



Quest® On Demand Migration

## **User Guide**



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#### **Legend**

 **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.

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# About On Demand Migration

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

## Accounts and User Data Migration

### Account migration

- Analyze the structure of your Microsoft Azure Active Directory and get reports on the problems that might adversely affect the migration.
- Migrate users, groups, and the related information between tenants.
- Migrate hybrid accounts synchronized with on-premises AD
- 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 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.

### Power BI

- Analyze Power BI content on your source tenant
- Assign Connection Profiles
- Match Gateways
- Migrate Connections
- Migrate Workspaces
- Provide robust Power BI 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 must sign up for the Quest On Demand service.

1. Go to the web page [quest-on-demand](#).
2. On the Welcome to Quest On Demand page, click **Sign in with Microsoft**. See [Signing in to On Demand](#) for more information.



#### **NOTE: Signing in using your Microsoft MFA-enabled account**

If your organization requires multi-factor authentication and you receive an authorization error, your conditional access policy may not be configured correctly. You can take one of two actions:

- Contact your IT administrator to deactivate MFA during migrations.
- Contact "Azure Identity" support for help with configuring conditional access policies.

3. Accept the Software Transaction Agreement before using this product.
4. As part of the login process with Microsoft Entra ID, you must consent to the set of minimal permissions required by the Quest On Demand application.
5. Create an organization. See [Creating an organization](#) for detailed steps.

# Product Licensing

**i** | **IMPORTANT:** Your Azure subscription must have an E3 or E5 enterprise plan. For more information see [Microsoft 365 Enterprise plans](#).

Use of this software is governed by the Software Transaction Agreement found at [www.quest.com/legal/sta.aspx](http://www.quest.com/legal/sta.aspx) and the SaaS Addendum at [www.quest.com/legal/saas-addendum.aspx](http://www.quest.com/legal/saas-addendum.aspx). This software does not require an activation or license key to operate.

Trial subscriptions are available. Visit Quest® On Demand Migration page for more information and pricing: <https://www.quest.com/products/on-demand-migration/>

In this topic:

- [Starting a trial subscription](#)
- [Purchasing a commercial subscription](#)
- [Viewing the license report](#)
- [Exporting licenses consumption data](#)
- [Searching for licenses consumed](#)
- [Viewing the license summary](#)

## To start a trial subscription

**i** | **NOTE:** You can use the product free during the 30-day trial period with a limited number of users that can be migrated.

1. Open <https://www.quest.com/products/on-demand-migration/>.
2. Scroll down to the module you want to try and click **Try Online**.
3. To proceed you should read and accept license agreement.
4. Select **Sign In for your Free Trial** option to use your existing Quest account, or **Create a Trial account** option to create a new account.
5. You will receive an email containing step by step instructions on starting your trial period for the product.

The following table shows the trial license limits:

Feature	License	Limitation
Accounts	5 Accounts	none
Email	5 Mailboxes	5 GB content per mailbox
OneDrive	5 Accounts	256 files or 256 MB per OneDrive account
SharePoint	5 SP sites	5 GB content per SharePoint site. ODMSP will not discover sites with more than 5 GB.
Teams / M365 Groups	5 Teams or Groups	5 GB content per Teams or M365 Groups
1x1 Chats	5 Accounts	The most recent 2 conversations and messages up to 30 days per

Feature	License	Limitation
		conversation
Power BI	5 Accounts	none

### To purchase a commercial subscription

1. Open <https://www.quest.com/products/on-demand-migration/>.
2. Click **Request Pricing** and fill in the necessary details.
3. Click **Contact Sales** to request pricing and get help with your business needs.

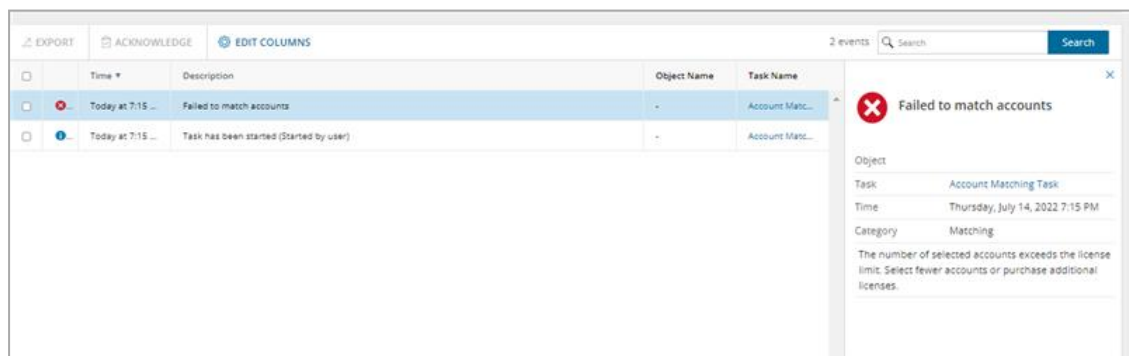
The product licensing is based on the number of **unique source accounts** processed by the migration tasks. The licenses are only consumed once the migration task is started.

