



Microsoft Online Services Configuration

Migration to Microsoft Online Services

Prepared For

CDW Customers

Prepared By

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Purpose of this Document

This document outlines the steps necessary to configure Microsoft Online Services. It also provides pointers to commonly asked questions about items such as client configuration and network connectivity requirements.

Quick Start Instructions

This is a quick outline of the key steps to activate and configure your Microsoft Online Services subscription.

Before you begin, do the following:

- Determine how you will purchase Online Services. You may use a company credit card or if your payment is greater than \$250 per month, you may ask Microsoft to setup a Purchase Order (credit check usually required).
- Determine who hosts your Domain Name Service (DNS) and who has administrative access. You or your ISP will need to add a CNAME record to your hosting file. More details on this are in the “Adding Domains” section of this guide.

These steps are a checklist or quick overview of the process to activate Microsoft Online Services. Detailed steps follow this quick start.

1. Go to <http://mocp.microsoftonline.com>
2. Login with your Windows Live ID (create a Windows Live ID if not already available)
3. Enter your company and profile information
4. Click the Catalog tab to choose a BPOS trial or purchase a subscription
5. Enter CDW Corporation (Partner ID: 554910) as your Microsoft partner
6. Activate your subscription and wait 2-24 hours for an email from microsoftonline.com indicating your site has been provisioned
7. Login to <https://mocp.microsoftonline.com> using your original Windows Live ID, click the subscriptions tab, and choose **Get Credentials**.
8. Login to <https://admin.microsoftonline.com> using these credentials.
9. Begin adding users, configuring your domain, and configuring online services



Recommended Email Migration Timeline

This timeline is applicable for email migration from an on-premise environment. The timeline may be accelerated or extended based on the number of users and company business requirements.

1. One month before migration
 - a. Discuss business requirements and migration plans with CDW Account Manager and CDW Licensing Specialist. If you don't have a direct contact as your CDW account manager please email dean.murray@cdw.com for more information.
 - b. Determine resource migration needs – use in-house resources or CDW consultant
2. Two weeks before migration
 - a. Determine how you will be performing migration. Schedule a date & time for email migration. CDW has resources available to help you with your migration – either onsite or remotely. You may also elect to perform this migration or setup with internal resources.

Consultant Name:	
Migration Start Date & Time:	
Migration End Date & Time:	

3. One week before migration
 - a. Validate purchase of Online Services. Ensure services are active
 - b. Determine who hosts domain and who owns adding domain, first as external relay and then as authoritative to Microsoft Online Services.
 - c. Ensure all users that will use Outlook as their email client have:
 1. Office Pro 2007 or Outlook 2007 (Outlook 2003 support in June 2009)
 2. Download and install Single Signon client on all PCs from <https://home.microsoftonline.com>
4. Three days before migration
 - a. Validate domain settings with DNS hosting provider
 3. Ensure domain is set as external relay and verified in <https://admin.microsoftonline.com>
 4. Ensure domain TTL (Time-To-Live) is set to 5 minutes so updates will happen immediately
 - a. Create user accounts in Online Services
 - b. Notify <Migration Consultant> when the users are uploaded
 - c. Provide the administrator username and password to <Migration Consultant> for Online Services
5. Two hours before migration
 - a. Change domain to authoritative in Microsoft Online Services
 - b. Update MX record at DNS hosting service
 - c. Validate change in Microsoft Online Services
6. <Migration Consultant> begins migration of email and will notify you when it has been completed.
 - a. In some instances, automated email migration may not work. If this happens, you or your consultant will need to extract that email and provide a secure site with instructions on how users can download the email and restore it from a .pst file.



Review System Requirements

Review the client and networking requirements on the following web pages

Client Requirements for Email

<http://technet.microsoft.com/en-us/library/cc742593.aspx>

Networking Requirements (including bandwidth calculations)

<http://technet.microsoft.com/en-us/library/cc745931.aspx>

Recommended: Upgrade all client computers to the latest service packs for the Operating System and email client as outlined in the Client Requirements link above.

Required: Earlier versions of Outlook are not supported as of May 2009. Microsoft has announced that they will support Outlook 2003 in June 2009. The primary difference in functionality will be that free-busy time is not viewable, although Microsoft is also working on a fix for this as well.

Free Mobility Support for Email: Windows Mobile 6 and above is supported. Mobile devices such as I-Phones with Active synch 12 are supported. BIS is supported for Blackberry devices.

