Quest®

Quest® On Demand Migration

User Guide

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CAUTION: A CAUTION icon indicates potential damage to hardware or loss of data if instructions are not followed.

IMPORTANT, **NOTE**, **TIP**, **MOBILE**, or **VIDEO**: An information icon indicates supporting information.

On Demand Migration User Guide
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1

About On Demand Migration

Quest® On Demand Migration cloud application lets you create migration projects to perform the following:

Accounts and User Data Migration

- Analyze the structure of your Microsoft Azure Active Directory and get reports on the problems that might adversely affect the migration.
- Migrate Azure AD users, groups, and the related information between tenants.
- Migrate hybrid accounts synchronized with on-premises AD
- Map the existing accounts in the source and target tenants for further resource processing.
- Grant migrated accounts access to source tenant's resources and applications.
- Provide robust project management interface and in-depth progress reporting.
- Provide coexistence services for transition period before migration process will be completed:
    - Address Rewrite Service to change the message header as if the target mailbox is already used by sender.

Mail migration

- Migrate Microsoft Office 365 mailboxes and share free/busy information between tenants.

Content Migration

OneDrive for Business

- Analyze OneDrive for Business on your source tenant
- Transfer OneDrive for Business data and settings.

Public Folders

- Analyze Public Folders on your source tenant and get hierarchy information, content information and email addresses for mail-enabled public folders
- Migrate Public Folders and the related information between tenants
- Provide robust Public Folders migration management interface and in-depth progress reporting.

Microsoft SharePoint

- Analyze SharePoint on your source tenant
- Map existing SharePoint sites (previously site collections) in the source and target tenants for further processing
- Migrate SharePoint sites (previously site collections) to the target tenant

- Provide robust SharePoint migration management interface and in-depth progress reporting.

Microsoft Teams

- Analyze Microsoft Teams on your source tenant
- Create Microsoft 365 Groups with Teams functionality on the target tenant
- Provision Microsoft Teams on the target tenant
- Migrate Microsoft teams including content to the target tenant
- Provide robust Microsoft Teams migration management interface and in-depth progress reporting.

On Demand Migration is a part of Quest On Demand – a single SaaS console for managing your cloud environment in Microsoft Azure. For more information, see Quest On Demand documentation.

Signing up for Quest On Demand

To get access to On Demand Migration, you need to sign up for the Quest On Demand service. For that, go to Quest On Demand and use one of the following options:

- Sign up using the existing Quest account (http://support.quest.com/technical-documents/on-demand-global-settings/current/user-guide/signing-up-for-quest-on-demand)
- Create a new Quest account and sign up for Quest On Demand (http://support.quest.com/technical-documents/on-demand-global-settings/current/user-guide/signing-up-for-quest-on-demand/signing-up-and-adding-users-to-your-organization)
- Join an existing On Demand organization (https://support.quest.com/technical-documents/on-demand-global-settings/current/user-guide)

You must accept the Software Transaction Agreement before using this product.

2

Before you Start

To access your Azure Active Directory or Office 365 tenant via On Demand Migration, the migrator account needs to have the following:

- Microsoft 365 cloud-only identity as per the Microsoft documentation.
- Exchange Online subscription

In this chapter:

- Organizations and Regions
- Required consents and permissions
- Assigning Roles with PowerShell
- Adding a Tenant.
- Upgrading throttling policies to minimize the impact to the migration process
- Working with On Demand Migration
- About Update Agents

Organizations and Regions

When you sign up for the On Demand service for the first time, you create an organization and you become the On Demand organization administrator. You can add additional organization administrators.

For more information about managing your organization see Organizations and regions section in On Demand Global Settings User Guide.

Required Consents and Permissions

Whenever you add tenants to your organization, the Azure AD administrator account grants the **Base** consent to the Quest OnDemand application. To use On Demand Migration, the Azure AD administrator (the user principal) must grant additional consents and permissions to the On Demand Migration service applications (the service principals).

This section lists the minimum consents and permissions required by the Azure AD administrator account for managing tenants and Office 365 objects and the On Demand Migration service applications for migrating Office 365 objects.

> **IMPORTANT:** The source and the target Azure AD administrator accounts should have a mailbox with a valid Microsoft Exchange Online license.

For the Azure AD Administrator account

Task	Minimum Permissions
Add and configure tenants, and grant consent	**Global Administrator** role for both source and target Azure AD administrator accounts. See Adding a Tenant for details.
Provision OneDrive	**SharePoint Administrator** role for provisioning OneDrive on the target tenant.
Migrate Guest Users	**Guest Inviter** role for *Target* Azure AD administrator accounts.
Process Resources	**Guest Inviter** role for *Source* Azure AD administrator accounts.
Migrate Teams and Microsoft 365 Groups	**Global Administrator** or **Teams Administrator** role. In addition to these roles, the Azure AD Administrator account that grants the consents to the Migration -Teams application also requires the following: • an active Microsoft 365 license • Microsoft Teams app enabled within the Microsoft 365 license • must remain active for the duration of the migration
Reconfigure application with the Desktop Update Agent (DUA)	**Application impersonation** role for *Source* Azure AD administrator accounts. The permission is used to insert a hidden message in the user mailboxes via EWS. This hidden message will be used by the DUA during the application reconfiguration process.

For the Migration - Basic application

Task	Minimum Consents and Permissions
All tasks including discover and migrate accounts	**Migration - Basic** consent from both source and target Azure AD administrator accounts.
Migrate hybrid accounts	**Global Administrator** role for both source and target Azure AD administrator accounts.
Guest User	**Guest Inviter** role for both source and target Azure AD administrator accounts.

For Migration - Mailbox Migration application

Task	Minimum Consents and Permissions
All tasks	**Migration - Basic** consent from both source and target Azure AD administrator accounts.
Migrate mailboxes	**Mailbox Migration** consent from both source and target Azure AD administrator accounts.
Migrate Public Folders	**Migration - Mailbox Migration** consent and **Global Administrator** role for source and target Azure AD administrator accounts. The **Owner** permission for the root Public Folder of the target tenant must also be granted to the target Azure AD administrator account.

For the Migration - SharePoint application

Task	Minimum Consents and Permissions
All tasks	**Migration - Basic** consent from both source and target Azure AD administrator accounts.
Migrate OneDrive	**Migration - SharePoint** consent from both source and target Azure AD administrator accounts.
Migrate SharePoint	**Migration - SharePoint** consent from source and target Azure AD administrator accounts. The target tenant should already have the fully configured SharePoint with the active license plan. See Prerequisites for details.

For the Migration - Teams application

Task	Minimum Consents and Permissions
All tasks	**Migration - Basic** consent from both source and target Azure AD administrator accounts.
Migrate Microsoft Teams and Microsoft 365 Groups with Teams functionality	**Mailbox Migration**, **Migration - SharePoint** and **Migration - Teams** consents, and **Global Administrator** or **Teams Administrator** roles for both source and target Azure AD administrator accounts.

Assigning Roles with PowerShell

To assign the required roles to an Azure AD administrator account you can use the PowerShell script as described below. Run this script as a Global Administrator for the tenant, for which you want to grant the necessary permissions.

This command assigns all minimum required permissions to the Azure AD administrator account **odmServiceAccount@contoso.onmicrosoft.com**. You can specify only the minimum roles required for the processes that you want to perform.

```
$serviceAccountUpn = "odmServiceAccount@contoso.onmicrosoft.com"
function AssignAzureAdRole($RoleName, $UserPrincipalName)
{
      $role = Get-AzureADDirectoryRole | Where {$_.displayName -eq $RoleName}
      if (!$role)
      {
            $RoleTemplate = Get-AzureADDirectoryRoleTemplate | Where-Object
{$_.DisplayName -eq $RoleName}
            $role = Enable-AzureADDirectoryRole -RoleTemplateId $RoleTemplate.ObjectId
      }

      if ((Get-AzureADDirectoryRoleMember -ObjectId $role.ObjectId).UserPrincipalName -
notcontains $UserPrincipalName)
      {
            Add-AzureADDirectoryRoleMember -ObjectId $role.ObjectId -RefObjectId (Get-
AzureADUser -Filter "userPrincipalName eq '$UserPrincipalName'").ObjectID
      }
```

```
}

function AssignExchangeRoles($RoleName, $UserPrincipalName, $Roles)
{
     $group = Get-RoleGroup -Filter "Name -eq '$RoleName'"
     if (!$group)
     {
          $group = New-RoleGroup $RoleName
     }
     $group | Update-RoleGroupMember -Members $UserPrincipalName -Confirm:$false

     $Roles | ?{ $group.Roles -notcontains $_ } | %{
          New-ManagementRoleAssignment -SecurityGroup $group.Id -Role $_
     }
}

Import-Module AzureAD
Import-Module ExchangeOnlineManagement

# Assign AzureAD roles
Connect-AzureAD
AssignAzureAdRole 'Guest Inviter' $serviceAccountUpn
AssignAzureAdRole 'SharePoint Administrator' $serviceAccountUpn

# Assign Exchange Online roles
Connect-ExchangeOnline
AssignExchangeRoles 'QuestODMServiceAccount' $serviceAccountUpn (
     'ApplicationImpersonation',
     'Mail Recipients',
     'Federated Sharing',
     'Security Group Creation and Membership',
     'Mail Recipient Creation',
     'Transport Rules',
     'Remote and Accepted Domains',
     'Distribution Groups'
)
```

Adding a Tenant

Each On Demand migration project needs a source and target tenant. For steps to add tenants to the On Demand organization, see the Tenant Management section in the On Demand Global Settings User Guide.

For users in the United States deployment region

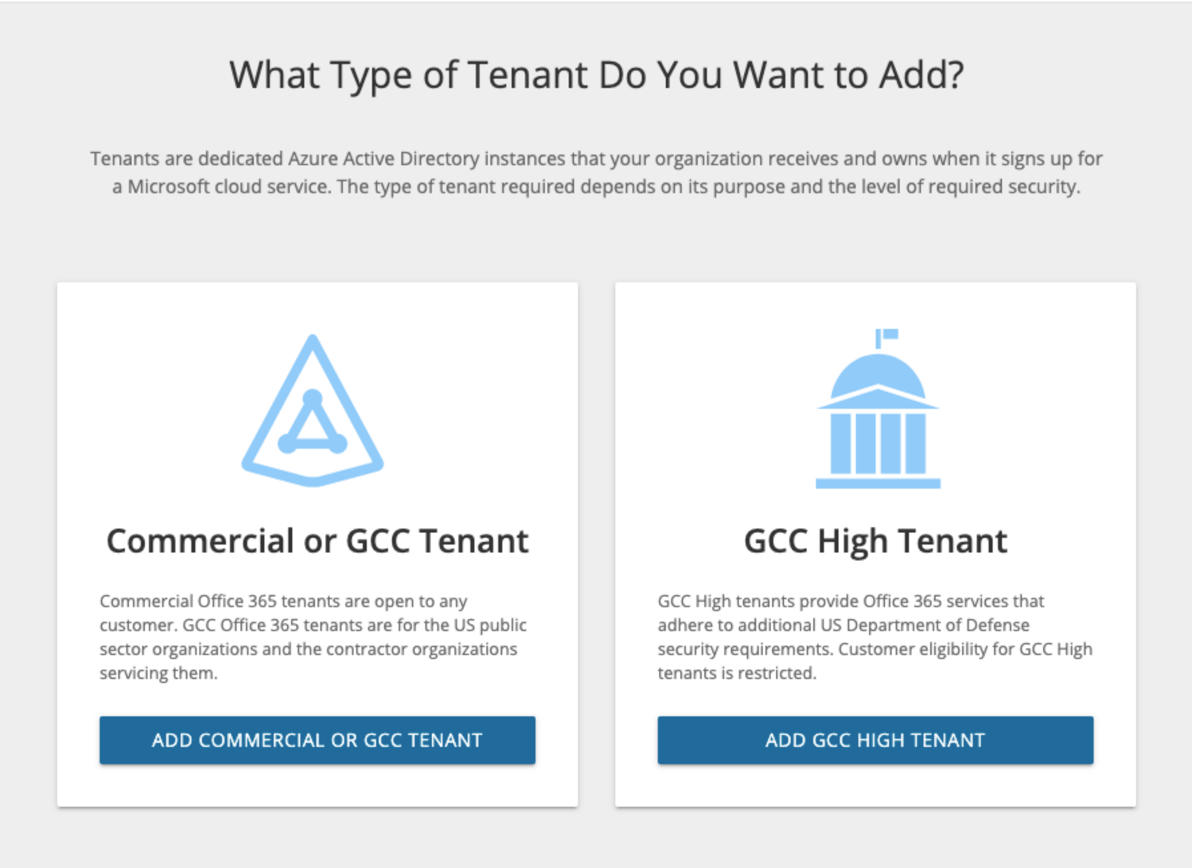
On Demand Migration offers two options depending on the type of Microsoft Office 365 tenant that you want to add:

- **Commercial or GCC Tenant** - choose this option if you want to add either a Microsoft Office 365 commercial tenant hosted on the Azure public cloud or a Microsoft Office 365 GCC (Government Community Cloud) tenant with moderate cyber-security and compliance standards hosted on the Azure

Government cloud.

- **GCC High Tenant** - choose this option if you want to add a Microsoft Office 365 GCC High tenant with advanced cyber-security and compliance standards like NIST 800-171, FedRAMP High and ITAR hosted on the Azure Government cloud.

NOTE: When you create a migration project, a GCC or GCC High tenant can be used as the target tenant only.



Upgrading Throttling Policies

Exchange Web Services (EWS) are throttled by Microsoft whenever large quantities of data flows through the EWS platform. The On Demand Migration service throughput can be improved by upgrading the following throttling policy parameter setting to **Unlimited**:

- **EwsMaxBurst** - Defines the amount of time that an EWS user can consume an elevated amount of resources before being throttled. This is measured in milliseconds. This value is set separately for each component.
- **EwsRechargeRate** - Defines the rate at which an EWS user's budget is recharged (budget grows by) during the budget time.

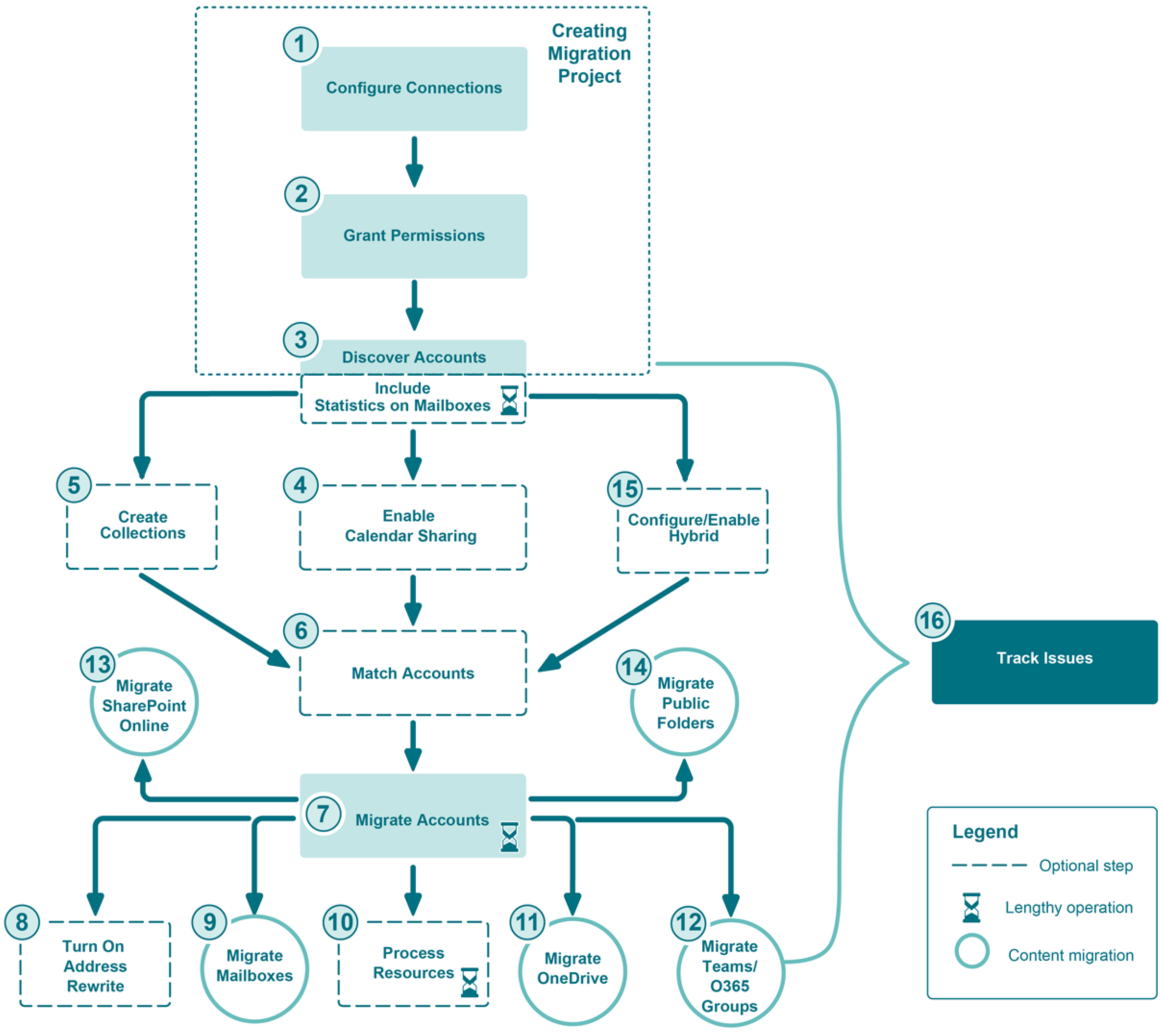
- **EwsCutoffBalance** - Defines the resource consumption limits for EWS user before that user is completely blocked from performing operations on a specific component.

Tenant administrators can upgrade the throttling policies by making a service request with Microsoft.

Working with On Demand Migration

The On Demand Migration provides a high-level, intuitive project management for migrating accounts and content from one tenant to another. Now you can create a migration project that provides a full range of migration features, and track accounts and content migration in one comprehensive migration project dashboard. Also now you can use new My Projects list view for the summarized list of all your migration projects.

Migration workflow



#	Step
1	Create a migration project. Step 1: Configure connections
2	Create a migration project. Step 2: Grant permissions (see Required Consents and Permissions)
3	Create a migration project. Step 3: Finalize migration project creation to perform pre-migration assessment and discovery. The discovery task can now be started automatically.
4	Share free/busy information from users' calendars
5	Organize accounts into collections
6	Match source accounts with the existing target accounts
7	Migrate accounts
8	Start Address Rewriting for Domain Coexistence
9	Migrate mail
10	Grant target users access to source tenant's resources (resource processing)
11	Migrate OneDrive for Business stores
12	Migrate Microsoft Teams and Microsoft 365 Groups with Teams functionality
13	Migrate SharePoint
14	Migrate Public Folders
15	Configure hybrid connections and enable Hybrid (see)
16	Monitor the progress and track issues

Test and Pilot Migrations

Any full scale migration should be preceded by test and pilot migrations, to confirm that your migration processes and procedures will accommodate the organization requirements.

- A test migration uses real users and real data in a segregated test environment, or dummy users and dummy data in your live production environment.
- A pilot migration uses a small portion of real users and real data in the live production environment.

In either case - a test or pilot migration - the data to be migrated should be a representative sample of the production data, and the test or pilot migration should be run with the Quest applications set for the same configuration and process options that you intend to use for the production migration. it is recommended to select test or pilot users whose usage and data types make them representative of the total user population. Then create and run matching / migration tasks for those accounts, including all range of tasks you are planning to perform. When the tasks are completed, review errors and warnings, if any. See Event Management section for more information.

Quest recommends that you use both test and pilot migrations:

Perform one or more test migrations in a separate test environment, migrating test copies of real users and their real data. The separate test environment ensures that no test process will affect the data or configurations of your production environment. If a test exposes any problems under migration, you can make amendments and then repeat the test by simply dumping the test environment and recreating it from scratch.

When you are confident that your test migrations have sufficiently refined your planned migration, perform a pilot migration for 20 or 30 users to verify if your planned migration is satisfactory for your "real world."

Project Management

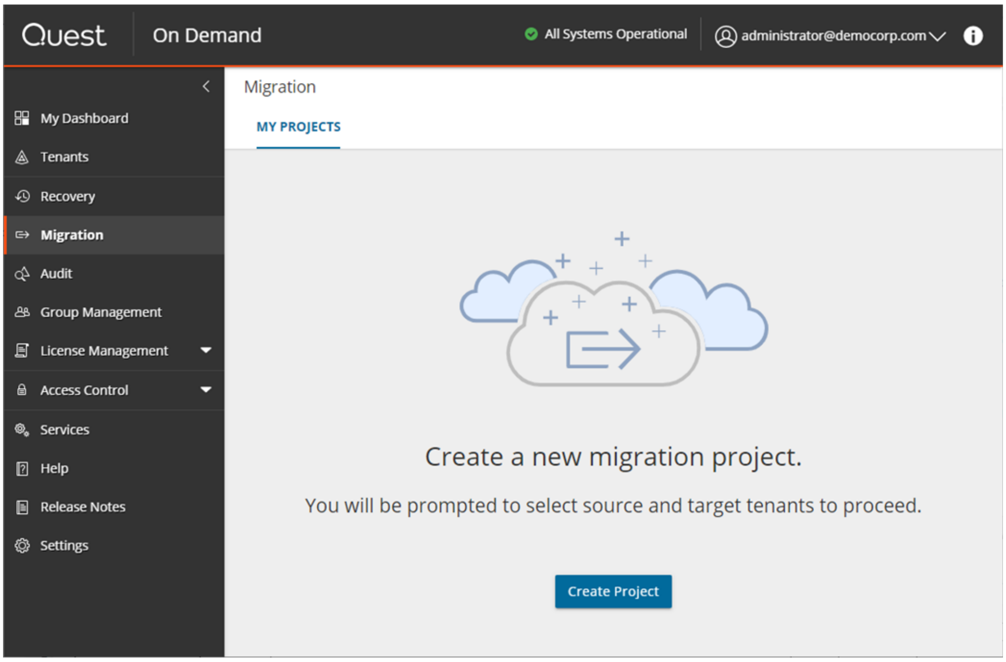
A migration project contains the full set of migration features and provides a summary of all the migration activities in the project dashboard. You can work with a single migration project for small migrations or you can set up multiple migration projects to split larger migration plans into manageable projects.

In this topic:

- Creating a new migration project
- Renaming a migration project
- Deleting a migration project

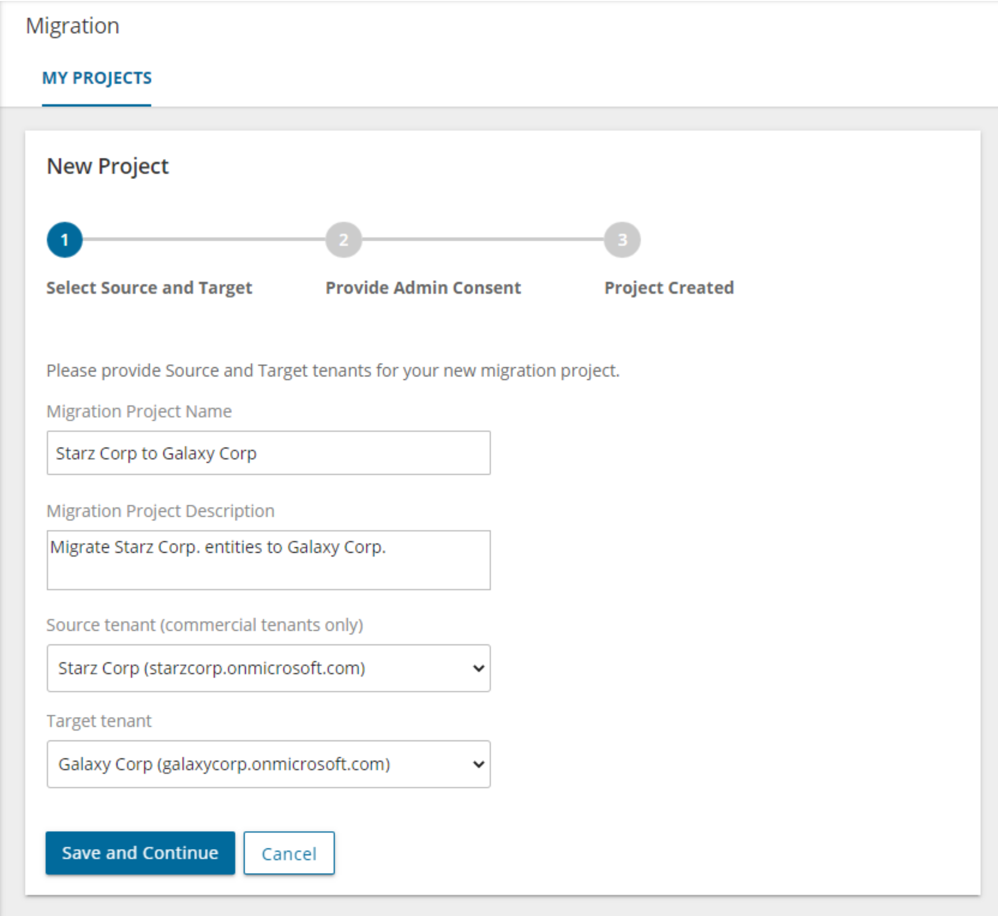
To create a migration project:

1. Sign in to Quest On Demand.
2. From the navigation pane, click **Migration** to open the *My Projects* view.



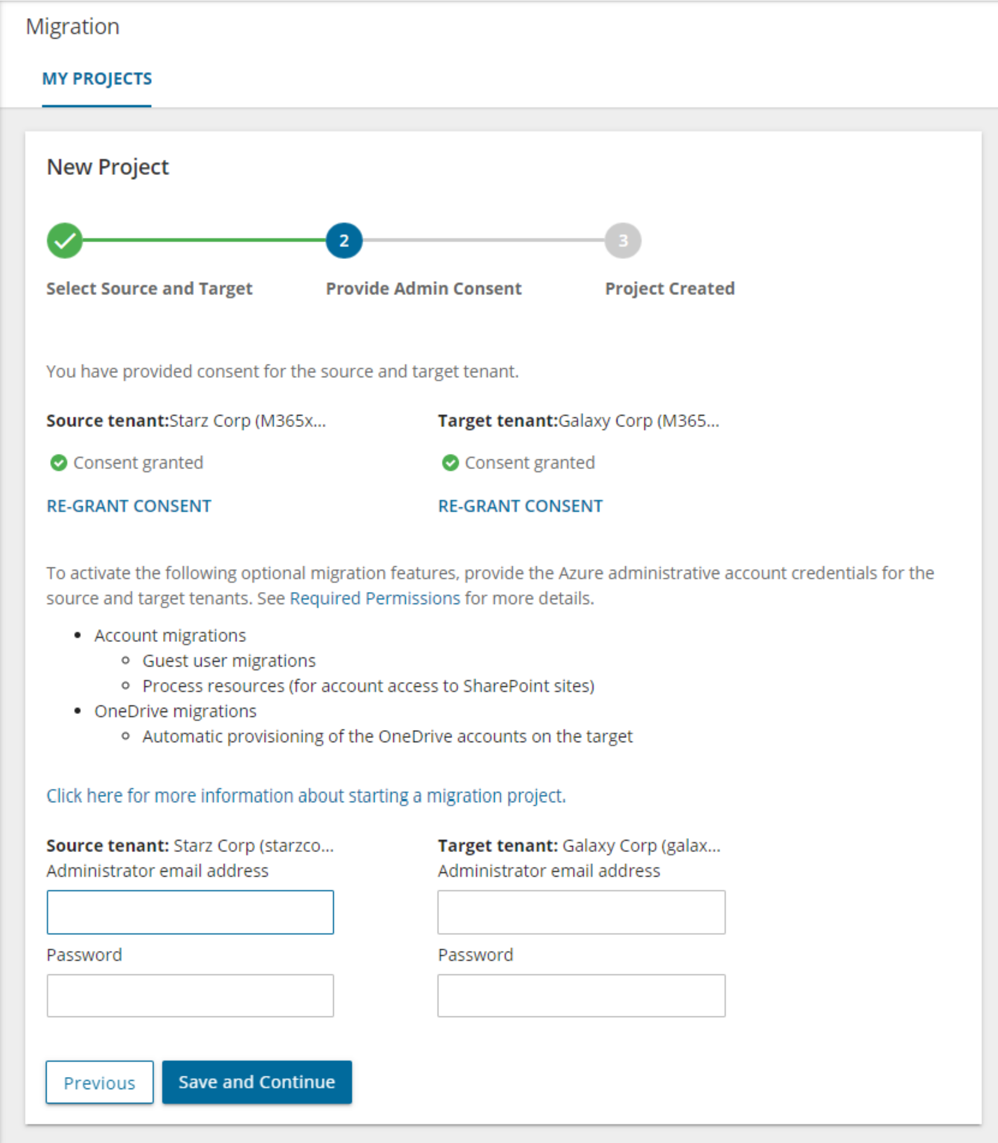
3. Click **Create Project** to start the *New Project* wizard. If you have already created one or more projects, scroll down and click **New Project**.

4. Step 1: **Select Source and Target**



   a. **Migration Project Name** - Specify a meaningful name for the project. The default name is `New Migration Project`.
   b. **Migration Project Description** - Enter a description about the project.
   c. **Source Tenant** - Select a source tenant from the drop down list.
   d. **Target Tenant** - Select a target tenant from the drop down list.
   e. Click **Save and Continue**.

5. Step 2: **Provide Admin Consent**



Most Office 365 objects can be migrated when the service principals (the On Demand Migration service applications) have been granted the consent. To use the service principal:

a. Click **Grant Consent** to grant the consents to the service principal if this is a new project and the consent has not been granted.

b. Click **Re-grant Consent** to refresh the consents granted to the service principals. It is recommended that you re-grant consent to ensure that the consent to the service principals are refreshed.

c. Click **Save and Continue**.

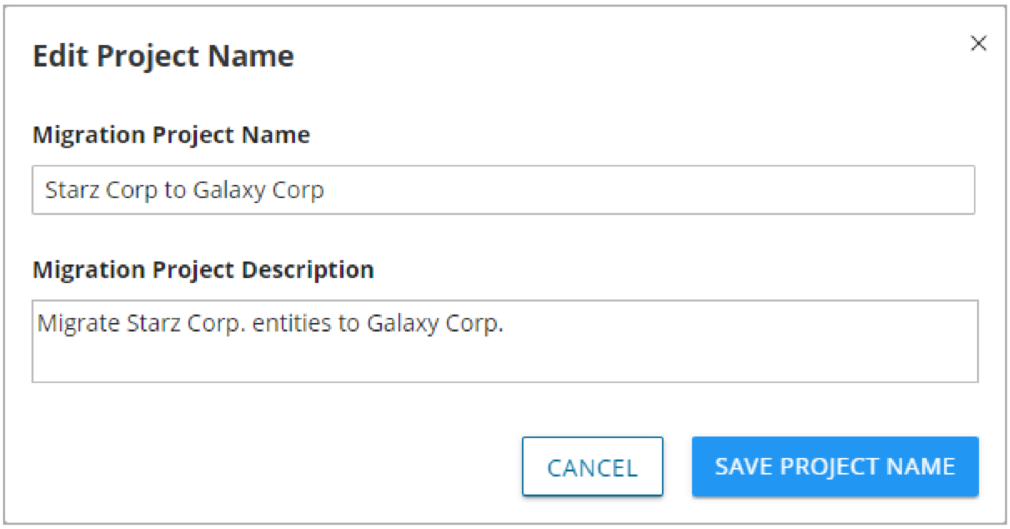
If you need to migrate Office 365 objects that require the user principal to have the **Global Administrator** or other specific roles you must provide additional authorization. To grant additional authorization to the user principal:

    a. Enter the email address of the source and target administrators.
    b. Enter the password of the source and target administrators.
    c. Click **Save and Continue**.

6. Step 3: **Project Created**
    a. Verify that permissions were granted
    b. **Open Project** - select this option to open the project dashboard.
    c. Click **Finish and Close**.

To rename a migration project:

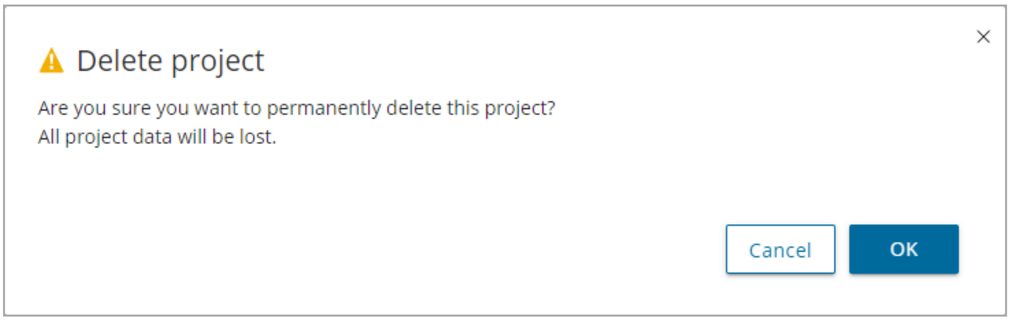
1. Sign in to Quest On Demand.
2. From the navigation pane, click **Migration** to open the *My Projects* view.
3. From the top right-hand corner of the project panel, click the **More Actions** icon (3 dots). Then click **Rename Project**.
4. Revise the name or description as needed.



5. Click **Save Project Name** to save the changes and close the dialog.

To delete an existing project:

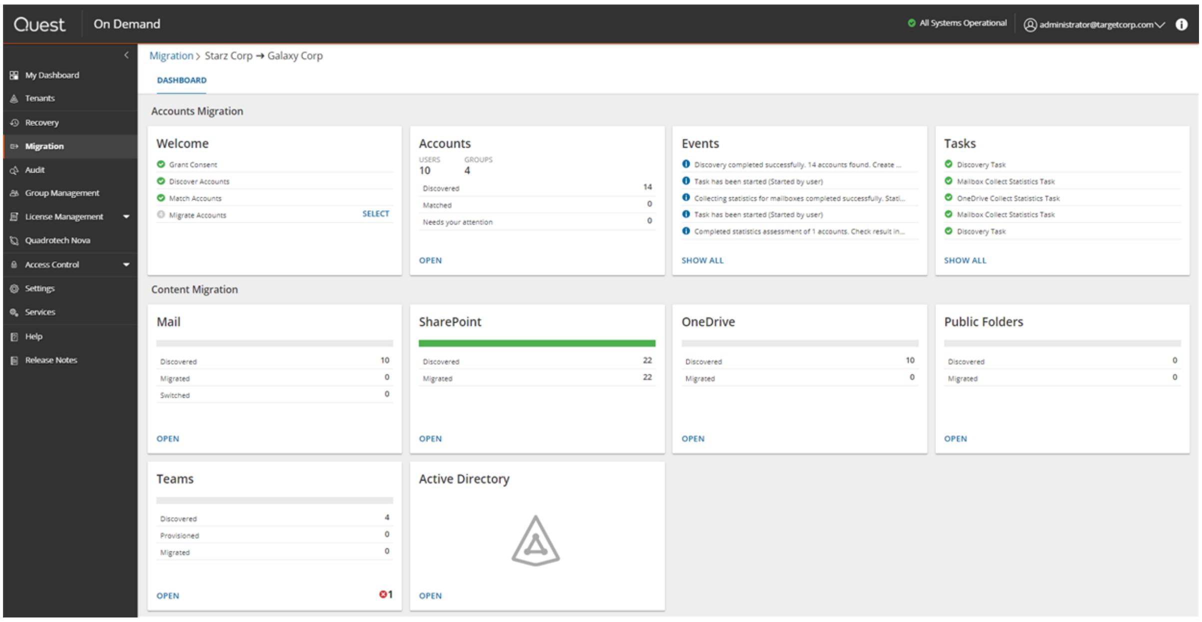
1. Sign in to Quest On Demand.
2. From the navigation pane, click **Migration** to open the *My Projects* view.
3. From the top right-hand corner of the project panel, click the **More Actions** icon (3 dots). Then click **Delete Project**.



4. Click **OK** to confirm the deletion.

Project Dashboard

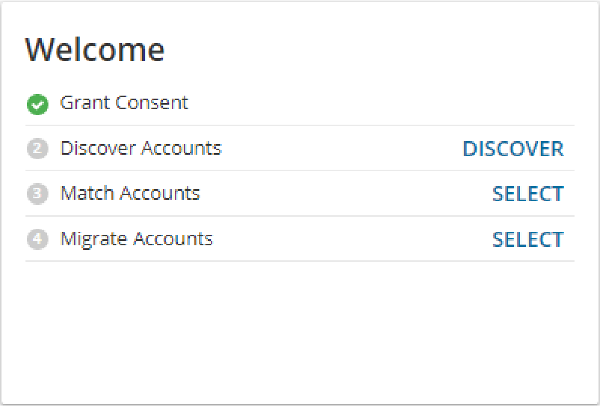
Information about the migration project is summarized on the project dashboard. The tiles that you can see and the features that you can access through the project dashboard depend on your subscription. For information about subscriptions, see On Demand Global Settings Current User Guide.



Each tile on this dashboard presents a summary of the migration activities and lets you navigate to the respective migration service dashboards or list views as described below:

Welcome

Quick start your migration activities from this tile. The following activities can be performed here:



Grant Consent - If you see a green icon, you have granted the necessary consents to the source and target tenants associated with this project. Otherwise the **Grant** link is displayed and you can click the link to complete the authorization process for the source or target tenants.

Discover Accounts - If you see a green icon, you have already discovered one or more accounts in the source tenant. Otherwise, click **Discover** to open the *Accounts List view* and start a discovery process.

Match Accounts - If you see a green icon, you have matched one or more accounts between the source and target tenants. Otherwise, click **Select** to open the *Accounts List view* and start a matching process. You must discover one or more accounts before you can start the matching process.

Migrate Accounts - If you see a green icon, you have migrated one or more accounts from the source to the target tenant. Otherwise, click **Select** to open the *Accounts List view* and start a migration process. You must match one or more accounts before you can start the migration process.

Accounts, Mail, OneDrive and Teams

These tiles presents information about the objects that were discovered or migrated in addition to other pertinent information. These objects are managed through the Account and User Data workspace and share a common dashboard. Click **Open** from the *Accounts*, *Mail*, *OneDrive*, and *Teams* tiles to access the common dashboard.

Public Folders

Displays information about the discovered and migrated public folders. Click **Open** to access the dashboard in the *Public folder* workspace.

SharePoint

This tile presents information about the discovered and migrated SharePoint objects. Click **Open** to access the dashboard in the *SharePoint* workspace.

Active Directory

Click **Open** to access the Active Directory workspace for Microsoft 365 domain move service, directory synchronization services for Microsoft Active Directory and Azure Active Directory, and other migration services for Microsoft Active Directory.

Tasks

Displays the five most recent tasks that were completed in the Accounts and User Data workspace. Click **Show All** to open the *Tasks List view* in the Accounts and User Data workspace.

Events

Displays the five most recent events that were completed in the Accounts and User Data workspace. Click **Show All** to open the *Events List view* in the Accounts and User Data workspace.

Task Management

From the **Tasks** list you can control the individual steps of the migration project:

- Track the task progress and view the results of finished tasks. Select a task to see a details pane in the right pane of the screen for the detailed information and statistics. Use search or filtering to quickly navigate through the list of tasks.
- Start, stop, and delete tasks.
- Edit tasks.

To optimize performance you can schedule start for all tasks as necessary. For details see Task Scheduling.

Task Scheduling

To optimize performance you can select schedule options for all tasks using **Schedule** page of task wizards. This is reasonable for the task that may take a considerable amount of time. The following options are available:

- **Run now**
  To create and start the task automatically when the wizard is finished.
- **Schedule**
  To create and start the task automatically as scheduled.
- **Run later**
  To create and start the task manually.

Task Editing

From the **Tasks** list you can edit previously created tasks to reuse them.
The following scenarios are possible:

1. Editing of finished task.
2. Editing of running task
3. Editing of not started task

Finished task editing

You can edit finished task in case it is finished successfully or failed to reuse it.
Please consider the following, depending on schedule option selected you can:

- Automatically restart changed task in case **Run Now** option is selected.
- Manually start changed task in case **Run Later** option is selected. All changes will be applied after the task is restarted.
- Schedule start for changed task in case **Schedule** option is selected. All changes will be applied after the task is restarted.

NOTE: You cannot undone this operation after the wizard is finished and reset the edited task to initial settings.

Running task editing

You can edit running task to reuse or restart it.
Please consider the following, depending on schedule option selected you can:

- Automatically restart changed task in case **Run Now** option is selected.
- Manually start changed task in case **Run Later** option is selected. All changes will be applied after the task is restarted.
- Schedule start for changed task in case **Schedule** option is selected. All changes will be applied after the task is restarted.

NOTE:

- Your changes cannot affect the task that is currently running.
- You cannot undone this operation after the wizard is finished and reset the edited task to initial settings.

Not started task editing

You can edit task in case it is not started to change your settings.
Please consider the following, depending on schedule option selected you can:

- Automatically start changed task in case **Run Now** option is selected.
- Manually start changed task in case **Run Later** option is selected.
- Schedule start for changed task in case **Schedule** option is selected.

NOTE: You cannot undone this operation after the wizard is finished and reset the edited task to initial settings.

Event Management

Events list contains all notifications and alerts related to the environment configuration and migration process. It allows you:

- View all events related to the migration process.
- If you are using new migration UI select an event to see details related to the event on the right pane.
- Hide certain alerts from the list by using **Acknowledge** option. This might be useful if you don’t want to be distracted by the accidental warning or “expected” error.

- Explore details about selected events. See the details pane on the right pane of the screen for more details and statistics for the selected event.
- Export selected events into comma-separated values (CSV) file for analytic or archival purposes.

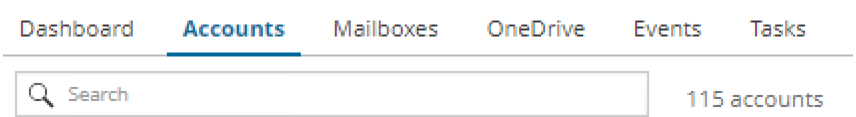
TIP: Use search or filtering to quickly navigate to the points of interest.

Please consider the following:

Depending on selected migration options, the content is transferred in separate batches that can be submitted for processing at the same time. It can take a while before processing of submitted batches will be completed. To help tracking the migration, statuses for batches that are processed will be reported approximately every 5 minutes.

Searching

The lists of accounts, mailboxes, tasks or events could be large and hard to manage. Use the Search box above this list to look for items that match your custom criteria.



You can use words, phrases, and special queries in your search. The search is performed across all fields. You can add search criteria to the search using facet filters on the left pane. Any filter can be cleared from the search by clicking button. Press **Enter** to get the search results.

TIP: Add * to the end of the search query to match all items starting with the search term. Otherwise, you will only get the exact matches. For example, **john*** returns John Doe, *John*son Smith, and *john*.doe. Search expressions are case-insensitive.

Advanced Search

You can refine your results by using the advanced search operators. See Lucene Tutorial for the full information on search syntax.

To search for	Operators	Examples	Result
Part of a word	*	*serv*	Matches items containing "serv".
Exclude specified content	**-**, **NOT** (case-sensitive)	-mail* (NOT mail*)	Excludes items that contain the word starting with “mail”.
Include specified content	**+**	+mail*	Matches items containing “mail” along with the basic search query.
Multiple keywords	Space, **OR** (case-sensitive), **AND** (case-sensitive)	mail user, mail OR user, mail AND user	Matches items that contain either “mail” or “user” in case of OR. Matches items that contain both “mail” and “user”. in case of AND. This is the default search behavior for phrases.

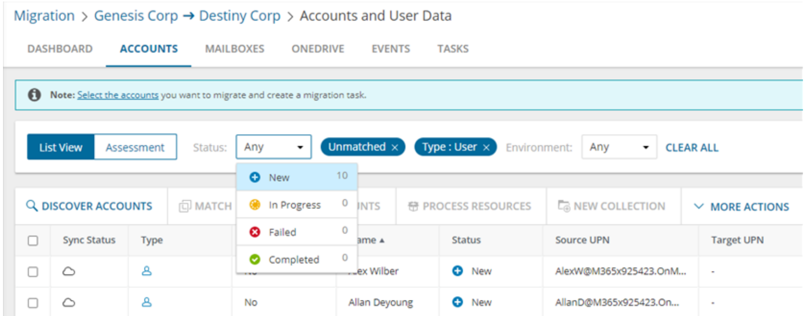
To search for	Operators	Examples	Result
Exact phrase	Quotation marks	"item hard deleted"	Matches items that contain the exact phrase "item hard deleted".

Search by Date Range

You can select period or use **Custom range** link to specify desired data range for events.

Filtering

You can quickly filter lists based on the predefined criteria. The steps to filter a list is the same across all lists.



To apply a filter

Click one or more filters and select a value from the drop down list.

Filters are applied immediately when selected. Each predefined filter also displays the count of items for each value available in the drop down list. These values take into consideration any other filter that is already applied. For example, in the image above, there are 10 accounts in the Account list that have Status = New because the list has already been filtered for *Unmatched* accounts of type *User*.

To clear a filter

Click the **X** icon in the filter box to clear a single filter

-or-

Click **Clear All** to clear all filters.

The filters may be automatically applied, when you navigate across the interface. For example, navigate from assessment reports, view details on the specific task, or click links in notifications.

3

Account Migration

In this chapter:

- Accounts and User Data Workspace
- What We Migrate
- Preparation
  - Configuring Connections
  - Calendar Sharing
  - Discovering Accounts
  - Exporting Accounts
  - Managing Accounts with Collections
  - Assessment
- Migration
  - Matching Accounts
  - Migrating Accounts
- Post-migration
  - Domain Coexistence
  - Resource Processing

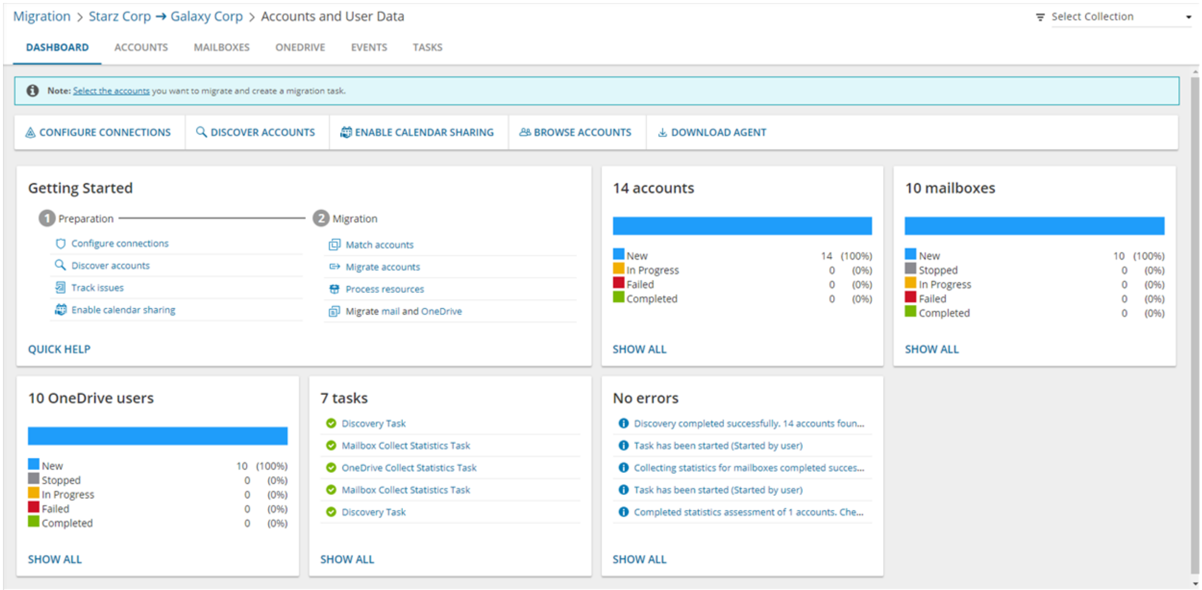
Accounts and User Data Workspace

The Account and User Data migration workspace consists of the following views:

- Dashboard
- Accounts
- Mailboxes
- OneDrive
- Tasks
- Events

The Dashboard and the Accounts view are described in this topic.

Dashboard view



The dashboard in the Accounts and User Data workspace is common for the Accounts, Mailbox and OneDrive migration services. The components of the dashboard are as described below:

Notification panel - presents relevant information and shortcuts to migration activities.

Dashboard Menu - contains the following links to common activities in the migration process.

- **Configure connections** - You can configure granular permissions for the source and target tenants in addition to advanced configurations such as concurrent PowerShell connections and custom EWS URL specification. For more information see .Configuring Connections
- **Discover accounts** - Starts the New Account Discovery Task wizard to collect information about accounts in the source tenant. For more information see Discovering Accounts.
- **Enable calendar sharing** - Starts the New Calendar Sharing Task wizard to allow users to retrieve calendar availability information after migration. For more information see Calendar Sharing.
- **Browse accounts** - Opens the Accounts list view where you can search and filter for accounts, and manage all the account migration activities. For more information see
- **Download agent** - Allows you to download a lightweight user desktop application (update agent) for users workstations that is needed to complete a migration project.

Getting Started - Presents quick start links to the various actions for preparing and migrating accounts.

Accounts - Presents a summary of the accounts in various migration states. Click **Show All** to open the *Account List view* to inspect the accounts.

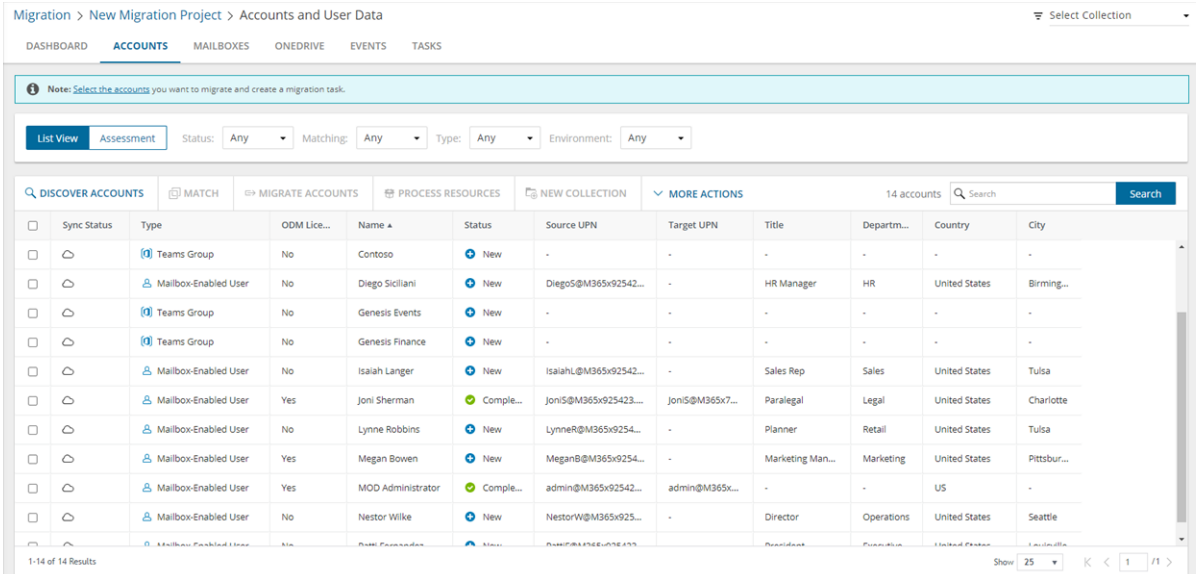
Mailboxes - Presents a summary of the mailboxes in various migration states. Click **Show All** to open the *Mailboxes List view* to inspect the mailboxes.

OneDrive - Presents a summary of users with OneDrive in various migration states. Click **Show All** to open the *OneDrive List view* to inspect the OneDrive information.

Tasks - Displays the five most recent tasks that were completed in the Accounts and User Data workspace. The title displays the total number of tasks. Click **Show All** to open the *Tasks List view*.

Events - Displays the five most recent events that were completed in the Accounts and User Data workspace. The title displays the total number of events. Click **Show All** to open the *Events List view* in the Accounts and User Data workspace.

Accounts view



The Accounts view consists of the following parts:

Notification panel - presents relevant information and shortcuts to migration activities.

Filter panel - consists of predefined filters for the Account List View and tabs to switch between the Account List View and the Assessment view. SeeFiltering for more information about working with filters. The predefined filters are:

- **Status** - corresponds to the **Status** column in the Account list. Valid values are *Any*, *New*, *In Progress*, *Failed* and *Completed*.
- **Matching** - determines whether or the source account is matched with a target account. Valid values are *Any*, *Matched* and *Not matched*.
- **Type** - corresponds to the **Type** column in the account list and determines the account type as defined in Active Directory. See the column definition below for valid values.
- **Environment** - the location of the Active Directory with which the account is synchronized. Valid values are *Synced with Active Directory* (synchronized with on-premise Active Directory) and In Cloud (synchronized with Azure Active Directory). This filter corresponds to the **Sync Status** column in the Account list.

