel, PowerPoint, Access (PC only), Publisher (PC only)

Services included

Exchange, OneDrive, SharePoint, Teams, Yammer, Power BI, Stream


Microsoft Office Home
https://www.office.com/?auth=2&home=1
Office 365
Search
Good afternoon
Current E3 Plan Apps Included
(Partial List, September 2019)
Install Office
Start new
Outlook
OneDrive
Word
Excel
PowerPoint
OneNote
SharePoint
Teams
Yammer
Admin
Video
Stream
Kaizala
All apps
Recommended
Arvind Krishna sent this
Yesterday at 1:27 AM
DYNO Mapper sent this
Mon at 6:22 AM
Microsoft (do not reply...
Sep 7
Microsoft (do not reply...
Sep 8
Feedback
Need help?


Microsoft Office Home
https://www.office.com/apps?auth=2&home=1
Office 365
Search
Current E3 Plan Apps Included
(Full List, Tile View, September 2019)
Admin
Calendar
Compliance
Delve
Dynamics 365
Excel
Flow
Forms
Kaizala
OneDrive
OneNote
Outlook
People
Planner
PowerApps
PowerPoint
Security
SharePoint
Stream
Sway
Tasks
Teams
To-Do
Video
Visio
Word
Yammer
Feedback
Need help?

Microsoft Office Home

https://www.office.com/apps?auth=2&home=1

Office 365

Search

Current E3 Plan Apps (Page 1 of 5, September 2019)

Admin
Your admin web portal—for managing people accounts and settings for each subscription.

Calendar
Schedule and share meeting and event times, and automatically get reminders.

Learn more

Compliance
Meet your organization's legal, regulatory, and technical standards for content security and data use.

Delve
Get personal insights and relevant information based on who you work with and the content you work on.

Learn more

Dynamics 365
Break down the silos between your business processes and applications with Microsoft Dynamics 365.

Learn more

Excel
Do more with the tool you already know. Discover and connect to data, model and analyze it, and visualize insights.

Learn more

Feedback

Need help?

Microsoft Office Home

https://www.office.com/apps?auth=2&home=1

Office 365

Search

Current E3 Plan Apps (Page 2 of 5, September 2019)

Flow
Create workflows between your apps, files, and data to automate time-consuming tasks so you can focus on what's next.

Forms
Create surveys, quizzes, and polls in minutes. Send them to anyone and easily see results in real time.

Learn more

Kaizala

OneDrive
Store your files in one place, share them with others, and get to them from any device connected to the Internet.

Learn more

OneNote
Capture notes by typing, drawing, or writing. OneNote lets you organize and reuse your notes across all of your devices.

Learn more

Outlook
Use business-class email through a rich and familiar Outlook experience you can access from your desktop or a web browser.

Learn more

People

Feedback

Need help?

Microsoft Office Home

https://www.office.com/apps?auth=2&home=1

Office 365

Search

Current E3 Plan Apps (Page 3 of 5, September 2019)

People
Organize your contact info for all your friends, family, colleagues, and acquaintances in one place. It's faster than ever to keep in touch.

Planner
Create new plans, organize and assign tasks, share files, chat about what you're working on, and get progress updates with Planner.

Learn more →

PowerApps
Build mobile and web apps with the data your organization already uses.

Learn more →

PowerPoint
Take your presentation to the next level. Design like a professional.

Learn more →

Security

SharePoint
Share and manage content, knowledge, and applications to empower teamwork, quickly find information, and seamlessly collaborate across the organization.

Learn more →

Stream
Share videos of classes, meetings, presentations, training sessions, or other videos with people in your company or school.

Learn more →

Feedback

Need help?

Microsoft Office Home

https://www.office.com/apps?auth=2&home=1

Office 365

Search

Current E3 Plan Apps (Page 4 of 5, September 2019)

Sway
Create and share engaging interactive reports, presentations, personal stories, and more. Sway does the design work for you.

Tasks
Create and manage tasks in Outlook.

Learn more →

Teams
The customizable chat-based team workspace in Office 365.

Learn more →

To-Do
Manage, prioritize, and complete the most important things you need to achieve every day.

Learn more →

Video
Share videos of classes, meetings, presentations, training sessions, or other videos with people in your company or school.

Learn more →

Visio
Simplify and communicate complex information visually with data-linked diagrams.

Learn more →

Word
Bring out your best writing. Going from a blank page to a beautiful document is easier than ever.

Learn more →

Feedback

Need help?

Microsoft Office Home

https://www.office.com/apps?auth=2&home=1

Office 365

Search

Yammer

Connect to the right people, share information across teams, and organize around projects with coworkers or classmates.

Current E3 Plan Apps (Page 5 of 5, September 2019)

Your company

iOS Accounts

Jumpto365

Feedback

Need help?

Microsoft | AppSource Apps Consulting Services

Search Microsoft AppSource

Sell Blog Kevin

AppSource is an app store for Office 365.

Products

Web Apps

Add-Ins

Dynamics 365

Office 365 >

- Excel
- OneNote
- Outlook
- PowerPoint
- Project
- SharePoint
- Teams
- Word

Power BI apps

Power BI visuals

Dynamics NAV

Categories

- Analytics
- Collaboration
- Customer service
- Finance
- Human resources
- IT + administration
- Marketing
- Operations + supply ...
- Productivity
- Sales

Industries

- Agriculture
- Education
- Distribution
- Financial services
- Government
- Health
- Manufacturing
- Professional services

Trials: All | Pricing Model: All | Ratings: All

Office 365 ✖ Add-Ins ✖

Best apps of the year for Office 365

Saketa Employee Onboarding
Get it now
By Saketa.com
SharePoint
Great Onboarding Experience Starts Here
(3)
Additional purchase may be required

Pickit | Make impactful presentations in minutes
Get it now
By Pickit
OneNote | PowerPoint | Word
Unlimited access to licensed photos, clipart and your company's images in PowerPoint.
(491)
Additional purchase may be required

Decisions Meeting Secretary
Get it now
By Decisions
Outlook
Plan, organize and run successful meetings, all within Office 365
(43)
Additional purchase may be required

officeatwork | Wizard
Get it now
By officeatwork 365
Word
A simple and effective way to build personalized, brand and legal compliant documents.
(25)
Additional purchase may be required

Hyperfish
By Hyperfish
Web apps
Hyperfish brings your company directory to life by ensuring profile information is accurate
Contact me

Editor's Pick for Office 365

XING
Get it now
By XING SE - Deutschland
Outlook
The add-in from XING gives you instant access to the XING profile details of your Outlook contacts.
(70)
Free

officeatwork | Wizard
Get it now
By officeatwork 365
Word
A simple and effective way to build personalized, brand and legal compliant documents.
(25)
Additional purchase may be required

Nintex Workflow for Office 365
Get it now
By Nintex USA LLC.
SharePoint
Easily automate and optimize any business process in Office 365.
(34)
Additional purchase may be required

SideKick 365 xRM Ultimate
Free trial
By SkyLite Systems
SharePoint
Sales and Opportunity Maximizer
(14)
$19.99/month

Salesforce
Get it now
By salesforce.com
Outlook
Boost productivity by bringing the power of the Salesforce Platform to Outlook.
(2346)
Additional purchase may be required

Additional Services for Purchase
(Page 1 of 9, September 2019)

- Home
- Users
- Groups
- Billing
  - Purchase services
  - Products & services
  - Licenses
  - Bills & payments
  - Billing accounts
  - Payment methods
  - Billing notifications
- Customize navigation
- Show all

Purchase services

Search

Select up to three products for a detailed comparison.

Product 1 | Product 2 | Product 3 | Compare products

Microsoft 365

Microsoft 365 combines Office 365, Windows 10, and Enterprise Mobility + Security together for your organization. Today's modern workspace allows people to meet, collaborate, and stay connected across boundaries. Microsoft 365 supports teamwork, connecting services like Microsoft Teams, SharePoint, and Yammer and providing a hub for collaboration.

