

# FastTrack for Microsoft 365 Benefit Description

**Updated:** 3/14/2025

# FastTrack for M365

FastTrack is a **benefit designed to help clients deploy Microsoft 365, Microsoft Teams, Viva, and Security.**

Clients can use FastTrack services with a new or existing qualifying subscription.

For eligibility details, see the [Service Description](#).



Deployment  
Automation  
Tools



Connection to  
Qualified  
Partners



Access to  
FastTrack  
Architects\*



\*Priority Enterprise clients only and/or identified Dynamic clients

**FastTrack is** a proven standard and repeatable process that offers:

- Remote technical enablement guidance
- Email and data migration services
- Access to best practices & Advanced Deployment Guides
- Delivered by endorsed FastTrack Ready Partners.

In addition to FastTrack benefit delivery **FastTrack partners** also offer tailored engagements through value added services such as:

- Project management/co-ordination
- Consulting services
- Architecture and envisioning
- Change management
- Custom adoption approach

FastTrack | Learn → Plan → Configure → Enable

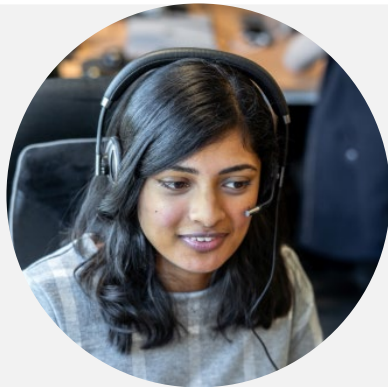
# FastTrack for Microsoft 365

Deploy Microsoft 365 with expert, technical guidance from FastTrack

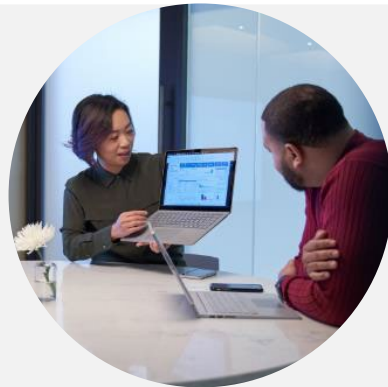
Remote guidance and Data Migration Services from FastTrack can help you:



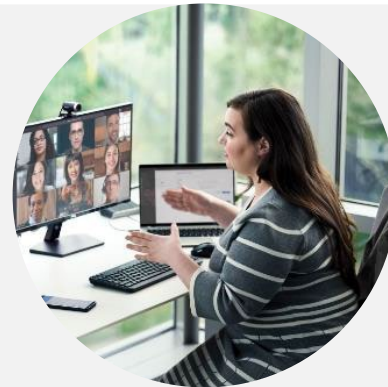
Configure identity, security, compliance, and cloud management



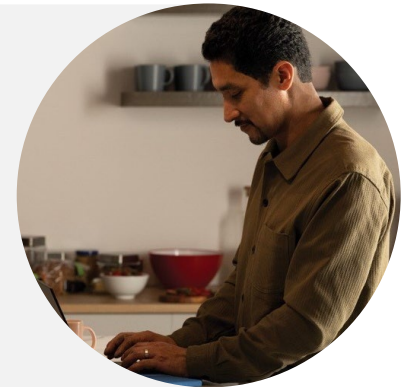
Deploy Windows 11/Windows 365, Microsoft 365 Apps, and Microsoft Edge



[Migrate data](#) and ensure application compatibility



Deploy M365 Copilot, including pre-requisite support, Exchange, SharePoint and Teams



Implement Employee Experience use cases with Microsoft Viva

FastTrack services and guidance available for the life of your eligible subscription.

Visit [aka.ms/fasttrackservicesdescription](https://aka.ms/fasttrackservicesdescription) for the latest FastTrack details.

# FastTrack for Microsoft 365 eligibility

Your customers can get started with a qualifying subscription

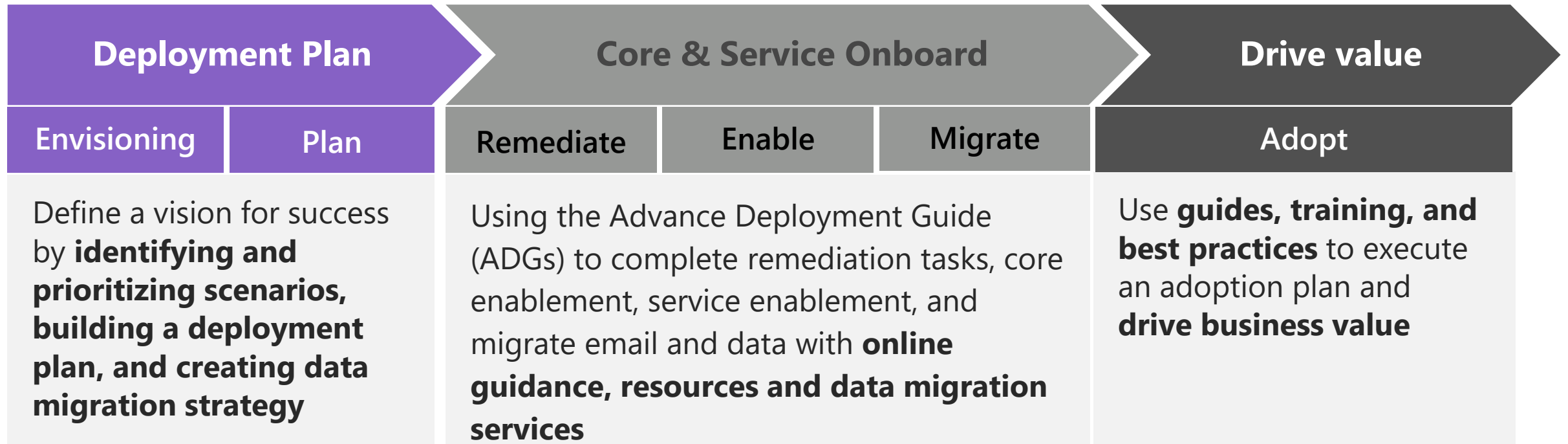
## FastTrack provides

	Microsoft 365 customers	Customers with 150+ licenses	Customers with 500+ licenses
Advanced deployment guides in Microsoft 365 admin center	●	●	●
Remote guidance from FastTrack Specialists*		●	●
Assistance with data and email migration			●

*\*FastTrack Specialists can include approved FastTrack Partners, or Microsoft FastTrack Architects.*

# FastTrack provides expert end-to-end guidance

Realize business value with FastTrack's proven process



# What to expect when you work with FastTrack

## FastTrack responsibility

---

Access to FastTrack Specialists for eligible customers

---

Enablement and deployment guidance

---

Expert guidance for supported services

---

Perform email and data migration (500+ licenses)

---

Best practices, self-serve tools, and resources

## Customer responsibility

---

Project management, on-site readiness/training

---

Remediation and hands-on configuration

---

Custom scopes of work

---

Self-Serve email and data migration (<500 licenses)

---

Execute on change management and process optimization

---

# Get started with FastTrack M365

Microsoft FastTrack helps customers plan for and deploy Microsoft 365

[FastTrack benefit for Microsoft 365](#)

[Eligible plans and services](#)



Microsoft customers can get started with FastTrack by completing three required steps

**Step 1** - Create a Microsoft 365 tenant, also known as an organizational account.

**Step 2** - Add subscriptions to a Microsoft 365 tenant.

**Step 3** - Submit a Request for Assistance form directly in the [Microsoft admin center](#)\* or [Microsoft 365 Setup portal](#)

*\*Requires M365 tenant admin permissions*





# Key Resources



## **FastTrack M365 Website**

[fasttrack.microsoft.com](https://fasttrack.microsoft.com)

## **FastTrack M365 Service and Benefit Description**

[aka.ms/FastTrackServiceDescription](https://aka.ms/FastTrackServiceDescription)

## **FastTrack M365 – Request for Assistance (RFA)**

- [Microsoft admin center RFA Form](#) *(for M365 tenant admins)*
- [setup.cloud.microsoft/microsoft-365-fasttrack-assistance](https://setup.cloud.microsoft/microsoft-365-fasttrack-assistance)



# FastTrack for M365 - Field and Customer Resources

## Top field resources

Find your FTA:  
[aka.ms/findyourfta](https://aka.ms/findyourfta)

FastTrack ECIF guidance:  
[aka.ms/fastrackECIF](https://aka.ms/fastrackECIF)

FastTrack RFA FAQ:  
[FastTrack Assistance FAQs – Field](#)

Request for Assistance Form:  
[Microsoft 365 Setup portal](#)  
*(Requires M365 tenant admin approval)*

Standard Partner Referrals:  
[aka.ms/standardreferrals](https://aka.ms/standardreferrals)

Help with FastTrack Ready Partner:  
[internalfrphelp@microsoft.com](mailto:internalfrphelp@microsoft.com)

List of FastTrack Partners:  
[FastTrack Partner Community Endorsements](#)

## Top customer resources

FastTrack Portal and Website:  
[fasttrack.microsoft.com](https://fasttrack.microsoft.com)

FastTrack Service Description:  
[aka.ms/fasttrackservicedescription](https://aka.ms/fasttrackservicedescription)

FastTrack Request for Assistance:  
[Microsoft admin center](#)  
*(Requires M365 tenant admin permissions)*

# How to Get Deployment Assistance from FastTrack

## Self-Serve Guidance

FastTrack self serve guidance is available to all M365 customers as an included benefit.

Visit Microsoft Learn [M365 Advanced Deployment Guides](#)

## Customer Requests FastTrack Assistance via M365 Admin Center

Microsoft tenant admins can request FastTrack deployment assistance (RFA) directly within the [Microsoft Admin Center](#)

## Field Request FT Assistance at Setup.Microsoft.com

MS Field and non-admin customers can request FastTrack deployment assistance (RFA) at the [Microsoft 365 Setup portal](#)

\*Tenant Admins must approve requests. Unapproved requests expire after 30 days.

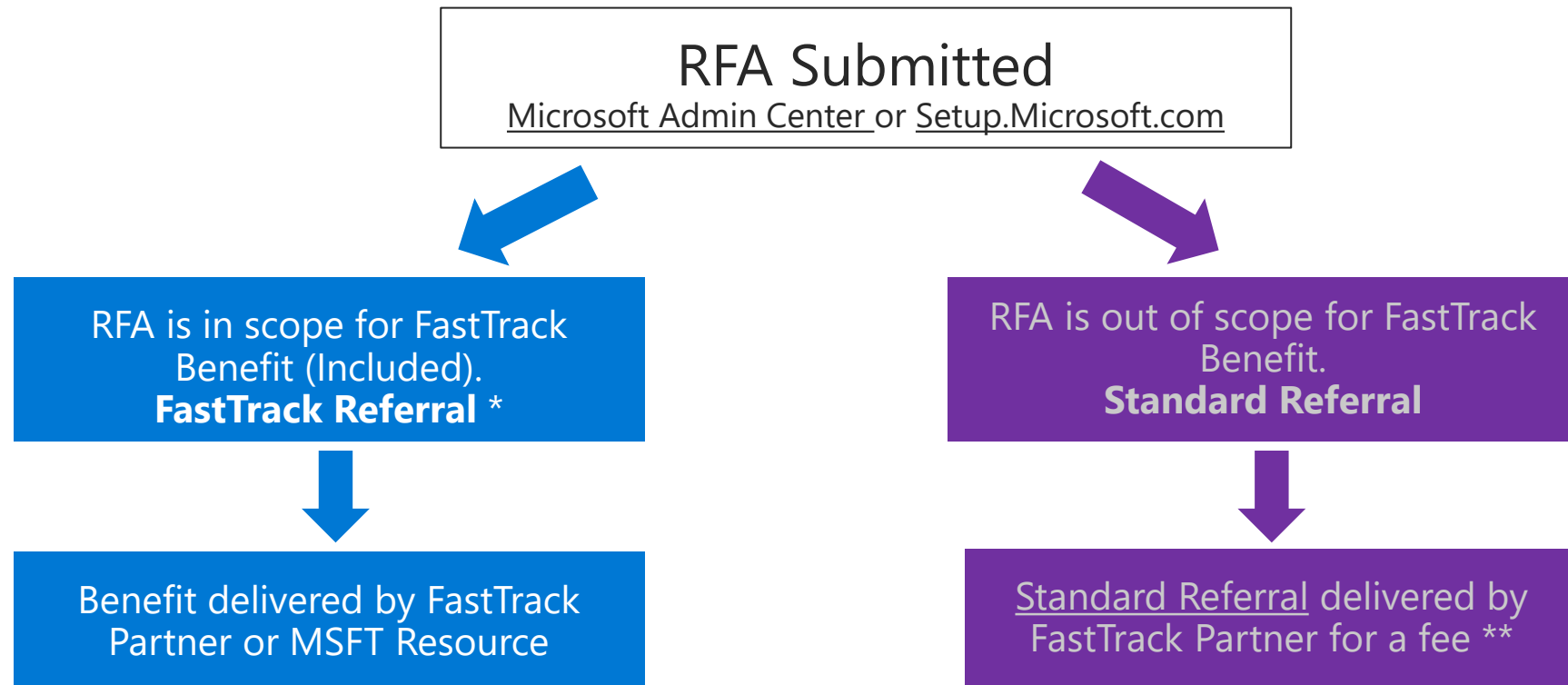
## FastTrack Architect Supported Accounts

Select Enterprise accounts within Microsoft are supported with a FastTrack Architect.

