

Deployment Document for
Office 365 and Mail Defender
V1.0

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1 Provisioning Office 365

This plan will guide you through the required phases on how the intY Office 365 service will be successfully deployed into your environment. In order to increase the success criteria please follow these steps in sequential order.

Detailed below are the installation requirements for the Microsoft Outlook 2007 client to be utilised in conjunction with the Office 365 platform.

Please note the below requirements for the Outlook client, they are slightly different to Microsoft's default requirements for the operating system. This is due to the requirement of Outlook over HTTP, which is contained in Windows 2003 builds and onwards.

1.1 Operating system requirements

- Windows 7, Windows 8 (RTM).
- Mac OS X 10.6 or later.

1.2 Office client requirements

- Office 2010 (SP1), Office 2013.
- Office 2011 for Mac and Outlook 2011 for Mac.
- Lync 2010 & 2013.

1.3 Browser requirements—Administration Centre and My Company Portal

- Internet Explorer 9
- Latest Firefox "Release" version
- Safari 5 or above
- Latest Chrome "Stable" version
- Note: Outlook Web App also has a light version that supports a reduced set of features across almost any browser

Note for Mac users: At this time Communicator for Mac 2011 will not work with Office 365. See [FAQ](#) for additional information about Mac-related system requirements.

Note regarding Office Professional Plus in Office 365: Office Professional Plus is not designed to install on servers or virtualized platforms. Microsoft does not provide technical support services for issues related to the installation or use of Office 365 in a virtual environment, Windows Server Remote Desktop, or other terminal service platforms.

Any users who utilise a PC not meeting the required specification for any of the above options must utilise the Outlook Web Access portal available at:

<https://portal.microsoftonline.com>

Please verify any services you wish to use have their minimum system requirements met by any machine you wish to use them on.

2 Obtaining your login credentials & Logging In

From the Services screen listed in Cascade, click the relevant subscription and scroll to the **Service Parameters** section. Once the subscription is active, you will find the administrator username and password listed here. You will also find a default onmicrosoft.com domain which is used for internal Office 365 purposes but can also be used as an external domain. For example:

Provisioning Information

Status: Active

Service Parameters

Domain Name [redacted].onmicrosoft.com

Admin Username admin@[redacted].onmicrosoft.com

Admin Password [redacted]

Once you have your login credentials, please follow the steps below:

- Go to the Administration Centre (<https://portal.microsoftonline.com>)
- When prompted, sign in with credentials provided in CASCADE (**PLEASE NOTE:** Your password is Case Sensitive)
- For security reasons we recommend you create your own personal administrative account rather than using the default admin@ account.

2.1 Creating a deployment plan

On logging into the administration portal with an administrator account, select the **Setup** menu on the left menu bar and then select **basic setup** to begin planning your migration.

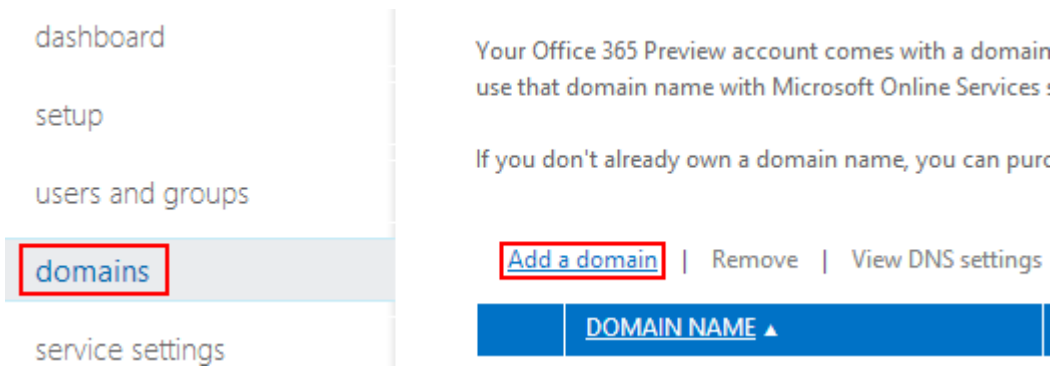
Note: please be aware that the **custom setup** plan is designed for large organisations with a dedicated on-staff IT contact responsible for maintaining services. Active Directory synchronization requires a number of additional steps and falls outside of the scope of this deployment planning document though relevant information is referred to where applicable.

3 Deploying Office 365 Services

3.1 Add your domain

You will need to follow the steps below in order to fully set up your service.

From within the Microsoft Online Administration Portal, select the **domain** option on the left menu bar and click **Add a domain** to begin the domain wizard



3.1.1 Domain verification

Click **start step 1** to begin. Firstly, enter the domain to add and click the **Next** button. In the drop-down select **General instructions** and follow the required information to add a TXT record with your domain registrar.

Note: When provided with the option of verifying by using either TXT or MX records, please ensure that you select the TXT record verification. The functionality of MailDefender requires that all MX records in place for a domain be valid, so inputting an invalid validation MX record will disrupt mail flow.

You will now need to make the first DNS change, adding a TXT record as advised. Once you have notified your DNS registrar you can click **continue later** to return to the portal.