The following object types do not consume any license,

- Group mailboxes
- AD Groups
- Contacts
- Exchange resource mailboxes
- public folder mailboxes
- room mailboxes or equipment mailboxes
- shared mailboxes
- Guest accounts
- Computer accounts

**i NOTE:** The license is **permanently** assigned to the source account may only be used for one migration project, and you can use this account in any number of tasks (migration, re-matching, etc.) from one environment to another environment.

The matching task will result in the error message shown in the image below, in case the number of users in the task exceeds the number of available licenses.



For commercial licenses, there are no content migration data limits for OneDrive, SharePoint, mailbox and public folders.

### To view the license report

License consumption data is available as you work through your migration project.



**NOTE:** License data before October 18th 2022 displays only the **Licensed user email** and the corresponding **Consumed On** column value indicates the date when the data was uploaded.

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the migration dashboard. You must create at least one project to view the dashboard.
3. Click **View License Report** to open the *License Report* workspace.
4. Click **List View** to open the list of consumed licenses. The columns in the table are as described below:
  - **Consumed On** - date and time the license was consumed.
  - **Signed-in user** - user name of the person who consumed the license.
  - **Licensed user email** - User Principal Name (UPN) of the signed-in user
  - **Task name** - name of the task that consumed the license.
  - **Task type** - type of task that consumed the license
  - **Project** - name of the project where the license was consumed.
5. Click **Edit Columns** to show or hide columns in the list.

#### **To export licenses consumption data**

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the migration dashboard. You must create at least one project to view the dashboard.
3. Click **View License Report** to open the *License Report* workspace.
4. Click **List View** to open the list of consumed licenses.
5. Select the rows that you want to export. Then click **Export**. A CSV file will be downloaded to your default download folder.
6. Open the downloaded CSV file to view the exported information.

#### **To search for licenses consumed**

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the migration dashboard. You must create at least one project to view the dashboard.
3. Click **View License Report** to open the *License Report* workspace.
4. You can search for consumed licenses in two ways:
5. Use the following predefined filters:
  - a. **License Consumption** - filters the list based on the following consumption periods: Last 7 days, Last 30 days, All
  - b. **Task Type** - filters the list based on the selected task type. The following values are available: Account Migration, Mail Migration, OneDrive Migration, Teams, Chats, All-or-
  - c. Enter the full or partial name of the user in the search field. Click **Search**. The list of licenses consumed by the user is displayed.



### **To view the license summary**

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the migration dashboard. You must create at least one project to view the dashboard.
3. Click **View License Report** to open the *License Report* workspace.
4. Click **Summary** to open the summary view of consumed licenses.
5. The two report tiles contain the following information:
  - a. **Licenses Consumed**
    - **Last 7 days** - number of licenses consumed in the previous 7 days.
    - **Last 30 days** - number of licenses consumed in the previous 30 days.
    - **All** - total number of licenses consumed.
  - b. **Licenses**
    - **Total ODM licenses** - total number of licenses from active migration subscriptions only.
    - **Used ODM licenses** - total licenses used that include active and expired migration subscriptions.
    - **Total Teams only licenses** - total Teams migration licenses from active migration subscriptions only.
    - **Used Teams only licenses** - total Teams licenses used that include active and expired migration subscriptions.
    - **Reserved by matches** - number of licenses reserved but not consumed after accounts in the source tenant are matched with accounts in the target tenant. You can release the reserved licenses when you unmatch the accounts using the **Clear matching** task.

## Organizations and Regions

When you sign up for the On Demand service for the first time, you create an organization and you are granted the On Demand Administrator role. You can add additional organizations and administrators.

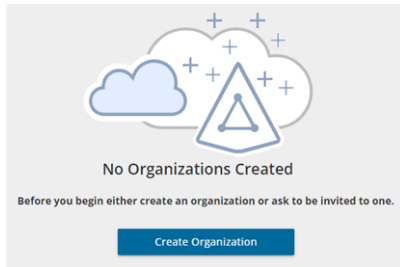
For more information about managing your organization see [Managing organizations and regions](#) in the *On Demand Global Settings User Guide*.