To find out if your account has an FTA assigned, go to <https://aka.ms/findyourfta>

# What happens to Request For Assistance (RFA)

One form, two ways to quickly get customers engaged for deployment assistance: [Microsoft 365 deployment assistance | Deploy with Microsoft FastTrack](#)

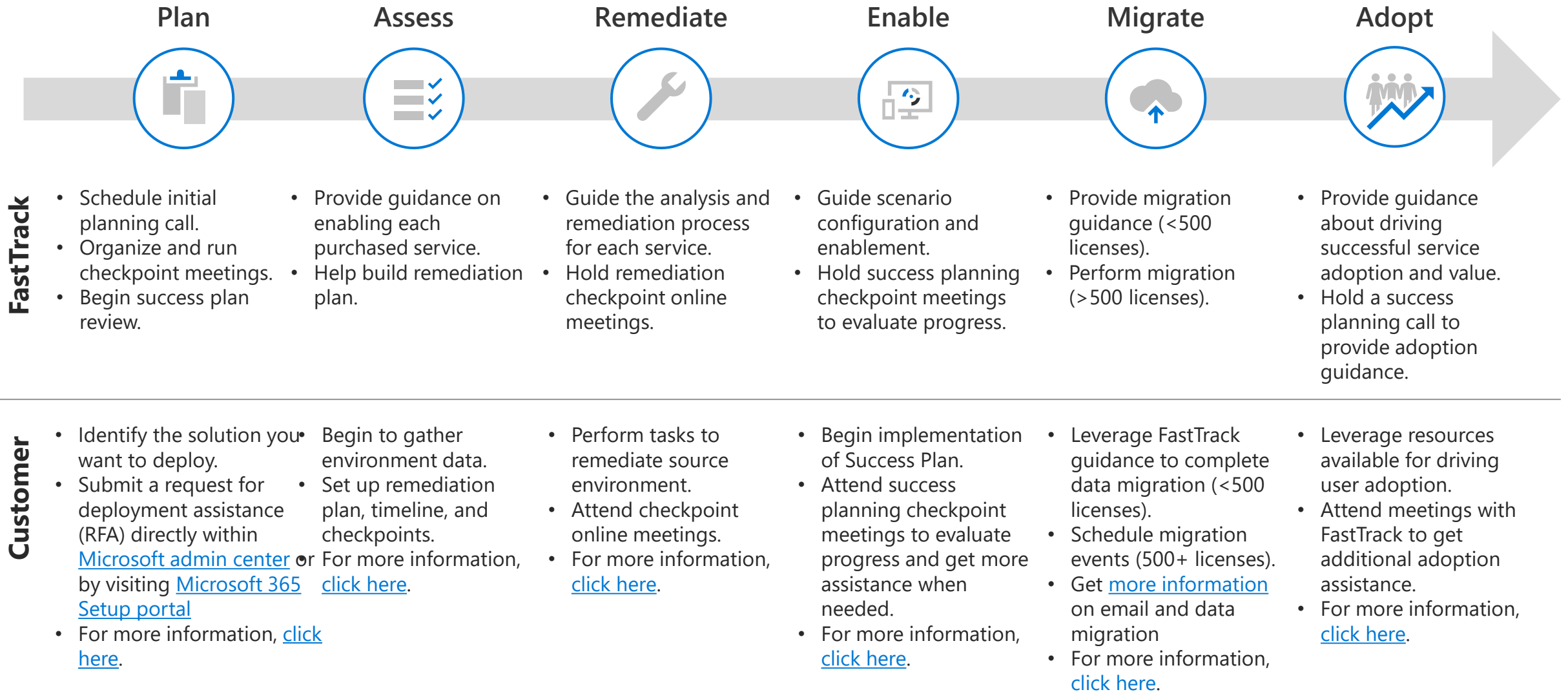


*\*Refer to the [Service Description](#) and [Eligibility](#) to learn what is included in the Benefit. Anything outside of the Benefit may incur additional costs.*

*\*\*Standard Referrals are delivered by FastTrack Community Partners on a for-fee basis to the customer. Customer/RFA submitter has the option to decline.*

Getting started

# FastTrack process for Microsoft 365



# FastTrack product and capability index

Select a product to view detailed information

<a href="#">App Assure</a>	<a href="#">Microsoft 365 Defender</a>	<a href="#">Microsoft Entra Internet Access</a>	<a href="#">Microsoft Purview Information Protection</a>
<a href="#">Microsoft 365 Copilot</a>	<a href="#">Microsoft Defender for Cloud Apps</a>	<a href="#">Microsoft Entra Private Access</a>	<a href="#">Microsoft Purview Insider Risk</a>
<a href="#">Employee Experience (Microsoft Viva)</a>	<a href="#">Microsoft Defender for Endpoint</a>	<a href="#">Microsoft Entra ID Governance</a>	<a href="#">Microsoft Teams</a>
<a href="#">Viva Amplify</a>	<a href="#">Microsoft Defender for Identity</a>	<a href="#">Microsoft Entra Suite</a>	<a href="#">OneDrive for Business</a>
<a href="#">Viva Connections</a>	<a href="#">Microsoft Defender for Office 365</a>	<a href="#">Microsoft Intune &amp; Intune Suite</a>	<a href="#">Project Online</a>
<a href="#">Viva Engage</a>	<a href="#">Microsoft Sentinel</a>	<a href="#">Microsoft Purview Audit (Premium)</a>	<a href="#">SharePoint Online</a>
<a href="#">Viva Goals</a>	<a href="#">Microsoft Edge</a>	<a href="#">Microsoft Purview Compliance Manager</a>	<a href="#">Universal Print</a>
<a href="#">Viva Glint</a>	<a href="#">Microsoft Entra ID</a>	<a href="#">Microsoft Purview Data Lifecycle Management</a>	<a href="#">Windows 365</a>
<a href="#">Viva Insights</a>	<a href="#">Microsoft Entra ID Premium</a>	<a href="#">Microsoft Purview eDiscovery (Premium)</a>	<a href="#">Windows Autopatch</a>
<a href="#">Viva Learning</a>			<a href="#">Windows Autopilot</a>
<a href="#">Exchange Online</a>			<a href="#">Windows client deployment</a>
<a href="#">Microsoft 365 Apps</a>			

Select a phase from the engagement process or additional benefits to view detailed information

<a href="#">Plan</a>	<a href="#">Assess</a>	<a href="#">Remediate</a>	<a href="#">Enable</a>	<a href="#">Migrate email</a>	<a href="#">Migrate data</a>	<a href="#">Adopt</a>
----------------------	------------------------	---------------------------	------------------------	-------------------------------	------------------------------	-----------------------

# Microsoft 365 Copilot



## WHAT TO EXPECT

Microsoft FastTrack offers remote guidance and best practices for Microsoft 365 Copilot readiness and adoption, including license assignment, usage, and business value.

**Microsoft FastTrack provides guidance to help customers:**

- 1 Overview of product and architecture
- 2 Deploying the following products and features as needed:
  - Exchange Online
  - SharePoint and OneDrive
  - Microsoft Teams
  - Microsoft 365 Apps
  - Microsoft Purview
  - Copilot Chat
  - Microsoft Intune
  - Microsoft Loop and Outlook
  - Copilot Dashboard and Copilot Learning Academy
- 3 Guidance on data governance via reporting, SharePoint Advanced Management, and Purview
- 4 Moving M365 apps to a supported Update Channel
- 5 Adoption and Business Value
  - License assignment
  - Leverage the Copilot Success Kit to highlight the foundational components of successful adoption
  - Review top usage scenarios
  - Provide guidance on available resources for training and skilling
  - Review Copilot Dashboard to understand usage and value
  - Use Viva apps to accelerate enablement

**Throughout the engagement, customers are responsible for:** configuring recommended settings and executing needed remediations; providing project management of your resources; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.

## NOTES

FastTrack assistance does not include:

- Standard FastTrack out of scope
- Project management and execution
- Creation or execution of adoption and change management strategy
- End-user training
- Data Governance assessment
- Custom scenarios or content



# FastTrack products and capabilities

# App Assure



## WHAT TO EXPECT

Microsoft is committed to helping ensure your apps work on the latest versions of our software. If you encounter any issues, we will help you remediate them at no additional cost. The FastTrack [eligibility criteria](#) does not apply to App Assure services, subject to the discretion of Microsoft. When you purchase any of the Windows 10, Windows 11, or Microsoft 365 services (as detailed in [Eligible Services and Plans](#)), FastTrack Specialists provide advisory and remediation guidance if you encounter app compatibility issues as you deploy: Windows 10 and 11 (including Arm64), Microsoft 365 Apps, Windows 365, Microsoft Edge, and Azure Virtual Desktop.

See below for source environment expectations:

- 1 Apps that worked on Windows 7/8.1/10 also work on Windows 10 and Windows 11. Apps that worked on Office 2010/2013/2016/2019 also work on Microsoft 365 Apps.
- 2 Apps that worked on Windows 7/8.1/10 will work on Windows 365 Cloud PC.
- 3 Apps that worked on Windows 10 also work on Windows 10 and Windows 11 on Arm64 devices including Copilot+ PCs powered by Qualcomm's Snapdragon X Series\*.  
\*Note: x64 (64-bit) emulation is available on Windows 11 on Arm devices.
- 4 If your web apps or sites work on Internet Explorer 11, supported versions of Google Chrome, or any version of Microsoft Edge, they'll also work with Microsoft Edge.
- 5 Apps running on Windows 7/8.1/10 or Windows Server (as virtualized apps) also run on Windows 10 and Windows 11 Enterprise, and Windows 10 and Windows 11 Enterprise multi-session.\*

\* Windows Enterprise multi-session compatibility exclusions and limitations include:

- Limited redirection of hardware.
- A/V-intensive apps may perform in a diminished capacity.
- 16-bit apps aren't supported for Azure Virtual Desktop.

**Throughout the engagement, customers are responsible for:** Configuring recommended settings and executing needed remediations; providing project management of your resources; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.

**Customers are also responsible for:** Creating an app inventory and validating apps on Windows 10, Windows 11, and Microsoft 365 Apps.

## NOTES

FastTrack doesn't assist with:

- App inventory and testing to determine what does and doesn't work on Windows and Microsoft 365 Apps. For more guidance on this process, see the [Windows and Office 365 deployment lab kit](#). If you're interested in guidance for modernizing endpoints or deploying Windows 11, [Microsoft 365 Setup portal](#)
- Researching third-party ISV apps for Windows compatibility and support statements.
- App packaging-only services. However, the App Assure team packages apps that we have remediated for Windows to ensure they can be deployed in the customer's environment.

Assistance is provided in English, Spanish, Portuguese, Chinese, Japanese, and Korean.

# Employee Experience with Microsoft Viva



## WHAT TO EXPECT

Microsoft FastTrack provides deployment guidance for Microsoft Viva, Microsoft's Employee Experience platform. The guidance is focused on enabling use cases to achieve your business outcomes and covers the below apps:

- |  |   |
|--|---|
| <ul style="list-style-type: none"><li>• <b>Viva Amplify</b></li><li>• <b>Viva Connections</b></li><li>• <b>Viva Engage</b></li></ul> | <ul style="list-style-type: none"><li>• <b>Viva Glint</b></li><li>• <b>Viva Goals</b></li><li>• <b>Viva Insights</b></li><li>• <b>Viva Learning</b></li></ul> |
|--|---|

Microsoft FastTrack provides guidance to help customers:

- 1 Confirm apps and features within Microsoft Viva** you would like to use to support your Employee Experience needs.
- 2 Review technical requirements.** Provide guidance on actions you need to take to enable the best Viva experience.
- 3** Walk through **configuration steps for each Microsoft Viva app** to enable selected features for the respective employee experience area:
  - Employee communications and communities featuring **Viva Connections, Viva Engage and Viva Amplify.**
  - Workplace Analytics and Feedback featuring **Viva Insights and Viva Glint.**
  - Learning and knowledge management featuring **Viva Learning.**
  - Goal setting and management featuring **Viva Goals.**
  - Including guidance on how Viva can accelerate your M365 Copilot deployments.

Throughout the engagement, customers are responsible for: configuring recommended settings and executing needed remediations; providing project management of your resources; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.

# Viva Amplify



## WHAT TO EXPECT

Microsoft FastTrack provides deployment guidance for Microsoft Viva Amplify as part of the Employee Experience platform. Viva Amplify centralizes campaign management, publishing, and reporting so corporate communicators can reach and engage all employees meaningfully.

- 1 Confirm apps and features within Microsoft Viva** you would like to use to support your Employee Experience needs.
- 2 Review technical requirements.** Provide guidance on actions you need to take to enable the best Viva experience.
- 3** Walk through **configuration steps for Microsoft Viva Amplify**, including guidance to help you with:
  - Assigning licenses and roles.
  - Configuring Viva Amplify admin settings.
  - Managing who can create campaigns.
  - Managing organizational data.
  - Setup M365 Copilot campaign.

Throughout the engagement, customers are responsible for: configuring recommended settings and executing needed remediations; providing project management of your resources; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.

## NOTES

Customers with 150 or more seats of an eligible product will be able to use FastTrack for deployment guidance on Microsoft Viva Amplify, Connections, Engage, Glint, Goals, Insights and Learning.

Go to the Service Description for additional guidance on eligibility and source environment details.