Note: For BES (Blackberry Enterprise Server) support, contact dean.murray@cdw.com



Getting Started – Detailed Instructions

1. Go to <http://mocp.microsoftonline.com>

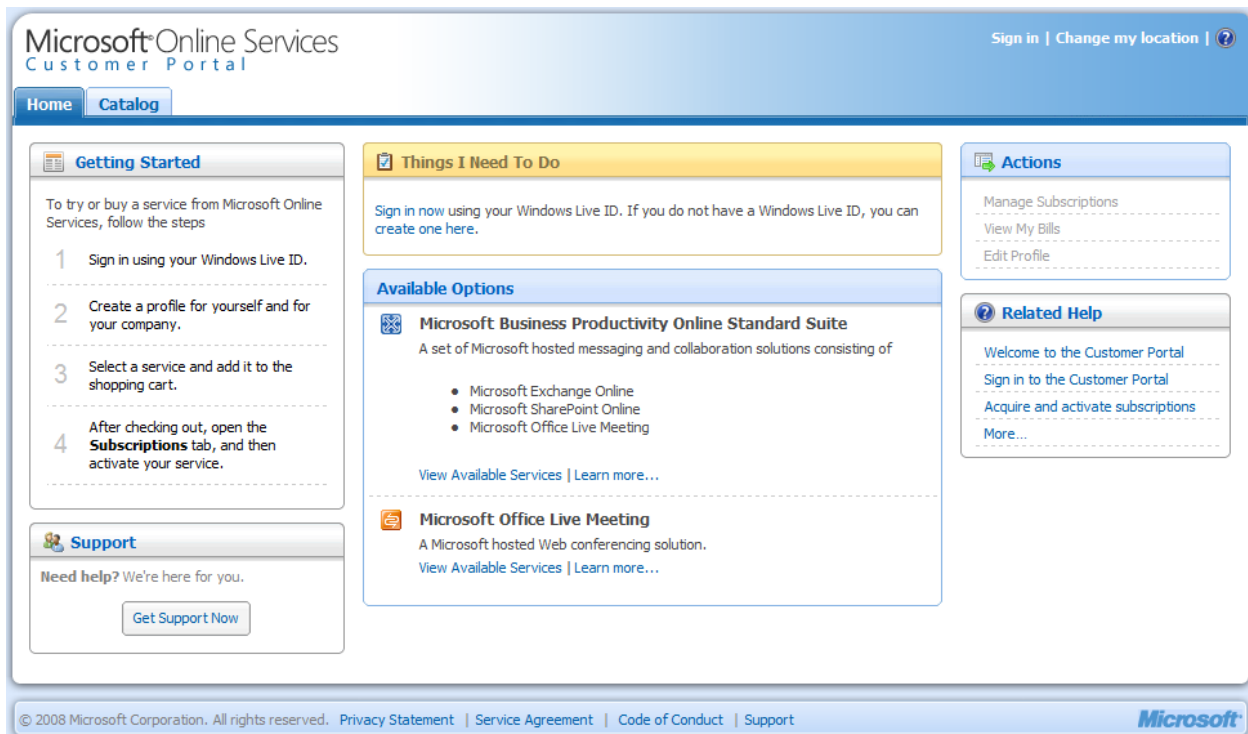


Figure 1: Microsoft Online Services Customer Portal (MOCP)

2. Login with your Windows Live ID (create a Windows Live ID if not already available)
3. As shown in the sample screen shots in Figures 2 – 4, enter
 - a. Contact Information (who will be contacted with subscription information)
 - b. Company profile (company primary location)
 - c. Shipping Address (where you will be billed)

My Profile [Sign Out](#)

- My Contact Information
- My Company Information
- My Shipping Address
- Confirmation

My Contact Information

Enter your information. *Required

* First name: * Last or family name: * E-mail address:
 Example: someone@example.com

I agree that Microsoft may use e-mail and other contact information to provide additional information and offers regarding my subscription as described in the [Privacy Statement for the service](#).

Address Information

* Address line 1: Address line 2: Address line 3:

Address line 4: * City: * State or province:

* ZIP or postal code: * Country or region: * Preferred language:

* Phone number:
 Example: 2065550123

I agree that Microsoft may use my phone number to provide additional information and offers regarding my subscription, as described in the [Privacy Statement for the service](#).

