



Business Productivity Online Standard Suite Introduction to Transition

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Introduction

In 2011, Microsoft will make generally available worldwide a major service update to the Business Productivity Online Suite (BPOS). The service update, called **Microsoft Office 365**, will include new features and offerings, architectural changes to the underlying Microsoft Online Services platform, and an upgrade of datacenter server applications based on Exchange Server 2010, SharePoint Server 2010 and Lync Server 2010 (formerly known as Office Communication Server).

The transition from BPOS to Office 365 does not represent a new version or product for Microsoft Online Services customers. Office 365 is an evolution of BPOS. The transition does, however, represent a major architectural shift for Microsoft's Online Services architecture from on-premises servers adapted to the cloud, to a fully-rearchitected service-oriented design. This is the reason that there are some impacts in terms of system requirements and configuration of optional features such as federated identity and rich co-existence.

One of the key values of Microsoft Online Services is that **customers are not required to re-deploy or upgrade server software, nor are they required to migrate data** when new features and capabilities are available or services are updated. This will hold true for the transition process that enables the new features and capabilities of Microsoft Office 365. **All server infrastructure updates and data migration will be handled by Microsoft.** Microsoft is committed to ensuring that **the transition** from BPOS to Office 365 is simple for customers, **will minimize disruptions** to end-users, and will **maintain the security and integrity of customer data** at all times.

The underlying 2010 server technology that drives Office 365 was architected to run as a service in the cloud and to enable seamless updates to the service. This new architecture means that **future major service updates** to the Office 365 service **should have an even lower overall impact on customers** than the transition from BPOS to Office 365.

This guide includes information that existing BPOS customers will need to prepare for the transition from BPOS to Office 365. Trial customers and customers who have not yet deployed production data on BPOS should consult "



[Appendix - Transition Scenarios for Trial and Undeployed Customers](#) first.



Key Product Concepts

Product	Description
Office 365	A suite of hosted communication and collaboration services that includes Exchange Online, SharePoint Online and Lync Online
Microsoft Office Client or "rich client"	Describes Microsoft Office client software that is installed on end-user computers, including Office 2010, Office 2007 SP2, Office 2010 Pro Plus
Microsoft Office 2010 Professional Plus	A subscription licensing model for Microsoft Office 2010 client software Office 2010 Professional Plus subscription licensing is not offered in all Office 365 subscription plans
Office Web Apps	A browser-based version of the Microsoft Office client that allows end users to read and edit Microsoft Office documents. Office Web Apps does not provide all the capabilities of the Microsoft Office rich client. Office Web Apps document reading capability is part of SharePoint Online and is available in all SKUs. Not all SKUs offer a version of Office Web Apps with the ability to <i>edit</i> documents in a browser.



Planning Checklist

The following tables summarize high-level planning areas for the transition from BPOS to Office 365:

Planning Item	Description
Start learning about new features in Office 365	<p>All of the services within the Office 365 suite have significant new features and functionality.</p> <p>For a more detailed discussion of the features and benefits of Office 365, please refer to office365.microsoft.com.</p>
Understand new Office 365 products	<p>Visit office365.microsoft.com/office365-plans.aspx to learn about the subscription plans available to the enterprise, small businesses and education.</p>
Understand Office 365 System Requirements and the Transition Process	<p>For the most up-to-date information on transition, please visit microsoft.com/online/transition-center.aspx.</p> <p>This document discusses the system requirements for Office 365 and the transition process in detail.</p>
Learn about Lync and Lync Server 2010	<p>Visit lync.microsoft.com to start learning about Lync Online and how the conferencing experience will change with the transition from Live Meeting to Lync Online</p>



Optional: Start learning about federated identity and ADFS

Office 365 will support single sign on via federated identity. You will need to deploy Active Directory Federation Services on premise to establish a federation relationship with Microsoft Online Services and provide true single sign-on capability.

Visit onlinehelp.microsoft.com/en-us/office365-enterprises/ff637606.aspx for more information.

Optional: Start learning about rich coexistence in Exchange Online with Office 365

Visit technet.microsoft.com/library/gg577584.aspx to learn more about rich coexistence for organizations with both on-premise and cloud Exchange Servers.