# Viva Connections



## WHAT TO EXPECT

Microsoft FastTrack provides deployment guidance for Microsoft Viva Connections as part of the Employee Experience platform. Viva Connections is your company-branded destination where **employees can explore news, join conversations**, and connect with others across the organization in the apps and devices they use daily.

Microsoft FastTrack provides guidance to help customers:

- 1 Confirm apps and features within Microsoft Viva** you would like to use to support your Employee Experience needs.
- 2 Review technical requirements.** Provide guidance on actions you need to take to enable the best Viva experience.
- 3 Walk through configuration steps for Microsoft Viva Connections**, including guidance to help you with:
  - Assigning licenses and roles.
  - Creating Viva Connections experiences (with or without a home site).
  - Setting up the default experience.
  - Enabling Viva Connections dashboard, feed, and resources (including web parts).
  - Enabling global navigation in SharePoint.
  - Creating out-of-box adaptive cards for the dashboard.
  - Setting up a SharePoint news framework (including the news web part).
  - Setting audience targeting and Viva Connections access permissions.
  - Enabling, installing, and pinning the Viva Connections Teams app.

Throughout the engagement, customers are responsible for: configuring recommended settings and executing needed remediations; providing project management of your resources; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.

## NOTES

Customers with 150 or more seats of an eligible product will be able to use FastTrack for deployment guidance on Microsoft Viva Amplify, Connections, Engage, Glint, Goals, Insights and Learning.

Go to the Service Description for additional guidance on eligibility and source environment details.

# Viva Engage



## WHAT TO EXPECT

Microsoft FastTrack provides deployment guidance for Microsoft Viva Engage as part of the Employee Experience platform. The guidance is focused on enabling use cases to achieve your business outcomes. Communication featuring Viva Engage **helps build community, spark engagement with leadership, and build personal networks**.

Microsoft FastTrack provides guidance to help customers:

- 1 Confirm apps and features within Microsoft Viva** you would like to use to support your Employee Experience needs.
- 2 Review technical requirements.** Provide guidance on actions you need to take to enable the best Viva experience.
- 3 Walk through configuration steps for Microsoft Viva Engage**, including guidance to help you with:
  - Assigning licenses and roles.
  - Enabling native mode.
  - Configuring Viva Engage admin settings.
  - Creating and managing Viva Engage communities.
  - Enabling external collaboration.
  - Enabling live events, storylines, and stories.
  - Enabling leadership corner, campaigns, ask me anything (AMAs) and Viva Answers.
  - Enabling, installing, and pinning the Viva Engage Teams app.
  - Setting up M365 Copilot adoption community in Viva Engage.

Throughout the engagement, customers are responsible for: configuring recommended settings and executing needed remediations; providing project management of your resources; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.

## NOTES

Customers with 150 or more seats of an eligible product will be able to use FastTrack for deployment guidance on Microsoft Viva Amplify, Connections, Engage, Glint, Goals, Insights and Learning.

Go to the Service Description for additional guidance on eligibility and source environment details.

# Viva Goals



## WHAT TO EXPECT

Microsoft FastTrack provides deployment guidance for Microsoft Viva Goals as part of the Employee Experience platform. Viva Goals immerses everyone in the **company's purpose and top priorities** with a goal alignment solution that creates a culture of engaged employees achieving results.

Microsoft FastTrack provides guidance to help customers:

- 1 Confirm apps and features within Microsoft Viva** you would like to use to support your Employee Experience needs.
- 2 Review technical requirements.** Provide guidance on actions you need to take to enable the best Viva experience.
- 3 Walk through configuration steps for Microsoft Viva Goals**, including guidance to help you with:
  - Assigning licenses and roles.
  - Configuring organization creation rules.
  - Configuring admin settings.
  - Enabling Viva Goals integrations.
  - Enabling, installing, and pinning the Viva Goals Teams app.

Throughout the engagement, customers are responsible for: configuring recommended settings and executing needed remediations; providing project management of your resources; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.

## NOTES

Customers with 150 or more seats of an eligible product will be able to use FastTrack for deployment guidance on Microsoft Viva Amplify, Connections, Engage, Glint, Goals, Insights and Learning.

Go to the Service Description for additional guidance on eligibility and source environment details.



## WHAT TO EXPECT

Microsoft FastTrack provides deployment guidance for Microsoft Viva Glint as part of the Employee Experience platform. Viva Glint helps organizations capture valuable employee feedback and translate insights to actions, helping managers and teams to measure and improve their employee experience.

- 1 Confirm apps and features within Microsoft Viva** you would like to use to support your Employee Experience needs.
- 2 Review technical requirements.** Provide guidance on actions you need to take to enable the best Viva experience.
- 3** Walk through **configuration steps for Microsoft Viva Glint**, including guidance to help you with:
  - Reviewing required network connectivity.
  - Setting up allowlists.
  - Provisioning your Viva Glint tenant.
  - Assigning company admin roles.
  - Secure File Transfer Protocol (SFTP) configuration.
  - Setting up user attribute structures.
  - Uploading employee data and attributes.
  - Reviewing Viva Glint General Settings.
  - Setting up app features and settings.
  - Reviewing survey access methods.
  - Setting up survey distribution lists.
  - Setting up M365 Copilot survey templates.

Throughout the engagement, customers are responsible for: configuring recommended settings and executing needed remediations; providing project management of your resources; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.

## NOTES

Customers with 150 or more seats of an eligible product will be able to use FastTrack for deployment guidance on Microsoft Viva Amplify, Connections, Engage, Glint, Goals, Insights and Learning.

Go to the Service Description for additional guidance on eligibility and source environment details.

# Viva Insights



## WHAT TO EXPECT

Microsoft FastTrack provides deployment guidance for Microsoft Viva Insights as part of the Employee Experience platform. Viva Insights\* helps individuals, managers, and business leaders **gain personalized insights and actionable recommendations**.

Microsoft FastTrack provides guidance to help customers:

- 1 Confirm apps and features within Microsoft Viva** you would like to use to support your Employee Experience needs.
- 2 Review technical requirements.** Provide guidance on actions you need to take to enable the best Viva experience.
- 3 Walk through configuration steps for Microsoft Viva Insights**, including guidance to help you with:
  - Assigning licenses and roles.
  - Configuring personal insights features.
  - Configuring the Viva Insights admin portal.
  - Providing an overview and demonstration of the Viva Insights platform.
  - Uploading the organizational data file.
  - Enabling the Microsoft Power BI templates in the Viva Insights portal.
  - Configuring the M365 Copilot Dashboard including Advanced Analyst Workbench
  - Creating of queries in Viva Insights portal.
  - Enabling, installing, and pinning the Viva Insights Teams app.

Throughout the engagement, customers are responsible for: configuring recommended settings and executing needed remediations; providing project management of your resources; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.

*\*Includes Workplace Analytics as it is being rebranded to Viva Insights.*

## NOTES

Customers with 150 or more seats of an eligible product will be able to use FastTrack for deployment guidance on Microsoft Viva Amplify, Connections, Engage, Glint, Goals, Insights and Learning.

Go to the Service Description for additional guidance on eligibility and source environment details.

# Viva Learning



## WHAT TO EXPECT

Microsoft FastTrack provides deployment guidance for Microsoft Viva Learning as part of the Employee Experience platform. Viva Learning **enables employees to discover, share, and track learning** from various content sources, and enable business leaders to drive a culture of learning through empowered time management and coaching.

Microsoft FastTrack provides guidance to help customers:

- 1 Confirm apps and features within Microsoft Viva** you would like to use to support your Employee Experience needs.
- 2 Review technical requirements.** Provide guidance on actions you need to take to enable the best Viva experience.
- 3 Walk through configuration steps for Microsoft Viva Learning**, including guidance to help you:
  - Assigning licenses and roles.
  - Configuring Viva Learning admin settings.
  - Enabling SharePoint integration.
  - Enabling supported third-party learning management systems (LMSs) or content providers.
  - Enabling learning paths and learning academies.
  - Enabling, installing, and pinning the Viva Learning Teams app.
  - Configuring Microsoft Copilot Academy.

Throughout the engagement, customers are responsible for: configuring recommended settings and executing needed remediations; providing project management of your resources; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.

## NOTES

Customers with 150 or more seats of an eligible product will be able to use FastTrack for deployment guidance on Microsoft Viva Amplify, Connections, Engage, Glint, Goals, Insights and Learning.

Go to the Service Description for additional guidance on eligibility and source environment details.

# Exchange Online



## WHAT TO EXPECT

Microsoft FastTrack guides you through the process to get your organization ready to use email. The exact steps depend on your source environment and your email migration plans.

Microsoft FastTrack provides guidance to help customers:

- 1 Configure firewall ports and set up DNS, including the required Autodiscover, sender policy framework (SPF), and MX records, as needed.
- 2 Set up user provisioning (including licensing).
- 3 Configure email flow between the source environment and Exchange Online/Office 365.
- 4 Configure Exchange Online Protection (EOP), data loss protection (DLP), Office 365 Message Encryption (OME), and Microsoft Defender for Office 365 (if available in your subscription) and verify your MX records point to Office 365 for all validated mail-enabled domains.
- 5 Configure hybrid setup either between a single on-premises Exchange organization and Office 365 *or* between multiple on-premises Exchange organizations and Office 365. Discuss with your FastTrack Specialist on email migration strategy and assistance through FastTrack Migration Team.
- 6 Configure mailbox clients (New Outlook, Outlook for Windows, Outlook on the web, and Outlook for iOS and Android).

*Integrating on-premises IP-PBX systems with Exchange Online Unified Messaging is not supported in GCC High and DoD subscriptions.*

**Throughout the engagement, customers are responsible for:** configuring recommended settings and executing needed remediations; providing project management of your resources; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.

## SOURCE ENVIRONMENT

Your environment must have one of the following minimum levels:

Single or multiple Exchange organizations with Exchange Server 2010 onward

G Suite environments (Gmail, Contacts, and Calendar only)

Additional detail on email migration >

# Microsoft 365 Apps



## WHAT TO EXPECT

Microsoft FastTrack provides guidance to help customers:

- 1 Address deployment issues.
- 2 Apply user-based or device-based licensing. This includes assigning user licenses using the [Microsoft 365 admin center](#) and Windows PowerShell and provision Microsoft 365 Apps.
- 3 Install Microsoft 365 Apps from the Office 365 portal using Click-to-Run.
- 4 Install Office Mobile apps (like Outlook for iOS and Android, Word Mobile, Excel Mobile, and PowerPoint Mobile) on your iOS, Android, or Windows Mobile devices.
- 5 Configure update settings using the Office 365 Deployment Tool.
- 6 Select and set up a local or cloud installation; set up single on-site distribution server.
- 7 Create the Office Deployment Tool configuration XML with the Office Customization Tool or native XML to configure the deployment package.
- 8 Deploy with Microsoft Endpoint Configuration Manager, including assistance with the creation of Microsoft Endpoint Configuration Manager packaging.
- 9 Provide guidance about the client servicing model

**Throughout the engagement, customers are responsible for:** configuring recommended settings and executing needed remediations; providing project management of your resources; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.

## NOTES

Microsoft 365 Apps for desktop include:

- Outlook
- Word
- Excel
- PowerPoint
- Teams
- OneNote
- Access (PC only)

Office Mobile apps include:

- Outlook Mobile
- Word Mobile
- Excel Mobile
- PowerPoint Mobile
- OneNote Mobile

# Microsoft Defender for Cloud Apps\*



## WHAT TO EXPECT

Microsoft Defender for Cloud Apps is a Cloud Access Security Broker (CASB) that provides rich visibility, control over data travel, and sophisticated analytics to identify and combat cyberthreats across most of your Microsoft and third-party cloud services.

### Microsoft FastTrack provides guidance to help customers:

- 1 Configure the portal, including import user groups; manage admin access and settings; scope deployment for certain user groups to be monitored or excluded for monitoring; set IP ranges and tags; personalize the user experience with your logo and customize messaging.
- 2 Set up cloud discovery to provide you with ongoing visibility of Shadow IT usage via Microsoft Defender for Endpoints, Zscaler, and/or iBoss. Configure Cloud Discovery dashboards; customize app risk scores based on the organization's priorities; create app tags and categories; sanction and un-sanction apps.
- 3 Set up App Governance. Guide customer through overview page and create up to five App Governance policies.
- 4 Connect [featured apps](#) via the app connectors including AWS, Azure, Box, Dropbox, GitHub Enterprise Cloud, GCP, G Suite, Office 365, Okta, Salesforce, ServiceNow, Webex, and Workday. Demonstrate how to use the activity and file logs; and manage OAuth apps.
- 5 Set up Conditional Access App control in the Conditional Access and Microsoft Defender for Cloud Apps portals to apply real time session controls.
- 6 Configure all the [Top 20 CASB use cases](#) except:
  - Audit the configuration of your IaaS environments (#18).
  - Monitor user activities to protect against threats in your IaaS environments (#19).
  - Create or update up to 6 policies.

**Throughout the engagement, customers are responsible for:** configuring recommended settings and executing needed remediations; providing project management of your resources; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.

## NOTES

Microsoft Defender for Cloud Apps is a user-based subscription service. Each license is a per user, per month license.

Microsoft Defender for Cloud Apps can be licensed as a standalone product or as part of several different [licensing plans](#).

For more information:

- Visit [What is Microsoft Defender for Cloud Apps?](#)
- Request deployment assistance here [Microsoft 365 Setup portal](#).