Some common actions with Organizations are reproduced here for your reference:

- [Creating an organization](#)
- [Switching to another organization](#)
- [Renaming an organization](#)
- [Deleting an organization](#)

## Creating an organization

1. Sign in to [Quest On Demand](#).
2. If you have not yet created an organization, click **Create Organization**.



If you have created one or more organizations, the *Choose an Organization* page opens. Click **Create New Organization**.

If you have already selected an organization, click your email address at the top right-hand corner of the page and then select **Create Organization**.

3. In the *Create Organization* page, specify the following information:
  - **Organization Name** - name of your organization. For example, Big Box Inc.
  - **Deployment Region** - A Microsoft Azure region or geographic area where data centers are deployed. Not all On Demand modules are available in all regions.
4. Click **Create Organization**.

## Switching to another organization

If you have multiple organizations associated with your email address, you can select an organization from the *Choose an Organization* page when you sign in. If you have already selected an organization but want to work with another organization, you can switch to another organization.

1. Click your email address at the top right-hand corner of the page.
2. Select **Switch Organization**. The *Choose an Organization* page opens.
3. Highlight and click the organization to which you want to switch.

## Renaming an organization

You can rename the organization to which you are currently signed in. You must be an On Demand Administrator to rename an organization.

1. Sign in and select the organization that you want to change.
2. Click your email address at the top right-hand corner of the page.
3. Click the organization name. The *Edit Organization* page opens.
4. In the **Organization Name** field, enter the new name.
5. Click **Update Organization Name**. The organization name is updated.

## Deleting an organization

**CAUTION:** Deleting an organization cannot be undone.

1. Sign in and select the organization that you want to change.
2. Click your email address at the top right-hand corner of the page
3. Click the organization name. The *Edit Organization* page opens.
4. Click **Delete Organization**. A confirmation page opens.
5. Select the following check boxes to confirm that you understand the impact of deleting an organization.
  - All tenants will be removed
  - All user information will be lost
6. Click **Delete Organization**.

## Roles

Quest On Demand uses the **Role-based Access Control** (RBAC) security policy that restricts information system access to authorized users. Subscribers can create specific roles based on job functions, with the permissions to perform needed operations on the assets of the organization. When users are assigned to On Demand roles, they inherit the authorizations or permissions defined for those roles. RBAC simplifies permission administration for subscribers because permissions are not assigned directly to every user (which can be a significant number of individuals for mid- to large-size organizations) but are instead acquired through role assignments.

The following are some key Quest On Demand and tenant roles that you will need to work with On Demand Migration.

### On Demand Administrator

This role is assigned to users who have full access to the Quest On Demand application. They can manage organizations and tenants, initiate the migration of tenant assets, manage licenses, audit records and perform many other functions through the Quest On Demand application. Some of the key permissions associated with this role are as follows:

Permission	Description	Service Scope
Can Export Data	Permission to export data as well as download the premigration report, comparison report and error report.	On Demand Migration
Create, Rename and Delete projects	Required permission to create, rename and delete migration projects from the Projects Dashboard	On Demand Migration
View projects and manage selected services	This permission must be selected to activate the individual permissions to view and manage services. Services selected for this permission will be inherited by all child permissions.	On Demand Migration
View projects	Required permission to be able to view objects tasks and events for the selected services. Only the tiles for the selected services will be shown in the project dashboards. Always inherited from parent permission	On Demand Migration
Edit project properties	Permission to edit properties associated with project services. For example, this permission enables access to Accounts Configure Connections and SharePoint Configure Project.	On Demand Migration

Permission	Description	Service Scope
Run a full discovery	Permission to enable the action that allows users to run the task that will discover all available objects.	Accounts, Teams, SharePoint, Public Folders, Power BI
Run a scoped discovery with CSV file	Permission to enable the actions that allows users to run the task that will discover objects based on a list contained in a prepared CSV file.	Accounts, Teams, SharePoint
Run a scoped discovery from security group	Permission to enable the actions that allows users to run the task that will discover objects based on selected security group.	Accounts
Run content discovery tasks	Permission to enable the actions that allows users to discover content and statistics about selected objects.	Mailboxes, OneDrive, SharePoint, Power BI
Run match and map tasks	Permission to enable the actions that allows users to find matching objects on the target for selected objects and to map objects on source and target based on prepared CSV file.	Accounts, Teams, SharePoint, Power BI
Run provision and migration tasks	Permission to enable the actions that allow user to provision and migrate selected objects to the target.	On Demand Migration
Manage collections	Permission to enable actions for creating and manage the Collection feature.	On Demand Migration
Update and delete migration objects	Permission to enable the action that allows the user to remove selected objects form the list of services object grid.	On Demand Migration
Acknowledge and clear task events	Permission to enable the action that allows the user to acknowledge and clear events from the Events grid.	On Demand Migration
Manage Desktop Update Agent	Permission to enable all management actions in Desktop Update Agent.	Desktop Update Agent
View Reporting Dashboard	Permission to view reports from the project dashboard	On Demand Migration

## On Demand predefined roles

Quest On Demand is shipped with many predefined roles. On Demand Administrator, Migration Administrator, Audit Administrator, License Management Administrator and Recovery Administrator are some examples.