Enabling rich coexistence will require that you deploy an Exchange Server 2010 CAS server role on premises which will allow Exchange Online and your Exchange Server infrastructure on-premises share free/busy information between users with an online mailbox and users with an on-premises mailbox.



BPOS to Office 365 Transition Overview

Transition Roles and Responsibilities

Microsoft Responsibilities

- Inform the technical and administration contacts (as listed in your BPOS tenant) of the transition
- Work with you to schedule a transition date
- Provide you with information and guidance about the transition
- Prevent any disruption to email flow during transition
- Migrate any and all customer data as required for a full transition

Your Responsibilities

- Be responsive to Microsoft requests to schedule a transition date
- Update end-user computer software to meet the system requirements
- Configure end-user computer software if required
- Re-configure end-user Active Sync devices
- Inform and train your end-users as needed
- Optional: deploy an on-premise Active Directory Federation Services server if you choose to implement ADFS-based single sign-on.
- Optional: deploy an on-premise Exchange Server 2010 CAS role if you have a hybrid on-premise/cloud Exchange deployment and want to share free/busy and other information across servers

Key Areas of Change

The table below summarizes key differences and areas of change:

Area of Change	Description
SharePoint Online Deskless Worker subscriptions will move to SharePoint Online Kiosk	Please see the SharePoint Online Deskless Worker Changes section in this document.
The transition from Live Meeting to Lync Online will begin	With the transition to Office 365, you will begin the transition from Live Meeting and Office Communications Online to Lync Online, the next generation of Office Communications Online with unified conferencing features. Please see the Live Meeting Transition to Lync Online

New System Requirements

section in this document

You may need to make the following updates to end-user desktops:

- Office Client: Office 2007 SP2 or Office 2010 required
- Browser: Internet Explorer 7 or higher.
- Instant Messaging: Lync 2010 required (Office Communicator is no longer supported and must be removed)
- Service Connector:
- BPOS Sign In applications no longer supported and must be uninstalled
- Install Microsoft Online Desktop Upgrade

Please see the Understanding System Requirements section and [Office 365 System Requirements](#) appendix for more details.

New Portal Experiences

The Microsoft Online Customer Portal and the Microsoft Online Administration Center will be combined to become the Microsoft Online Portal with new user interface experiences. Please see the [Features and Benefits of Office 365](#) section in this document for more details.

URL changes for OWA and Portals

The URLs for Outlook Web App, the administration portal, and the end-user portal will change.

Sign-In application replaced by Microsoft Online Desktop Upgrade

The Microsoft Online Desktop Upgrade is a run-once tool which will automatically configure and update end-user computer for Office 365.



Availability and Timeline Overview

Microsoft understands that you need the flexibility to determine when your organization will enable significant updates to the online services you purchase from Microsoft. You will have up to twelve (12) months, beginning several months after the Office 365 launch, to transition to the new service.

The following table provides a high-level timeline of key milestones for Office 365.

What	Availability Date	Comments
Beta of next major service update	Spring 2011	For existing customers, the Beta is only intended as a preview: you will not be able to merge your beta tenant with your production service.
Office 365 launch	2011	The final Office 365 launch date has not been announced at this time.
Exchange Online Mailbox Pilot Available	After Office 365 launch	Existing customers can enable a small group of users with the features and functions of Office 365.
Transitions Availability Begins	Roughly four months after Office 365 launch	This date represents the period when Microsoft will be able to transition most BPOS customers. Microsoft will contact you 60 to 90 days prior to a proposed transition date. You can accept the date or request a new one.
Transition Availability Ends	Transition Availability + 12 months	You must transition by this date – i.e. 12 months after Transition Availability begins and about 16 months after Office 365 launch).