When you select Microsoft Defender for Cloud Apps on the Request for Assistance form on the FastTrack site, you will also receive guidance to leverage Microsoft Defender XDR.

\*Microsoft Defender for Cloud Apps was formerly known as Microsoft Cloud App Security

# Microsoft Defender XDR



## WHAT TO EXPECT

Microsoft Defender XDR is a unified pre- and post-breach enterprise defense suite that natively coordinates detection, prevention, investigation, and response across endpoints, identities, email, and applications to provide integrated protection against sophisticated attacks.

With the integrated Microsoft Defender XDR solution, security professionals can stitch together the threat signals that each of these products receive and determine the full scope and impact of the threat; how it entered the environment, what it's affected, and how it's currently impacting the organization. Microsoft Defender XDR takes automatic action to prevent or stop the attack and self-heal affected mailboxes, endpoints, and user identities.

### Microsoft FastTrack provides guidance to help customers:

- 1 Get an overview of the Microsoft Defender XDR portal.
- 2 Review cross-product Incidents, focusing on what is critical by ensuring the full attack scope, impacted assets, and automated remediation actions are grouped together.
- 3 See how Microsoft Defender XDR can orchestrate the investigation of the assets, users, devices, and mailboxes that might have been compromised through automated self-healing.
- 4 Explain and provide an example of how customers can proactively hunt for intrusion attempts and breach activity affecting email, data, devices, and accounts across multiple data sets.
- 5 See how they can review and improve their security posture holistically through Secure Score.
- 6 Enable unified security operations platform within Defender XDR portal.

**Throughout the engagement, customers are responsible for:** configuring recommended settings and executing needed remediations; providing project management of your resources; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.

## NOTES

Any of these licenses gives you access to Microsoft Defender XDR features in Microsoft 365 security center without additional cost:

- Microsoft 365 E5 or A5
- Microsoft 365 E5 Security or A5 Security
- Windows 10/11 Enterprise E5 or A5
- Enterprise Mobility + Security (EMS) E5 or A5
- Office 365 E5 or A5
- Microsoft Defender for Endpoint
- Microsoft Defender for Identity
- Microsoft Defender for Cloud Apps
- Defender for Office 365 (Plan 2)

For more information:

- Visit [What is Microsoft Defender XDR?](#)
- Visit the FastTrack site to make a [Microsoft 365 Setup portal](#).



# Microsoft Defender for Endpoint



## WHAT TO EXPECT

Microsoft FastTrack provides guidance to help customers:

- 1 Configure recommended eligible services settings.
- 2 Provision your infrastructure.
- 3 Onboard Microsoft Defender for Endpoint for eligible customers.
- 4 Configure:
  - [Endpoint Detection and Response \(EDR\)](#) – Microsoft Defender for Endpoint detection and response capabilities provide advanced attack detections that are near real-time and actionable.
  - [Next Generation Protection \(NGP\)](#) – Windows Defender Antivirus is a built-in antimalware solution that provides next generation protection for desktops, portable computers, and servers.
  - [Attack Surface Reduction \(ASR\)](#) – FastTrack provides benefits around network protection, controlled folder access, and the configuration of rules under Attack Surface Reduction.
- 5 Set up the following scenarios:
  - [Threat Vulnerability Management \(TVM\)](#) – Discover vulnerabilities and misconfigurations in real-time based on sensors, without the need for agents or periodic scans.
  - [Automated Investigation and Remediation \(Auto IR\)](#) – Microsoft Defender for Endpoint uses Automated investigations to significantly reduce the volume of alerts that need to be investigated individually.

**Throughout the engagement, customers are responsible for:** configuring recommended settings and executing needed remediations; providing project management of your resources; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.

## NOTES

Customers with 150+ licenses of Microsoft Defender for Endpoint, can use FastTrack to deploy Microsoft Defender for Endpoint.

For Attack Surface Reduction (ASR): Hardware-based isolation, application control, exploit protection, and network firewall are not in the scope of the FastTrack benefit.

Additionally, troubleshooting break/fix scenarios, as well as ongoing management and threat response are outside of the FastTrack scope.

For more information:

- Visit [What is Microsoft Defender for Endpoint?](#)
- Visit the FastTrack site to make a [Microsoft 365 Setup portal](#).

When you select Defender for Endpoint on the Request for Assistance form on the FastTrack site, you will also receive guidance to leverage Microsoft Defender XDR.

# Microsoft Defender for Identity



## WHAT TO EXPECT

Microsoft Defender for Identity is a cloud-based security solution that leverages your on-premises Active Directory signals to identify, detect, and investigate advanced threats, compromised identities, and malicious insider actions directed at your organization.

### Microsoft FastTrack provides guidance to help customers:

- 1 Create your instance of Microsoft Defender for Identity and connect it to Active Directory.
- 2 Assess the readiness of your environment to deploy the Microsoft Defender for Identity Sensor on your domain controllers, including running the sizing tool for resource capacity planning.
- 3 Deploy the Microsoft Defender for Identity Sensor to capture and parse network traffic and Windows events directly from your domain controllers, including download the sensor package; configure the sensor; install the sensor on your domain controller; silent installation of the sensor on your domain controller; and deploy the sensor to your multi-forest environment.
- 4 Enable role groups or granular RBAC.
- 5
  - Tune the environment to reduce the “noise”.
  - Review the identity security posture report in Microsoft Secure Score.
  - Be aware of remediation options on a compromised account.
- 6 Migrate from Advanced Threat Analytics to Microsoft Defender for Identity (if applicable).

**Throughout the engagement, customers are responsible for:** configuring recommended settings and executing needed remediations; providing project management of your resources; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.

## NOTES

Customers with 150 or more seats of Microsoft 365 E5, Microsoft 365 E5 Security, Enterprise Mobility + Security E5, or a standalone license will be able to use FastTrack to deploy Microsoft Defender for Identity to learn best practices.

For more information:

- Visit [What is Microsoft Defender for Identity?](#)
- Visit the FastTrack site to make a [Microsoft 365 Setup portal](#).

When you select Defender for Identity on the Request for Assistance form on the FastTrack site, you will also receive guidance to leverage Microsoft Defender XDR.

# Microsoft Defender for Office 365



## WHAT TO EXPECT

Microsoft FastTrack provides guidance to help customers:

- 1 Configure recommended eligible services settings.
- 2 Provision and configure your infrastructure:
  - [Threat protection policies](#): Define threat-protection policies to set the appropriate level of protection for your organization.
- 3 Set up the following scenarios:
  - [Reports](#): View real-time reports to monitor Microsoft Defender for Office 365 performance in your organization.
  - [Threat investigation and response capabilities](#): Use leading-edge tools to investigate, understand, simulate, and prevent threats.
  - [Automated investigation and response capabilities](#): Save time and effort investigating and mitigating threats.

**Throughout the engagement, customers are responsible for:** configuring recommended settings and executing needed remediations; providing project management of your resources; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.

## NOTES

Customers with 150 or more seats of Microsoft Defender for Office 365, Office 365 E5, or Microsoft 365 E5 will be able to use FastTrack to deploy this service.

Microsoft Defender for Office 365 safeguards your organization against malicious threats posed by email messages, links (URLs), and collaboration tools.

Additionally, ongoing management and threat response are outside of the benefits.

For more information:

- Review the [Microsoft Defender for Office 365 service description](#)
- Visit the FastTrack site to make a [Microsoft 365 Setup portal](#).

When you select Defender for Office 365 on the Request for Assistance form on the FastTrack site, you will also receive guidance to leverage Microsoft Defender XDR.

# Microsoft Security Copilot – Embedded Experiences



## WHAT TO EXPECT

Microsoft FastTrack provides onboarding assistance and walkthrough of embedded experiences within Defender, Entra Intune and Purview for FastTrack eligible customers.

Microsoft FastTrack provides guidance to help customers:

- 1 Overview of product and architecture
- 2 Assist customers with onboarding to copilot for security, including role assignment and setting up default environment
- 3 Deploying the following products and features as needed.
  - Microsoft Entra ID P1 and P2
  - Microsoft Intune
  - Microsoft Defender
  - Microsoft PurviewRefer to [FastTrack Benefits](#) description for more details on these workloads
- 4 Walkthrough Security Copilot scenarios / demo of the embedded experiences within Defender, Entra, Intune and Purview, aligned to Generally Available (GA) and Public Preview features. Refer to seismic for GA / Public Preview details for the embedded scenarios.

**Throughout the engagement, customers are responsible for:** configuring recommended settings and executing needed remediations; providing project management of your resources; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.

## NOTES

Customers with 150 or more seats of Microsoft 365 E5, Microsoft 365 E5 Security, Enterprise Mobility + Security E5, or a standalone license across Defender, Purview, Entra and Intune will be able to use FastTrack to learn about the embedded experiences.

Select one of Copilot in Intune, Copilot In Entra, Copilot in Defender and Copilot in Purview in the RFA form to get started.

FastTrack assistance **does not** include:

- Walkthrough of standalone experiences. We are incubating standalone experience and the service is not at-scale. If you want your customer to be considered for incubation, nominate [here](#)
- Standard [FastTrack out of scope](#)
- Project management and execution
- Creation or execution of adoption and change management strategy
- End-user training

# Microsoft Sentinel



## WHAT TO EXPECT

Microsoft Sentinel is a scalable, cloud-native Security Information and Event Management (SIEM) platform, offering an intelligent and comprehensive solution for SIEM and Security Orchestration, Automation, and Response (SOAR). It helps organizations with advanced capabilities for cyberthreat detection, investigation, response, and proactive threat hunting, ensuring a holistic view across the entire enterprise.

Microsoft Sentinel gives a bird's-eye view across the enterprise alleviating the stress of increasingly sophisticated attacks, increasing volumes of alerts, and long resolution time frames.

### Microsoft FastTrack provides guidance to help customers:

- 1 Get an overview of the prerequisites for Microsoft Sentinel deployment
- 2 Plan roles and permissions to streamline Microsoft Sentinel deployment and minimize misconfigurations
- 3 Enable Microsoft Sentinel service and configure data retention, data connectors and analytics rules
- 4 Guidance around cost expectation analysis based on planned configuration
- 5 Gain an understanding of SOC optimization, workbooks, watchlists, UEBA, and Logic app playbooks, and evaluate the incident response capabilities.

**Throughout the engagement, customers are responsible for:** configuring recommended settings and executing needed remediations; providing project management of your resources; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.

## NOTES

Customers with 150+ E5 licenses of Microsoft Defender for Endpoint, Microsoft Defender for Identity, Microsoft Defender for Office and Microsoft Defender for Cloud Apps can use FastTrack to deploy Microsoft Sentinel.

For more information:

- Visit [What is Microsoft Sentinel?](#)
- Request deployment assistance here [Microsoft 365 Setup portal](#).

# Microsoft Defender for Cloud



## WHAT TO EXPECT

Microsoft Defender for Cloud is a cloud-native application protection platform (CNAPP) that's made up of security measures and practices designed to protect cloud-based applications from various cyber threats and vulnerabilities.

When customers enable Defender for Cloud, they gain access to Microsoft Defender XDR.

FastTrack helps protect your resources, improving security with Foundational CSPM and deploying Defender for Servers for comprehensive server protection.

### Microsoft FastTrack provides guidance to help customers:

- 1 Get an overview of Defender for Cloud, including scoping and pre-deployment best practices.
- 2 Understand Azure Role-Based Access Control (RBAC) and help identify the right permissions to assign to security team.
- 3 Review policy management and default policy configuration in Defender for Cloud.
- 4 Enable Defender for Cloud features and onboard resources to desired plans.
- 5 Enable Foundational Cloud Security Posture Management (CSPM) and Microsoft Defender for Servers Plan 1.

**Throughout the engagement, customers are responsible for:** configuring recommended settings and executing needed remediations; providing project management of your resources; attending checkpoint meetings; and managing user communications, developing internal documentation and training, and adhering to internal change management processes.

## NOTES

Customers with 150+ licenses from any of the following E5 plans are eligible for FastTrack support for Microsoft Defender for Cloud:

- Microsoft 365 E5 or A5
- Microsoft 365 E5 Security or A5 Security
- Enterprise Mobility + Security (EMS) E5 or A5
- Microsoft Defender for Endpoint
- Microsoft Defender for Identity
- Microsoft Defender for Cloud Apps
- Microsoft Defender for Office 365 (Plan 2)

For more information:

- Visit [What is Microsoft Defender for Cloud?](#)
- To request FastTrack support for Microsoft Defender for Cloud, use the [MDC nomination form](#)

# Microsoft Edge



## WHAT TO EXPECT

Microsoft FastTrack provides guidance to help customers:

- 1 Develop a Microsoft Edge channel strategy, servicing Edge with Microsoft Endpoint Configuration Manager or Intune.
- 2 Configure Microsoft Edge (using group policies or Intune app configuration and app policies).
- 3 Inventory the list of sites that may be required to run in IE mode.
- 4 Enable Internet Explorer (IE) mode with existing Enterprise Site List.
- 5 Provide adoption kit with communication samples. Customer is responsible for building and executing a change management plan.

**Throughout the engagement, customers are responsible for:** configuring recommended settings and executing needed remediations; providing project management of your resources; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.

## NOTES

FastTrack provides Microsoft Edge guidance for customers with licenses for 150 seats or more of Windows 10/11 Enterprise.