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Figure 2: Sample Personal Profile

My Profile [Sign Out](#)

- My Contact Information
- My Company Information
- My Shipping Address
- Confirmation

My Company Information

Enter your information. *Required

* Name of organization or company:

Web site address:

* Primary activity:

* Number of employees:

My Contact Information has been updated successfully.

Figure 3: Sample Company Profile



My Profile [Sign Out](#)

<ul style="list-style-type: none"> My Contact Information My Company Information ▶ My Shipping Address Confirmation 	<h3>My Shipping Address</h3> <p>Enter your information.</p> <p style="text-align: right; color: red;">*Required</p> <p>The services available to you (and their appropriate taxes) are determined by the country or region you enter here. If you want to order a service for a different location, you can change the country or region from the Shopping Cart when you place that order. Note that the services offered and the local tax may be different in the new location that you choose.</p> <p><input checked="" type="checkbox"/> Copy my contact information</p> <p>* First name: <input type="text" value="Dean"/> * Last or family name: <input type="text" value="Murray"/></p> <hr/> <h4>Address Information</h4> <p>* Address line 1: <input type="text" value="11711 Meridian St N"/> Address line 2: <input type="text" value="Suite 225"/> Address line 3: <input type="text"/></p> <p>Address line 4: <input type="text"/> * City: <input type="text" value="Carmel"/> * State or province: <input type="text" value="Indiana"/></p> <p>* ZIP or postal code: <input type="text" value="46032"/> * Country or region: <input type="text" value="United States"/> * Preferred language: <input type="text" value="English-US"/></p> <p>* Phone number: <input type="text" value="3175694275"/> Example: 2065550123</p>	<p>My Company Information has been updated successfully.</p>
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Figure 4: Sample Shipping Address Information

4. Click Finish to complete your profile.
5. When the confirmation message appears, click Close to complete the My Profile process.

My Profile


<ul style="list-style-type: none"> My Contact Information My Company Information My Shipping Address Confirmation 	<h3>Confirmation</h3> <p style="text-align: center;"> Click Close to submit your information.</p> <p>To update My Profile at any time, on the Home tab, under Actions, click Edit Profile.</p>
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Figure 5: Sample Shipping Address Information

6. Click on the Catalog tab



7. Select one or more services as discussed with your CDW Account Manager or Technical Specialist

Note: If you choose “Try” for the one month BPOS free trial, you can convert this service to “Buy” and keep your configuration settings and data. To convert from a BPOS trial to individual components such as Exchange Online or SharePoint Online you must choose from available options and reconfigure the services.

If you require more users (licenses) to Trial, you can increase the number of users after you have completed signing up for the Trial. To request a 30-day one-time extension and add up to 40 additional seats, go to the following link <https://mocp-support.custhelp.com/> and fill out request information.