Accounts Menu - contains links to account migration activities and the search box. Each activity is explained in greater detail in subsequent topics. See Searching for more information about working with the search box.

Accounts list - displays information about discovered accounts in the source tenant and the migration status of each account. The columns are as described below:

> **NOTE:** If you don't see the Sync Status or object description in the Type column, rerun the account discovery task as indicated in the *Notification panel*.

- **Sync Status** - indicates whether the account is synchronized with the on-premise Active Directory or Azure Active Directory. The tool tip displays the status value.
- **Type** - account type defined in Microsoft Active Directory. The account type can be one of the following:
  - Any
  - *User accounts* like Guest, Mailbox-enabled, Mail-enabled and Non-mail-enabled.

    - *Resource mailboxes* like Equipment, Room, Scheduled and Shared.
    - *Groups* like Distribution, Mail-enabled-security, Microsoft 365 (not associated with teams), Security and Teams.
- **ODM Licensed** - indicates whether or not an On Demand Migration license has been consumed when the account is matched or migrated. Licenses are not consumed for scheduled or shared mailboxes.
- **Name** - name of the account
- **Status** - status of the account in the migration process. Valid values are New, In Progress, Failed and Completed.
- **Source UPN** - UserPrincipalName (UPN) of the source account.
- **Target UPN** - UserPrincipalName (UPN) of the target account.
- **Title** - Job title of the user account. Does not apply to group accounts.
- **Department** - department of the user account. Does not apply to group accounts.
- **Country** - country of the user account. Does not apply to group accounts.
- **City** - city of the user account. Does not apply to group accounts.

Assessment - Contains summary reports about the discovered data to analyze your domain structure and track potential problems, misconfiguration, and risks that might adversely affect the migration. For more information see Assessment.

What We Migrate

The On Demand Migration service for Accounts migrates discovered user accounts and the following types of discovered groups:

- **Microsoft 365 Groups**
    - ownership (for accounts that have a pair on the target tenant)
    - membership (for accounts that have a pair on the target tenant)
    - email address for migrated Microsoft 365 Groups will be created in default target domain. See Microsoft Teams Migration for details on how to migrate Microsoft 365 Groups associated with Teams.
- **Security groups**
    - ownership (for accounts that have a pair on the target tenant)
    - membership (for accounts that have a pair on the target tenant)
- **Mail-enabled security groups**
    - ownership (for accounts that have a pair on the target tenant)
    - membership (for accounts that have a pair on the target tenant)
    - visibility in GAL
- **Distribution groups**
    - ownership (for accounts that have a pair on the target tenant)
    - membership (for accounts that have a pair on the target tenant)

- SendAs and SendOnBehalf group delegates
- visibility in GAL

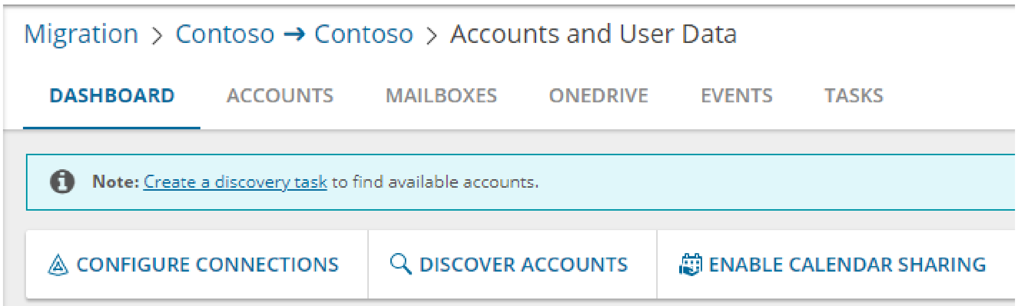
NOTE: The Azure AD administrator account of the target tenant will be added as an owner to all target mail-enabled security groups, distribution groups and Microsoft 365 Groups. Migration of security groups with dynamic membership is not supported.

Configuring Connections

You can re-configure connections from the account migration Dashboard as described below.

To configure connections for source and target tenants:

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migration** to open the *My Projects* list.
3. Create a new project or select an existing project.
4. Click **Accounts**. The *Dashboard* opens.



5. Click **Configure Connections** from the *Dashboard* ribbon.
6. In the *Configure Connections* dialog select the tenant and click **Edit**.
7. Provide or change the tenant administrator credentials.
8. Grant the necessary permissions to allow the product to access the tenant. You will be redirected to the Microsoft web site for granting administrator consent. See Required Consents and Permissionsfor more information.

   NOTE: Consent status may automatically expire after 90 days. If you are not finished with the migration, grant consent again.

9. Advanced Options
   a. **Concurrent PowerShell connections**

      You can increase **Concurrent PowerShell connections** settings to speed up the concurrent tasks completion or set the value in case of editing of the migration projects that have been created in previous versions of the On Demand Migration. The default Office 365 quota is 3 open connections per user.

CAUTION: Do not exceed the maximum number of concurrent PowerShell connections allowed for your organization to avoid throttling issues. To increase the maximum number of allowed concurrent connections open a support ticket with Microsoft.

b. **Specify custom EWS URL**

   Specify custom EWS endpoint for connecting to Exchange Web Services (EWS), if you do not want to use EWS endpoint located by the Auto-discover service automatically.

c. Click **Save** to commit your changes.

10. When both source and target connections are configured, click **Finish**.

Calendar Sharing

Create a relationship between the source and the target tenants to allow users to retrieve calendar availability information,

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migration** to open the *My Projects* list.
3. Create a new project or select an existing project.
4. Click **Accounts** from the project tiles. You can also click **Open Project** to open the project dashboard and then click **Open** from the Accounts tile. The *Accounts and User Data* dashboard opens.
5. Click **Enable Calendar Sharing** and verify the source and target domain names. Click **Next** to proceed.
6. Schedule when the task will be started. Click **Next** to view the task summary.
7. Name the task and check the selected options. Click **Finish** to save or start the task depending on schedule option selected.

Discovering Accounts

Discovering Accounts is a critical first step before a migration to enumerate, update and retrieve relevant information about accounts from the source tenant. The discovery task collects the necessary account data and statistics on connected mailboxes from your source tenant to avoid misconfiguration and prevent possible issues.

In this topic:

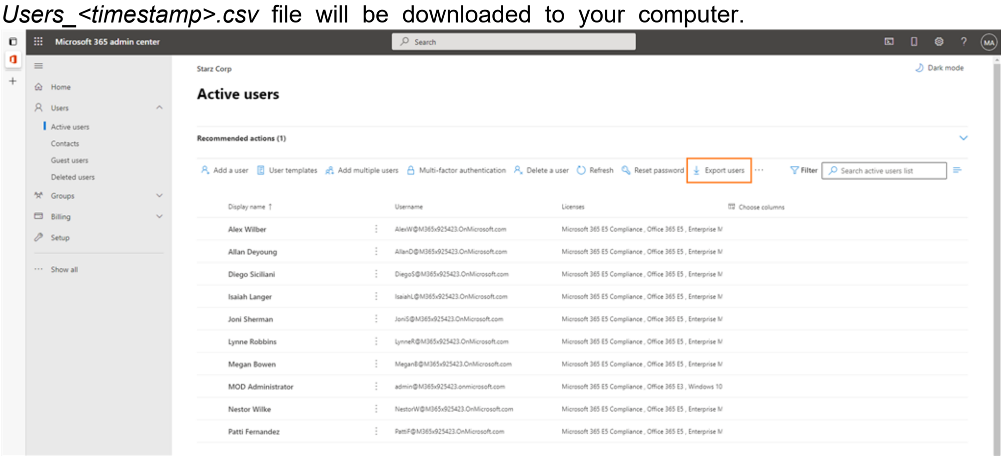
- Prepare a CSV file for discovering accounts
- Create and run a New Discovery Task
- Review the New Discovery Task
- Review the New Discovery Task events

Prepare a CSV file for discovering accounts

This step is required if you plan to discover accounts using a CSV file. When you have a large set of accounts but you want to discover a subset of those accounts, the CSV file lets specify the accounts that you want to discover and ignore the rest. You can then use this file in the New Discovery Task as described in this topic to discover the accounts from the source tenant.

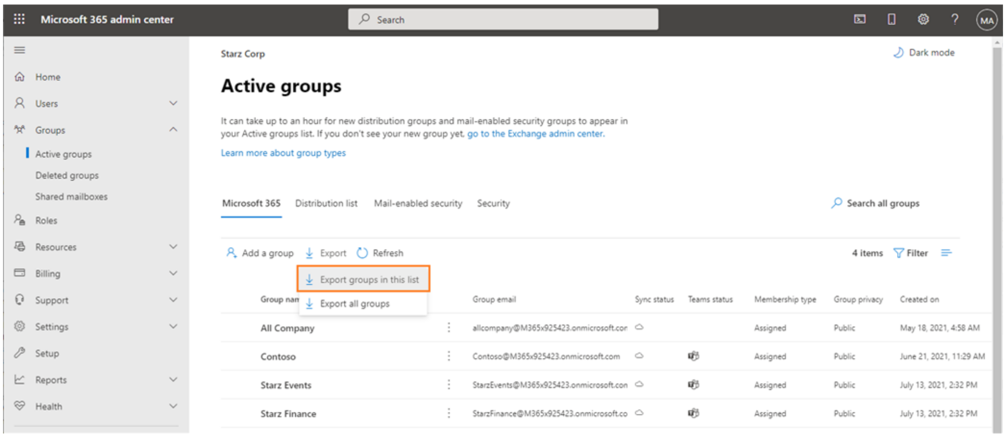
To prepare the CSV file:

1. Log in to the **Microsoft 365 admin center** (https://admin.microsoft.com) with the credentials of your source tenant administrator.
2. Export Users:
    a. From the navigation pane, click **Active users**.
    b. If needed, you can filter the set of users that you want to export. Then click **Export**. A *Users_<timestamp>.csv* file will be downloaded to your computer.



3. Export Groups:
    a. From the navigation pane, click **Active groups**.
    b. Select the **Microsoft 365** tab in the *Active Groups* page.
    c. If needed, you can filter the set of groups that you want to export. Click **Export** and then click **Export**

groups in this list. A *Groups.csv* file will be downloaded to your computer.



4. Create a new CSV file and add the users and groups you want to discover. You can follow any of the two formats shown below:

Format 1

	A	B
1	UserPrincipalName	Type
2	AdeleV@M365x347866.OnMicrosoft.com	user
3	AlexW@M365x347866.OnMicrosoft.com	user
4	BiancaP@M365x347866.OnMicrosoft.com	user
5	b6c1cb77-7632-42e1-91a2-2356e5696bf4	group
6	2ad5cef6-3e16-44fc-acd4-238fc786bfbb	group
7	009a2042-3841-418d-810f-ee229ed21431	group

UserPrincipalName - An Internet-style login name for a user account based on the Internet standard RFC 822. Do not use a mail nickname or proxy address. When you use **UserPrincipalName** (UPN) as the column header, you can combine UPN and group object GUIDs in the same list.

Type - Describes the type of account: **user** or **group**.

Format 2

	A	B
1	ObjectId	Type
2	1326a5cb-413f-4287-bd3a-6b27531aa1bc	user
3	be0c12cb-b2b6-4d31-8508-95a0527deee7	group
4	309b06b1-d8af-41bd-88e2-f842cdbeac09	group
5	1ef4a06e-e051-4f69-963d-8a5fa4ecf5b1	group
6	47ed2c7f-c4fd-4c86-8eb4-bfa9cb29a457	user

ObjectId - Globally unique identifier (GUID) of the user or group object. When you use **ObjectId** as the column header, you must specify object GUIDs only. You cannot specify UPNs.

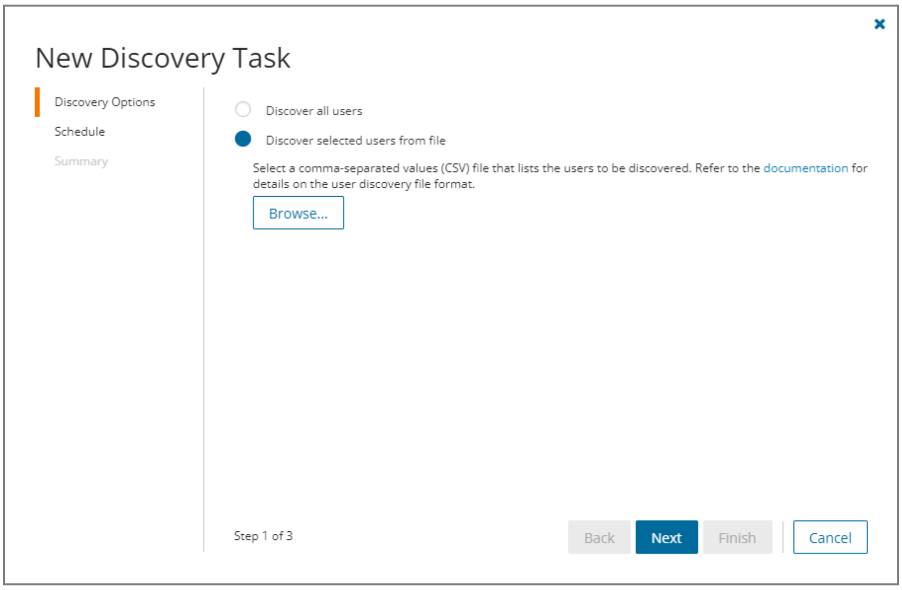
Type - Describes the type of account: **user** or **group**.

5. Save the CSV file that you created.

Create and run a new Discovery Task

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migration** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Do one of the following:
    - From the *Welcome* tile on the project dashboard click **Discover Accounts**. This action is not possible here if you have already run a discovery task.
    - From the *Accounts* tile on the project dashboard click **Open** and do one of the following:
        - Click **Discover accounts** on the *Accounts and User data* dashboard ribbon.
        - Click **Discover accounts** in the *Getting Started* tile on the dashboard.
        - Click **Quick Help** to open the *Getting Started* help page and then click **Create discovery task**.

    The *New Discovery Task wizard* starts.
5. Step 1: **Discovery Options**

    Choose the options as described below:

    a. **Discover all users** - select this option to collect information about all accounts and groups from the Active Directory.

    b. **Discover selected users from file** - select this option to collect information about specific accounts and groups from the Active Directory. If you select this option, click **Browse** to choose the comma-separated values (CSV) file that contains the lists of user accounts and group identifiers.
6. Step 2: **Schedule**

    a. Choose from one of three options to schedule the task. The scheduler will be activated only after you complete the task wizard.

- **Run now** - the task will run immediately.
- **Run later** - the task must be started manually.
- **Schedule** - specify a future date and time to run the task.

b. Click **Next**.

7. Step 3: **Summary**

a. Verify the task specifications as described below:

i. **Name** - name of the task. Specify an informative name for the task. It will greatly simplify the project management and event filtering in the future.

ii. **Source tenant** - name of the tenant where the account information will be collected.

iii. **Target tenant** - name of the target tenant in this project.

iv. **Scheduled start** - date and time when the task will start. **Now** indicates that the task will start immediately.

b. Click **Back** to revise or review a previous step.

c. Click **Finish** to complete the task wizard. The task will start as scheduled.

8. Click the task name on the widget to see the details or use **Show all** link.

NOTE: If there are user or group accounts from a previous discovery task that you don't want anymore, you can manually delete the accounts from the account list. If there are changes to an account from a previous discovery, the account will be updated if the account is rediscovered by the task.

When the discovery task is complete, a summary about the accounts discovered in the source tenant is available on the project dashboard.

Review the New Discovery Task

1. Select the **Tasks** tab.
2. Select the account discovery task that you want to review.
3. In the task details pane that opens, the information presented is as described below:

a. **Type** - Type of the task. The type is **Discover**.

b. **Created** - Date and time when the task was created.

c. **Modified** - Date and time when the task was last updated.

d. **Status** - State of the task.

e. **Last Operation** - The action that was most recently performed in this task.

f. **Schedule** - Date and time when the task started. Now indicates that the task started immediately after the task was created.

g. **Events (*number*)** - Number indicates the count of events that the task encountered. The values indicate the type of the events and the event count for each type.

Review the New Discovery Task Events

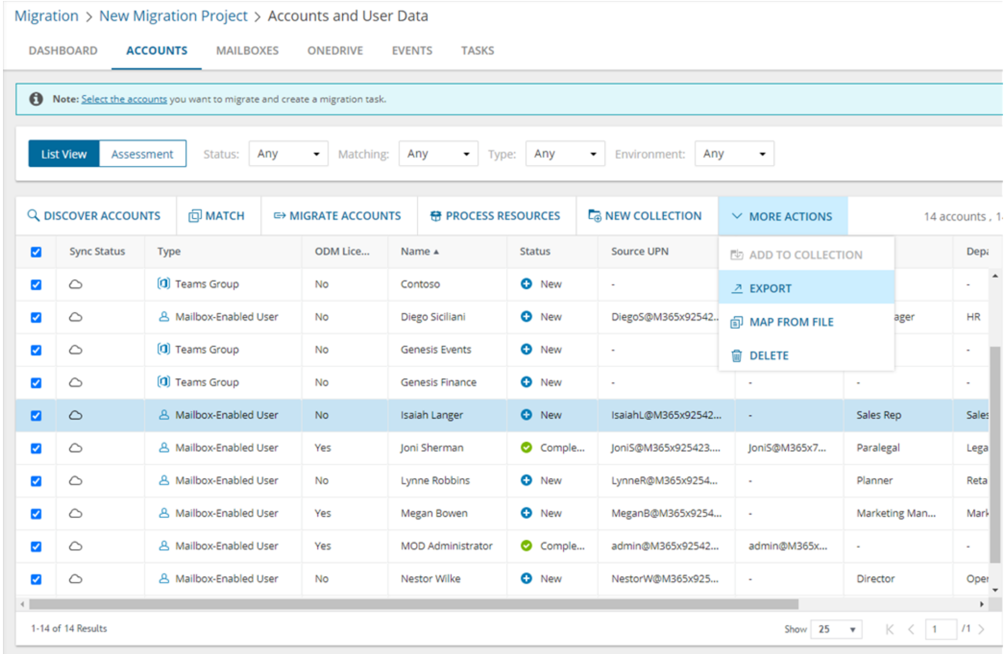
1. Select the **Tasks** tab.
2. Select the account discovery task for which you want to review the events.
3. In the task details pane that opens, click **Events (*number*)**. The *Events* tab opens with a filtered list of events for the selected task.
4. Select an event that you want to review. In the task details pane that opens, the information presented is as described below:
    a. **Object** - Not applicable for this event.
    b. **Task** - Name of the task.
    c. **Time** - Date and time when the event occurred.
    d. **Category** - Type of task. For account discovery tasks, the category is **Discover**.
    e. **Summary** - a descriptive statement about the event.

You are now ready for the Assessment.

Exporting Accounts

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migration** to open the *My Projects* list.
3. Create a new project or select an existing project.
4. Click **Accounts** from the project tiles. You can also click **Open Project** to open the project dashboard and then click **Open** from the Accounts tile. The *Accounts and User Data* dashboard opens.
5. Select the **Accounts** tab and select **List View** if not already selected.
6. Select the accounts to export.

7. Click **More Actions** and then click **Export**.



8. A ZIP file is downloaded to your computer. Unzip the file to access the exported list as a CSV file.

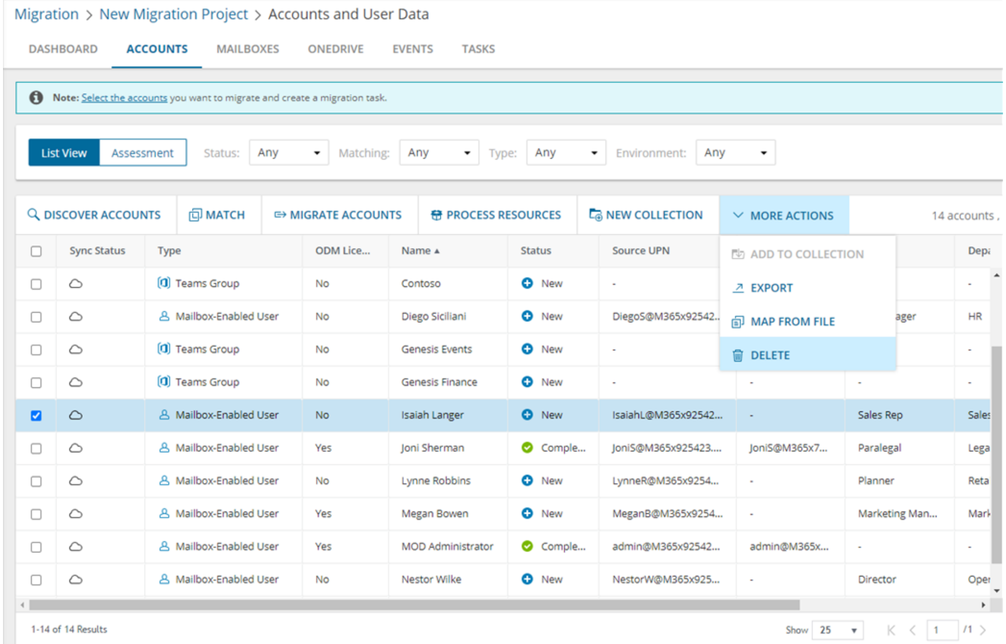
Removing accounts

To manage large lists of accounts in a project, you can remove one or more accounts from the accounts list that you don't need for migration processes. The accounts that are removed will remain in the source tenant and you must re-discover the accounts in the project when you need them for migration.

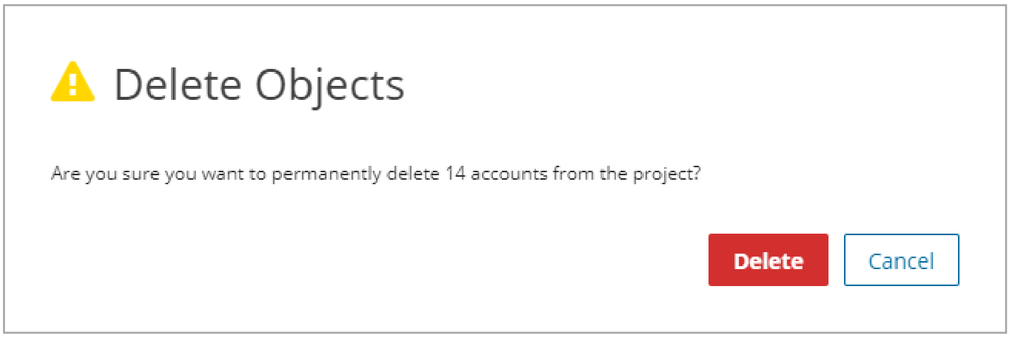
1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migration** to open the *My Projects* list.
3. Create a new project or select an existing project.
4. Click **Accounts** from the project tiles. You can also click **Open Project** to open the project dashboard and then click **Open** from the Accounts tile. The *Accounts and User Data* dashboard opens.
5. Select the **Accounts** tab and select **List View** if not already selected.
6. Select the accounts you want to clear.

   TIP: Use filters, search or collections to quickly navigate through the list of accounts.

7. Click **More Actions** and then click **Delete**.



8. The *Delete Objects* confirmation dialog opens.



9. Click **Delete** to remove the selected accounts from the list. If these accounts are listed in other projects, they will be displayed in those projects.

Managing Accounts with Collections

The migrated environment may be very big and complex. The accounts might belong to different offices and geographical locations. Some groups of employees, like top management, Finance or Legal divisions should be given special care when migrating. To make large environments more manageable, organize the accounts into collections.

Working with the Collection Dashboard

A collection acts like “migration project within migration project”. The Collection Dashboard shows the collection-specific summary, allows you to see accounts added to it, create tasks for them, and monitor the progress for the selected subset of accounts.

- To see accounts included in the collection, click **Browse Accounts** or open the **Accounts** tab. You will get the list of accounts that belong to the collection.
- To see the tasks for collection-specific accounts, use the corresponding widget on the collection dashboard or open **Tasks** tab.
- To see the events related to the collection, use the corresponding widget on the collection dashboard or open **Events** tab.
- To rename, or delete the collection, click the corresponding buttons in the toolbar.
- To populate the collection with discovered accounts using comma-separated CSV file click **Fill from File**.
- To return to the project dashboard, click the project name in the navigation bar.

Creating Collections

You can use collections to streamline the migration process. There are two approaches:

- You can select discovered accounts and create a new collection for them
- You can create a new empty collection and then populate it with discovered accounts using comma-separated CSV file.

To create a new collection based on selected accounts:

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migration** to open the *My Projects* list.
3. Create a new project or select an existing project.
4. Click **Accounts** from the project tiles. You can also click **Open Project** to open the project dashboard and then click **Open** from the Accounts tile. The *Accounts and User Data* dashboard opens.
5. Select the **Accounts** tab and select **List View** if not already selected.
6. Select the accounts you want to combine into a collection. You can use search for filtering the accounts or simply pick the individual accounts from the list.
7. Click **+New Collection**and enter a collection name. Click **Save** to add this collection to the project.

To create a new empty collection and then populate it with accounts:

1. From the *Accounts* tab, click **More Actions** and then click **Add To Collection**.
2. Enter a collection name and click **Save** to add this collection to the project.
3. Populate it using comma-separated values (CSV) file as described in the next section.

To populate a collection from a CSV file

NOTES:

- CSV file can contain one or more columns. There are no special requirements for header names.
- One of column must contain case insensitive user principal name data that will be used for matching.
- File names with non-ASCII characters are not supported.

1. Prepare a comma-separated values (CSV) file with discovered accounts that you want to add to the collection. the file can contain accounts that have not been discovered, but these accounts won't be added to the collection. One of the columns should contain the user principal names (UPNs). For example:

```
userPrincipalName, email, objectID
Example@testexample.onmicrosoft.com, Example@testdomain.com, d6801a8b-5cb1-48f4-9757-4465564c5c63
```

2. Select a collection you want to populate on Dashboard and click it to open the Collection Dashboard
3. Click **Fill from File** to populate the collection with discovered objects you specified in the file created on Step 1.
4. Click **Browse** to open the comma-separated CSV file created on Step 1.
5. Browse for file and click **Open**. Selected file name appears next to the **Browse** button.
6. Click **Populate** to populate the collection.

The collection is populated. You can see added objects on the Collection Dashboard.

NOTE: The objects that do not exist in the source or target tenants and the source accounts that are not enumerated during the Discovery are ignored without producing an event.

Assessment

On Demand Migration analyzes your domain structure and tracks potential problems, misconfiguration, and risks that might adversely affect the migration. Switch to **Assessment** view to see the summary reports about the discovered data.

The following reports are available for **Accounts**:

- To clean up
  - Disabled accounts
  - Users with non expiring passwords
- To adjust
  - Duplicate group names
  - Duplicate user names
  - Users without first name
  - Users without last name
- Account statistics (inventory data)
  - Number of users
  - Number of groups
- User data
  - External Accounts
  - Tenant members

Once you address the issues you are ready to start the migration.

Matching Accounts

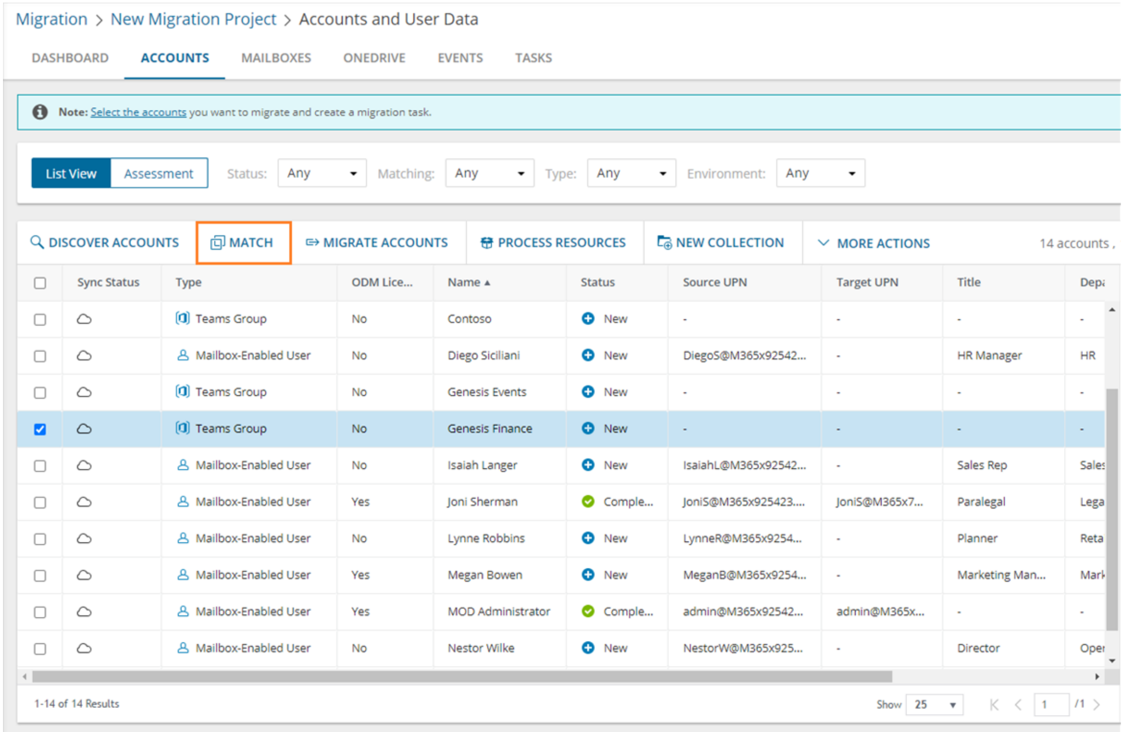
Your target tenant might already contain accounts created for the source tenant users before the migration. You can map them to the corresponding source accounts, so that no data is lost or duplicated.

In this topic:

- Automated account matching
  - Create and run a New Matching Task
- Manual account matching
  - Prepare a CSV file with mapped accounts
  - Create and run a New Mapping from File Task

Create and run a New Matching Task

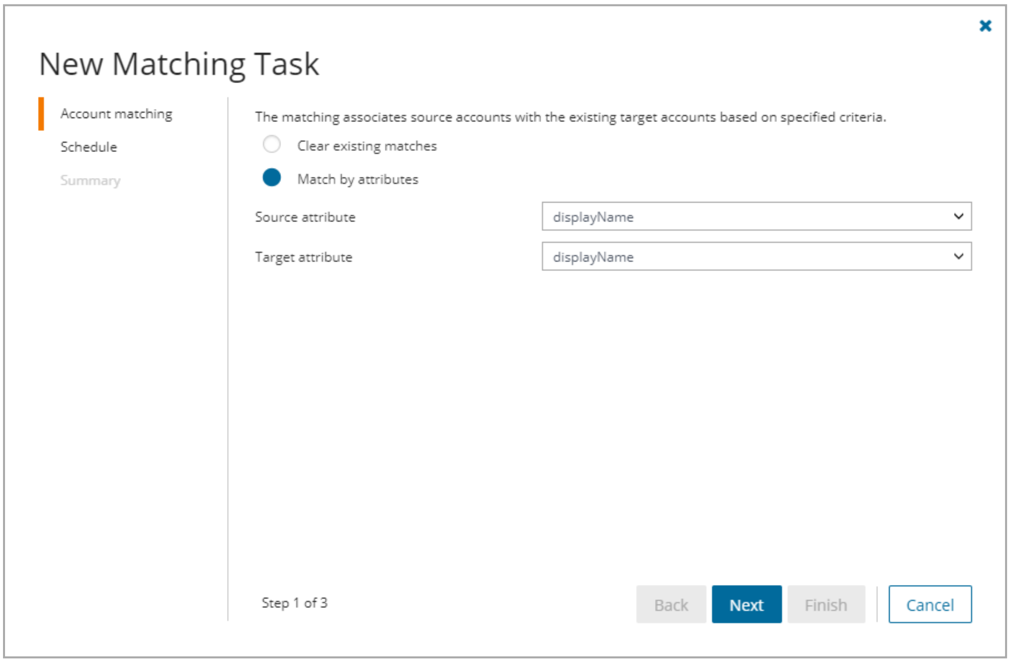
1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migration** to open the *My Projects* list.
3. Create a new project or select an existing project.
4. Click **Accounts** from the project tiles. You can also click **Open Project** to open the project dashboard and then click **Open** from the Accounts tile. The *Accounts and User Data* dashboard opens.
5. Click the **Match Accounts** link in the *Getting Started* tile
   - or -
   Select the **Accounts** tab and select **List View** if not already selected.



6. Select the accounts you want to match and then click **Match** from the *Accounts and User Data* dashboard.

   TIP: Use search or collections to quickly navigate through the list of accounts.

7. The *New Matching Task* wizard opens.
8. Step 1: **Account Matching**



a. Select **Match by attribute**.

b. Select the same matching attribute for the **Source attribute** and **Target attribute**. The matching attributes are as described below:

   - **displayName** - the attribute of the account as specified in the same active directory property.
   - **mail** - email address
   - **mailNickname** - email alias used in Exchange servers.
   - **ImmutableId** - A specific attribute for a Microsoft 365 account object that is synchronized from on prem Active Directory. When AAD Sync is used with the default settings on *Uniquely Identifying your users*, the Active Directory *objectGUID* is used as the **immutableId**.
   - **employeeId** - the identifier of an employee in active directory.

c. Click **Next**.

9. Step 2: **Schedule**

   a. Choose from one of three options to schedule the task. The scheduler will be activated only after you complete the task wizard.

      - **Run now** - the task will run immediately.
      - **Run later** - the task must be started manually.
      - **Schedule** - specify a future date and time to run the task.

   b. Click **Next**.

10. Step 3: **Summary**

   a. Verify the task specifications as described below:

      i. **Name** - name of the task. You can specify a custom name.

      ii. **Source tenant** - name of the tenant where the statistics will be collected.

      iii. **Target tenant** - name of the target tenant in this project.

      iv. **Scheduled start** - date and time when the task will start. Now indicates that the task will start immediately.

   b. Click **Back** to revise or review a previous step or click **Finish** to complete the task wizard and start the task as scheduled.

You can track its progress in the **Tasks**tab, view the summary on the Dashboard or monitor alerts and notifications in the **Events**tab. When accounts are matched successfully, the *Status* changes from New to Completed.

Prepare a CSV file with mapped accounts

This step is required if you plan to map specific accounts from the source to existing accounts in the tenant that do not have any matching attributes.The CSV file lets you specify the accounts that you want to map and ignore the rest. You can then use this file in the New Mapping from File Task as described in the next section, to map the accounts from the source to the target tenant.

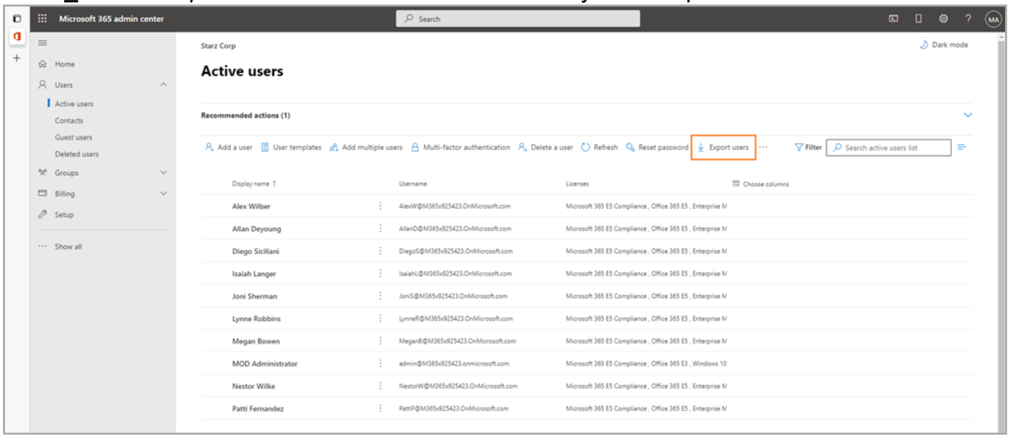
To prepare the CSV file:

1. Log in to the **Microsoft 365 admin center** (https://admin.microsoft.com) with the credentials of your *source* tenant administrator.

2. Export Users:

    a. From the navigation pane, click **Active users**.

    b. If needed, you can filter the set of users that you want to export. Then click **Export**. A *Users_<timestamp>.csv* file will be downloaded to your computer.

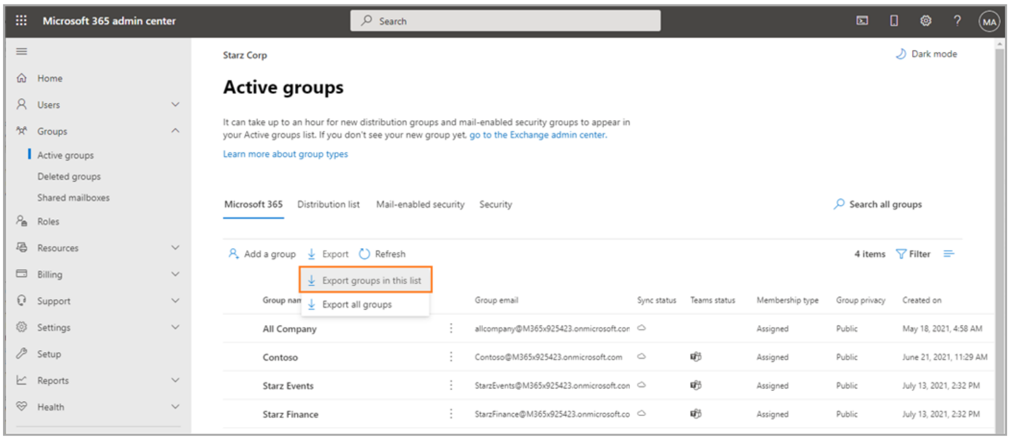


3. Export Groups:

    a. From the navigation pane, click **Active groups**.

    b. Select the **Microsoft 365** tab in the *Active Groups* page.

    c. If needed, you can filter the set of groups that you want to export. Click **Export** and then click **Export groups in this list**. A *Groups.csv* file will be downloaded to your computer.



4. Repeat steps 1-3 for the *target* tenant.

5. Create a new CSV file and add the attributes of the users and groups you want to map from the source to the target tenant, from the CSV files that you exported. You can follow any of the two formats shown below:

NOTE:

- CSV file must have two columns: <source-attribute-name> and <target-attribute-name>
- Supported attribute names:
  - **userPrincipalName** - An Internet-style login name for a user account based on the Internet standard RFC 822. Do not use a mail nickname or proxy address. When you use **UserPrincipalName** (UPN) as the column header, you can combine UPN and group object GUIDs in the same list
  - **objectId** - Globally unique identifier (GUID) of the user or group object. When you use **ObjectId** as the column header, you must specify object GUIDs only. You cannot specify UPNs.
- Account pairs in which one of the accounts is a guest account are not supported.
- CSV file names with non-ASCII characters are not supported.

Format 1 using **userPrincipalName**

	A	B
1	UserPrincipalName	UserPrincipalName
2	AdeleV@starz.OnMicrosoft.com	PeterParker@galaxy.OnMicrosoft.com
3	AlexW@starz.OnMicrosoft.com	AmandaRoberts@galaxy.OnMicrosoft.com
4	AllanD@starz.OnMicrosoft.com	AmarGrey@galaxy.OnMicrosoft.com
5	BenS@starz.OnMicrosoft.com	SusanRice@galaxy.OnMicrosoft.com
6	BiancaP@starz.OnMicrosoft.com	AlfredLittle@galaxy.OnMicrosoft.com
7	BrianJ@starz.OnMicrosoft.com	BartSimpson@galaxy.OnMicrosoft.com
8	Accounts@stars.Onmicrosoft.com	Finance@galaxy.OnMicrosoft.com
9	Help@stars.Onmicrosoft.com	HelpDesk@galaxy.OnMicrosoft.com
10		

Format 2 using **objectId**

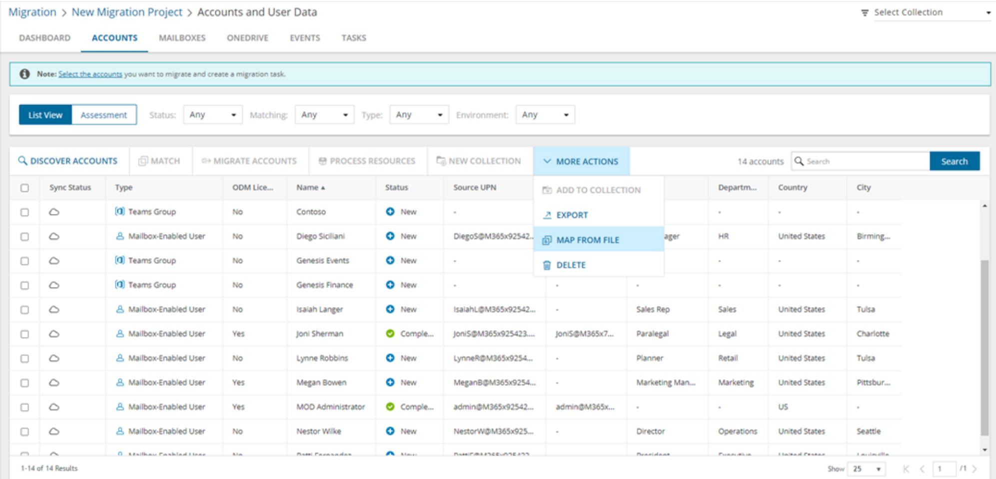
	A	B
1	Object Id	Object Id
2	c266f6df-80e7-4696-b99d-39fd5ed8b513	f109fa64-1aec-4f22-94dc-a391d1687ac8
3	a6ec70a2-4fb1-4a86-8673-8d4a2376a6b0	57068536-29d6-44cf-8dbb-86c9e41cefc5
4	5f42f8ed-4f49-467f-8499-2bafedf8dbd7	498ff194-a0e5-41e5-91af-acfcaec446a7
5	87559c29-4353-416b-b970-3aa2732dcdc3	ec5b25fa-576c-4622-8c5a-5f00a21fede0
6	76d4bda3-98db-4ba6-8961-710d06961502	58fa862d-5a90-494b-8128-96d446658472
7		

6. Save the CSV file that you created.

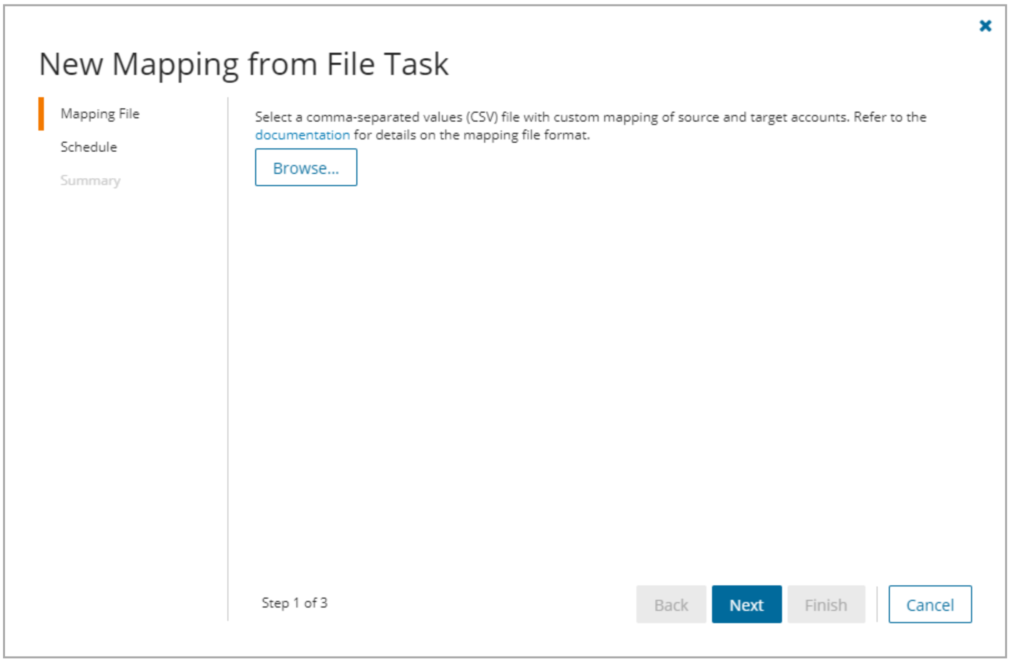
Create and run a New Mapping from File Task

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migration** to open the *My Projects* list.
3. Create a new project or select an existing project.

4. Click **Accounts** from the project tiles. You can also click **Open Project** to open the project dashboard and then click **Open** from the Accounts tile. The *Accounts and User Data* dashboard opens.
5. Click the **Match Accounts** link in the *Getting Started* tile
   - or -
   Select the **Accounts** tab and select **List View** if not already selected.
6. Click **More Actions** and then click **Map From File**.



7. The *New Mapping from File Task* wizard opens.
8. Step 1: **Account Matching**



   a. Click **Browse** and select the CSV file with the account maps that you prepared.
   b. Click **Next**.

9. Step 2: **Schedule**
    a. Choose from one of three options to schedule the task. The scheduler will be activated only after you complete the task wizard.
        - **Run now** - the task will run immediately.
        - **Run later** - the task must be started manually.
        - **Schedule** - specify a future date and time to run the task.
    b. Click **Next**.
10. Step 3: **Summary**
    a. Verify the task specifications as described below:
        i. **Name** - name of the task. You can specify a custom name.
        ii. **Source tenant** - name of the tenant where the statistics will be collected.
        iii. **Target tenant** - name of the target tenant in this project.
        iv. **Scheduled start** - date and time when the task will start. Now indicates that the task will start immediately.
    b. Click **Back** to revise or review a previous step or click **Finish** to complete the task wizard and start the task as scheduled.

You can track its progress in the **Tasks**tab, view the summary on the Dashboard or monitor alerts and notifications in the **Events**tab. When accounts are mapped successfully, the *Status* changes from New to Completed.

Migrating Accounts

CAUTION: Don't start the migration before the discovery task is finished.

When the matching is done, it is time to migrate source accounts that do not have the pairs on the target tenant. Create a new migration task:

1. Go to the migration project **Dashboard** in case you use new migration UI. In case you are using classic experience or you are already on the account migration Dashboard, go to step 3.
2. Click **Accounts** widget.
3. Click **Accounts**.
4. Select accounts / groups you want to migrate. In case you are planning to migrate Microsoft 365 Groups including content, it is recommended to perform migration using Teams as described in Migrating Groups and Associated Content

TIP: Use search, filtering or collections to quickly navigate through the list of accounts.

5. Click **Migrate Accounts** and provide vanity domain name instead of default `*.onmicrosoft.com`. Typically it is a domain name of your organization.

IMPORTANT: The custom domain name must be set up on the target tenant. See Quickstart: Add a custom domain name to Azure Active Directory for details.

6. Click **Next** to proceed.
7. Schedule when the task will be started. See Task Scheduling for details. Click **Next** to view the task summary.
8. Check selected options and name the task. Click **Finish** to save or start the task depending on schedule option selected.

The migration task is created. You can track its progress in the **Tasks**, view the summary on the Dashboard or monitor alerts and notifications in the **Events**.

> **IMPORTANT:** On Demand Migration does not synchronize end-user passwords as part of the data migration process. The migration administrator will need to reset or synchronize end-user passwords from the source tenant to the target tenant using native Office 365 tools or third-party Single Sign On tools.

Preferred Data Location

Each account may be assigned a **preferred data location** property in Azure Active Directory. During account migration the property is migrated from source to tenant. If the account preferred data location is set in the source then the same setting will be migrated to the target. If the preferred data location is not set in the source then it will not be set on the target. This works for General Tenant to Multi Geo Tenant and Multi Geo Tenant to Multi Geo Tenant migrations.

Migrating distribution lists with group delegations

On Demand migrates distribution lists with group delegations (SendAs and SendOnBehalf). Scenarios where the distribution list in the target exists or does not exist, exists and does or does not have group delegations, are all supported. When the distribution list with group delegations exists in the target then only newly added group delegations are migrated, group delegations are ignored if anything is deleted at the source. Existing SendAs and SendOnBehalf group delegations on the target, either preexisting before On Demand migration or migrated by On Demand will be left intact and merged with the one migrated from the source.

Objects are migrated as follows:

	Mail User	**Mail Box**	**Mail Enabled Security Group**	**Distribution List**
SendAs	Y	Y	Y	
SendOnBehalf	Y	Y	Y	Y

> **NOTE:** Microsoft does not support these objects in group delegations so they do not apply to the migration.
>
> - For SendAS: AAD User, External/Guest User, Distribution List, Security Group
> - For SendOnBehalf: AAD User, External / Guest User, Security Group

Guest User Migration

> **TIP:** Guest user accounts have specific icon to distinguish them from the domain members.

On Demand migration can process all guest user types supported by Microsoft.

Before adding a guest user account to the migration task, please consider the following:

- Guest user account cannot be migrated if an original account for this guest user is already in the target tenant. The guest user account should be matched but not migrated.
- Guest user account cannot be migrated in case a guest user account of the same original account is already in the target tenant. To update the target guest user account properties create a matching task to pair these guest user accounts and then migrate the source guest user account again
- Guest user account cannot be migrated in case the invitation procedure in source domain is not finished yet. In case acceptance procedure was skipped (this case is deprecated now, but such guest users still exist), and the acceptance status is empty, guest user can be migrated successfully.

Domain Coexistence

Mergers and acquisitions are often accompanied by the unification of brands and corporate identities, including the unification of email addresses. However, the full transition from source to target tenant might take a considerable amount of time. To close this gap, On Demand Migration offers the domain coexistence services, allowing your employees to send mail from new addresses and access cross-tenant data before the migration is finished. The following services are currently available on account migration dashboard:

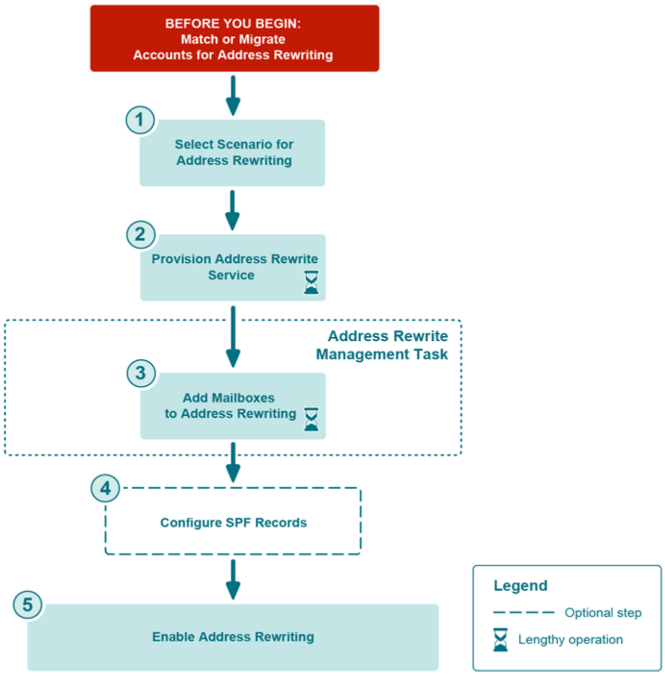
- Address Rewrite Service seamlessly changes the source users' email flow, as if they're already fully migrated to the target tenant. The outgoing mail addresses are substituted with the target ones, while all incoming mail is automatically redirected to the source mailbox. The address rewriting can be started once the account is matched or migrated, giving you time to prepare and migrate mailboxes without a rush. Address Rewrite Service requires additional licensing.
- Calendar Sharing allows users from the source and target tenants to see each other's free/busy information.

Address Rewrite Service

Address Rewrite Service substitutes the "From", "To" , and "Cc" addresses in the outgoing emails with the addresses from the target or source tenant depending on selected address rewriting scenario. All incoming mail is automatically redirected to the source or target mailbox according to specified mail forwarding direction. You can specify the users that are processed by the service, for example, only turn it on for Sales and Marketing team members. Address Rewrite Service requires additional licensing.

> **IMPORTANT:** The service only works with accounts that have pairs in the target tenant. Mailbox provisioning is not required, mail users are also supported. Check the documentation on matching or migrating accounts.

Basic Address Rewriting workflow consists of the following steps:



#	Step
1	Select Scenario for Address Rewriting
2	Provision Address Rewrite Service
3	Add mailboxes to address rewriting
4	Optionally: add Address Rewrite Service's IP address to the target DNS SPF record
5	Enable address rewriting. You can disable address rewriting at any time or turn off address rewriting for individual mailboxes

Address Rewrite Service Workflow

Address Rewrite Service is intended for creating a coexistence space for domains in which all the email messages coming from the source or target mail domain will look alike they was send from the unified mail domain according the selected settings. Address Rewrite Service will take all the necessary steps for creating this coexistence space in Exchange online environment including creating and managing all necessary connectors, mail flow rules, mail-enabled users and groups both in source and target environments, leaving on behalf of administrator only adding or removing source mail user to this coexistence space and activating / deactivating Address Rewrite Service.