Microsoft Edge is included in Windows 10 and Windows 11.

Additionally, if you have a web app or site that works with Internet Explorer or Google Chrome and you experience compatibility issues, we will help you fix it at no additional cost through the App Assure program.  
<https://aka.ms/AppAssure>

Request assistance at [Microsoft 365 Setup portal](#)

# Microsoft Entra ID



## WHAT TO EXPECT

**Microsoft Entra ID:** Provides user and group management, on-premises directory synchronization, basic reports, self-service password change for cloud users, passwordless authentication, and single sign-on across Microsoft 365 and SaaS applications. Provides the foundation for onboarding online services like Microsoft Entra ID Premium, Microsoft Intune, Microsoft Defender, and Microsoft Purview.

Microsoft FastTrack provides guidance to help customers:

- 1 Add IT admins to Microsoft Entra ID built-in roles for role-based access control (RBAC).
- 2 Determine customer authentication method of PHS (recommended), PTA, or Federation.
- 3 Set up directory synchronization (Connect or Cloud Sync) and device join SSO with Entra join or Entra hybrid join.
- 4 Integrate SaaS applications for SSO and automatic user provisioning from the Microsoft Entra ID app gallery.
- 5 Configure Passwordless authentication including WHfB Cloud Trust, Fido2, and Microsoft Authenticator app.
- 6 For non-Microsoft Entra ID customers, guidance is provided to secure identities using security defaults.
- 7 Configure Microsoft Entra External ID for Business-to-business (B2B) collaboration between Microsoft Entra tenants.

**Throughout the engagement, customers are responsible for:** configuring recommended settings and executing needed remediations; providing project management of your resources; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.

## NOTES

Customers with 150 or more seats of an eligible license can utilize FastTrack to help with deployments.

### Out of scope:

- AD FS deployments

### For more information:

- Visit [Products and Capabilities - FastTrack – Microsoft 365 | Microsoft Learn](#) and review the “Identity Integration” section
- Visit [What is Microsoft Entra ID? - Microsoft Entra | Microsoft Learn](#)
- Visit the FastTrack site to make a request for assistance [Microsoft 365 Setup portal](#)



# Microsoft Entra ID Premium



## WHAT TO EXPECT

**Microsoft Entra ID P1 and P2:** Manage access to cloud apps, help detect potential vulnerabilities affecting your organization's identities, configure policies to respond to suspicious actions, and then take actions to resolve them.

Microsoft FastTrack provides guidance to help customers:

Configure the following:

### [Microsoft Entra ID P1](#)

- Identity and access management capabilities including conditional access, self-service group management, cross-tenant synchronization and multitenant organizations, password protection, self-service password reset, MFA, Application Proxy, migration off AD FS to Entra ID, and other features.
- Internet Access for Microsoft services

### [Microsoft Entra ID P2](#)

- Identity protection and identity governance capabilities including risk-based conditional access, privileged identity management, entitlement management, access reviews, and other features.

**Throughout the engagement, customers are responsible for:** configuring recommended settings and executing needed remediations; providing project management of your resources; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.

## NOTES

Customers with 150 or more seats of an eligible [Microsoft Entra ID Premium license](#) can utilize FastTrack to help with deployments.

### **For more information:**

- Visit [What is Microsoft Entra ID? - Microsoft Entra | Microsoft Learn](#)
- Visit [Microsoft Entra ID - FastTrack - Microsoft 365](#)
- Visit the FastTrack site to make a request for assistance [Microsoft 365 Setup portal](#)

# Microsoft Entra Internet Access



## WHAT TO EXPECT

**Microsoft Entra Internet Access:** Secures access to Microsoft services, SaaS, and public internet apps while protecting users, devices, and data against internet threats. Best-in-class security and visibility, along with fast and seamless access to Microsoft 365 apps. Secure access to public internet apps through the identity-centric, device-aware, cloud-delivered Secure Web Gateway (SWG) of Internet Access.

Microsoft FastTrack provides guidance to help customers:

### 1 Configuration:

- Activating Global Secure Access in the tenant.
- Enabling traffic forwarding profiles for Internet Access, Private Access, and Microsoft traffic.
- Enabling source IP restoration.
- Installing the Global Secure Access client on Windows 10/11, macOS, iOS, and Android clients.

### 2 Microsoft Entra Internet Access:

- Creating and applying web filtering policies.
- Applying web filtering policies to security profiles.
- Creating Conditional Access policies that apply to Microsoft Entra Internet Access.

Throughout the engagement, customers are responsible for: configuring recommended settings and executing needed remediations; providing project management of your resources; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.

## NOTES

Customers with 150 or more seats of an eligible [Microsoft Entra ID Premium license](#) and **25+ licenses** of Microsoft Entra Internet Access or Microsoft Entra Suite can utilize FastTrack to help with deployments.

### Out of scope:

- Network device, virtual local area network (VLAN) configuration, and internal network routing for Microsoft Entra Internet Access.
- Remote network connectivity.
- Third-party security information and event management (SIEM) integration.

### For more information:

- Visit [Products and Capabilities - FastTrack](#)
- Visit [Global Secure Access Overview](#)
- Request deployment assistance here [Microsoft 365 Setup portal](#)

# Microsoft Entra Private Access



## WHAT TO EXPECT

**Microsoft Entra Private Access:** Helps remote users connect to private apps across hybrid and multi-cloud environments, private networks, and data centers from any device and network without requiring a VPN. The service offers per-app adaptive access based on Conditional Access policies, for more granular security than a VPN.

Microsoft FastTrack provides guidance to help customers:

### 1 Configuration:

- Activating Global Secure Access in the tenant.
- Enabling traffic forwarding profiles for Internet Access, Private Access, and Microsoft traffic.
- Enabling source IP restoration.
- Installing the Global Secure Access client on Windows 10/11, macOS, iOS, and Android clients.

### 2 Microsoft Entra Private Access:

- Installing and configuring connectors.
- Publishing applications.
- Creating Conditional Access policies that apply to Microsoft Entra Private Access and Internet Access.

**Throughout the engagement, customers are responsible for:** configuring recommended settings and executing needed remediations; providing project management of your resources; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.

## NOTES

Customers with 150 or more seats of an eligible [Microsoft Entra ID Premium license](#) and **25+ licenses** of Microsoft Entra Private Access or Microsoft Entra Suite can utilize FastTrack to help with deployments.

### Out of scope:

- Network device, virtual local area network (VLAN) configuration, and internal network routing for Microsoft Entra Private Access.
- Remote network connectivity.
- Third-party security information and event management (SIEM) integration.

### For more information:

- Visit [Products and Capabilities - FastTrack](#)
- Visit [Global Secure Access Overview](#)
- Request deployment assistance here [Microsoft 365 Setup portal](#)

# Microsoft Entra ID Governance



## WHAT TO EXPECT

**Microsoft Entra ID Governance:** Helps organizations ensure that the right people have the right access to the right resources through automation, delegation, and increased visibility.

### Microsoft FastTrack provides guidance to help customers:

- Deploying Privileged Identity Management (PIM) (also included in Microsoft Entra ID P2).
- Deploying entitlement management.
- Configuring access reviews.
- Configuring automatic user provisioning to on-premises Active Directory or Microsoft Entra ID for Workday HCM or SAP SuccessFactors through tutorial assistance.
- Configuring attribute writeback from Microsoft Entra ID to Workday HCM or SAP SuccessFactors through tutorial assistance.
- Deploying lifecycle workflow built-in tasks and templates including use of custom security attributes to scope a workflow.

**Throughout the engagement, customers are responsible for:** configuring recommended settings and executing needed remediations; providing project management of your resources; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.

## NOTES

Customers with 150 or more seats of an eligible [Microsoft Entra ID license](#) can utilize FastTrack to help with deployments.

### Out of scope:

- Any API related configuration or customization.
- Any configuration inside of Workday HCM or SAP SuccessFactors portals.
- Configuring advanced attribute mappings.
- Custom expression mapping for provisioning or writeback.
- Data remediation for manual human resource (HR) data.
- Lifecycle workflow custom task extensions and APIs.
- Azure Logic Apps customization or integration.

### For more information:

- Visit [Products and Capabilities - FastTrack](#)
- Visit [Microsoft Entra ID Governance Overview](#)
- Request deployment assistance here [Microsoft 365 Setup portal](#)

# Microsoft Entra Suite



## WHAT TO EXPECT

**Microsoft Entra Suite:** secures access for any identity to any app or resource from anywhere. The Microsoft Entra Suite is a complete Zero Trust user access solution for your workforce.

**Microsoft FastTrack provides guidance to help customers deploy:**

- 1 [Microsoft Entra ID Protection](#): an advanced identity solution that blocks identity compromise in real time using high-assurance authentication methods, automated risk and threat assessment, and adaptive access policies powered by advanced machine learning (also included in Microsoft Entra ID P2).
- 2 [Microsoft Entra ID Governance](#): a complete identity governance and administration solution that automates identity and access lifecycle to ensure that the right people have the right access to the right apps and services at the right time.
- 3 [Microsoft Entra Private Access](#): an identity-centric Zero Trust Network Access that secures access to private apps and resources and reduces operational complexity and cost by replacing legacy VPNs.
- 4 [Microsoft Entra Internet Access](#): an identity-centric Secure Web Gateway (SWG) for SaaS apps and internet traffic that protects against malicious internet traffic, unsafe or non-compliant content, and other threats from the open internet.

**Throughout the engagement, customers are responsible for:** configuring recommended settings and executing needed remediations; providing project management of your resources; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.

## NOTES

Customers with 150 or more seats of an eligible [Microsoft Entra ID Premium license](#) and **25+ licenses** of Microsoft Entra Suite can utilize FastTrack to help with deployments.

### **Out of scope:**

- Microsoft Entra Verified ID
- Out-of-scope scenarios listed for Microsoft Entra Internet Access, Microsoft Entra Private Access, Microsoft Entra ID Governance.
- Visit [Products and Capabilities - FastTrack](#)
- Visit [Microsoft Entra Suite Overview](#)
- Request deployment assistance here [Microsoft 365 Setup portal](#)

# Microsoft Intune



## WHAT TO EXPECT

Microsoft FastTrack provides guidance to help customers:

- 1 Configure identities to be used by Intune by leveraging either your on-premises Active Directory or cloud identities.
- 2 License users and add users to your Intune subscription, define IT admin roles, and create user and device groups.
- 3 Provide App Protection Guidance on:
  - Configuring App Protection Policies for each supported platform
  - Configure Conditional Access Policies for managed apps.
  - Leverage managed-apps usage reports
- 4 Configure your Mobile Device Management (MDM) authority, based on your management needs, including:
  - Set Intune as your MDM authority and configure tests groups to be used to validate MDM management policies.
  - Set up Intune roles (Help desk operator, admins, etc.)
  - Configure MDM management policies and services; set up conditional access policies.
  - Prepare line-of-business (LOB) apps for Intune app protection policies, with guidance on available options.
  - Enroll devices of each supported platform to your Intune or Configuration Manager with Microsoft Intune service.
  - Monitor your connected PCs with Endpoint Analytics.
  - Configure software updates for applicable supported platforms.
  - Deploy Wi-Fi or VPN profiles with certificate-based authentication.
- 5 Set up Windows Autopilot:
  - Configure and set up Microsoft Intune for Windows Autopilot and Microsoft Entra ID dynamic groups. Create and assign devices to Windows Autopilot profiles (e.g., a profile that restricts Local Administrator account creation).
  - Add your Company branding into Microsoft Entra ID.
  - Customize the out-of-box-experience (OOBE) to comply with organization's requirements.
  - Configure MDM auto-enrollment in Microsoft Entra ID and Intune.

**Throughout the engagement, customers are responsible for:** configuring recommended settings and executing needed remediations; providing project management of your resources; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.

## NOTES

When all remediation activities are complete, core onboarding begins. Core onboarding involves service provisioning and tenant and identity integration. It also includes steps for providing a foundation for onboarding online services like Microsoft Entra ID Premium, Intune, and Microsoft Purview Information Protection.

FastTrack does not support Windows 10 classic PC management with Intune. FastTrack only supports Windows 10 device management through Intune mobile device management (MDM).

Setting up Windows Autopilot outside Intune is out of scope for the FastTrack benefit.

# Microsoft Intune Suite



## WHAT TO EXPECT

Microsoft FastTrack provides guidance to help customers:

- 1 Overview of the Intune Suite features and prerequisites.
- 2 License users and add users to your Intune Suite subscription, define IT admin roles, and create user and device groups.
- 3 Configure The Intune Suite features (See notes for in scope features) and test with pilot users
  - Set the features at the tenant level.
  - Navigate the Intune admin portal to locate information on users and devices.
  - Setup Intune Suite roles (Help desk operator, EPM, admins, etc.)
  - Configure features policies and settings.
  - Configure and deploy required apps and agents
  - Enable devices of each supported platform for each feature.
  - Monitor your connected PCs with Advanced Endpoint Analytics.
  - Provide guidance on the integration with 3<sup>rd</sup> party management solutions (Meta Business Manager And Zebra LifeGuard)
  - Validate the solution with test users.
- 4 Provide Guidance on reporting and troubleshooting the solution:
  - Navigate the usage reports for each feature.
  - Navigate the troubleshooting logs for each feature.
  - Monitor feature deployment state.

**Throughout the engagement, customers are responsible for:** configuring recommended settings and executing needed remediations and troubleshooting; providing project management of your resources; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.