8. Click **Add to Cart** to add them to your shopping cart

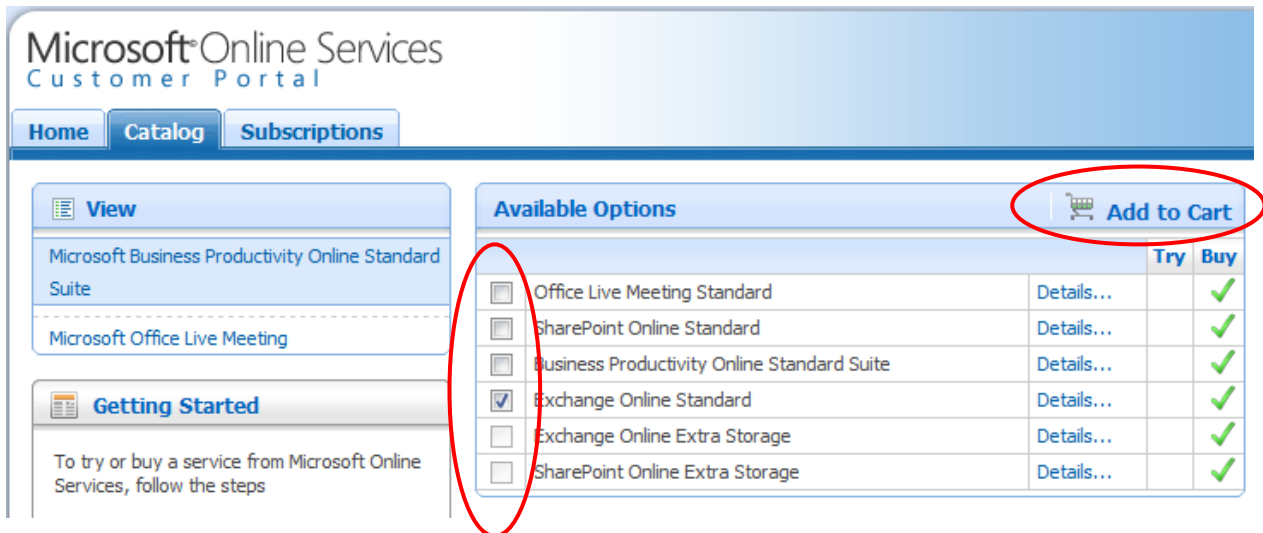


Figure 6: Choose subscription services from Available Options

9. Enter the quantity and click **Update Total**

Microsoft Online Services Customer Portal Dean Murray | Sign Out | ?

Home Catalog Subscriptions Shopping Cart (1 items in cart)

Shopping Cart

[Change](#) **Shipping Address:** * Required
 Dean Murray
 11711 Meridian St N
 Suite 225
 Carmel, IN 46032
 United States

Qty	Unit	Service Name	Type	Partner	Why?	Unit Price/Mo	Discount	Total
<input type="text" value="50"/>	Licenses	Exchange Online Standard	remove	Paid	Find a Partner	\$ 10.00	(\$ 69.50)	\$ 430.50

* I acknowledge that a discount has been applied to my purchase. To learn more and to determine whether you qualify for a discount on future orders or renewals, please contact your Microsoft Partner or click [Learn More](#).

[View Agreement](#) **Subtotal:** \$430.50
Tax: \$0.00

Total per month: \$430.50

[Help](#) [Back to Catalog](#) [Update Total](#) [Proceed to Checkout >](#)

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Figure 7: Updating the quantity before purchasing the Service

10. Click Find a Partner

Microsoft Online Services Customer Portal Dean Murray | Sign Out | ?

Home Catalog Subscriptions Shopping Cart (1 items in cart)

Shopping Cart

[Change](#) **Shipping Address:** * Required
 Dean Murray
 11711 Meridian St N
 Suite 225
 Carmel, IN 46032
 United States

Qty	Unit	Service Name	Type	Partner	Why?	Unit Price/Mo	Discount	Total
<input type="text" value="50"/>	Licenses	Exchange Online Standard	remove	Paid	Find a Partner	\$ 10.00	(\$ 69.50)	\$ 430.50

* I acknowledge that a discount has been applied to my purchase. To learn more and to determine whether you qualify for a discount on future orders or renewals, please contact your Microsoft Partner or click [Learn More](#).

[View Agreement](#) **Subtotal:** \$430.50
Tax: \$0.00

Total per month: \$430.50

[Help](#) [Back to Catalog](#) [Update Total](#) [Proceed to Checkout >](#)

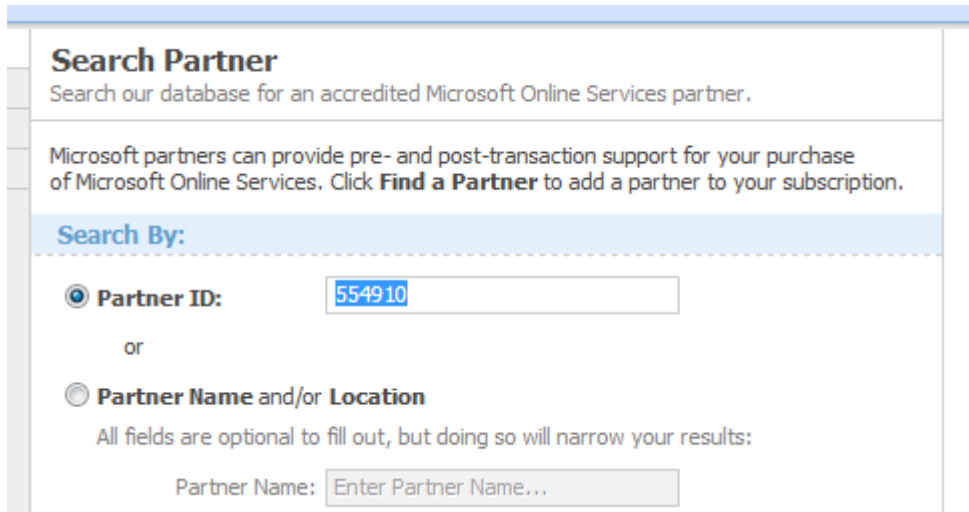
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Figure 8: Find a Microsoft Partner



Note: There is no additional cost to add a Microsoft partner. As a partner, CDW is committed to helping you to with your deployment and ongoing needs. Microsoft will send an email to the CDW Online Services team informing them that you have signed up.

