NYSeMail Office 365 Administration Guide for Agencies

NYSEMAIL OFFICE 365 ADMINISTRATION GUIDE FOR AGENCIES - DRAFT V5 1 (2)NYSEMAIL OFFICE 365 ADMINISTRATION GUIDE FOR AGENCIES - DRAFT V5.DOCX

February 12, 2014January 9, 2014

Office 365 Overview

What is included

All users on Office 365 will have a 50GB mailbox with unlimited archive using the Exchange Online Archive (EOA). Users also have access to 5 licenses of Office 2013 that they can stream to up to five devices. This includes Word, Excel, Outlook, PowerPoint and Access. This means that as long as a user has a valid NYSeMail mailbox in Office 365 they can download and install Office 2013 on up to 5 devices. They will also have access to SkyDrive Pro, which includes 7GB of storage and syncs your home folder with your personal SharePoint site (formally called 'MySite'). Users can continue to use their Outlook client to access their mailbox, as well as Outlook Web Access (OWA).

Software Requirements

Please refer to the following URL for software requirements:

http://community.office365.com/en-us/wikis/manage/office-365-client-system-requirements-policy.aspx

Message Limits

Please refer the following URL for message and recipient limits:

http://help.outlook.com/en-us/dd630704.aspx

Provisioning

Provisioning will be controlled by the agency's Active Directory. For agency's using Webstar, they will continue to do so. For agencies using taskpad, this will no longer be available.

Archive and Retention Policy

The new archive system is Exchange Online Archive (EOA). The archive will appear as a folder in both Outlook and OWA. Currently the Statewide default retention policy is 90 days. This does not apply to calendar items, notes or contacts. If a message is deleted from the mailbox, it goes to the deleted items folder as part of the Active Mailbox. Once the Deleted Items folder is emptied, the messages go to the Recover Deleted Items folder for 30 days. The user can still recover the message at this point. *Please note that at this point the item is no longer visible within the mailbox or the archive*.   After 30 days the mail item is purged and cannot be recovered. Once an item has reached the end of its retention period it is placed in the Recover Deleted items folder and is recoverable to 30 days. After 30 days the mail item is purged and cannot be recovered Please see the Delete versus Purge section for more information.

All PST files that the user currently has will still be accessible using their Outlook client with Office 365. A user can choose to use the Outlook client to move items from their PST to their mailbox or archive. Please keep in mind that all mail in the system folders will be subject to the 90 day retention policy.

If a user has mail that they want to keep past the 90 day retention period:

1. Users with a Retain folder can their folder. If they don't have a retain folder, they can create a folder in their Archive or in their Mailbox that is at the same level as the Inbox
2. Move the message into the folder. Currently the Retain folder, the Archive or top level folders do not have a retention period so items located there (including all subfolders) are kept indefinitely.

Office 365 allows the use of "tags". The alternative tags are still under review by Counsel's office and the Chamber.

Delete versus Purge

There is a distinct difference between these two terms when discussing Office 365. When a message or mailbox is deleted it is still recoverable. Once an item has been purged, *it is no longer possible for NYSeMail or Microsoft to recover the data*.

OST File Sizes

It is important to be aware of OST and PST file sizes. To determine the size:

1. In Outlook, right-click the mailbox in the navigation pane, and then click **Properties**.
2. Click **Folder Size**, and then note the **Total size** value on the **Local Data** tab.

Total size (including subfolders):	482696 KB

3. Open the Outlook system folder by opening the following folder path, depending on the operating system:
    - Windows 7 or Windows Vista: *%userprofile%*\AppData\Local\Microsoft\Outlook
    - Windows XP: *%userprofile%*\Local Settings\Application Data\Microsoft\Outlook

Depending on the version of office you are running, your agency may need to restrict the size of the OST and PST files. For more information, please refer here.

Provisioning New Objects

Office 365 Admin Center and Exchange Admin Center

Office 365 Admin Center is a dashboard that provides an overview of the service health of the components bundled in the NYSeMail tenant. The Exchange Admin Center (EAC) is the web-based management console you use to manage the items related to email that you can't manage by using the Office 365 admin center. For example, setting permissions, manage SMTP addresses, etc. Sign in with your email address, the same as accessing OWA.