Microsoft 365 Business

An integrated product for SMBs to access productivity tools, manage their productivity platform, and

Starting at
$20.00 user/month

Microsoft 365 E3

Office 365 E3, Enterprise Mobility + Security E3, and Windows 10 Enterprise E3. This per-user

Starting at
$32.00 user/month

Microsoft 365 E5

Office 365 E5, Enterprise Mobility + Security E5, and Window 10 Enterprise E5. This per-user

Starting at
$57.00 user/month

Microsoft 365 E5 without Audio Conferencing

Office 365 E5 without Audio Conferencing, Enterprise Mobility + Security E5, and Window 10

Starting at
$57.00 user/month

Other categories that might interest you

Office apps and services
Business apps
Collaboration and communication
Dynamics 365
Security and identity
Power BI
Windows
Other services
Add-ons

Need help? | Give Feedback

Home
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Additional Services for Purchase
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Office apps and services

Office empowers your employees to get work done wherever they are. By combining best-in-class apps like Excel and Outlook with powerful cloud services like OneDrive and Microsoft Teams, Office 365 lets anyone create and share anywhere on any device.

Office 365 Business Premium (Month to Month)
The Office suite for PC and Mac with apps for tablets and phones, plus email, instant messaging, HD
Starting at
$15.00 user/month

Office 365 Business Premium
The Office suite for PC and Mac with apps for tablets and phones, plus email, instant messaging, HD
Starting at
$12.50 user/month

Office 365 Business (Month to Month)
The Office suite for PC and Mac with apps for tablets and phones, plus 1 TB personal file storage and
Starting at
$10.00 user/month

Office 365 Business
The Office suite for PC and Mac with apps for tablets and phones, plus 1 TB personal file storage and
Starting at
$8.25 user/month

Office 365 Business Essentials (Month to Month)
Online versions of Office with email, instant messaging, HD video conferencing, plus 1 TB personal
Starting at
$6.00 user/month

Office 365 Business Essentials
Online versions of Office with email, instant messaging, HD video conferencing, plus 1 TB personal
Starting at
$5.00 user/month

Office 365 E3
The Office suite for PC and Mac with apps for tablets and phones, plus email, instant messaging, HD
Starting at
$20.00 user/month

Office 365 E5
The Office suite, plus email, instant messaging, HD video conferencing, 1 TB personal file storage and
Starting at
$35.00 user/month

Office 365 ProPlus
The premium Office suite for organizations - including Word, Excel, PowerPoint, Outlook,
Starting at
$12.00 user/month

Office 365 F1
For people in your organization without a dedicated PC that need occasional access to web email,
Starting at
$4.00 user/month

Office 365 E1
The online versions of Office with email, instant messaging, HD video conferencing, plus 1 TB personal
Starting at
$8.00 user/month

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Dynamics 365

Unify CRM and ERP capabilities and break down data silos with Dynamics 365 - modern, intelligent cloud applications that help move your business forward. End-to-end applications for Sales, Service, Finance and Operations, Talent, and Marketing that work great on their own and even better together.

Dynamics 365 Customer Engagement Plan
User subscription that includes Dynamics 365 for Sales, Customer Service, Field Service, Project
Starting at
$115.00 user/month

Dynamics 365 Customer Service Insights
User subscription that includes Dynamics 365 Customer Service Insights
Starting at
$75.00 user/month

Dynamics 365 for Marketing User License
Requires a Marketing App tenant license and can be assigned for granting access to users without a
Free

Dynamics 365 for Customer Service Enterprise
User subscription that includes Dynamics 365 for Customer Service, Enterprise edition.
Starting at
$95.00 user/month

Dynamics 365 for Customer Service Enterprise Device
User subscription that includes Dynamics 365 for Customer Service, Enterprise edition.
Starting at
$145.00 user/month

Dynamics 365 for Customer Service Professional
User subscription that includes Dynamics 365 for Customer Service Professional
Starting at
$50.00 user/month

Dynamics 365 for Field Service
User subscription that includes Dynamics 365 for Field Service, Enterprise edition.
Starting at
$95.00 user/month

Dynamics 365 for Project Service Automation
User subscription that includes Dynamics 365 for Project Service Automation, Enterprise edition.
Starting at
$95.00 user/month

Dynamics 365 for Sales Enterprise
User subscription that includes Dynamics 365 for Sales, Enterprise edition.
Starting at
$95.00 user/month

Dynamics 365 for Sales Enterprise (Device)
User subscription that includes Dynamics 365 for Sales, Enterprise edition.
Starting at
$145.00 user/month

Dynamics 365 for Sales Professional
User subscription that includes Dynamics 365 for Sales Professional
Starting at

Dynamics 365 Sales Insights
User subscription that includes Dynamics 365 AI for Sales
Starting at

Dynamics 365 Team Members
User subscription that includes Team Members
Starting at

Dynamics 365 for Marketing
Subscription that includes Dynamics 365 for Marketing
Starting at

Dynamics 365 for Marketing Attach
Subscription that includes Dynamics 365 for Marketing
Starting at

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Business apps

Boost employee productivity with apps that power your organization. Build apps, automate processes and tasks, plan and track your projects, and create diagrams, organization charts, maps, and workflows - all to support your business.

Project Online Essentials
Collaborate on projects online, view and manage tasks, submit timesheets, and flag issues or risks.
Starting at
$7.00 user/month

Project Online Essentials (Month to Month)
Collaborate on projects online, view and manage tasks, submit timesheets, and flag issues or risks.
Starting at
$9.00 user/month

Project Online Professional
A complete online project management solution to help keep your projects, resources, and teams
Starting at
$30.00 user/month

Project Online Premium
A flexible solution for project portfolio management and everyday work. Includes the Project
Starting at
$55.00 user/month

Visio Online Plan 1
A lightweight web-based diagramming solution that gives users an opportunity to create,
Starting at
$6.00 user/month

Visio Online Plan 1
A lightweight web-based diagramming solution that gives users an opportunity to create,
Starting at
$5.00 user/month

Visio Online Plan 2
Makes it easier than ever for individuals and teams to create data-linked diagrams that simplify
Starting at
$15.00 user/month

Visio Online Plan 2
Makes it easier than ever for individuals and teams to create data-linked diagrams that simplify
Starting at
$18.00 user/month

Microsoft Kaizala Pro
Chat-based app that enables you to connect and get work done across your mobile-first network –
Starting at
$1.51 user/month

Microsoft Flow Plan 1
Create and collaborate on automated workflows for cloud and on-premises data with a
Starting at
$5.00 user/month

Microsoft Flow Plan 2
Create and collaborate on automated workflows for cloud and on-premises data. Includes
Starting at
$15.00 user/month

Microsoft PowerApps Plan 1
Create, share, and run business apps and workflows for cloud and on-premises data or the Microsoft
Starting at
$7.00 user/month

Microsoft PowerApps Plan 2
Create, share, and run business apps and workflows for cloud and on-premises data or the Microsoft
Starting at
$40.00 user/month

Microsoft Stream
Microsoft Stream is an enterprise video service that makes it easy to securely create, share and manage
Starting at
$5.00 user/month

Purchase services

Additional Services for Purchase
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Collaboration and communication

Collaborate and connect your organization with business class e-mail, professional online meetings, online and in-app file sharing and instant messaging.

Exchange Online (Plan 1)

Messaging, calendaring, and email archiving plan accessible from Outlook on PCs, the Web and

Starting at
$4.00 user/month

Exchange Online (Plan 2)

Best messaging and calendaring plan accessible from PCs, the Web and mobile devices with advanced

Starting at
$8.00 user/month

Exchange Online Kiosk

Basic messaging and calendaring plan with Web email and POP access.