Note: the information included below is given as an example of the information screen, do not enter the details as they appear on the screenshot below.

RECORD TYPE (CHOOSE ONE)	ALIAS OR HOSTNAME	DESTINATION OR POINTS TO ADDRESS	TTL
TXT	@ or mydomain.com	MS=ms12345678	1 Hour

Once the DNS change has been made and has taken effect, re-open the administrative portal and click **domains** in the left menu bar. Next to the new domain click **setup in progress**. Click **start step 1** then **done, go check**. When you receive the final success confirmation, click **finish** and you will be prompted to create users.

3.1.2 Skip user account creation

Select the option for **I don't want to add users right now** and click **next**. This is covered in phase 2.2.

3.1.3 Add additional DNS records

Once the previous two steps are complete, click **start step 3** and select the domain intent, i.e. which services you wish to use the domain for. Please be aware that you cannot use a domain for SharePoint and for any other service as this option refers to

public web hosting not site collections. If all three services are required, please use a subdomain (e.g. www.mydomain.com) for SharePoint. Click **done, go check** to continue.

Note: the **highlighting red** MX record does not need to be added to your DNS record as the DNS information should use MailDefender (see phase 7 for further information), however all other records should be followed. For this reason it is not possible to complete the domain setup. It is recommended that instead the wizard is left at this stage by clicking **Cancel**. Provided Step 1 has been completed successfully and all DNS records except the MX records have been added, you will be able to use the domain for the rest of this guide.

Exchange Online

TYPE	PRIORITY	HOST NAME	POINTS TO ADDRESS	TTL
MX	0	@	mydomain-com.mail.protection.outlook.com	1 Hour
CNAME	-	autodiscover	autodiscover.outlook.com	1 Hour

TYPE	TXT NAME	TXT VALUE	TTL
TXT	@	v=spf1 include:spf.protection.outlook.com -all	1 Hour

Lync Online

TYPE	SERVICE	PROTOCOL	PORT	WEIGHT	PRIORITY	TTL	NAME	TARGET
SRV	_sip	_tls	443	1	100	1 Hour	mydomain.com	sipdir.online.lync.com
SRV	_sipfederationtls	_tcp	5061	1	100	1 Hour	mydomain.com	sipfed.online.lync.com

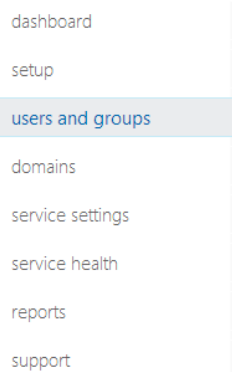
TYPE	HOST NAME	POINTS TO ADDRESS	TTL
CNAME	sip.mydomain.com	sipdir.online.lync.com	1 Hour
CNAME	lyncdiscover.mydomain.com	webdir.online.lync.com	1 Hour

3.2 Add users

After you have completed all of the required DNS changes and your domains are fully verified within the administration portal you are ready to start adding your users.

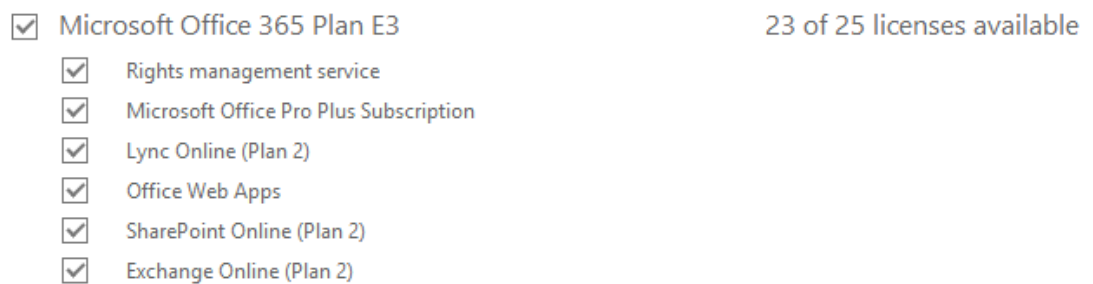
3.2.1 Add users individually

1. Navigate to: <https://portal.microsoftonline.com> and log in using your Administrator username and password as detailed in Section 1 of this document.
2. Click **users and groups** from the left menu bar.



3. Click the new user icon (**+**) from above the list of existing user accounts
4. Complete the required fields and then click **next**. Mandatory fields are marked with an asterisk. Additional fields can be entered by clicking **additional details**.
5. On the settings screen select whether you want the user to have administrator permissions and select the user's location. Note that if you need to assign administrative permissions, you must supply an alternate email address to which password reset requests can be sent. Click **next** to continue.
6. On the licenses screen select the licenses that you wish to assign to the user and click **next**.

assign licenses



7. On the Email screen select whether you want to email the new user's account details and enter the email address if applicable. Finally, click **create** to complete the wizard.
8. The Results screen will show you whether the provisioning of the new user has been successful.

results

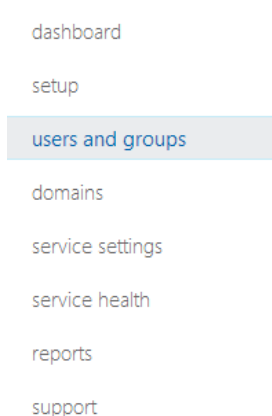
Review your results.