To sign into the On-line Portal

Use your primary email address (UPN) and associated password to access the portal. When you click in the password field you should be redirected to the screen below. Enter your password.

The Office 365 will open

Exchange Admin Center

The Exchange admin center (EAC) is the web-based management console you use to manage the items related to email that you can't manage by using the Office 365 admin center.

To access the Exchange Admin Center access the following URL:
https://outlook.office365.com/ecp
Once in the Exchange Admin Center, you will need to search for the user. To do this

1. Click and enter the user name in the search box.

2. Click to begin the search.
3. Once you have successfully located the user, double click on the name, complete your changes and then click save. Any informational field that is populated from your AD cannot be modified in the admin center.

User Mailboxes

All user mailbox accounts are created from an account in the agency's Active Directory. Admins create a user in their Active Directory. For this account to be provisioned a mailbox, it must have a UPN suffix that is the same as the primary SMTP domain. If not, the Admin will need to change the UPN suffix to match the user's primary SMTP domain. This alternate UPN routing suffix must be added to the Active Directory forest per guidance from the ITS Active Directory

group. Within 24 hours NYSeMail will detect the new account and create the corresponding mailbox in Office 365.

Resource (Shared, Room and Equipment) Mailboxes

All resource (shared, room and equipment) mailboxes are 10GB with no archive. To create a resource mailbox, you will need to log into the Exchange Admin Center:

1. Select recipients and then the type of mailbox you want to create. Room and equipment mailboxes are created under resources

    Exchange admin center

    | recipients | mailboxes groups resources contacts shared |

2. Click the New button

    +▾

3. A drop down menu will appear

    +▾ ✎ 🗑 🔍 ♺ ⋯

    Room mailbox
    Equipment mailbox

4. Select the type of room you want to create and a dialog box will appear

    new room mailbox

    *Room name:
    _____

    This name will appear in the address book. To make it easier for users to find rooms, use a consistent naming convention.

    *Email address:
    _____ @ abc.state.ny.us ▾

    Location:
    _____

    Phone:
    _____

    Capacity:
    _____

5. In Office 365, the default option is that all resource, (shared, room and equipment) mailboxes will be configured to AutoAccept meeting invitations. You can select delegates

who can accept or decline booking requests.

6. Once you have configured the mailbox as needed, click Save. You can always make modifications later

Groups

Office 365 calls distribution list Distribution Groups. In Office 365 you can create 3 types of groups: Distribution, Security and Dynamic Distribution Groups. A distribution group is a collection of two or more people that appears in the shared address book. When an email message is sent to a distribution group, it goes to all members of the group. A security group is created to grant a certain group of people access to resources. Dynamic distribution groups are created by administrators to allow communication with specific users based on current user metadata. Instead of adding users to static groups, you update the data on each user, and then use filter criteria to determine who is in the dynamic distribution group. The recipients are determined when the message is sent to the group.

To create a group, you will need to log into the Exchange Admin Center:

1. Select recipients and then the type of mailbox you want to create. Room and equipment mailboxes are created under resources
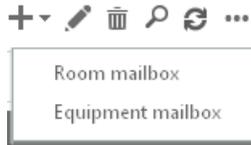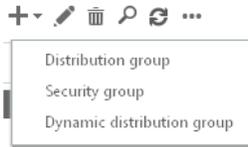
Exchange admin center

recipients   mailboxes   groups

2. Click the New button

3. A drop down menu will appear

   Distribution group
   Security group
   Dynamic distribution group

4. Select the type of group you want to create and the new group box will appear. Use the naming convention of *agency*.DL.groupname.

   new distribution group

   *Display name:

   This name will appear in the address book and on the To and Cc lines when email is sent to this group. The display name should be user-friendly so that users will recognize what it is.

   *Alias:

   *Email address:
   @ dfa.state.ny.us

   Description:

   *Owners:
   + −

5. By default you will be the owner so if you are not the owner, make sure you specify who is. The owner will manage distribution and security groups from the Outlook Client or OWA. Please refer here for distribution group restrictions.