## On Demand custom roles

You can create more roles with specific permissions to allow other users to work with On Demand Migration. See the [On Demand Global Settings Current User Guide](#) for more information about setting up roles.

## Tenant Administrator

In this document the term *Tenant Administrator* refers to the Azure active directory user account for the source or target tenant that is assigned the **Global administrator** security role and has full access to the tenant. Each tenant that you add to a project requires the credentials of the Tenant Administrator. The Tenant Administrator may require additional roles to grant the necessary consents to various On Demand service principals that are created in the tenant to access various assets in the tenant during the migration lifecycle. See [Consents and Permissions](#) for more details. For more information about user and service principals see the Microsoft article [Application and service principal objects in Azure Active Directory](#).

Tenant Administrator accounts must have a mailbox with a valid Microsoft Exchange Online license.

To use On Demand Migration, the Tenant Administrator for each tenant in a project must grant Azure consents and permissions to the On Demand Migration service principals.

## Migration Service account

You can use a temporary tenant user account to operate on tenant assets. In this document the term *Migration Service account* refers to the source or target Azure active directory user account that has temporary access to the tenant through the **Global administrator** security role. Depending on the tenant asset that is being migrated, this temporary user account must grant specific consents. For example, when teams are migrated, the account that is assigned the Migration Service role is added to the team. This temporary role is required for migrating teams by the On Demand Migration service.

If you choose to work with this temporary account, you must login to the tenant as the *Migration Service* and grant the consents and permissions to the On Demand service principal.

When you are done with the migration, it is recommended that you delete the temporary account for security reasons. See [Finalizing the Migration](#) for more details.

# Working with On Demand Migration

On Demand Migration provides intuitive project management for migrating accounts and content from one tenant to another. 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. You can create multiple migration projects and use the My Projects list view for a summarized list of all your migration projects.

## Migration steps

References to common migration steps are provided in the table below. There are many more activities that are required to prepare and migrate Office 365 assets, and these are described in detail in the subsequent topics.

Stage	Step
Preparation	<a href="#">Add source and target tenants</a>
	<a href="#">Grant consents</a>
	<a href="#">Upgrade throttling policies, install a Desktop Update Agent, plan a test or pilot migration</a>
	<a href="#">Create a migration project</a>
	<a href="#">(optional) Discover and match Sensitivity Labels</a>
Account migration	<a href="#">Discover accounts</a>
	<a href="#">Match source accounts with the existing target accounts</a>
	<a href="#">Migrate accounts</a>
	<a href="#">(optional) Start Address Rewriting for Domain Coexistence</a>
Mailbox migration	<a href="#">Migrate mailboxes</a>
	<a href="#">Grant access to source user's resources to target users</a>
OneDrive migration	<a href="#">Migrate OneDrive</a>
Teams and Groups migration	<a href="#">Migrate Microsoft Teams</a>
Groups migration	<a href="#">Migrate Microsoft 365 Groups</a>
SharePoint migration	<a href="#">Migrate SharePoint objects</a>
Private Folders migration	<a href="#">Migrate Public Folders</a>
Power BI migration	<a href="#">Migrate Power BI objects</a>
Management	<a href="#">Monitor the progress and track issues</a>
	<a href="#">Finalize the migration</a>
	<a href="#">Troubleshooting</a>

# Tenants

Each On Demand migration project needs a source and target tenant. These are **Commercial** tenants. Commercial tenants are exclusively hosted and managed by Microsoft. For users in the United States deployment region, On Demand Migration offers two options depending on the type of Microsoft 365 tenant that you want to add:

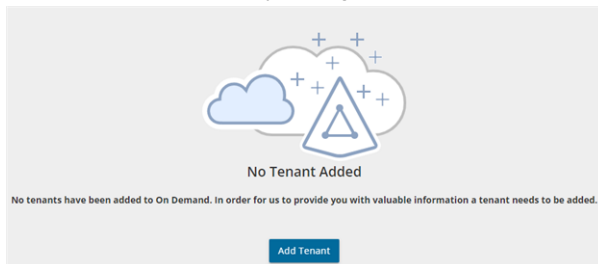
- **Commercial or GCC Tenant** - choose this option if you want to add either a Microsoft 365 commercial tenant hosted on the Azure public cloud or a Microsoft 365 GCC (Government Community Cloud) tenant with moderate cyber-security and compliance standards hosted on the Azure Government cloud. For more information about worldwide endpoints, see [Microsoft 365 Worldwide endpoints](#).
- **GCC High Tenant** - choose this option if you want to add a Microsoft 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. For more information, see [Microsoft 365 U.S. Government GCC High endpoints](#).