11. Enter a Partner ID of **554910** and click **Search**



Search Partner
Search our database for an accredited Microsoft Online Services partner.

Microsoft partners can provide pre- and post-transaction support for your purchase of Microsoft Online Services. Click **Find a Partner** to add a partner to your subscription.

Search By:

Partner ID:

or

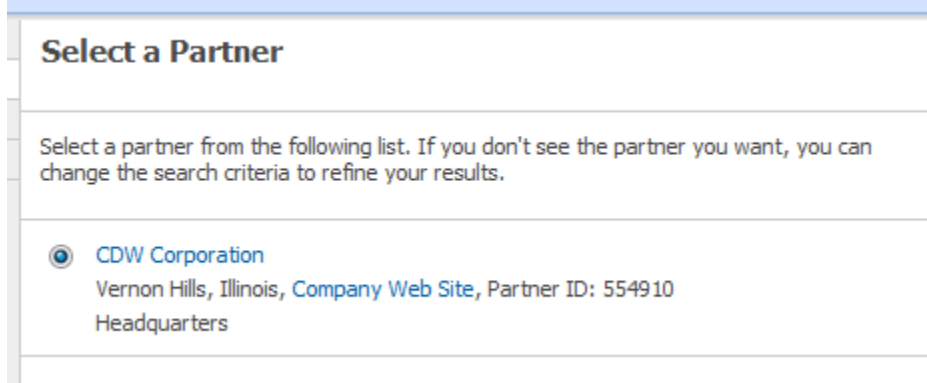
Partner Name and/or Location

All fields are optional to fill out, but doing so will narrow your results:

Partner Name:

Figure 9: Enter the Partner ID

12. Click the Radio Button next to CDW Corporation and Choose Next



Select a Partner

Select a partner from the following list. If you don't see the partner you want, you can change the search criteria to refine your results.

CDW Corporation
Vernon Hills, Illinois, [Company Web Site](#), Partner ID: 554910
Headquarters

Figure 10: Confirm your Partner ID selection

CDW is added as a Microsoft partner and you will return to the shopping cart.

13. Click Proceed to Checkout

14. Read and accept the Terms and Conditions. You must scroll all the way to the end before other fields become active.



15. After you have scrolled down, check the checkbox and enter your information into the **By** and **Title** fields
16. Click **I Accept**
17. You may be prompted for a credit card or customer PO number information
 - a. Enter your billing information and complete your checkout.
18. Confirm your order and record your confirmation number
19. Click on the Subscriptions tab to activate your subscription
20. From the Actions menu choose Activate and click the green arrow to activate your subscription.