The basic mail message flow in domain coexistence with Address Rewrite Service looks like:

Unified mail domain on the target tenant

1. When user sends an email as user@source domain mail user it redirected to Address Rewrite Service server in case it is addressed to the external recipients.
2. Address Rewrite Service receives email from user@source domain, check mail user eligibility to make address rewriting and then process it by rewriting @source mail domain to @target mail domain for every address of users added to coexistence space. These addresses in "From", "To" and "Cc" of the email

message are rewritten for all external recipients. Then Address Rewrite Service pass the processed email message to target Exchange Online environment. Internal recipients that reside in source receive this email message with unchanged addresses.

3. Target Exchange Online sends message to external recipients as it was sent by user from @target mail domain, all addresses of users added to coexistence scope in "From", "To" and "Cc" are rewritten for external recipients.
4. External recipient doesn’t aware about @source and replies (or create a new email) to the @target mail user.
5. When the reply or a new mail arrives to target mail domain it will be forwarded to the source. Source recipient gets message as it was natively forwarded from target Exchange online environment from corresponding user@target email user

Unified mail domain on the source tenant

1. When user sends an email as user@target domain mail user, it redirected to Address Rewrite Service server in case it is addressed to the external recipients.
2. Address Rewrite Service receives email from user@target domain, check mail user eligibility to make address rewriting and then process it by rewriting @target mail domain to @source mail domain for every address of users added to coexistence space. These addresses in "From", "To" and "Cc" of the email message are rewritten for all external recipients. Then Address Rewrite Service pass the processed email message to source Exchange Online environment. Internal recipients that reside in source receive this email message with unchanged addresses.
3. Source Exchange Online sends message to external recipients as it was sent by user from @source mail domain, all addresses of users added to coexistence scope in "From", "To" and "Cc" are rewritten for external recipients.
4. External recipient doesn’t aware about @target and replies (or create a new email) to the @source mail user.
5. When the reply or a new mail arrives to source mail domain it will be forwarded to the target. Target recipient gets message as it was natively forwarded from source Exchange online environment from corresponding user@source mail user

TIP: If Exchange Server Integration failed, click **Try to fix** button and Quest try to help you resolve the issue.

Address Rewrite Service Considerations

Each customer has a dedicated environment and inbound IP address for Address Rewrite Service.

The following groups, connectors and rules appear in Exchange Admin Centers after Exchange Server Integration is configured:

CAUTION: Do not edit or remove the groups, connectors and rules related to Address Rewrite Service otherwise the service may fail. These rules can be removed manually only if address rewriting no longer needed.

On source tenant:

- **Quest On Demand Coexistence** group contains accounts (recipients) joined to Address Rewriting
- Inbound **Quest Coexistence Connector** helps control mail flow for Address Rewrite Service from Office 365 to the organization

- Outbound **Quest Coexistence Connector** helps control mail flow for Address Rewrite Service from the organization to Office 365
- **Quest Coexistence Rules** implement Address Rewriting messaging policy for accounts joined to Address Rewriting

On target tenant:

- **Quest Coexistence Connector** helps control flow of email messages for Address Rewrite Service from the organization to Office 365

IMPORTANT: The service only works with accounts that have pairs in the target tenant. You should match or migrate an account before adding it to address rewriting.

NOTES:

- Target mail-enabled users should be configured to **redirect messages from target to the source mailbox**. See Switching Clients for details.
- In case an email is sent to a group of people, including a migrated user, that email is automatically forwarded to the migrated user, and then if the migrated user clicks **Reply all**, he / she gets a copy of his / her reply message. This is default behavior.

Address Rewriting Scenarios

Address Rewriting supports the following scenarios:

- Replace senders' address with the target primary email address.
- Replace senders' address with the source primary email address.

NOTE: The address is only rewritten in the mail that goes to the recipients outside your organization. Internal users receive the mail with the original address.

IMPORTANT: Office 365 Advanced Threat Protection default settings may cause issues with the Address Rewriting Service.

Please ensure that "Automatic forwarding" is set to "On" in the "Outbound spam filter policy" for your source or target tenant depending on the rewriting scenario you choose.

Rewriting senders' address to the target address

Use case: users from the source tenant need to communicate with external recipients from the name of the target organization. It usually happens when the mail migration is not yet finished, but you want to use the consistent branding.

To rewrite senders' address to ones from the target select **To target** for the **Rewrite senders' address to** on the Domain Coexistence widget. You cannot change this setting after Address Rewrite Service is provisioned.

Check **Senders' Address** property on the **Mailboxes** tab to find the effective email address after rewriting. If the account don't have the Exchange mailbox provisioned in the target tenant (mail user), the target primary SMTP address is used for address rewriting.

IMPORTANT: To ensure that all incoming mail is automatically redirected to the source mailbox, set **Mail Flow** to **To source**. See Switching Clients for details.

Rewriting senders’ address to the source address

Use case: migrated users need to communicate with external recipients from the name of the source organization. It usually happens when you need to keep the original brand while merging all accounts in the target tenant.

To rewrite senders’ address to ones from the source select **To source** for the **Rewrite senders’ address to** on the Domain Coexistence widget. You cannot change this setting after Address Rewrite Service is provisioned.

Check **Senders' Address** property on the **Mailboxes** tab to find the effective email address after rewriting.

> **NOTE:** Check that the **Mail Flow** for the mailbox is set to **To target**. See Switching Clients for details.

Provisioning the Address Rewrite Service

> **IMPORTANT:** After Address Rewrite Service provisioning starts, you cannot change the setting of the sender's address to be rewritten.

1. Open the project dashboard.
2. Click **Provision** for **Address Rewrite Service** from the **Domain Coexistence** widget.
3. Wait until the service is provisioned and **Exchange Server Integration** is successfully configured.

The provisioning might take some time. In the meanwhile, you can select the mailboxes for the address rewriting.

Selecting Mailboxes for Address Rewriting

1. Go to the migration project **Dashboard** in case you use new migration UI. In case you are using classic experience or you are already on the account migration Dashboard, go to step 3.
2. Click **Accounts** widget.
3. Open **Mailboxes** tab or click **Select** in the **Domain Coexistence** widget.

> **TIP:** To optimize the matching, migration and address rewriting, organize accounts into a collection.

4. Click **Off** in **Address Rewrite** facet to show the mailboxes that are ready for address rewriting.

> **IMPORTANT:** Address Rewrite Service only works with accounts that have pairs in the target tenant. You can click **Not Supported** in **Address Rewrite** facet to see the mailboxes that are not ready for address rewriting.

5. Select the mailboxes and click **Address Rewrite**.
6. In **Address Rewrite Management** task, select **Turn on address rewriting for selected mailboxes**.
7. Click **Next** to view the task summary. Check selected options, name the task, and click **Finish** to start the task.
8. The task is created. You can track its progress in the **Tasks** or monitor alerts and notifications in the **Events**.

You can add the mailboxes to address rewriting at any time. Note, that if the Address Rewriting Service is already enabled, it might take a while before the rewriting will be enabled for the newly added mailbox. Check that **Address Rewrite** status is **On** for the mailbox.

Configuring SPF Record

During the provisioning phase, we configure the target Exchange Server to correctly handle messages, processed by Address Rewrite Service. If you want to be absolutely sure that the messages are not blocked by custom filters and antiviruses, add the service's IP address to SPF record in target DNS.

- On **Domain Coexistence** widget, click **Running** to locate the event containing IP address of the Address Rewrite Service server.
- Add the IP address to the SPF record in the target DNS. See provider's documentation for instructions.

Enabling Address Rewriting

1. Make sure you have added the mailboxes to address rewriting. Click **On** in **Address Rewrite** facet to show the joined mailboxes.
2. Go to the account migration dashboard and click **Enable Coexistence** in **Domain Coexistence** widget.

Disabling Address Rewriting for Individual Mailboxes

1. Go to the migration project **Dashboard** in case you use new migration UI. In case you are using classic experience or you are already on the account migration Dashboard, go to step 3.
2. Click **Accounts** widget.
3. Open **Mailboxes**
4. Click **On** in **Address Rewrite** facet to show the mailboxes for which address rewriting is enabled.
5. Select the mailboxes for which you want to turn off address rewriting and click **Address Rewrite**.
6. In **Address Rewrite Management** task, select the **Stop address rewriting for the selected mailboxes** option.
7. Click **Next** to view the task summary. Check selected options, name the task, and click **Finish** to start the task.
8. The task is created. You can track its progress in the **Tasks** or monitor alerts and notifications in the **Events**.

Disabling Address Rewriting

1. Go to the migration project **Dashboard** in case you use new migration UI. In case you are using classic experience or you are already on the account migration Dashboard, go to step 3.
2. Click **Accounts** widget.
1. Click **Disable** in the **Domain Coexistence** widget.

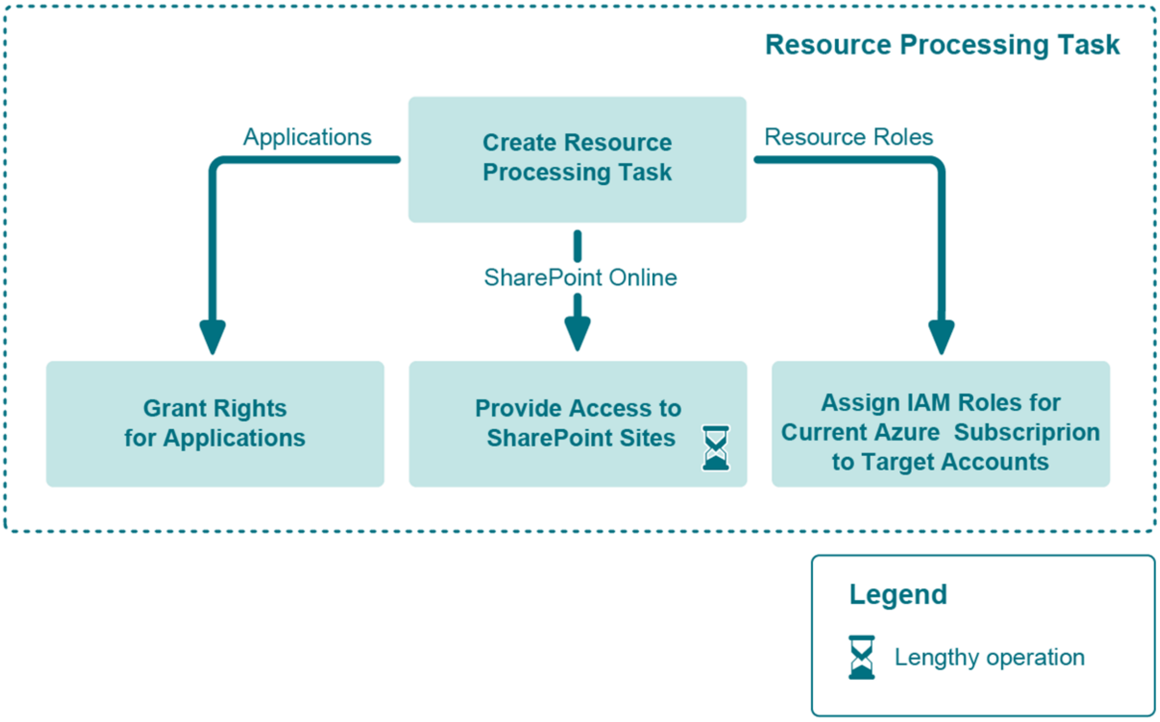
NOTE: You can turn Address Rewrite Service off at any time to stop sending outgoing messages with substituted email address. The list of joined mailboxes is not affected.

CAUTION: Disable Address Rewrite Service in case you want to delete the migration project.

Resource Processing

Once the account migration is complete, you might want to grant target accounts access to source tenant's resources and applications.

Basic resource processing workflow consists of the following steps:



IMPORTANT: Resource processing does not copy resources to the target tenant. It simply provides the access to source resources by creating a linked guest user in the source for each migrated / matched target account. These guest users are granted the same permissions as the corresponding source accounts and become members of the same SharePoint groups.

Only permissions directly granted to the source account are transferred.

See the Processing Resources for step by step instruction how to configure resource processing.

Processing Resources

On Demand Migration can process the following resources on the source tenant:

- Microsoft SharePoint
- Resource roles related to selected accounts
- Applications assigned to selected accounts.

NOTE: Resource Processing is not available when GCC High tenants are used. Resource Processing is only available with commercial tenants. Resource Processing is not available when credentials are not provided.

To create a new processing task:

1. Go to the migration project **Dashboard** in case you use new migration UI. In case you are using classic experience or you are already on the account migration Dashboard, go to step 3.
2. Click **Accounts** widget.
3. Select accounts for which you want to process the resources on **Accounts** tab.
4. Click **Process Resources**
5. Specify the affected resources:
    a. **Process SharePoint**

       Provide the root URL of the SharePoint site. See Processing SharePoint for details on site configuration and required permissions.

    b. **Process resource roles**

       Process Role-Based Access Control (RBAC) roles for current Azure subscription.

    c. **Process application assignment**

       See the Processing Application Assignments for details.

    d. **Process azure group membership**

       Select this option so target users are granted access to source systems when an Active Directory group they are a part of is granted access. The process identifies the Active Directory groups the selected users (on the source) are part of and adds the target users to those groups.
6. Click **Next** to proceed.
7. Schedule when the task will be started. See Task Scheduling for details. Click **Next** to view the task summary.
8. Check selected options and name the task. Click **Finish** to save or start the task depending on schedule option selected.

The task is created. You can track its progress in the **Tasks**, view the summary on the Dashboard or monitor alerts and notifications in the **Events**.

Processing SharePoint

Processing SharePoint allows target users access sites, libraries, lists, and other content on the source tenant by creating a linked guest user in the source for each migrated / matched target account. Then the guest user is granted the same direct permissions as the corresponding source account to access source SharePoint resources. It can take time for these guest accounts to replicate to SharePoint, which can result in an **User not found** error message for a guest account that has not yet been replicated during granting permissions. In this case, retry the SharePoint processing later.

In order to process SharePoint resources, you must perform the following:

1. Turn on external sharing in SharePoint admin center. For details, see Turn external sharing on or off for SharePoint.

2. Grant consent for On Demand Migration to process SharePoint resources.

See Required Consents and Permissions section for the minimum permissions required to perform this task.

Processing Application Assignments

Application assignments processing ensures that the target users see the same list of cloud applications on http://myapps.microsoft.com/ as their source counterparts. See Processing Resources for more details.

NOTE: On Demand Migration assigns applications to the target users, but it’s up to each particular application how to check the access level. Some applications may have their own account databases and permission assignments, thus their access rights must be provisioned manually.

See Required Consents and Permissions section for the minimum user account permissions required to perform this task.

4

Mail Migration

Basic mailbox migration workflow consists of the following steps:

#	Step
1	
2	Migrating Mailboxes
3	Configure mail forwarding from target to source
4	Configure notifications for mailbox owners
5	Switch mailboxes

Collecting Statistics

A Mailbox **Collect Statistics Task** conducts an assessment of mailboxes of selected accounts in the source tenant and provides the following information:

- Size of the mailbox
- Number of items in the mailbox

Each Mailbox Collect Statistics Task generates events. Events are milestones that a task achieves as it runs. For example, when a Mailbox Collect Statistics Task starts, an event is logged and it appears in the events list. When the number of accounts that are selected for assessment is large, the Mailbox Collect Statistics Task divides the total number of accounts into manageable sets. Each set is called a batch. When a batch of accounts is assessed, another event occurs.

The Mailbox Collect Statistics Task and its events provide additional information about the mailbox for the set of source tenant accounts that are assessed.

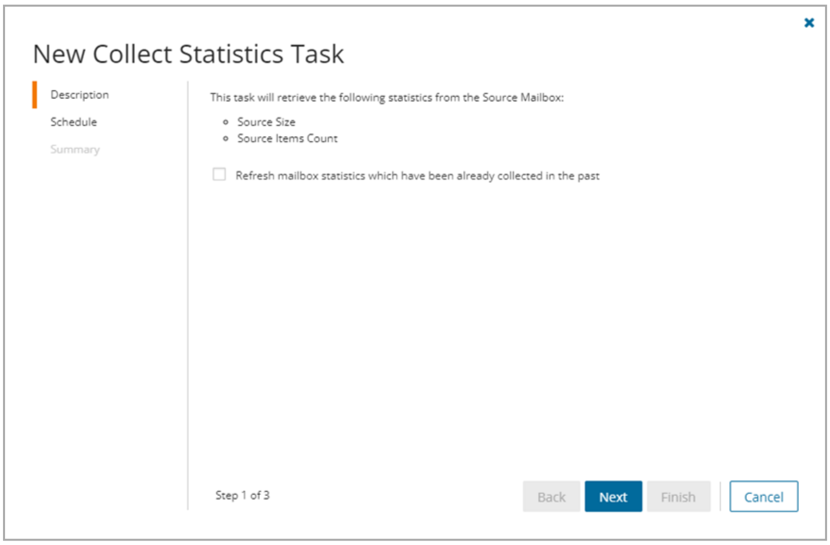
NOTE: Before you proceed, verify that the source tenant accounts have been discovered. For more information see Discovering Accounts

In this topic:

- Create and run a Mailbox Collect Statistics Task
- Review the Mailbox Collect Statistics Task
- Review the events for the Mailbox Collect Statistics Task
- Review the statistics collected

Create a New Collect Statistics Task

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migration** to open the *My Projects* list.
3. Create a new project or select an existing project.
4. Click **Mail** from the project tile. You can also click **Open Project** to open the project dashboard and then click **Open** from the Mailbox tile. The *Accounts and User Data* dashboard opens.
5. Select the **Mailboxes** tab and then select **List View** if not already selected.
6. Select the accounts in the list from where you want to collect statistics. You can use search, filtering or collections to quickly navigate through the list of mailboxes. You can select the check box in the table header to select all the accounts.
7. Click **Collect Statistics**from the *Actions* ribbon. The *New Collect Statistics Task* wizard opens.
8. Step 1:**Description**
    a. Select the check box **Refresh mailbox statistics which have been already collected in the past** if needed.
    b. Click **Next**.

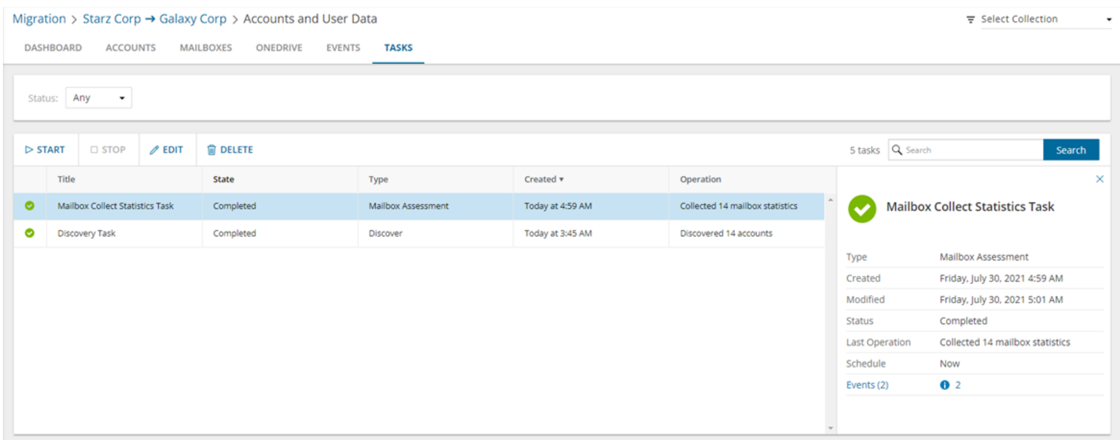


9. Step 2:**Schedule**
    a. Choose from one of three options to schedule the task. The scheduler will be activated only after you complete the task wizard.
        - **Run now** - the task will run immediately.
        - **Run later** - the task must be started manually.
        - **Schedule** - specify a future date and time to run the task.
    b. Click **Next**.

10. Step **Summary**
    a. Verify the task specifications as described below:
        i. **Name** - name of the task. You can specify a custom name.
        ii. **Source tenant** - name of the tenant where the statistics will be collected.
        iii. **Target tenant** - name of the target tenant in this project.
        iv. **Scheduled start** - date and time when the task will start. Now indicates that the task will start immediately.
    b. Click **Back** to revise or review a previous step or click **Finish** to complete the task wizard and start the task as scheduled.

Review the Mailbox Collect Statistics Task

1. Select the **Tasks** tab.
2. Select the Mailbox Collect Statistics Task that you want to review.
3. In the task details pane that opens, the information presented is as described below:
    a. **Type** - Type of the task. The type is `Mailbox Assessment`.
    b. **Created** - Date and time when the task was created.
    c. **Modified** - Date and time when the task was last updated.
    d. **Status** - State of the task.
    e. **Last Operation** - The action that was most recently performed in this task.
    f. **Schedule** - Date and time when the task started. Now indicates that the task started immediately after the task was created.
    g. **Events (*number*)** - The number of events that the task encountered.

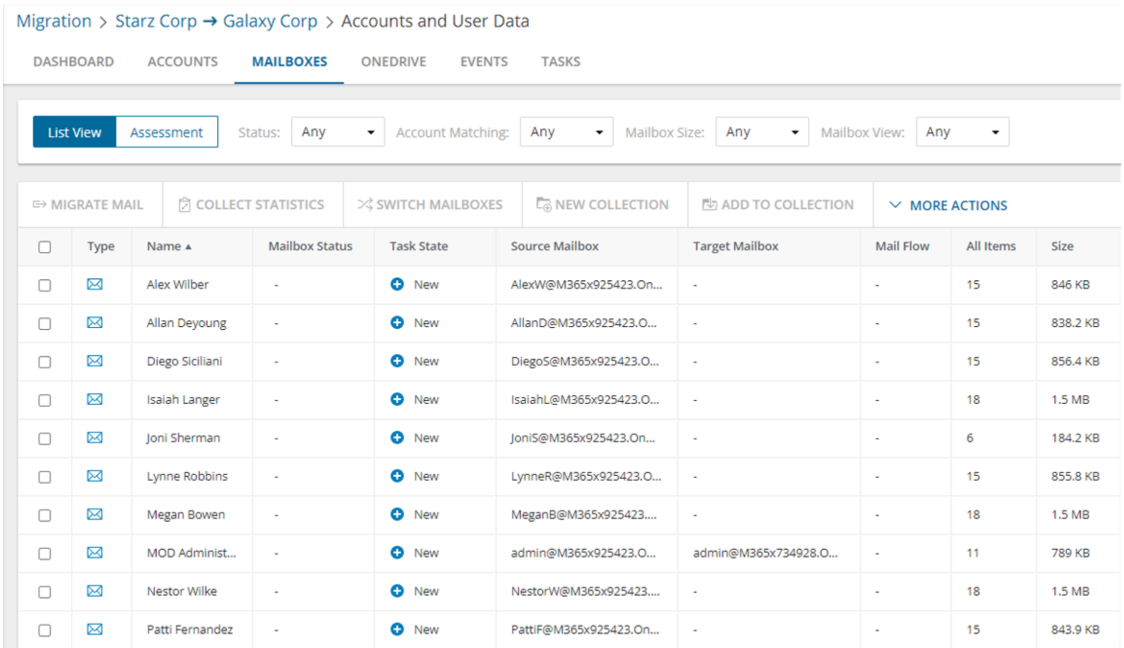


Review the Mailbox Collect Statistics Task Events

1. Select the **Tasks** tab.
2. Select a task named **Mailbox Collect Statistics Task** that you want to review.
3. In the task details pane that opens, click **Events (*number*)**. The *Events* tab opens with a filtered list of events for the selected task.
4. Select an event that you want to review. In the task details pane that opens, the information presented is as described below:
    a. **Object** - Not applicable for this event.
    b. **Task** - Name of the task.
    c. **Time** - Date and time when the event occurred.
    d. **Category** - Type of task. the value is **Mailbox Assessment**.

Review the statistics collected

1. Select the **Mailboxes** tab and then select **List View** if not already selected.
2. Inspect the results of the task in the table as described below:
    a. **Name** - Name of the account in the source tenant.
    b. **All Items** - Number of items in the mailbox. If there is no value the account has not yet been assessed or the mailbox has not been used.
    c. **Size**- Total size of all the items in the mailbox. If there is no value the account has not yet been assessed or the mailbox has not been used.



Type	Name ▲	Mailbox Status	Task State	Source Mailbox	Target Mailbox	Mail Flow	All Items	Size
	Alex Wilber	-	New	AlexW@M365x925423.On...	-	-	15	846 KB
	Allan Deyoung	-	New	AllanD@M365x925423.O...	-	-	15	838.2 KB
	Diego Siciliani	-	New	DiegoS@M365x925423.O...	-	-	15	856.4 KB
	Isaiah Langer	-	New	IsaiahL@M365x925423.O...	-	-	18	1.5 MB
	Joni Sherman	-	New	JoniS@M365x925423.On...	-	-	6	184.2 KB
	Lynne Robbins	-	New	LynneR@M365x925423.O...	-	-	15	855.8 KB
	Megan Bowen	-	New	MeganB@M365x925423....	-	-	18	1.5 MB
	MOD Administ...	-	New	admin@M365x925423.O...	admin@M365x734928.O...	-	11	789 KB
	Nestor Wilke	-	New	NestorW@M365x925423....	-	-	18	1.5 MB
	Patti Fernandez	-	New	PattiF@M365x925423.On...	-	-	15	843.9 KB

Assessment

When you complete the collection of statistics for the mailboxes you can view the reports about the mailboxes. Switch to the **Assessment** view to see the reports on the mailboxes.

The following reports are available for **Mailboxes**:

- Mailbox statistics
  - Total mailboxes
  - Total size
  - Average size
  - Maximal size
  - Average Item Count
- To clean up
  - The users not logged on to mailbox for 30 days
  - The users not logged on to mailbox for 90 days
  - The users never logged on to mailbox
  - Disabled users with mailbox
- Inventory
  - Mailboxes with archive
- To adjust
  - Mailboxes with duplicate user name

When you are done with the assessment you are ready to start the migration.

Migrating Mailboxes

Make sure that all associated accounts are matched or migrated and create the Mail Migration task:

> **NOTE:** Before you proceed, verify that the source tenant accounts have been discovered. For more information see Discovering Accounts

Steps to migrate mailboxes

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migration** to open the *My Projects* list.
3. Create a new project or select an existing project.
4. Click **Mail** from the project tile. You can also click **Open Project** to open the project dashboard and then click **Open** from the **Mail** tile. The *Accounts and User Data* dashboard opens.
5. Select the **Mailboxes** tab. The *Discover Accounts* list opens. If you don't see a list of accounts, you must run the **New Discovery Task** again.

6. Select the mailbox accounts in the list that you want to migrate. You can use search, filtering or collections to quickly navigate through the list of mailboxes. You can also select the check box in the table header to select all the mailbox accounts.
7. From the local toolbar, select **Migrate Mail**. The *New Mail Migration Task* wizard opens.
8. Step1: **Licensing Plan**
   a. **Set license at the target** - select this check box to assign a selected license to migrated mailbox accounts in the target tenant. Clear the check box to skip license assignments for migrated mailbox accounts.
   b. **Select the licensing plan** - this drop down appears if the **Set license at target** check box is checked. Select the licensing plan from the drop down that you want to assign to migrated mailboxes.
   c. Specify how the selected licensing plan will be assigned to the target accounts:
      - **Assign the plan to accounts without Exchange Online option. Licensed users will retain the existing plans** - Retain the existing licenses and assign the selected plan only to unlicensed accounts (default). Licensed users will retain the existing plans.
      - **Assign the plan to all accounts. Licensed users will be switched to the selected plan** - Replace all license assignments with the licenses from the selected plan. Licensed users will be switched to the selected plan.

      NOTE:

      - Resource mailboxes that have not been licensed on the source tenant will retain the unlicensed status.
      - Licensed resource mailboxes will be handled according to the selected option.
      - In case no usage location is set on the target the source value will be used for the assigned license. Otherwise the target usage location value remain unchanged and can be modified manually, if necessary.
      - If no license plan is selected users that are unlicensed at the target will fail to migrate.
      - Selected licensing option is only applicable to Exchange Online. It does not affect the licensing plans picked for OneDrive Migration
   d. Click **Next.**
9. Step 2: **Migration Options**
   a. Specify a migration flow:
      - From **Primary Mailbox** to **Primary mailbox** - migrate content of the primary mailbox (default scenario.)
      - From **Archive mailbox** to **Archive mailbox** - migrate content of the archive mailbox.
      - From **Archive mailbox** to **Primary mailbox** - restore archived content to primary mailbox.
      - From **Primary mailbox** to **Archive mailbox** - migrate some of the content of the primary mailbox to archive. Useful with the specific **Migration Options** selected.

      TIP: It can take a while to migrate mail to archive mailboxes. Source mailboxes that have archives can be easily selected using **Inventory**report on **Assessment** view of **Mailboxes**. It would be useful to re-run the Discovery task to update the information.

b. Specify which mailbox items you want to transfer to the target by selecting the appropriate check box: **Mail**, **Calendar**, **Contacts**, **Tasks/Notes**.

c. **Migrate OWA Inbox Rules** - select this option to migrate OWA Inbox rules. For all mailboxes that are migrated to existing target mailboxes, On Demand Migration removes the existing rules from the target tenant like OWA Inbox rules and the rules created in Outlook from the target tenant including previously-migrated rules. Then all the rules from the source are migrated to the target.

d. **Migrate Recoverable Items** - select this option to migrate recoverable items, mailbox delegation, and folder permissions. If the check box is unchecked these items will not be transferred.

e. **Migrate Mailbox Delegation** - select this option to migrate delegation permissions. Mailbox delegation permissions like **Full Access**, **Send As** and **Send On Behalf** can be transferred if the matched delegate exists in the target tenant. If the matched delegate does not exist, mailbox delegation cannot be migrated and an error event will occur. If the target mailbox delegation is not set, the mailbox delegation will be transferred as is. If the mailbox delegation has been set in the target tenant before the migration starts, rules and exceptions specified in Migrating Delegate Access Permissions topic in the *On Demand Migration for Email User Guide* are applied to set the mailbox delegation.

f. **Migrate Folder Permissions**- select this option to migrate folder permissions. If folder permissions in the target mailbox do not exist, then folder permissions from the source mailbox will be transferred as is. If folder permissions were already set in the target mailbox before the migration starts, rules and exceptions specified in Migrating Folder Permissions topic in the *On Demand Migration for Email User Guide* are applied to set the folder permissions.

> **NOTE:** Migration of folder permissions for **Recoverable Items** is not supported.

g. **Migrate Auto-Reply settings** - select this option to migrate auto-reply settings.

h. Click **Next.**

10. Step 3: **Mail Flow**

a. **Enable/Disable Mail Forwarding** - select this check box to control mail forwarding. This check box is selected by default. When this check box is selected, you can choose from the following options:

- **Enable Mail Forwarding** - Enable Mail Forwarding (on by default for the initial New Mail Migration Task) from Target to Source. On Demand Migration assumes that end-users will not be using their new target mailboxes immediately after the first "Migrate Mail" task (cut-over), so forwarding is set on the new target mailbox to forward any new mail that is received in the target back to the source. This way any new mail is assured to be delivered to the active end-user mailbox.
  - **Mail forwarding direction** - Set the mail forwarding direction by choosing **From target to source** or **From source to target**. From the On Demand Migration table of mailboxes, the forwarding email is in the Source Mailbox / Target Mailbox depending on the mail forwarding direction selected.
  - **Custom domain for forwarding** - Specify the custom domain name for forwarding email addresses. If the domain is omitted or does not exist, the primary SMTP address will be used. See the **Mail Flow** column value (To Source or To Target) which can be switched with the switch mailboxes functionality (see Switching Clients).
- **Disable Mail Forwarding** - Choose this option to remove any populated mail forwarding address. Use this option to remove forwarding addresses in source mailboxes before the

migration and target mailboxes after the migration. You cannot disable mail forwarding using the switch mailboxes functionality described in the topic Switching Clients.

   b. Click **Next.**

11. Step 4: **Mail Folders**

    a. Specify which mail folders to migrate and where they should be migrated by selection one of the following options

       - **Migrate all folders** - select this option to migrate all folders from the source to the tenant. Mail will be migrated to a folders with the same name in the target tenant.
       - **Migrate all folders except** - select this option to ignore the mailboxes from the selection provided. Provide a target folder name corresponding to the source folder (inbox, deleted, archive, sent items).
       - **Migrate specific folders** - select this option to migrate specific folders from the list provided, and specify the target folder. Well known folders such as inbox, deleted, archive, and sent items can be migrated to a custom mailbox. For example *Inbox* on the source can be migrated to *Inbox-Migrated* on the target. If you do not provide a target folder name then the mail migration service will migrate the contents of the source folder to a folder of the same name on the target.

    b. Click **Next.**

12. Step 5: **Date Range**
    Limit the date range for content transfer. You can set any of the following options:

    a. **Migrate mail before** to set end date for the date range
    b. **Migrate mail after** to set start date for the date range
    c. Click **Next.**

13. Step 6: **Schedule**

    a. Choose from one of three options to schedule the task. The scheduler will be activated after you complete the task wizard.

       - **Run now** - the task will run immediately.
       - **Run later** - the task must be started manually.
       - **Schedule** - specify a future date and time to run the task.

    b. Click **Next**.

14. Step 7: **Summary**

    a. Review the task summary. You can specify a custom task name.
    b. Click **Finish** to save or start the task depending on the schedule option selected.

How to track the migration

You can track a task's progress from the **Tasks** tab, view the summary on the Dashboard or monitor alerts and notifications in **Events**.

You can track the migration of objects from the **mailbox status** column of the mailboxes migration user interface. The column values are as follows:

Mailbox status column value	Description of value
--: A dash	There is an existing migration. The system is unable to fetch and set the value of already migrated objects.
New	The migration has not yet started.
Provision	The mailbox is being provisioned.
Migrating	The migration of this object has started.
Migrated	The migration is complete and successful.
Migrated with errors	Migration is completed with errors.
Switched	Mailbox is switched between source and target.

Mailbox Migration Considerations

- The following types of mailboxes are supported: Regular, Room, Equipment (Resource), Shared.
- In case of re-migration, On Demand Migration remigrates mail, calendar, task, and sticky note items that have changed in the source mailbox to the target mailbox. Also, calendar items that have been removed from the source mailbox will be removed from the target mailbox. Re-migration of other types of items that have been modified or deleted in the source mailbox is not supported.
- During the mail migration, users might receive email to both source and target mailboxes. Apparently the users might want to receive the email sent to both mailboxes or keep custom forwarding, if any. To achieve this, we automatically set up mail forwarding from target to source which works until the clients are switched to the target tenant.

Switching Clients

The mail migration is complete and you have deployed Update Agent in your on premises environment. Now it is time to switch the Outlook clients to the target Exchange Online.

NOTE: Update Agent may incorrectly switch the client profile during the transfer of the vanity domain name from the source tenant to the target tenant. It is not recommended to create a Mailbox Switch task during domain name transfers.

Create a Mailbox Switch Task:

1. Go to the migration project **Dashboard** in case you use new migration UI. In case you are using classic experience or you are already on the account migration Dashboard, go to step 3.
2. Click **Accounts** widget.
3. Open **Mailboxes**.
4. Select the migrated mailboxes.

NOTE: Only migrated mailboxes can be switched. Use filtering by **Completed** status to see all migrated mailboxes.

5. Click **Switch Mailboxes**.
6. Specify mail forwarding direction:
    - **From source to target** – standard switching scenario (switch). The clients are automatically switched to the target tenant, but custom forwarding, if set, remains unchanged as described in Mail Forwarding Scenarios
    - **From target to source** – reverse scenario (unswitch). The users are connected to the source tenant and all email sent to the target addresses are forwarded to the source / to custom forwarding address, if set, as described in Mail Forwarding Scenarios.

TIP In case of Outlook 2013 usage, the external Auto-discover service is required for reverse scenario. You can use Microsoft Office Outlook Connectivity Tests (Office 365 tab) to check whether Service Connection Point (SCP) is available from the cloud. Otherwise the switch fails and the following message is returned by server: **Auto-discover service returned: Unauthorized**.

7. Provide the custom domain name for forwarding, typically your corporate domain name. Click **Next**. To use the same target domain name that was used on the source, you should check whether you have completed all steps of the Tenant to Tenant Migration with Domain Transfer Scenario

IMPORTANT: The custom domain name must be set up on the target tenant. See Quickstart: Add a custom domain name to Azure Active Directory for details.

8. Configure notification messages (optional), if necessary. See Configuring Notifications for Mailbox Owners for details.
9. Schedule when the task will be started. See Task Scheduling for details. Click **Next** to view the task summary.
10. Check selected options and name the task. Click **Finish** to save or start the task depending on schedule option selected.

The task is created. You can track its progress in the **Tasks**, view the summary on the Dashboard or monitor alerts and notifications in the **Events**.

Configuring Notifications for Mailbox Owners

On Demand Migration allows to configure notification messages that appear after successful switch in:

- in new target mailboxes and / or in original source mailboxes (used now) in case you have selected **Source to target** mail forwarding direction on **Mail Flow** page
- in "new" (destination) source mailboxes and / or in original target mailboxes (used now) in case you selected **Target to source** mail forwarding direction on **Mail Flow** page

The following can be configured :

- **Sender's email address** - specifies email to replay (optional). In case no replay needed you can skip this field. In this case no email address will be displayed in the message.
- **Send from:** - specifies sender that will be displayed to user
- **Subject:** - specifies message subject
- **Message:** - specifies message text (plain text only)

Mail Forwarding Scenarios

To support the customer preferences related to mail forwarding, the following behavior is now supported for mail migration task in case forwarding is not set using On Demand Migration (**Mail Flow** column is empty) and for mailbox switch (standard and reverse scenarios) tasks:

	Before		After	
Task Type	Source. ForwardingSMTPAddress	Target. ForwardingSMTPAddress	Source. ForwardingSMTPAddress	Target. ForwardingSMTPAddress
Mail migration	Points to target *	Not set / Set to any SMTP address	Not set (cleared)	Source.PrimarySMTPAddress
	Points to any SMTP address except for target *	Not set / Set to any SMTP address	Remains unchanged	Source.PrimarySMTPAddress
	Not set	Not set / Set to any SMTP address	Not set	Source.PrimarySMTPAddress
Switch (**From source to target** option)	Not set / Set to any SMTP address	Points to source**	Target.PrimarySMTPAddress or one of the existing email addresses from selected custom domain for forwarding, if set	Not set (cleared)
	Not set / Set to any SMTP address	Points to any SMTP address except for source **	Target.PrimarySMTPAddress or one of the existing email addresses from selected custom domain for forwarding, if set	Remains unchanged
	Not set / Set to any SMTP address	Not set	Target.PrimarySMTPAddress or one of the existing email addresses from selected custom domain for forwarding, if set	Not set
Unswitch (**From target to source** option)	Points to target *	Not set / Set to any SMTP address	Not set (cleared)	Source.PrimarySMTPAddress or one of the existing email addresses from selected custom domain for forwarding, if set
	Points to any SMTP address except for target *	Not set / Set to any SMTP address	Remains unchanged	Source.PrimarySMTPAddress or one of the existing email addresses from selected custom domain for forwarding, if set
	Not set	Not set / Set to any SMTP address	Not set	Source.PrimarySMTPAddress or one of the existing email addresses from selected custom domain for forwarding, if set

* Target.PrimarySMTPAddress or any of Target.EmailAddresses

** Source.PrimarySMTPAddress or any of Source.EmailAddresses

Tenant to Tenant Migration with Domain Transfer Scenario

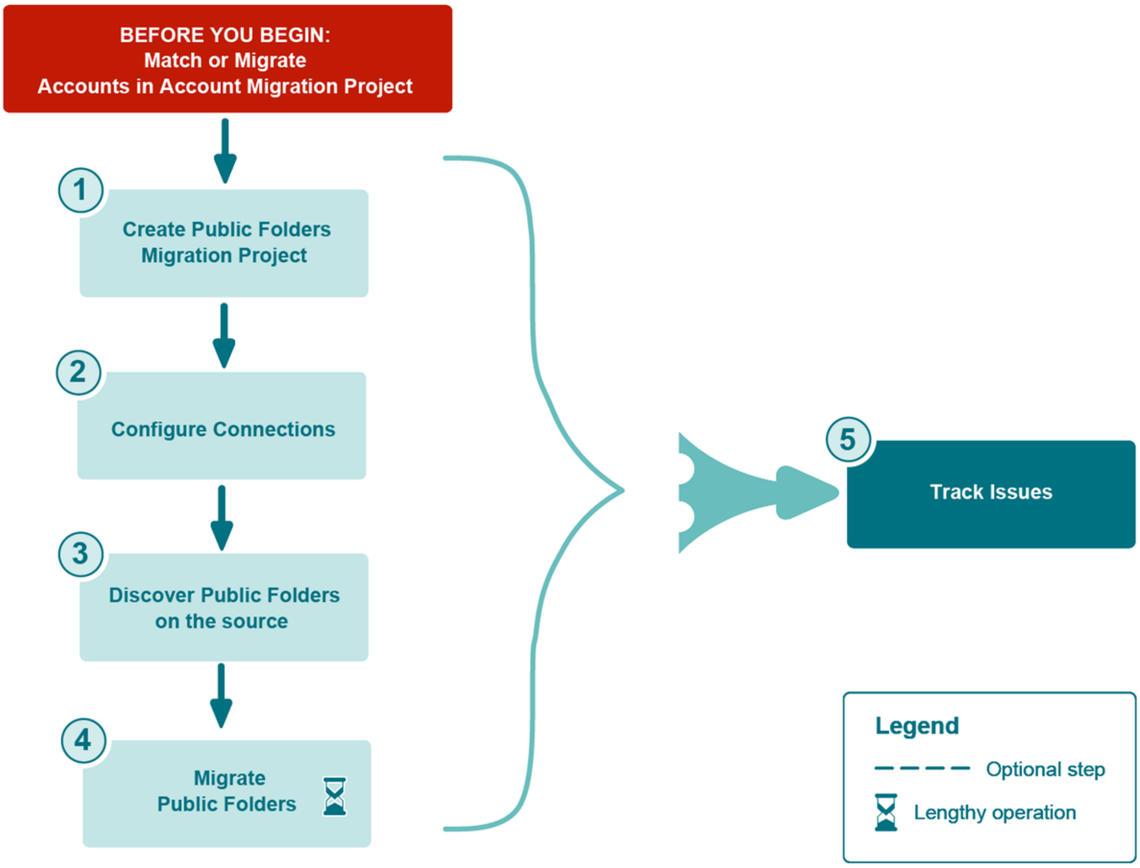
Client Update Agent now supports tenant to tenant migration with domain transfer. In case you are planning to transfer your custom domain from one tenant to another, perform the following procedure:

1. Sign in to the https://admin.microsoft.com using an account with the **Global administrator**role for the directory. Remove your custom domain from the source tenant as described in Microsoft documentation. Wait until removed domain disappears from the domain list on the source.
2. Sign in to the https://admin.microsoft.com using an account with the **Global administrator**role to add the custom domain to the target tenant as described in Microsoft documentation. You must include .com, .net, or any other top-level extension for this to work properly. Wait until added domain appears in the domain list on the target.
3. Add your updated DNS information to the domain registrar
4. After you register your custom domain name, make sure it's valid in Azure AD. The propagation from your domain registrar to Azure AD can be instantaneous or it can take a few days, depending on your domain registrar.
5. Sign in to the https://admin.microsoft.com using an account with the **Global administrator**role to change primary emails of affected users. For more information, see Change a user name and email address.
6. Re-discover accounts including mailboxes to update all information. Now you can see default email addresses for the source tenant in **SourceEmail** column on **Mailboxes**
7. Run matching task for all affected account pairs to update **TargetEmail** column. Clear matching operation is not required. No additional licenses will be consumed.
8. Now you are ready to switch the affected accounts from source to the target. You should provide the custom domain name for forwarding.

In case you are planning to perform Teams migration, this can be done after this scenario is completed. You can use the normal team's migration scenario, no additional steps are required.

Public Folders Migration

Public Folders migration project help you migrating Public Folders from the source tenant to the target tenant. Basic Public Folders migration workflow consists of the following steps:



#	Step
1	Create a migration project
2	Configure connections
3	Discover Public Folders
4	Migrate Public Folders
5	Monitor the progress and track issues

What We Migrate

All types of Public Folders (appointment, contact, journal, mail, note, task, and so on) can be migrated in case they are supported in the target tenant.

Please consider the following migration specifics:

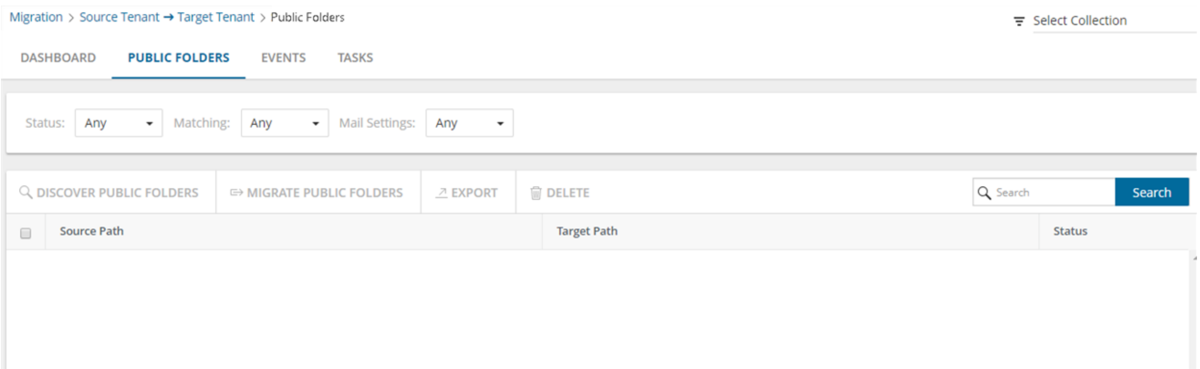
- If the public folder with the same path already exists on the target, the source public folder will not be migrated. Check the **Events** tab.
- The first processed mailbox will be set as a primary for a public folder. Other mailboxes will be set as secondary public folder mailboxes.
- Send As and Send on Behalf properties will only be transferred for mail-enabled Public Folders.
- Read and unread status is not migrated.

Public Folders Migration Dashboard

New Migration UI

- Go to the migration project **Dashboard** in case you use new migration UI.

TIP: Click on you pair of tenants in the breadcrumbs for return to main project Dashboard.



Using this new intuitive interface you can:

- Keep track of your location within project and quickly return to the main project dashboard using breadcrumbs on the top of the pane
- View list of discovered public folders with source and target paths, and last events related to the public folder
- Quickly navigate to the event lists
- Quickly navigate to the tasks list
- Create discovery tasks and public folder migration tasks
- Export feature data into comma-separated file
- Temporarily remove public folders from the migration project
- Search public folder

- Filter public folder by status, by matching state, or by mail settings
- Delete public folder

Prerequisites

Before you start Public Folders migration, make sure that:

- “Migration - Basic” and "Mailbox Migration" consents are granted
- Target Azure AD administrator account has **Owner** permission to the target public folder root.
- It is highly recommended to match / migrate all accounts in the corresponding Migration project to ensure that e folder permissions and account related mail settings will be migrated.

Configuring Connections for Public Folders Migration

Before proceeding with Public Folders migration, check Azure AD administrative credentials for the source and the target tenants and grant consent for the application. You can do this from the **Tenants** page or using the link in **Configure Connections** dialog.

> **IMPORTANT:** Azure AD administrator accounts should have a mailbox with valid Microsoft Exchange Online license

In case you use new Migration UI all necessary connections were configured when you create migration project. You can re-configure connections from the account migration Dashboard, if necessary, as described below.

Configuring connections for source and for target tenants

> **TIP:** Click on you pair of tenants in the breadcrumbs for return to main project Dashboard.

1. Click **Accounts**
2. Click **Configure Connections** on the account migration **Dashboard**.
3. Select **Source** and click **Edit**. Verify source administrator credentials, change them, if necessary, and grant the Required Consents and Permissions to allow the product to access the tenant. You will be redirected to the Microsoft web site for granting admin consent. Note, you should be logged as source administrator account to grant necessary permissions. Click **Save**.

   The following permissions should be granted for the source tenant:

   - Migration - Basic
   - Migration - Mail Migration
4. Select **Target** and click **Edit**. Verify target administrator credentials, change them, if necessary, and grant the Required Consents and Permissions to allow the product to access the tenant. You will be redirected to the Microsoft web site for granting admin consent. Note, you should be logged as target administrator account to grant necessary permissions. Click **Save**.

The following permissions should be granted for the target tenant:

- Migration - Basic
- Migration - Mail Migration

Discovering Public Folders

Before proceeding with the migration, retrieve the list of public folders from the source tenant.

TIP: If you want to re-discover the public folders, simply re-run the existing discovery task.

To create a new discovery task

1. Go to the migration project **Dashboard** in case you use new migration UI. In case you are using classic experience or you are already on the public folder migration Dashboard, go to step 3.
2. Click **Public Folders** widget.
3. Click **Discover Public Folders** on the Dashboard.
4. Schedule when the task will be started. See Task Scheduling for details. Click **Next** to view the task summary.
5. Check scheduled start of the task and name the task. Click **Finish** to save or start the task depending on schedule option selected.

TIP: Give informative names for the tasks. It will greatly simplify the project management and event filtering in the future.

6. Click **Finish**. You can monitor the task status using task widget on project dashboard.
7. Click the task name on the widget to see the details or use **Show all** link.

Once the discovery task is complete, you will see the source domain's public folder summary on the Public Folders Migration Project Dashboard.

CAUTION: Don't start the migration before the discovery task is finished. It might result in incorrect processing of migrated objects.

Removing Public Folders from the Migration Project

You can temporarily remove any source public folders from the migration project, if necessary. Consider, public folders cannot be removed permanently from the migration project, all existing source public folders will be added in after next discovery.

To temporarily remove public folders from the migration project:

1. Go to the migration project **Dashboard** in case you use new migration UI. In case you are using classic experience or you are already on the Public Folders migration Dashboard, go to step 3.
2. Click **Public Folders** widget.

3. Open **Public Folders** and select the items you want to remove from the migration project.
4. Click **Delete**
5. Click **Delete** to confirm the action.

Migrating Public Folders

Make sure that all associated accounts are matched or migrated in account migration project and create the Migration task:

1. Go to the migration project **Dashboard** in case you use new migration UI. In case you are using classic experience or you are already on the public folder migration Dashboard, go to step 3.
2. Click **Public Folders** widget.
3. Open **Public Folders** and select the public folders you want to migrate.

TIP: Use search and filtering to quickly navigate through the list of public folders.

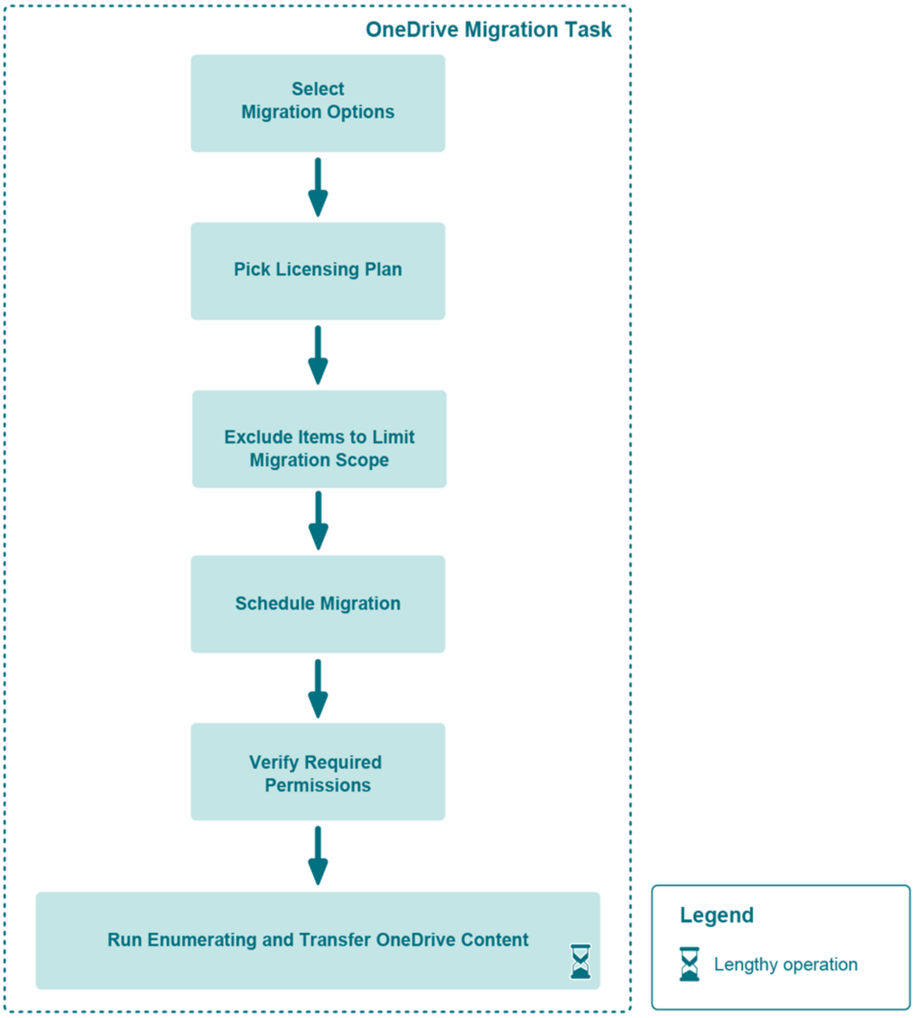
4. Click **Migrate**.
5. Specify whether sub-folders will be migrated.
6. Specify whether public folder content will be migrated. You can clear this option for test migration to create an empty public folder structure and transfer folder permissions.
7. Schedule when the task will be started. See Task Scheduling for details.
8. Click **Next** to view the task summary. Name the task and check selected options. Click **Finish** to save or start the task depending on schedule option selected.