**i** **NOTE:** When you create a migration project, a GCC or GCC High tenant can be used as the target tenant only. Currently, only the On Demand Migration module supports GCC and GCC High tenants.

For more information about adding, removing and managing tenants, see [Managing your Azure tenants and on-premises domains](#) in the *On Demand Global Settings Current User Guide*.

## Adding a tenant

1. Log in to On Demand using the credentials you used to sign up for On Demand.
2. If you have multiple organizations you must select an organization. If you have a single organization it will be automatically selected.
3. If there are no tenants in your organization, click **Add Tenant**.



-or-

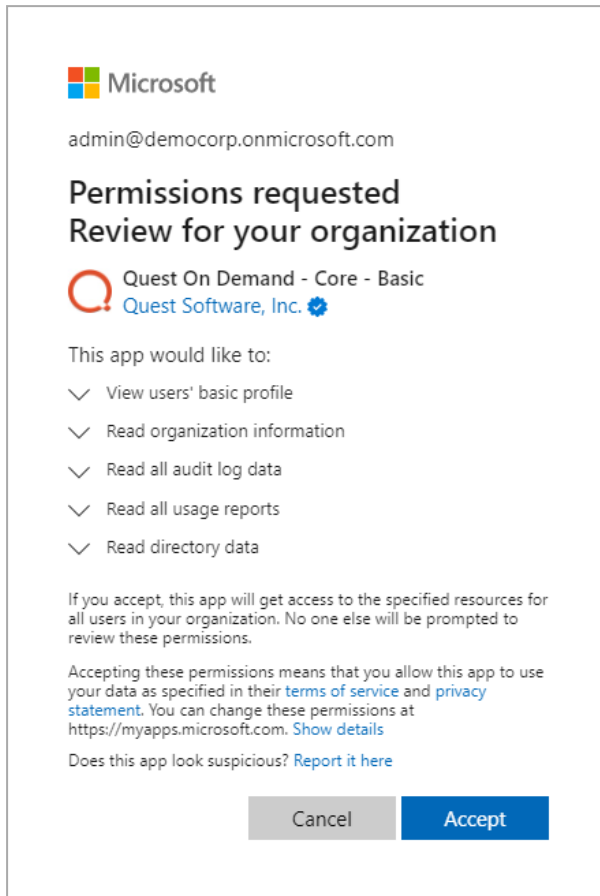
In the navigation panel on the left, click **Tenants**. The *Office 365 Tenants* page opens. Then click **Add Tenant**.

4. The *Add Tenant* page opens.
  - If you are in the US region, you must select the type of tenant that you are adding:
    - Click **Add Commercial or GCC Tenant**
    - or -
    - Click **Add GCC High Tenant**

You are redirected to the Azure sign in page.

- If you are in any region other than the US region, such as Europe, United Kingdom, Canada, or Australia, you are immediately redirected to the Microsoft login page.

5. Enter your Azure AD Global Administrator credentials for the *source* tenant and click **Next**. A page opens with the list of permissions that you are granting.



6. Click **Accept** to grant consent to the initial **Core - Basic** permission set to the On Demand service principal.
7. The *Office 365 Tenants* page opens with the tenant added as a new tile.
8. Repeat the steps to add a *target* tenant.

## Consents and Permissions

The ability for On Demand service principals to access and operate with tenant assets requires explicit permissions. The Tenant Administrator grants these permissions through consents. Multi-factor authentication (MFA) is supported for tenant administrators when granting consents.

When a tenant is added, the initial **Core - Basic** permission set is granted consent to the On Demand service principal. Additional consents are required to work with different features of On Demand Migration

While consents allow Quest On Demand Migration to access tenant assets that are exposed to the application, you can selectively restrict access to specific assets in your tenant and allow access to the other assets in the environment. Granting selective access requires additional configuration in your tenant as described below.