Starting at
$2.00 user/month

Exchange Online Archiving for Exchange Server

A personal e-mail archive for users who have mailboxes on Exchange Server 2010 or later.

Starting at
$3.00 user/month

Common Area Phone

Enables the use of Common Area Phone devices with your Office 365 Phone System.

Starting at
$8.00 user/month

OneDrive for Business (Plan 1)

Convenient online companions to Microsoft Word, Excel, PowerPoint, and OneNote to do light editing of

Starting at
$5.00 user/month

OneDrive for Business (Plan 2)

Provides personal cloud storage, offline access and sharing along with convenient online companions

Starting at
$10.00 user/month

SharePoint Online (Plan 1)

Collaboration plan that enables users to share, manage and search for information and resources.

Starting at
$5.00 user/month

SharePoint Online (Plan 2)

Best collaboration plan with advanced capabilities for rich forms, enhanced data visualization,

Starting at
$10.00 user/month

Skype for Business Online (Plan 2)

Unified communications plan with advanced capabilities including enterprise Instant Messaging,

Starting at
$5.50 user/month

Yammer Enterprise Bridge Trial

Best-in-class enterprise social for company collaboration, knowledge exchange, and team efficiency.

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Power BI

Deliver insights throughout your organization with this suite of business analytics tools. Connect to hundreds of data sources, simplify data prep, and drive ad hoc analysis. Create reports and publish them for your organization to use on the web or on mobile devices.

Power BI (free)

A cloud-based business analytics service that enables anyone to visualize and analyze data with

Free

Power BI Pro

A cloud-based business analytics service that enables anyone to visualize and analyze data with

Starting at
$9.99 user/month

Power BI Premium EM3 (Month to Month)

Embed Power BI content in your custom application, powered by 4 virtual cores of dedicated capacity.

Starting at
$2,994.00 instance/month

Power BI Premium P1 (Month to Month)

Power BI capacity dedicated to your organization, unlocking unlimited content distribution and

Starting at
$5,994.00 instance/month

Power BI Premium P1

Power BI capacity dedicated to your organization, unlocking unlimited content distribution and

Starting at
$4,995.00 instance/month

Power BI Premium P2

Power BI capacity dedicated to your organization, unlocking unlimited content distribution and

Starting at
$9,995.00 instance/month

Power BI Premium P3

Power BI capacity dedicated to your organization, unlocking unlimited content distribution and

Starting at
$19,995.00 instance/month

Power BI Premium P4

Power BI capacity dedicated to your organization, unlocking unlimited content distribution and

Starting at
$39,995.00 instance/month

Power BI Premium P5

Power BI capacity dedicated to your organization, unlocking unlimited content distribution and

Starting at
$79,995.00 instance/month

Other categories that might interest you

Microsoft 365
Office apps and services
Business apps
Collaboration and communication
Dynamics 365
Security and identity
Windows
Other services
Add-ons

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Security and identity

Security comes standard in all Microsoft products and technologies. No matter the size of your organization, use these practical resources to get secure today and protect against threats in the future.

Enterprise Mobility + Security E3

Enterprise Mobility + Security E3 provides a convenient cost effective way for customers to

Starting at
$8.80 user/month

Enterprise Mobility + Security E5

Microsoft Enterprise Mobility + Security E5 is the most comprehensive cloud delivered

Starting at
$14.80 user/month

Azure Active Directory Premium P1

A robust set of capabilities to empower organizations with more demanding needs on identity and

Starting at
$6.00 user/month

Azure Active Directory Premium P2

Azure Active Directory Premium P2: A comprehensive cloud Identity and access management solution

Starting at
$9.00 user/month

Microsoft Intune

Microsoft Intune helps organizations provide their employees with access to

Starting at
$6.00 user/month

Microsoft Cloud App Security

A cross-platform cloud solution extending IT visibility, governance and control to the cloud

Starting at
$3.50 user/month

Azure Information Protection Premium P1

Helps classify, label and protect confidential documents and emails persistently. Access to information

Starting at
$2.00 user/month

Azure Information Protection Premium P2

Azure Information Protection Premium P2 helps you classify, label and protect confidential

Starting at
$5.00 user/month

Azure Advanced Threat Protection for Users

Azure Advanced Threat Protection is designed to help you protect your enterprise from advanced

Starting at
$5.50 user/month

Exchange Online Protection

Advanced anti-malware and anti-spam protection for email deployments.

Starting at
$1.00 user/month

Office 365 Advanced Threat Protection (Plan

Modern email protection techniques such as Safe Links and Safe Attachment, complementing

Trial

Additional Services for Purchase
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Other services

More services to support your organization.

Common Data Service File Capacity

Additional file capacity for Dynamics 365 Customer Engagement Apps, PowerApps and

Starting at
$2.00 addon/month

Common Data Service Log Capacity

Additional log data (audit / tracing) capacity for Dynamics 365 Customer Engagement Apps,

Starting at
$10.00 addon/month

Office 365 E3 Developer

Tools and an environment to build and test apps for the Office and SharePoint stores.

Starting at
$8.25 user/month

Dynamics 365 Customer Insights Trial

User subscription that includes Dynamics 365 AI for Customer Insights

Trial

Forms Pro Addl Responses

Each Forms Pro add-on provides access to 2K survey responses per month. A qualifying Office or

Starting at
$100.00 addon/month

Meeting Room

Enables Microsoft Teams for meeting rooms.

Starting at
$15.00 user/month

Microsoft Intune Device

Microsoft Intune Device helps organizations provide their employees with access to

Starting at
$2.00 user/month

Common Data Service Database Capacity

Additional relational database capacity for Dynamics 365 Customer Engagement Apps,

Starting at
$40.00 addon/month

Microsoft Forms Pro USL

User license for Forms Pro Add-On

Free

Z_DO NOT USE Windows 10 Enterprise E5 with

Windows 10 Enterprise E5 with WVD_EVD for Testing only

Trial

Other categories that might interest you

Microsoft 365
Collaboration and communication
Power BI
Office apps and services
Dynamics 365
Windows
Business apps
Security and identity
Add-ons

Additional Services for Purchase
(Page 9 of 9, September 2019)

Purchase services



Add-ons

Get even more value from the subscriptions you already have.

Office 365 Advanced Threat Protection (Plan

Provides rich insights on advanced threats, supports proactive defense against them, and integrates

Starting at
$5.00 user/month

Business Apps (free)

Includes Microsoft Bookings – business apps from Office 365 that'll help you run and grow your

Free

Microsoft Stream Plan 2 for Office 365 Add-On

Stream enables anyone to upload and share videos across their organization to improve

Starting at
$2.00 user/month

Microsoft Stream Storage Add-On (500 GB)

500GB of additional storage for your organization's Stream service.

Starting at
$100.00 addon/month

Microsoft 365 E5 Compliance

A set of intelligent information protection and compliance solutions to protect and govern

Starting at
$10.00 user/month

Microsoft 365 E5 Security

A complete set of threat protection solutions, leveraging cloud signal to detect and protect against

Starting at
$12.00 user/month

Audio Conferencing

Enables users to dial-in a number to join meetings, or dial-out to bring participants into the meeting.