The migration task is created. You can track its progress in the **Tasks**, view the summary on the Dashboard or monitor alerts and notifications in the **Events**.

6

OneDrive Migration

Once the users are matched/migrated, you can transfer the content of their OneDrive for Business stores to the target tenant.



What We Migrate

Quest On Demand migrates the following OneDrive content:

Supported Entity	Supported Entity Properties

Document	• Authorship properties
	  ◦ Created Date
	  ◦ Created by
	  ◦ Last Modified Date
	  ◦ Last Modified By
	• Document properties
	• Document permissions
	• Versions & Version History
	NOTE: Document size can be up to 100 GB.

Folder	• Properties • Folder permissions

Direct Sharing Permissions	• Permissions for:
	  ◦ Internal Users
	  ◦ Groups
	  ◦ Guest(External) Users
	• Custom level permissions

Link Sharing Permissions	Permissions for: • Internal Users • Groups • Guest (External) users

Considerations

Before starting the OneDrive migration consider the following:

- Migrating non-expired permissions from Sharing Links is not supported. Currently migrated permissions are always active whether or not the link has expired.
- Migrating Authors/Editors will only map to the Primary SMTP Address. Multiple SMTP addresses are not currently supported.
- Migrating a OneDrive user Recycle Bin is not supported.

- Migrating Sharing Link permissions for external users requires the external user be an Azure Active Directory guest.
- Unable to migrate a document to a target organization where the document URL will be longer than 400 characters

Prerequisites

- It is highly recommended to match / migrate all accounts in the migration project to ensure that membership, content ownership, and permissions are processed correctly.
- The target tenant should already have the fully configured OneDrive with the valid license plan. Note, that licenses can be automatically assigned to the target users during the migration.
- Admin consents should already be granted for source and target tenants .The following admin consents should be granted for OneDrive migration feature:
  - Migration - Basic,
  - Migration - SharePoint

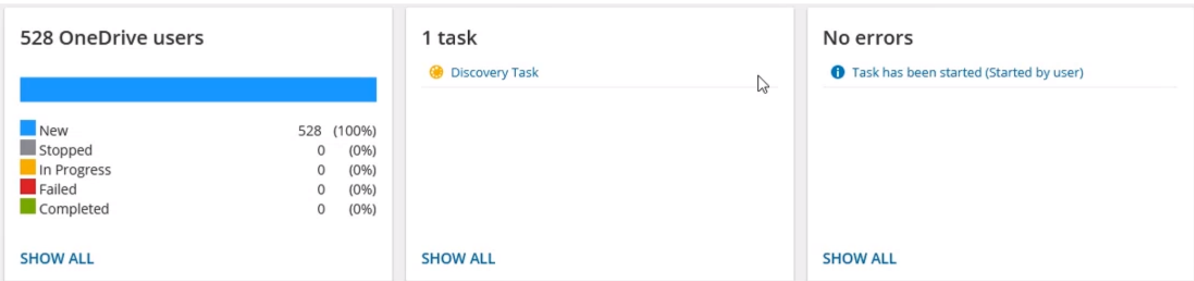
• Azure AD administrator accounts credentials must also be provided for both tenants in the Configure Connections dialog.

In case necessary admin consents are not granted or expired, account discovery will be disabled and you will be unable to continue. To grant admin consents, open the **Tenants** page and grant necessary permissions to allow the product to access the source tenant and the target tenant. You will be redirected to the Microsoft web site for granting admin consent. Once admin consent is granted, you can start discovery.

Dashboard

The On Demand Migration **Dashboard** tab provides summary information about migration tasks and events.

The **OneDrive users** tile indicates the number of OneDrive users and the status of their migration.



Collections

To create a collection of users

1. Begin from the On Demand Migration **Accounts** tab.
2. From the table on this screen, check ☑ the accounts to add to the collection.
3. Click the **New Collection** button.
4. Give the collection a unique name and press **Save**.

To migrate OneDrive accounts for users in a collection

1. Begin from the On Demand Migration **Tasks** tab.
2. Select the collection from the drop down menu in the top right corner labeled **Select Collection**.
3. Select the accounts to migrate from the collection. To check all accounts, select the checkbox in the list header.
4. Click **Migrate OneDrive** and see Migrating OneDrive for more information.

Collecting Statistics

A OneDrive **Collect Statistics Task** conducts an assessment of selected accounts in the source tenant and provides the following information:

- The number of items in the OneDrive for each account and the total number of items across all selected accounts where the assessment was possible.
- The total size of all the items in the OneDrive for each account and the total size of all items across all selected accounts where the assessment was possible.

Each OneDrive Collect Statistics Task generates events. Events are milestones that a task achieves as it runs. For example, when a OneDrive Collect Statistics Task starts, an event is logged and it appears in the list. When the number of accounts that are selected for assessment is large, the OneDrive Collect Statistics Task divides the total number of accounts into manageable sets. Each set is called a batch. When a batch of accounts is assessed, another event occurs.

The OneDrive Collect Statistics Task and its events provide additional information about OneDrive for the set of source tenant accounts that are assessed.

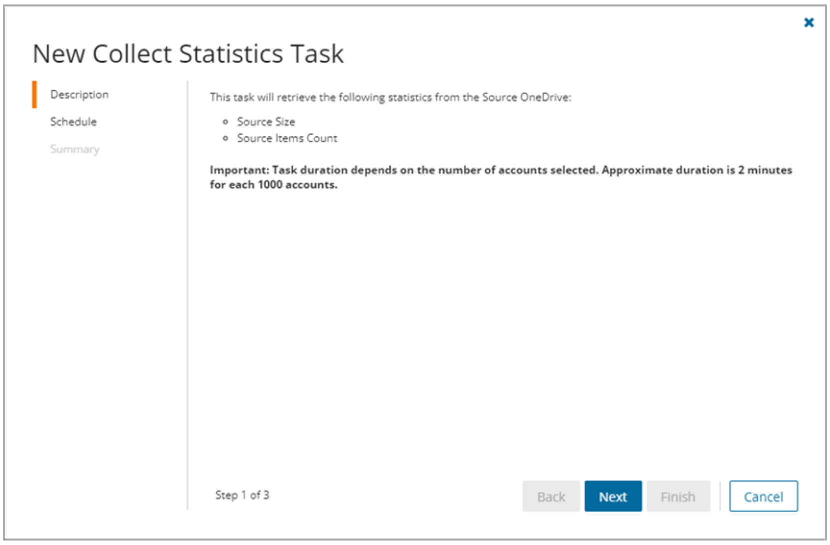
> **NOTE:** Before you proceed, verify that the source tenant accounts have been discovered. For more information see Discovering Accounts

In this topic:

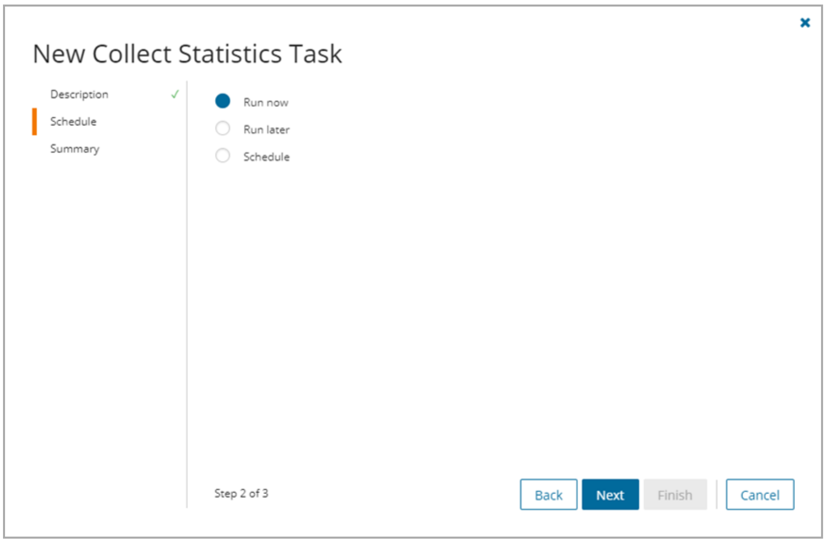
- Create and run a OneDrive Collect Statistics Task
- Review the OneDrive Collect Statistics Task
- Review the events for the OneDrive Collect Statistics Task
- Review the statistics collected

Steps to create a OneDrive Collect Statistics Task

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migration** to open the *My Projects* list.
3. Create a new project or select an existing project.
4. Click **OneDrive** from the project tile. You can also click **Open Project** to open the project dashboard and then click **Open** from the OneDrive tile. The *Accounts and User Data* dashboard opens.
5. Select the **OneDrive** tab and then select **List View** if not already selected.
6. Select the accounts in the list from where you want to collect statistics. You can use search, filtering or collections to quickly navigate through the list of mailboxes. You can select the check box in the table header to select all the accounts.
7. Click **Collect Statistics**from the *Actions* ribbon. The *New Collect Statistics Task* wizard opens.
8. Step 1:**Description**
    a. Read the task description and click **Next**.



9. Step 2:**Schedule**
    a. Choose from one of three options to schedule the task. The scheduler will be activated only after you complete the task wizard.
        - **Run now** - the task will run immediately.
        - **Run later** - the task must be started manually.
        - **Schedule** - specify a future date and time to run the task.



b. Click **Next**.

10. Step **Summary**

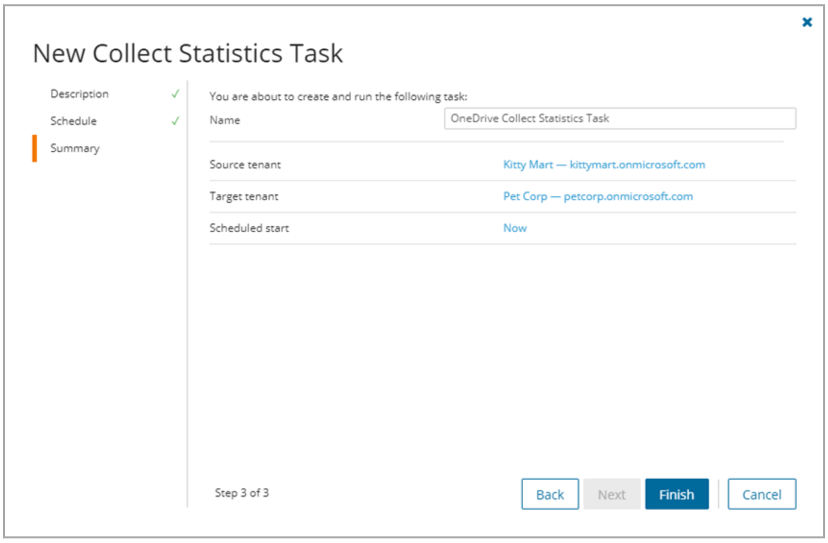
   a. Verify the task specifications as described below:

      i. **Name** - name of the task. You can specify a custom name.

      ii. **Source tenant** - name of the tenant where the statistics will be collected.

      iii. **Target tenant** - name of the target tenant in this project.

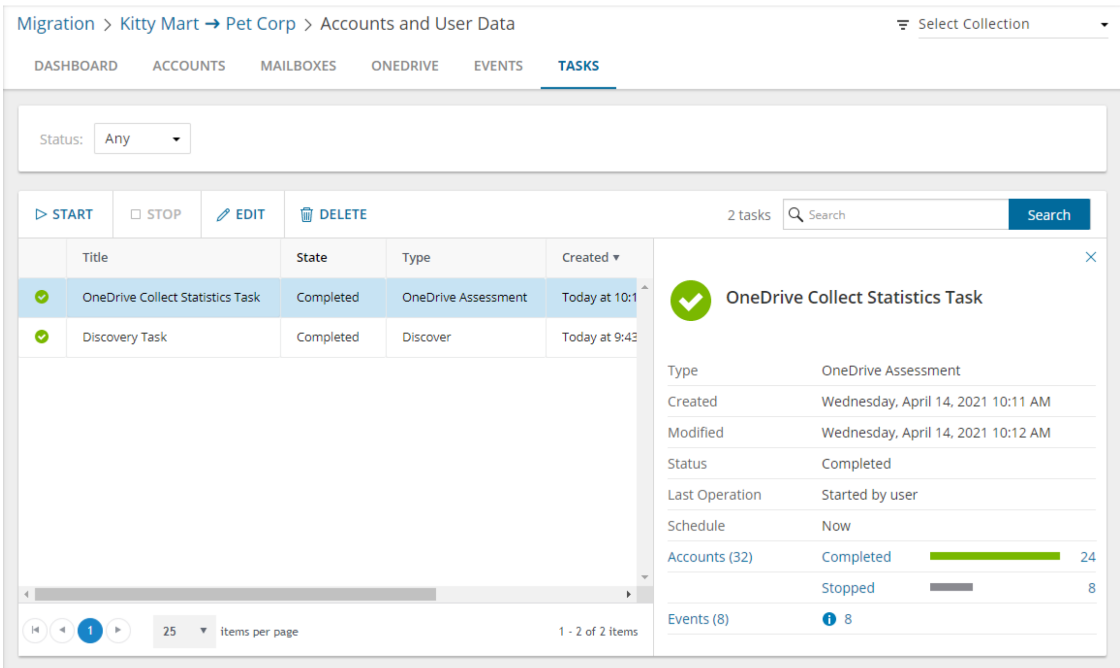
      iv. **Scheduled start** - date and time when the task will start. Now indicates that the task will start immediately.



   b. Click **Back** to revise or review a previous step or click **Finish** to complete the task wizard and start the task as scheduled.

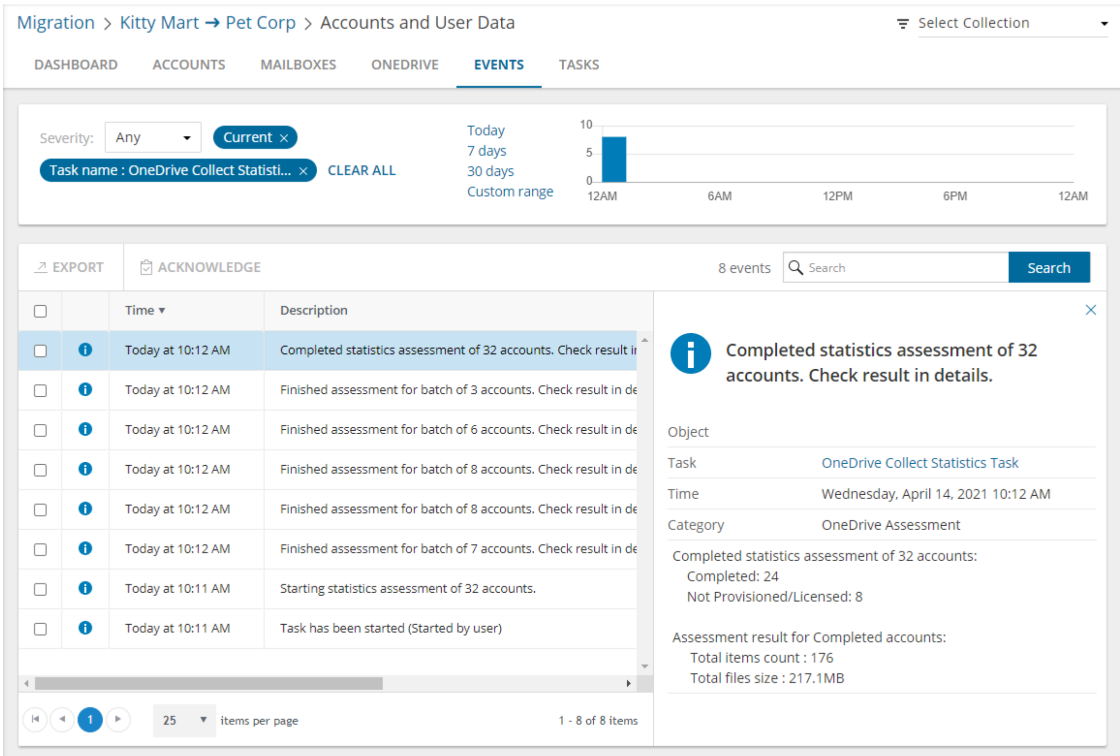
Steps to review the OneDrive Collect Statistics Task

1. Select the **Tasks** tab.
2. Select the OneDrive Collect Statistics Task that you want to review.
3. In the task details pane that opens, the information presented is as described below:
    a. **Type** - Type of the task. The type is `OneDrive Assessment`.
    b. **Created** - Date and time when the task was created.
    c. **Modified** - Date and time when the task was last updated.
    d. **Status** - State of the task.
    e. **Last Operation** - The action that was most recently performed in this task.
    f. **Schedule** - Date and time when the task started. Now indicates that the task started immediately after the task was created.
    g. **Accounts (*number*)** - *number* indicates the count of accounts in the source tenant that are inspected. The values indicate the assessment category of the accounts. The categories are:
        a. **Completed** - Number of accounts where OneDrive is provisioned and the total size and item count was successfully assessed.
        b. **Stopped** - Number of accounts where OneDrive could not be assessed because it is neither licensed nor provisioned.
    h. **Events (*number*)** - The number of events that the task encountered.



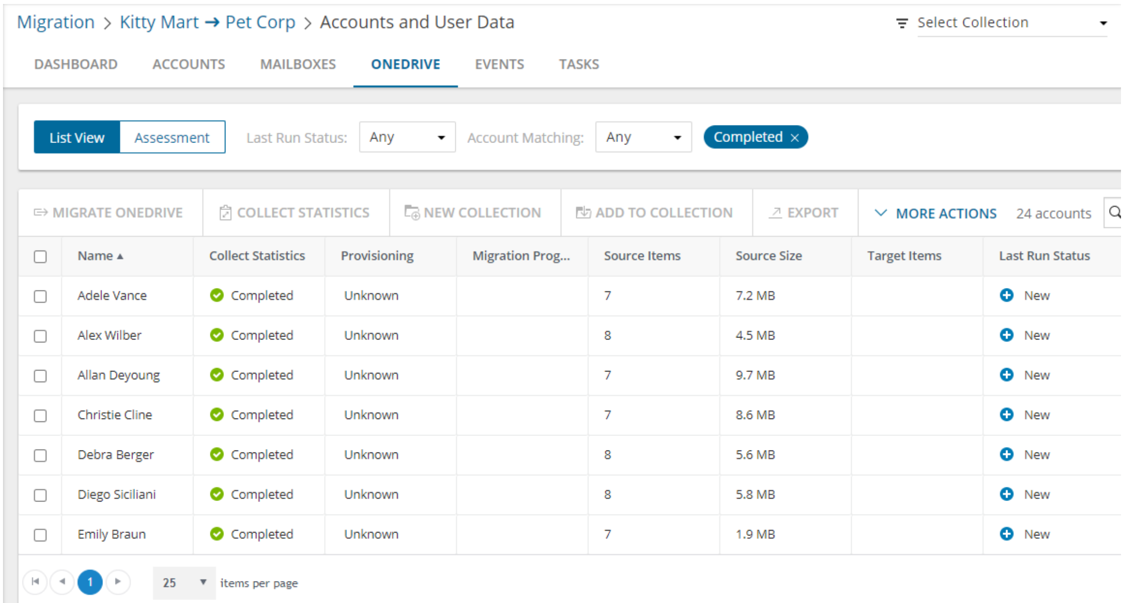
Steps to review the events for the OneDrive Collect Statistics Task

1. Select the **Tasks** tab.
2. Select a task named **OneDrive Collect Statistics Task** that you want to review.
3. In the task details pane that opens, click **Events (***number***)**. The *Events* tab opens with a filtered list of events for the selected task.
4. Select an event that you want to review. In the task details pane that opens, the information presented is as described below:
   a. **Object** - Not applicable for this event.
   b. **Task** - Name of the task.
   c. **Time** - Date and time when the event occurred.
   d. **Category** - Type of task. the value is **OneDrive Assessment**.
   e. **Summary** - a descriptive statement about the event. Notice that the most recent event provides a summary of the assessment across all accounts that could be assessed. The assessment details contain the **Total items count** and the **Total file size**.

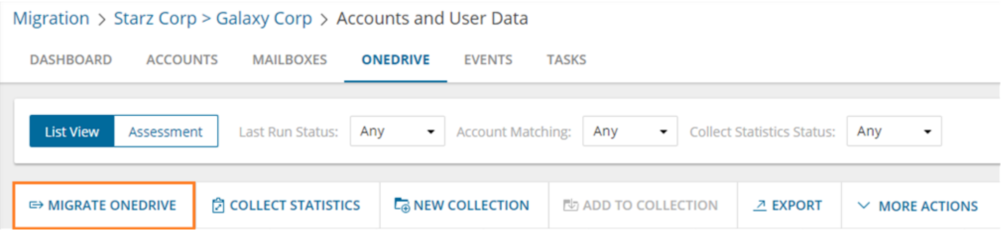


Steps to review the statistics collected

1. Select the **OneDrive** tab and then select **List View** if not already selected.
2. Inspect the results of the task in the table as described below:
    a. **Name** - name of the account in the source tenant.
    b. **Collect Statistics** - the status of the task for the account. A status value that is empty indicates that the account has not yet been assessed. Accounts that were an assessment was attempted will display a status as described below. You can filter the table by selecting one of the following values in the *Collect Statistics Status* filter. Click **Clear All** to reset the filter if necessary.
        - **Completed** - OneDrive is provisioned and the statistics were collected successfully.
        - **Not Licensed/Provisioned** - OneDrive is neither licensed nor provisioned and the statistics could not be collected.
        - **Unavailable** - the named account is not available and the statistics could not be collected.
        - **Not Started** - collection of statistics has yet to be attempted for the named account.
    c. **Source Items** - Number of items in the OneDrive for the account. If there is no value the account has not yet been assessed.
    d. **Source Size**- Total size of all the files in OneDrive for the account. If there is no value the account has not yet been assessed.



Migrating OneDrive

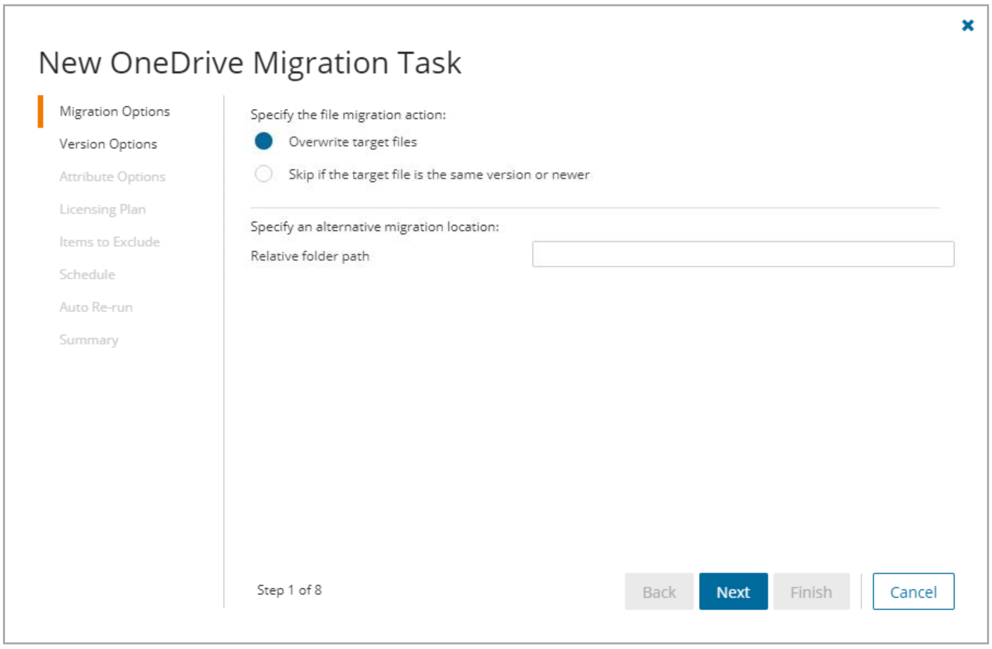


1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migration** to open the *My Projects* list.
3. Create a new project or select an existing project.
4. Click **OneDrive** from the project tiles. You can also click **Open Project** to open the project dashboard and then click **Open** from the OneDrive tile. The *Accounts and User Data* dashboard opens.
5. Open the *OneDrive* tab and verify that the *List View* has displays the list of user Accounts. See Discovering Accountsif the list is empty.
6. Select one or more accounts for which you migrate the OneDrive contents. This enables the **Migrate OneDrive** menu option.
7. Click **Migrate OneDrive** to open the *New OneDrive Migration Task* wizard and follow the steps described below.

New OneDrive Migration Task wizard

The New OneDrive Migration Task wizard helps you configure the migration options and settings for OneDrive for Business. The default settings are optimized for fast migration. You can change the options and settings to address specific migration needs.

Step 1: **Migration Options**



a. Choose a migration action

  a. **Overwrite target files** - Select this option to overwrite the file in the target tenant if they were previously migrated.

  b. **Skip if the target file is the same version or newer** - This is the default selection. When this option is selected, the migration service will not migrate a file if the file already exists on the target tenant and has the same or newer version than the file in the source tenant. Select this option to speed up the migration process especially if you are starting multiple migration tasks.

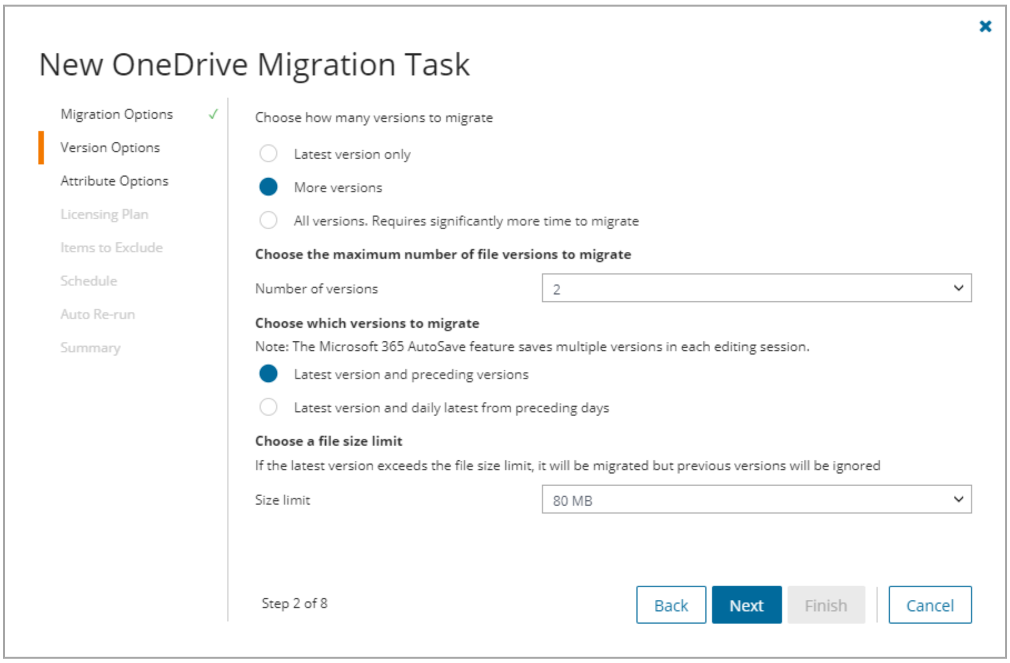
  NOTE: Do not rename a previously migrated file or folder before the migration completes. If you rename a previously migrated file or folder before the migration completes, it may be unexpectedly overwritten even though you select the **Skip if the target file is the same version or newer** option. New files or folders are not impacted.

b. [Optional] Specify a target migration folder

  - **Relative folder path** - specify the relative path to a folder where the OneDrive contents will be migrated.

c. Click **Next**.

Step 2: **Version Options**



a. Specify the scope of file migration

  Each OneDrive file has its own version history and each change to a file is saved with a new version. Select from the following migration options to determine how file versions should be migrated:

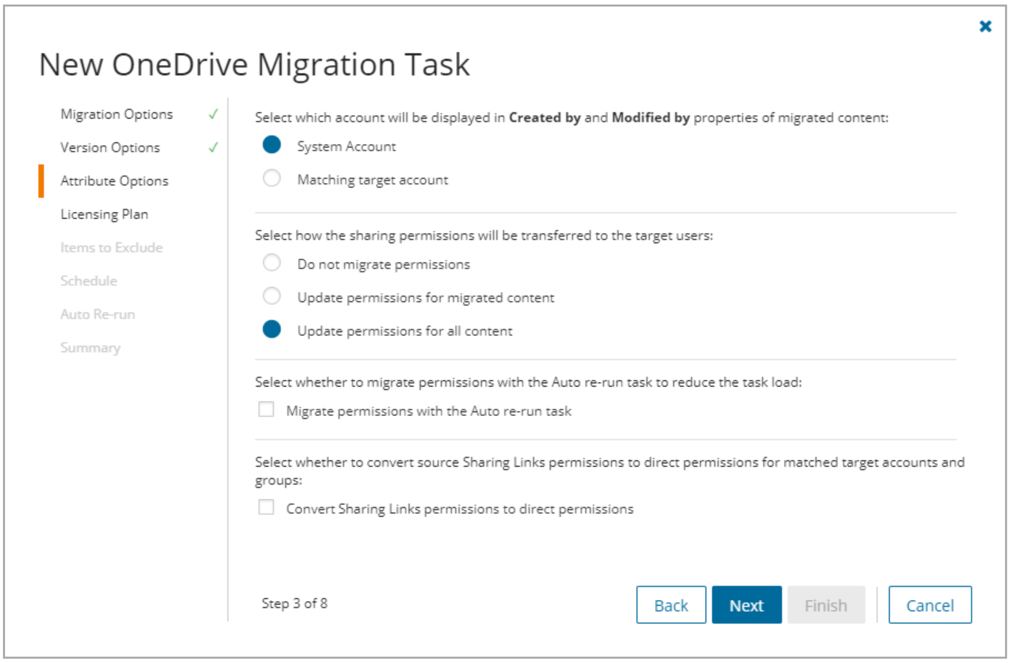
  - **Latest version only** - This is the default selection. The most recent version of the file will be migrated. All other versions will be ignored.
  - **More versions** - Additional versions of a file will be migrated based on the options described below. Large version sets take a significantly long time to migrate.

    - **Number of versions** - the maximum number of version to migrate. The available choices are: 2, 5, 10, 30, 60, 90 and 365. When you specify the number of versions, additional options can be selected.
    - **Latest version and preceding versions** - The version count includes the latest version and the preceding versions in chronological order restricted to the **Size Limit** of the latest version. For example, if you choose to migrate 5 versions, then the most recent version and 4 preceding versions will be migrated as long as the most recent version does not exceed the selected size limit specified.
    - **Latest version and daily latest from preceding days** - The version count includes the latest version and the latest version from each preceding day restricted to the **Size Limit** of the latest version. For example, if there are many versions of a file and you choose to migrate 5 versions, then the most recent version and the latest version from each of the 4 preceding days will be migrated as long as the most recent version does not exceed the selected size limit specified.
    - **Size limit** - This setting is available if the **Latest version and preceding versions** or the **Latest version and daily latest from preceding days**option is selected. By default, the size limit is 80 MB. You can configure the size limitation by selecting from one of the possible values in the drop down. If the size of the latest file version exceeds the selected size limit, the latest version will be migrated and previous versions will be ignored. If the size of the latest file version does not exceed the selected size limit, then the file and its versions will be migrated based on your selection between **Latest version and preceding versions** or **Latest version and daily latest from preceding days**.
  - **All Versions** - The latest version of the file will be migrated, and all previous versions of the file will be migrated if the latest version does not exceed a specified size limit. This option requires significantly more time to migrate all the versions.
    - **Size limit** - This setting is available if the **All Versions** option is selected. By default, the size limit is 80 MB. You can configure the size limitation by selecting from one of the possible values in the drop down. If the size of the latest file version exceeds the selected size limit, the latest version will be migrated and previous versions will be ignored. If the size of the latest file version does not exceed the selected size limit, then the file and its versions will be migrated.

b. Click **Next**.

Step 3: **Attribute Options**

This step determines how file and folder attributes are migrated and managed by the migration service.



a. Account display: Select which account will be displayed in the **Created by** and **Modified by** properties of migrated content:

- **System Account** - This is the default selection. The **Created by** and **Modified by** properties of the migrated file or folder is displayed as *System Account*.
- **Matching target account** - The **Created by** and **Modified by** properties of the migrated file or folder is displayed as the target account that was matched with the source account. If the target account cannot be found, the migration service records a warning event and the properties of the migrated file or folder is displayed as *System Account*.

b. Permission migration: Select how the sharing permissions will be transferred to the target users:

- **Do not migrate permissions** - This is the default selection. Permissions associated with the file being migrated will be ignored.
- **Update permissions for migrated content** - The permissions of files that are migrated will be updated. Some files may be skipped if you selected the **Skip if the target file is the same version or newer** in the previous step.
- **Update permissions for all content** - All file or folder permissions in the target tenant will be updated whether or not they were migrated if the corresponding file or folder is present in the source tenant.

c. Auto re-run: Select whether to migrate permissions with the Auto re-run task to reduce the task load

- **Migrate permissions with the Auto re-run task** - the permissions will be migrated with the Auto re-run task after the migration completes.

d. Permission conversion

- **Convert Sharing Links permissions to direct permissions** - Select this option to convert Sharing

Links permissions of files or folders in the source tenant to direct permissions in the target tenant.

NOTE:

a. Users can access their shared content through the *Shared With Me* view in OneDrive. Some restrictions apply.

b. Some sharing permissions are not converted if the user has shared the file or folder with more than 30 users. Only 30 users will receive direct permissions from the Sharing Links, while others will not be processed due to a Microsoft limitation.

c. If a Sharing Link permission is removed on the source file or folder after it is migrated, the links to this file or folder are still visible in the *Shared with me* and *Shared by me* views in OneDrive, but the file or folder cannot be accessed.

d. Group permissions are not displayed in the Shared with me view because Microsoft currently does not support this functionality.

e. For shared folders, only the top level folder is displayed in the folder tree.

f. For files and folders that do not exist in target tenant before migration the source permission will always be used.

g. For files and folders that exist in the target tenant before a migration, the following example describes how file sharing permissions will be managed. The rules are the same for internal and external users as permission holders, or groups (Office 365 group or security group) as permission holders.

For files

If **Overwrite target files for selected migration** is selected, the source file sharing permission will be used.

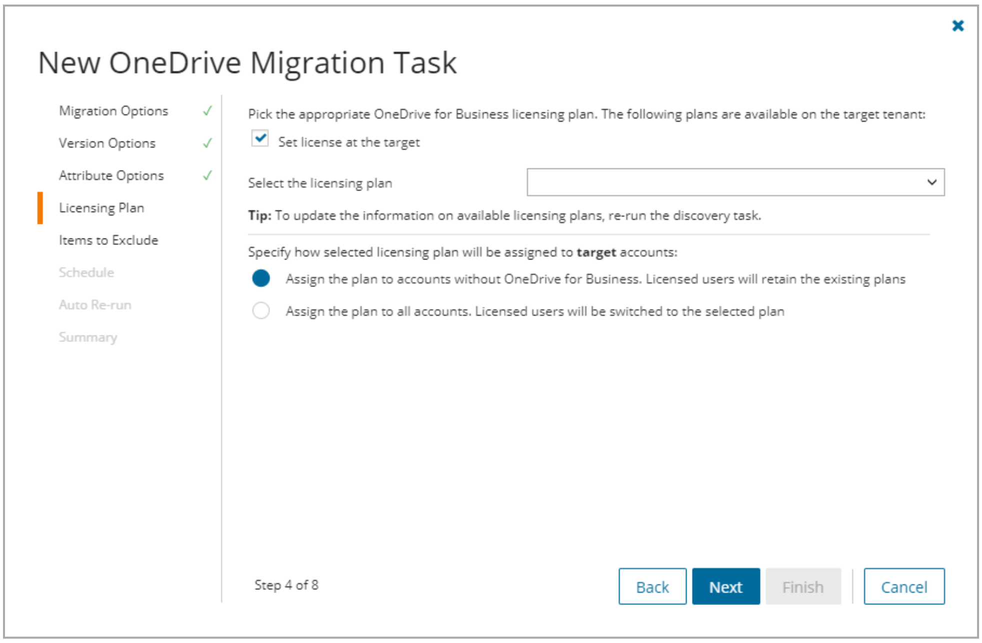
If **Skip if the target file is the same version or newer** is selected, the target file sharing permission will be used.

For folders

If either **Overwrite target files for selected migration** or **Skip if the target file is the same version or newer** option is selected, the target sharing permission will be used as a base. Any addition of permissions in the source will be added onto the target.

e. Click **Next**

Step 4: **Licensing Plan**



a. **Set license at the target** - select this check box to assign a selected license to migrated mailbox accounts in the target tenant. Clear the check box to skip license assignments for migrated mailbox accounts.

b. **Select the licensing plan** - this drop down appears if the **Set license at target** check box is checked. Select the licensing plan from the drop down that you want to assign to migrated mailboxes.

c. Specify how the selected licensing plan will be assigned to the target accounts:

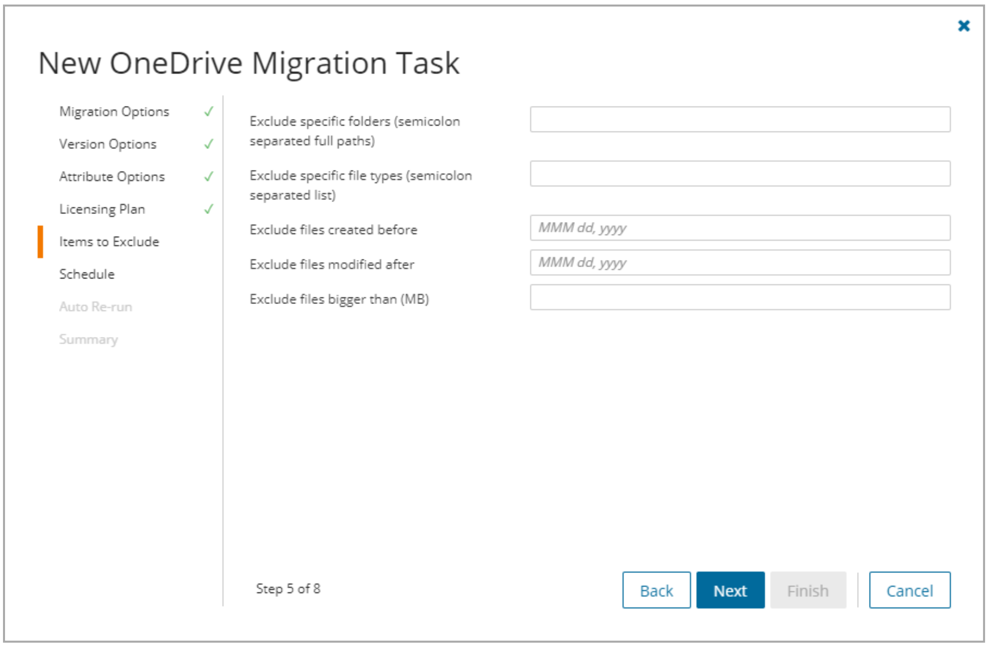
- **Assign the plan to accounts without Exchange Online option. Licensed users will retain the existing plans** - Retain the existing licenses and assign the selected plan only to unlicensed accounts (default). Licensed users will retain the existing plans.
- **Assign the plan to all accounts. Licensed users will be switched to the selected plan** - Replace all license assignments with the licenses from the selected plan. Licensed users will be switched to the selected plan.

NOTE:

- OneDrive for Business that have not been licensed on the source tenant will retain the unlicensed status in the target tenant.
- Selected licensing option is only applicable to OneDrive migration. It does not affect the licensing plans picked for Mail Migration.

d. Click **Next.**

Step 5: **Items to Exclude**



This step is optional.

a. Use the following filters to exclude files and folders from the migration.

Exclude these files	Description
Exclude specific folders...	Provide a semicolon-separated list of fully qualified paths to folders that you want to skip. You can use slash or backslash. If it is convenient for you, use spaces after semicolons, e.g., `filteredfolder; somefolder/subfolder`
Exclude specific file types...	Provide a semicolon-separated list of file extensions. The values are not case sensitive. You can use spaces and dots, e.g., `.exe; dll; BAT`
Exclude files created before	Click in the field to open the date picker and select a date.
Exclude files modified after	Click in the field to open the date picker and select a date.
Exclude files bigger than (MB)	Enter a numeric value. The maximum value is 1000 MB. Only integer values are supported.

b. Click **Next**.

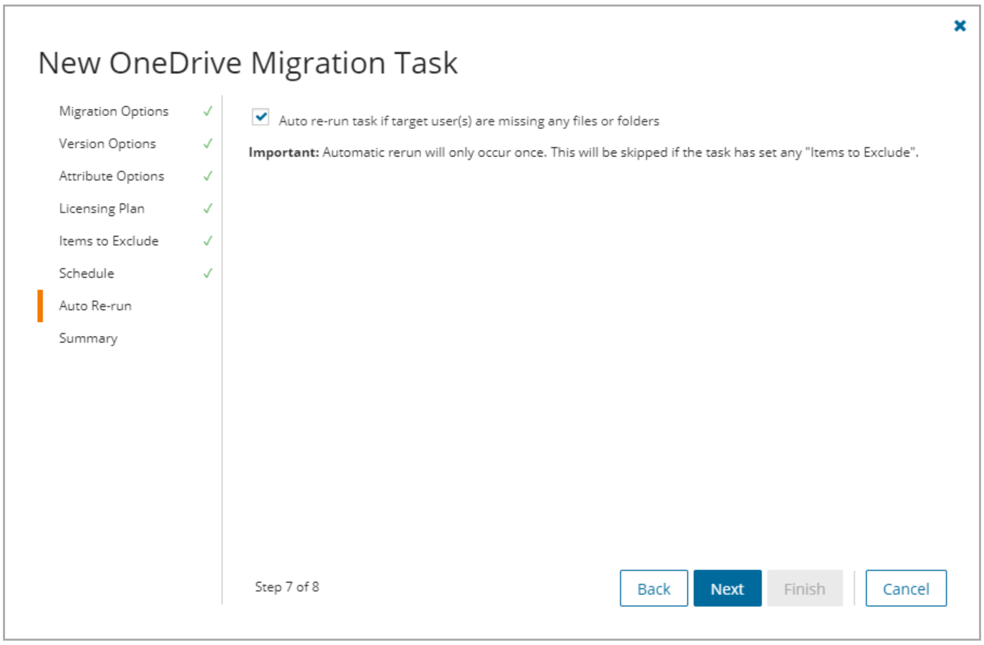
Step 6: **Schedule**

a. Choose from one of three options to schedule the task. The scheduler will be activated only after you complete the task wizard.

- **Run now** - the task will run immediately.
- **Run later** - the task must be started manually.
- **Schedule** - specify a future date and time to run the task.

b. Click **Next**.

Step 7: **Auto Re-run**



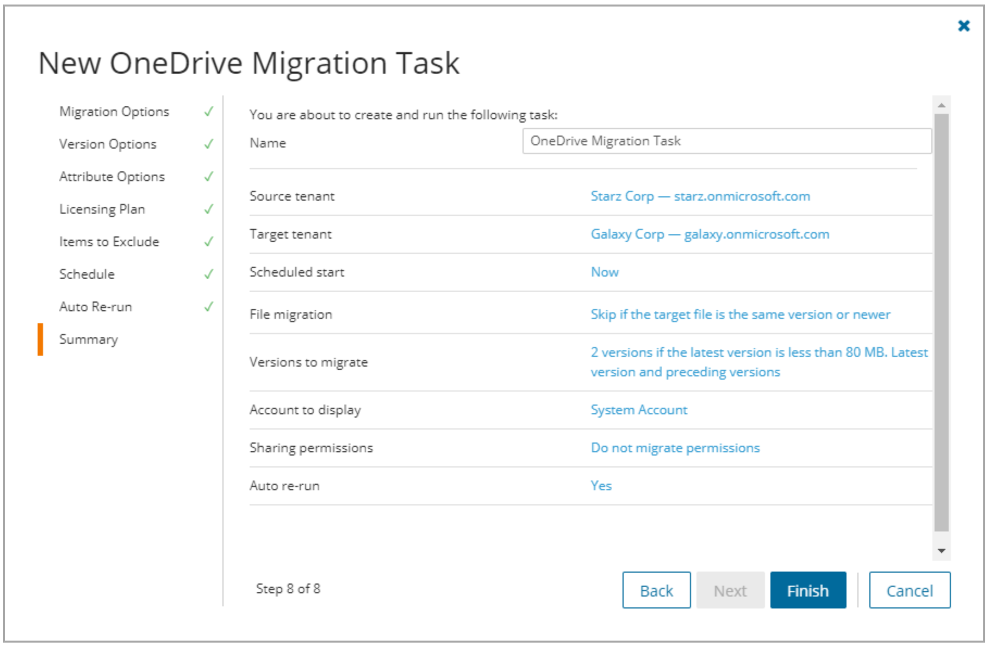
a. **Auto re-run task if target user(s) are missing any files or folders** - This setting is enabled by default. Select this option to re-run the migration task for files or folders that failed to migrate on the first run. The migration task will auto re-run once only. Failure of the files to migrate the first time could be because of intermittent network issues or throttling. We recommend that this setting remains selected.

   This setting is enabled but read-only if the **Migrate permissions in the Auto re-run task** option is selected in Step 2: **Attribute Options**.

   The migration service will issue an event warning for all files that fail to migrate. You can also check the batches for how many files failed to migrate.

b. Click **Next**.

Step 7: **Summary**



This step lists the configured options for this task.

a. [Optional] Specify a name for the task in the **Name** field.

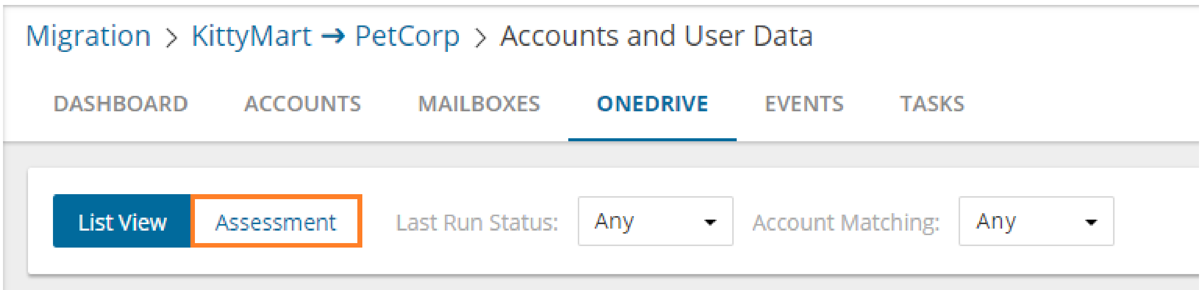
b. Click **Back** to change configurations if necessary or click **Finish** to save and start the task as scheduled.

Assessment: track the progress of the migration task

While the task is running, from the **OneDrive** tab click the **Assessment** button to show summary reports of the migration progress.

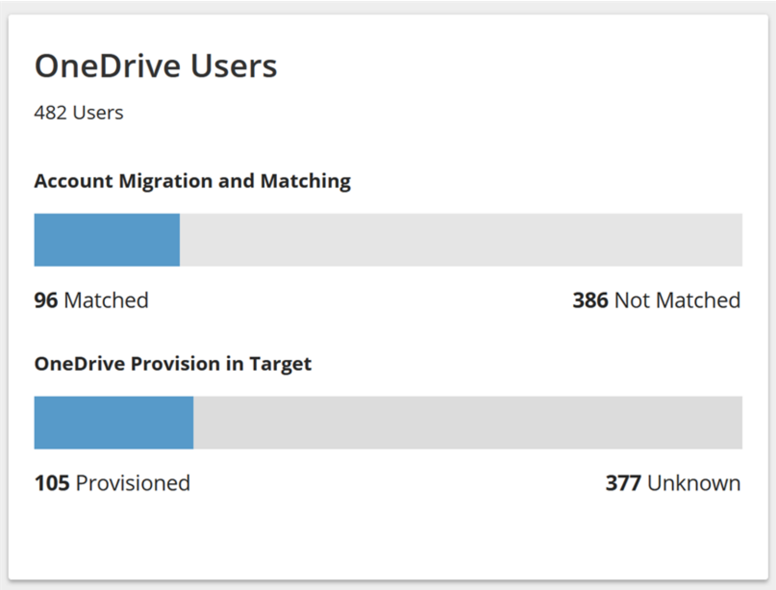
The following summary reports are available.

- OneDrive Users
- Migration Progress is updated in real time.
- Migration Statistics



OneDrive Users

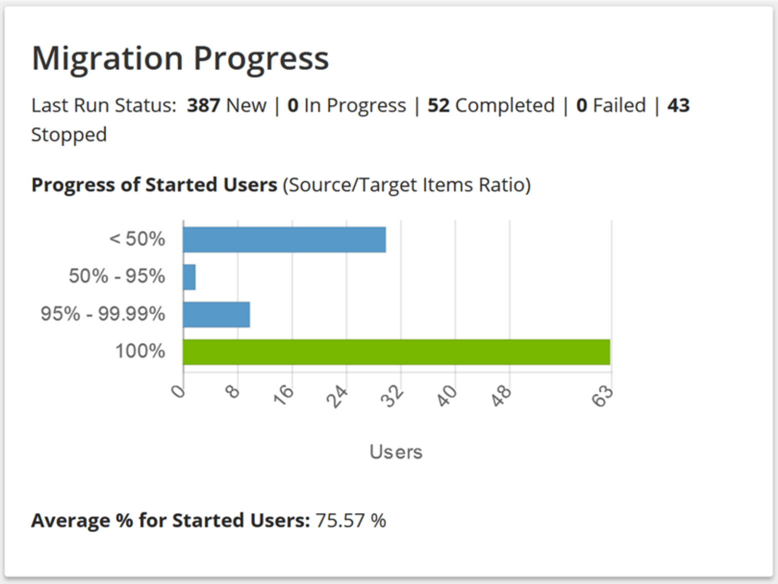
The **Users** figure at the top of the OneDrive users pane reports on the total number of OneDrive users to migrate.
Account migration and matching reports on the number of OneDrive users matched and not matched.
OneDrive provision in target reports on the number of provisioned users.



Migration Progress

The migration progress pane reports on the status of the migration of OneDrive users. It is updated in real time.

Statistic	Description
Last Run Status	This data relates to the **Last Run Status** column on the **List View** tab. Show data from the last run status: new, in progress, completed, failed, stopped.
Progress of Started Users	**Started Users** = The users listed on the **List View** tab with **Migration Progress %** greater than zero. The bar chart shows the **Migration Progress %** for users. It shows how many users have **Migration Progress %** at fewer than 50%, 50% to 95%, 95% to 99%, and 100%. For example, if the diagram shows 63 users at 100% then 63 users have **Migration Progress %** value of 100%. How is **Migration Progress %** calculated? It is calculated as a ratio of the number of target items to the number of source items. If 10 items have migrated to the target and there are 100 items to be migrated on the source then the ratio for that user **Migration Progress %** is 10%.
Average % for started users	This is the average **Migration Progress %** value for users on the **List View**.