6. Dynamic distribution group membership is controlled by the rules specified in the group properties.

   Members:
   *Specify the types of recipients that will be members of this group.
   ⦿ All recipient types
   ○ Only the following recipient types:
      ☐ Users with Exchange mailboxes
      ☐ Mail users with external email addresses
      ☐ Resource mailboxes
      ☐ Mail contacts with external email addresses
      ☐ Mail-enabled groups

   Select one
   State or province
   Company
   Department
   Custom attribute 1
   Custom attribute 2
   Custom attribute 3
   Custom attribute 4
   Custom attribute 5

   Mem
   rules
   ✖ Select one

   add a rule

   Security group will be created in Exchange Admin Center. It needs to have a name of agency.grp.groupname. It must have a display name in the display name field and an email address in the email field. This group can then be used for assigning security permissions. Group nesting within Exchange Online is now supported too, as long as the nested group is also named *agency*.grp.group2name and is also a cloud object.

ListServs

The provisioning of a ListServ will remain a work request to NYSeMail.

Contacts

Contacts can now be created in the Exchange Admin Console.

1. In the Exchange Admin Center, Click recipients, then contacts
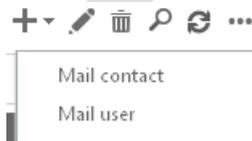
Exchange admin center

recipients   mailboxes groups resources contacts

2. Click the New button
3. *A drop down menu will appear*

Mail contact
Mail user

Note: Mail users are similar to mail contacts. Both have external e-mail addresses and both contain information about people outside your Exchange Server 2010 organization that can be displayed in the global address list (GAL) and other address lists. However, unlike a mail contact, a mail user has Active Directory logon credentials and can access resources

4. *Choose mail contact and fill in the required information. Please note that is the contact already exists you will not be allowed to create it again. If you try to create a mail user, you will get an error.*

new mail contact

First name:

Initials:

Last name:

*Display name:

*Alias:

*External email address:

5. *Click Save*

Managing Existing Objects

To manage items in Office 365, LAN Admins Active Directory and the On-line Portal. You will need to log into the Exchange Admin Center:

1. Select recipients and then the type of mailbox you want to create. Room and equipment mailboxes are created under resources

Exchange admin center

| recipients | | mailboxes groups resources contacts shared |

2. Click and enter the user name in the search box.

3. Click to begin the search.
4. Once you have successfully located the user, double click on the name, complete your changes and then click save. Any informational field that is populated from your AD cannot be modified in the admin center.

Rename Mailboxes

Change the user's name in your agency Active Directory. Within 24 hours NYSeMail will detect the change and update the mailbox.

Resource Mailboxes

There are two methods to manage resource mailboxes

Legacy Mailboxes

Legacy mailboxes are mailboxes that existed in NYSeMail before your agency was migrated to the cloud. To manage Exchange related properties will be changed in the Exchange Admin Center. To manage Active Directory related items, you will continue to use the AD Taskpad. The Exchange Taskpad will no longer work. Please see the table below with clarification on which tool to use:

Property	Tool To Manage
Full Access/Send As Permission	Exchange Admin Center
MailTip	Exchange Admin Center
Forwarding	Exchange Admin Center
Delivery Restrictions	Exchange Admin Center
Email Address	Taskpad
Member Of	TaskPad
Name	Taskpad
Contact Information	Taskpad
Organization	Taskpad

New Shared Mailboxes

All properties are managed in the Exchange Admin Center.

Manage Group and Distribution List Memberships

There are two methods to manage groups and Distribution Lists.

Legacy Groups and Distribution Lists

Legacy groups and distribution lists that existed in NYSeMail before your agency was migrated to the cloud. To manage Exchange related properties you will use in the Exchange Admin Center. To manage Active Directory related items, like membership, you will continue to use the AD Taskpad. The Exchange Taskpad will no longer work. Please see the table below for more clarification:

| Property	Tool To Manage
Name, description	Taskpad
Owner	Taskpad
Members	Taskpad
Delivery Restrictions	Exchange Admin Center
Send As/ Send on Behalf	Exchange Admin Center
MailTip	Exchange Admin Center

New Groups and Distribution Lists

All properties are managed in the Exchange Admin Center.

Forward emails to another email address

This will be managed in the Exchange Admin Portal.