Starting at
$4.00 user/month

Microsoft 365 E5 Security Trial

A complete set of threat protection solutions, leveraging cloud signal to detect and protect against

Trial

Office 365 Advanced Threat Protection (Plan

Provides rich insights on advanced threats, supports proactive defense against them, and integrates

Trial

Microsoft 365 E5 Compliance Trial

A set of intelligent information protection and compliance solutions to protect and govern

Trial

Skype for Business Plus CAL

PSTN calling and enterprise-grade voice features using Skype for Business servers on-premises or

Starting at
$2.00 instance/month

Office 365 Advanced Compliance

Office 365 Advanced Compliance brings together advanced data governance, advanced eDiscovery,

Starting at
$8.00 user/month

Phone System

For organizations that need call management capabilities (make, receive and transfer calls) in the

Starting at
$8.00 user/month

Office 365 Extra File Storage

Priced per gigabyte, Office 365 offers additional file storage options to support an

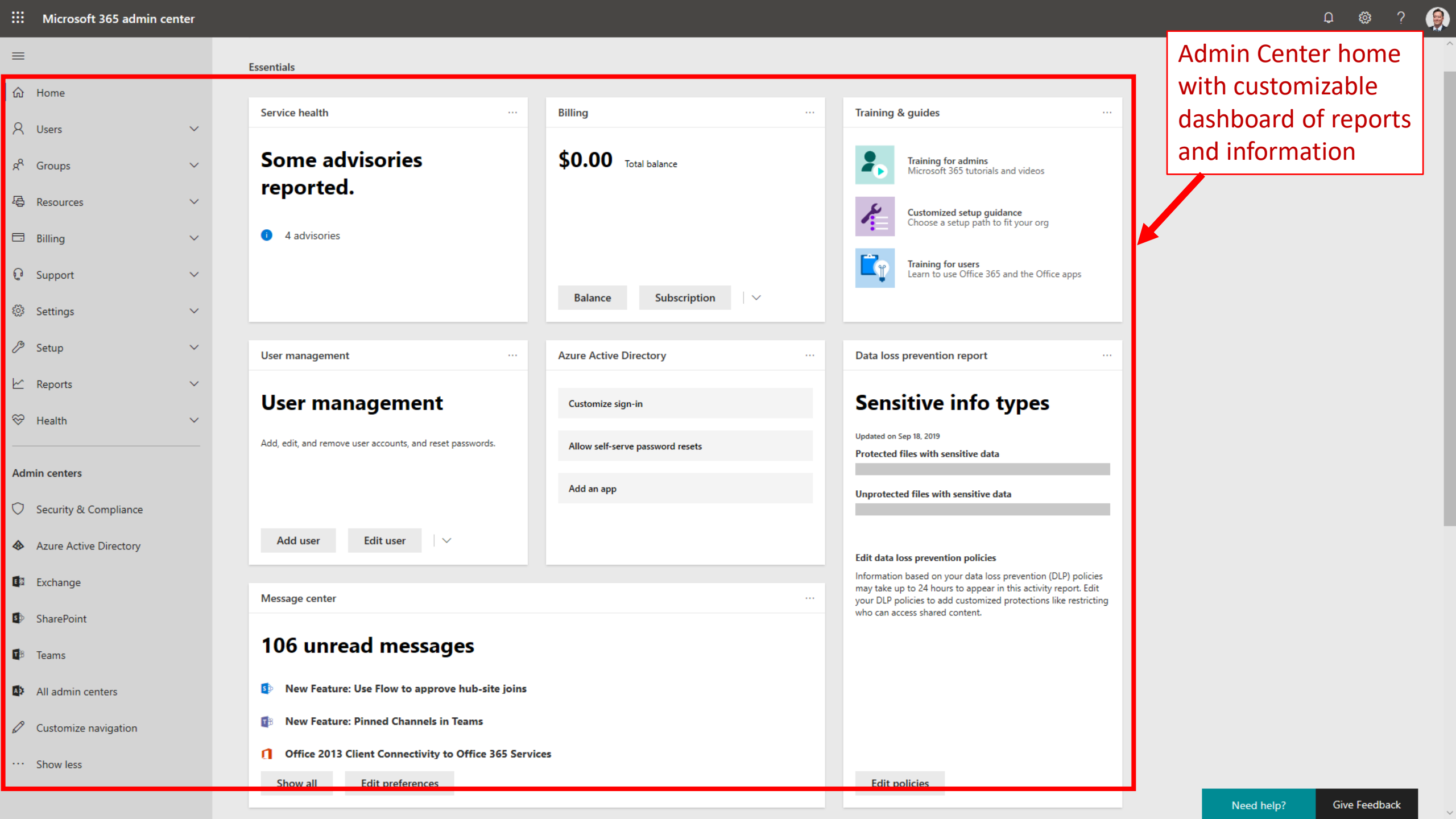
Starting at
$0.20 gigabyte/month

Office 365 Advanced Threat Protection (Plan

Modern email protection techniques such as Safe Links and Safe Attachment, complementing

Starting at
$2.00 user/mo

Home
Users
Groups
Billing
Purchase services
Products & services
Licenses
Bills & payments
Billing accounts
Payment methods
Billing notifications
Customize navigation
Show all


Microsoft 365 admin center
Admin Center home with customizable dashboard of reports and information
Essentials
Home
Users
Groups
Resources
Billing
Support
Settings
Setup
Reports
Health
Admin centers
Security & Compliance
Azure Active Directory
Exchange
SharePoint
Teams
All admin centers
Customize navigation
Show less
Service health
Some advisories reported.
4 advisories
Billing
$0.00 Total balance
Balance
Subscription
Training & guides
Training for admins
Microsoft 365 tutorials and videos
Customized setup guidance
Choose a setup path to fit your org
Training for users
Learn to use Office 365 and the Office apps
User management
User management
Add, edit, and remove user accounts, and reset passwords.
Add user
Edit user
Azure Active Directory
Customize sign-in
Allow self-serve password resets
Add an app
Data loss prevention report
Sensitive info types
Updated on Sep 18, 2019
Protected files with sensitive data
Unprotected files with sensitive data
Edit data loss prevention policies
Information based on your data loss prevention (DLP) policies may take up to 24 hours to appear in this activity report. Edit your DLP policies to add customized protections like restricting who can access shared content.
Edit policies
Message center
106 unread messages
New Feature: Use Flow to approve hub-site joins
New Feature: Pinned Channels in Teams
Office 2013 Client Connectivity to Office 365 Services
Show all
Edit preferences
Need help?
Give Feedback



Admin Centers available (with E3 subscription as of September 2019)

Support
Settings
Setup
Reports
Health

Admin centers

Security & Compliance
Azure Active Directory
Exchange
SharePoint
Teams
All admin centers
Customize navigation
Show less

Kwestix

All admin centers

Search

Name	Description
Azure Active Directory	Go deep with identity management. Enable multi-factor authentication, self-service password reset, and edit compan
Exchange	Manage advanced email settings, such as quarantine, encryption, and mail flow rules.
Flow	View activity and manage user licenses and data policies for Flow, the Microsoft app that automates workflows.
OneDrive	Control access and sharing settings, default storage, and allowed file types.
PowerApps	View activity and manage user licenses and data policies for PowerApps, which enables users to create business apps
SharePoint	Manage site collections, list and library permissions, file storage and sharing.
Teams	Configure messaging, conferencing, and external communication options for your users.
Yammer	Manage your Yammer network, set a usage policy, control external network settings, and enable features like translat

Information Governance & Cybersecurity Controls & Reports (Security & Compliance Dashboard)

The Security & Compliance Dashboard can be tailored to your needs.

Office 365 Security & Compliance

Home
Alerts
Permissions
Classification
Data loss prevention
Records management
Data governance
Supervision
Threat management
Mail flow
Data privacy
Search
eDiscovery
Reports
Service assurance

We're committed to helping on your GDPR journey

GDPR is all about protecting and enabling individuals' privacy rights inside the European Union (EU). Our tools can help you detect, classify, and secure this sensitive info across locations (like Exchange, OneDrive, and more) and can also help you quickly find and export content in response to data subject requests.

Go to the GDPR dashboard

Data governance

The tools on the data governance dashboard can help you manage the full content lifecycle from importing, storing, and classifying data at the beginning to retaining, monitoring, and then deleting it at the end.