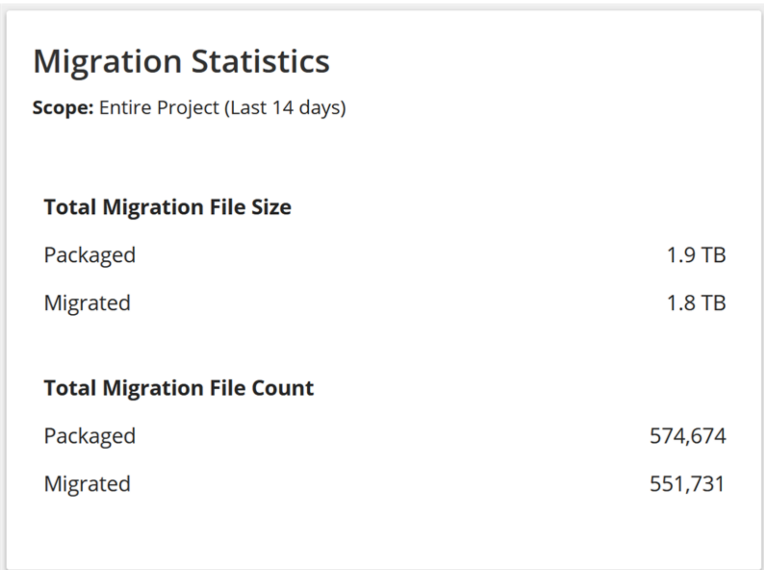


Migration Statistics

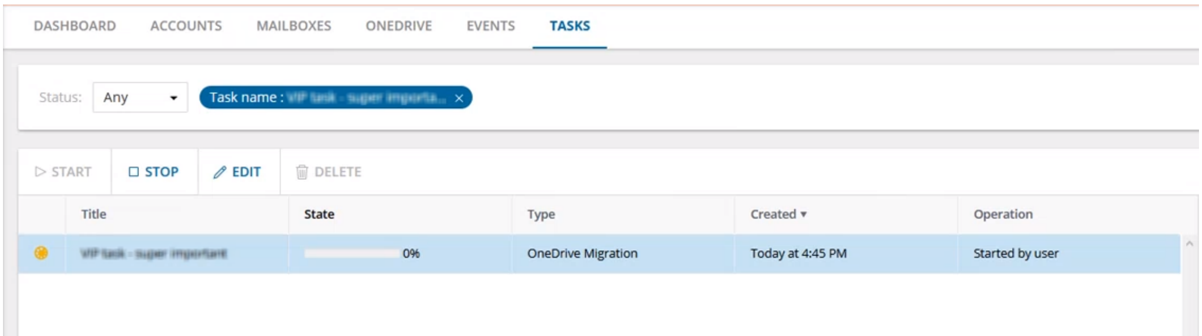
The migration statistics pane reports on statistics recorded for the last 14 days.

- Total migration file size for entire project (last 14 days)
- Total migration file count for entire project (last 14 days)

Dependent on the scope of the file migration the content of OneDrive storage is transferred in batches that can be submitted for processing to OneDrive at the same time to be processed concurrently, it can take a while for OneDrive to complete processing of submitted batches. Refer also to the **Events** tab while the migration task is running.



Stop / Restart the migration task



To stop a running task

1. Begin from the On Demand Migration **Tasks** tab.
2. From the table of tasks, click on the task as it runs. The **Stop** button is now enabled.
3. Click the **Stop** button.
4. A confirmation dialog will appear asking if you wish to stop the task. Click **Stop**

NOTE: The task may take a few minutes to change status.

Restart a stopped migration task

1. Begin from the On Demand Migration **Tasks** tab
2. Select a task where the **State** is "Stopped". The **Start** button is now enabled.
3. Click the **Start** button.
4. A confirmation dialog will appear asking if you wish to restart the task. Click **Start**.

NOTE: The task will restart from the beginning using the same settings.

SharePoint Migration

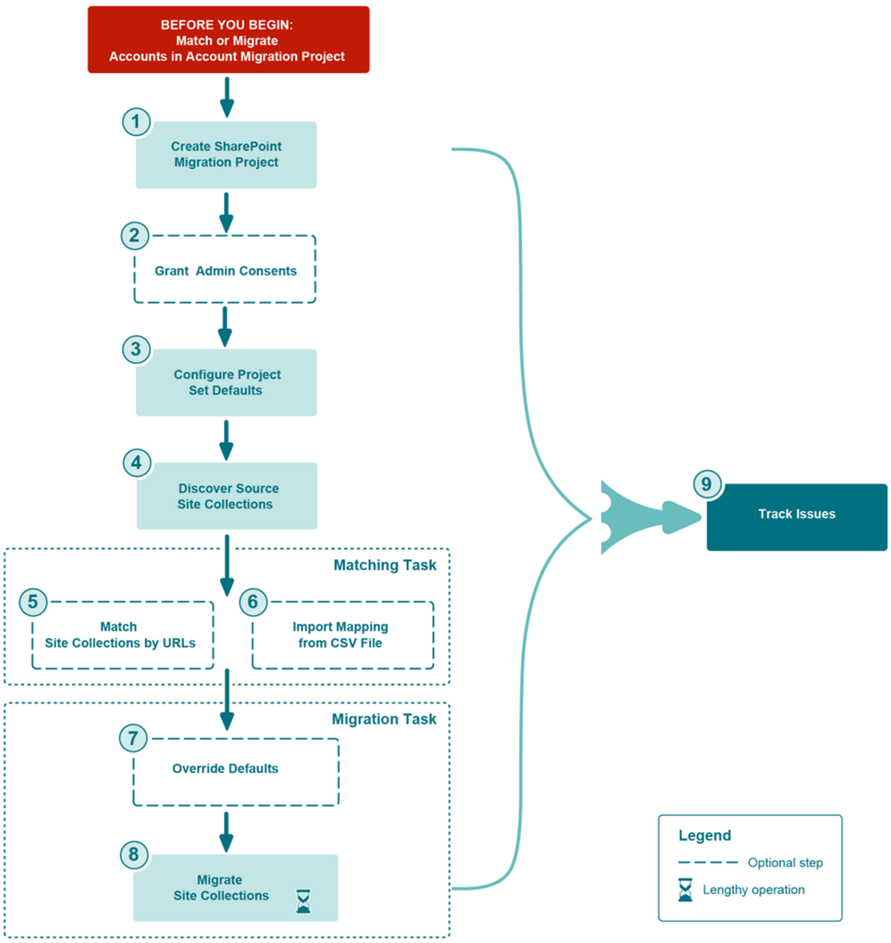
On Demand Migration offers a fast and convenient way to transfer SharePoint content between Office 365 tenants. SharePoint migration functionality requires additional licensing.

IMPORTANT: Before migrating any SharePoint sites, you must ensure all affected accounts exist in the target tenant. In case you use classic product UI, Account Migration project for your source and target tenant should exists. Account matching /migration should be completed.

NOTE: SharePoint migration projects use the concepts and terminology of the Classic experience (site collections.) .

Getting Started widget on SharePoint migration Dashboard with Quick help helps you to prepare, start and perform all steps to migrate your SharePoint sites successfully.

Basic SharePoint migration workflow consists of the following steps:



#	Step
1	Create SharePoint migration project
2	Set the migration defaults (optional)
3	Grant necessary permissions
4	Discover site collections (top-level sites) on the source tenant
5	Match source sites to the existing target sites (optional)
6	Map source sites to custom target sites using a CSV file (optional)
7	Override migration defaults for specific migration tasks (if necessary)
8	Migrate site collections and their content
9	Monitor the progress and track issues

IMPORTANT: Quest recommends performing test and pilot migrations before starting the full-scale migration of the production environment. This helps you better plan the migration project and align the migration tasks with the organization requirements.

CAUTION: Finish the account migration before starting SharePoint migration.

What We Migrate

Quest On Demand migrates the following SharePoint content:

Supported Entity	Supported Entity Properties
Site collections and sites (Modern experience: top-level sites and sub-sites)	• Title, description and logo • Site collection owner • Site collection admins • Hub settings and associations • Site collection feature activation **NOTE:** Active Site Collection on the source will activated on the target during migration but the impact of activating the feature may not be supported on the target. • Site feature activation **NOTE:**Active site feature will be activated on the target during migration but the impact of activating the feature may not be supported on the target. • People and groups • Site permissions • Regional settings • Language settings

Supported Entity	Supported Entity Properties
	• SharePoint Designer settings • Quick launch • Top navigation • Navigation elements • Site columns • Site content types • Web parts gallery • List templates • Themes gallery • Sub-sites • Lists and Libraries • Document ID service feature
Site templates (partially)	Supported site templates **NOTE:** Sites and sub-sites based on unsupported templates are not supported for site collection discovery and migration and will be skipped.
Content types	• Name and description • Advanced settings • Document set settings **NOTE:** The Document set setting to define default content is not currently supported • Column • Column Order
Column types of site, list, and content type	• Single line of text • Multiple lines of text • Choice • Number • Currency • Date and time • Yes/No • Person or group • Hyperlink or picture • Image
List and libraries	• List name, description and navigation • Version settings

<table>
<tr><th>Supported Entity</th><th>Supported Entity Properties</th></tr>
<tr><td></td><td>Version history of list items (optional)
Version history of documents (optional)

NOTE: Version history transfer means a significant increase in migration time.
Advanced settings
Folders
Search
Offline client availability
List experience
List attachments
List item-level permissions
List index non-default views
Library Document Templates
Validation settings
Audience targeting settings
NOTE: Only Classic audience targeting is supported for document libraries.
List permissions
List content types
New content type button order
Default content type
List columns
List views
List alerts
Pages libraries</td></tr>
<tr><td>List templates</td><td>Custom list
Custom list in data sheet view
Document Library
Announcements
Events/Calendar
Contacts
Discussion board
Links
Promoted links</td></tr>
</table>

Supported Entity	Supported Entity Properties
	• Picture library • Issue tracking • Tasks • Tasks with timeline and hierarchy • Wiki page library
Folder	• Properties • Folder permissions

List item	• Authorship properties
	    • Created date
	    • Created by
	    • Last modified data
	    • Last modified by
	• Column data
	• List item permissions
	• Attachments
	• Alerts on list items

Document	• Authorship properties
	    • Created date
	    • Created by
	    • Last modified data
	    • Last modified by
	• Document properties
	• Document permissions
	• Alerts on documents
	• Document ID service feature

Site pages	• Modern site pages • Classic pages
Web Parts	• Modern web parts (Verified modern web parts) • Classic web parts (Verified classic web parts) • Custom web parts **NOTE:**Verified web parts have been tested to ensure all links and references to SharePoint entities are updated during migration as required. Unverified web parts are migrated as is to the target tenant, links and references to other SharePoint entities may remain linked to the entities on the source.

Supported Entity	Supported Entity Properties
SharePoint 2013 Workflow Definitions and Subscriptions	• Migration of work flow definitions is attempted on a best effort basis and it is recommended that you must review the workflow definitions after the migration. • Migration of workflow instances is not supported, and any references to in-progress or completed workflows are not migrated.

Quest On Demand supports **Shared with me** panel functionality on the user's Office portal OneDrive pages for the documents and folders shared using SharePoint.

Modern Web Parts

The following modern web parts are verified:

- Bing Maps
- Button
- Call to action
- Code Snippet
- Countdown Timer
- Divider
- Document library
- Embed
- Events
- File viewer
- Group calendar
- Hero
- Highlighted content
- Image
- Image gallery
- Kindle Instant Preview
- Link
- List
- List properties
- Markdown
- News
- Page Properties
- People
- Quick Chart

- Quick links
- Recent documents
- Site activity
- Sites
- Spacer
- Text
- Twitter
- Weather
- World Clock
- YouTube

All modern web parts not included in this list are unverified and will be copied as is to the target, links and references to other SharePoint entities may remain linked to the entities on the source.

Classic web parts

The following classic web parts are verified (in alphabet order):

- About the community
- Blog Archives
- Blog Notifications
- Blog Tools
- Community Tools
- Content Editor
- Get started with your site
- Image Viewer
- Join Community
- Library
- List
- My Membership
- Page Viewer
- Picture Library Slideshow
- Project Summary
- Site Feed
- Site Users
- What's happening

All classic web parts not included in this list are unverified and will be copied as is to the target, links and references to other SharePoint entities may remain linked to the entities on the source.

Site Templates

The following site templates are supported for site collection discovery and migration:

- Modern Office 365 group site (Group#0). Some limitations are applicable
- Modern team site – no Office 365 group (STS#3)
- Modern communication site (SITEPAGEPUBLISHING#0)
- Classic team site (STS#0, SPSMSITEHOST#0)
- Classic project site (PROJECTSITE#0)
- Community site (COMMUNITY#0)
- Document Center (BDR#0)
- Enterprise Wiki (ENTERWIKI#0). Some limitations are applicable.

Migration of site collections based on other templates is not supported. Sub-sites based on unsupported templates will be skipped.

IMPORTANT:

- The Group or Team site based on the Group#0 must already exist on the target before the migration is allowed to be performed.
- The Group or Team sites cannot be set to be cleared before migration.

Limitations

- Checked out status for files in document libraries is not migrated.
- Currently checked out documents are not migrated. The last checked in version of the document is migrated. If the file has never been checked, no version of the file is migrated.
- Reputation Settings for Community site migration are not supported
- Reporting of offensive content setting for Community sites is not supported
- Private views and personal sites are not migrated.
- Maximum number of items that can be migrated in a single list or library is 1 million
- Classic web parts in classic wiki pages are not migrated. This may affect the home pages of older classic team sites (STS#0) where *the home.aspx* page is built on a Wiki page.
- Assigned translators in Language settings for Communication site are not migrated
- Comments on modern site pages are not migrated
- Migration from an education tenant to another education tenant is not supported for education templates.
- Migration of verified web parts is a best effort. A warning event will be posted for any site pages where an issue occurred while migrating web parts. The warning event will identify the web part and possible cause of the problem. Please review the identified web parts on the site pages and correct as needed.
- The migration of some look and feel settings require that running of custom scripts be allowed on the site. See https://docs.microsoft.com/en-us/sharepoint/allow-or-prevent-custom-script for more information on allowing custom scripts.

- OnDemand Migration for SharePoint migrates the content starting with the root site and then proceeds to any sub-sites. As a result:
  - Links to SharePoint lists, libraries and sub-sites that have not been migrated to the target will not be added to the Quick Launch menu.
  - Navigation links and links in web parts to SharePoint content in sub-sites cannot be updated if the linked sub-site has not been migrated.
- Migration of the Master Page Gallery is not supported because active master pages cannot be updated or overwritten during the migration. Custom master pages should be manually added to the Master Page Gallery in the target tenant and set as the new master page.
- Some Pages library files like *Home.aspx*, *About.aspx* and *PageNotFoundError.aspx*, and the Welcome Page setting cannot be migrated if the sites are built with the following features or templates. You must manually move these files and reconfigure the Welcome page setting if necessary.
  - The SharePoint Server Publishing Infrastructure site collection feature is activated in the source.
  - The site is based on the Wiki site template.

See the Considerations for details on re-migration behavior or if the target site or sub-site exists before the migration is started.

Considerations

Your target tenant might already host SharePoint top-level sites (site collections) or sub-sites created before the migration. See the table below to see the migration action that will be used depending on the existing site properties and the selected migration options.

Target site (sub-site) exists	Source and target default languages match	Clear existing site collection option is selected	Migration action
Yes	Yes	No	Merge, all supported properties will be overwritten using source settings
Yes	Yes	Yes	Create and migrate
Yes	No	Yes/No	Skip and report
No	-	-	Create and migrate

Merging and Re-Migration considerations

- Sub-sites based on unsupported site templates are skipped
- System settings including site columns, content types etc. from the source will overwrite settings that were changed on the target.
- New site structure including list item and docs that only exist on the target remains unchanged.
- If a new list item with the same name is added on both source and target, the source item will be migrated and added as a separate item (i.e. target will have two items with identical names).

- If a new document with the same name is added on both the source and target, the migration of the source item will be skipped, and the warning that the item already exists on the target is reported. Document libraries only allow one document per name.
- For previously migrated list items and docs (same name and ID):
  - Updates on source will be migrated to the target
  - Updates to target will be overwritten by re-migrated source item or document
- System libraries like Site Pages are always cleared before a re-migration. Any new files added only to the target will be deleted from the target as part of the re-migration.

Currently, only the latest versions of documents and list items are migrated. In case of re-migration, please consider the following:

- The migrated document is always replaced, document version remains unchanged.
- The list item is always replaced and list item version remains unchanged, unless **Create a new version each time you edit an item in the list** list versioning setting is enabled. If this setting is enabled, the remigrated list item will be added as new version.

Language considerations

When SharePoint groups in a site are migrated from a source to a target tenant with different default site languages, the group names may not match. In that case, the source groups are migrated to the target tenant with the original names from the source.

For Team sites (sites associated with the Microsoft 365 Groups and Teams) the migration of some members in the default SharePoint group may fail because the reference to the M365 group cannot be matched due to the different languages on the source and target. The resulting warning event is benign because equivalent permissions to the SharePoint group on the source will be created during the Teams or Microsoft 365 group provisioning by the Teams migration service.

SharePoint Migration Dashboard

Using this intuitive interface you can:

- Keep track of your location within project and quickly return to the main project dashboard using breadcrumbs on the top of the pane
- View list of discovered site collection with last information, completed workflows, site collection information, and last events related to the site collection
- Quickly navigate to the event lists
- Quickly navigate to the tasks list
- Create discovery tasks, matching tasks, and site collection migration tasks
- Export feature data into comma-separated file and use this file for manual mapping
- Temporarily remove sites from migration project
- Search site collection
- Filter site collection by workflow, or by matching state
- Delete site collection

Prerequisites

- It is highly recommended to match / migrate all accounts in the corresponding Migration project to ensure that membership and content ownership are processed correctly.
- The target tenant should already have the fully configured SharePoint with the active license plan. Note, that licenses are not automatically assigned to the target users during the migration.
- **Consents already get granted for source and target tenants**.
  The following admin consents should be granted for SharePoint migration feature:
  - Migration - Basic,
  - Migration - SharePoint

In case necessary admin consents are not granted or expired, discovery will be disabled and the following notification will be displayed: **Grant admin consent to the Migration module on the Tenants page for both source and target tenants: Basic and SharePoint**. To grant admin consents open **Tenants** page and grant the Required Consents and Permissions to allow the product to access the source tenant and the target tenant. You will be redirected to the Microsoft web site for granting admin consent. Once admin consent is granted, you can start discovering site collections.

Configuring the Migration Project

You must set a default site owner that will be used if the actual owner (user account) is not found in the target. See the details on user mapping below.

CAUTION: If both the actual owner account and the default owner are not found in the target, the migration task will fail.

1. Go to the migration project **Dashboard** in case you use new migration UI.
2. Click **SharePoint** widget.
3. Click **Configure Project** on the project dashboard.
4. In the **Edit Project** dialog, provide the user from the target tenant and click **Save**.

You can set a different default owner for a group of sites by overriding this setting in the migration task.

User Mapping Workflow

During the migration, On Demand Migration gets the accounts associated with the migrated (source) site and then looks up their pairs in the target tenant. Depending on the results, one of the following actions is performed:

- If a matched target user is found, On Demand Migration sets it as an owner of the migrated site.
- If a matched user is not found on target, On Demand Migration switches the site owner to the default account.
- If the actual owner account has no match on the target and the default owner is missing, the migration task fails.

This table describes how ownership is handled by On Demand Migration depending on the SharePoint entity:

SharePoint Entity	Matched owner found	Matched owner missing	Matched owner and default user missing
Top-level sites (site collection)	Target account matched with source owner	Default target user	Migration Task fails
Sub sites	System account	System account	
Lists	System account	System account	
Folders	Target account matched with source owner	Default target user	
Files	Target account matched with source owner	Default target user	
List Items	Target account matched with source owner	Default target user	

Setting Custom SharePoint Admin Center URLs

On Demand Migration builds the expected SharePoint Admin Center URL based on SharePoint's default naming convention. If a customer has custom SharePoint Admin Center URLs, these URLs should be set manually as described below:

1. Click **Configure Project** on the SharePoint migration dashboard.
2. In the **Edit Project** dialog, change default source or target SharePoint Admin Center URLs to the custom ones and click **Save**.

> **NOTE:** On Demand Migration does not validate SharePoint Admin Center URLs. These URLs are a subject of special request to Microsoft. Do not change the default URL if the custom one is not yet approved by Microsoft.

Discovering Site Collections

The On Demand Migration for SharePoint service must have a reference list of all the site collections and sites that can be migrated to the target tenant. There are two ways to discover the list of sites in the source tenant:

- Discovering site collections automatically
- Discovering site collections manually

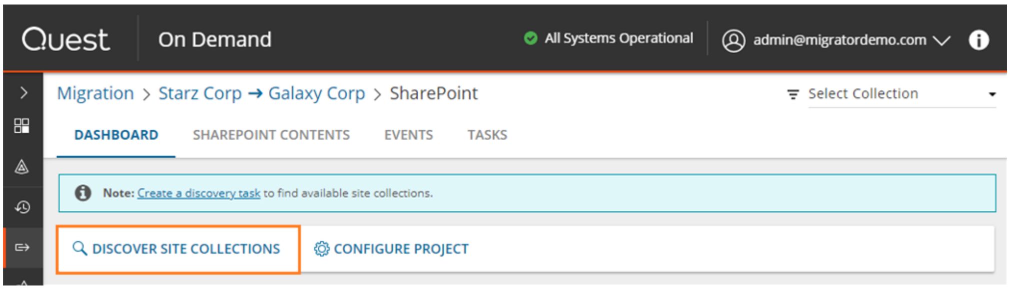
> **NOTE:** Before you begin, ensure the you have migrated all the accounts to the target tenant. At the minimum, ensure that all SharePoint users are migrated. For more information see Account Migration.

Discovering site collections automatically

This is the simplest approach which uses the Discovery Task to inspect the source tenant and discover all the sites.

To discover SharePoint sites automatically:

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migration** to open the *My Projects* list.
3. Create a new project or select an existing project.
4. Click **SharePoint**. The *Dashboard* opens.
5. Click **Discover Site Collections** from the *Dashboard* ribbon. The *New Discovery Task* wizard opens.



6. Step 1: **Discovery Options**
   a. Select **Discover all supported site collections**.
   b. Click **Next**.
7. Step 2: **Schedule**
   a. Choose from one of three options to schedule the task. The scheduler will be activated after you complete the task wizard.
      - **Run now** - the task will run immediately.
      - **Run later** - the task must be started manually.
      - **Schedule** - specify a future date and time to run the task.
   b. Click **Next**.
8. Step 3: **Summary**
   a. Verify the task specifications as described below:
      i. **Name** - name of the task. You can specify a custom name.
      ii. **Source tenant** - name of the tenant where the site discovery occurs.
      iii. **Scheduled start** - date and time when the task will start. Now indicates that the task will start immediately.
   b. Click **Back** to revise or review a previous step or click **Finish** to complete the task wizard and start the task as scheduled.
9. When the task completes, the *SharePoint Contents* list is updated. The object state of each site is set to **Discovered**.

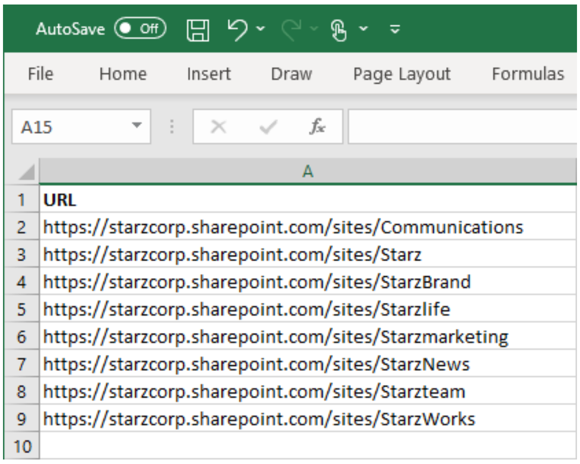
Discovering site collections manually

When you want to migrate a few sites, you can run the discovery process by using a CSV file. The file contains the site URLs and restricts the discovery of sites to the list of URLs provided in the CSV file.

- The column header can be either **URL**, **URI** or **SourceURL**. It is case insensitive.
- The CSV file could contain more columns. The extra columns are ignored. If there are multiple columns with the headers URL, URI or SourceURL, all the columns will be processed.
- The URL could be either a relative URL or a URL with a fully qualified domain name. For the root site (e.g. https://starzcorp.sharepoint.com) use "/" as the relative URL.
- The specified URL can be in upper, lower or mixed case. Case is ignored during discovery.

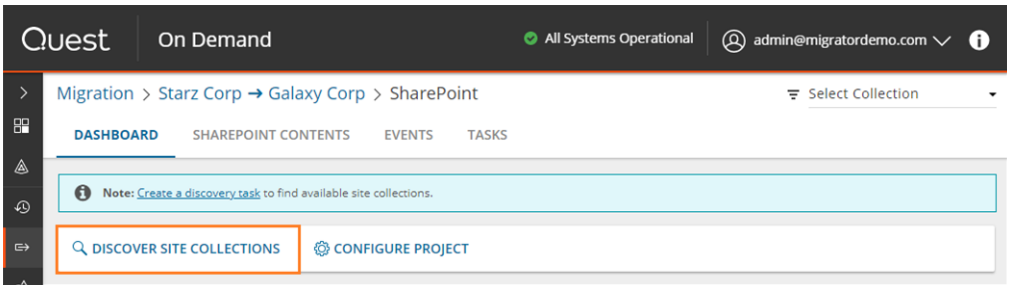
You can create the CSV file in two ways:

1. Download the CSV file from the *SharePoint Admin Center*
    a. Log in to the *SharePoint Admin Center* of the source tenant.
    b. From the navigation pane, click **Active sites**.
    c. From the *Active sites* page menu, click **Export** to download the CSV file.
    d. Edit the CSV file to list only the sites in the **URL** column that should be discovered. You can either delete the other columns to maintain a cleaner list.
2. Create a new CSV file
    a. Enter the column header as **URL**, **URI** or **SourceURL**. It is case insensitive.
    b. Enter the URLs in the subsequent rows manually.



To discover SharePoint sites manually:

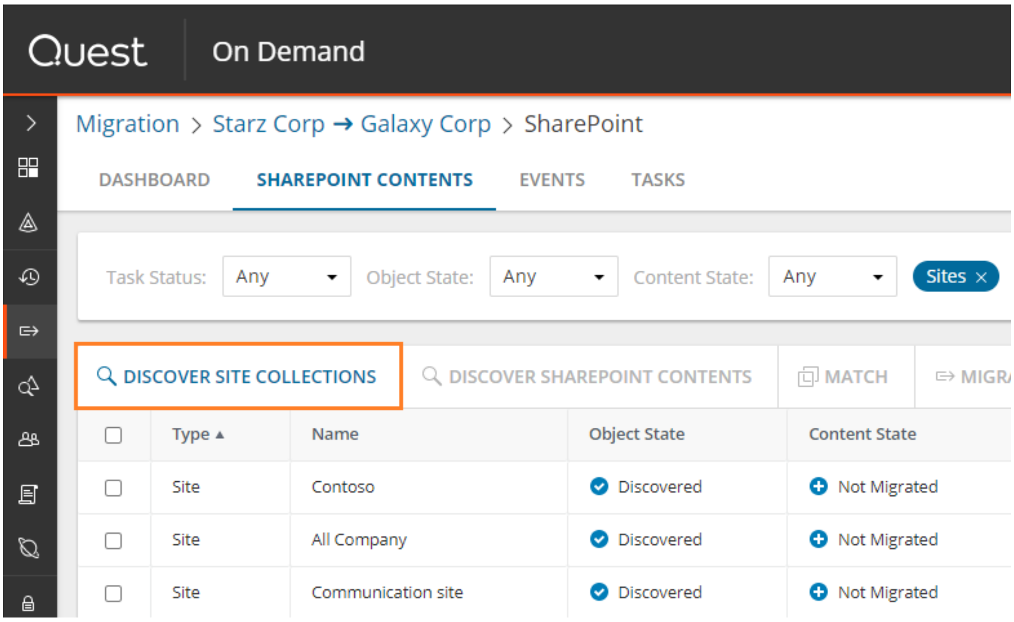
1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migration** to open the *My Projects* list.
3. Create a new project or select an existing project.
4. Click **SharePoint**. The *Dashboard* opens.
5. You can start the *New Discovery Task* in one of the following ways:
    a. Click **Discover Site Collections** from the *Dashboard* ribbon. The *New Discovery Task* wizard opens.



-or-

a. If you discovered sites previously, you can click **SharePoint Contents** from the *Dashboard* ribbon to open the *SharePoint Contents* list page.

b. Click **Discover Site Collections** from the *Actions* ribbon. The *New Discovery Task* wizard opens.



6. Step 1: **Discovery Options**

   a. Select **Discover selected site collections from file**.

   b. Click **Browse** and locate the CSV file that contains the site collections to be discovered.

   c. Click **Open** in the File Explorer window to load the file into the wizard

   d. Click **Next**.

7. Step 2: **Schedule**

   a. Choose from one of three options to schedule the task. The scheduler will be activated after you complete the task wizard.

      - **Run now** - the task will run immediately.
      - **Run later** - the task must be started manually.
      - **Schedule** - specify a future date and time to run the task.

   b. Click **Next**.

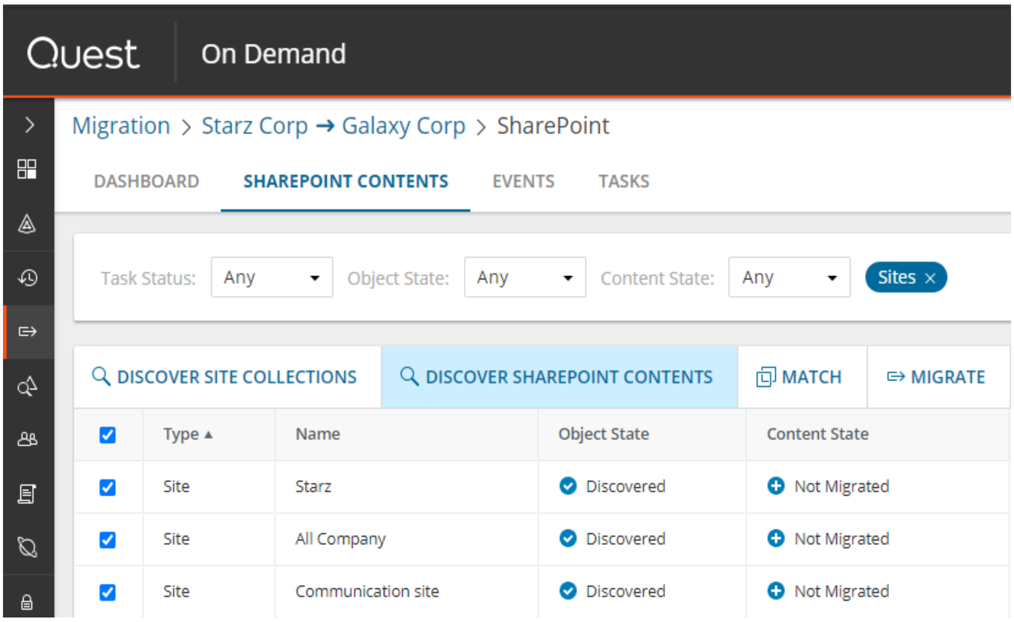
8. Step 3: **Summary**
   a. Verify the task specifications as described below:
      i. **Name** - name of the task. You can specify a custom name.
      ii. **Source tenant** - name of the tenant where the statistics will be collected.
      iii. **Scheduled start** - date and time when the task will start. **Now** indicates that the task will start immediately.
   b. Click **Back** to revise or review a previous step or click **Finish** to complete the task wizard and start the task as scheduled.
9. When the task completes, the *SharePoint Contents* list is updated. The object state of each site is set to **Discovered**.

Discovering Site Contents

Discovering the site structure and content provides a better understand of the scope of the migration. The SharePoint contents list displays the following SharePoint object types: Site (site collection), Web (root site), Lists, Webs (sub sites, child sites). The display will include the number of lists and the number of items in each list.

To discover SharePoint site contents

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migration** to open the *My Projects* list.
3. Create a new project or select an existing project.
4. Click **SharePoint**. The *Dashboard* opens.
5. Click **SharePoint Contents** from the *Dashboard* ribbon to open the *SharePoint Contents* list page.
6. Choose one or more sites by selecting the respective check box for the site. You can select the check box in the column header to select all sites.

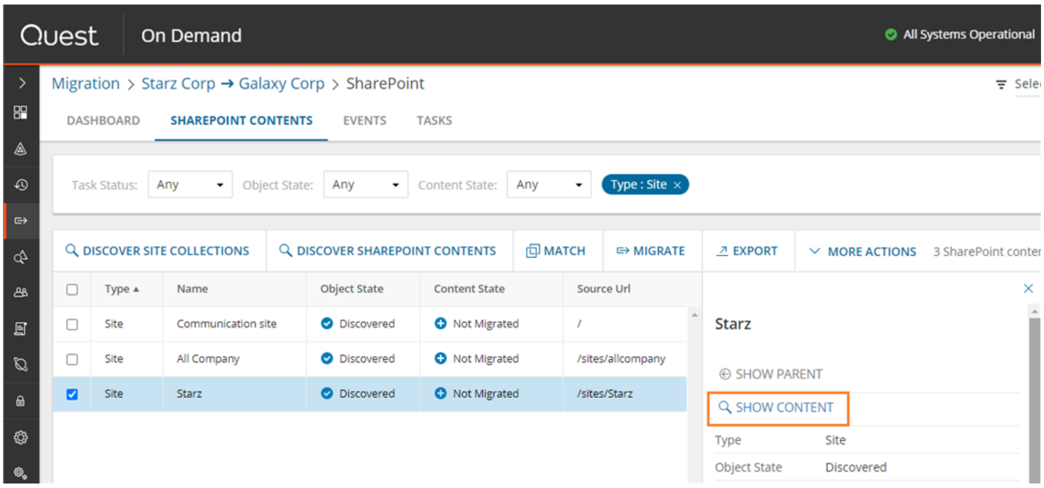


7. Click **Discover SharePoint Contents** from the *Actions* ribbon. The *New DiscoveryTask* wizard opens.
8. Step 1: **Schedule**
   a. Choose from one of three options to schedule the task. The scheduler will be activated after you complete the task wizard.
      - **Run now** - the task will run immediately.
      - **Run later** - the task must be started manually.
      - **Schedule** - specify a future date and time to run the task.
   b. Click **Next**.
9. Step 2: **Summary**
   a. Verify the task specifications as described below:
      i. **Name** - name of the task. You can specify a custom name.
      ii. **Source tenant** - name of the tenant where the statistics will be collected.
      iii. **Scheduled start** - date and time when the task will start. **Now** indicates that the task will start immediately.
   b. Click **Back** to revise or review a previous step or click **Finish** to complete the task wizard and start the task as scheduled.

To view SharePoint contents:

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migration** to open the *My Projects* list.
3. Create a new project or select an existing project.
4. Click **SharePoint**. The *Dashboard* opens.
5. Click **SharePoint Contents** from the *Dashboard* ribbon to open the *SharePoint Contents* list page.

6. To view the contents for a specific site:
    a. Clear any filters in the *Filter* panel
    b. Set the **Type** filter to **Site** from the drop down. The list of sites and site collections are displayed.
    c. Select a site by clicking the corresponding check box. The site details panel opens.
    d. Click **Show Content**. The site contents are displayed in the list.



7. To view the contents for a specific content type:
    a. Clear any filters in the Filter panel
    b. Set the **Type** filter to a content type from the drop down. The list of content types are displayed.

Matching and Mapping Site Collections

When site collection discovery is completed and before you migrate the site collections and descendant objects to the target tenant, the OnDemand Migration for SharePoint service must know where to migrate the site collections. There are two ways you can provide the reference:

- Matching site collections automatically
- Mapping site collections manually

See the Considerations for details about migration behavior if the target site collection or sub-site exists before the migration is started.

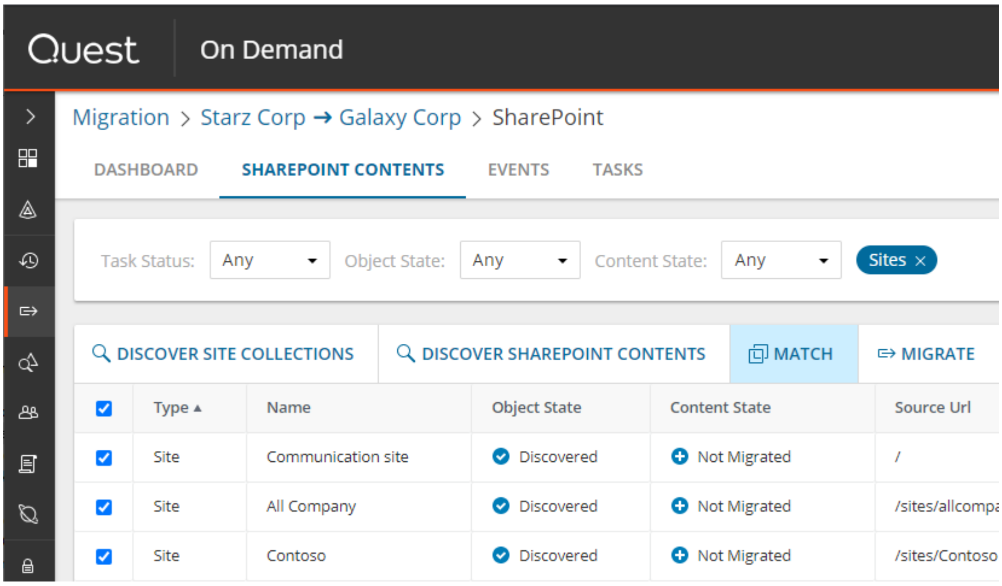
Matching Site Collections

To ensure that no data is lost or duplicated, match the source site collections with the corresponding target site collections using the Matching Task.

To match site collections automatically:

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migration** to open the *My Projects* list.
3. Create a new project or select an existing project.

4. Click **SharePoint**. The *Dashboard* opens.
5. Click **SharePoint Contents** from the *Dashboard* ribbon to open the *SharePoint Contents* list page.
6. Choose one or more site collections by selecting the respective check box for the site collection. You can select the check box in the column header to select all site collections.



7. Click **Match** from the *Actions* ribbon. The *New Matching Task* wizard opens.
8. Step 1: **Schedule**
   a. Choose from one of three options to schedule the task. The scheduler will be activated after you complete the task wizard.
      - **Run now** - the task will run immediately.
      - **Run later** - the task must be started manually.
      - **Schedule** - specify a future date and time to run the task.

   b. Select the **Include site structure** check box to allow sub-sites and other descendant structures to be matched.
   c. Click **Next**.
9. Step 2: **Summary**
   a. Verify the task specifications as described below:
      i. **Name** - name of the task. You can specify a custom name.
      ii. **Source tenant** - name of the tenant where the source URLs exist.
      iii. **Target tenant** - name of the tenant where the source URLs may or may not exist.
      iv. **Scheduled start** - date and time when the task will start. Now indicates that the task will start immediately.
      v. **Include site structure** - option to match sub-sites and other descendant structures.

   b. Click **Back** to revise or review a previous step or click **Finish** to complete the task wizard and start the task as scheduled.

10. You can track the progress in the *Tasks* tab, monitor alerts and notifications in the *Events* tab and view the summary on the *Dashboard*.
11. When the task completes, the *SharePoint Contents* list is updated. Compare the *Source Url*column with the *Target Url* column for the selected sites. The object state of each matched site is set to **Matched**.

Mapping Site Collections

To change the name of a migrated site collection or relocate the root site, use a CSV file to set up a custom map. URLs in a mapping file are case sensitive and must be relative URLs. There are three ways to prepare a CSV site mapping file.

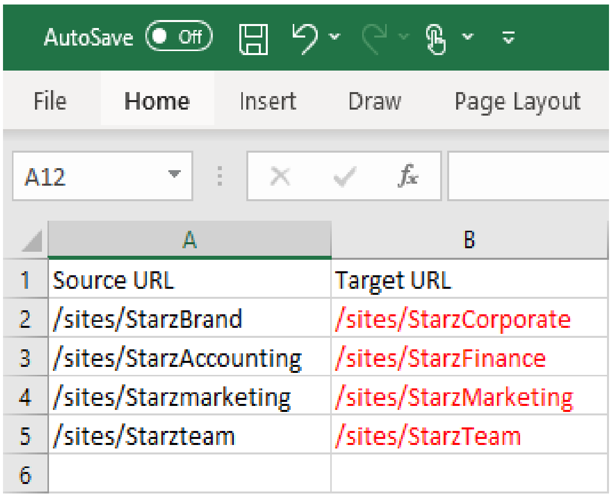
NOTE: Site collections cannot be merged or reorganized with a mapping file.

1. Download the CSV file from the *SharePoint Admin Center*
   a. Log in to the *SharePoint Admin Center* of the source tenant.
   b. From the navigation pane, click **Active sites**.
   c. From the *Active sites* page menu, click **Export** to download the CSV file.
   d. In the CSV file, delete all columns before the URL column. Rename the URL column header to either **SourceURL** or **Source URL**. This must be the first column.
   e. In the **Source URL** column keep only the sites that you want to map. Ensure that only relative URLs are used.
   f. Insert a blank column as the second column and specify the header as either **TargetURL** or **Target URL**. This must be the second column.
   g. Specify the corresponding target URLs. Ensure that only relative URLs are used.
2. Download the CSV file from the *SharePoint Contents* page
   a. Choose one or more sites by selecting the respective check box for the site. You can select the check box in the column header to select all sites.
   b. Click **Export** from the *Actions* ribbon.
   c. Extract the CSV file from the downloaded ZIP file.
   d. In the CSV file, delete all columns before the **Source URL** column. This must be the first column.
   e. Insert a blank column as the second column and specify the header as either **TargetURL** or **Target URL**. This must be the second column.
   f. Specify the corresponding target URLs. Ensure that only relative URLs are used.
3. Create a new CSV file and specify the column header in the first row and then enter the URLs in the subsequent rows manually. Since URLs in a mapping file are case sensitive, this method must be used with caution.
   a. In the first column, specify the header as either **SourceURL** or **Source URL**.
   b. In the second column, specify the header as either **TargetURL** or **Target URL**.
   c. Enter the source and target URLs manually in the subsequent rows . Ensure that only relative URLs are used.

NOTE: You need to map only the URLs that will change in the target Tenant.

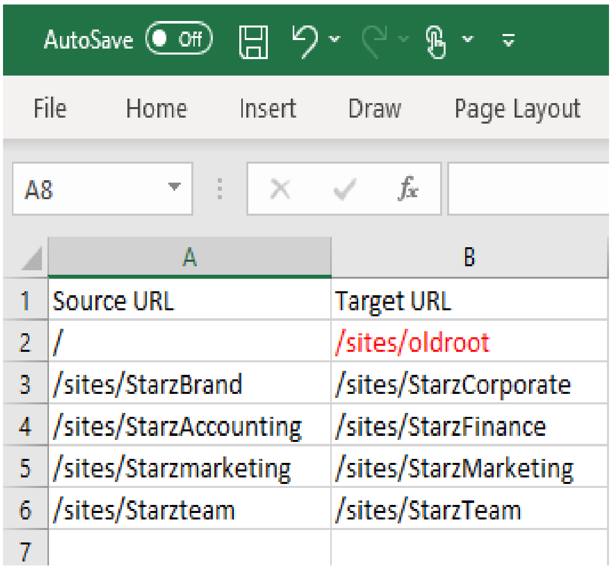
Example 1 - The Target URL is used to rename a site collection from the source tenant.

- The URL `/sites/StarzBrand` has been renamed to `/sites/StarzCorporate`.
- The URL `/sites/StarzAccounting` has been renamed to `/sites/StarzFinance`.
- The URL `/sites/Starzmarketing` has been renamed to `/sites/StarzMarketing`.
- The URL `/sites/Starzteam` has been renamed to `/sites/StarzTeam`.



	A	B
1	Source URL	Target URL
2	/sites/StarzBrand	/sites/StarzCorporate
3	/sites/StarzAccounting	/sites/StarzFinance
4	/sites/Starzmarketing	/sites/StarzMarketing
5	/sites/Starzteam	/sites/StarzTeam
6		

Example 2 - The target URL is used to relocate the root site.
The root URL is relocated to a managed site in the target tenant called `/sites/oldroot`.



	A	B
1	Source URL	Target URL
2	/	/sites/oldroot
3	/sites/StarzBrand	/sites/StarzCorporate
4	/sites/StarzAccounting	/sites/StarzFinance
5	/sites/Starzmarketing	/sites/StarzMarketing
6	/sites/Starzteam	/sites/StarzTeam
7		

To map site collections with a CSV file:

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migration** to open the *My Projects* list.
3. Create a new project or select an existing project.
4. Click **SharePoint**. The *Dashboard* opens.
5. Click **SharePoint Contents** from the *Dashboard* ribbon to open the *SharePoint Contents* list page.

6. Click **More Actions** from the *Actions* ribbon and then click **Map from File**. The *New Mapping from File Task* wizard opens.
7. Step 1: **Mapping File**
   a. Click **Browse** and locate the CSV mapping file.
   b. Click **Open** in the File Explorer window to load the file into the wizard
   c. Click **Next**.
8. Step 2: **Schedule**
   a. Choose from one of three options to schedule the task. The scheduler will be activated after you complete the task wizard.
      - **Run now** - the task will run immediately.
      - **Run later** - the task must be started manually.
      - **Schedule** - specify a future date and time to run the task.
   b. Click **Next**.
9. Step 3: **Summary**
   a. Verify the task specifications as described below:
      i. **Name** - name of the task. You can specify a custom name.
      ii. **Source tenant** - name of the tenant where the source URLs exist.
      iii. **Target tenant** - name of the tenant where the target URLs may or may not exist.
      iv. **Scheduled start** - date and time when the task will start. Now indicates that the task will start immediately.
   b. Click **Back** to revise or review a previous step or click **Finish** to complete the task wizard and start the task as scheduled.
10. You can track the progress in the *Tasks* tab, monitor alerts and notifications in the *Events* tab and view the summary on the *Dashboard*.
11. When the task completes, the *SharePoint Contents* list is updated. Compare the *Source Url*column with the *Target Url* column for the selected sites. The object state of each matched site is set to **Matched**.

Migrating Site Collections

Use the **SharePoint contents** tab to migrate SharePoint objects (sites, lists, web, members). You can migrate an entire site or initiate granular or incremental migration. You can navigate through SharePoint site objects and identify any site objects that failed to migrate.

In this topic:

- About object and content states
- Starting a migration
- Reviewing migration results
- Incremental migration

About object and content states

Use the **Object state** and **Content state** properties in the **SharePoint Contents** list page to determine the state of any SharePoint object in the migration process.

Object state

Use the object state property to track the object itself. When the object is added to On Demand its status is **discovered**. When discovered you can trigger a migration: Starting a Migration.

State	Description
Discovered	On Demand has discovered the object at the source.
Matched	On Demand has matched a site on the source URL with a corresponding site on the target URL.
Provisioned	On Demand has created (updated) the SharePoint object (site, web, list, users and groups) on the target without warnings or errors. You are now ready to track the **content state.**
Provisioned with issues	On Demand has created (updated) the object with warnings or errors. See Issues: warnings and errors.

Content state

Use the On Demand content state property to track the progress of migrating the SharePoint object's content. Note that the content state value is transient (may change) while the task status is in progress.

State	Description
Not Migrated	On Demand has not migrated the content. This is the default content state when the object state is **Discovered**.
Migrating	On Demand is migrating the object content.
Migrated	On Demand has successfully migrated the content to the target without warning or errors. If the object is a list then all the list items have migrated successfully. If the object is a SharePoint site or web (root site) then all the child lists and webs have migrated successfully.
Partially Migrated	While a migration task is in progress, partially migrated can be a transitory state showing at least one child is migrating or not migrated. Once the migration task is complete, partially migrated indicates that not all children of the object migrated: at least one child migrated and at least one child did not migrate.
Migrated with Issues	On Demand has migrated the content to the target with warnings or errors. See Issues: warnings and errors.

The transient nature of the object and content states during migration

When migrating a site the web and list **task status** will be set to **complete** when the web or list object state is set to **provisioned**. This is expected behavior in the current implementation. It indicates that the sub task to provision the object is complete. The **Content State** will not go to **migrated** until the child content is migrated

When migrating a site or web, the **content state** may be set to **migrated** and then reset to **partially migrated**. This will typically happen for a site that had not had the SharePoint content discovery run before migration is started. In this case the migration is discovering content to migrate as it goes along. The **content state** is set to **migrating** when the migration completes what it has discovered so far, then it looks for more and resets to **partially migrating**, repeating until all content is discovered and migrated. It discovers lists in a web in groups (not all at once) and then it discovers any sub sites after the lists are done.

Starting a Migration

Any discovered SharePoint object (object state = discovered) can be migrated including sites, lists (including individual lists) and webs (root and child webs). All children of the object selected for migration will be migrated.

CAUTION: Don't start the migration before the discovery task (Discovering Site Collections) is finished. It might result in incorrect processing of migrated objects.

To start a SharePoint migration

From the **SharePoint contents** tab

1. Locate the SharePoint object.
2. Check ☑ the object. You can check multiple objects to migrate multiple objects.
3. Click **MIGRATE** to open the New Migration Task wizard.

NOTES:

- When migrating multiple SharePoint sites, it is best practice to add no more than 10 sites to a migration task to avoid creating a large load that may trigger throttling in the Microsoft export interfaces.
- Creating and running multiple migration tasks at the same time may create a large load that may trigger throttling in the Microsoft export interfaces.
- If the parent of the object selected for migration does not already exist on the target then migration will be skipped.
- Migration of a site or web will do a full migration of all child lists (not incremental) and discovery of any new child web or list.

New Migration Task wizard

From the **Version Options** tab you can select to

- Migrate the most recent version only
- Migrate the two most recent versions
- Migrate more versions (with options)

When **migrate more versions (with options)** is selected, additional options are made visible. Migrating documents with multiple versions will significantly increase the time needed for migration. These options are intended to provide a balance between the need to maintain historical data with the practicalities of migrating large amounts of data. Keep this in mind when making your selection.

- **Limit version migration based on document size:** The default setting for the version migration document size limit is 80 MB. The larger the selected size limit, the longer the migration will take. For each file, if the most recent version of the file exceeds the size limit then only the most recent version of that file is migrated. If the most recent version of the file is smaller then the size limit then versions of the file are migrated according to the following specifications, irrespective of each version's file size .
- **And limit number of versions migrated from each day (does not override document size limit)** Days are measured in UTC time. If migrating one version from each day is sufficient then select to migrate the most recent version from each day. Otherwise, select to migrate the 5 most recent versions from each day

for versions created in the last 30 days, then migrate the most recent version from each earlier day. Note the next constraint on the maximum number of versions of the file to be migrated.

- **And limit number of versions migrated for each document (does not override document size limit)** The number of versions of each file On Demand will migrate will not exceed the maximum number of versions to be migrated listed here.

Review migration results

The migration task is complete and an **object state** is **provisioned with issues** or a **content state** is **migrated with issues**. Locate these objects in the SharePoint hierarchy.

Review using the SharePoint Content view

Once the migration task is complete, locate objects where the **object state** is **provisioned with issues** or the **content state** is **migrated with issues** using the SharePoint content view.

From the **SharePoint contents** tab

- Select the object so the row is highlighted and the details pane opens to the right of the screen.
- From the details pane click **Show Contents**
- Continue following the webs into the site structure until you see
  - an object where the Object State is Provisioned with Issues
  - a list where the Content State is Migrated with Issues
- From the details pane click **SHOW PARENT** to return upward through the hierarchy.

Review using Flat View and Filtering

Once the migration task is complete, locate objects where the **object state** is **provisioned with issues** or the **content state** is **migrated with issues** using a flat view of the objects and filtering.

To see all SharePoint objects in the table in a flat view

- Remove the **Site** filter.

To filter the table to see all Share Point objects with issues with provisioning

- Set the Object State filter to **Provisioned with Issues**.

TIP: You can filter further by setting a filter on the object **Type**.

To filter the table to see objects with issues with the migration

- Set the Object State filter to **Migrated with Issues**.

TIP: You can filter further by setting a filter on the object **Type**. The smallest object type where migration issues will be found is **List**.

Issues: warnings and errors

To see the warnings and errors for a given object

From the **SharePoint contents** tab

1. Highlight the object to see the details pane on the right.
2. From the details pane click **Events**.

Repair using granular migration of a site, lists, web, SharePoint members

From the **SharePoint contents** tab

1. Locate objects with object state provisioned with issues or content state migrated with issues. See Review migration results.
2. Check ☑ these objects.
3. Click **Migrate**. See also Starting a Migration.

List objects: warnings and errors

If a list object content state is migrated with issues then the most likely reason is the number of list items is fewer on the target than on the source.

To see the number of list items on the source

From the **SharePoint contents** tab

1. Highlight the list object to see the details pane on the right.
2. The details pane provides a count of the number of the list items for this list on the source.