USER NAME	TEMPORARY PASSWORD
testMSOuser@mydomain.com	Xojo9035

9. Click **finish**
10. **Repeat steps 1 -10 for all users required.**

3.2.2 Bulk add users using a CSV file

1. Navigate to: <https://portal.microsoftonline.com> and log in using your Administrator username and password as detailed in Section 1 of this document.
2. Click users and groups from the left menu bar.



3. Click the bulk add users icon () from above the list of existing users.
4. Download the CSV file template and save it locally on your PC.

select a csv file

To bulk add users, select a CSV file containing user information. To see the required f



Path and file name:

[Download a blank CSV file](#)

Create a new CSV file from this template using a text editor, such as Notepad.



5. Complete the template with the details of all of the users to be imported.

6. Navigate back to step 4 if the window was closed
7. Click the Browse button and select the completed template from your PC and click **Next**
8. The results of the import will be displayed. If errors occur, the log file can be viewed for a description of the problem.



	RESULTS	QUANTITY
	Users that passed verification:	0
	Errors:	2

Log file: [View](#)

9. Click **next** if the import was successful.
10. On the Settings screen select the sign in status for the newly imported users and select the users location
11. On the Licenses screen select the licenses that you want to assign to the imported users – if the licenses are varied you can deselect all of the services on this screen and add each of the services to the users later on a one by one basis or check box-based basis.
12. Choose whether to send the log in details by email
13. Click **Create**
14. The Results pane will load, click **close** once the details have been recorded.

	RESULTS	QUANTITY
	Users created:	2
	Errors:	0

Log file: [View](#)

	USER NAME	TEMPORARY PASSWORD
	Andy@mydomain.com	Dopa6231
	Bob@mydomain.com	Furu1853

3.2.3 Synchronise users from an Active Directory Environment

While the standard migration plan does not detail configuration options for Active Directory Synchronisation (DirSync) or Single Sign On (AD FS / SSO) information on these resources is available from the following Microsoft help topics:

Active Directory synchronization: Roadmap - <http://onlinehelp.microsoft.com/en-us/office365-enterprises/ff652543.aspx>

Single sign-on roadmap - <http://onlinehelp.microsoft.com/en-us/office365-enterprises/hh125004.aspx>

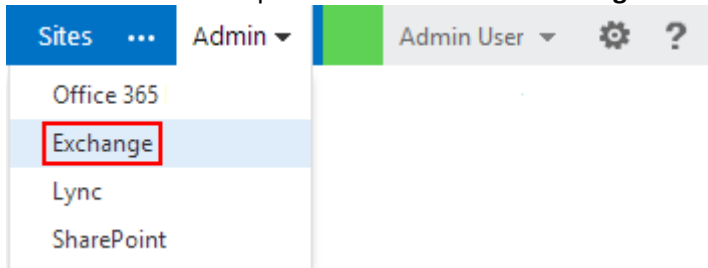
3.3 Set the domain purpose and configure DNS

Please be aware that Office 365 might inform you that it could not find some of the DNS records you have created for your domain, you can ignore this message as it is being displayed because the MX records are pointing to MailDefender. It will not cause any disruption to your email flow and you should be able to progress with the services deployment.

Although your domain status will say "Setup in progress", you will be able to add new users and set their address using the new domain name without problem.

4 Add User Aliases via Exchange Control Panel

1. Navigate to: <https://portal.microsoftonline.com>
2. Log in using an account with Administrator rights
3. Select the **admin** drop-down and then click **exchange**



4. Select each user account by double-clicking their Display Name and clicking the **email address**

general
mailbox usage
contact information
organization
▶ **email address**
mailbox features
member of
MailTip
mailbox delegation

Each email address type has one default reply address. The default reply address is displayed in bold. To change the default reply address, select the email address that you want to set as the default, and then double-click to edit it.

Email address:
+ ✎ -

TYPE	EMAIL ADDRESS
SIP	testMSOuser@mydomain.com
SMTP	testMSOuser@mydomain.com

5. Click the add button icon (**+**) and enter the new email address required. Please note that standard email aliases will be of the **SMTP** type. Other options available are for advanced use. If this email address is intended to be the primary sending address of the user, please ensure the **make this the reply address** box is ticked. Finally, click **ok** to confirm.

Email address type:

SMTP

EUM

The address can be EX, X.500, X.400, MSMail, CcMail, Lotus Notes, NovellGroupWise, EUM Proxy address, and free text. [Learn more](#)

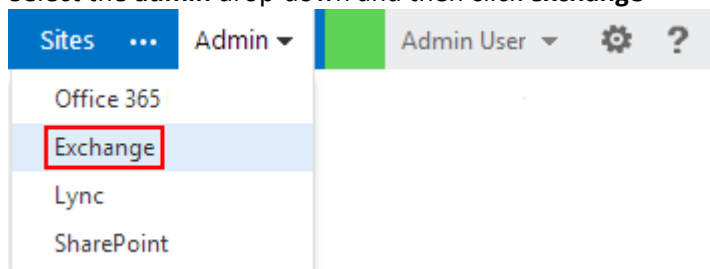
*Email address:

Make this the reply address

6. Click **save** to complete the wizard. Any errors will be alerted at this point.
7. Repeat steps 5 to 7 for all users who require additional aliases.