Transition Communications Overview

Communications	Date	Comments
Microsoft provides ongoing reminders and communications about upcoming transition date	Ongoing	Microsoft will send ongoing reminders and communications via email and in the Microsoft Online Administration Center
Customer begins planning for transition	As soon as possible	Visit the transition center at microsoft.com/online/transition-center.aspx for the latest information. If you have a Microsoft account representative or partner, you should reach out to them to discuss planning for the transition.
Readiness survey & transition date preference	Prior to the Office 365 launch	Microsoft will contact you via email, asking you to answer a survey about when your organization will be ready to transition.
Microsoft proposes a transition date	Close to or after the Office 365 launch, and at least 60 days before proposed transition date	Microsoft will contact you via email and the Microsoft Online Administration Center with a proposed transition date.
Microsoft provides ongoing reminders and communication about upcoming transition date	After you accept the proposed transition	Microsoft will send ongoing reminders and communication via email
Transition occurs	Scheduled transition date	The transition itself will happen in 48 hours or less on a Saturday and Sunday. If you need the transition to occur on different days, you will be able to request this



Scheduling Transitions

Microsoft will work with you to determine a transition date that works for your organization. The scheduling process will work as follows:

- In 2011, Microsoft will contact you via both email and the Microsoft Online Administration Center to propose a transition date. Microsoft may also inquire via email about your transition readiness.
- You will need to accept the proposed transition date, or request a different one.
- Before and after you accept a transition date, Microsoft will continue to communicate with you via email and the Microsoft Online Administration Center to provide guidance and reminders about the transition schedule

The following is a list of transition scheduling considerations:

- Transitions will typically be scheduled to occur over a Saturday and Sunday. Exact start and stop times will be determined by your datacenter: for example, if you are in Europe, the Middle-East or Africa, start and stop times will follow Dublin, Ireland time.
- If you need the transition to occur during the week, on a Friday and Saturday, or some other 48-hour period, it is critical to inform Microsoft of this via the readiness survey Microsoft will send prior to proposing a transition date.
- You should be aware that Microsoft will not be able to schedule transitions over every weekend, nor during every work week. The ideal transition time for you may not be possible for Microsoft.
- Microsoft will optimize the transition schedule to best accommodate all customers and their needs. While Microsoft will attempt to give you the exact date you prefer, Microsoft can't guarantee you will be offered your first choice.

Pricing, Licensing and Offerings

With the exception of SharePoint Online Deskless Worker, a full transition as described in this document will have no impact on a customer's subscription status, billing status, licensing agreement or contract.

The following table summarizes how BPOS Subscriptions will translate to Microsoft Online Services offerings after transition.

Current BPOS Subscription	New Subscription
BPOS Standard Suite	Office 365 (Plan E1)
BPOS Deskless Worker Suite	Office 365 (Plan K1)
Exchange Online	Exchange Online (Plan 1)



Exchange Online Deskless Worker

SharePoint Online

SharePoint Online Deskless Worker

Live Meeting Standard

Office Communications Online

Exchange Online Kiosk

SharePoint Online (Plan 1)

SharePoint Kiosk (K1)

Lync Online (Plan 2)

Lync Online (Plan 1)

Switching to a Different Offering

If you want to take advantage of a new subscription plan after you transition, call customer support to make the change. You cannot upgrade from the E1 or K1 plan until after you transition. You can learn more about the subscription plans available to the [enterprise](#) and [education](#) at office365.microsoft.com/office365-plans.aspx.

How Existing Customers can Try Office 365

There are three ways you can try out the new features and functionality in Office 365:

Method	Date Available	Convertible to Production?	Comments
Beta	Spring 2011	No	This should be viewed as a way to "kick the tires." Data cannot be merged with your production subscription. You cannot use your existing BPOS domain in the beta.
Office 365 Trial	At Office 365 Launch	No	Same as Beta
Transitioning	After Office	Yes	You can enable a small group of users to



Customer Exchange
Online Mailbox Pilot

365 launch

pilot their mailboxes on Office 365. Microsoft will provide more information on how to create the pilot after Office 365 launches.

The data in the pilot mailboxes is production data, and will persist after the full transition.



Understanding System Requirements

Office 365 has a number of important changes to the system requirements for BPOS. The most detailed list of software requirements can be found at <http://onlinehelp.microsoft.com/office365-enterprises/ff652534.aspx>.

New Password Requirements

Office 365 has an updated strong-password policy that differs slightly from the BPOS password policy. When users reset their passwords via the normal password expiration process, new passwords must meet the following requirements:

- Passwords must be between 7 and 16 characters
- Passwords cannot contain characters from different language sets, e.g. Arabic or Greek or German. Only basic, English-language letters and symbols, called ASCII characters, are allowed. ASCII characters include:
- A-Z, a-z, 0-9, ! @ # \$ % ^ & * - _ + = [] { } | \ : ' , . ? / ` ~ " < > () ;

Live Meeting Transition to Lync Online

Microsoft Lync Online, part of Office 365, is the next-generation of instant messaging, web conferencing and audio/video telephone calling.