1. Access the Admin Center. Click Recipients
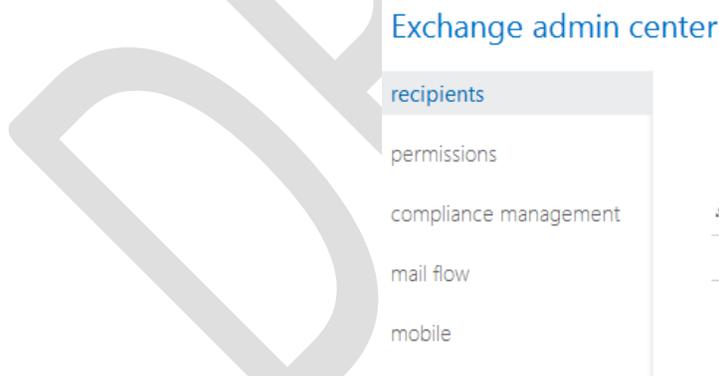
2. Locate the mailbox you need to modify and double click on it.

Click Mailbox Features

general

mailbox usage

contact information

organization

email address

▸ mailbox features

member of

MailTip

mailbox delegation

3. Under Mail Flow click view details

Mail Flow
Delivery Options
Delivery options control forwarding and recipient limits.
View details

4. Check the box to enable forwarding and select the account you want to forward the mail to. It can only be forwarded to another NYSeMail object. This does include contacts. **However, we recommend you only forward email to another NYSeMail mailbox because forwarding mail to an address outside of NYSeMail is not encrypted.**

Help

delivery options

Forwarding Address
Forward email to the following recipient.
Learn more

☐ Enable forwarding
Forward email to the following recipient:

[   ] browse...

Use this setting to forward
email messages sent to the
user to another recipient.

☐ Deliver message to both forwarding
address and mailbox

Recipient limit
☑ Maximum recipients:

500

Placing a user on Legal Hold

We are not using Litigation hold, we are now using In-Place Hold. NYSeMail Admins do not have the rights to do this. This must be done by a designated admin in the agency.

1. If you have the rights, go the Exchange Admin Center and click compliance management

2. Click on-place eDiscovery & hold

3. Click Edit an existing hold, click
4. Click New to add a new hold
5. Enter a name and description then click Next.
6. Add the mailbox to be placed on hold
7. If you have eDiscovery rights, you can specify the search criteria. Click next.
8. Check the box to Place content matching the search query in selected mailboxes on hold.
9. You can specify hold indefinitely or for a number of days
10. Click Finish

Note: If a user does not have rights to do any of this they will get an error at this time

Hide a user in the GAL

This can only be performed in Exchange Admin portal for accounts that reside in the cloud (i.e. shared mailboxes).
Once in the Exchange Admin Center, you will need to search for the user. To do this

1. Click and enter the user name in the search box.

2. Click to begin the search.
3. Double click on the name Select General and check the box to hide from address lists

Any other mailboxes will require a work request to NYSeMail

Update the GAL entries, Agency information, or Notes Field for User Mailboxes

Update the fields in the agency Active Directory. Within 24 hours NYSeMail will detect the change and update the mailbox.
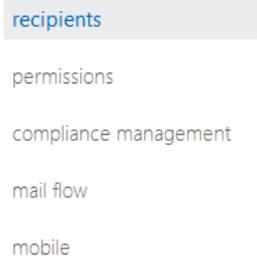
Managed Folder Policy

Office 365 does not use managed folder policies, it uses Tags. See Archive and Retention Policy section for more information.

Restrict messages from a user or group

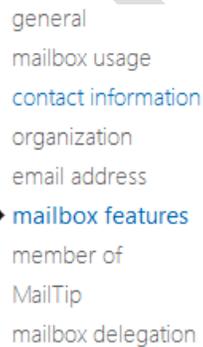1. Access the Exchange Admin Center. Click Recipients

Exchange admin center

recipients

permissions
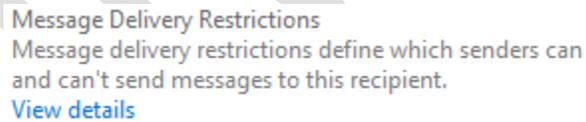
compliance management

mail flow

mobile

2. Locate the mailbox you need to modify and double click on it.
3. Click mailbox features

Click Mailbox Features

general

mailbox usage

contact information

organization

email address

▸ mailbox features

member of

MailTip

mailbox delegation

4. Click View details under Message Delivery Restrictions

Message Delivery Restrictions
Message delivery restrictions define which senders can
and can't send messages to this recipient.
View details