5 Add Distribution Groups

1. Navigate to: <https://portal.microsoftonline.com>
2. Log in using an account with Administrator rights
3. Select the **admin** drop-down and then click **exchange**



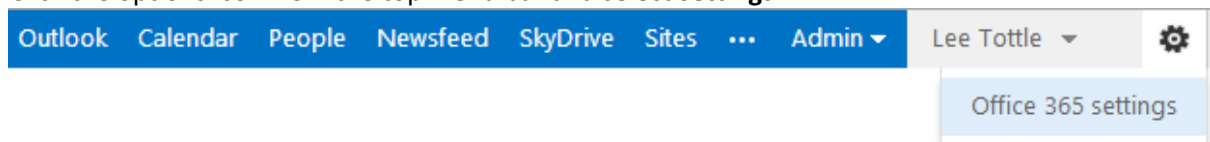
4. Select **groups** along the top menu bar.
5. Click the add button icon (**+**) then **distribution group** to create a new distribution group.
6. Enter the required information into the pop up window to configure the new distribution group. Mandatory fields are marked with an asterisk. Additional fields can be entered by clicking **additional details**. Click **save** to complete the wizard.

7. If the distribution group must be open to email from external senders (users outside of the accounts on Office 365) it is important to double-click and re-open the group then select **delivery management** on the left menu bar. From here, highlight the option for accepting mail from **senders inside and outside of my organization**. Click **save** to complete the wizard.

6 Configure end user PC's

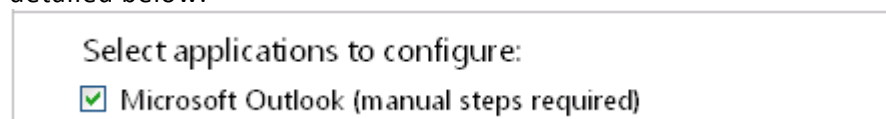
The following steps must be completed on for all users who are moving to Office 365 and do not use the Office 2013 desktop software. The steps are very simple so most end users should be able to complete the setup themselves.

1. Navigate to: <https://portal.microsoftonline.com>
2. Click the options icon from the top menu bar and select **settings**.





3. Click **software** to continue.
4. Depending on your subscription level, you will be presented with a number of applications to in the left menu bar: Office (which includes Lync), Lync, Tools, and Desktop setup. Click **desktop setup** and then **set up**.
5. Sign in using your Microsoft Online Services ID.
Office 365 desktop setup will check your system configuration. If the scan completes without detecting any problems, you'll be presented with options to configure your desktop applications and learn more about the important updates Office 365 desktop setup will install. If a problem is detected, see Troubleshoot update and configuration issues for Office 365 for more information.
6. After you have selected the applications you want to configure, click **Continue**, review the service agreements, and then click **I accept** to begin installing updates and configuring desktop applications.

Note that next to Microsoft Outlook it states "**manual steps required**". These are detailed below.



You can click continue and it will install any updates and then give you the following screen.

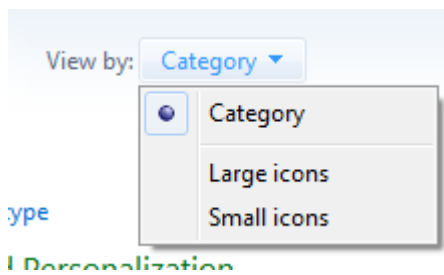
Name	Status
 Configure Microsoft Outlook	Manual steps required
 Shortcuts for Microsoft Office 365	Configured

Click “finish”

Setting up Outlook manually.

On your PC go to the control panel and double click on “mail”.

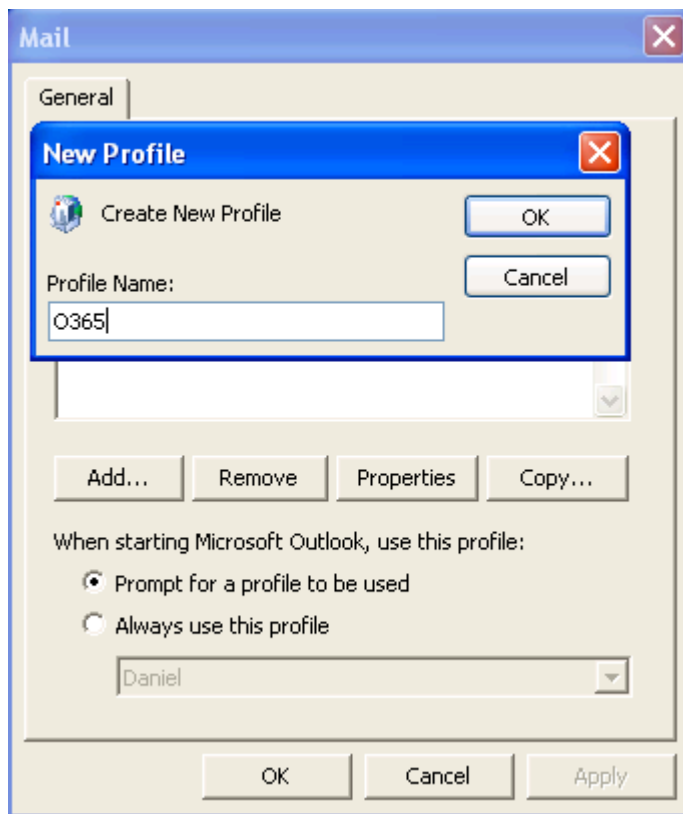
Windows 7 Users: If mail is not showing as an option in the control panel click category and select large icons.