After transition to Office 365, Lync Online will replace Office Communications Online and Live Meeting. If you subscribed to Live Meeting, you will be able to continue using the Live Meeting service until Live Meeting is phased out at the end of the transition availability period. You can begin the process of transitioning from LiveMeeting to Lync Online for conferencing after the Office 365 launch. The Live Meeting and Lync Online services can run side-by-side, allowing you to have an easy transition from the Live Meeting service to Lync Online for your web conferencing needs.

Customers are advised to:

- Provision audio conferencing
- Deploy the Lync client which will deploy the Lync Outlook Add-in
- Remove the Live Meeting Outlook Add-in
- Instruct end users to reset recurring meetings to Lync Online with a single button click in the meeting to convert a Live Meeting to a Lync Online meeting
- Point end users to [Lync Online web site](#) for short videos on how to use the product

The LiveMeeting service will continue to operate before, during and after your transition. Meetings scheduled with Live Meeting prior to your transition do not need to be changed to Lync Online meetings: users will be able to join meetings previously scheduled on the Live Meeting service through at least 2013, though they will only be able to schedule new meetings with Lync Online. This will allow the end user experience for Live Meeting to move gradually and naturally to Lync Online, rather than a hard cut from one web conferencing service to another.



The Live Meeting client and Office Communicator 2007 client are not supported with Lync Online in Office 365. End users must use Lync to schedule all new meetings.

The Transition Experience for Customers

Overview of the Phases of Transition

The transition experience can be divided into three phases:

Phase	Description	Duration
1. Plan, Prepare and Pilot	Learn about transition and begin planning and preparation activities, including required end-user software changes. Microsoft will contact you to schedule the transition	Variable 3-6 months
2. Transition	Microsoft enables new features and functionality	48 hours Typically a weekend
3. Configuration	Take care of configuration of end-user computers, mobile devices, server applications, etc. as needed	Variable 24-48 hours

Transition Experience for Administrators

Before Transition, the Administrator:

- Receives initial notification about the transition
- Receives proposed transition date
- Confirms or declines proposed transition date
- Updates DNS

During Transition, the Administrator:

- Cannot make changes to the service in the Administration Center. Only the information panel is displayed; all other areas are locked
- Receives links to familiarize with new environment and post-upgrade tasks

After Transition, the Administrator:

- Is signed out of admin portal and must sign back in (using same username/password)
- Is redirected to the new Administration Portal
- Signs in to new Administration Portal (again, using the same credentials)
- Reviews post-transition information
- Creates or assigns a Billing Administrator, and ensures that the Billing Administrator has updated payment information on migrated subscriptions

Transition Experience for End-Users

Before Transition, End Users:

- Review information from their Administrator
- Follow any instructions concerning required client software installation: Office, Lync, Internet Explorer, and the v2 Service Connector

During Transition:

- SharePoint site collections will be locked to 'Read Only'
- Outlook will continue to function, mail flow continues to work
- Users may be prompted to re-start Outlook after transition period ends
- Previous Outlook Web App (OWA) URL will stop working
- Active Sync devices will not be able to connect to Exchange Online with previous configuration

After Transition, End Users:

- Are presented with a new Sign-in page, and sign in with their existing UserID@Company.Com and Password
- Outlook and SharePoint work immediately
- Outlook will automatically re-configure
- SharePoint URLs will direct to new SharePoint Online
- Manually reconfigure OWA URL with URL provided by administrator, replacing any old bookmarks
- Manually reconfigure Active Sync mobile devices, following instructions provided by administrator. Microsoft will provide more detailed information about reconnecting RIM devices before the launch of Office 365.
- Remove the old Microsoft Online Services Sign In application

Key Transition Business Decisions and Actions

The following table summarizes key considerations and decisions that customers should make in preparation for transition:

Consideration	Decision /Action	Comments
User accounts cannot be locked or deleted during the 48-hour transition period	Any employee terminations should be handled prior to the transition weekend.	Only Microsoft customer support will be able to suspend or delete a user account during the transition period.
Office 365 requires Office 2007 SP2 or Office 2010	If you have users running Office 2003, you will need to decide how to deploy updates to end user computers, and/or if you will have some users Office Web Apps instead	Microsoft recommends that you always use the latest versions of Office software, and promptly apply all security and other patches
Office 365 requires Internet Explorer 7 or higher on Windows Vista or Windows 7 for all Microsoft Online portals	Upgrade Internet Explorer 6 if necessary on end-user computers prior to transition	Microsoft recommends that you always use the latest browser software and promptly apply all security and other patches
Office 365 requires Internet Explorer 8 on Windows XP for all Microsoft Online portals	Upgrade Internet Explorer 7 or earlier if necessary on end-user computers prior to transition	Microsoft recommends that you always use the latest browser software and promptly apply all security and other patches
Office 365 requires the new Microsoft Lync client for Lync Online	Upgrade Office Communicator 2007R2 on end-user computers prior to transition	
The Microsoft Online Desktop Upgrade is a highly recommended for configuration and update of end-user computers	Install the Microsoft Online Desktop Upgrade on end-user computers prior to transition	The Microsoft Online Desktop Upgrade will be free and available for download from Microsoft Online at the time Office 365 launches.



Office 365 requires an upgrade to the Microsoft Online Directory Synchronization application

Apply the upgrade to the Microsoft Online Directory Synchronization application

The upgrade to the directory synchronization application will be free and available from Microsoft Online at the time of Office 365 launches.

Office 365 will begin the transition from Live Meeting to Lync Online

After transition remove the Outlook Live Meeting Add-In from Outlook on end-user computers. The Lync Online Outlook Add-In will be automatically installed with the installation of the Lync client. Start using Lync Online to schedule online conferences after transition.

Optional: Decide which identity option to use

Deploy ADFS role on premises

Location-based IP filtering may require all end-user desktops have Windows 7 installed. Microsoft will provide more detailed information prior to Office 365 launch.

Optional: Decide whether rich coexistence will be a requirement

Deploy Exchange Server 2010 CAS role on-premises

Exchange Online in Office 365 will offer rich coexistence that includes free/busy availability sharing between on-premises and online users. Rich coexistence requires an Exchange Server 2010 CAS role deployed on premises.



Customer Support for the Transition

Microsoft Online Services Technical Support

You will continue to have access to the same 24x7 IT-level technical support that you currently receive via online help or the phone. For more information, visit microsoft.com/online/help/en-us/helpowto/homepage.htm. You can also post questions in the transition and Office 365 forums located at social.technet.microsoft.com/Forums/en-us/bpostransition, and community.office365.com/enus/office365/default.aspx, respectively.

Partners

Microsoft partners are a key resource for additional support and information. If you purchased BPOS through a Microsoft partner, you should contact them for additional help. If you would like to work with a partner, the [Microsoft Pinpoint](#) marketplace can help you select one.

Resources

The [Microsoft Online Transition Center](#) is a resource for you to get ongoing guidance and documentation as well as to participate in transition-related discussions on Microsoft-hosted discussion forums.



Appendices



Appendix – Office 365 System Requirements

The most detailed list of software requirements can be found at <http://onlinehelp.microsoft.com/office365-enterprises/ff652534.aspx>.

Appendix – Transition Checklist – Detailed

The following table summarizes the high-level actions that existing customers will need to take to transition:

Phase	Action Category	Action	Condition
All	End-User Communications	End-user communication plan	
1 – Plan	End-User Computer Assessment	Assess end-user computers for pre-requisites for Office 365.	
1 – Plan	Mail-enabled application assessment	Assess and identify mail-enabled applications that will need to be reconfigured	
1 – Plan	Decision Making	Learn about identity options and decide identity scheme: Microsoft Online ID or Federated Identity	
1 – Plan	Decision Making	If Office upgrade is required, determine the best way to procure Office 2007 SP2 or Office 2010 based on licensing scenarios	
2 – Prepare	Client Installation or Configuration Software	Install Microsoft Online Services Connector	
2 – Prepare	Client Productivity Software	Upgrade Office 2003 (not including Outlook) or lower	Only required if using Office 2003 with SharePoint Online
2 – Prepare	Client Productivity Software	Upgrade Outlook 2003 or lower	Only required if using Outlook 2003 with Exchange Online
2 – Prepare	Client Productivity Software	Upgrade Internet Explorer 6 or lower	IE 8 or above for Windows XP IE 7 or above for Windows Vista and Windows 7 Required for accessing Admin portal and End-User Portal