## NOTES

When all remediation activities are complete, core onboarding begins.

Microsoft Intune Core onboarding is prerequisite to Intune Suite onboarding. It Includes enabling Microsoft Intune required features provisioning and tenant and identity integration. Refer to the Microsoft Intune Slide.

FastTrack will provide guidance for the following Intune Suite Features:

- Remote Help
- Endpoint Privilege Management
- Microsoft Tunnel for MAM
- Advanced Analytics
- Enterprise App Management.
- Cloud PKI
- Firmware over the Air Updates and Specialty Devices Management.

Refer to the Microsoft FastTrack Products and Services Description page for more information on the In-Scope Out of Scope activities.

# Microsoft Purview Audit and Microsoft Purview eDiscovery



## WHAT TO EXPECT

Microsoft FastTrack provides guidance to help customers:

- 1 Configure [Microsoft Purview eDiscovery \(Premium\)](#), including guidance to:
  - Create a new case
  - Create legal holds
  - Perform advanced searches
  - Add search results to a review set
  - Review and tag documents
  - Export data from the review set
  - Import non-Office 365 data
- 2 Configure [Microsoft Purview Audit \(Premium\)](#), including guidance to:
  - Enable advanced auditing
  - Perform a search audit log UI and basic audit PowerShell commands

**Throughout the engagement, customers are responsible for:** configuring recommended settings and executing needed remediations; custom scripting and coding; providing project management of your resources; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.

## NOTES

Customers with 150 or more seats of an eligible product can use FastTrack to help them enable Microsoft Purview eDiscovery and Microsoft Purview Audit their environment.

For more information:

- Visit [Microsoft Purview eDiscovery](#)
- Visit [Microsoft Purview Audit](#)
- Visit the FastTrack site to make a request for assistance [Microsoft 365 Setup portal](#)

To try Microsoft Purview eDiscovery & Audit, visit the [Trial Playbook](#).



# Microsoft Purview Compliance Manager



## WHAT TO EXPECT

Microsoft FastTrack provides guidance to help customers:

- 1 Review Microsoft Purview Compliance Manager capabilities and understand controls, templates, and improvement actions
- 2 Discuss what assessments are available (secure baseline, premium, universal)
- 3 Start the [premium assessments trial](#) directly from Microsoft Purview Compliance Manager and set up assessments via the recommendation engine
- 4 Configure and complete technical actions in selected assessments (not all, but as many as possible)
- 5 Understand the Microsoft Purview Compliance Manager dashboard for an at-a-glance view of current compliance posture
- 6 Configure/complete technical actions in selected solution areas to improve compliance posture (not all, but as many as possible)

**Throughout the engagement, customers are responsible for:** Configuring recommended settings and executing needed remediations; custom scripting and coding; compliance with industry and regional regulations and requirements; data analysis or investigations; providing project management of your resources; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.

## NOTES

Customers with 150 or more seats of an eligible product can use FastTrack to help them enable Microsoft Purview Compliance Manager in their environment.

For more information:

- Visit [Microsoft Purview Compliance Manager](#)
- Visit the FastTrack site to make a request for assistance [Microsoft 365 Setup portal](#)

To try Microsoft Purview Compliance Manager premium assessments for 90 days free, visit the [Trial Playbook](#).

# Microsoft Purview Data Lifecycle Management



## WHAT TO EXPECT

Microsoft FastTrack provides guidance to help customers:

- 1 Configure eligible services based on recommended settings, including [Microsoft Purview Data Lifecycle Management](#) and [Microsoft Purview Records Management](#)
- 2 Provision your infrastructure
- 3 Configure the following:
  - Manage your content lifecycle
  - Manage content in-place according to your file plan and retention schedule
  - Respond to legal discovery requests
- 4 Set up and leverage these sample scenarios:
  - [Records management](#): Manage regulatory, legal, and business critical records
  - [Retention labels](#): Use labels to help you take the right actions on the right content
  - [Retention policies](#): Proactively decide whether to retain and delete content

Throughout the engagement, customers are responsible to: Configure recommended settings and run needed remediations; Provide project management of your resources; Attend checkpoint meetings; And implement user communications, documentation, training, and change management.

## NOTES

Customers with 150 or more seats of an eligible product can use FastTrack to help them enable Microsoft Purview Data Lifecycle Management in their environment.

For more information:

- Visit [Govern your data with Microsoft Purview Data Lifecycle Management](#)
- Visit the FastTrack site to make a request for assistance [Microsoft 365 Setup portal](#)

To try Microsoft Purview Data Lifecycle Management for 90 days free, visit the [Trial Playbook](#).

# Microsoft Purview Information Protection



## WHAT TO EXPECT

Microsoft FastTrack provides guidance to help customers:

- 1 Configure eligible services based on recommended settings, including:
  - [Purview Information Protection](#) (P1 and P2)
  - [Microsoft Purview Data Loss Prevention \(DLP\)](#)
- 2 Provision your infrastructure.
- 3 Configure your environment, including:
  - Activate and configure the customer tenant
  - Create and set up labels and policies
  - Apply information protection to documents and email
  - Automatically label email in transit and files at rest in O365
  - Automatically classify and label files in Office apps
  - Label files at rest with the scanner
- 4 Leverage sample scenarios:
  - [Publish Sensitivity Labels](#): Classify and protect data in O365 on-premises data stores
  - [DLP for Microsoft Teams](#)
  - [DLP for Endpoints](#)

Throughout the engagement, customers are responsible to: Configure recommended settings and run needed remediations; Provide project management of your resources; Attend checkpoint meetings; And implement user communications, documentation, training, and change management.

## NOTES

Customers with 150 or more seats of an eligible product can use FastTrack to help them enable Microsoft Purview Information Protection in their environment.

For more information:

- Visit [Protect your sensitive data with Microsoft Purview Information Protection](#)
- Visit the FastTrack site to make a request for assistance [Microsoft 365 Setup portal](#)

To try Microsoft Purview Information Protection for 90 days free, visit the [Trial Playbook](#).

# Microsoft Purview Insider Risk Solutions



## WHAT TO EXPECT

Microsoft FastTrack provides guidance to help customers:

- 1 Enable the Office 365 audit log
- 2 Configure settings within [Microsoft Purview Insider Risk Management](#)
- 3 Create insider risk policies using the built-in policy templates
- 4 Configure settings within [Microsoft Purview Communication Compliance](#)
- 5 Create communication compliance policies using customizable templates
- 6 Monitor and review alerts

**Throughout the engagement, customers are responsible for:** configuring recommended settings and executing needed remediations; custom scripting and coding; providing project management of your resources; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.

## NOTES

Customers with 150 or more seats of an eligible product can use FastTrack to help them enable Microsoft Purview Insider Risk Solutions in their environment.

For more information:

- Visit [Microsoft Purview Insider Risk Solutions](#)
- Visit the FastTrack site to make a request for assistance [Microsoft 365 Setup portal](#)

To try Microsoft Purview Insider Risk Solutions for 90 days free, visit the [Trial Playbook](#).

# Microsoft Teams



## WHAT TO EXPECT

Microsoft FastTrack provides guidance to help customers:

- 1 Confirm minimum requirements; configure firewall ports; set up DNS; confirm Teams is enabled on your Office 365 tenant; and enable or disable user licenses.
- 2 Distribute the Teams client.
- 3 Enable Microsoft Teams Rooms (in available markets), including:
  - Remote assistance with service side configuration of certified Microsoft Teams Rooms devices
  - Creation of online accounts for supported telephony and conference room devices listed in [the Teams devices catalog](#).
- 4 Enable Direct Routing for up to 10 sites, including media bypass, local media optimization, and Session Border Controller (SBC) config review.
- 5 Enable Audio Conferencing, including setting up conference bridge default settings and assigning conference bridges to licensed users.
- 6 Enable Phone System and Calling Plans (in available markets), including:
  - Configure cloud voice and set up accounts and bridge lines for audioconferencing.
  - Assign numbers to licensed users.
  - Port local numbers UI up to 999; and support local number porting over 999.
- 7 Enable Teams Town Hall by setting up the organization and integrating into Microsoft Stream.

**Throughout the engagement, customers are responsible for:** configuring recommended settings and executing needed remediations; providing project management of your resources; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.

## NOTES


### **Direct Routing for GCC High and DoD environments**

Phone System and Audio Conferencing for GCC High and DoD environments are being delivered via Direct Routing. For more information, see the service level documentation here:

- [Phone System availability in GCC High and DoD](#)
- [Audio Conferencing with Direct Routing for GCC High and DoD](#)

Delivered by Microsoft or approved FastTrack Ready Partners and included in your [eligible](#) Microsoft 365 subscription of 150+ licenses, at no additional cost

[www.microsoft.com/FastTrack](http://www.microsoft.com/FastTrack)

Additional detail on data migration 

# OneDrive for Business



## WHAT TO EXPECT

For OneDrive for Business, the steps depend on if you're currently using SharePoint, and if so, which version.

**Microsoft FastTrack provides guidance to help customers:**

- 1 Identify the on-premises SharePoint version; integration options; review on-premises and online network infrastructure and bandwidth; identify synchronization and identity options.
- 2 Prepare the on-premises environment for OneDrive for Business deployment:
  - Identify the correct OneDrive for Business sync client.
  - Configure the DNS, network ports, and firewall.
- 3 Plan and implement the appropriate rollout option: just-in-time or staged (sequenced and phased).
- 4 Install SharePoint 2013 SP1\*, plan and implement sync and identity requirements, and identity OneDrive for Business sync client.
- 5 Configure SharePoint Online hybrid OneDrive for Business redirection (SharePoint 2013 and SharePoint 2016 only). Discuss with your FastTrack Specialist on data migration strategy and assistance through FastTrack Migration Team
- 6 Assign user licenses; redirect My Sites and personal document libraries to Office 365 (as needed\*); and set up SharePoint Online audiences to control and govern who gets OneDrive for Business.
- 7 Deploy the OneDrive for Business sync client.

**Throughout the engagement, customers are responsible for:** configuring recommended settings and executing needed remediations; providing project management of your resources; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.

## SOURCE ENVIRONMENT

File shares (SMB file shares on devices supporting SMB 2.0 onward)

Google Drive and Google Shared Drives

Dropbox

Box (Starter, Business, Enterprise)

**Note:** FastTrack only migrates to active Office 365 drives.

[Additional detail on data migration](#) >

\*SharePoint 2013 requirements

# Project Online



## WHAT TO EXPECT

Microsoft FastTrack provides guidance to help customers:

- 1 Review subscription plans.
- 2 Verify basic SharePoint functionality.
- 3 Add the Project Online service to your tenant (including adding subscriptions to users).
- 4 Set up the Enterprise Resource Pool (ERP).
- 5 Add users to Project Online including ERP Sync.
- 6 Verify basic Project Online functionality by creating a project.

**Throughout the engagement, customers are responsible for:** configuring recommended settings and executing needed remediations; providing project management of your resources; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.

## NOTES

For Office 365 US Government plans, Project Online is not included, but can be purchased as a separate add-on. Project Online includes Project Online Desktop Client as a part of the subscription.

Refer to [Docs](#) for additional information on Project Online Professional and Project Online Premium.

# SharePoint Online



## WHAT TO EXPECT

Microsoft FastTrack provides guidance on data migration to Office 365 by using a combination of tools and documentation and by performing configuration tasks where applicable and feasible.

Microsoft FastTrack provides guidance to help customers:

- 1 Configure firewall ports and set up DNS.
- 2 Provision users and licenses and enable site creation for your SharePoint Online admin.
- 3 Demonstrate the creation of site collections, secure content, and the managing of permissions.
- 4 Enable personal sites and social features; and configure SharePoint Online features.
- 5 Configure SharePoint hybrid features, like hybrid search, hybrid sites, hybrid taxonomy, content types, hybrid self-service site creation (SharePoint Server 2013 only), extended app launcher, hybrid OneDrive for Business, and extranet sites. Discuss with your FastTrack Specialist on data migration strategy and assistance through FastTrack Migration Team.
- 6 Use tools and automation to:
  - Configure on-premises cloud search service applications.
  - Configure trust between SharePoint on-premises and cloud environments.

Refer to the [Office 365 GCC High and DoD restrictions](#) for SharePoint Online.

**Throughout the engagement, customers are responsible for:** configuring recommended settings and executing needed remediations; providing project management of your resources; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.


## SOURCE ENVIRONMENT

File shares (SMB file shares on devices supporting SMB 2.0 onward)

Google Drive and Google Shared Drives

Dropbox

Box (Starter, Business, Enterprise)

Additional detail on data migration 



# Universal Print



## WHAT TO EXPECT

FastTrack can help simplify your deployment of Universal Print, by providing an overview of both the IT admin and user experience. This includes helping to understand how Universal Print works, what to expect on the user's end, navigating the management portal, basic subscription and license requirements and how to register printers.

Microsoft FastTrack provides guidance to help customers:

- 1 Onboarding and configuring Universal Print
- 2 Universal Print connector
- 3 Universal Print-ready printers
- 4 Deploying printers with Microsoft Endpoint Manager
- 5 Printer and print job management
- 6 Configuring the Universal Print PowerShell module

**Throughout the engagement, customers are responsible for:** Ongoing partner integrations, third-party app virtualization and deployment, creating custom scripts with the Universal Print PowerShell module and configuring Windows servers for printing.