Repair using granular migration

From the **SharePoint contents** tab

1. Locate the list objects that did not migrate.
2. Check ☑ these objects.
3. Click **Migrate**. See also Starting a Migration.

Incremental migration of lists

The On Demand Migration for SharePoint service can migrate new and updated list items in previously migrated lists with the content state **migrated**.

> **NOTE:** Incremental migration of system libraries like Site Pages is not supported. These libraries are always fully re-migrated.

To trigger an incremental migration of a SharePoint list:

1. Open the **SharePoint contents** tab and locate the SharePoint list. There are a couple ways to do this:
    a. Add a filter to show only objects of type list.
    b. Add a filter to show only lists with content state **migrated**.
2. Select the list. You can check multiple lists to migrate multiple lists.
3. Click **MIGRATE**

Repairing lists with migration issues

The On Demand Migration for SharePoint service can repair lists with the content state **Migrated with Issues**. See . When such a list is migrated, the contents of the list in the source and target tenants are compared. Missing items in the target are restored and items that are updated in the source since the previous migration will be incrementally migrated.

Lists are migrated based on the migration state. You can select multiple lists with different content states and the lists will be migrated based on its state. For example, an incremental migration will occur if new list items were added to a source list that was previously migrated, a repair migration will occur if the list was migrated with issues, and a full migration will occur for lists that have not been migrated.

To repair a list with migration issues:

1. Open the **SharePoint contents** tab and locate the SharePoint list as described below:
    a. Clear all filters and search criteria Add a filter to show only objects of type **List**.
    b. Add a filter to show only objects where Type = **List** and Content State = **Migrated with Issues**.
2. Select the list. You can select multiple lists if needed.
3. Click **MIGRATE**. The New Migration Task wizard starts.
4. **Step 1: Options**
    a. Specify the information as described below:
        i. **Map unmatched users to** - enter the Office 365 email address of an existing user in the target tenant.
        ii. **Include child structure and content** - select this option if the list has any hierarchical items that you want to migrate.
        iii. **Clear selected SharePoint objects from the target before starting the migration** - if this option is selected, a full migration will occur because the target list will be deleted and the existing migration state will be ignored.
    b. Click **Next**.
5. **Step 2: Version Options**
    a. Select from the following options:
        i. **Migrate most recent version only**
        ii. **Migrate two most recent versions**
        iii. **Migrate more versions (with options)** - you must specify additional criteria if you select this option.
    b. Click **Next**.

6. **Step 3: Schedule**
    a. Choose from one of three options to schedule the task. The scheduler will be activated only after you complete the task wizard.
        i. **Run now** - the task will run immediately.
        ii. **Run later** - the task will start after a time delay.
        iii. **Schedule** - specify a future date and time.
    b. Click **Next**.
7. **Step 4: Summary**
    a. Verify the task settings.
    b. Click **Next**.
8. When the task completes, verify the Content State for the selected list. If issues persist, check for event warnings.

Collections

SharePoint sites, webs and lists can be grouped in collections.

To gather a site and all its children into a collection

1. Add the site to a collection.
2. Run the **Discover SharePoint Contents** task for the site.

For known issues, see https://support.quest.com/technical-documents/on-demand-migration/current/release-notes/2#SharePoint

Exporting Site Collection Mapping

To export site collection mapping into comma-separated values (CSV) file for analytics or archival purposes open **SharePoint Contents** on SharePoint migration Dashboard, select site collections to export and click **Export**.

Output CSV file will contain mapping data for discovered and matched (migrated) site collection URLs.

Removing Sites from the Migration Project

You can temporarily remove any source site collections from the migration project, if necessary. Consider, site collections cannot be removed permanently from the migration project, all existing source site collections will be added in after next discovery.

To temporarily remove sites from the migration project:

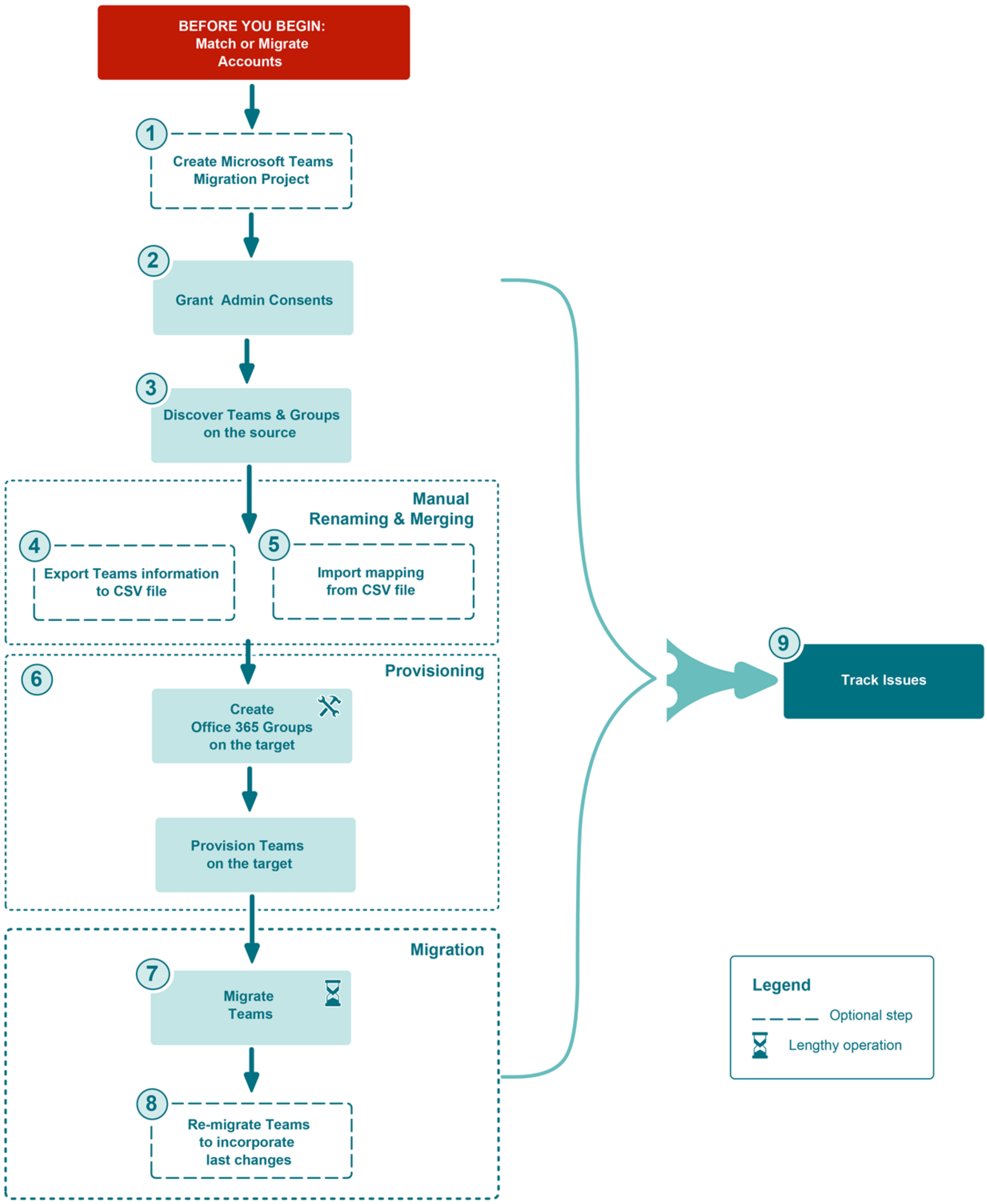
1. Go to the migration project **Dashboard**.
2. Click **SharePoint** widget.
3. Open **SharePoint Contents** and select the items you want to remove from the migration project.
4. Click **More Actions | Delete**
5. Click **Delete** to confirm the action.

8

Microsoft Teams Migration

On Demand Migration for Teams securely migrates Microsoft Teams and associated Microsoft 365 Groups across Office 365 tenants. You can also use this dashboard for migration of content for Microsoft 365 Groups without Teams functionality. (Microsoft 365 Groups Migration). Microsoft Teams migration requires additional licensing.

Basic Microsoft Teams migration workflow consists of the following steps:



#	Step
1	Create a migration project (created automatically with New Migration UI)

#	Step
2	Grant necessary permissions in case these permissions are not already granted (Prerequisites) **IMPORTANT:** It is not recommended to use existing user accounts as source and target Azure AD administrator accounts, because it is recommended to remove them for safety reasons after the migration will be completed. These accounts can be removed from teams as described in Finalizing the Migration.
3	Discover teams/groups on the source tenant On this step you can see names, suggested for target teams. In case you need some changes use manual mapping as described below. There are no provision on the target on this step. **TIP:** Organize teams in collections to streamline the provision and migration process
4	Export teams mapping to CSV file
5	Map teams manually using exported CSV file You can use manual mapping to migrate source team to the target team with another name. If the channel do not exist, it will be provisioned. Also you can use manual mapping to merge several source teams to one target team.
6	Create Microsoft 365 Groups and Provision teams on the target tenant. Target teams will be owned by the target Azure AD administrator account that is used to perform the provisioning. • Source Azure AD account will be added to all source teams as a member, and source private channels as an owner. • Target Azure AD account will be added to all target teams and Microsoft 365 Groups as a member and an owner, and target private channels as an owner These accounts can be removed from teams as described in Finalizing the Migration.
7	Migrate teams Migrate / merge all conversations (including inline content) from the source to target channels. • Target Azure AD account will own all private channels migrated to the target.
8	Re-migrate teams to incorporate supported changes made after the migration task (step 7) was started.
9	Monitor the progress and track issues

What We Migrate

IMPORTANT: Teams migration from one education tenant (Office 365 for Education) to another is partially supported. The following team types and supported content can be migrated:

- Standard Team
- Class Team
- PLC Team
- Staff Team

During provisioning the teams with the same type will be created in the target tenant. Provisioning of public teams is not supported for migration scenarios from one education tenant to another.

Assignment app, personal OneNote notebook linked to a Teams channel and the OneNote tab linked to another team are currently not supported. Links to files in migrated messages are not supported in case these links point to files located outside the default SharePoint URL. These links are missing in the target.

Objects and content types

Object	Support	Comments
Team owners and team members	✔	Only for Microsoft 365 Groups that are migrated / matched
Public channels	✔	
Private channels	✔	See **Channel settings** subsection below.
Conversations	✔	
Associated SharePoint document libraries (Files)	✔	
Team picture	✔	
Timestamps	✔	
Team settings	partial	See **Team settings** subsection below
Custom tags for teams	✔	
Guest accounts and conversations	✔	
Planner (including Planner tab app)	✔	
Custom website tab	✔	
OneNote	✔	Before to start OneNote migration you should re-grant **Migration.Teams** admin consent on **Tenants**.
Chats	✔	Images, media files and documents referenced in one-on-one or group chats are stored in your OneDrive for Business folder. They must be migrated using the On Demand Migration for OneDrive service, before you migrate the chats. Files that are linked to the private chats and

Object	Support	Comments
		meetings are migrated but do no display in the Files tab of private chats and meetings.
Applications	partial	Planner, Word, Excel, and PowerPoint tab apps
Wiki sections and pages	✘	
Bots	✘	
Applications including Shifts for schedule management	✘	
Inbox folder and Calendar from the group mailbox associated with a team	✔	
Formatted text	✔	
Authorship	partial	Authorship in messages is migrated as a string with author name and creation date. File authorship is supported.
Link preview of public sites	✔	
Mentions: • Users • Channels • Teams	✔	Mention in migrated message can be used only if mentioned source object has a pair in the target
Images posted inline from buffer	✔	
Emoji, Teams GIFs, memes	✔	
Link preview of public images	✔	
Attached images, media files, documents	✔	
Meeting recordings	partial	Recordings of scheduled meetings in a team channel, stored in SharePoint/OneDrive, are migrated. • Meeting recordings stored in Microsoft Stream (Classic) are not migrated; the link to the recording on the source team channel is retained. • On Demand does not support meeting recordings in a group chat. Recordings in small groups and one-to-one chats cannot be migrated with the On Demand Migration for Teams service. Since the recording file is stored in the chat organizer's OneDrive account, you can use the On Demand Migration for OneDrive service to migrate recordings.

Object	Support	Comments
		• On Demand does not support meeting recordings for "Meet now" meetings.
Meeting Notes in private meetings	✗	
Whiteboards in private meetings	✗	
E-mail attachments	✗	
Code snippets	✗	
Meeting conversations	✗	
Announcements	✓	
Files uploaded from mobile application:		
Media files	✓	
Voice recordings	✓	
Documents	✓	
Rich card attachments:		
vnd.microsoft.card.hero	✓	
vnd.microsoft.card.thumbnail	✓	
application/vnd.microsoft.card.adaptive	✗	
vnd.microsoft.card.animation	✗	
vnd.microsoft.card.audio	✗	
vnd.microsoft.card.video	✗	
vnd.microsoft.com.card.receipt	✗	
vnd.microsoft.com.card.signin	✗	

Team Settings

Category	Setting	Supported?
Team picture	Team picture	✓
Team description	Team description	✓
Member permissions	Allow members to create and update channels	✓
Member permissions	Allow members to create private channels	✓
Member permissions	Allow members to delete and restore channels	✓
Member permissions	Allow members to add and remove apps	✓
Member permissions	Allow members to upload custom apps	✗
Member permissions	Allow members to create, update, and remove tabs	✓
Member permissions	Allow members to create, update, and remove connectors	✓

Category	Setting	Supported?
Member permissions	Give members the option to delete their messages	✔
Member permissions	Give members the option to edit their messages	✔
Guest permissions	Allow guests to create and update channels	✔
Guest permissions	Allow guests to delete channels	✔
@mentions	When teams are migrated, each instance of *@mentions* generates a new activity email and users could receive a large number of unexpected emails. As a result *@mentions* are migrated as text and new activity emails are suppressed.	
Team code	Team code	✘
Fun stuff	Enable Giphy for this team	✔
Fun stuff	Filter out inappropriate content using one of the setting below	✔
Fun stuff	Enable stickers and memes	✔
Fun stuff	Allow memes to be uploaded	✔

Channel Settings

Category	Setting	Supported?
General	All	✔
Public channels	All	✔
Private channels	All. The Teams application will not reflect the updates immediately. The Teams application may need to be open for up to a 20 hours before changes are reflected due to Microsoft limitations.	✔

Group Settings

Category	Setting	Supported?
General	Allow external senders to email this group	✔
General	Send copies of group conversations and events to group members	✔
General	Hide from my organization's global address list	✔

Teams migration from a Commercial tenant to a GCC High tenant

The table below lists the content types in Microsoft Teams that are available for migration from a Commercial tenant to a GCC High tenant with the On Demand Migration for Teams service.

Content type	Available in GCC High	Supported by On Demand Migration
Team owners and team members (Creation of Microsoft 365 Groups)	✓	✓
Public channels	✓	✓
Private channels	✗	✗
Conversations	✓	✓
Associated SharePoint document libraries (files)	✓	✓
Team picture	✓	✓
Timestamps	✓	✓
Custom tags for teams	✗	✗
Guest accounts and conversations	✓	✓
Planner (including Planner tab app)	✓	✓
Custom website tab	✓	✓
OneNote	✓	✗
Chats	✓	✗
Applications	✓	✓
Wiki sections and pages	✓	✗
Bots		✗
Applications including shifts for schedule management	✓	✗
Calendars	✓	✗
Group mailbox associated with team	✓	✗
Formatted text	✓	✓
Authorship	✓	✓
Link preview of public sites	✓	✓
Mentions • Users • Channels • Teams	✓	✓
Images posted inline from buffer	✓	✓
Emoji, Teams GIFs, memes	✓	✓
Link preview of public images	✓	✓
Attached images, media files, documents	✓	✓
Email attachments	✓	✗
Code snippets	✓	✗

Content type	Available in GCC High	Supported by On Demand Migration
Meeting conversations	✔	✘
Announcements	✔	✔

Prerequisites

Verify the following requirements are met before migrating Microsoft Teams. **If these actions are not performed, discovery, provision and migration tasks will fail or some data might be lost!**

- Consents are already granted for source and target tenants.
  The following consents should be granted before Teams migration feature can be used
  - Migration - Basic,
  - Migration - Mailbox Migration
  - Migration - SharePoint,
  - Migration - Teams.

TIP: If the admin consents are not granted or expired, **Discover Teams** action is disabled and the following notification is displayed: **Grant admin consent to the following Migration sub modules on the Tenants page for both source and target tenants: Basic, SharePoint, and Teams**. Open **Tenants** page and grant the necessary Required Consents and Permissions so that the product can access the source and target tenants. You will be redirected to the Microsoft web site for granting admin consent. Once admin consent is granted, you can start discovering Teams. On Demand for Migration uses the global administrator account to grant consent because the 'admin consent flow' which it uses requires it; read more about the admin consent flow experience.

- User must be matched or migrated before using the On Demand Migration for Teams service.
- Images, media files and documents referenced in one-on-one or group chats are stored in your OneDrive for Business folder. They must be migrated using the On Demand Migration for OneDrive service, before you migrate the chats.
- It is recommended to create or use dedicated (not added as owner or member to any team) source and the target Azure AD administrator accounts.

IMPORTANT: It is not recommended to use existing user accounts as source and target Azure AD administrator accounts, because it is recommended to remove them for safety reasons after the migration will be completed. These accounts can be removed from teams as described in Finalizing the Migration.

- Azure AD administrator accounts should have Teams license.
- It is not recommended that you change your Azure AD administrator accounts before completing the migration project.
- Azure AD administrator accounts should be granted the **Global Administrator** or **Teams Administrator** role on the tenants for which these account are used.

- Azure AD administrator accounts should be granted Application Impersonation role on the tenants for which these account are used.
- Accounts joined to existing teams should be matched or migrated in the migration project.

Required permissions

Feature	Required permissions
Migrate conversations	Read all channel messages
	Have full access to the Chat Service Aggregator
	Have full access to the Skype Teams Service
	Create chat and channel messages with anyone's identity and with any time stamp
Migrate private chats	Read all chat messages
	Read and write user chat messages
Provision groups and teams	Read and write directory data
	Read and write all groups
Migrate files and OneNote items	Read and write all OneNote notebooks
	Read and write items in all site collections
	View and modify notes for all users
Migrate groups and teams membership	Read all users' full profiles
	Read or write user region
	Add and remove members from all teams
	Add and remove members from all channels

Azure AD administrator accounts

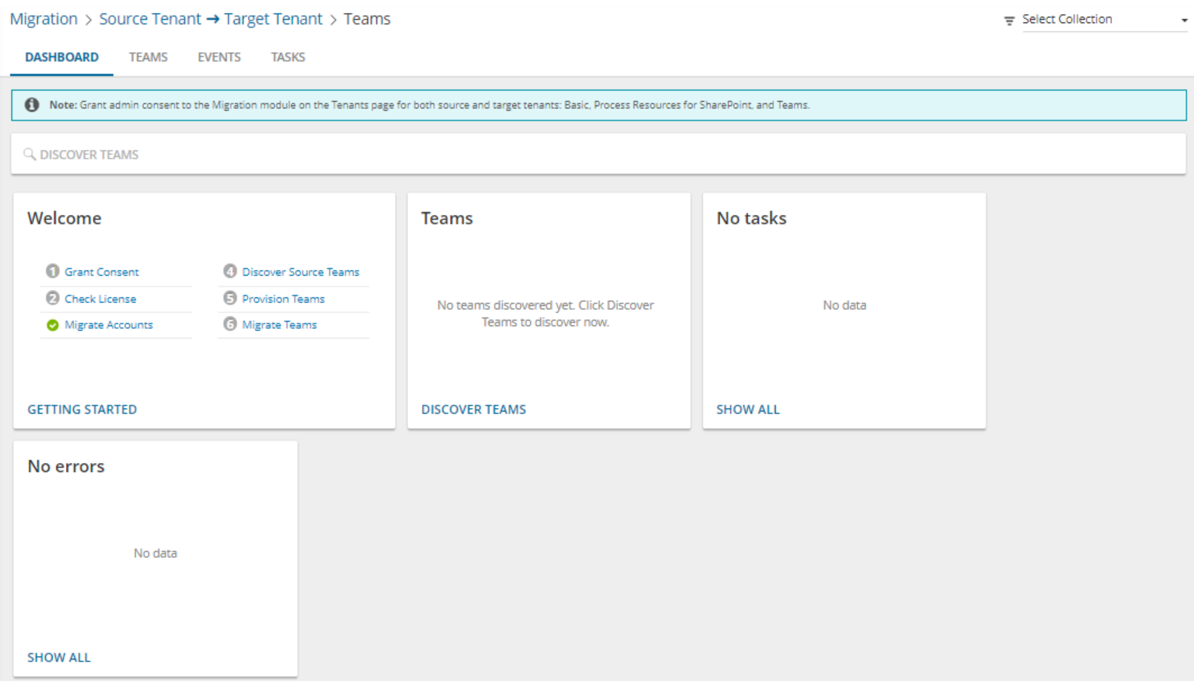
It is strongly recommended to create dedicated accounts as the source and target Azure AD administrator accounts. These accounts should not be an owner or member of any team. For security reasons it is recommended to remove these accounts once the migration is complete.

The target Azure AD administrator account use is in and not limited to the following scenarios:

- The target Azure AD administrator account that is used to perform Teams provisioning creates and owns these provisioned target teams.
- The target Azure AD administrator account is added to all target teams and Microsoft 365 Groups as a member and an owner, and to all target private channels as an owner.

- The target Azure AD administrator account is used to perform the Teams migration and displayed as the owner of all migrated conversation and chat messages and planner tasks on the target.
- The target Azure AD administrator account is added to all the chats (both group chats and private chats) as a participant during chats migration, and then removed from the migrated chats as soon as the chat migration is complete. All migrated chats of the target Azure AD administrator account are hidden when the chat migration is complete.

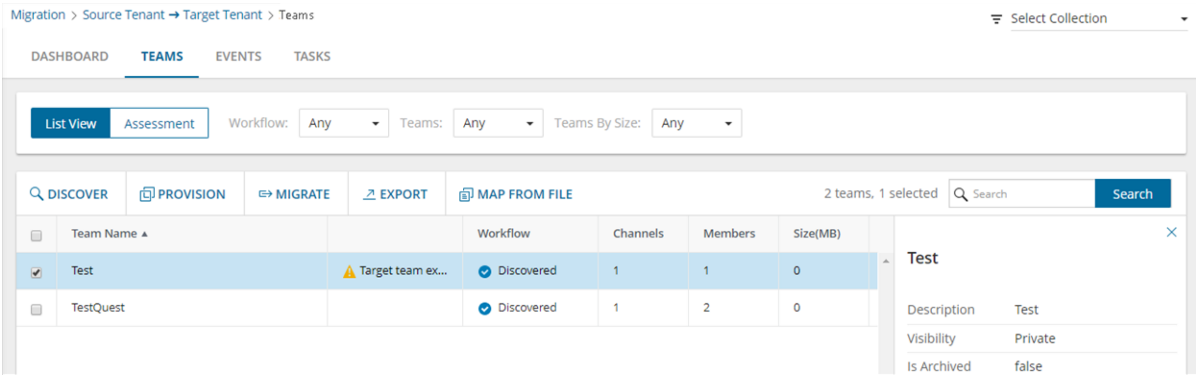
Teams Migration Interface Walkthrough



Using this new intuitive interface you can:

- Keep track of your location within project and quickly return to the main project dashboard using breadcrumbs on the top of the pane
- View list of discovered teams with last information, completed workflows, team information, and last events related to the teams
- Switch to assessment view to track potential problems, misconfiguration, and risks that might adversely affect the migration
- Quickly navigate to the event lists
- Quickly navigate to the tasks list
- Create discovery task, provision tasks, and teams migration tasks
- Organize the teams into collections that act as “projects within project”. The collections allow you to structure teams.
- Export feature data into comma-separated file and use this file for manual mapping

- Search teams
- Filter teams by workflow, team state or size
- Select a team to view details on the right pane. See this pane for extended details related to the selected object .



Assessment View for Microsoft Teams

See the Pre-Migration Assessment for Teams for the complete list of available reports.

Discovering Teams

In this topic:

- Prepare a CSV file for discovering teams
- Create and run a New Teams Discovery Task
- Review the New Teams Discovery Task
- Review the New Teams Discovery Task events
- Review the Collect Statistics Task
- Review the events for the Collect Statistics Task
- Review the statistics collected

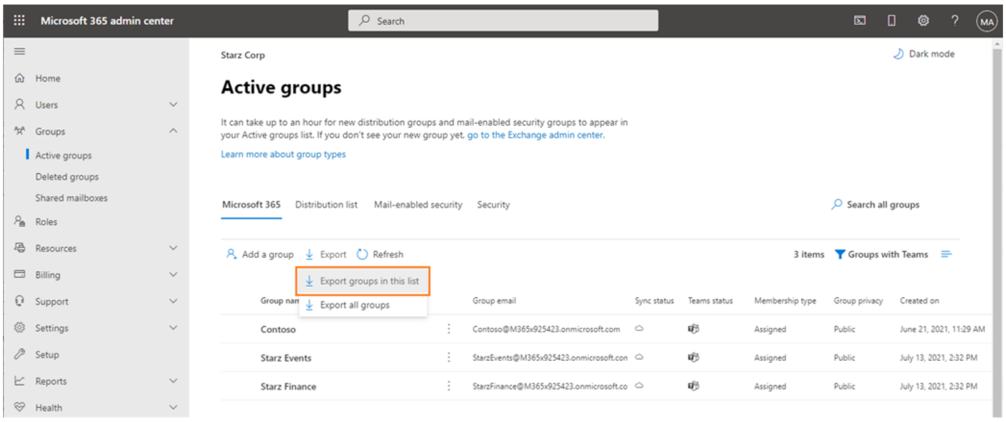
Prepare a CSV file for discovering Teams

This step is required if you plan to discover teams using a CSV file. When you have a large set of teams but you want to migrate a subset of those teams, the CSV file lets you specify the teams that you want to discover and ignore the rest. You can then use this file in the New Teams Discovery Task as described in this topic to discover the teams from the source tenant.

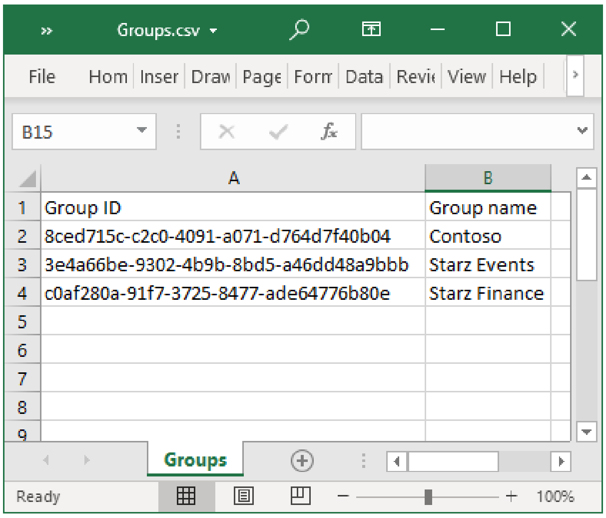
To prepare the CSV file:

1. Log in to the **Microsoft 365 admin center** (https://admin.microsoft.com) with the credentials of your source tenant administrator.
2. From the navigation pane, click **Active groups**.

3. Select **Microsoft 365** tab in the *Active Groups* page
4. Set the list filter to **Groups with Teams**.
5. Click **Export** and then click **Export groups in this list**. A *Groups.csv* file will be downloaded to your computer.



6. Edit the CSV file and retain the **Group ID** and **Group name** columns. Then retain the teams you want to discover and delete the rest. If you retain a row that references a group without a team, the group will be ignored during discovery.

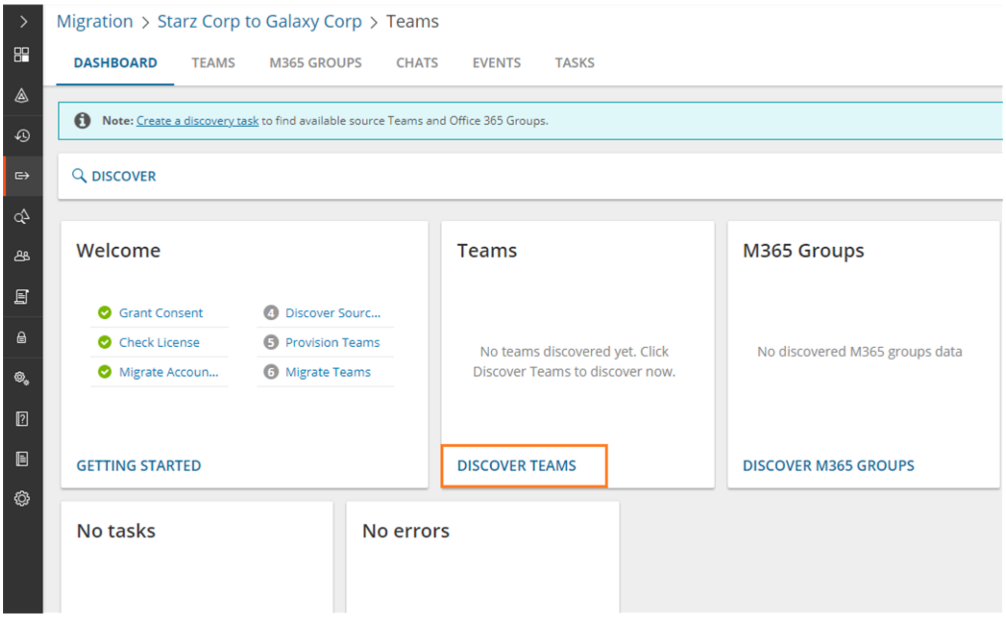


7. Save the CSV file. You may rename the file if needed.

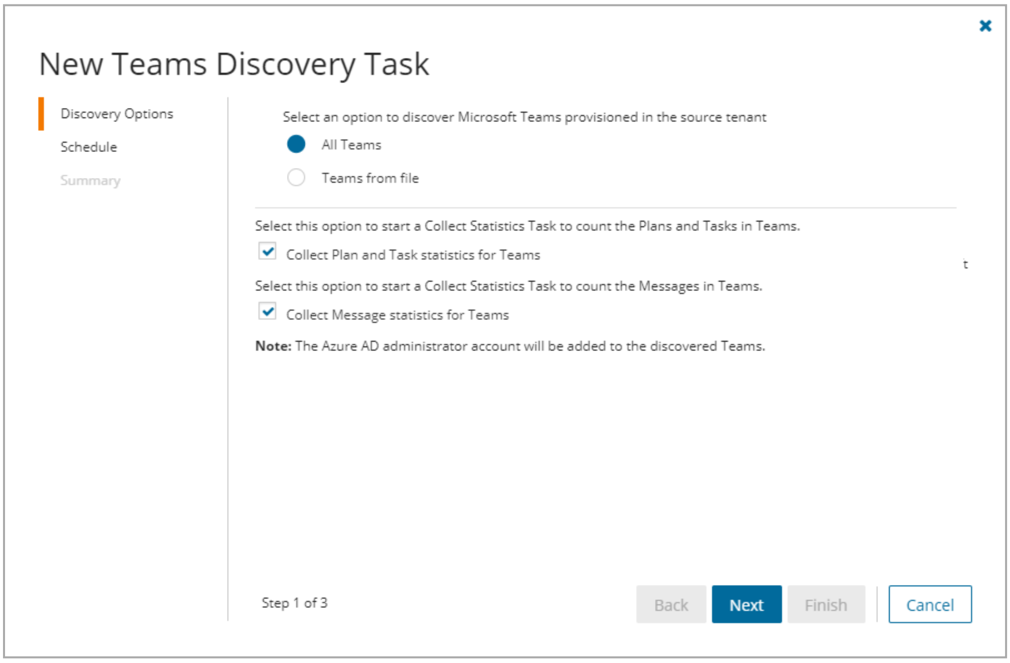
Create and run a New Teams Discovery Task

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migration** to open the *My Projects* list.
3. Create a new project or select an existing project.
4. Click **Teams** from the project tiles. You can also click **Open Project** to open the project dashboard and then click **Open** from the Teams tile. The *Teams* dashboard opens.

5. Click **Discover Teams** from the *Teams* tile in the Teams dashboard
   - or -
   Select the **Teams** tab and select **List View** if not already selected. Then click **Discover** from the *Actions* ribbon.

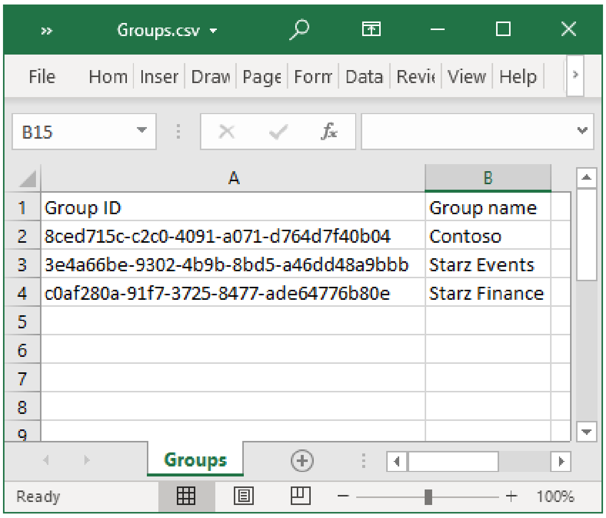


6. The *New Teams Discovery Task* wizard opens.
7. Step 1: **Discovery Options**



a. **All Teams** - select this option to discover all Teams from the source tenant.

b. **Teams from file** - select this option to discover Teams referenced in a CSV file when you want to discover a subset of the Microsoft Teams in the source tenant.
Then click **Browse** and select the CSV that contains the Group IDs and Group names of the teams that you want to discover.



c. **Collect Plan and Task statistics for Teams** - Select this option to start a **Collect Statistics Task** to count the number of Plans and Tasks in Teams.

d. **Collect Message statistics for Teams** - Select this option to start a **Collect Statistics Task** to count the number of messages in Teams.

> **NOTE:** When a **Collect Statistics Task** is started, the Azure AD administrator for the source tenant will be added to all teams, or the teams specified in a CSV file. The additional information collected by the tasks are used in the migration process for teams and helps improve the performance of the migration task.

e. Click **Next**.

8. Step 2: **Schedule**

a. Choose from one of three options to schedule the task. The scheduler will be activated only after you complete the task wizard.

- **Run now** - the task will run immediately.
- **Run later** - the task must be started manually.
- **Schedule** - specify a future date and time to run the task.

b. Click **Next**.

9. Step 3: **Summary**

a. Verify the task specifications as described below:

i. **Name** - name of the task. You can specify a custom name.

ii. **Source tenant** - name of the tenant where the statistics will be collected.

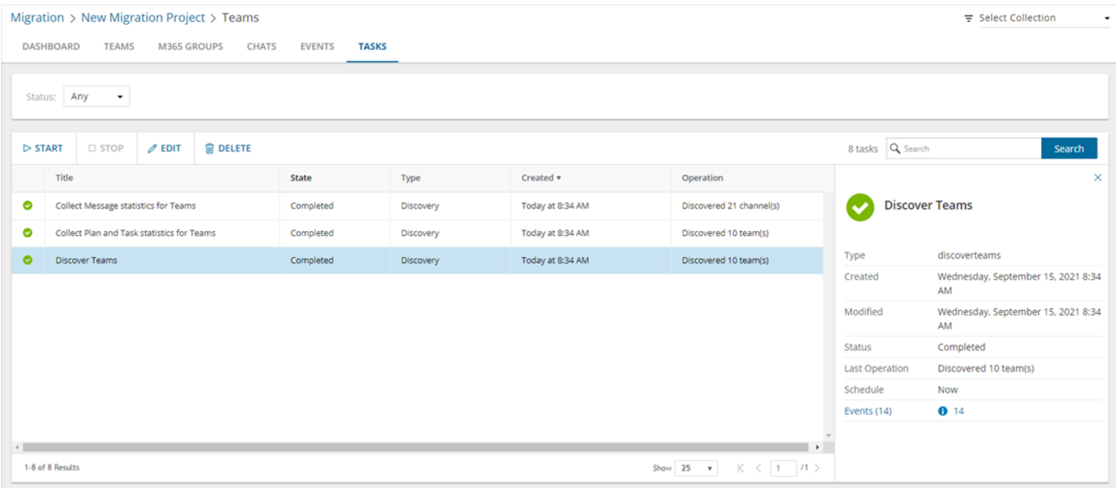
iii. **Target tenant** - name of the target tenant in this project.

iv. **Scheduled start** - date and time when the task will start. Now indicates that the task will start immediately.

b. Click **Back** to revise or review a previous step or click **Finish** to complete the task wizard and start the task as scheduled.

Review the New Teams Discovery Task

1. Select the **Tasks** tab.
2. Select the task that you want to review. The default name is `Discover Teams`.
3. In the task details pane that opens, the information presented is as described below:
   a. **Type** - Type of the task. The type is `discoverteams`.
   b. **Created** - Date and time when the task was created.
   c. **Modified** - Date and time when the task was last updated.
   d. **Status** - State of the task.
   e. **Last Operation** - The action that was most recently performed in this task.
   f. **Schedule** - Date and time when the task started. Now indicates that the task started immediately after the task was created.
   g. **Events (*number*)** - Number indicates the count of events that the task encountered. The values indicate the type of the events and the event count for each type.

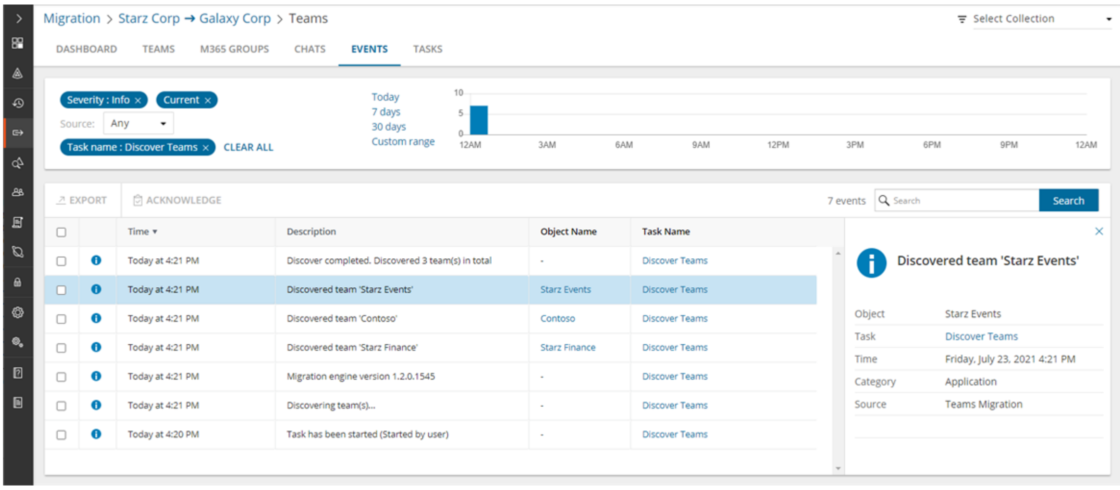


4. If you selected the options to collect statistics in the *New Teams Discovery Task* wizard, you will see additional tasks: *Collect Plan and Task statistics for Teams* and *Collect Message statistics for Teams*. Click each task to view the corresponding details in the details pane.

Review the New Teams Discovery Task events

1. Select the **Tasks** tab.
2. Select the task that you want to review.

3. In the task details pane that opens, click **Events (***number***)**. The *Events* tab opens with a filtered list of events for the selected task.
4. Select an event that you want to review. In the event details pane that opens, the information presented is as described below:
   a. **Object** - Name of the team or group discovered.
   b. **Task** - Name of the task.
   c. **Time** - Date and time when the event occurred.
   d. **Category** - Type of task. the value is `Application`.
   e. **Source** - Name of the On Demand Migration service



Review the Collect Statistics Task

1. Select the **Tasks** tab.
2. Select the Collect Statistics Task that you want to review. The default name is `Discover`.
3. In the task details pane that opens, the information presented is as described below:
   a. **Type** - Type of the task. The type is `discoverteams`.
   b. **Created** - Date and time when the task was created.
   c. **Modified** - Date and time when the task was last updated.
   d. **Status** - State of the task.
   e. **Last Operation** - The action that was most recently performed in this task.
   f. **Schedule** - Date and time when the task started. `Now` indicates that the task started immediately after the task was created.
   g. **Events (***number***)** - The number of events that the task encountered.

Review the events for the Collect Statistics Task

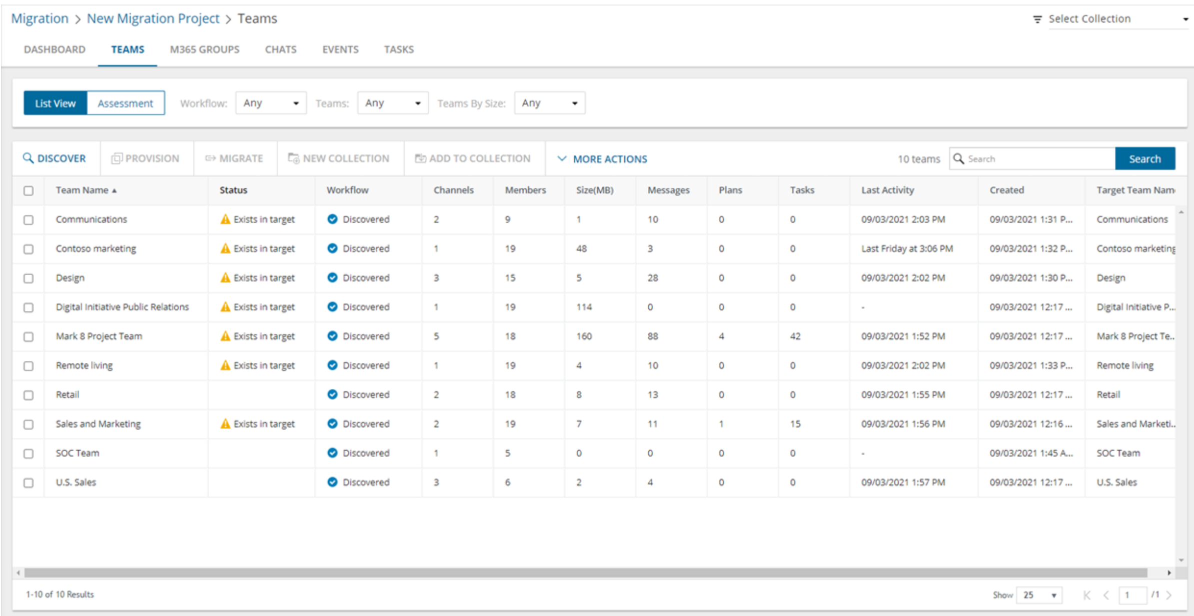
1. Select the **Tasks** tab.
2. Select the task that you want to review. The default name is `Teams Collect Statistics Task`.
3. In the task details pane that opens, click **Events (***number***)**. The *Events* tab opens with a filtered list of events for the selected task.
4. Select an event that you want to review. In the event details pane that opens, the information presented is as described below:
    a. **Object** - Name of the team.
    b. **Task** - Name of the task.
    c. **Time** - Date and time when the event occurred.
    d. **Category** - Type of task. the value is `Application`.
    e. **Source** - Name of the On Demand Migration service

Review the statistics collected

Statistics are collected if the option to collect statistics is selected in the New Teams Discovery Task. Statistics are collected for teams and groups.

To review the statistics for Teams:

1. From the Team dashboard, click the **Teams** tile.
2. Select the **Teams** tab and select **List View** if not already selected.



The columns are as described below:

Team Name - Name of the team in the source tenant.

Status - Status of the task in its various stages of migration. If the team in the source tenant exists in the target tenant, the value `Exists in target` is displayed.

Workflow - The stage of team in the migration process. Value should be `Discovered`.

Channels - Number of channels in the team.

Members - Number of members in the team.

Size (MB) - Total size of files in a team.

Messages - Total number of messages across all channels of the team

Plans - Number of Planner plans in the team.

Tasks - Number of Planner tasks across all plans in the team.

Last Activity - The most recent activity time for the team in the source tenant.

Created - Date and time when the team task was created.

Target Team Name - Name of the corresponding team in the target tenant if it exists.

Source MailNickname: The mail nickname of the team in the source tenant.

Discovering Teams and Groups

Every team is associated with a Microsoft 365 Group, but there are groups that are not associated with teams. In this topic, the term **team** means a Microsoft Team and includes its associated group, and the term **group** means a Microsoft 365 Group that is not associated with a team.

> **NOTE:** This topic explains the process to discover both teams and groups. If you want to discover only teams, see Discovering Teams. If you want to discover only groups that are not related to teams, see Discovering Groups.

In this topic:

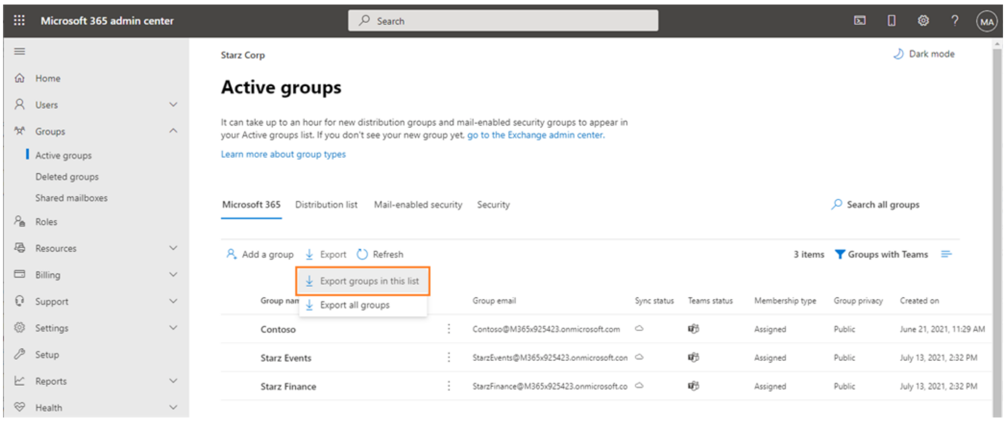
- Prepare a CSV file for discovering Teams & Groups
- Create and run a New Teams & Groups Discovery Task
- Review the New Teams & Groups Discovery Task
- Review the New Teams & Groups Discovery Task events
- Review the Collect Statistics Task
- Review the events for the Collect Statistics Task
- Review the statistics collected

Prepare a CSV file for discovering Teams & Groups

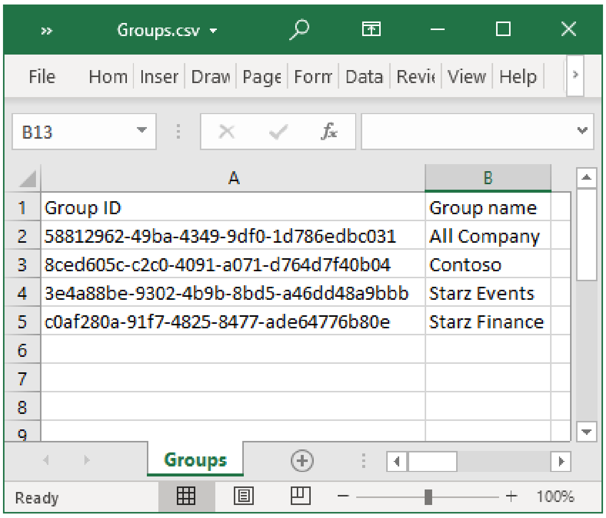
This step is required if you plan to discover teams and groups using a CSV file. When you have a large set of teams and groups but you want to migrate a subset of the objects, the CSV file lets you specify the teams and groups that you want to discover and ignore the rest. You can then use this file in the New Teams & Groups Discovery Task as described in this topic to discover the teams from the source tenant.

To prepare the CSV file:

1. Log in to the **Microsoft 365 admin center** (https://admin.microsoft.com) with the credentials of your source tenant administrator.
2. From the navigation pane, click **Active groups**.
3. Select **Microsoft 365** tab in the *Active Groups* page
4. Click **Export** and then click **Export all groups**. A *Groups.csv* file will be downloaded to your computer.



5. Edit the CSV file and retain the **Group ID** and **Group name** columns. Then retain the teams and groups you want to discover and delete the rest.

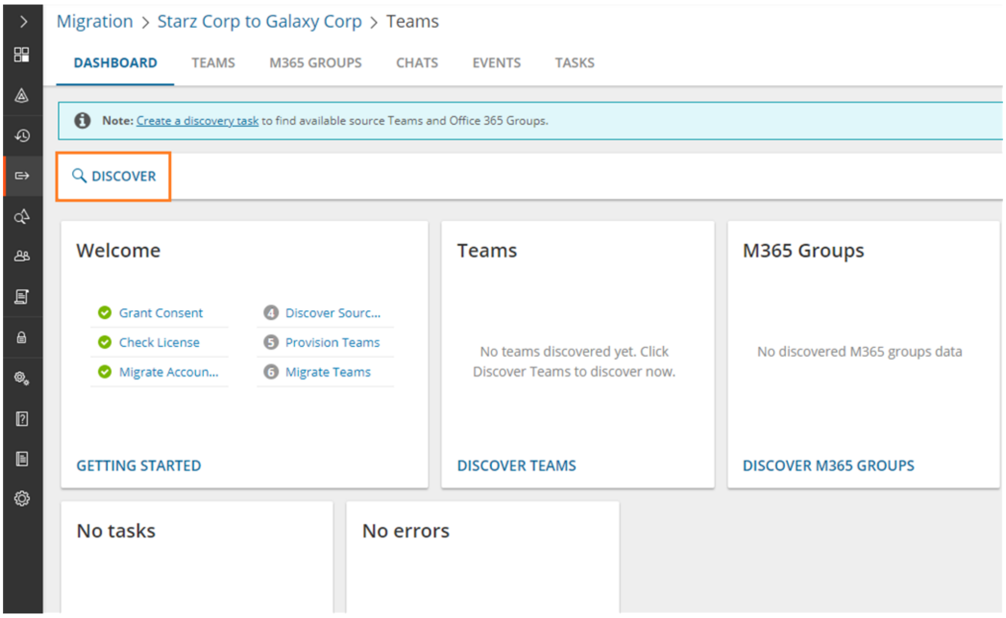


6. Save the CSV file. You may rename the file if needed.

Create and run a New Teams & Groups Discovery Task

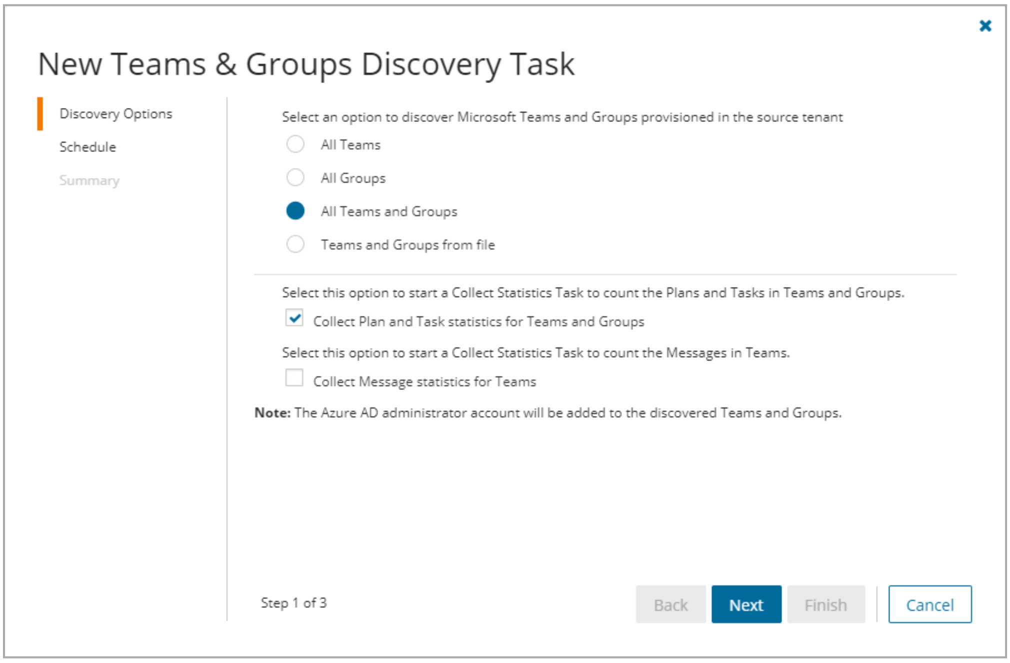
1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migration** to open the *My Projects* list.
3. Create a new project or select an existing project.
4. Click **Teams** from the project tiles. You can also click **Open Project** to open the project dashboard and then click **Open** from the Teams tile. The *Teams* dashboard opens.