This will bring up a “mail setup” window.

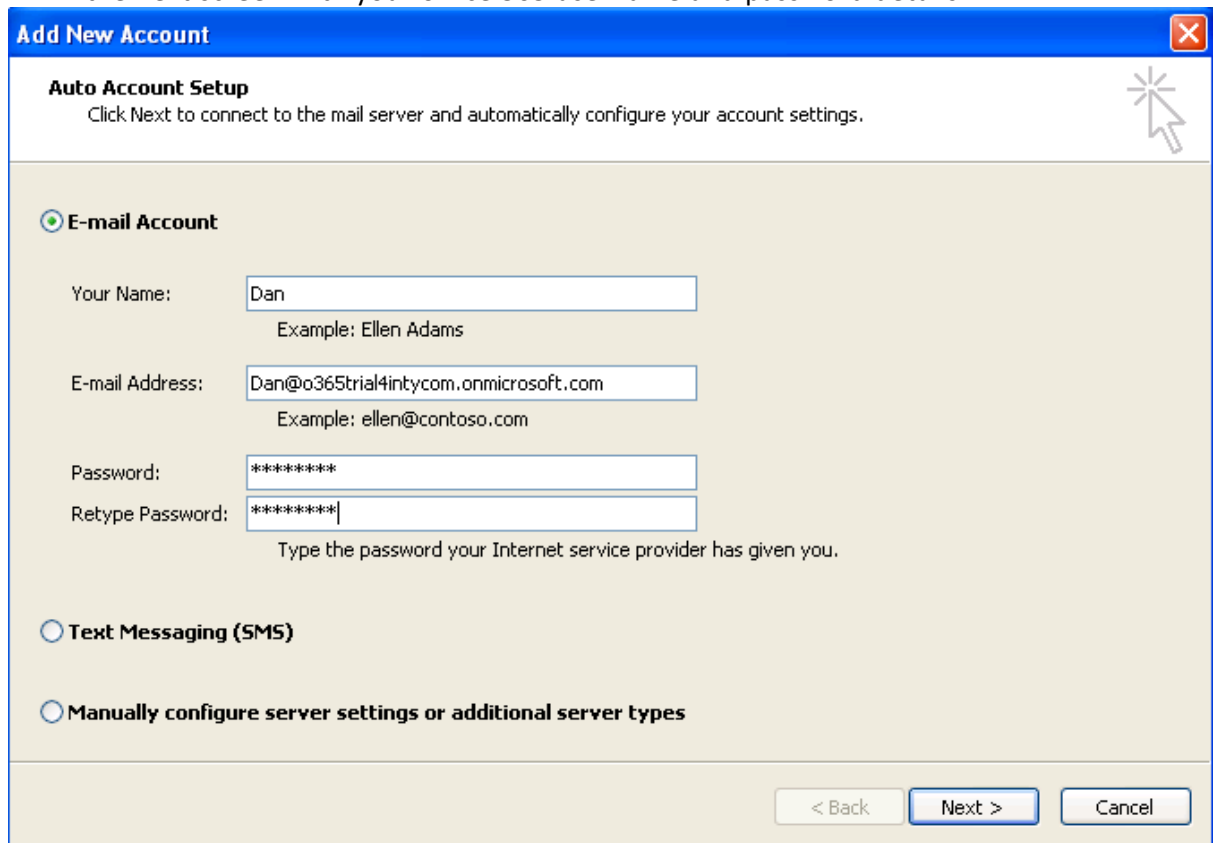


Click on “show profiles” then click on “add”