In this topic:



- [Restricting access scope](#)
- [Granting Consents](#)
- [Consents for initial tenant setup](#)
- [Consents for Sensitivity Labels](#)
- [Consents for Account Migration](#)
- [Consents for Mailbox Migration](#)
- [Consents for Public Folder Migration](#)
- [Consents for OneDrive Migration](#)
- [Consents for Teams and M365 groups Migration](#)
- [Consents for SharePoint Migration](#)
- [Consents for Power BI Migration](#)
  - [Azure Portal Security Group Setup](#)
  - [Power BI Setup](#)
- [Verifying Service Principals](#)

## Restricting access scope

You can use the following resource-scoped access control methods in your tenant:

### Role Based Access Control for Exchange Online

RBAC for Applications in Exchange Online allows admins to grant permissions to Quest On Demand Migration for Mailboxes which migrates data in Exchange Online. Exchange Online RBAC permissions must be set up in the tenant for Exchange Web Services (EWS) to ensure that Quest On Demand Migration for Mailboxes can migrate mailbox data for users within the scope of the RBAC configuration. See the [Knowledge Base](#) for more details or contact Quest Technical Support for assistance.

### Sites.Selected permission for specific SharePoint Online site collections

You can enhance the security of SharePoint Online (SPO), by ensuring that On Demand Migration for SharePoint has access only to specific SharePoint sites, preventing unnecessary exposure to other sites in the environment. To achieve selected access, you must configure the Sites.Selected permission which is part of the permissions model for controlling access to specific SharePoint sites or site collections.

This permission can also be used to restrict On Demand Migration for Teams for migrating Teams and M365 Groups within the scope of the specific SharePoint sites that are exposed to the application.

Here's a breakdown of what Sites.Selected means:

**Purpose:** The Sites.Selected permission is used primarily in the context of Microsoft Graph API or Azure AD permissions, where you want to restrict access to only specific SharePoint sites. It is part of the delegated or application permissions model, which allows a service or app to interact with SharePoint on behalf of the user (in delegated permissions) or as itself (in application permissions).

**What it does:** This permission gives an application or user the ability to access only selected SharePoint sites, instead of granting broader access to all sites in the tenant. This is more granular compared to other permissions like Sites.FullControl.All, Sites.Read.All, or Sites.Manage.All, which grant broader access.

**Key Permissions in Comparison:**

- **Sites.FullControl.All:** This allows full control of all SharePoint sites across the tenant.
- **Sites.Read.All:** This provides read access to all sites in the tenant.
- **Sites.Selected:** Access is restricted to a specific set of sites (only the ones specified).



**NOTE:** When implemented, Site.Selected replaces the Sites.FullControl.All and Sites.Read.All permissions.

#### Example Scenarios:

- Admin-level control: An administrator can use Sites.Selected to configure apps that need specific access to particular sites for functions like document management, workflow integration, or customized solutions.
- Granular control: You could use it for limiting access to a few department-specific sites or a small set of collaborative sites, instead of granting Quest On Demand access to the entire SharePoint Online environment.

How it's implemented: The Sites.Selected permission, is typically granted during the registration of an Azure AD app, or when configuring API permissions to interact with SharePoint via Graph API. It requires specifying the sites the app will have access to, and this can be done by defining a list of URLs or site identifiers. This permission requires implementation through the Azure portal, PowerShell scripts and Graph explorer. See the [Knowledge Base](#) for more details or contact Quest Technical Support for assistance with this implementation.

## Granting Consents

1. Click **Tenants** from the navigation pane.
2. Select a tenant and click **Edit Consents** from the tenant tile.
3. Click **Grant Consent** or **Regrant Consent** for the permissions type.
4. Log in as the [tenant administrator](#) of the source or target tenant. Then click **Accept** in the Microsoft consents dialog.

This section lists the **minimum** consents and roles required by the various On Demand Migration service principals for managing tenants, Microsoft 365 objects and other migration services.



**NOTE:** The following permission sets are legacy and not available for new Quest® On Demand Migration subscribers. If you already use them, they should be replaced with either the corresponding **Minimal** or **Full** permission sets.

- **Migration - Basic**
- **Migration - Mailbox Migration**
- **Migration - SharePoint**
- **Migration - Teams**

For more details about the permissions granted through consents for each service principal, see the [On Demand Migration Permissions Reference Guide](#).

## For initial tenant setup

Task	Minimum consents and permissions
Add and configure tenants, and grant consent	<b>Core-Basic</b> consent from both <i>Source</i> and <i>Target</i> tenant administrator accounts. <b>Global Administrator</b> role from both source and target tenant administrator accounts.

Each tenant that is added is granted consent to the initial **Core - Basic** permission set to the On Demand service principal. Additional consents are required to work with different features of On Demand Migration.

## For Sensitivity Label migration

Task	Minimum consents and permissions
All tasks	<b>AIP protected content migration - Read</b> consent from <i>Source</i> tenant administrator accounts. <b>AIP protected content migration - Write</b> consent from <i>Target</i> tenant administrator accounts.