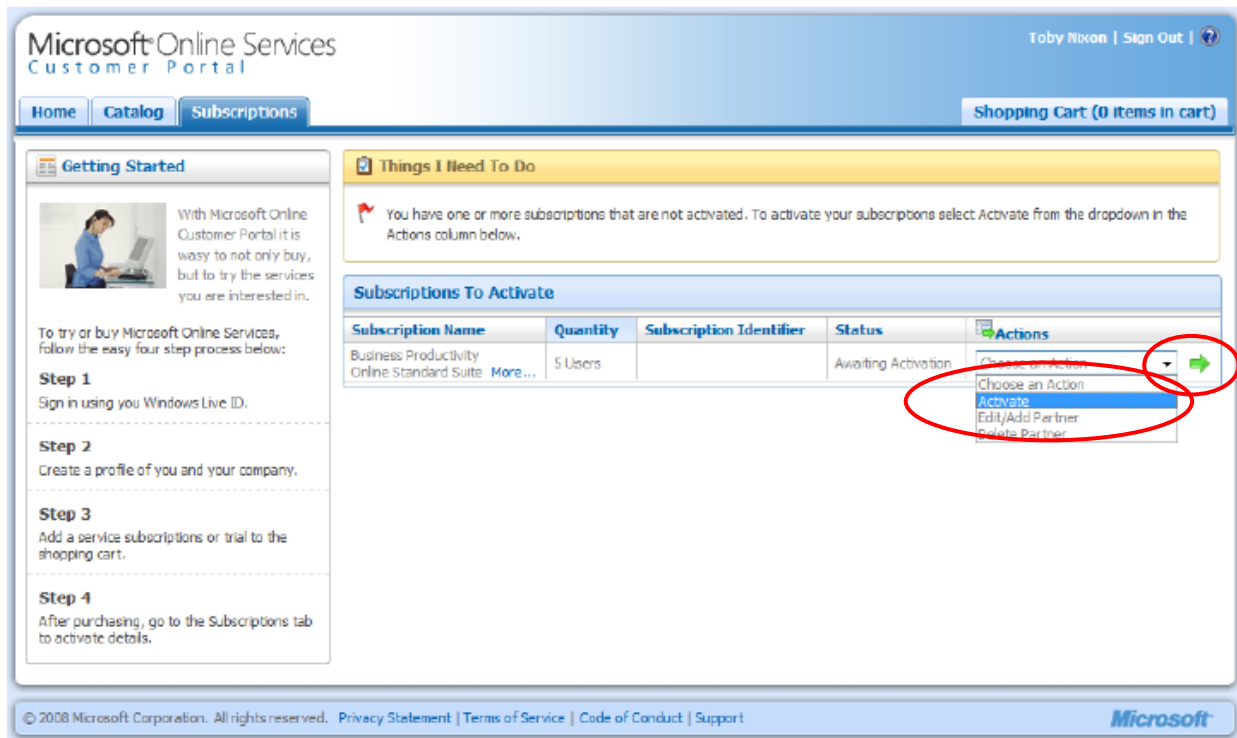


Figure 11: Activate Your Subscription

21. To avoid email being blocked from the Microsoft Online Services team, please add microsoftonline.com to you safe senders list.

PAUSE: It will take from 2 to 24 hours while Microsoft provisions your account. Once your account has been provisioned, you will receive an email instructing you to "Get Credentials".



22. You will receive an email instructing you to login to MOCP and get your administrative account information.
23. To get credentials perform the following steps
 - a. Go to <https://mocp.microsoftonline.com>
 - b. Click the Subscriptions tab
 - c. From the Actions menu, choose **Get Credentials**
24. As instructed, open a browser window and go to <https://admin.microsoftonline.com>
25. Login with your credentials



Adding Domains to Microsoft Online Services

Add domains to Microsoft Online Services to:

- Provide easier logon for users
- Add a company registered domain name
- Add an authoritative domain to route all domain email through Exchange Online

Before You Begin

It is recommended that you lower the TTL (Time To Live) setting with your DNS Hosting provider.

Before you add domains in the next section, you will need administrator access to Microsoft Online Services. Obtain access using the admin account supplied you during the “Get Credentials” process of the Getting Started section or another administrative account you have created.

Microsoft Online Services initially assigned a domain based on information you provided. For example, if you provided a domain name of cdw.com, your domain would be cdw1.microsoftonline.com.

You may want to add your company’s domain name to Microsoft online. Use the following steps to add an external relay or authoritative domain to Microsoft Online Services. For differences between external relay and authoritative domains, see the steps below or read information at <http://www.microsoft.com/online>

1. Open **Internet Explorer**, and navigate to <https://admin.microsoftonline.com>
2. When prompted for credentials, enter an administrative account username and password for Microsoft Online Services
3. Click on the **Users** tab.
4. Within the **Users** tab, click on the **Domains** page. Verify your screen looks like Figure 1 with your domain names listed in the **All Domains** view