Go to the data governance dashboard

Threat management

Cyberattacks are constantly evolving. Our threat management features help safeguard your organization against these attacks by providing insights and tools to help detect and respond to threats like phishing, malware, malicious links, and more.

- New ATP anti-phishing policy
- New spam policy
- View quarantine

Data governance

It's your data. You own it. So we've developed features that let you take charge of how and when it is stored, used, and retained or removed.

- Enable extra storage
- Import data into Office 365

Learn more about data management

Search for users

Search for users

Microsoft Secure Score

Total score: 48/507

This score reflects the collective security state of your identities, data, devices, apps, and infrastructure.

Updated 09/17/2019



Your score

Identity	22 / 223
Data	26 / 219
Device	0 / 45
Apps	0 / 20
Infrastructure	No data to show

Microsoft Secure Score

Recommended for you

Let users classify their own content

Let your users classify their content as Transitory, Work in Progress, or Business Record. Create three labels that they can apply to their content in Outlook, SharePoint, and OneDrive.

+ Get started

Learn how we protect your data

Use our Service Assurance features to stay informed on how Office 365 protects your data and helps you stay compliant with regulations that matter to you.

+ Get started with Service Assurance

+ More

Need help? Feedback

Getting it Set Up Right

Foundations and Phases of Work

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Defining Solution Success

Make it ***Useful***

Meet business needs with good architecture.

Make it ***Usable***

Design for usability and accessibility.

Get it ***Used***

Promote user adoption with communication, learning, and support.

Make it ***Sustainable***

Make the solutions simple, flexible, scalable, secure, and manageable to get the most value for the least ongoing costs.

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Solution Lifecycle & User Adoption

Strategy What are you trying to accomplish? What are the Critical Success Factors?

Architecture What apps and features should you use? How should you organize and structure things?

Governance How do you get people to use it in the ways you intend?

Implementation How do you build it out and get users started?

Operation How do you support users and drive adoption?

User Adoption

Security, Privacy, Management, Business Continuity, Retention, Compliance, etc.

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Some Governance Areas to Consider

Administration

- Policies for Subscriptions
- Managing Subscriptions
- Data Governance
- Records Management

Security Roles & Permissions

- User Accounts
- Roles
- Groups
- Permissions

Cybersecurity

- Authentication
- Roles & Policies
- External Sharing
- Compliance & Privacy
- Encryption & Rights Management

SharePoint

- Site Collections
- Site Architecture
- Metadata Management
- SharePoint Policies

Teams

- Teams Administration
- Establishing & Managing Teams
- Teams Policies

Other Apps

- Flow
- OneDrive for Business
- Teams Scheduling & Conferencing
- Microsoft 365 & Desktop Apps

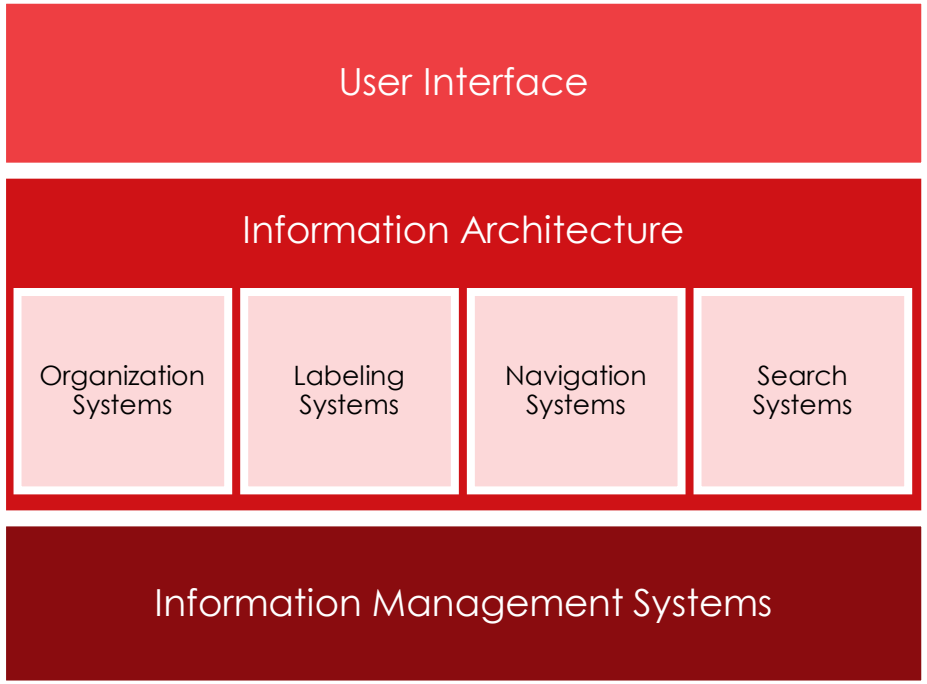
These are just a few of the areas to consider! Get help from experts who understand the whole picture.

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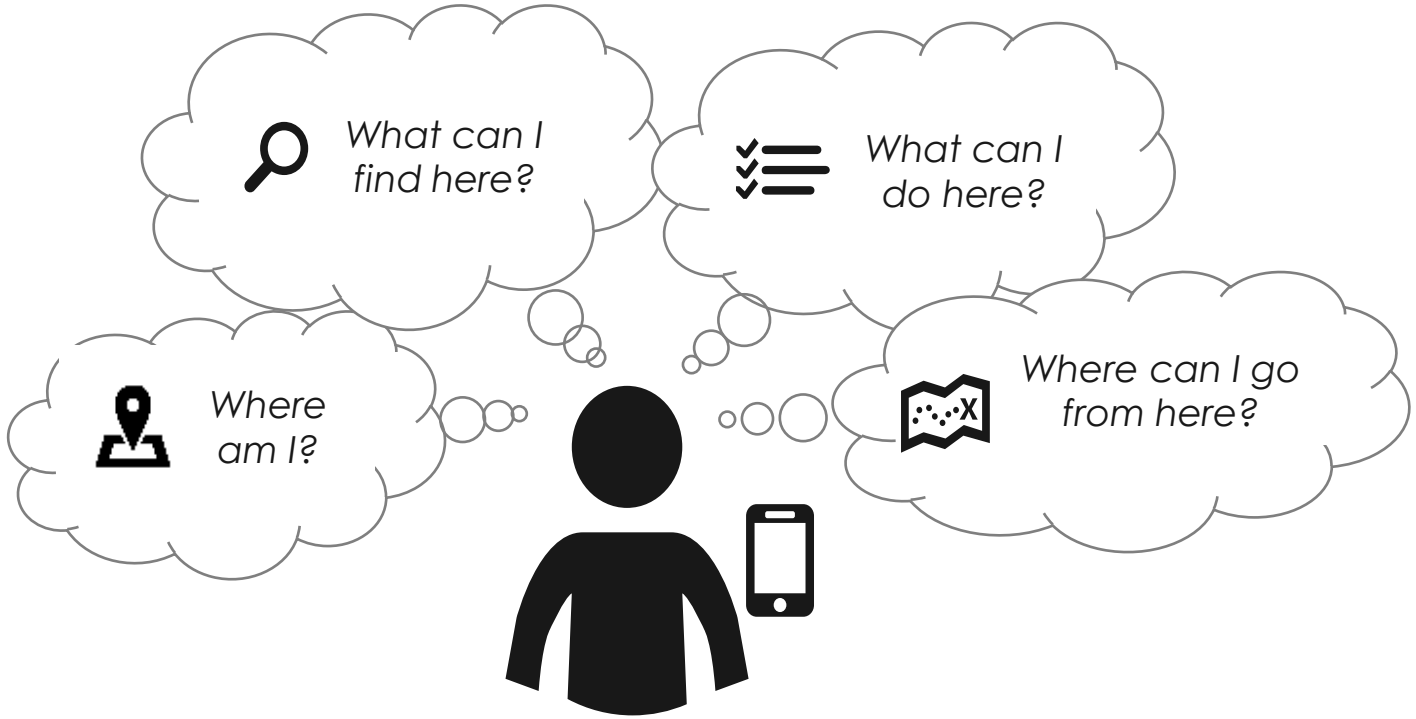
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Information Architecture