## For Account migration


Task	Minimum consents and permissions
All tasks including discover and migrate accounts	<b>Migration - Basic - Minimal</b> consent from <i>Source</i> tenant administrator accounts. <b>Migration - Basic - Full</b> consent from <i>Target</i> tenant administrator accounts.
Migrate hybrid accounts	<b>Global Administrator</b> role for both <i>Source</i> and <i>Target</i> tenant administrator accounts.
Migrate Guest Users	<b>Guest Inviter</b> role for both <i>Source</i> and <i>Target</i> tenant administrator accounts.

## For Mailbox migration


Task	Minimum consents and permissions
All tasks	<b>Migration - Basic - Minimal</b> consent from <i>Source</i> tenant administrator accounts. <b>Migration - Basic - Full</b> consent from <i>Target</i> tenant administrator accounts.
Migrate mailboxes	<b>Migration - Mailbox Migration - Minimal</b> consent from <i>Source</i> tenant administrator accounts or <b>Migration - Mailbox Migration - Custom RBAC</b> with additional consents from <i>Source</i> tenant administrator accounts. and <b>Migration - Mailbox Migration - Full</b> consent from <i>Target</i> tenant administrator accounts or <b>Migration - Mailbox Migration - Custom RBAC</b> with additional consents from <i>Target</i> tenant administrator accounts.

## For Public Folder migration

Task	Minimum consents and permissions
All tasks	<b>Migration - Basic - Minimal</b> consent from <i>Source</i> tenant administrator accounts. <b>Migration - Basic - Full</b> consent from <i>Target</i> tenant administrator accounts.
Migrate Public Folders	<b>Migration - Mailbox Migration - Minimal</b> consent from <i>Source</i> tenant administrator accounts. <b>Migration - Mailbox Migration - Full</b> consent from <i>Target</i> tenant administrator accounts. <b>Owner</b> permission for the root Public Folder of the target tenant must also be granted to the target tenant administrator account.

Task	Minimum consents and permissions
	 <b>IMPORTANT:</b> You must explicitly provide the username of the root Public Folder owner using <a href="#">Configure Connections</a> .

## For OneDrive migration

Task	Minimum consents and permissions
All tasks	<b>Migration - Basic - Minimal</b> consent from <i>Source</i> tenant administrator accounts. <b>Migration - Basic - Full</b> consent from <i>Target</i> tenant administrator accounts.
Migrate OneDrive	<b>Migration - OneDrive - Minimal</b> consent from <i>Source</i> tenant administrator accounts. <b>Migration - OneDrive - Full</b> consent from <i>Target</i> tenant administrator accounts.
Provision OneDrive	<b>SharePoint Administrator</b> role for provisioning OneDrive on the target tenant.  <b>IMPORTANT:</b> You must provide explicit credentials using <a href="#">Configure Connections</a> . Multi-factor authentication (MFA) is not supported for accounts whose credentials are entered explicitly.

## For SharePoint migration

Task	Minimum consents and permissions
All tasks	<b>Migration - Basic - Minimal</b> consent from <i>Source</i> tenant administrator accounts. <b>Migration - Basic - Full</b> consent from <i>Target</i> tenant administrator accounts.
Migrate SharePoint	<b>Migration - SharePoint - Minimal</b> consent from <i>Source</i> tenant administrator accounts. <b>Migration - SharePoint - Full</b> consent from <i>Target</i> tenant administrator accounts.

## For Teams migration

Task	Minimum consents and permissions
All tasks	<b>Migration - Basic - Minimal</b> consent from <i>Source</i> tenant administrator accounts. <b>Migration - Basic - Full</b> consent from <i>Target</i> tenant administrator accounts.
Migrate Teams and Microsoft 365 Groups with Teams functionality	<b>Migration - Mailbox Migration - Minimal</b> for the <i>Source</i> tenant <b>Migration - Mailbox Migration - Full</b> for the <i>Target</i> tenant <b>Migration - SharePoint - Minimal</b> for the <i>Source</i> tenant <b>Migration - SharePoint - Full</b> for the <i>Target</i> tenant. <b>Migration - Teams - Minimal</b> for the <i>Source</i> tenant <b>Migration - Teams - Full</b> for the <i>Target</i> tenant. <b>Global Administrator</b> Entra ID role or both the <b>Teams Administrator</b> and

Task	Minimum consents and permissions
------	----------------------------------

**Exchange Administrator** Entra ID roles for *Source* and *Target* tenant administrator accounts. In addition to these roles, the tenant administrator account that grants the consents to the Migration - Teams service also requires the following:

- an active Microsoft 365 license
- Microsoft Teams app enabled within the Microsoft 365 license
- the account must remain active for the duration of the migration

## For Power BI migration

Task	Minimum consents and permissions
------	----------------------------------

All tasks	<b>Migration - Basic - Minimal</b> consent from <i>Source</i> tenant administrator accounts. <b>Migration - Basic - Full</b> consent from <i>Target</i> tenant administrator accounts.
View Power BI	<b>Migration - Power BI</b> consent from <i>Source</i> and <i>Target</i> tenant administrator accounts. <b>Global Administrator</b> role from both source and target tenant administrator accounts.
Migrate Power BI	Additional manual setup is required for both source and target tenants through the Azure portal. The steps required to grant additional permissions are described below.