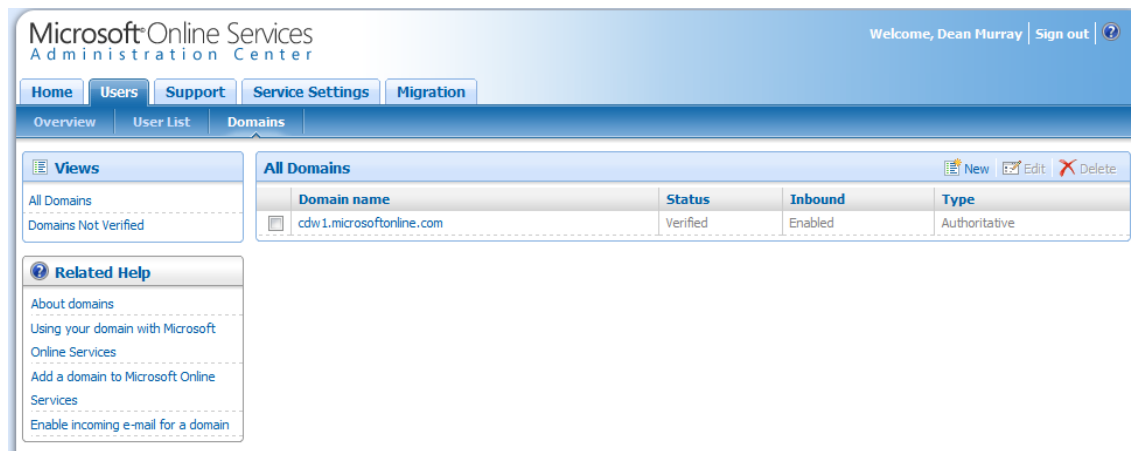


Figure 1: View all your domains on Microsoft Online Services

5. Click on **New** (top right) within the **[All Domains]** view.

To specify your domain name as shown in Figure 2, you or another administrator must have administrative access to the DNS record for the target domain. Select from two options when setting up your domain:

- a. Choose **Authoritative** as a final step when migrating a domain or if you are adding a domain that is not currently mail enabled. The following rules apply
 - i. Microsoft Online Services will handle all mail requests for this domain.
 - ii. **Authoritative** will not only require the domain to be validated, but also **Incoming** Email must be turned on
 - iii. **Authoritative** will require an updated **MX** record
- b. Choose **External Relay** as a first step in migration or when setting up a domain for coexistence on Microsoft Online Services to receive forwarded mail from an on-premise mail server. The following rules apply
 - i. Outgoing mail will be sent from Microsoftonline.com to either the on-premise server (for accounts that reside there) or delivered according to the MX record of the receiver.

Add new domain [Close]

Domain Settings

Confirmation

Domain Properties

Enter the properties for the domain

Domain information * Required fields

* Domain name:

* Type

Authoritative
 Select this option if Exchange Online hosts all mailboxes for this domain.
 Note: You must enable inbound messaging and direct your MX record to Exchange Online.

External Relay
 Select this option if some mailboxes for this domain are hosted outside of Exchange Online and your MX record points to an e-mail server outside of Exchange Online.
 Note: If you select this option, disable inbound messaging.

Figure 2 – Adding your new domain

6. Click **Create**.
7. In the **Confirmation** screen as shown in Figure 3, select the **Start the Verification wizard when this window is closed** checkbox, and click on the **Finish** button.

Add new domain [Close]

Domain Settings

Confirmation

Confirmation

You have successfully created your domain with Microsoft Online Services.

Domain details

Name: dean.com
 Type: ExternalRelay

Verification

Before you can use this domain, you must verify your ownership of the domain, and then change settings on your DNS server. The Verification wizard can guide you through this process.

Start the Verification wizard when this window is closed.
 The Verification wizard will begin when you close this window.