5. Click **Discover** from the Teams dashboard or click the **Create a discovery task** link in the information panel.



6. The *New Teams & Groups Discovery Task* wizard opens.

7. Step 1: **Discovery Options**

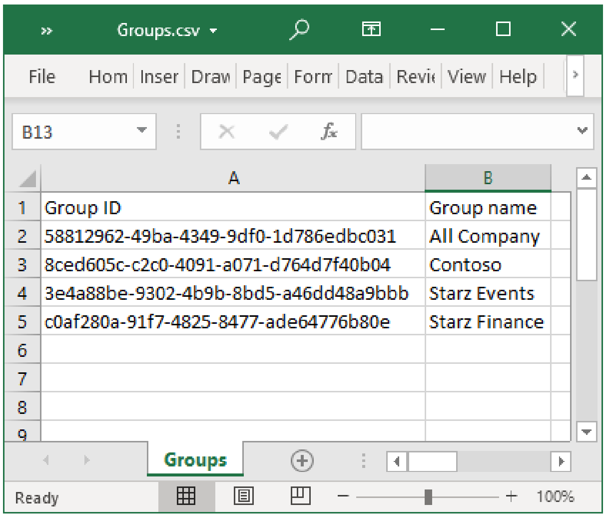


   a. **All Teams** - select this option to discover all Microsoft Teams.

   b. **All Groups** - select this option to discover all Microsoft 365 Groups without Teams.

   c. **All Teams and Groups** - select this option to discover Microsoft 365 Groups and Teams.

d. **Teams and Groups from file** - select this option to discover Microsoft 365 Groups and Teams referenced in a CSV file when you want to discover a subset of all the Microsoft Teams and Groups in the source tenant.
Then click **Browse** and select the CSV that contains the Group IDs and Group names of the teams that you want to discover.



e. **Collect Plan and Task statistics for Teams** - Select this option to start a **Collect Statistics Task** to count the number of Plans and Tasks in Teams. This option is available when the **All Teams** option is selected.

f. **Collect Message statistics for Teams** - Select this option to start a **Collect Statistics Task** to count the number of messages in Teams. This option is available when the **All Teams**, **All Teams and Groups** or **Teams and Groups from file** option is selected.

g. **Collect Plan and Task statistics for Groups** - Select this option to start a **Collect Statistics Task** to count the number of Plans and Tasks in Microsoft 365 Groups. This option is available when the **All Groups** option is selected.

h. **Collect Plan and Task statistics for Teams and Groups** - Select this option to start a **Collect Statistics Task** to collect additional information about Teams and Microsoft 365 Groups. This option is available when either the **All Teams and Groups** or **Teams and Groups from file** option is selected.

> **NOTE:** When a **Collect Statistics Task** is started, the Azure AD administrator for the source tenant will be added to all teams, all groups or the teams and groups specified in a CSV file. The additional information collected by the tasks are used in the migration process for groups and helps improve the performance of the migration tasks.

i. Click **Next**.

8. Step 2: **Schedule**

a. Choose from one of three options to schedule the task. The scheduler will be activated only after you complete the task wizard.

- **Run now** - the task will run immediately.
- **Run later** - the task must be started manually.
- **Schedule** - specify a future date and time to run the task.

b. Click **Next**.

9. Step 3: **Summary**

   a. Verify the task specifications as described below:

      i. **Name** - name of the task. You can specify a custom name.

      ii. **Source tenant** - name of the tenant where the statistics will be collected.

      iii. **Target tenant** - name of the target tenant in this project.

      iv. **Scheduled start** - date and time when the task will start. Now indicates that the task will start immediately.

   b. Click **Back** to revise or review a previous step or click **Finish** to complete the task wizard and start the task as scheduled.

Review the New Teams & Groups Discovery Task

1. Select the **Tasks** tab.
2. Select the task that you want to review. The default name is `Discover`.
3. In the task details pane that opens, the information presented is as described below:

   a. **Type** - Type of the task. The type is `discoverteams`.

   b. **Created** - Date and time when the task was created.

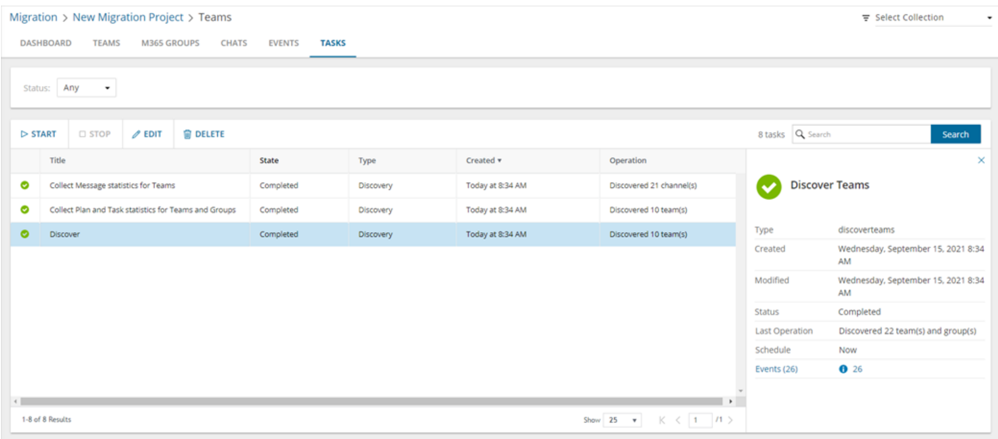
   c. **Modified** - Date and time when the task was last updated.

   d. **Status** - State of the task.

   e. **Last Operation** - The action that was most recently performed in this task.

   f. **Schedule** - Date and time when the task started. Now indicates that the task started immediately after the task was created.

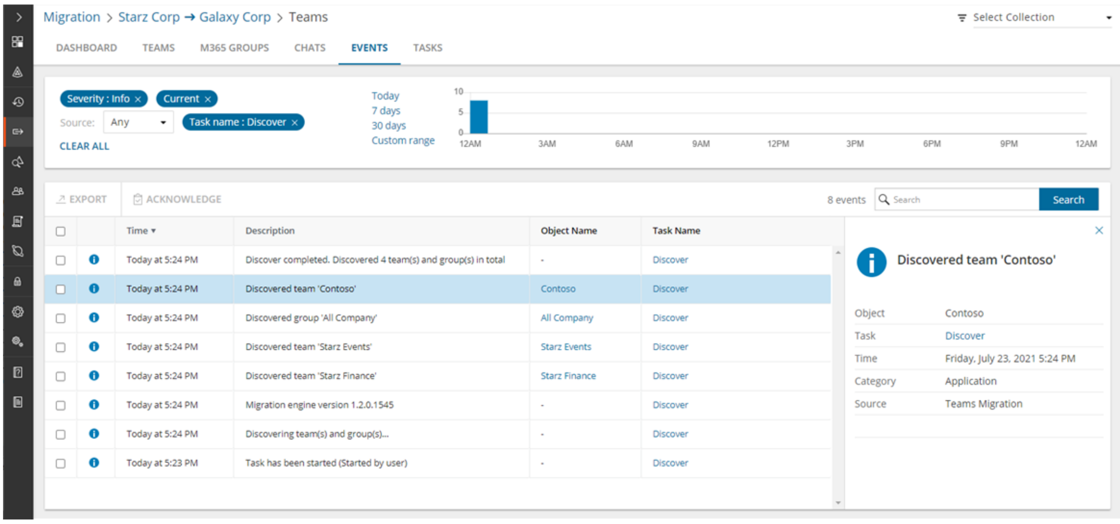
   g. **Events (*number*)** - Number indicates the count of events that the task encountered. The values indicate the type of the events and the event count for each type.



4. If you select the options to collect statistics in the *New Teams & Groups Discovery Task* wizard, you will see additional tasks: *Collect Plan and Task statistics for Teams and Groups* and *Collect Message statistics for Teams*. Click each task to view the corresponding details in the details pane.

Review the New Teams & Groups Discovery Task Events

1. Select the **Tasks** tab.
2. Select the task that you want to review.
3. In the task details pane that opens, click **Events (***number***)**. The *Events* tab opens with a filtered list of events for the selected task.
4. Select an event that you want to review. In the event details pane that opens, the information presented is as described below:
    a. **Object** - Name of the team or group discovered.
    b. **Task** - Name of the task.
    c. **Time** - Date and time when the event occurred.
    d. **Category** - Type of task. the value is `Application`.
    e. **Source** - Name of the On Demand Migration service



Review the Collect Statistics Task

1. Select the **Tasks** tab.
2. Select the Collect Statistics Task that you want to review. The default name is `Discover`.
3. In the task details pane that opens, the information presented is as described below:
    a. **Type** - Type of the task. The type is `discoverteams`.
    b. **Created** - Date and time when the task was created.
    c. **Modified** - Date and time when the task was last updated.
    d. **Status** - State of the task.
    e. **Last Operation** - The action that was most recently performed in this task.
    f. **Schedule** - Date and time when the task started. `Now` indicates that the task started immediately

after the task was created.

g. **Events (*number*)** - The number of events that the task encountered.

Review the events for the Collect Statistics Task

1. Select the **Tasks** tab.
2. Select the Collect Statistics Task that you want to review.
3. In the task details pane that opens, click **Events (*number*)**. The *Events* tab opens with a filtered list of events for the selected task.
4. Select an event that you want to review. In the event details pane that opens, the information presented is as described below:
    a. **Object** - Name of the team or group.
    b. **Task** - Name of the task.
    c. **Time** - Date and time when the event occurred.
    d. **Category** - Type of task. the value is `Application`.
    e. **Source** - Name of the On Demand Migration service

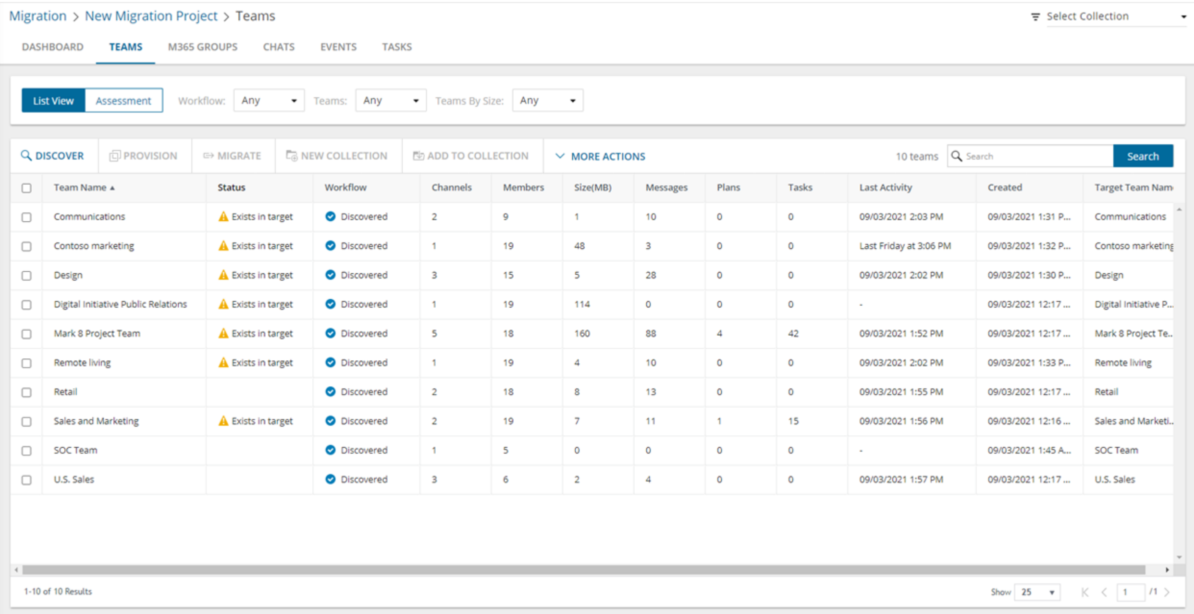
Review the statistics collected

Statistics are collected if the option to collect statistics is selected in the New Teams & Groups Discovery Task. Statistics are collected for teams and groups.

To review the statistics for teams:

From the Team dashboard, click the **Teams** tile.

> **NOTE:** Each team is associated with a Microsoft 365 group. These groups are not listed in the M365 Groups list.



The columns are as described below:

Team Name - Name of the team in the source tenant.

Status - Status of the task in the migration process. For example, after a discovery task, if the team in the source tenant exists in the target tenant, the value `Exists in target` is displayed.

Workflow - The stage of the team in the migration process. Value should be: `Discovered`.

Channels - Number of channels in the team

Members - Number of members in the team

Size (MB) - Total size of files in a team

Messages - Total number of messages across all channels of the team

Plans - Number of Planner plans in the team

Tasks - Number of Planner tasks across all plans in the team

Last Activity - The most recent activity time for the team in the source tenant

Created - Date and time when the team record was created in On Demand Migration

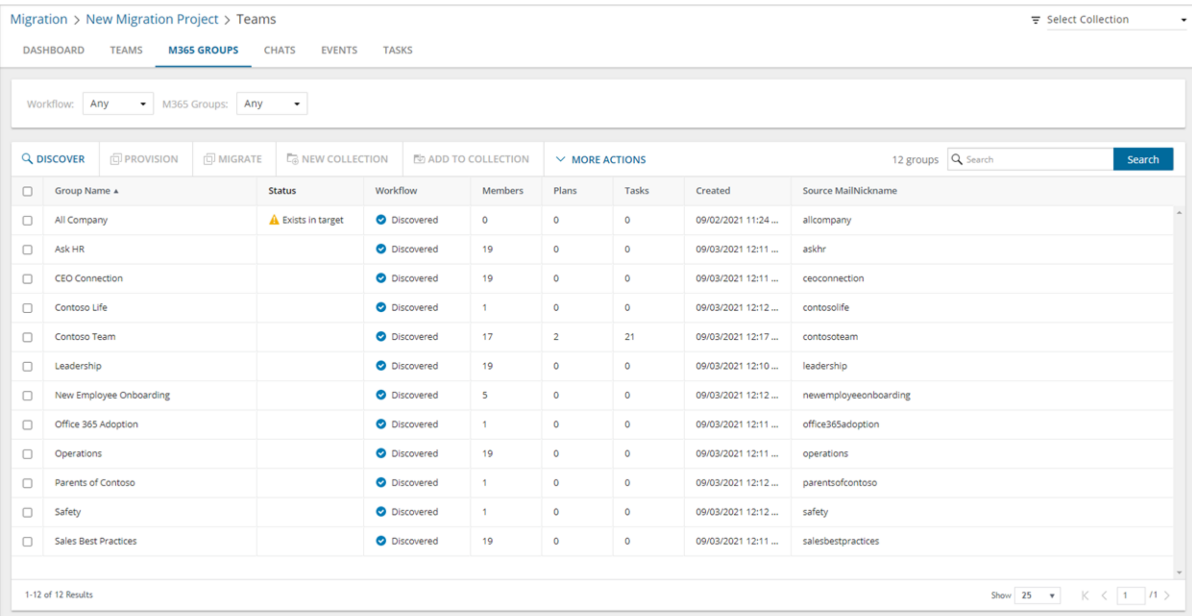
Target Team Name - Name of the corresponding team in the target tenant if it exists.

Source MailNickname: The mail nickname of the team in the source tenant

To review the statistics for groups:

From the Teams dashboard, click the **M365 Groups** tile.

> **NOTE:** The M365 Groups list displays groups that are not associated with teams.



The columns are as described below:

Group Name - Name of the group in the source tenant.

Status - Status of the task in the migration process. If the group in the source tenant exists in the target tenant, the value `Exists in target` is displayed.

Workflow - The stage of the group in the migration process. Values are: `Discovered`, `Provisioned` and `Migrated`

Members - Number of members in the group

Plans - Number of Planner plans in the group

Tasks - Number of Planner tasks across all plans in the group
Created - Date and time when the team record was created in On Demand Migration
Source MailNickname: The mail nickname of the team in the source tenant

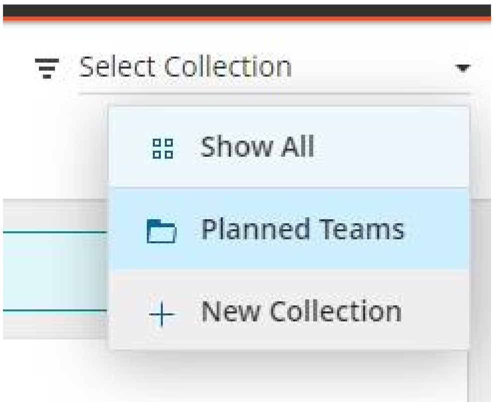
Using Collections for Teams

You can use collections to streamline the provision and migration process. There are two approaches:

- You can select discovered teams and create a new collection for them
- You can create a new empty collection and then populate it with discovered teams using comma-separated CSV file.

To create a new collection based on selected teams:

1. Click **Teams** on necessary migration project
2. Select teams you want to combine into the collection. You can use search for filtering out the teams by certain criteria or simply hand-pick the individual teams from the grid.
3. Click **+New Collection** in the top right corner of the list view and enter the informative collection name. Click **Save** to add this collection to the project.



To create a new empty collection and then populate it with teams:

1. On the dashboard click **Add To Collection**.
2. Enter the informative collection name. Click **Save** to add this collection to the project.
3. Populate it using comma-separated values (CSV) file as specified in Populating Collections.

Populating Collections

You can populate any existing collection using a comma-separated values (CSV) file with team attributes.

NOTES:

- CSV file can contain one or more columns. There are no special requirements for header names.
- One of column must contain case sensitive mail nickname data that will be used for matching.
- File names with non-ASCII characters are not supported.

To populate collection from CSV file

1. Prepare a comma-separated values (CSV) file with data of discovered teams you want to add to the collection. File can contain teams that have not been discovered, but these teams won't be added to the collection. One of the columns should contain the mail nicknames. For example:

```
MailNickname, ...
SampleName,...
```

2. Select a collection you want to populate on Dashboard and click it to open the Collection Dashboard.
3. Click **Fill from File** to populate the collection with discovered objects you specified in the file created on Step 1.
4. Click **Browse** to open the comma-separated CSV file created on Step 1.
5. Browse for file and click **Open**. Selected file name appears next to the **Browse** button.
6. Click **Populate** to populate the collection.

The collection is populated. You can see added objects on the Collection Dashboard.

NOTE: The objects that do not exist in the source or target tenants and the source teams that are not enumerated during the Discovery are ignored without producing an event.

Exporting Mapping for Teams

To export the teams mapping as a comma-separated values (CSV) file, select the required teams on the **Teams** tab on Teams migration Dashboard and click **Export**.

You can customize this file and use it as a base for manual mapping.

Exported data will contain source team name (may be team ID isntead), suggested target team name to provision and the **Source MailNickname** parameter specifies the alias for the associated Office 365 Group. This value will be used for the mail enabled object and will be used as PrimarySmtpAddress for this Office 365 Group. The value of the **Source MailNickname** parameter has to be unique across your tenant.

Using Manual Mapping for Teams

In some cases, you might want to rename the teams on target or merge them with the existing teams with different names. To achieve this goal, provide a file with the custom mapping between source and target teams. You might use the exported team mapping as a template.

1. Export a comma-separated values (CSV) as described in Exporting Mapping for Teams. Alternatively, you can create and use your own CSV file, as described below.

2. Edit **Target Team Name** column only to specify the target team names to create desired matched pairs. Do not change the rest of columns.

> **IMPORTANT:** When editing a CSV file, the following should be considered:
>
> - To ensure manual mapping will be completed successfully do not remove any columns from exported CSV file.
> - You can edit **Target Team Name** entries only, if necessary. Do not update the **Source MailNickname** column, this column contains mailnicknames for source tenant, and it is case sensitive. In case any objects are added by mistake, please remove entire rows related to these objects.
> - You can merge multiple source teams to a single target team. Just provide the same target team name in a mapping file.
> - File names with non-ASCII characters are not supported.

3. Open **Teams** tab and click **Map from File**.
   Do not select any teams from the list – you have already specified them in the file created on Step 1.
4. Click **Browse** to open the mapping file prepared on Step 1.
5. Browse for file and click **Open**. Selected file name appears next to the **Browse** button.
6. Schedule when the task will be started. See Task Scheduling for details. Click **Next** to view task summary.
7. Check selected options. Click **Finish** to save or start the task depending on schedule option selected.

The task is created. You can track the progress in the **Tasks** list or view the summary on the Dashboard.

Creating Mapping File

1. Prepare a comma-separated values (CSV) file with the matched teams pairs. The first row defines the names of the source and target attribute used for mapping. Subsequent rows list the matching values of the attributes (one pair per row.) This file should have two columns

```
Target Team Name,SourceMailNickName
Example_Name,SampleName
```

Target Team Name specifies team name, e.g., Example_Name, you want your source team (in this example the source team with SourceMailNickName SampleName) to be matched in target tenant.

SourceMailNickName specifies your source tenant team mail nickname, e.g., SampleName. This field is case sensitive.

> **NOTE:** File names with non-ASCII characters are not supported.

Pre-Migration Assessment for Teams

On Demand Migration analyzes your environment and tracks potential problems, misconfiguration, and risks that might adversely affect the migration. Use **Assessment** view to see the summary reports on the discovered data and use the automatic filters to quickly select certain items.

The following reports are available for **Teams**:

- **Workflow** - Teams sorted by completed workflow
  - Discovered
  - Processed
  - Migrated
- **Teams**- Teams sorted by processing status
  - Idle
  - In progress
  - Needs your attention
- **Teams By Size**
- **Teams By Last Activity Time**
- **Teams By Channel Count**
- **Teams By Member Count**

Once you handle the issues, if any, go to **List View** screen. You are ready to start the migration.

Provisioning Teams for Target Tenant

After all source teams are discovered you can start to provision teams on the target tenant.

IMPORTANT: Provisioning of public teams is not supported for migration scenarios from one education tenant to another. Only private teams can be provisioned for these scenarios.

The provision task help you to perform the following:

- Create Microsoft 365 Groups on the target tenant.
- Resolve naming conflicts.
- Provision teams to the target tenant.
- Provision team membership and ownership for provisioned teams.

Make sure that all associated accounts are matched or migrated before you create the provision task.

NOTE: When using Microsoft Teams for Education, use On Demand Migration for Teams to discover and migrate the EDU group. If you use On Demand Account Migration to discover and migrate the EDU group, then provisioning the EDU teams will fail with a “Request failed with BadRequest status code (Bad Request)” event error.

Create the provision task

Open the New Provision Task dialog

From the OnDemand Migration for Teams, **teams** tab

1. Check the teams to provision associated Office 365 group and teams on the target. Provisioned teams will be owned by target Azure AD administrator account. This account also will be added to the provisioned team as a member along with the members matched with source team members. In case any matched account cannot be found on the target, this account cannot be processed and related event will be reported.

   TIP: Use search and filtering to quickly navigate through the list of teams.

2. Click **provision** to open the **New Provision Task** dialog.

Fill in the New Provision Task dialog

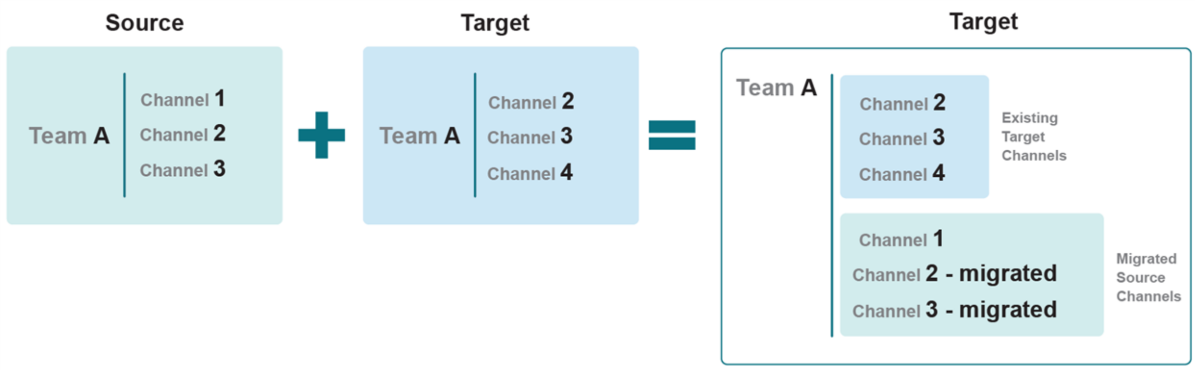
- Provision Options: Does a team with the same name already exist on the target?
- Provision Options: Target multi-geo tenant preferred teams location
- Provision Options: Suppress automatic Group Welcome Message sending
- Fill in the New Provision Task dialog: Schedule
- Verify the New Provision Task dialog: Summary

Provision Options: Does a team with the same name already exist on the target?

The default option is to **Provision a new team on the target with the original name plus suffix**. The default suffix is "Migrated". You can change the suffix via the **New team display name suffix** field.

The alternative is to **Merge to the existing team on target**. When selected, new fields become available. By default On Demand will **Provision a new channel on the target with the original name plus suffix**. You can change the default suffix "Migrated" via the **New channel display name suffix** field.

Alternatively, select **Merge source channel conversations with the target channel. Select this option if the target channel is empty**. If conversations already exist in the target channel then selecting this option will result in mixing the conversations from the source and the target on the target and is not revertible.



Provision Options: Target multi-geo tenant preferred teams location

Leave the preferred data location as **Default** if the target tenant is a multi-geo tenant (see Microsoft 365 Multi-Geo). All teams and groups will be migrated to the same region as the target admin.

Alternatively, select the geolocation configured for the target tenant.

> **TIP:** To migrate teams/groups to different regions, best practice is to create a collection for each region (see Using Collections for Teams) and add the teams/groups to the appropriate collection. Example collection names are "Migrate to EUR", "Migrate to JPN" and "Migrate to NAM". Use the collection as a filter to create the provision task.

Provision Options: Suppress automatic Group Welcome Message sending

When selected users will not be disturbed by automatic Microsoft messages regarding adding to the provisioned Teams.

> **NOTE:** Suppressing these messages may result in performance degradation due to issues with Microsoft's synchronization behavior. We suggest you check the performance during the pilot migration.
>
> For teams provisioned by tasks created in previous releases, for which Group Welcome Messages were suppressed by default, these email messages may be received in some cases, depending on stage of processing by Microsoft.

Fill in the New Provision Task dialog: Schedule

Schedule when the task will be started. See Task Scheduling for details.

Verify the New Provision Task dialog: Summary

View the task summary. Name the task and check selected options.

Click **Finish** to save or start the task depending on schedule option selected. The provision task is created. You can track its progress in the **Tasks**, view the summary on the Dashboard or monitor alerts and notifications in the **Events**.

Migrating Microsoft Teams

When you migrate teams, files stored in the corresponding SharePoint document libraries and OneNote items stored in asset libraries can be migrated. The SharePoint sites associated with teams may contain additional objects that cannot be migrated with the On Demand Migration for Teams service. The following information is made available to you to help you manage the migration of SharePoint objects that cannot be migrated:

1. When teams are provisioned on the target tenant, a SharePoint *New Discovery Task* is run. The task discovers the corresponding SharePoint site collection and its contents listed in the *SharePoint Contents* tab.
2. When teams are migrated, the *SharePoint Contents* list is updated, and the **Content State** of the objects is changed to `Migrated`. You can review the list and use the On Demand Migration for SharePoint service to migrate additional SharePoint objects.

To migrate Microsoft Teams:

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migration** to open the *My Projects* list.
3. Create a new project or select an existing project.
4. Click **Teams** from the project tiles. You can also click **Open Project** to open the project dashboard and then click **Open** from the Teams tile. The *Teams* dashboard opens.
5. Select one or more teams from the *Teams List View*.

   > **TIP:** It is recommended to select no more than 100 teams for the task to streamline the process. You can create several tasks that will be executed concurrently. Use search and filtering to quickly navigate through the list of teams.

6. Click **Migrate**. The *New Migration Task* wizard opens.
7. Step 1. **Migration Options**
   a. Choose from the following options:
      - **Channel Posts**(Messages) - Migrate the posts or messages in a channel.
      - **Channel Files** - Migrate the files, attachments, OneNote, Word, Excel and PowerPoint apps in the channel.
      - **Planner** - Migrate the Planner buckets, tasks, comments and the corresponding Planner tabs in teams.
      - **Group Mailbox** - Migrate the Microsoft 365 Group mailbox.

   When migrating Teams using **Channel Posts** (Messages), links to files that are not yet migrated to the target will not work. Re-migrate Teams using **Channel Files** to ensure the links work correctly. To learn more, see Re-migrating messages and files.

   > **TIP:** Migration task may hang due to group mailbox migration issue. If this is the case, stop migration task and re-run the team migration with the **Channel Posts** and **Channel Files** options selected. Then repeat migration of these teams with **Group Mailbox** option selected.

   b. Click **Next**.
8. Step 2: **Schedule**
   a. Choose from one of three options to schedule the task. The scheduler will be activated only after you complete the task wizard.
      - **Run now** - the task will run immediately.
      - **Run later** - the task must be started manually.
      - **Schedule** - specify a future date and time to run the task.

   b. Click **Next**.
9. Step 3: **Summary**
   a. Verify the task specifications as described below:
      i. **Name** - name of the task. You can specify a custom name.
      ii. **Source tenant** - name of the tenant where the statistics will be collected.
      iii. **Target tenant** - name of the target tenant in this project.
      iv. **Scheduled start** - date and time when the task will start. Now indicates that the task will start immediately.

b. Click **Back** to revise or review a previous step or click **Finish** to complete the task wizard and start the task as scheduled.

The migration task is created. You can track its progress in the **Tasks**, view the summary on the Dashboard or monitor alerts and notifications in the **Events**.

IMPORTANT: The task status in task list indicates the progress of this task. **Completed** status means this task processing is completed. If the migration has any errors, the status **Migration partially failed** will appear in the *Teams List View*.

Renamed Channel Migration

When a channel is renamed, Microsoft does not rename the corresponding SharePoint Document folder for this channel, this is a known issue. For example, when Channel Channel 1” is renamed to “Channel_Renamed”, the folder name under the “Files” tab is still “Channel_1”. After migration is completed, all messages and files can be opened correctly. Consider, that these files cannot be displayed on the target Files tab. This is because all the files are still stored and migrated under ““Channel_1” folder. “Channel_Renamed” folder does not exist until you click the “Channel_Renamed” channel’s **Files** tab, then the system will generate an empty folder for it. But no files will be stored there. To avoid files and message association breaking it is not recommended to rename folders manually. If necessary, you can copy necessary files to “Channel_Renamed' folder, but these files won't associated with messages.

Re-migrating messages and files

To re-migrate messages and files, re-run the task following the steps outlined in Migrating Microsoft Teams. Select whether to migrate messages with attachments from the various options.

NOTE:

- An incremental query to find messages and files that were added or changed is used automatically.
- The initial synchronization must have completed successfully in order for the incremental synchronization to start working for further migrations.
- Previously migrated messages and files will not be re-migrated by this process. We highly recommend you do not delete teams in the target tenant after migration.
- See What We Migrate to consider what changes are supported to be updated.
- It is recommended to perform re-migration before the source and target tenants will be switched.

Message updates

When Teams messages are re-migrated a delta query retrieves those messages that have been added or changed in the channels since the last synchronization. Messages that did not migrate completely previously, for example the attachment was unavailable, will be additionally migrated into new and modified messages.

File updates

Follow the steps outlined in Migrating Microsoft Teams and select **Migrate messages and files**.

NOTE: When Teams files are re-migrated an incremental query retrieves files that have been added or changed in the channels since the last synchronisation.

Migrating Microsoft Chats

On Demand Migration for Teams helps you discover and migrate **Microsoft Chats** for one or more matched users from a source tenant to a target tenant.

In this topic:

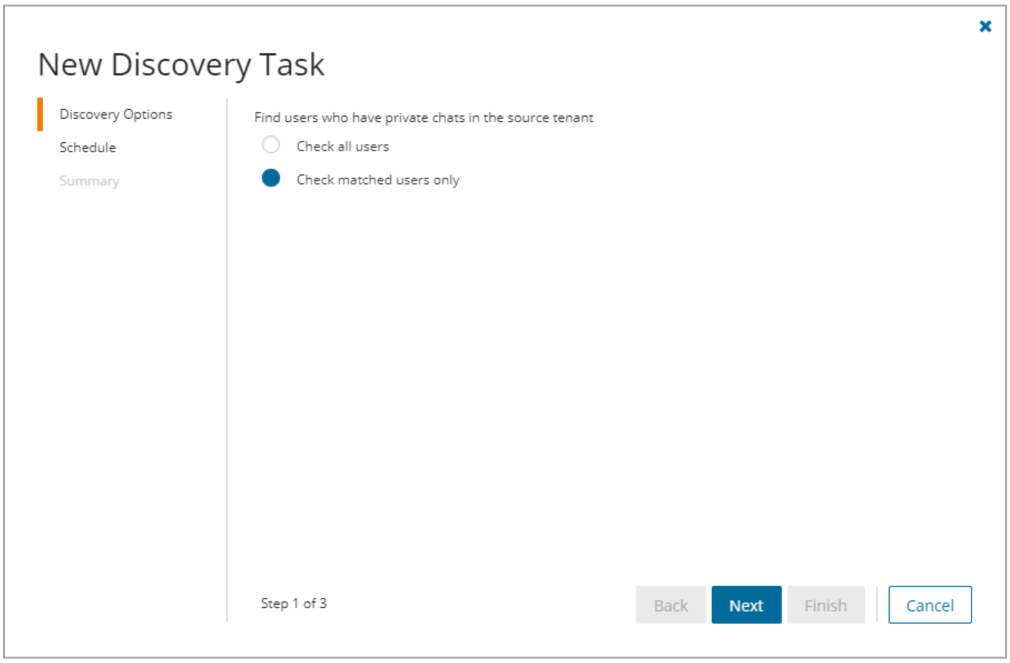
- Discover Microsoft Chats
- Review migration readiness
- Considerations
- Migrate Microsoft Chats
- Review the migration results
- Troubleshooting

Discover Microsoft Chats

The Discovery Task will list all user accounts that have a Teams Chat. If new users are added to the source tenant after the Discovery Task completes, you must re-run another Discovery task.

To discover Microsoft Chats:

1. Sign in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migration** to open the *My Projects* list.
3. Create a new project or select an existing project.
4. Click **Teams** from the project tile. You can also click **Open Project** to open the project dashboard and then click **Open** from the OneDrive tile. The *Accounts and User Data* dashboard opens.
5. Select the **Teams** tab and then select the**Chats** tab.
6. From the local toolbar, select **Discover**. The *New Discovery Task* wizard opens.
7. Step 1: **Discovery Options**
    a. Select from the following options:
        - **Check all users** - every user account will be checked for private chats
        - **Check matched users only** - user accounts that have a matching tenant UPN will be checked. All other accounts will be ignored.



   b. Click **Next**.

8. Step 2: **Schedule**
   a. Choose from one of three options to schedule the task. The scheduler will be activated only after you complete the task wizard.
      - **Run now** - the task will run immediately.
      - **Run later** - the task must be started manually.
      - **Schedule** - specify a future date and time to run the task.
   b. Click **Next**.
9. Step 3: **Summary**
   a. Verify the task specifications as described below:
      i. **Name** - name of the task. Specify an informative name for the task. It will greatly simplify the project management and event filtering in the future.
      ii. **Source tenant** - name of the tenant where the statistics will be collected.
      iii. **Target tenant** - name of the target tenant in this project.
      iv. **Scheduled start** - date and time when the task will start. **Now** indicates that the task will start immediately.
   b. Click **Back** to revise or review a previous step.
   c. Click **Finish** to complete the task wizard. The task will start as scheduled.

To review the Discover Chats task:

1. Select the **Tasks** tab.
2. Select the **Discover Chats** task that you want to review.

3. In the task details pane that opens, the information presented is as described below:
    a. **Type** - Type of the task. The type is **discover teams**.
    b. **Created** - Date and time when the task was created.
    c. **Modified** - Date and time when the task was last updated.
    d. **Status** - State of the task.
    e. **Last Operation** - The action that was most recently performed in this task.
    f. **Schedule** - Date and time when the task started. Now indicates that the task started immediately after the task was created.
    g. **Events (*number*)** - Number indicates the count of events that the task encountered. The values indicate the type of the events and the event count for each type.

To review the events for the Discover Chat task:

1. Select the **Tasks** tab.
2. Select the task named **Discover Chats** that you want to review.
3. In the task details pane that opens, click **Events (*number*)**. The *Events* tab opens with a filtered list of events for the selected task.
4. Select an event that you want to review. In the task details pane that opens, the information presented is as described below:
    a. **Object** - Not applicable for this event.
    b. **Task** - Name of the task.
    c. **Time** - Date and time when the event occurred.
    d. **Category** - Type of task.
    e. **Summary** - a descriptive statement about the event.

Review Migration Readiness

Use the information on the **Chats** tab to support your decision.

Property	Value	Description
Workflow	Discovered	On Demand has discovered the chat.
Account Matching	Completed	On Demand Migration for Accounts has migrated this user. This must be completed for On Demand to migrate chats for this user.
OneDrive Status	Completed	On Demand Migration for OneDrive has migrated files for this user. This must be completed for On Demand to migrate chats for this user. Note that you can migrate OneDrive file sharing permissions before or after the Chats migration (OneDrive Migration).

In addition to the data review, verify the following:

- The Azure AD administrator account that you will use to migrate Teams Chat should be granted the Teams license. You should not change your Azure AD administrator accounts before completing the migration project.
- The Azure AD administrator account should be granted the **Global Administrator** or **Teams Administrator** role on the tenants for which these account are used.

Considerations

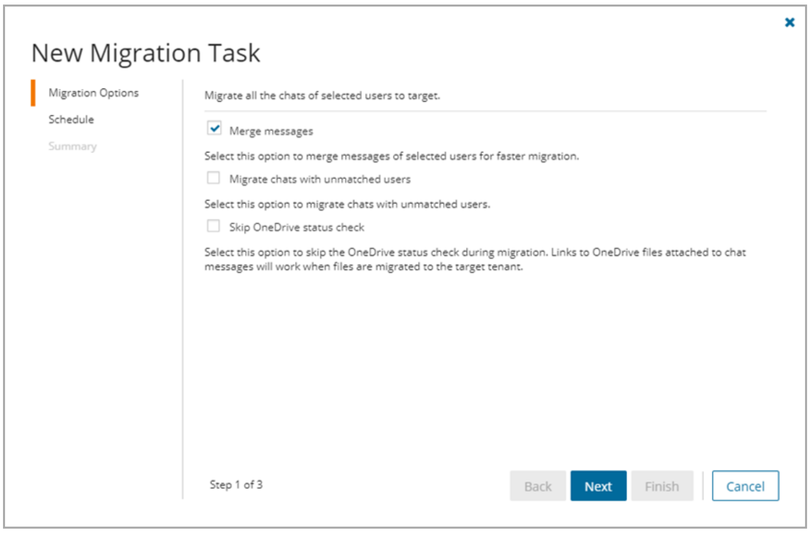
- It is a best practice to migrate Chats after all the content like OneDrive, Mail, SharePoint, Teams, etc., is migrated and the user accounts are matched.
- You must use dedicated Azure AD administrator accounts for migrating Chats. For more information, see Prerequisites and Azure AD administrator accounts.
- During migration, the migration task will migrate any new messages added to Chats after completing a Discovery task.
- When a migration completes successfully, you must remove the Azure AD administrator account from the target tenant. As a result:
    - You can migrate a Chat only once, and the Chat cannot be re-migrated.
    - You cannot migrate new messages added to the Chat in the source tenant after the migration.

Migrate Microsoft Chats

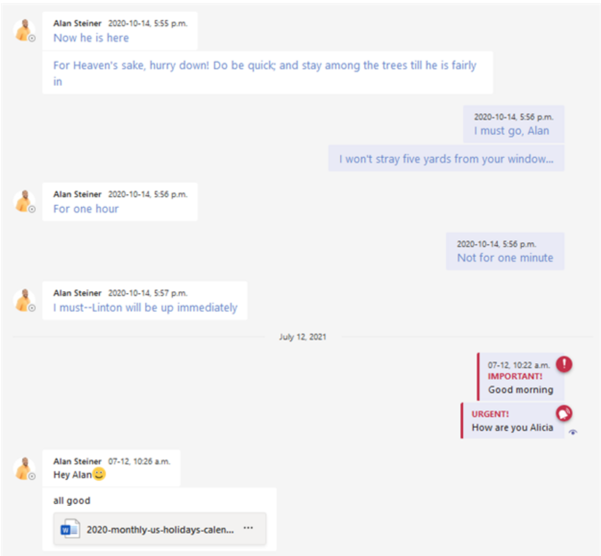
Microsoft Chats are migrated with the New Migration Task.

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migration** to open the *My Projects* list.
3. Create a new project or select an existing project.
4. Click **Teams** from the project tile. You can also click **Open Project** to open the project dashboard and then click **Open** from the OneDrive tile. The *Accounts and User Data* dashboard opens.
5. Select the **Teams** tab and then select the**Chats** tab.
6. From the local toolbar, select **Migrate**. The *New Migration Task* wizard opens.

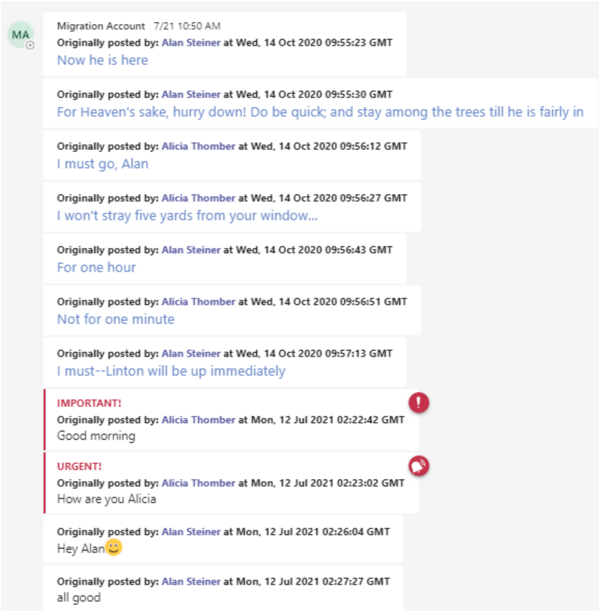
7. Step 1: **Migration Options**



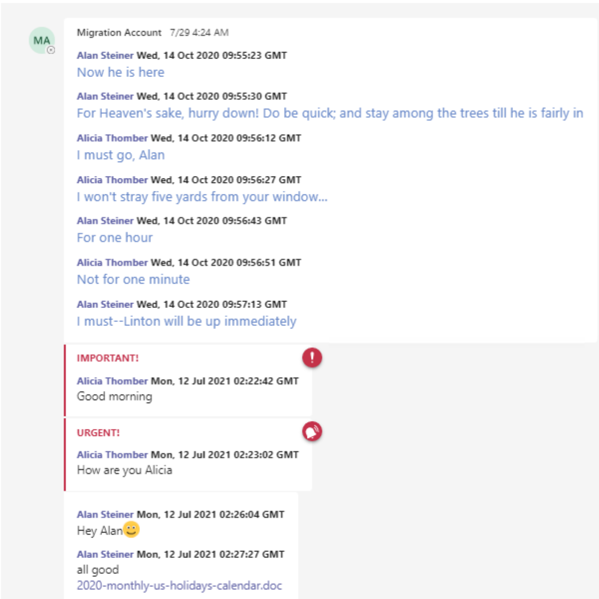
a. Select **Merge Messages** to merge message for faster migration. If you have a large number of messages, they are merged into manageable sets and then migrated.
Example: Consider a set of original messages in the source tenant as shown below:



When this message set is migrated without merging, it appears in the target tenant as shown below. Each message is a separate entity. Messages retain their chronological order and the time stamp is converted to GMT.



When the message set is merged and migrated, they appear in the target tenant as shown below. The migration service determines the merge set. Messages retain their chronological order and the time stamp is converted to GMT.



b. Select **Migrate chats with unmatched users** to ignore users in a chat that have not been mapped or matched with user accounts in the target tenant. The information about the user from the source tenant is used to migrate the chat.

For example, if John chats with Dave, and Dave's user account has not been migrated to the target tenant, then Dave will not be able to view his chats with John in the target tenant even if his user account is migrated to the target at a later time.

Use this option if there are user accounts in chat messages that are redundant because the user accounts will not been mapped, matched or migrated to the target account.

c. Select **Skip OneDrive status check** to ignore any verification of OneDrive accounts. Chat messages of users will be migrated regardless of their OneDrive status in the target tenant. Links to OneDrive files attached to chat messages will work when the OneDrive account has been migrated and the files are successfully migrated to the OneDrive account in the target tenant.

d. Click **Next**.

8. Step 2: **Schedule**

   a. Choose from one of three options to schedule the task. The scheduler will be activated only after you complete the task wizard.

      - **Run now** - the task will run immediately.
      - **Run later** - the task must be started manually.
      - **Schedule** - specify a future date and time to run the task.

   b. Click **Next**.

9. Step 3: **Summary**

   a. Note the name of the task. You will need the name of the task to track its progress and locate any issues.

   b. Click **Finish** to complete the task wizard. The task will start as scheduled.

Review the Migration Results

Once the migration task is complete, use the information on the **Chats** tab to verify the success of the migration.

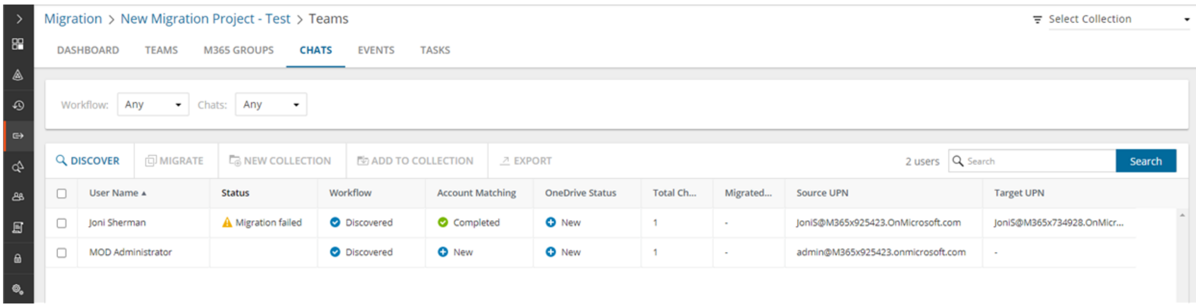
Property	Description
Workflow	When the migration task is complete the workflow value changes to • migrated - when all discovered chats have migrated. • partially migrated - when some chats failed to migrate. The number of migrated chats is fewer than the total number of chats.
Total Chats	The number of chats discovered for the user.
Migrated Chats	The number of chats migrated for the user. This may be fewer than the total number of chats. If a participant is not matched or OneDrive not migrated then migration of the chat is intentionally skipped and the event documented on the **Events** tab.

IMPORTANT: You must remove the Azure AD Administrator account that you used to migrate Chats. For more information about removing the account, see Finalizing the Migration.

Troubleshooting

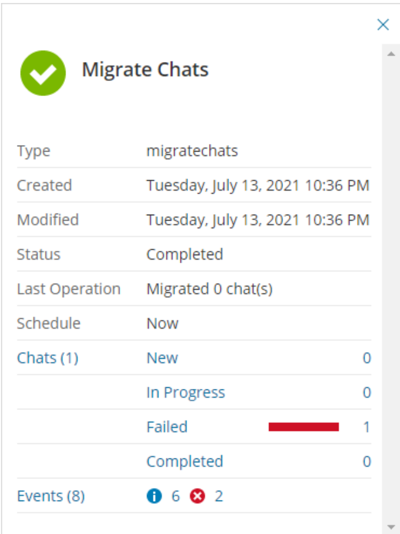
Chats may not be successfully migrated due to a variety of reasons. Two example are described below.

Example 1: Members of a chat have not been matched or migrated to the target tenant.



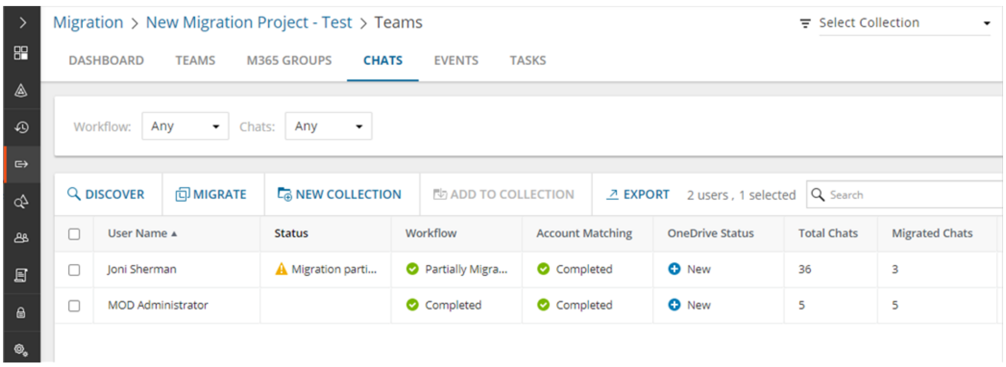
This is a common case where one or more members are not available in the target tenant. In such a case, the chat will not be migrated. In this example, the chat migration for Joni Sherman indicates a failure. The **Status** column indicates `Migration failed`. Joni has been chatting with the Administrator. However the Administrator account has not been matched or migrated to the target tenant.

When you inspect the migration task details, it will indicate a failure. You can click the event icons to get more information about the failure.



Resolution: When accounts are missing from the target tenant, you must map or migrate the account and re-run the chat migration task.

Example 2: An error in a chat message prevents all subsequent chat messages from being migrated.



In this example, chats for Joni Sherman indicate a migration problem. The **Status** column indicates `Migration partially failed`. There are 36 chat messages but only 3 messages could be migrated. The migration task completes successfully but no more messages are migrated. The service account that is used to migrate the chat remains as a member of the chat in the target tenant.

When you inspect the migration task, you will notice that the task has completed successfully, but there are error events in the task detail.

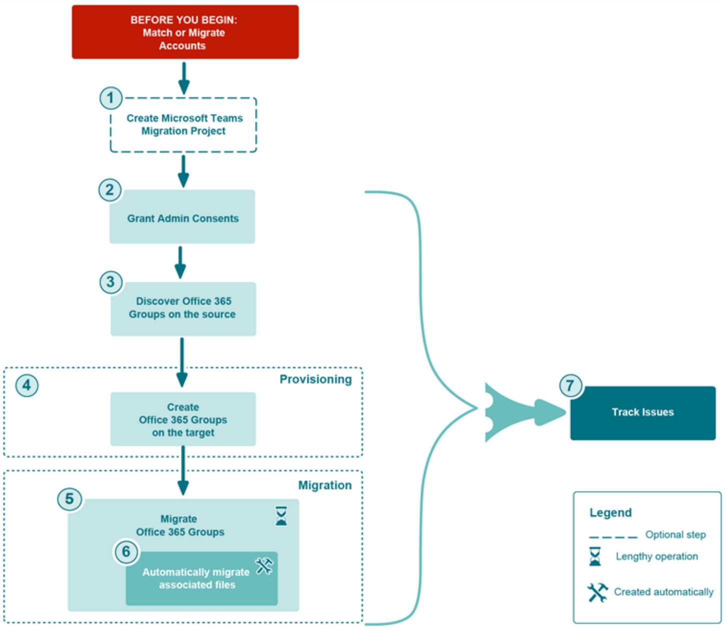
The Events list will indicate the error event, but more importantly you will notice that no more messages are migrated after the error event.

Resolution: Inspect the chat messages of the user and resolve the issue. Then re-run the migration task for the same user. If you are unable to address the issues with chat messages, contact Quest Technical Support.

Microsoft 365 Groups Migration

On Demand Migration for Teams securely migrates content for Microsoft 365 Groups without Teams functionality across Office 365 tenants. You can also use this dashboard for migration of Microsoft Teams and associated Microsoft 365 Groups migration (see Microsoft Teams Migration). Microsoft Teams migration requires additional licensing.

Basic Microsoft 365 Groups without Teams functionality content migration workflow consists of the following steps:



#	Step
1	Create Microsoft Teams migration project (created automatically with New Migration UI) Project Management
2	Grant necessary permissions in case these permissions are not already granted (Prerequisites)
3	Discover Microsoft 365 Groups without Teams functionality on the source tenant (Discovering Groups) There are no provision on the target on this step.
4	Provision groups on the target tenant. (Provisioning Groups) Target teams will be owned by the target Azure AD administrator account that is used to perform the provisioning. • Source Azure AD account will be added to all source Microsoft 365 Groups as a member

#	Step
	• Target Azure AD account will be added to all target Microsoft 365 Groups as a member and owner. These accounts can be removed from groups as described in Finalizing the Migration.
5	Migrate Microsoft 365 Groups without Teams functionality
6	Automatically migrate files associated with content All files associated with content are transferred to the target according to the options, selected in the migration task.
7	Monitor the progress and track issues (Event Management)

What We Migrate

The following content associated with Microsoft 365 Groups without Teams functionality can be migrated:

- Inbox folder and Calendar from the group mailbox (this content is always migrated, this option cannot be cleared)
- SharePoint site as a whole (this is optional)
- Planner (this is optional)
- Group settings

Limitations

- Office 365 group migration between tenants with different default language is not supported.
- Office 365 group cannot be migrated in case the target group already exists. For all such groups the **Target group exists** warning message is displayed in the grid. As a workaround, you can rename the source group and re-create migration project.