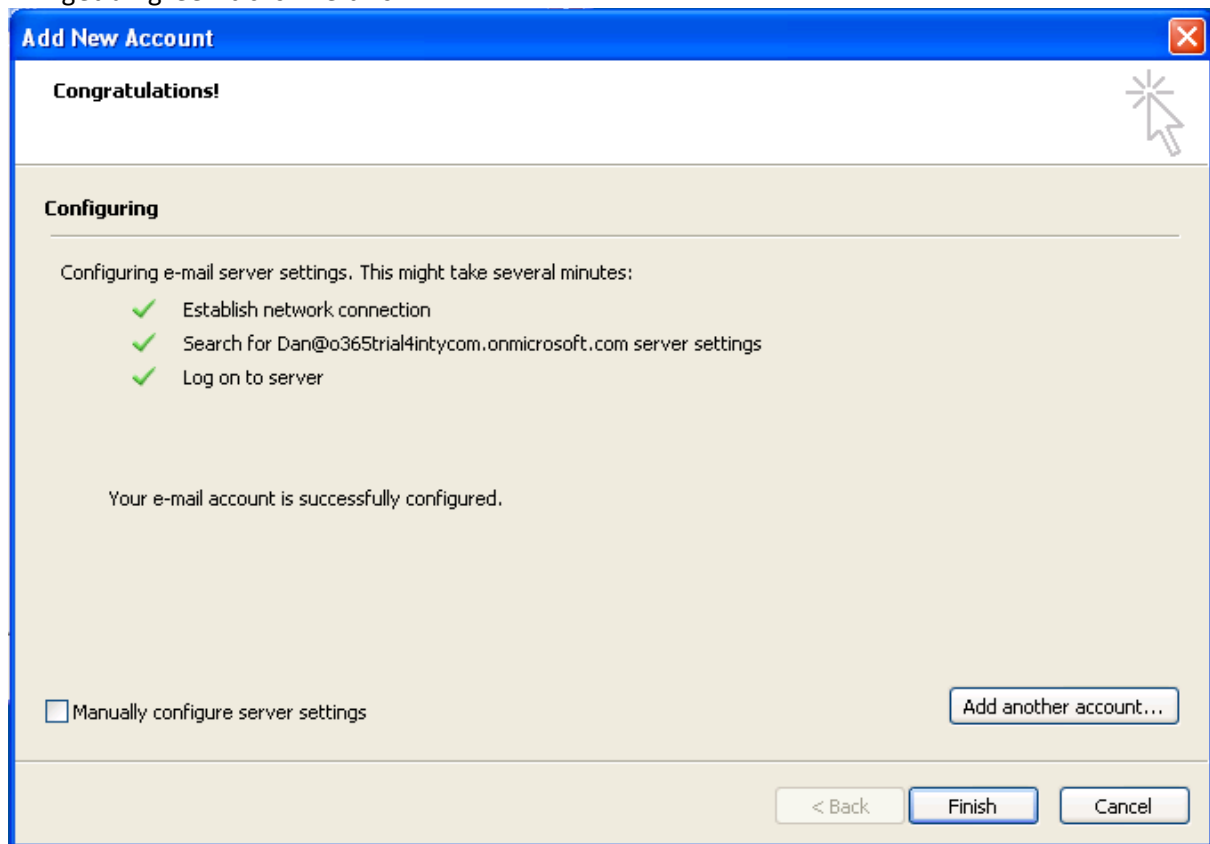


Name the account something that you will remember, for example O365 and click “ok”

Fill in the next screen with your office 365 username and password details



Click on “**Next**”. This will then run the connection test and get all of your details. You will get all green ticks like this.



Click “**finish**” and go back and click “**OK**” and open Outlook. This will now open up and be ready to use with Office 365.

Important: Some of the applications may have shaded check boxes. This can occur if your account has not been provisioned to use this application with Office 365 or if you do not have the required applications already installed on your computer.

7. When the installation and configuration have completed, you may have to restart your computer to finalize the installation and configuration processes.

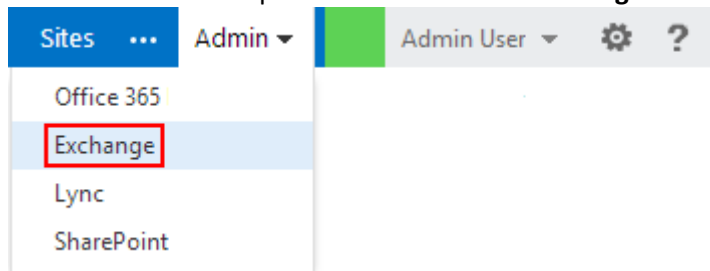
After running Office 365 desktop setup, a shortcut to the Office 365 portal will be added to the **Start** menu on your desktop.

Note: If you encounter a problem while setting up your desktop, a support agent or administrator may ask you to collect a log by pressing Shift, Ctrl, and L simultaneously on your keyboard.

7 Migrate Legacy Data

Data can be imported from existing email systems by a number of options depending on the existing environment. All data can be transferred from Exchange 2003 & 2007 systems or just mail can be imported via IMAP via the admin portal. For other systems, PST files must be backed up and imported into the new system. To begin a new migration, please follow the steps below:

1. Navigate to: <https://portal.microsoftonline.com>
2. Log in using an account with Administrator rights
3. Select the **admin** drop-down and then click **exchange**



4. Select **recipients** on the left menu bar then **migration** along the top menu bar
5. Click the add button icon (**+**) then **migrate to exchange online**

7.1 From an existing exchange system

Email migration is supported from existing Exchange Environments running Exchange 2003 or above. Migrations with these systems will require an SSL certificate from a valid Certificate Authority to be installed prior to beginning the data import process. Once this has been completed and the settings are available, the process can be access by selecting the **cutover migration** option following phase 6's initial steps.

From here, please review the following documentation on setting up the migration pre-requisites and starting a migration batch: <http://technet.microsoft.com/en-us/library/jj159539.aspx>

7.2 From an IMAP system

IMAP can be used to import emails from an existing system, but please be aware that this process only supports email transfer; calendars and contacts must be migrated separately either by PSTs or manual export to other support file types. To begin the migration, select the **cutover migration** option following phase 6's initial steps.