Figure 3 – Confirmation screen that new domain has been added

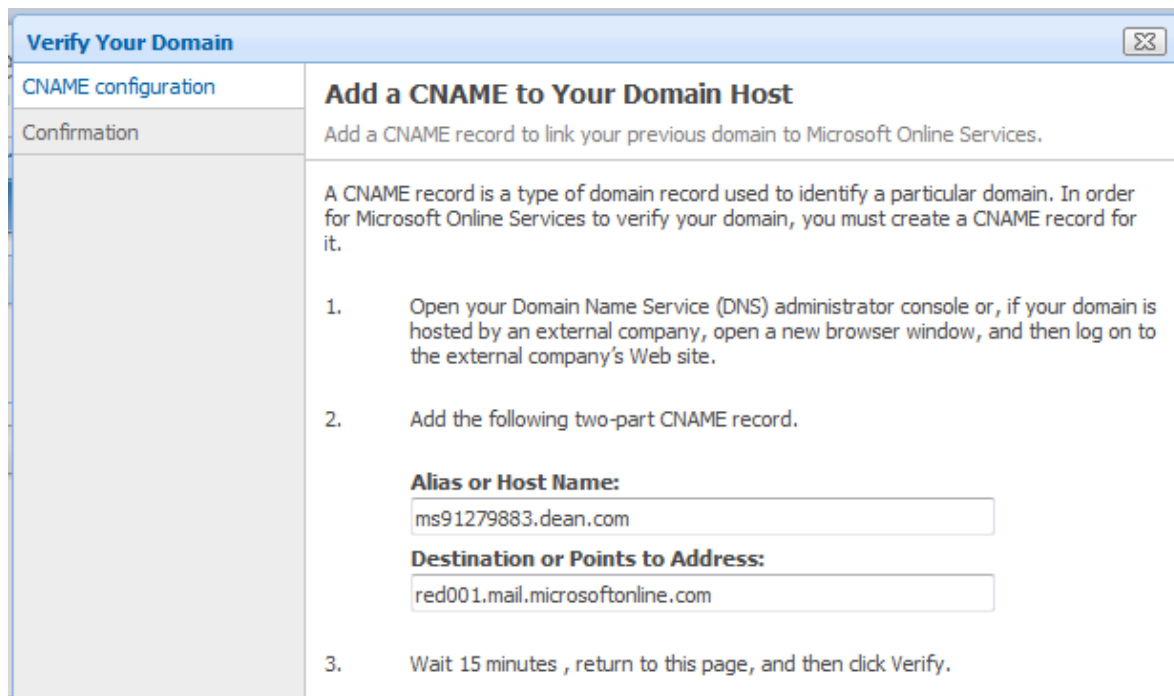


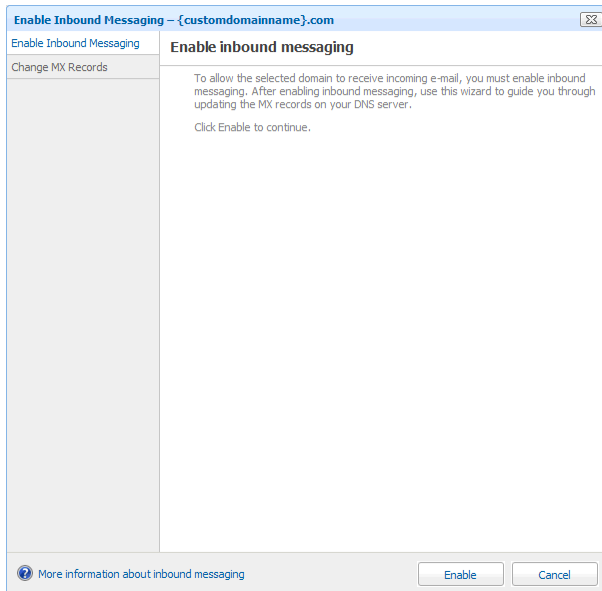
Figure 4 – Sample CNAME record information

NOTE: If your domain name is hosted by another company and you do not have access through an administrative console, send your administrative contact the CNAME information with instructions that you want a CNAME record added to your domain registration.

8. Verify your domain using the following steps.
 - a. Copy the **Alias or Host Name** information.
 - b. Open your Domain Name Service (DNS) administrative console if hosted locally at your company or a browser window if hosted by an external company
 - c. Log on and add the CNAME record information for the target domain.
 - d. Return to the **Verify Your Domain** browser window, and click on the **Verify** button.
 - e. The **Confirmation** screen should now display success. Click **Finish**.
Note: If you receive an error, it is possible you did not wait long enough for DNS records to update. Please try again in 5 minutes.
9. Perform the following steps to make the domain your default domain and enable **Inbound Messaging**.
 - a. Select the checkbox next to the custom domain you just verified.
 - b. Click on the **Edit** button within the **[All Domains]** view.



- c. Check the box next to the **Default user account domain**. This will change the domain suffix to become your custom domain rather than the Microsoft generated domain whenever a new user account is created.
- d. Click on the **Inbound Messaging** tab. Read the information provided in the dialog. These steps detail the process of making Microsoft Online Services your email server.
- e. Click on the **Enable** button.



- i. Within the dialog, click on the **Enable** button.
- ii. Update your domain's **MX** records per the instructions provided

Next Steps in Configuring Your Environment

Additional help is available at the Microsoft Online Services Administration Center.

Read the help sections on:

- Adding users and groups
- Active Directory synchronization
- SharePoint Online configuration
- Email migration

Note: CDW has a Microsoft consulting practice that can accelerate your deployment of Microsoft Online Services. Contact your CDW Account Manager to obtain services from a CDW consultant.