Prerequisites

Verify the following requirements are met before migrating Microsoft Teams. **If these actions are not performed, discovery, provision and migration tasks will fail or some data might be lost!**

- Consents are already granted for source and target tenants.
  The following consents should be granted before Teams migration feature can be used
  - Migration - Basic,
  - Migration - Mailbox Migration
  - Migration - SharePoint,
  - Migration - Teams.

TIP: If the admin consents are not granted or expired, **Discover Teams** action is disabled and the following notification is displayed: **Grant admin consent to the following Migration sub modules on the Tenants page for both source and target tenants: Basic, SharePoint, and Teams**. Open **Tenants** page and grant the necessary Required Consents and Permissions so that the product can access the source and target tenants. You will be redirected to the Microsoft web site for granting admin consent. Once admin consent is granted, you can start discovering Teams. On Demand for Migration uses the global administrator account to grant consent because the 'admin consent flow' which it uses requires it; read more about the admin consent flow experience.

- User must be matched or migrated before using the On Demand Migration for Teams service.
- Images, media files and documents referenced in one-on-one or group chats are stored in your OneDrive for Business folder. They must be migrated using the On Demand Migration for OneDrive service, before you migrate the chats.
- It is recommended to create or use dedicated (not added as owner or member to any team) source and the target Azure AD administrator accounts.

IMPORTANT: It is not recommended to use existing user accounts as source and target Azure AD administrator accounts, because it is recommended to remove them for safety reasons after the migration will be completed. These accounts can be removed from teams as described in Finalizing the Migration.

- Azure AD administrator accounts should have Teams license.
- It is not recommended that you change your Azure AD administrator accounts before completing the migration project.
- Azure AD administrator accounts should be granted the **Global Administrator** or **Teams Administrator** role on the tenants for which these account are used.
- Azure AD administrator accounts should be granted Application Impersonation role on the tenants for which these account are used.
- Accounts joined to existing teams should be matched or migrated in the migration project.

Required permissions

Feature	Required permissions
Migrate conversations	Read all channel messages
	Have full access to the Chat Service Aggregator
	Have full access to the Skype Teams Service
	Create chat and channel messages with anyone's identity and with any time stamp
Migrate private chats	Read all chat messages
	Read and write user chat messages
Provision groups and teams	Read and write directory data
	Read and write all groups
Migrate files and OneNote items	Read and write all OneNote notebooks

Feature	Required permissions
	Read and write items in all site collections
	View and modify notes for all users
Migrate groups and teams membership	Read all users' full profiles
	Read or write user region
	Add and remove members from all teams
	Add and remove members from all channels

Discovering Groups

In this topic:

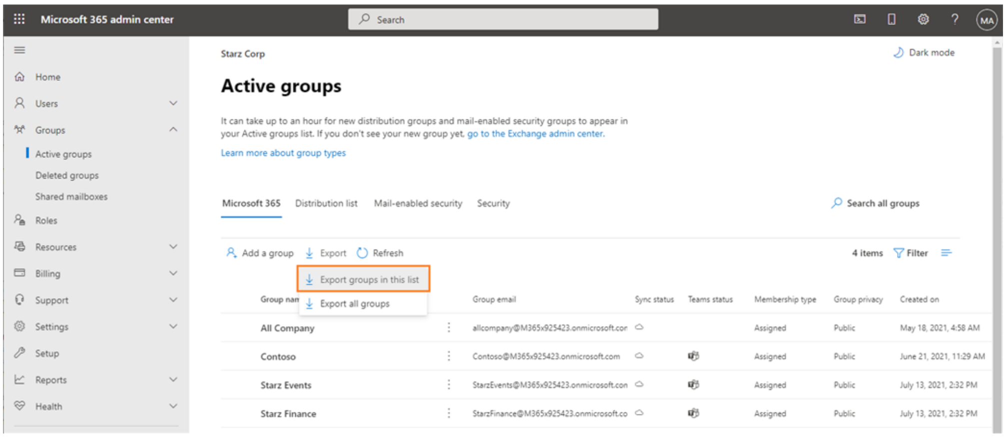
- Prepare a CSV file for discovering Groups
- Create and run a New Groups Discovery Task
- Review the New Groups Discovery Task
- Review the New Groups Discovery Task events
- Review the Collect Statistics Task
- Review the events for the Collect Statistics Task
- Review the statistics collected

Prepare a CSV file for discovering Groups

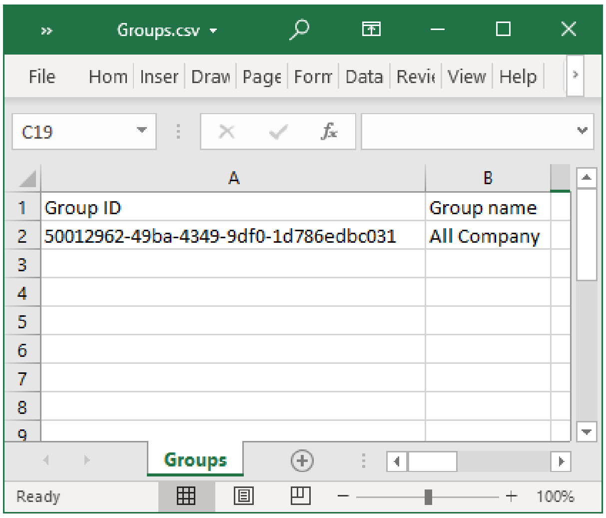
This step is required if you plan to discover Groups using a CSV file. When you have a large set of Groups but you want to discover a subset of those Groups, the CSV file lets specify the Groups that you want to discover and ignore the rest. You can then use this file in the New Groups Discovery Task as described in this topic to discover the Groups from the source tenant.

To prepare the CSV file:

1. Log in to the **Microsoft 365 admin center** (https://admin.microsoft.com) with the credentials of your source tenant administrator.
2. From the navigation pane, click **Active groups**.
3. Select the **Microsoft 365** tab in the *Active Groups* page.
4. Click **Export** and then click **Export groups in this list**. A *Groups.csv* file will be downloaded to your computer.



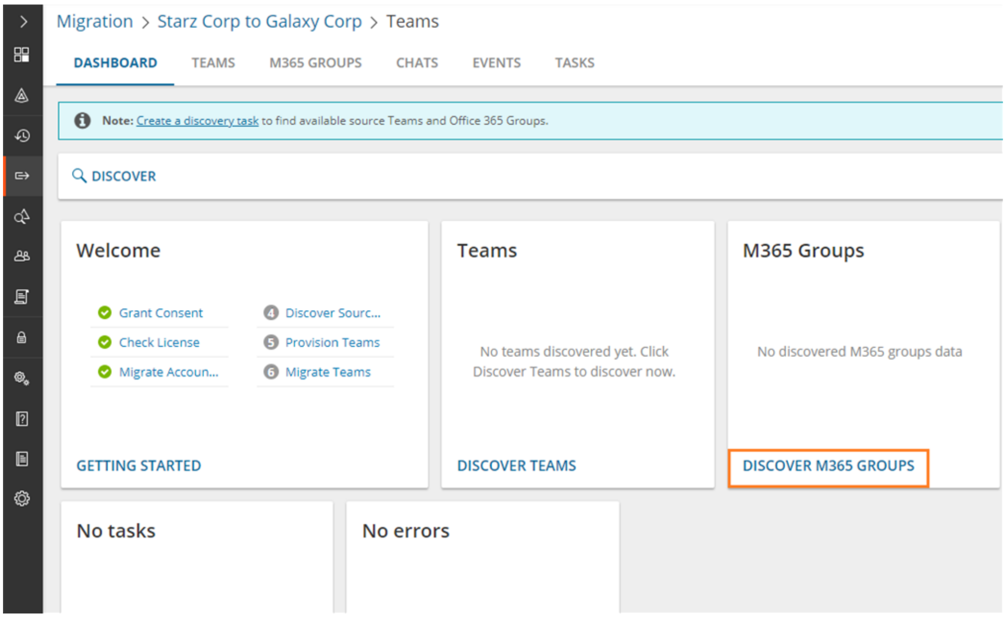
5. Edit the CSV and retain the groups you want to discover *that are not associated with Teams*and delete the rest. You can filter that data based on the *Has Teams* column to get a list of groups that are not associated with teams. If you retain a row that references a group associated with a team, the group will be ignored during discovery. Then retain the **Group ID** and **Group name** columns.



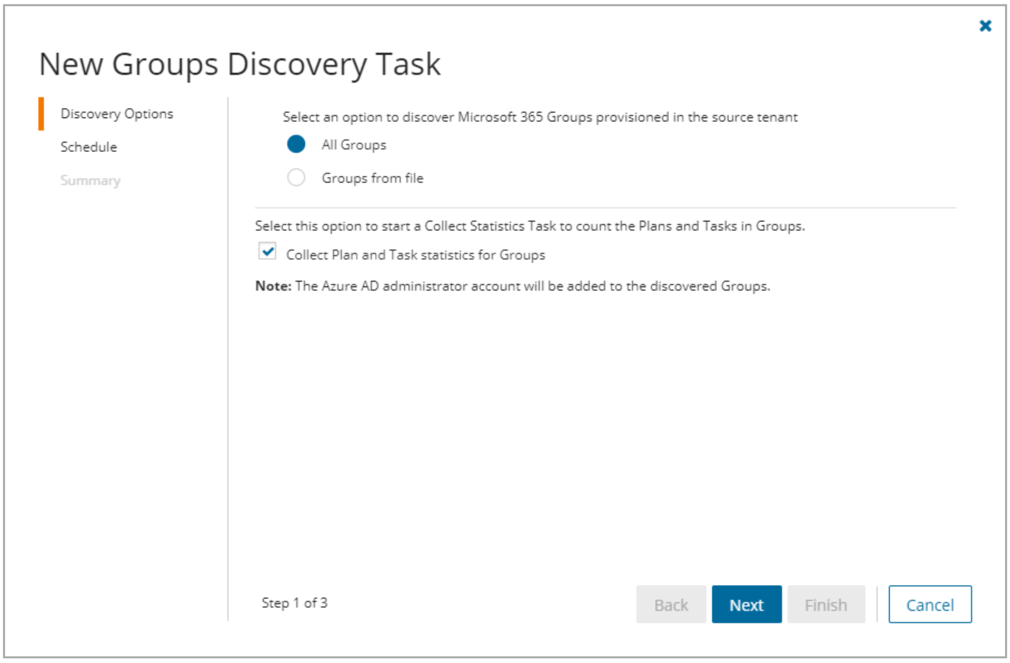
6. Save the CSV file. You may rename the file if needed.

Create and run a New Groups Discovery Task

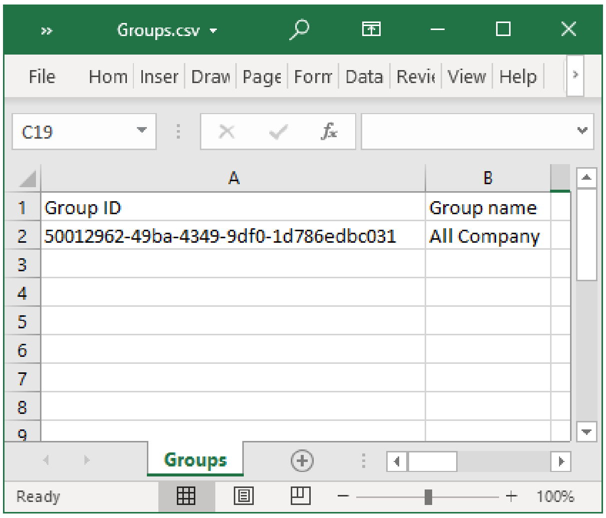
1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migration** to open the *My Projects* list.
3. Create a new project or select an existing project.
4. Click **Teams** from the project tiles. You can also click **Open Project** to open the project dashboard and then click **Open** from the Teams tile. The *Teams* dashboard opens.
5. Click **Discover M365 Groups** from the *Groups* tile in the Teams dashboard
   - or -
   Select the **M365 Groups** tab and select **List View** if not already selected. Then click **Discover** from the *Actions* ribbon.



6. The *New Groups Discovery Task* wizard opens.
7. Step 1: **Discovery Options**



   a. **All Groups** - select this option to discover all Groups from the source tenant.
   b. **Groups from file** - select this option to discover Groups referenced in a CSV file. Choose this option when you want to discover a subset of the Microsoft Groups in the source tenant.
      Then click **Browse** and select the CSV that contains the Group IDs and Group names of the Groups that you want to discover.



c. **Collect Plan and Task statistics for Groups** - Select this option to start a **Collect Statistics Task** to count the number of Plans and Tasks in Groups.

> **NOTE:** When a **Collect Statistics Task** is started, the Azure AD administrator for the source tenant will be added to all groups, or the groups specified in a CSV file. The additional information collected by the tasks are used in the migration process for teams and groups, and helps improve the performance of the migration task.

d. Click **Next**.

8. Step 2: **Schedule**

   a. Choose from one of three options to schedule the task. The scheduler will be activated only after you complete the task wizard.

      - **Run now** - the task will run immediately.
      - **Run later** - the task must be started manually.
      - **Schedule** - specify a future date and time to run the task.

   b. Click **Next**.

9. Step 3: **Summary**

   a. Verify the task specifications as described below:

      i. **Name** - name of the task. You can specify a custom name.

      ii. **Source tenant** - name of the tenant where the statistics will be collected.

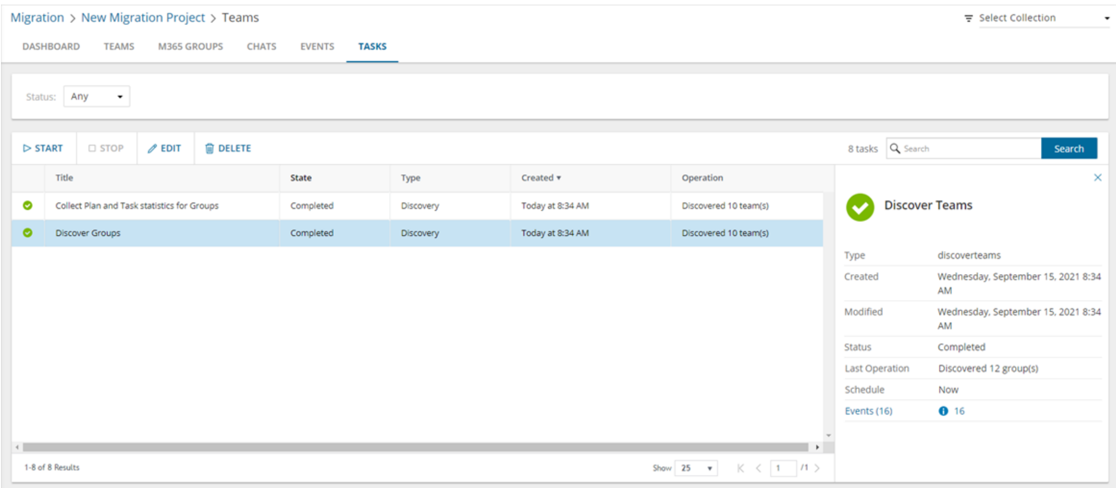
      iii. **Target tenant** - name of the target tenant in this project.

      iv. **Scheduled start** - date and time when the task will start. Now indicates that the task will start immediately.

   b. Click **Back** to revise or review a previous step or click **Finish** to complete the task wizard and start the task as scheduled.

Review the New Groups Discovery Task

1. Select the **Tasks** tab.
2. Select the task that you want to review. The default name is `Discover`.
3. In the task details pane that opens, the information presented is as described below:
    a. **Type** - Type of the task. The type is `discovergroups`.
    b. **Created** - Date and time when the task was created.
    c. **Modified** - Date and time when the task was last updated.
    d. **Status** - State of the task.
    e. **Last Operation** - The action that was most recently performed in this task.
    f. **Schedule** - Date and time when the task started. Now indicates that the task started immediately after the task was created.
    g. **Events (*number*)** - Number indicates the count of events that the task encountered. The values indicate the type of the events and the event count for each type.



4. If you selected the option to collect statistics in the *New Groups Discovery Task* wizard, you will see and additional task for *Collect Plan and Task statistics for Groups*. Click the task to view the corresponding details in the details pane.

Review the New Groups Discovery Task Events

1. Select the **Tasks** tab.
2. Select the task that you want to review.
3. In the task details pane that opens, click **Events (*number*)**. The *Events* tab opens with a filtered list of events for the selected task.
4. Select an event that you want to review. In the event details pane that opens, the information presented is as described below:

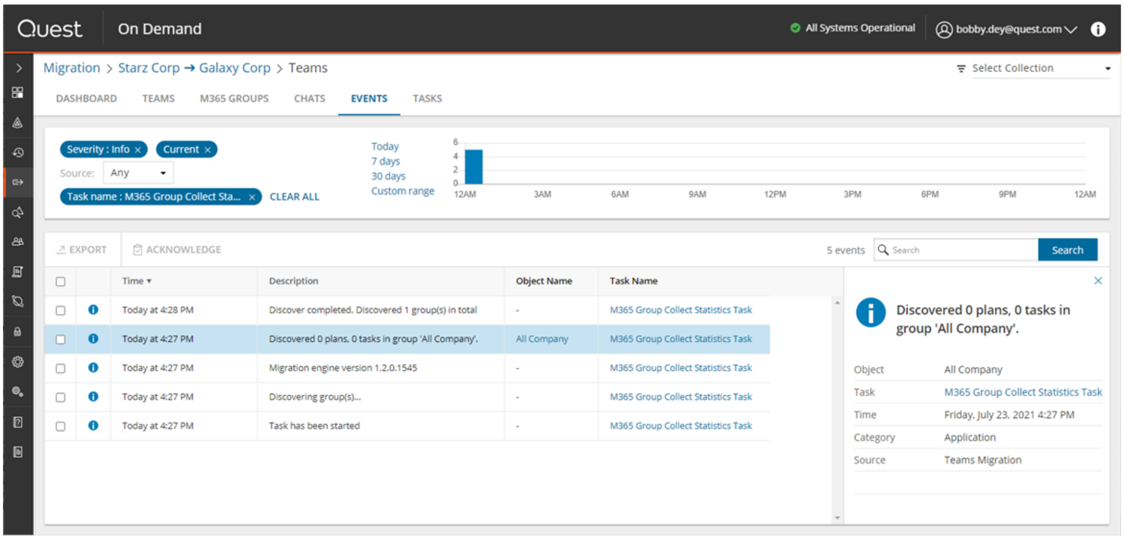
a. **Object** - Name of the group.

b. **Task** - Name of the task.

c. **Time** - Date and time when the event occurred.

d. **Category** - Type of task. the value is `Application`.

e. **Source** - Name of the On Demand Migration service.



Review the Collect Statistics Task

1. Select the **Tasks** tab.
2. Select the task that you want to review. The default name is `M365 Group Collect Statistics Task`.
3. In the task details pane that opens, the information presented is as described below:
   a. **Type** - Type of the task. The type is `discovergroups`.
   b. **Created** - Date and time when the task was created.
   c. **Modified** - Date and time when the task was last updated.
   d. **Status** - State of the task.
   e. **Last Operation** - The action that was most recently performed in this task.
   f. **Schedule** - Date and time when the task started. `Now` indicates that the task started immediately after the task was created.
   g. **Events (*number*)** - The number of events that the task encountered.

Review the events for the Collect Statistics Task

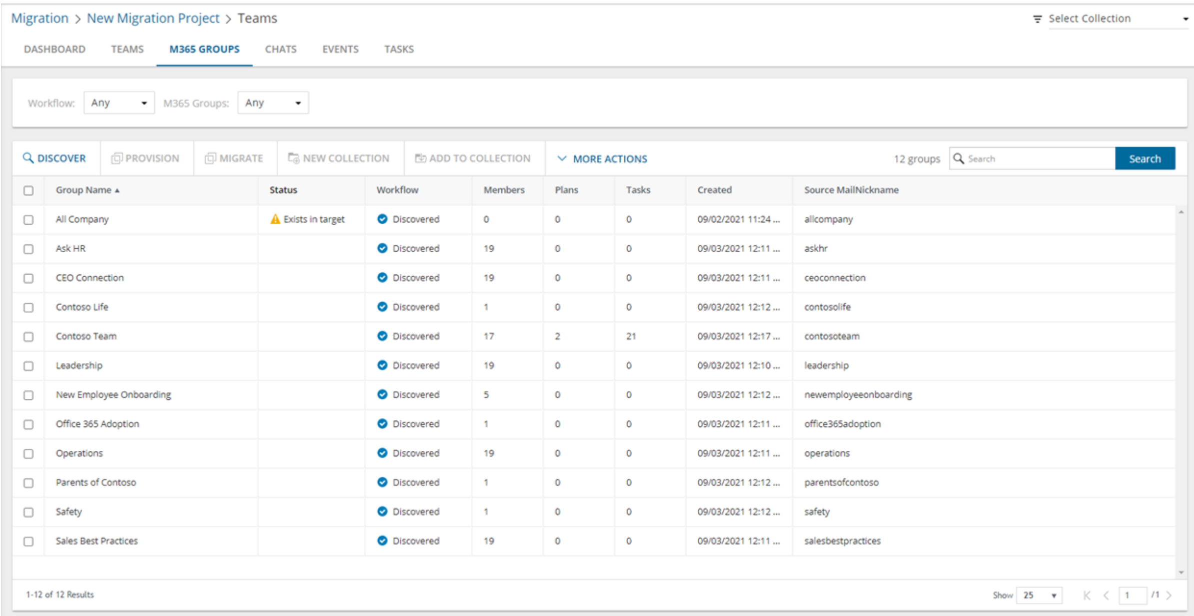
1. Select the **Tasks** tab.
2. Select the Collect Statistics Task that you want to review.

3. In the task details pane that opens, click **Events (*number*)**. The *Events* tab opens with a filtered list of events for the selected task.
4. Select an event that you want to review. In the event details pane that opens, the information presented is as described below:
   a. **Object** - Name of the group.
   b. **Task** - Name of the task.
   c. **Time** - Date and time when the event occurred.
   d. **Category** - Type of task. the value is `Application`.
   e. **Source** - Name of the On Demand Migration service

Review the statistics collected

Statistics are collected if the option to collect statistics is selected in the New Groups Discovery Task.

1. From the Teams dashboard, click the **Teams** tile.
2. Select the **M365 Groups** tab and select **List View** if not already selected.



The columns are as described below:

Group Name - Name of the group in the source tenant.

Status - Status of the task in the migration process. If the group in the source tenant exists in the target tenant, the value `Exists in target` is displayed.

Workflow - The stage of group in the migration process. Value should be `Discovered`.

Channels - Number of channels in the group.

Members - Number of members in the group.

Plans - Number of plans in the group.

Tasks - Number of tasks in the group.

Created - Date and time when the group task was created.

Source MailNickname: The mail nickname of the group in the source tenant.

Discovering Teams and Groups

Every team is associated with a Microsoft 365 Group, but there are groups that are not associated with teams. In this topic, the term **team** means a Microsoft Team and includes its associated group, and the term **group** means a Microsoft 365 Group that is not associated with a team.

> **NOTE:** This topic explains the process to discover both teams and groups. If you want to discover only teams, see Discovering Teams. If you want to discover only groups that are not related to teams, see Discovering Groups.

In this topic:

- Prepare a CSV file for discovering Teams & Groups
- Create and run a New Teams & Groups Discovery Task
- Review the New Teams & Groups Discovery Task
- Review the New Teams & Groups Discovery Task events
- Review the Collect Statistics Task
- Review the events for the Collect Statistics Task
- Review the statistics collected

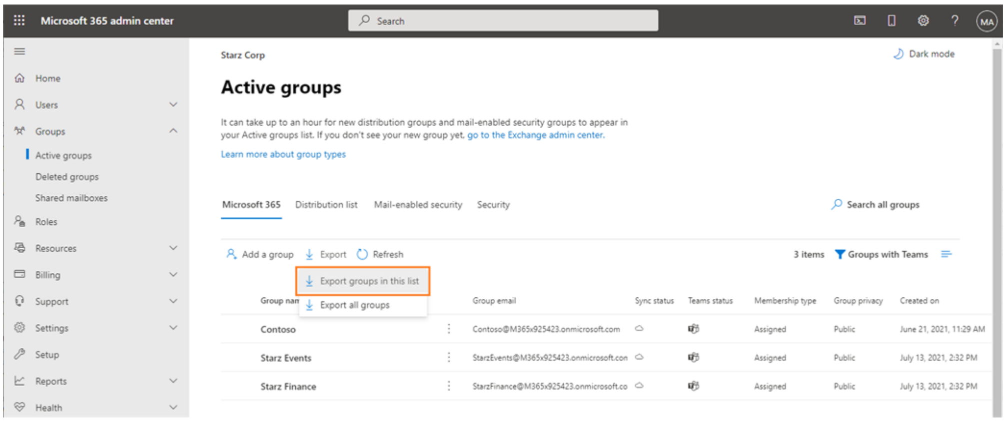
Prepare a CSV file for discovering Teams & Groups

This step is required if you plan to discover teams and groups using a CSV file. When you have a large set of teams and groups but you want to migrate a subset of the objects, the CSV file lets you specify the teams and groups that you want to discover and ignore the rest. You can then use this file in the New Teams & Groups Discovery Task as described in this topic to discover the teams from the source tenant.

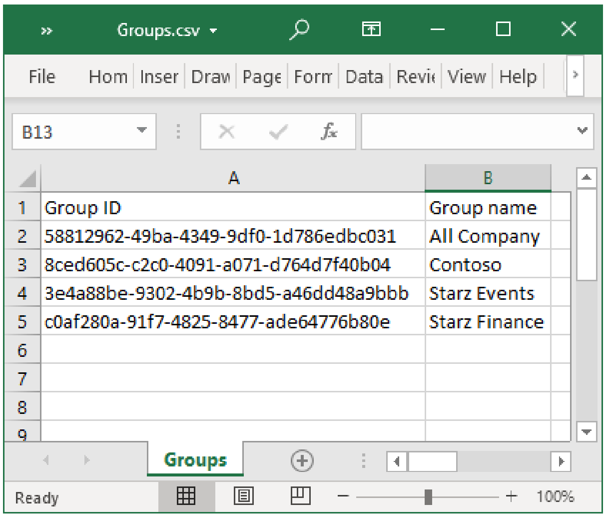
To prepare the CSV file:

1. Log in to the **Microsoft 365 admin center** (https://admin.microsoft.com) with the credentials of your source tenant administrator.
2. From the navigation pane, click **Active groups**.
3. Select **Microsoft 365** tab in the *Active Groups* page

4. Click **Export** and then click **Export all groups**. A *Groups.csv* file will be downloaded to your computer.



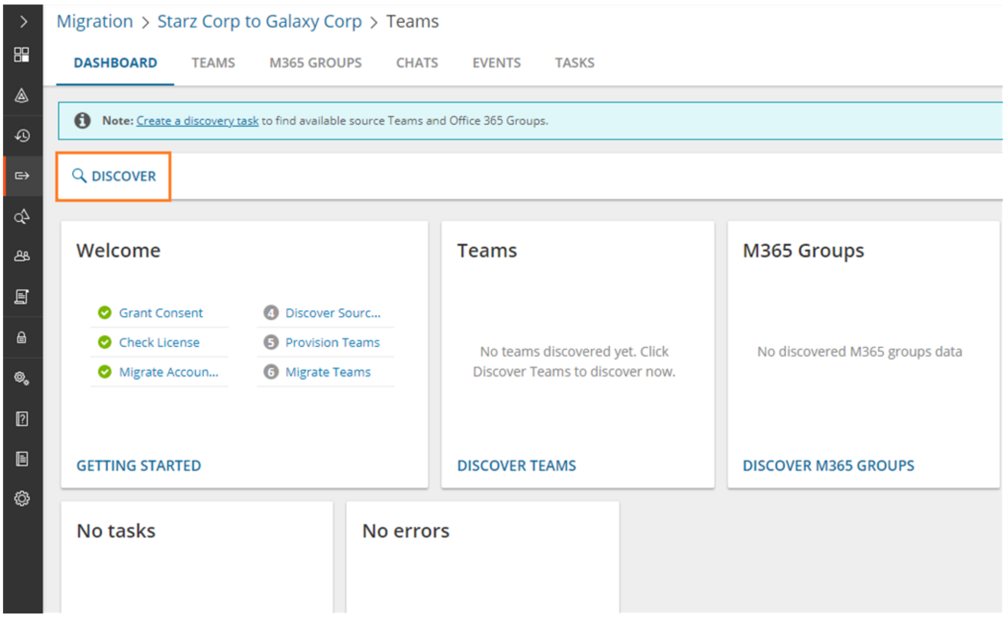
5. Edit the CSV file and retain the **Group ID** and **Group name** columns. Then retain the teams and groups you want to discover and delete the rest.



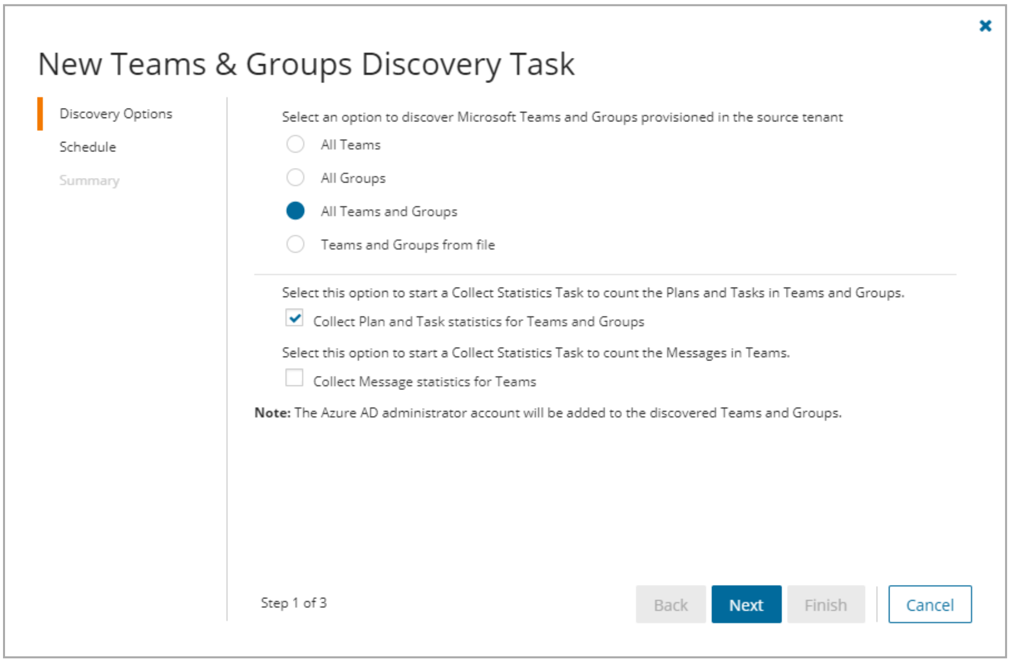
6. Save the CSV file. You may rename the file if needed.

Create and run a New Teams & Groups Discovery Task

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migration** to open the *My Projects* list.
3. Create a new project or select an existing project.
4. Click **Teams** from the project tiles. You can also click **Open Project** to open the project dashboard and then click **Open** from the Teams tile. The *Teams* dashboard opens.
5. Click **Discover** from the Teams dashboard or click the **Create a discovery task** link in the information panel.

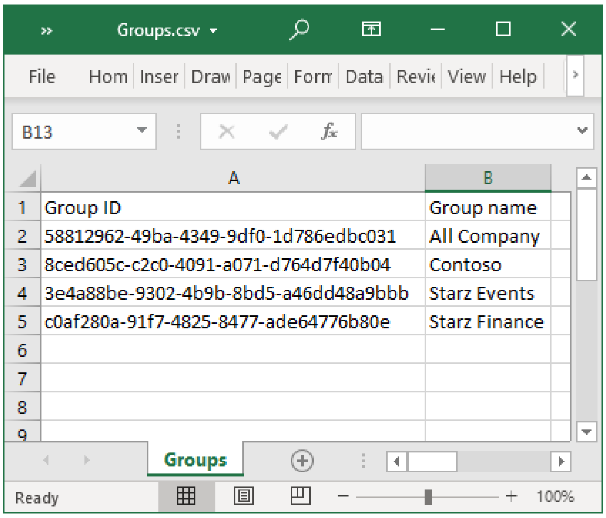


6. The *New Teams & Groups Discovery Task* wizard opens.
7. Step 1: **Discovery Options**



   a. **All Teams** - select this option to discover all Microsoft Teams.
   b. **All Groups** - select this option to discover all Microsoft 365 Groups without Teams.
   c. **All Teams and Groups** - select this option to discover Microsoft 365 Groups and Teams.
   d. **Teams and Groups from file** - select this option to discover Microsoft 365 Groups and Teams referenced in a CSV file when you want to discover a subset of all the Microsoft Teams and Groups in the source tenant.

Then click **Browse** and select the CSV that contains the Group IDs and Group names of the teams that you want to discover.



e. **Collect Plan and Task statistics for Teams** - Select this option to start a **Collect Statistics Task** to count the number of Plans and Tasks in Teams. This option is available when the **All Teams** option is selected.

f. **Collect Message statistics for Teams** - Select this option to start a **Collect Statistics Task** to count the number of messages in Teams. This option is available when the **All Teams**, **All Teams and Groups** or **Teams and Groups from file** option is selected.

g. **Collect Plan and Task statistics for Groups** - Select this option to start a **Collect Statistics Task** to count the number of Plans and Tasks in Microsoft 365 Groups. This option is available when the **All Groups** option is selected.

h. **Collect Plan and Task statistics for Teams and Groups** - Select this option to start a **Collect Statistics Task** to collect additional information about Teams and Microsoft 365 Groups. This option is available when either the **All Teams and Groups** or **Teams and Groups from file** option is selected.

   NOTE: When a **Collect Statistics Task** is started, the Azure AD administrator for the source tenant will be added to all teams, all groups or the teams and groups specified in a CSV file. The additional information collected by the tasks are used in the migration process for groups and helps improve the performance of the migration tasks.

i. Click **Next**.

8. Step 2: **Schedule**

   a. Choose from one of three options to schedule the task. The scheduler will be activated only after you complete the task wizard.

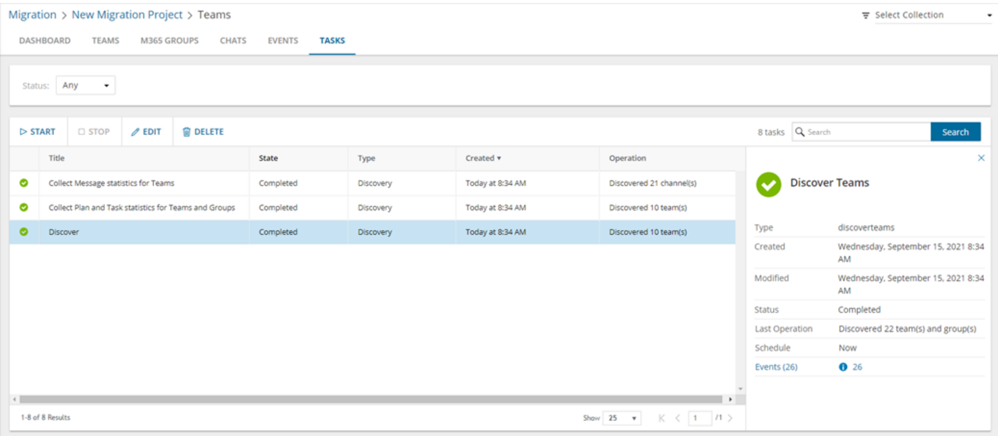
      - **Run now** - the task will run immediately.
      - **Run later** - the task must be started manually.
      - **Schedule** - specify a future date and time to run the task.

   b. Click **Next**.

9. Step 3: **Summary**
   a. Verify the task specifications as described below:
      i. **Name** - name of the task. You can specify a custom name.
      ii. **Source tenant** - name of the tenant where the statistics will be collected.
      iii. **Target tenant** - name of the target tenant in this project.
      iv. **Scheduled start** - date and time when the task will start. Now indicates that the task will start immediately.
   b. Click **Back** to revise or review a previous step or click **Finish** to complete the task wizard and start the task as scheduled.

Review the New Teams & Groups Discovery Task

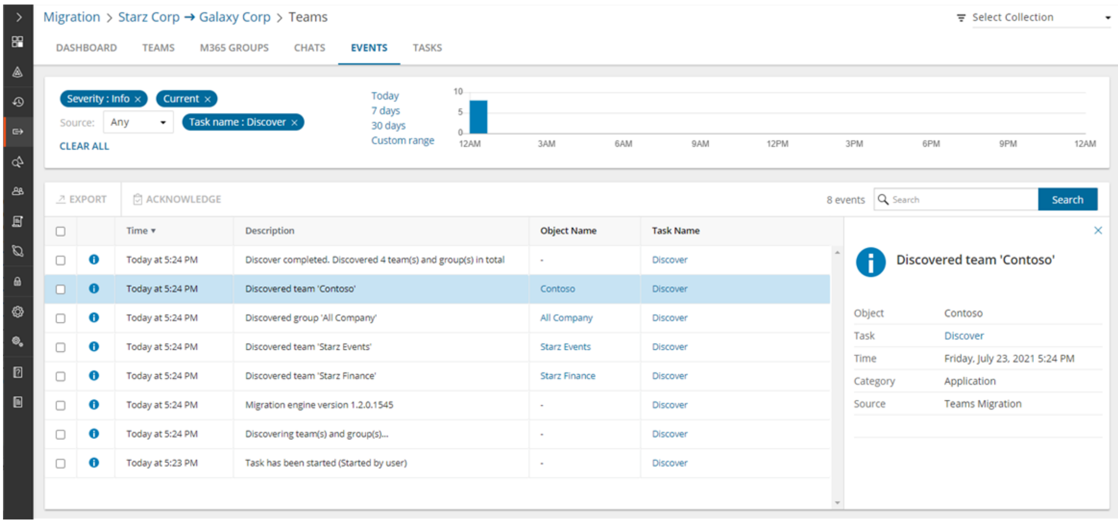
1. Select the **Tasks** tab.
2. Select the task that you want to review. The default name is `Discover`.
3. In the task details pane that opens, the information presented is as described below:
   a. **Type** - Type of the task. The type is `discoverteams`.
   b. **Created** - Date and time when the task was created.
   c. **Modified** - Date and time when the task was last updated.
   d. **Status** - State of the task.
   e. **Last Operation** - The action that was most recently performed in this task.
   f. **Schedule** - Date and time when the task started. Now indicates that the task started immediately after the task was created.
   g. **Events (*number*)** - Number indicates the count of events that the task encountered. The values indicate the type of the events and the event count for each type.



4. If you select the options to collect statistics in the *New Teams & Groups Discovery Task* wizard, you will see additional tasks: *Collect Plan and Task statistics for Teams and Groups* and *Collect Message statistics for Teams*. Click each task to view the corresponding details in the details pane.

Review the New Teams & Groups Discovery Task Events

1. Select the **Tasks** tab.
2. Select the task that you want to review.
3. In the task details pane that opens, click **Events (***number***)**. The *Events* tab opens with a filtered list of events for the selected task.
4. Select an event that you want to review. In the event details pane that opens, the information presented is as described below:
    a. **Object** - Name of the team or group discovered.
    b. **Task** - Name of the task.
    c. **Time** - Date and time when the event occurred.
    d. **Category** - Type of task. the value is `Application`.
    e. **Source** - Name of the On Demand Migration service



Review the Collect Statistics Task

1. Select the **Tasks** tab.
2. Select the Collect Statistics Task that you want to review. The default name is `Discover`.
3. In the task details pane that opens, the information presented is as described below:
    a. **Type** - Type of the task. The type is `discoverteams`.
    b. **Created** - Date and time when the task was created.
    c. **Modified** - Date and time when the task was last updated.
    d. **Status** - State of the task.
    e. **Last Operation** - The action that was most recently performed in this task.
    f. **Schedule** - Date and time when the task started. `Now` indicates that the task started immediately

after the task was created.

g. **Events (*number*)** - The number of events that the task encountered.

Review the events for the Collect Statistics Task

1. Select the **Tasks** tab.
2. Select the Collect Statistics Task that you want to review.
3. In the task details pane that opens, click **Events (*number*)**. The *Events* tab opens with a filtered list of events for the selected task.
4. Select an event that you want to review. In the event details pane that opens, the information presented is as described below:
    a. **Object** - Name of the team or group.
    b. **Task** - Name of the task.
    c. **Time** - Date and time when the event occurred.
    d. **Category** - Type of task. the value is `Application`.
    e. **Source** - Name of the On Demand Migration service

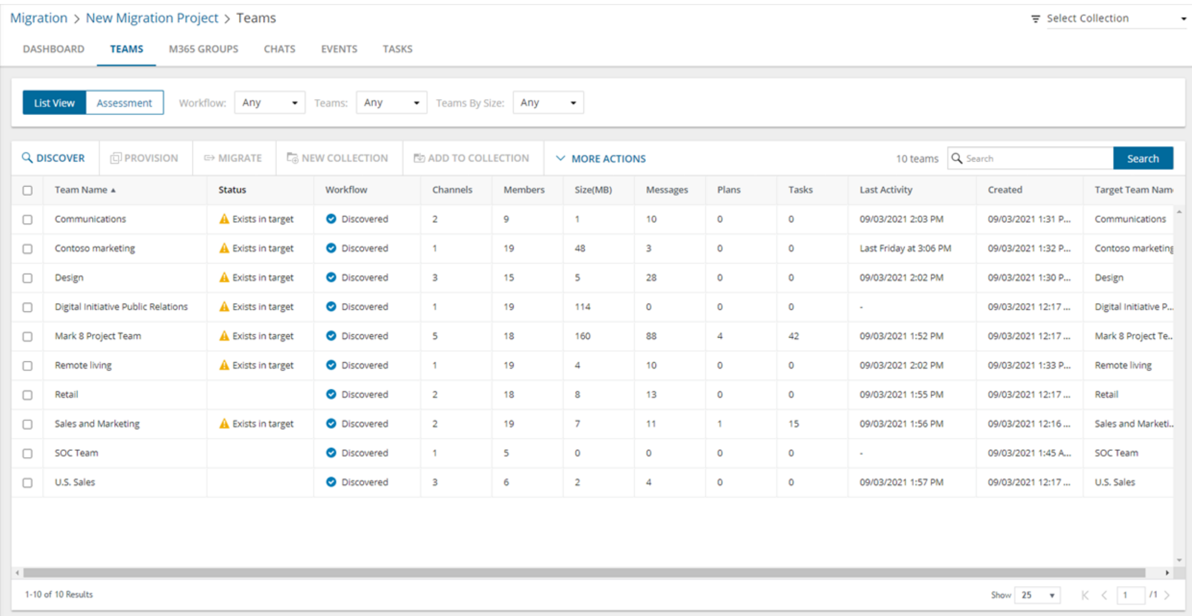
Review the statistics collected

Statistics are collected if the option to collect statistics is selected in the New Teams & Groups Discovery Task. Statistics are collected for teams and groups.

To review the statistics for teams:

From the Team dashboard, click the **Teams** tile.

NOTE: Each team is associated with a Microsoft 365 group. These groups are not listed in the M365 Groups list.



The columns are as described below:

Team Name - Name of the team in the source tenant.

Status - Status of the task in the migration process. For example, after a discovery task, if the team in the source tenant exists in the target tenant, the value `Exists in target` is displayed.

Workflow - The stage of the team in the migration process. Value should be: `Discovered`.

Channels - Number of channels in the team

Members - Number of members in the team

Size (MB) - Total size of files in a team

Messages - Total number of messages across all channels of the team

Plans - Number of Planner plans in the team

Tasks - Number of Planner tasks across all plans in the team

Last Activity - The most recent activity time for the team in the source tenant

Created - Date and time when the team record was created in On Demand Migration

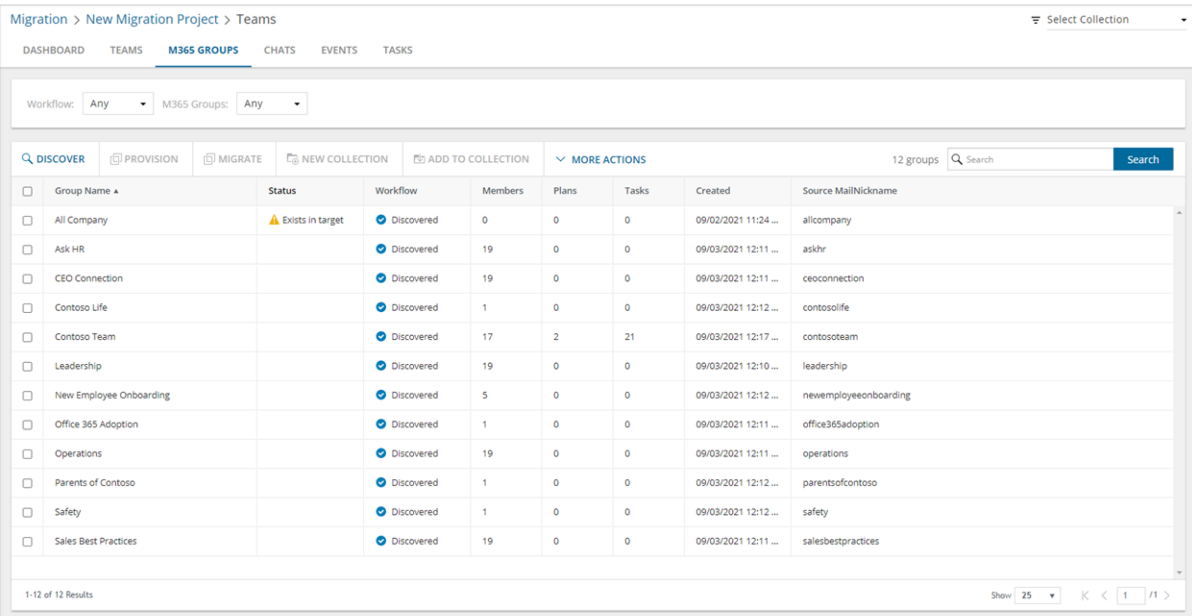
Target Team Name - Name of the corresponding team in the target tenant if it exists.

Source MailNickname: The mail nickname of the team in the source tenant

To review the statistics for groups:

From the Teams dashboard, click the **M365 Groups** tile.

> **NOTE:** The M365 Groups list displays groups that are not associated with teams.



The columns are as described below:

Group Name - Name of the group in the source tenant.

Status - Status of the task in the migration process. If the group in the source tenant exists in the target tenant, the value `Exists in target` is displayed.

Workflow - The stage of the group in the migration process. Values are: `Discovered`, `Provisioned` and `Migrated`

Members - Number of members in the group

Plans - Number of Planner plans in the group

Tasks - Number of Planner tasks across all plans in the group

Created - Date and time when the team record was created in On Demand Migration

Source MailNickname: The mail nickname of the team in the source tenant

Provisioning Groups

After all source Microsoft 365 Groups without Teams functionality are discovered you can start to provision groups on the target tenant.

Make sure that all associated accounts are matched or migrated in account migration project and create the Provision task:

1. Go to the main migration project **Dashboard** in case you use new migration UI. In case you are using classic experience or you are already on the Teams migration Dashboard, go to step 3.
2. Click **M365Groups** widget.
3. Select the Microsoft 365 Groups to be provisioned on the target. Provisioned groups will be owned by target Azure AD administrator account and with account matched with source group owner in case this account exists. The target Azure AD administrator account also will be added to the provisioned group as a member along with the members matched with source group members. In case any matched account cannot be found on the target, this account cannot be processed and related event will be reported.

> **TIP:** Use Searching and Filtering to quickly navigate through the list of groups.

4. Click **Provision**.
5. Select whether automatic Group Welcome Message will be suppressed to avoid disturbing users by automatic Microsoft messages about adding to the provisioned groups. However, suppressing these messages results in performance degradation due to issues with Microsoft's synchronization behavior. We recommend do not suppress these messages to avoid issues related to synchronization.
6. Schedule when the task will be started. See Task Scheduling for details.
7. Click **Next** to view the task summary. Name the task and check selected options. Click **Finish** to save or start the task depending on schedule option selected.

The provision task is created. You can track its progress in the **Tasks**, view the summary on the Dashboard or monitor alerts and notifications in the **Events**.

Migrating Groups and Associated Content

1. Go to the main migration project **Dashboard** in case you use new migration UI. In case you are using classic experience or you are already on the Teams migration Dashboard, go to step 3.
2. Click **Teams** widget.

3. Open **M365Groups** and select the groups with **provisioned** state you want to migrate (Provisioning Teams for Target Tenant). Migration will be skipped for all groups that are not yet provisioned

TIP: Use Searching and Filtering to quickly navigate through the list of groups.

4. Click **Migrate**. Group Mailbox and Calendar will always be migrated. This option cannot be cleared.
5. Select whether to migrate associated SharePoint sites including all related content..
6. Select whether to migrate Planner including all related content. This option is selected by default.
7. Schedule when the task will be started. See Task Scheduling for details.
8. Click **Next** to view the task summary. Name the task and check selected options. Click **Finish** to save or start the task depending on schedule option selected.

The migration task is created. Consider, additional content migration task will be also created automatically to transfer all associated content. You can track its progress in the **Tasks**, view the summary on the Dashboard or monitor alerts and notifications in the **Events**.

Troubleshooting

Before you contact Quest support is recommended to prepare organization ID, project ID and task ID

To find Task ID and Project ID

In **Events** grid right click task link in **Task Name** column and select **Copy link address**. Copied link contains the Task ID and the Project ID.

To find organization ID

If you are trying to find an existing On Demand organization ID that another users have created, make sure that they have added your email address under Access Control > Administrators.

1. In case you are Administrator of the organization, click your account in top right corner to open the account related menu.
2. Click the organization name. You can see Organization ID in **Manage Organization** dialog.

Special Cases

Table 1: Special Cases

Feature	Event	Root cause	Workaround

Microsoft Teams Migration	Cannot find the group '{Group ID}' on the source. Try to check whether the group exists using PowerShell cmdlet 'Get-UnifiedGroup' as described in the documentation	Group associated with the team not found	Use the following PowerShell script and the group ID provided by the error message to get the group name:
			`Install-Module PowerShellGet -Force Install-Module -Name ExchangeOnlineManagement`
			`$UserCredential = Get-Credential`
			`Connect-ExchangeOnline -Credential $UserCredential`
			`Get-UnifiedGroup -Identity "b1552bc6-f932-4ac9-a4f2-24a5d2da2eed" | Format-List DisplayName,Id`
			If this is a source group, fix your source data before proceed for migration.
			If this is a target group, check if this group exists in target. If this group exists, please contact our support. If this group doesn't exist, remove this group associated team from target, and re-run provision and migration.

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Finalizing the Migration

Congratulations! The migration is complete.

If you have created a temporary account for the migration (as recommended in Before you Start section), it is time to remove it. This account has elevated permissions, so it might pose security risks.

Microsoft Teams Migration

Azure Ad administrator accounts added to all source and target teams respectively as members or owners ,can now be removed. For instruction on how to remove this temporary account See the following Microsoft documentation. Suggested `Remove-TeamUser` command removes an owner or member from a team, and from the unified group which backs the team.

IMPORTANT: The `Remove-TeamUser` command will return immediately, but the Teams application will not reflect the update immediately. The Teams application may need to be open for up to an hour before changes are reflected.

Removing administrator account from Teams

To remove Azure AD administrator account from the teams and groups use the following script:

- Remove-Migration-Account-From-Teams

IMPORTANT: To execute this script the **Global Administrator**role is required for the source tenant. You will be prompted to provide global administrator account credentials to perform this procedure.

This script can be downloaded here:

https://support.quest.com/on-demand-migration/kb/320327

About us

Quest creates software solutions that make the benefits of new technology real in an increasingly complex IT landscape. From database and systems management, to Active Directory and Office 365 management, and cyber-security resilience, Quest helps customers solve their next IT challenge now. Around the globe, more than 130,000 companies and 95% of the Fortune 500 count on Quest to deliver proactive management and monitoring for the next enterprise initiative, find the next solution for complex Microsoft challenges and stay ahead of the next threat. Quest Software. Where next meets now. For more information, visit www.quest.com.

Technical support resources

Technical support is available to Quest customers with a valid maintenance contract and customers who have trial versions. You can access the Quest Support Portal at https://support.quest.com.

The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. The Support Portal enables you to:

- Submit and manage a Service Request
- View Knowledge Base articles
- Sign up for product notifications
- Download software and technical documentation
- View how-to-videos
- Engage in community discussions
- Chat with support engineers online
- View services to assist you with your product