From here, please review the following documentation on setting up the migration pre-requisites and starting a migration batch: <http://technet.microsoft.com/en-us/library/jj159545.aspx>

7.3 From all other systems

If your existing email system is not a Microsoft Exchange environment, you will need to export all users legacy email as PST files from within Outlook.

When a new Outlook profile is created by Office 365, you as the system administrator will need to use the import/Export function within Outlook to import each user's exported PST files. Once imported the office 365 mailbox will begin synchronizing back to Microsoft servers. Once the Synchronisation is complete all emails will be available on the users Outlook and Outlook Web Access.

NOTE: We recommend that the import of legacy data is staggered across your user base as the synchronization process will increase traffic on your broadband line which may affect its performance during this time.

8 Mail Defender and Live Switch to Office 365

Following completion of Phases 1 to 6 above, the service is now live. All email must route via Mail Defender and onto the office 365 platform. Until the actions within Phases 1 to 6 are complete Outlook Web Access will operate as the primary email client for all new internal and external email.

For Outlook Web Access (the web-based email client) browse to <https://portal.microsoftonline.com> and select "Outlook" from the top.

In order to fully switch your email system onto, your MX records and intY mail defender account must be set up to relay email directly to Microsoft's servers. The order and time in which this happens is dependent on whether you are an existing or new Mail Defender Customer.

8.1 New Customers

MailDefender Anti-Spam and Anti-Virus service has already been activated as per the following login credentials. You must contact ensure that you contact intY support to request that the relay to address within your MailDefender account be updated to deliver mail to Office 365 for your domains.

During provisioning your account was created with a holding relay address of: 'changeme.unconfigured.com'. This value MUST be updated following the successful verification of your domain(s) within Office 365 PRIOR to updating the MX records for your domain.

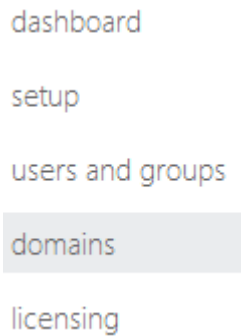
To log in to MailDefender, please follow the instructions below:

- Go to the MailDefender Portal (<http://login.maildefender.net/>)
- When prompted, sign in with the following credentials:

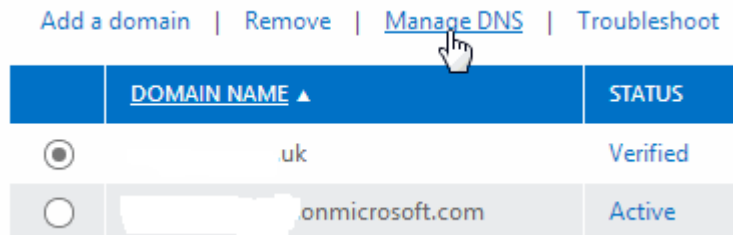
- a. Customer: **[insert customerID]**
 - b. Username: **[insert username]**
 - c. Password: **[insert password]**
- (PLEASE NOTE:** Your password is Case Sensitive)

Retrieve unique relay addresses for each verified domain on Office 365

- 1. Navigate to: portal.microsoftonline.com
- 2. Login using your Office 365 administrator account username and password
- 3. Click the domains link from the left hand navigation pane.



- 4. Select the radio button next to the domain for which you want to view the DNS information, then click the 'Manage DNS' link



- 5. Click the black down arrow next to 'DNS records created automatically by Office 365'
- DNS records created automatically by Office 365
- 6. Copy the value in the MX filed highlighted in red

DNS records created automatically by Office 365 ▲

These are the DNS records for your Microsoft Office 365 services. They are displayed for your information and cannot be modified.

TYPE	PRIORITY	HOST NAME	POINTS TO ADDRESS	TTL
MX		@	.outlook.com	
CNAME	-	autodiscover	autodiscover.outlook.com	1 Hour
CNAME	-	sip. .uk	sipdir.online.lync.com	1 Hour
CNAME	-	lyncdiscover. .uk	webdir.online.lync.com	1 Hour

TYPE	TXT NAME	TXT VALUE	TTL
TXT	@	v=spf1 include:spf.protection.outlook.com -all	1 Hour

TYPE	SERVICE	PROTOCOL	PORT	WEIGHT	PRIORITY	TARGET	NAME	TTL
SRV	_sip	_tls	443	1	100	sipdir.online.lync.com	.uk	1 Hour
SRV	_sipfederationtls	_tcp	5061	1	100	sipfed.online.lync.com	.uk	1 Hour

7. Paste this value into an email and send it to support@inty.com with a clear instruction for the relay address for your domain to be updated in MailDefender. You can use the sample text below to do this:

Hi intY support,

Please can you update the relay to address in MDF from changeme.unconfigured.com for the domain [insert domain here] with the following value:

[insert copied value from O365 portal].

Regards,

[your name]

Once you are happy that the steps details in phases 7.1.1 or 7.1.2 have been completed correctly then you must update your MX records to point to Mail Defender. Upon doing this all emails will be scanned by Mail Defender and forwarded on to the destination you have specified to us; your existing mail service or Office 365.