IA is the middleware between your UI and the technology:



IA helps users answer key questions:



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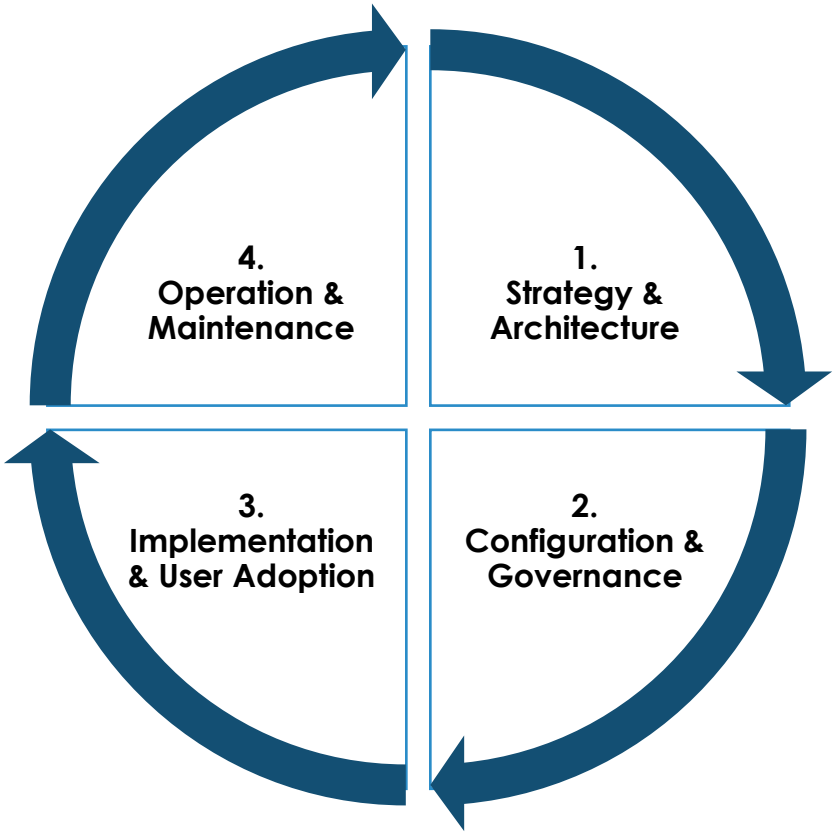
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Foundation & Solution Phases

Phase 1: Foundation

- Information Quick Assessment
- Solutions Strategy & Roadmap
- Information Architecture Blueprint
- Security Design & Configuration

Phase 2+: Solution Iterations



- Solution 1
- Solution 2
- Solution 3
- Solution *n*

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Phase 1: Foundation

Information Quick Assessment

- Review current information repositories and information architecture.
- Review current technology environment and security schemes.
- Assess current information maturity level.
- Identify specific business goals for information management and collaboration.

Solutions Strategy & Roadmap

- Identify relevant Office 365 tools and features for solution core.
- Design basic organizing schemes for tools, teams, processes, and security.
- Outline process for building and governing planned solutions on Office 365.
- Provide guidance on subscription licensing and potential savings.
- Create solutions roadmap.

Information Architecture Blueprint

- Design basic metadata model for collaboration and information management.
- Design basic site organization and labeling model.
- Design basic search strategy.
- Develop solutions and repositories map.

Security Design & Configuration

- Review current global security configuration, roles, and permissions.
- Review current site and tool permissions.
- Design manageable and scalable security model.
- Make necessary global security configuration changes.
- Provide guidance on governing the new security model going forward.

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Example Solution: Teams for Collaboration

1. Strategy & Architecture

- Review current Teams in place.
- Plan up to 10 teams (initial rollout).
- Decide what tabs and tools should be integrated.

2. Configuration & Governance

- Configure the planned teams.
- Document the teams to facilitate ongoing support and governance.
- Document a simple process for requesting new teams.

3. Implementation & User Adoption

- Integrate tools as planned for the teams.
- Create/migrate content or content placeholders for the planned teams.
- Provide a basic user guide for each of the teams.
- Provide communication guidance for the teams to facilitate user adoption.

4. Operation & Maintenance

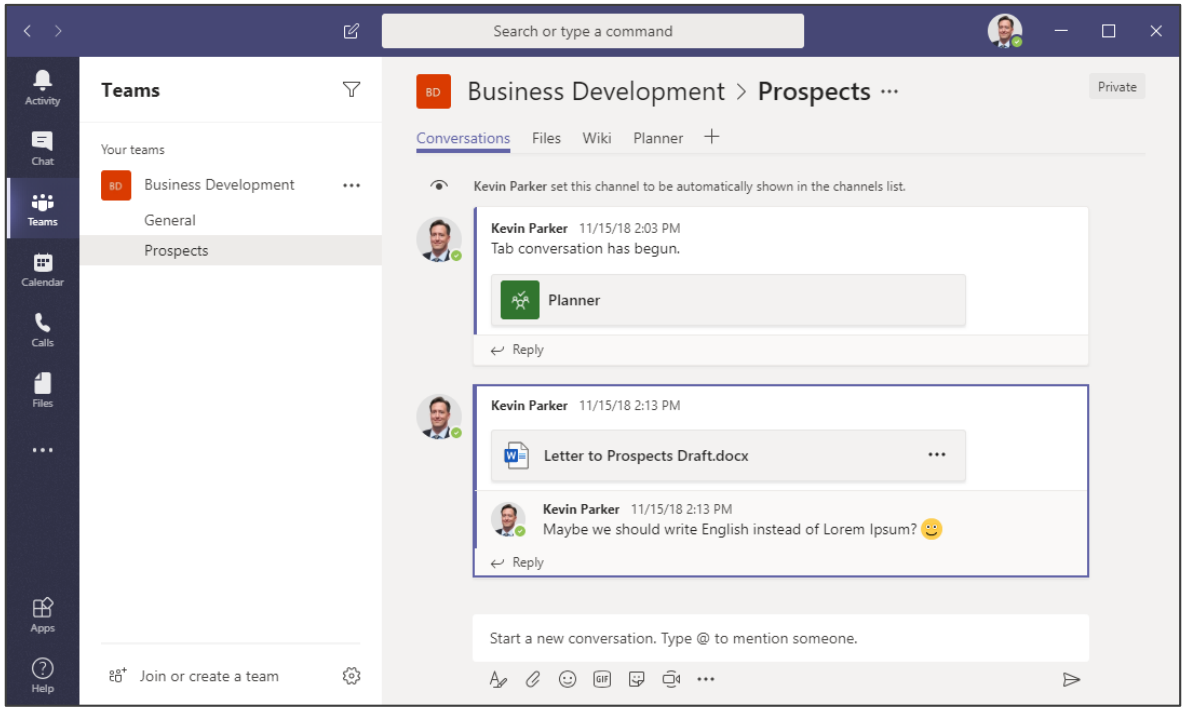
- Train a team leader on basic operation and maintenance of each team.
- Train IT staff on overall maintenance.



