



## PKFI takes to the Cloud with Microsoft® Office 365™

How PKFI benefited by moving to Microsoft's online office solutions and worked with Blue Sky to make it happen.

# The end of the road for traditional mail and document storage services?

### Objectives:

- Relocating staff
- Reduce costs

### Challenges:

- Temporary offices
- Poor connectivity
- Large volume of data migration
- Complex Domain Name changes

### Microsoft solutions used:

- Office 365 Enterprise E3 Package
- Office installed on laptops
- Skydrive for personal file storage
- Sharepoint server for shared documents
- Intranet developed for SharePoint server
- Lync Online

PKF International supports a global network of independent accounting firms. Originally the UK firm provided all of the key computing and communication services for PKFI. Consequently, when they left the network, PKFI were without IT infrastructure. This change required an urgent migration of content and provisioning of new IT infrastructure, a significant task for Phil Broadbery, and his first challenge as the new CIO.

“Having to find a complete replacement for all our IT hardware and services: email, document storage, website and communications quickly was certainly daunting, but it provided us with an ideal opportunity to take advantage of public cloud services.

“We compared two rival services: Google Apps and Microsoft's Office 365. For us the choice was obvious. We already had many critical documents stored within Microsoft Office format and we wanted a robust IP telephone system.

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*Phil Broadbery | CIO PKFI*

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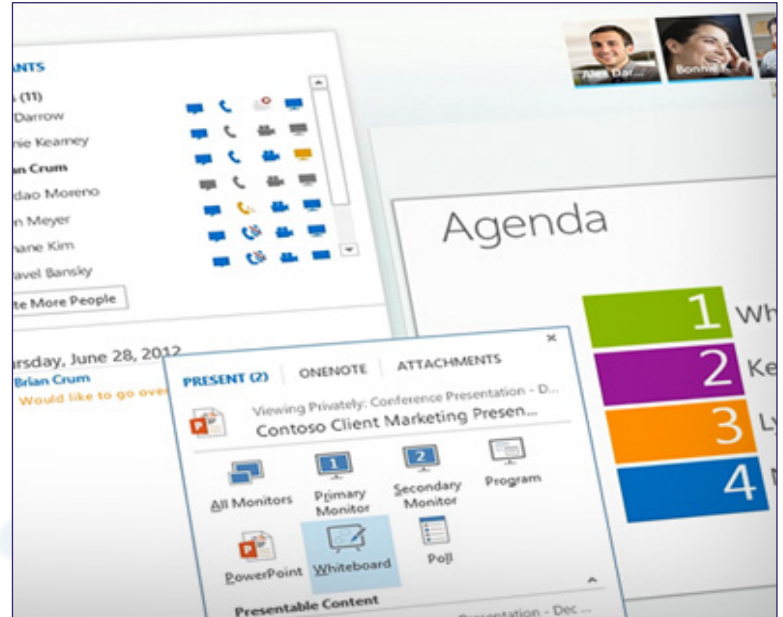
“We ended up coming down to Office 365. Every time. We came up with the “Three F’s to explain.

- **Familiarity** - everyone in the office and most people within the network use Word, Excel, Outlook. So Office 365 had that familiar feel.
- **Flexibility** – Specifically of licenses. Google Apps is \$50 per person per year as a flat fee. With Office 365 we could have one license type that gave people all Office licenses and email and Lync – such as an E3 license, or we could give them an E1 if they already had Office, which was cheaper, or for our SharePoint collaboration sites we could invite contacts in as an external user, which is free.
- **Future features** - we had this initial requirement to get email and document management to be sorted out for the international office. We knew we had a whole load of requirements for collaboration features, templating and so on. Basically the features SharePoint provided. So with Office 365 we had those features.

### Why choose Blue Sky?

The complete replacement of a company’s business critical systems is a major undertaking. Was Broadbery concerned about Blue Sky’s abilities to handle all of this?

“Because of Blue Sky’s technology expertise I could trust them to manage our complex needs of domain management, migration from Domino and document migration to SharePoint. I had the confidence to let Blue Sky’s experts just get on with it. So for me, as Project Manager, it was very low maintenance. I didn’t need to sit in every meeting and check what was being said. I had the



confidence that Blue Sky could do it. Nothing got lost in translation between the old system suppliers or technologies. The email migration was pretty smooth when we got the bandwidth in place.

### Moving to Office 365 with Blue Sky

Blue Sky’s Patrick Lavan, responsible for Messaging & Collaboration, explains how the project was tackled: “PKF UK Limited was an existing customer of Blue Sky Hosting. In the past we had provided an IBM Domino server for mail and document storage. As implementing Microsoft

“As implementing Microsoft Exchange and Office 365 was already a solution offering, our team was best positioned to help”

*Patrick Lavan | Messaging & Collaboration, Blue Sky Hosting*

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Exchange and Office 365 was already a solution offering, our team was best positioned to help with the transition from on-premise mail and file servers to the Microsoft Office 365 cloud system.

“PKFI’s old IT infrastructure had to be completely replaced, they needed a new website and they needed a completely new email service and document management system. Normally this is pretty straightforward, however the customer had to move to temporary offices. So we couldn’t rely on the Internet connection and what we were doing was going to have to be portable, another good reason to go to Office 365 in the public cloud.”