Please instruct your ISP to set the MX records for the above domains to the following, in priority order:

**mx1.maildefender.net IN MX 10.
mx2.maildefender.net IN MX 20.
mx3.maildefender.net IN MX 30.
mx4.maildefender.net IN MX 40.
mx5.maildefender.net IN MX 50.**

To have your outbound email scanned, please set your next-hop mail relay to:
smtp.maildefender.net

These settings will provide for maximum redundancy.

To further ensure that no malicious emails can bypass our mail system by connecting directly to your mail server, we recommend you firewall your mail server and only allow SMTP connections from the following IP address ranges:

195.90.96.0 / 255.255.254.0

Note: when your MX records are updated made, the following points must be considered:

- Any user who has not reconfigured their client (mobile device or PC) will not receive new mail.
- Any user/group/contact/address which has not been created in Office 365 will reject email sent to it.

8.1.1 Staged deployment

If you would like to still send mail to your current email server during deployment, the following additional steps are required:

- You must add a forwarding rule on the existing email system for each user to direct new mail to a specific Office 365 address. These forwarders must be configured to send mail to the unique @microsoftonline.com addresses which will be created during your Office 365 account creation. The addresses can be found and updated in the list of aliases detailed in Phase 3.
- Please ensure that the following information is provided to support@inty.com to amend the MailDefender destination address:

Domain Name	Your outgoing IP	Scanned mail sent to
	[IP]	

Once the deployment has been completed, the existing MailDefender destination address must be updated to direct mail to the Office 365 platform. Please request this be carried out by emailing support@inty.com.

Please note that once the MX records for MailDefender are in place, all new mail will be relayed to the destination address set by intY as per the information above. Note that when this change is made, the following points must be considered:

- Any user who has not reconfigured their client (mobile device or PC) will not receive new mail.
- Any user/group/contact/address which has not been created in Office 365 will reject email sent to it.

8.2 Cutover deployment

Please note that once the MX records for MailDefender are in place, all new mail will be relayed to the destination address set by intY as per the information above.

8.3 Existing Customers

Your MX records should already be pointing to Mail Defender with your email relaying on to your existing mail platform.

Once your Office 365 account has been fully set up as detailed in the earlier phases of this document, please request that the MailDefender destination address be updated to send mail only to Office 365 by emailing support@inty.com.

You will need to log into the Office 365 administration portal to retrieve the unique relay to address values for each of your verified domains. To do this follow the steps below:

1. Navigate to: **portal.microsoftonline.com**
2. Login using your Office 365 administrator account username and password
3. Click the domains link from the welcome landing page.

dashboard

setup

users and groups

domains

licensing

4. Select the radio button next to the domain for which you want to view the DNS information, then click the **'Manage DNS'** link

[Add a domain](#) | [Remove](#) | [Manage DNS](#) | [Troubleshoot](#)

	DOMAIN NAME ▲	STATUS
<input checked="" type="radio"/>	.uk	Verified
<input type="radio"/>	onmicrosoft.com	Active

5. Click the black down arrow next to 'DNS records created automatically by Office 365'

DNS records created automatically by Office 365 ▼

7. Copy the value in the MX filed highlighted in red

DNS records created automatically by Office 365 ▲

These are the DNS records for your Microsoft Office 365 services. They are displayed for your information and cannot be modified.

TYPE	PRIORITY	HOST NAME	POINTS TO ADDRESS	TTL
MX		@	.outlook.com	
CNAME	-	autodiscover	autodiscover.outlook.com	1 Hour
CNAME	-	sip. .uk	sipdir.online.lync.com	1 Hour
CNAME	-	lyncdiscover. .uk	webdir.online.lync.com	1 Hour

TYPE	TXT NAME	TXT VALUE	TTL
TXT	@	v=spf1 include:spf.protection.outlook.com -all	1 Hour

TYPE	SERVICE	PROTOCOL	PORT	WEIGHT	PRIORITY	TARGET	NAME	TTL
SRV	_sip	_tls	443	1	100	sipdir.online.lync.com	.uk	1 Hour
SRV	_sipfederationtls	_tcp	5061	1	100	sipfed.online.lync.com	.uk	1 Hour

- Paste this value into an email and send it to support@inty.com with a clear instruction for the relay address for your domain to be updated in MailDefender. You can use the sample text below to do this:

Hi intY support,

Please can you update the relay to address in MDF from **changeme.unconfigured.com** for the domain **[insert domain here]** with the following value:

[insert copied value from O365 portal].

Regards,

[your name]

Following confirmation that the relay to address has been updated in MailDefender all mail sent to that domain will now relay directly to your Office 365 account.

Note: when your MX records are updated, the following points must be considered:

- Any user who has not reconfigured their client (mobile device or PC) will not receive new mail.
- Any user/group/contact/address which has not been created in Office 365 will reject email sent to it.

9 Setting up Mobile Devices

Although official support is not offered for mobile devices, a general configuration wizard has been supplied for the most common handsets: <http://help.outlook.com/en-us/140/dd936215.aspx>. For

any additional guidance on setting up your device you should refer to your manufacturer's handbook or mobile network operator.

10 Support and the future

Should you require any support please contact your vendor.