2 – Prepare	Application Testing	Test any client or server software dependent on new client software (such as IE8, Office 2007SP, Office 2010, Lync)	
2 – Prepare	Client Productivity Software	Install Lync	Only required if using Lync Online
2 – Prepare	Exchange Mailbox Pilot		
2 – Prepare	SharePoint Online Snapshot Pilot		
2 – Prepare	Federated Identity	AD cleanup for federated identity	
2 – Prepare	Federated Identity	Install and configure ADFS	
2 – Prepare	Rich Coexistence	Deploy Exchange Server 2010 CAS Server Role	
3 – Configuration	Client Mobile Devices	Re-configure ActiveSync devices connecting to Exchange Online	
3 – Configuration	Federated Identity	Establish Federation Relationship with Microsoft Online Services	
3 – Configuration	Server Application Configuration	Re-configure email-enabled server applications that connect to Exchange Online	
2 – Prepare	Live Meeting to Lync Transition	Remove Live Meeting Add-in	
2 – Prepare	Live Meeting to Lync Transition	End-user training for Lync conferencing	



Appendix – Information for Microsoft Volume License (VL) Customers

Transition Bypass for Existing BPOS Customers with an Enterprise Agreement and an Inactive BPOS Subscription

- If you have purchased BPOS via a Microsoft Volume Licensing Enterprise Agreement but have not activated the subscription, you will be transition to Office 365 shortly after GA unless you tell Microsoft otherwise.
- Microsoft will contact you regarding this option. You must respond promptly to this communication if you wish to opt-out of the immediate transition to Office 365.
- Customers can also notify their Microsoft account representative if they wish to bypass the transition process.

Appendix - Transition Scenarios for Trial and Undeployed Customers

A. In Trial

Trial subscriptions will not be transitioned. A customer who is in a trial state should either:

- 1. Purchase BPOS and Transition.** Continue with the BPOS trial and, when ready, purchase a BPOS subscription and transition to Office 365 as described in this document
- 2. Wait for Office 365 and Re-Trial:**
 - a. Optional**
 - i. Off-board data from trial if desired
 - ii. Remove domain from BPOS trial (if to be used in beta)
 - iii. Request beta subscription and start testing Office 365
 - b. Start Office 365 trial at GA**

Exceptions:

- If you have an Extended Trial, you will be transitioned along with other customers.
- Internal User Rights (IUR) partners technically have a non-expiring trial account. IUR tenants will be transitioned along with other customers.

B. Purchased BPOS But Have Not Started Deploying Production Data to BPOS

A customer may have purchased a BPOS subscription but has not deployed any production data yet. In this scenario, a customer has three options.

1. Deploy data to BPOS and transition to Office 365 as described in this document.
 - a. Continue as is with BPOS, deploy production data to BPOS now and transition to Office 365.
 - b. Note that as explained above, transition from BPOS to Office 365 may not be available immediately after Office 365 General Availability.

2. Do not deploy data to BPOS.
 - a. Start using Office 365 beta for testing. This would be sandbox testing only. In this scenario, the Office 365 beta is not convertible to Office 365 production.
 - b. Transition BPOS subscription only (no users/data) to Office 365.
 - c. Note that as explained above, transition from BPOS to Office 365 may not be available immediately after Office 365 General Availability.
 - d. Deploy data to Office 365 after transition
3. Do not deploy production data on BPOS, decommission existing BPOS subscription at Office 365 GA, and deploy Office 365.
 - a. Start using Office 365 beta for testing. This would be sandbox testing only. In this scenario, the Office 365 beta is not convertible to Office 365 production.
 - b. At Office 365 Launch or after, call Microsoft Online Services customer support to decommission the existing BPOS subscription and subscribe to Office 365.
 - i. Microsoft Volume License customers with an Enterprise Agreement (EA) please see the appendix "[Information for Microsoft Volume License \(VL\) Customers](#)"
 - c. Deploy data to Office 365