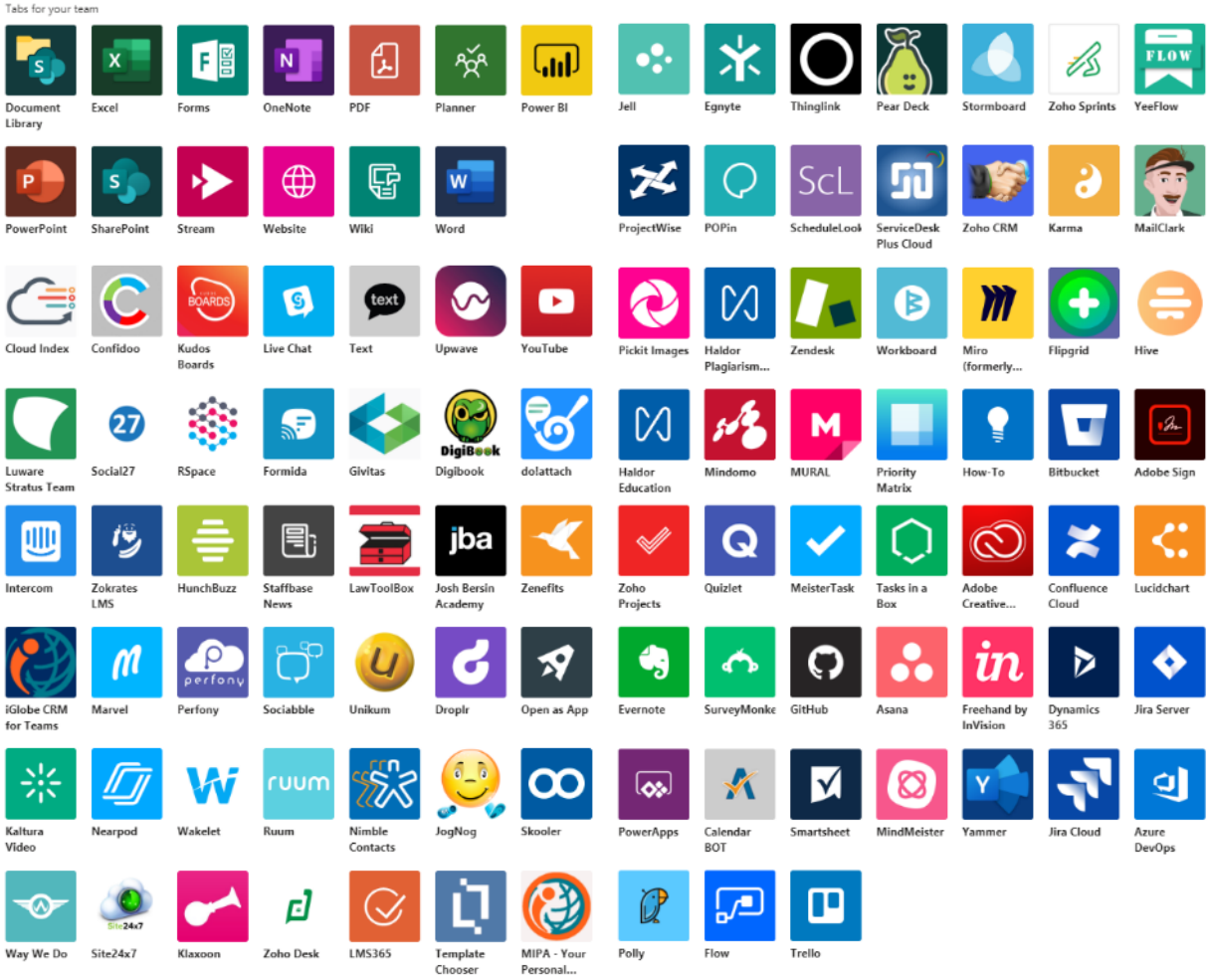
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Teams Tabs

Simple set of tabs:



Many more tabs can be added today:

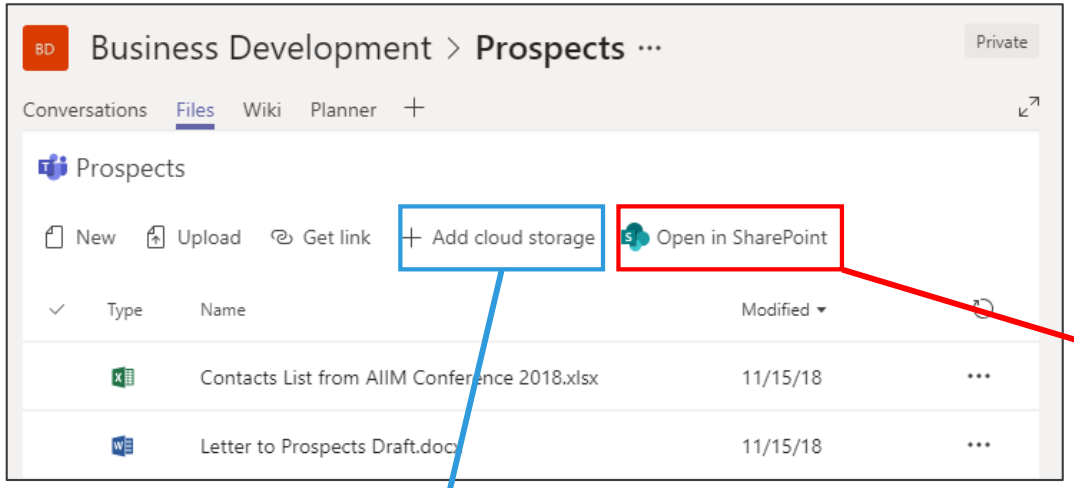


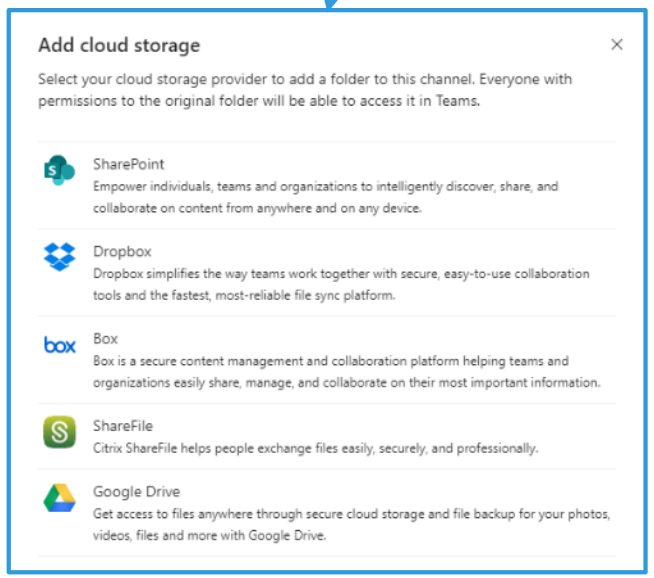
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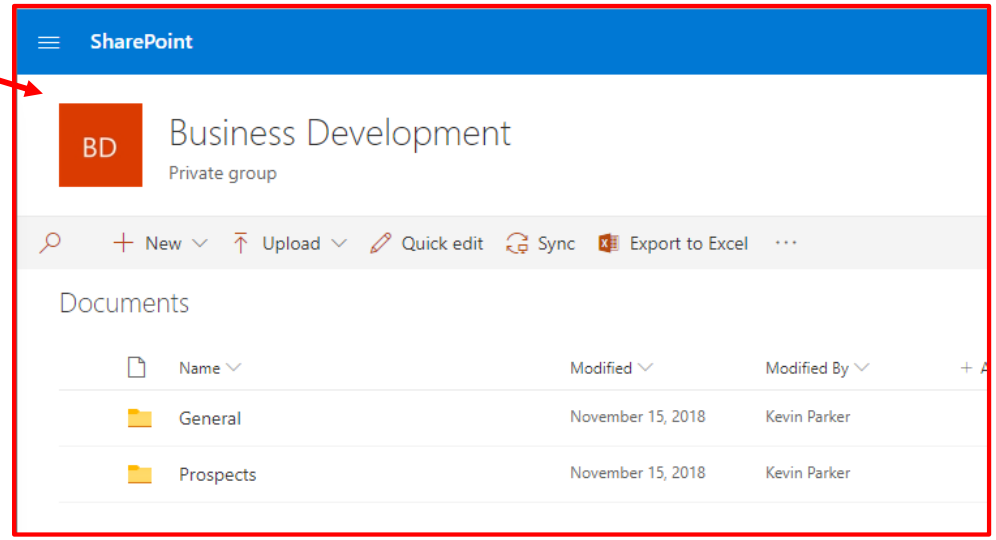
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Teams Files





Each Team has a SharePoint site collection (a unique site with same permissions as the Team). The Files tab is just an interface to the Documents library on that site, and each channel gets its own top-level folder. Other information is stored there, also. You can work with files directly from the Files tab or open the library in SharePoint.