5. Configure the Accept and/or Reject properties

message delivery restrictions

Accept messages from:
- All senders
- Only senders in the following list

DISPLAY NAME ▲

☐ Require that all senders are authenticated

Reject messages from:
- No senders
- Senders in the following list

DISPLAY NAME ▲

6. Click OK and then Save

Send As, Send on Behalf of, or Full Access Permissions

1. Access the Admin Center. Click Recipients

Exchange admin center

recipients

permissions

compliance management

mail flow

mobile

2. Locate the mailbox you need to modify and double click on it.
3. Click Mailbox Delegation

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

4. Under Send As, Send on Behalf or Full Access click ✚
5. Find the user, Click and then OK.
6. Click Save

Restrict messages from a user or group

1. Access the Admin Center. Click Recipients

Exchange admin center

recipients

permissions

compliance management

mail flow

mobile

2. Locate the mailbox you need to modify and double click on it.

Click Mailbox Features
general
mailbox usage
contact information
organization
email address
▸ mailbox features
member of
MailTip
mailbox delegation

3. Click View details under Message Delivery Restrictions

Message Delivery Restrictions
Message delivery restrictions define which senders can
and can't send messages to this recipient.
View details

4. Configure the Accept and/or Reject properties

message delivery restrictions

Accept messages from:
- ● All senders
- ○ Only senders in the following list

+ −

DISPLAY NAME ▲

☐ Require that all senders are authenticated

Reject messages from:
- ● No senders
- ○ Senders in the following list

+ −

DISPLAY NAME ▲

5. Click OK and then Save

Enable or Disable Active Sync and/or OWA for a domain

When the agency is migrating to NYSeMail, this process will be established at the time. If this is requested after migration, it will require a service request.

Enable or Disable Active Sync and/or OWA for a user mailbox

1. Access the Admin Center. Click Recipients

Exchange admin center

recipients

permissions

compliance management

mail flow

mobile

2. Locate the mailbox you need to modify and double click on it.

Click Mailbox Features

general

mailbox usage

contact information

organization

email address

▸ mailbox features

member of

MailTip

mailbox delegation

3. Select the service you want to modify under Mobile Devices

Mobile Devices
Disable Exchange ActiveSync
Disable OWA for Devices
View details

4. If you want to see what devices have linked to their mailbox, click view details.
5. Click Save

Add or remove users from a Distribution List

This process has not changed. The Owner(s) of the Distribution List will manage the list from the Outlook Client.

Set Primary SMTP address for a Name Change for User Mailboxes

Update the user name in the agency Active Directory. Within 24 hours NYSeMail will detect the change, update the user name and SMTP address.

Set Primary SMTP address for Shared, Resource or Equipment Mailboxes

1. Access the Admin Center. Click Recipients

Exchange admin center

recipients

permissions

compliance management

mail flow

mobile

2. Select Shared

mailboxes resources contacts **shared**

3. Locate the mailbox you need to modify and double click on it
4. Click Email address

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

5. Click on the pencil icon to edit

6. To add another SMTP address, click the + icon

Set Primary SMTP address different from Name for a User Mailbox

This require a work request to NYSeMail.

Reconnect a deleted mailbox

Please remember that you only have 30 days to reconnect a deleted mailbox. The process for reconnecting Mailboxes depends on the functional level of the Agency Domain.

For HSEN customers, please continue to request OFTSEC to restore accounts.

Forest Functional Level is 2008

1. First you need to determine if the mailbox can be restored. Access the Office 365 Admin Center and click users and groups

Office 365 admin center

dashboard

users and groups

2. Select deleted users

active users   deleted users   security groups   delegated admins

3. Click the search button   and enter the name of the user you want to restore and press Enter

User Name Here

4. Restore the account in the Agency Active Directory and allow for a sync cycle to complete.
5. Once the sync cycle is complete, the mailbox will automatically be restored.