## NOTES

### Resources:

Universal Print is a modern print solution that organizations can use to manage their print infrastructure through cloud services from Microsoft.

Universal Print is a Microsoft 365 subscription-based service that organizations use to centralize print management through the Universal Print portal. It's fully integrated with Microsoft Entra ID and supports single sign-on scenarios.

[Universal Print Documentation](#)

[Universal Print Guided Simulation](#)

[Deploying printers with Microsoft Intune](#)

# Windows 365



## WHAT TO EXPECT

Microsoft FastTrack provides the following guidance to help customers onboard to the service:

- 1 Assign licenses to users.
- 2 Create and modify on-premises network connections (OPNCs).
- 3 Add and delete device images, including standard Azure Marketplace gallery images and custom images. Some guidance may be provided around deploying language packs using the Windows 365 language installer script.
- 4 Create, edit, and delete provisioning policies.
- 5 Assist with dynamic query expressions for dynamic groups and filtering.
- 6 Deploy Windows Update policies for Cloud PCs using Intune.
- 7 Deploy apps (including Microsoft 365 Apps for enterprise and Microsoft Teams with media optimizations) to Cloud PCs using Intune.
- 8 Secure Cloud PCs, including Conditional Access, multi-factor authentication (MFA), and manage Remote Desktop Protocol (RDP) device redirections.
- 9 Manage Cloud PCs on Microsoft Endpoint Manager, including remote management, reprovision, resizing, and end grace period.

**Note:** See the **Microsoft 365 Defender** and **Microsoft Defender for Endpoint** sections in [Security and Compliance](#) for details about Microsoft Defender for Endpoint and the security baseline scope as it applies to Windows 365.

**Throughout the engagement, customers are responsible for:** Project management of the customer's Windows 365 deployment, on-site support, creation of Azure subscription features including Azure Virtual Networks (VNETs), ExpressRoute, and Site-to-Site (S2S) VPN, customizing images for a Cloud PC on behalf of customers, standalone use of Configuration Manager for managing Cloud PCs, deploying Windows updates for Cloud PCs using Configuration Manager, migrating virtual desktop infrastructure (VDI) or Azure Virtual Desktop virtual machines to Windows 365, migrating Configuration Manager or Microsoft Deployment Toolkit (MDT) images to Azure, and migrating user profiles to or from Windows PCs.

## NOTES

Windows 365 Enterprise, Government and Frontline onboarding assistance is available to FastTrack-eligible customers that also have one or more trial or paid Windows 365 Enterprise licenses.

Source environment expectations - You must have the following before onboarding:

- Windows 365 Enterprise [licensing requirements](#).
- An Azure subscription associated with the Microsoft Entra ID tenant where licenses are deployed.
- VNet deployed in a region that is supported for Windows 365. The VNet should:
  - Have sufficient private IP addresses for the number of Cloud PCs you want to deploy.
  - Have connectivity to Active Directory.
  - Be configured with custom DNS servers (in the VNet properties) that can resolve Active Directory DNS records.
- An administrative account that has both Azure subscription owner and Windows 365 admin roles.

# Windows Autopatch



## WHAT TO EXPECT

### Microsoft FastTrack provides guidance to help customers enable Windows Autopatch

- 1 Windows Autopatch is a cloud service that manages update policies and configurations automatically for enrolled devices, keeping Windows, Microsoft 365, and Microsoft Edge applications up to date. With Autopatch, IT admins select devices to be enrolled in Autopatch, and the service schedules updates and deploys them progressively.
- 2 Windows Autopatch requires Windows 10/11 Enterprise E3 (or higher) to be assigned to your users. Additionally, Microsoft Entra ID Premium and Microsoft Intune are required.
- 3 The typical customer journey to onboarding to Autopatch includes the following steps:
  - **Understanding** the value and functionality that Autopatch provides to determine if it is a good fit for your environment.
  - **Discover** whether your tenant is ready to onboard to the Autopatch service by running Autopatch Readiness Assessment Tool.
  - **Plan** for any required changes based on the results of the Readiness Assessment Tool.
  - **Prepare** for and execute any required changes to your tenant and infrastructure including those identified in the Readiness Assessment Tool. Examples: configuring co-management if necessary, enabling Hybrid Microsoft Entra joined if necessary, configuring Delivery Optimization if necessary, and identifying the set of devices that will be piloted with Autopatch.
  - **Onboard** your tenant and register the devices previously identified.
  - **Validate** that your devices have registered into the service and passed device readiness checks. Additionally, validate that devices are getting updates once they are applicable to your registered devices.
  - **Pilot** Autopatch with a representative group of devices from your environment and once comfortable expand your pilot to additional devices.
- 4
  - Autopatch is compatible with content optimization services such as Delivery Optimization and Microsoft Connected Cache.
  - FastTrack can offer high-level guidance on network optimization strategies.
  - Customers should consider peer-to-peer content sharing solutions, efficient internet egress, and content distribution for home office and corporate locations.

Throughout the engagement, customers are responsible for: Managing updates and can use these tools to help keep devices in their organization productive and protected.

## NOTES

### Windows Autopatch resources

- [TechCommunity content \(including blog posts and FAQ\)](#)
- [Demonstration site](#)
- [Licenses and entitlements](#)

### Windows Autopatch how-to videos

- [Enroll in Windows Autopatch](#)
- [Resolve issues with device "not registered" or "not ready" in Windows Autopatch](#)
- [Add devices to the test ring in Windows Autopatch](#)
- [Generate reports from Windows Autopatch](#)

Request assistance at [www.microsoft.com/FastTrack](http://www.microsoft.com/FastTrack).

# Windows Autopilot



## WHAT TO EXPECT

FastTrack can help you through simplifying your device provisioning with Windows Autopilot and Intune, leading your organization towards a cloud native end state.

Microsoft FastTrack provides guidance to help customers:

- 1 Configure and set up Microsoft Intune for Windows Autopilot.
- 2 Configure Microsoft Entra ID dynamic groups.
- 3 Add your company branding Microsoft Entra ID.
- 4 Create and assign devices to Windows Autopilot profiles (e.g., a Windows Autopilot profile that restricts Local Administrator account creation).
- 5 Customize the out-of-box-experience (OOBE) to comply with organization's requirements.
- 6 Configure MDM Auto-enrollment in Microsoft Entra ID and Intune.

**Throughout the engagement, customers are responsible for:** configuring recommended settings and executing needed remediations; providing project management of your resources; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.

## NOTES

FastTrack recommends the following Autopilot scenario:

### **Microsoft Entra joined:**

Devices join Microsoft Entra ID and enroll in Intune.

For the list of OEMs and resellers that support Autopilot, see the "Participant device manufacturers" and "Participant device resellers" sections of the Windows Autopilot information page: <https://aka.ms/windowsautopilot>

Supported deployments/upgrades: In-Place Upgrade, Wipe and Reload, and Autopilot for existing devices using SCCM. We also support autopilot pre-provisioning and Hybrid AD Join.

# Windows client deployment

## WHAT TO EXPECT

Microsoft FastTrack provides deployment and update guidance for moving from Windows 10 to Windows 11 and deployment planning for a Windows 11 pilot. Guidance is also provided for keeping endpoints up to date, moving to Windows Autopatch, and updating guidance for Microsoft 365 Apps and Microsoft Edge.

### Microsoft FastTrack provides guidance to help customers:

- 1 Deploy Windows 11 Enterprise using Microsoft Intune or Windows Autopilot.
- 2 Update Windows 10 Pro/Enterprise to Windows 11 in place using Windows Updates policies and Autopatch.
- 3 Providing guidance to help your organization stay up to date with Windows 11 Enterprise and Microsoft 365 Apps.
- 4 Service and update Windows 11 using Windows Update policies and Autopatch.
- 5 Cloud-attach Configuration Manager to Intune, guidance on how to move management workloads to Intune and deploying cloud-native Windows devices using Intune.

**Throughout the engagement, customers are responsible for:** configuring recommended settings and executing needed changes and remediations; providing project management of your resources; engaging all relevant project stakeholders with the FastTrack teams; attending checkpoint meetings; and implementing user communications, documentation, training, and change management.

## SOURCE ENVIRONMENT

For PC upgrade, you must meet these requirements:

- Source OS: Windows 10 Pro/Enterprise
- Target OS: Windows 11 Pro/Enterprise
- Devices must meet target OS hardware requirements

Visit the FastTrack site to make a request for assistance [Microsoft 365 Setup portal](#)

# The FastTrack Engagement



# 1. Plan



## KEY TASKS

	Microsoft FastTrack responsibilities	Customer responsibilities
1	Work with customer to understand intent, organizational goals, and usage plans for the service(s).	Provide key business scenarios and success criteria for organization deployment and adoption.
2	Conduct kick-off meeting; clarify roles and responsibilities.	Identify and enlist core planning team.
3	Provide guidance on Success Plan creation: Scope (including services to onboard and data to migrate), timelines, and contacts.	Build Success Plan. Define scope, timelines, and contacts.
4	Provide guidance needed for project governance. Participate in checkpoints.	Manage and lead project governance and establish checkpoints.
5	Provide guidance to customer on adoption best practices and best way to drive usage.	Begin creating the adoption plan and continue those efforts throughout the engagement process.

## OUTCOME

**Signed-off Success Plan.**

## NOTES

Sign in to the [Microsoft admin center\\*](#) or visit the FastTrack site [Microsoft 365 Setup portal](#) to request deployment assistance from FastTrack.

*\*Requires M365 tenant admin permissions.*



## 2. Assess



### KEY TASKS

	Microsoft FastTrack responsibilities	Customer responsibilities
1	Align resources for online meetings and conduct Discovery Workshop.	Participate in Discovery Workshop and all assessment meetings.
2	Run tools to gather environment data and estimate bandwidth requirements.	Provide the FastTrack team with access and permissions to necessary infrastructure.
3	Assess results and create remediation checklist, plan, timeline, and checkpoints.	Contribute to the remediation plan, timeline, and checkpoints. Sign off on checklist.
4	Build schedule for onboarding and migration (if applicable).	Identify appropriate onboarding stakeholders and timing.

### TIPS

- Ensure key stakeholders attend the Discovery Workshop, which addresses:
  - Browsers, OSs, applications
  - DNS, network, and basic infrastructure
  - Identity management
  - Services to enable and adoption guidance
  - Mailbox or files to migrate (if needed)
- Engage security, compliance, cyber, and audit teams.

### OUTCOME

Remediation plan that brings source environment to the minimum requirements for successful onboarding and migration (if needed).





# 3. Remediate



## KEY TASKS

### Microsoft FastTrack responsibilities

- 1 Conduct online remediation checkpoint meetings to review progress of activities and success planning.
- 2 Guide customer through assessment tools to identify and remediate issues and interpret results.
- 3 Verify the outcomes of remediation activities to make sure customer is ready to proceed.

### Customer responsibilities

- Participate in checkpoint meetings.
- Perform tasks to remediate source environment.
- Check source environment post-remediation.

## TIPS

- Prioritize the services you plan to enable based on your business needs.
- Make sure that skilled people are available when they are needed.
- May need to allocate training time for individuals performing remediation.

## OUTCOME

Environment ready for onboarding.



# 4. Enable



## KEY TASKS

	Microsoft FastTrack responsibilities	Customer responsibilities
<b>4A</b>	Provide guidance on core enablement activities.	Perform core enablement activities.
<b>4B</b>	Provide guidance on identity integration activities.	Perform identity integration activities.
<b>4C</b>	Provide guidance on service enablement activities.	Perform service enablement activities.

## OUTCOME

Key enablement tasks have been completed.