You can also add cloud file storage elsewhere in SharePoint or on some other cloud storage providers.

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Example Solution: Intranet Portal for Communication

1. Strategy & Architecture

- Review current intranet.
- Determine needs and goals of the portal/intranet and libraries for documents, records, and digital assets.
- Provide guidance on cleanup, if needed.
- Design information architecture for the portal as the central SharePoint hub site for the organization.
- Determine needs and goals for an extranet for partners, if applicable.

2. Configuration & Governance

- Configure intranet site and libraries.
- Create links to other tools and solutions.
- Create a help section as a repository for how-to and SOP articles.
- Cleanup pages and content as planned.
- Plan and configure security roles and accounts.
- Configure basic branding of the intranet using corporate colors, logos, and fonts.
- Provide guidance for governance.

3. Implementation & User Adoption

- Complete the intranet plan and test it.
- Configure and verify basic search functionality and results.
- Provide guidance on announcing it to the organization and encouraging adoption.

4. Operation & Maintenance

- Train content authors and editors on maintaining content.
- Train IT staff on overall maintenance.



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Other Solution Ideas?



What other solution ideas might be useful in your context?

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What If We Already Have it Set Up Wrong(ly)?

How do we fix it?

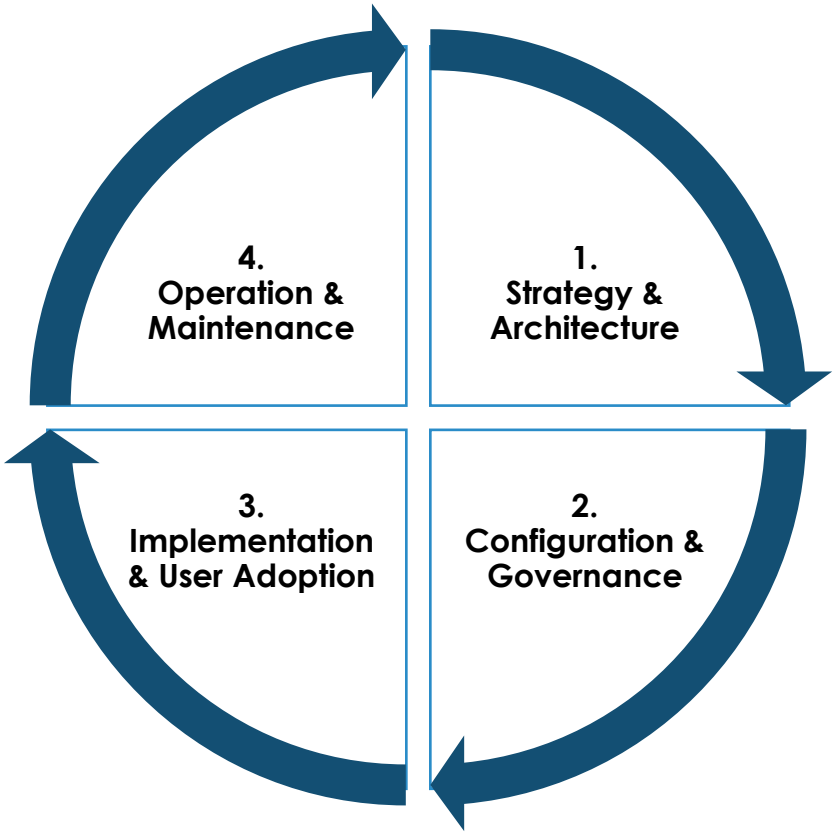
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Foundation & Solution Phases

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Phase 2+: Solution Iterations



- New or Improved Solution 1
- New or Improved Solution 2
- New or Improved Solution 3
- New or Improved Solution *n*

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Additional Resources

Selected Office 365 Resources

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Office 365 Resources

Microsoft Office Documentation:
https://docs.microsoft.com/en-us/office/

Microsoft 365 FastTrack Success Planner:
https://fasttrack.microsoft.com/

Home Use Benefits:
https://www.microsoft.com/en-us/home-use-program/resources

Office 365 Periodic Table:
https://app.jumpto365.com/

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Site: https://app.jumpto365.com/



Dynamics 365
CRM & ERP [Salesforce]

Sway
Next-gen presentations
PRESENTATIONS

Stream
Video portal [YouTube]

Visio Online
Diagramming in the browser

EMPLOYEE PROFILES

Word Online
Word processing in the browser

Excel Online
Spreadsheets in the browser

OneNote Online
Note taking in the browser [Evernote]

PowerPoint Online
Presentations in the browser
OFFICE ONLINE

FILE STORAGE & COLLABORATION

SharePoint Online
Team file sharing & storage

OneDrive for Business
Personal file storage [Dropbox]

Delve
Employee profile & content discovery

FORMS

Forms
Simple forms & polls [SurveyMonkey]

PowerApps
Code-free mobile apps (& forms)

Flow
Code-free workflows [IFTTT]

Power BI
Business analytics & dashboards
BUSINESS APP PLATFORM

OUTLOOK

Mail
Outlook email

Calendar
Outlook calendar

People
Outlook contact list

Tasks
Outlook tasks

TASK MANAGEMENT

To-Do
To-do list for life & work [Wunderlist]

Planner
Everyday project management [Trello]

Project Online
Premium project management
PROJECT MANAGEMENT

CHAT & CONFERENCING

Skype for Business
Instant messaging & video chat [Skype]

Teams
Group chat & video chat [Slack]

Yammer
Social network [Facebook]

SOCIAL NETWORKING

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Customer self-reservations

StaffHub
Frontline employee hub & scheduler
SMALL BUSINESS APPLICATIONS

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Help

Which tool when?

Search

Filter

O..	Task	Area	Tools
1	Work together on documents with colleagues	Communication & Me...	
2	Understand customer preferences and predict requests	Communication & Me...	
3	Meet online to prepare for and troubleshoot a sales event	Communication & Me...	
4	Collect and analyze social media, web, and print outreach data	Communication & Me...	
5	Protect campaign analytics and other sensitive data	Communication & Me...	
6	Access customer reviews and other data securely from your device	Communication & Me...	
7	Resolve customer inquiries through collaboration	Communication & Me...	
8	Create comprehensive press kits by engaging with in-house experts	Communication & Me...	
9	Collaborate on promo event handouts in a chat-based workspace	Communication & Me...	
10	Balance classroom time with other faculty investments	Education	
11	Help a student write a persuasive research paper		

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Review: Solution Lifecycle & User Adoption

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Implementation How do you build it out and get users started?



Operation How do you support users and drive adoption?





User Adoption





Security, Privacy, Management, Business Continuity, Retention, Compliance, etc.



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How to reach me…

Kevin Parker, CIP



www.kwestix.com

twitter.com/JKevinParker

www.linkedin.com/in/JKevinParker

INFO INFORMATION SPECIALIST

CERTIFIED INFORMATION PROFESSIONAL

ecm[m] aiim master

erm[m] aiim master

bpm[m] aiim master

SharePoint[m] aiim master

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