### Moving Mail and Documents in the Cloud with Office 365 and SharePoint

All of the important business documents were stored in a document management system. Lavan explains how Blue Sky went about exporting around 50Gb of data: “All the email was stored in the old onsite MS Exchange email PST files. We had one per person to migrate onto the cloud.

“The Outlook PST files needed to be imported in the cloud, and so did the documents in the old Document Management System. They had to be shifted into the new public cloud version of SharePoint, which was to become PKFI’s Intranet.”

Once the transfer was complete along with the Intranet page development created by freelance developer Nigel Price and the team at ClerksWell, the users could be set up and when ready they would be able to log into Office 365 and they would have their own personal space - via SkyDrive Pro and access the shared

document area of the SharePoint Intranet.

PKFI decided to standardise on Windows 7 for all desktops and laptops. Each laptop needed to be configured to have Office 365 installed. A trial version of Office 365 had been previously created, and once it was converted to an active subscription, all the users’ accounts were ready to be setup. Blue Sky managed the setup process of the laptops, by first logging into each account and then downloading the Office 365 software. This means that the latest version of all Microsoft’s office suite was installed and meant all the laptops were consistent.

“There’s no longer any need to keep a copy of the Office Install discs and lose them or having to find them”, explained Blue Sky’s Lavan. “We also mapped the ‘S’ Drive to the Intranet shared space on the SharePoint service that had 50Gb allocated to the group for document storage. This was a challenge. The problem was that the drive mappings were not reliable, and the Internet connection was poor. The second reason; mapping using SharePoint with Internet Explorer 10 at the time on Windows 7 didn’t work properly. So we had to downgrade to IE9 on all machines – but, thankfully, IE10 now supports it. The laptops are all 64bit machines.”

### Data Security on the Laptops

For data security, Blue Sky installed TrueCrypt on-the-fly disc encryption so that the entire laptop was secure.

### Domain and MX Record Management

Because of the split from the UK firm, PKFI had to setup a new domain but not lose touch with anyone sending email to staff on the old email addresses. Again, Blue Sky’s Lavan had the answer, “Everything got moved, both the mail server and the domain name – at the same time”

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recalls Lavan. “We moved the MX (Mail Exchange) record for pkf.com to point to the Office 365 server. Previously it was pointing to the Mimecast service - the mail had been forwarded to an alias. PKFI.co.uk was registered at the time so they had a domain temporarily and then moved over the pkfi.com domain. This allowed staff to receive email to @pkfi.com as usual, however, outbound email traffic was temporarily sent via Mimecast and the UK division’s email was unaffected. This allowed the website and email to be migrated without interruption to either company’s websites or email services.”

### Importing Outlook Data to Office 365

All the Outlook PSTs needed to be imported into the cloud. The user’s original PST was imported into the Office 365 version of Outlook on the laptop and then the email data automatically synchronised over time with the public cloud service. Lavan found this frustrating but more reliable than the import tool: “We could have installed an import utility but we’ve found them unreliable and we had internet connection speed issues so this was the most reliable way of getting everything synchronised. Another problem we had was with contacts, we had to develop some scripts to import the data but, again, the problem was solved and worked well.”

### Communications

For each individual Outlook account, Microsoft’s Business Communication Tool called Lync was enabled. This allowed for social collaboration as well as Voice over IP and conferencing

### In Summary

The benefit of using the E3 Enterprise Office 365 package was that PKFI exceeded their users’ expectations of functionality. CIO, Phil Broadbery is a happy man:

“People are pleased with email services – it’s now all under our control. The new version of Outlook 2013 has been well received. The E3 license provides 5 installations of Office per user which is perfect for our mobile workforce.

“The collaboration capabilities of SharePoint and Lync Online are just starting to be realised. We’ve had some good success with Lync – we’ve had board meetings held exclusively on Lync: 11 people in 10 different countries connecting to a 2.5 hour meeting.

“Lync is much more than Skype like services for us, the integration with Outlook and SharePoint enables the tool to slip into our working practices plus provides the enterprise voice controls that we need.

“What we’ve done is take control of our own environment. And we’ve got a platform that gives us all these new comms and collaboration capabilities to start rolling out advanced services that really benefit our members.

“Lync is saving us money - no doubt about it. It can easily save the Office 365 subscription cost and we’re talking more within the organisation. I had 3 hours on the phone this morning to the Gold Coast - if that was a land line that would have been very expensive. We’d be spending £300-400 a month. My Lync subscription costs a pound!”



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**For a fraction of the cost, PKFI were able to provide additional features such as compliancy and eDiscovery. Users can search for data across all their email and document stores. Data loss is prevented and document archival means PKFI has improved the quality of their own internal processes and engagement with their members worldwide.**

**Staff can now access data anywhere through their own company secure laptops or through the new Windows Tablet and Windows Mobile phones. It means that users can rely on IT now and in the future. By using Lync, PKFI staff can communicate with members all over the world in an environment that fully integrates with Outlook, Office apps and SharePoint. This provides integrated internet calling which saves all firms money.**

### Find out more

If you would like to discuss your requirements and see how Blue Sky can help your organisation make the move to Microsoft's Office 365 cloud, visit [www.bluesky.co.uk/move](http://www.bluesky.co.uk/move).