### 4A. Core enablement

KEY TASKS	Customer responsibilities	SOURCE ENVIRONMENT
<p><b>1</b> Provide guidance on provisioning and integration.</p> <p><b>2</b> Provide guidance on activating the tenant and configuring test client.</p> <p><b>3</b> Provide guidance on adding domain and verifying connectivity.</p> <p><b>4</b> Provide guidance on transitioning pilot users.</p> <p><b>5</b> Provide guidance on configuring TCP/IP ports, protocols, firewall, and DNS for eligible services.</p> <p><b>6</b> Provide guidance on validation.</p> <p><b>7</b> Participate in success planning checkpoint meetings with customer.</p>	<p>Ensure that your core enablement activities involve service provisioning and tenant and identity integration.</p> <p>Activate tenant and configure test client.</p> <p>Add domain in tenant and verify ownership.</p> <p>Transition pilot users.</p> <p>Configure TCP/IP ports, protocols, firewall, and DNS for eligible services.</p> <p>Validate network connectivity.</p> <p>Continue to have success planning checkpoint meetings with your FastTrack Manager to evaluate progress against goals and determine what further assistance you need.</p>	<p>Active Directory forests with the functional level set to Windows Server 2003 onward, with one of the following forest configurations:</p> <ul style="list-style-type: none"> <li>A single Active Directory forest.</li> <li>A single Active Directory account forest and resource forest (Exchange and/or Lync 2013, or Skype for Business) topologies.</li> <li>Multiple Active Directory account forests and resource forest (Exchange and/or Lync 2013, or Skype for Business) topologies.</li> <li>Multiple Active Directory account forests with one of the forests being a centralized Active Directory account forest that includes Exchange and/or Lync 2013, or Skype for Business.</li> <li>Multiple Active Directory account forests, each with its own Exchange organization.</li> </ul>

**OUTCOME**  
Tenant and service workloads are ready.

### 4B. Identity integration

KEY TASKS	Customer responsibilities	NOTES
<p><b>1</b> Provide guidance on setting up and verifying directory sync.</p> <p><b>2</b> Provide guidance on implementing and provisioning online identities.</p> <p><b>3</b> Provide guidance on configuration and validation.</p> <p><b>4</b> Provide guidance on conversion, configuration, and validation.</p> <p><b>5</b> Provide guidance on implementation.</p>	<p>Use Microsoft Entra ID Connect to set up and verify directory sync.</p> <p>Implement and provision online identities without directory sync.</p> <p>Use Microsoft Entra ID Connect to set up and verify directory sync.</p> <p>Install AD FS farm, AD FS Proxy/WAP, SSL certificate (if needed).</p> <p>Configure and validate AD FS farm and WAP.</p> <p>Convert registered domains, configure and validate federation.</p> <p>Implement Client Access Policies on AD FS (if needed).</p>	<ul style="list-style-type: none"> <li>AD stands for Active Directory.</li> <li>AD FS stands for Active Directory Federation Services.</li> <li>WAP stands for Web Application Proxy.</li> <li>SSL stands for Secure Sockets Layer.</li> <li>Enablement for one or more eligible services can begin once core enablement is finished.</li> </ul>

**OUTCOME**  
Accounts are created in the tenant, are ready, and have access.

### 4C. Service enablement

KEY TASKS	Customer responsibilities	NOTES
<p><b>1</b> Provide guidance on ERM and SaaSID.</p> <p><b>2</b> Provide guidance on service provisioning.</p> <p><b>3</b> Provide guidance on AutoDiscover and UPV.</p> <p><b>4</b> Provide guidance on verifying mailbox and deployment.</p> <p><b>5</b> Provide guidance on migration approach.</p>	<p>Configure ERM and SaaSID.</p> <p>Set up core provisioning (including SaaSID).</p> <p>Create or update AutoDiscover and UPV.</p> <p>Configure and verify mailbox and deployment.</p> <p>Finalize migration approach, if applicable.</p>	<p>FastTrack provides guidance on the following services: Microsoft 365 Apps, Exchange Online, OneDrive for Business, SharePoint for Business, Skype for Business, Microsoft Teams, Microsoft Viva, Microsoft Yammer, and more.</p> <p>ERM stands for Exchange Remote Services. UPV stands for Unified Provisioning Framework.</p>

**OUTCOME**  
Tenant and service workloads are provisioned.



# 4A. Core enablement



## KEY TASKS

Microsoft FastTrack responsibilities	Customer responsibilities
1 Provide guidance on provisioning and integration.	Ensure that your core enablement activities involve service provisioning and tenant and identity integration.
2 Provide guidance on activating the tenant and configuring test client.	Activate tenant and configure test client.
3 Provide guidance on adding domain and verifying ownership.	Add domain in tenant and verify ownership.
4 Provide guidance on transitioning pilot users.	Transition pilot users.
5 Provide guidance on configuring TCP/IP ports, protocols, firewall; and DNS for eligible services.	Configure TCP/IP ports, protocols, firewall; and DNS for eligible services.
6 Provide guidance on validation.	Validate network connectivity.
7 Participate in success planning checkpoint meetings with customer.	Continue to have success planning checkpoint meetings with your FastTrack Manager to evaluate progress against goals and determine what further assistance you need.

## OUTCOME

Tenant and service workloads are ready.

## SOURCE ENVIRONMENT

Active Directory forests with the functional forest level set to Windows Server 2003 onward, with one of the following forest configurations:

- A single Active Directory forest.
- A single Active Directory account forest and resource forest (Exchange and/or Lync 2010, Lync 2013, or Skype for Business) topologies.
- Multiple Active Directory account forests and resource forest (Exchange and/or Lync 2010, Lync 2013, or Skype for Business) topologies.
- Multiple Active Directory account forests with one of the forests being a centralized Active Directory account forest that includes Exchange and/or Lync 2010, Lync 2013, or Skype for Business.
- Multiple Active Directory account forests, each with its own Exchange organization.

# 4B. Identity integration



## KEY TASKS

Microsoft FastTrack responsibilities	Customer responsibilities
<b>Identity integration using online setup:</b>	
1 Provide guidance on setting up and verifying directory sync.	Use Microsoft Entra ID Connect to set up and verify directory sync.
2 Provide guidance on implementing and provisioning online identities.	Implement and provision online identities without directory sync.
<b>Identity integration using federated setup:</b>	
1 Provide guidance on validation.	Use Microsoft Entra ID Connect to set up and verify directory sync.
2 Provide guidance on installation.	Install ADFS farm, ADFS Proxy/WAP, SSL certificate (if needed).
3 Provide guidance on configuration and validation.	Configure and validate ADFS farm and WAP.
4 Provide guidance on conversion, configuration, and validation.	Convert registered domains, configure and validate federation.
5 Provide guidance on implementation.	Implement Client Access Policies on ADFS (if needed).

## OUTCOME

Accounts are created in the tenant, are ready, and have access.

## NOTES

- AD stands for Active Directory.
- ADFS stands for Active Directory Federation Services.
- WAP stands for Web Application Proxy.
- SSL stands for Secure Sockets Layer.
- Enablement for one or more eligible services can begin once core enablement is finished.



# 4C. Service enablement



## KEY TASKS

	Microsoft FastTrack responsibilities	Customer responsibilities
1	Provide guidance DNS and firewall.	Configure DNS and firewall.
2	Provide guidance on user provisioning.	Set up user provisioning (including licensing).
3	Provide guidance on Autodiscover and SPF.	Create or update Autodiscover and SPF.
4	Provide guidance on configuration and deployment.	Configure settings and deploy client.
5	Provide guidance on migration approach.	Establish migration approach, if applicable.

## NOTES

FastTrack provides guidance on the following services: Microsoft 365 Apps, Exchange Online, SharePoint Online, OneDrive for Business, Skype for Business, Microsoft Teams, Microsoft Entra ID Premium, and more.

DNS stands for Domain Name Server.

SPF stands for Sender Policy Foundation.

## OUTCOME

Tenant and service workloads are provisioned.

# 5A. Migrate email



## WHAT'S INCLUDED

### What mail environments are migrated as part of the FastTrack service?

- Exchange 2010 onward (single or multiple AD forests with single or multiple Exchange organizations).
  - All source environments must be on the latest service packs (SP) and rollup (RU)/cumulative update (CU) level.
- A single G Suite environment (Gmail, Contacts, and Calendar only)
- For education organizations, customers who have existing Microsoft 365 or Office 365 A3 and A5 plans for faculty and staff, can also receive migration assistance for their students. Microsoft 365 or Office 365 A1 student migrations are eligible when originating from Exchange or Gmail and can be migrated with faculty/educators or following faculty/educators' migrations.

Source	Examples of what's included	Examples of what's NOT included
<b>Exchange</b>  Note: Exchange 2010 forward will migrate personal archives, but not archived data from PST files.	<ul style="list-style-type: none"><li>• Emails</li><li>• Server-side mailbox rules</li><li>• Delegates</li><li>• Mailbox contacts</li><li>• Calendar</li><li>• Tasks</li><li>• Signatures</li><li>• Personal archive migrated with the user's mailbox</li><li>• Recoverable items</li><li>• Microsoft Rights-Managed/Encrypted emails*</li></ul>	<ul style="list-style-type: none"><li>• Public folders</li><li>• Any email that exceeds the message size limit</li><li>• Journaling archive or any third-party archive solution</li><li>• Archive data from Personal Storage Table (PST) files</li><li>• Corrupted items</li><li>• Inactive mailboxes</li><li>• Client-side mailbox rules</li></ul>
<b>G Suite</b>	Varies based on source, but typically includes mailbox, contacts, calendar, rules and for some source environments, tasks.	Varies based on source, but typically includes archives, rules, signatures, emails that exceed the message size limit, encrypted emails, and so forth.

## NOTES

- Carefully consider what needs to be moved. Scope includes what is being moved and number of users.
- If moving from Exchange on-premises to the cloud, you may consider moving to a hybrid configuration.
- It's critical that the licenses are locked before mail migration begins.
- Environment remediation tasks must be completed before migration can start.
- Customers are responsible for scheduling events.
- Throughput is determined by many factors including network bandwidth and source server performance. Customers are encouraged to do tests and pilot migrations to determine throughput.
- Review the [FastTrack Service Description](#) for a complete list of what's in scope along with roles and responsibilities.
- See the [FastTrack Service Description](#) for a complete list.

# 5B. Migrate data



## WHAT'S INCLUDED

Destination	Source environment	
<b>SharePoint Online / Microsoft Teams channel</b>	<ul style="list-style-type: none"> <li>File shares (Server Message Block [SMB]) file shares on devices supporting SMB 2.0 onward)</li> <li>Google Drive and Google Shared Drives</li> <li>Box (Starter, Business, Enterprise)</li> <li>Dropbox</li> </ul>	
<b>OneDrive for Business</b>	<ul style="list-style-type: none"> <li>File shares (Server Message Block [SMB]) file shares on devices supporting SMB 2.0 onward)</li> <li>Google Drive and Google Shared Drives</li> <li>Box (Starter, Business, Enterprise)</li> <li>Dropbox</li> </ul>	
Source	Examples of what's included	Examples of what's NOT included
<b>SharePoint Online</b>  *See FastTrack Service description for a complete list.	<ul style="list-style-type: none"> <li>Documents</li> <li>File and folder structure</li> <li>Files under 15GB</li> <li>Document meta data (created date, modified date, created by, etc.)</li> <li>Select level of permissions*</li> </ul>	<ul style="list-style-type: none"> <li>Previous versions</li> <li>Ownership history</li> <li>Advanced permissions*</li> <li>Hidden shares</li> <li>Files or folders exceeding current SharePoint Online restrictions and limitations</li> <li>Box tags, advanced metadata, etc.</li> </ul>
<b>OneDrive for Business</b>  *See FastTrack Service description for a complete list.	<ul style="list-style-type: none"> <li>Documents</li> <li>File and folder structure</li> <li>Files under 15GB</li> <li>Document meta data (created date, modified date, created by, etc.)</li> <li>User and group level file and folder permissions*</li> </ul>	<ul style="list-style-type: none"> <li>Previous versions</li> <li>Ownership history</li> <li>Advanced permissions*</li> <li>Selected file types (e.g., Google photos, maps, and other connected apps)</li> <li>Files or folders exceeding current OneDrive for Business restrictions and limitations</li> <li>Box tags, advanced metadata, etc.</li> </ul>

## NOTES

- Rationalize what to move. It's common that an organization lets content grow ungoverned. This can impact migration velocity and user experience.
- Review your needs/requirements for file governance and security.
- Customers are responsible for scheduling events.
- Recommend migrating individuals that collaborate at the same time.
- Start migration early. Migration throughput is based on factors such as: corpus size, number of items, number of users, network bandwidth, to name a few.
- Review the FastTrack Service description for a complete list of what's in scope along with roles and responsibilities.

# 6. Adopt



## KEY TASKS

### Microsoft FastTrack responsibilities

- 1 Conduct Success Workshop and ensure awareness of adoption success factors (stakeholders, scenarios, awareness and communication, training, roll-out planning).
- 2 Provide best practices and guidance on both communications and training plans and activities.
- 3 Provide content to help with adoption:
  - Adoption methodology and plan templates
  - Office usage scenarios
  - Awareness kit
  - Champions Program guide
  - User training
  - Help Desk guidance
- 4 Check in regularly as you build your adoption approach.

### Customer responsibilities

- Build a plan that addresses success factors and focuses on communication and training.
- Execute communication and training plans to generate awareness and excitement, as well as ensure new users have the information/skills necessary to get the most out of the services purchased.
- Leverage FastTrack documentation to help with adoption methodology; build a Champions Program and/or an early adoption program; plan for Help Desk support, including training and documentation for Help Desk personnel; etc.

## OUTCOME

Usage numbers are achieving stated goals.

## NOTES AND RESOURCES

Relevant [Productivity Library](#) scenarios and resources to:

- Make data-driven decisions
- Create better work habits
- [Review additional information on user adoption services](#)

FastTrack can introduce you to partners who can provide additional help (if required).

As part of core FastTrack engagements, FastTrack will provide customers with guidance, content, and best practices on how to plan for successful Microsoft 365 adoption.

Resources:

- [Microsoft 365 Adoption Guide](#)
- [Microsoft 365 learning pathways](#)
- [Early Adopter Program Guide](#)
- [Build a Champions Program](#)



# Appendix

# Microsoft 365 FastTrack eligibility and supported services

## FastTrack for Microsoft 365 (150+ seats)

Exchange Online, Microsoft 365 Apps, Microsoft Edge, Microsoft Intune, Microsoft Teams, OneDrive for Business, Project Online, SharePoint Online, Microsoft Viva

Microsoft Entra ID Premium, Microsoft Windows 10, Windows 11, Azure Virtual Desktop, Purview, Information Protection, Microsoft 365 Apps, App Assure, Microsoft 365 Defender, Microsoft Defender for Cloud Apps, Microsoft Defender for Endpoint, Microsoft Defender for Identity, Microsoft Defender for Office 365, Microsoft Information Governance, Microsoft Information Protection

Data migration (500+): Mail (Google, Exchange) and Files (Google Drive, Google Shared Drives, Dropbox, Box, SMB 2.0 file share)