Functional forest level is lower than 2008

Option one is to use a third party tool to restore the account

Option two:

1. Determine if the mailbox can be restored. Access the Office 365 Admin Center and click users and groups

Office 365 admin center

dashboard

users and groups

2. Select deleted users

active users   deleted users   security groups   delegated admins

3. Click the search butt...   and enter the name of the user you want to restore and press Enter

User Name Here

4. If the mailbox is listed there, submit a request to NYSeMail to have the Account restored.
5. Create a new account in the Agency AD with the correct UPN.
6. Once the Agency and NYSeMail accounts have been restored, the Sync process will need to run. At that point, the mailbox should be reconnected.
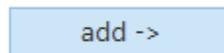
Give additional users manager permission for DLs

Locate the group in the Exchange Admin Center, and double click on it.

1. Click ownership on the left
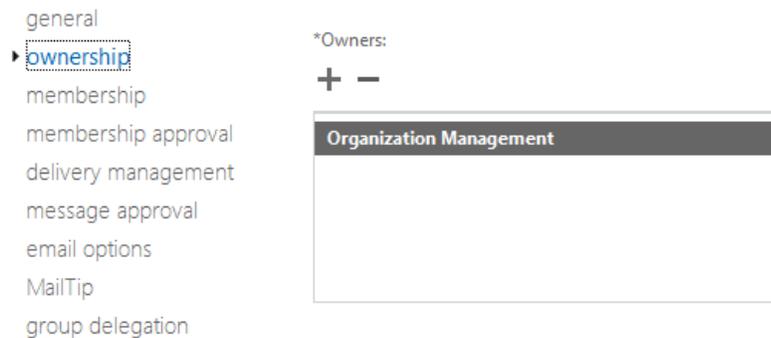
2. Click the Add button
3. Locate the user you need to add as owner and click add

4. Once you have added all the owners, click ok

Wiping an Active Sync Device

Users can access OWA and wipe their active sync device. If they do not have access to OWA, they have 3 options:

1. They will need to submit a request to their helpdesk
2. Contact their LAN Admin
3. If they have rights, they can open a work request to NYSeMail

Blackberry devices

NYSeMail has added BlackBerry Servers for Office 365. You will be using the BlackBerry 10 Admin console to manage BlackBerry devices for Office 365 mailboxes. You will continue to use your ADM account and the Remote Web App to access the Console. The functionality for managing users in the new console is the same as it was in Blackberry 5 Admin Console. Please refer to the BlackBerry 10 Admin guide for specific steps.

De-provision Objects

Delete Account and Mailbox

When you delete the account in your Active Directory, the mailbox will be deleted from Office 365 on sync cycle. You will have 30 days to restore the mailbox. After 30 days it will be purged and there is NO WAY for NYSeMail or Microsoft to restore the mailbox. Please see Delete versus Purge section for more information on the difference between delete and purge.

Delete Mailbox and retain Account in Active Directory

There are 2 methods for handling this requirement. You can either move the account to an OU that is not synced with FIM, or change the UPN associated with the account, to a non-routable

UPN. The mailbox will be deleted from Office 365 on sync cycle. You will have 30 days to restore the mailbox. After 30 days it will be purged and there is NO WAY for NYSeMail or Microsoft to restore the mailbox. Please see Delete versus Purge section for more information on the difference between delete and purge.

Retain mailbox and Account while removing access

Disable the Account in your active directory. The mailbox will remain, however the user will no longer be able to access the mailbox.

Troubleshooting Tips
User cannot login to Office365

If the user us getting prompted for credentials in Outlook, the first step in troubleshooting will be to verify if it is a mailbox or a client issue. Have the user try to access OWA. If they can access OWA then the issue is with the client. If the user cannot access OWA you will need to check the following:

1. In the Agency AD check what the user's UPN is set to. I needs to be a valid internet routable UPN, that typically matches their email address (See example below). If it does not, you will need to change it and allow for replications. Please note that occasionally third party apps write to this UPN field and will add illegal characters, like apostrophes, and these will cause an issue. Illegal characters need to be removed.

User logon name:

Sandra.Kovalchick	@its.ny.gov ▼

Webstar admins will check for this information in Webstar.

2. Log into Exchange Admin Center and check the user ID for the account in issue. It should match what is found in Agency AD. If they do not match you will need to open a ticket with the Network Operating System team to have this fixed.

User ID:

Sandra.Kovalchick@its.ny.gov

3. If both of these items are correct, you will need to open a ticket with NYSeMail.