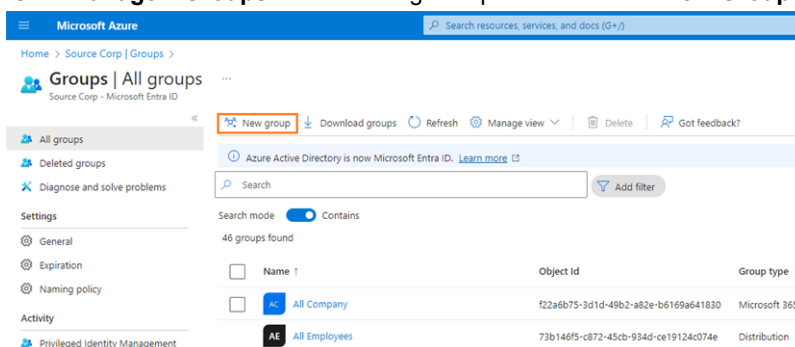
### Granting additional permissions for the source and target tenants

This is a two part process as described below:

#### Part 1: Azure Portal Security Group Setup

In this part, a new security group is created in Microsoft Entra ID for each source and target tenant, to associate the service principal of the Quest On Demand - Migration - Power BI enterprise application. Additional permissions can be then be granted to the service principal to access and operate on Power BI objects.

1. Login to <https://portal.azure.com> with your tenant credentials.
2. Open the **Microsoft Entra ID** service page.
3. Click **Manage > Groups** from the navigation panel. Then click **New Group**.



4. In the *New Group* page, setup the group as described below:
  - a. **Group type** = Security
  - b. **Group name** = name of the group. For example, ODMPBI
  - c. **Group description** = short description about the group. For example, ODM Power BI Migration.
  - d. Under **Members**, click **No members selected**
  - e. In the *Add members* list that opens, search and select **Quest On Demand - Migration - Power BI**. Then click **Select** at the bottom of the page.

The screenshot shows the 'New Group' page in the Microsoft Azure portal. The breadcrumb navigation is 'Home > Source Corp | Groups > Groups | All groups >'. The page title is 'New Group'. Below the title is a 'Got feedback?' link. The form contains the following fields and options:

- Group type \***: A dropdown menu with 'Security' selected.
- Group name \***: A text input field containing 'ODMPBI' with a green checkmark.
- Group description**: A text input field containing 'ODM Power BI Migration security group.' with a green checkmark.
- Microsoft Entra roles can be assigned to the group**: Radio buttons for 'Yes' and 'No', with 'No' selected.
- Membership type \***: A dropdown menu with 'Assigned' selected.
- Owners**: A section with the text 'No owners selected'.
- Members**: A section with the text '1 member selected'.
- Create**: A blue button at the bottom of the form.

- f. Click **Create**. The group is created with the **Quest On Demand - Migration - Power BI** service principal as a member.
5. Follow all the above steps to create a security group in both source and target tenants.

## Part 2: Power BI Setup

In this part, the security group created in each tenant is configured to allow the service principals to use Power BI APIs and create and use Power BI profiles.

1. Log into the Power BI service portal at <https://app.powerbi.com> with your tenant credentials.
2. Click the **Settings** icon in the top bar and then click **Admin portal**.
3. From the navigation panel, click **Tenant settings**.

4. Scroll down to the **Developer Settings** section.
  - a. Expand the **Embed content in apps** option.
    - i. Set the slider to **Enabled**.
    - ii. For the **Apply to** option, select **Specific security groups**, and specify the group name created in Part 1 above. For example, enter ODMPBI.
    - iii. Click **Apply** to save the changes.

Developer settings

⚙ Embed content in apps  
*Unapplied changes*

Users in the organization can embed Power BI dashboards and reports in Web applications using "Embed for your customers" method. [Learn More](#)

☒ Enabled

Apply to:

☐ The entire organization

☒ Specific security groups

Enter security groups

☐ Except specific security groups

**Apply** Cancel

- b. Under **Developer Settings**, expand following options. Then enable each option and repeat the above steps to associate the security group:
    - **Service principals can use Fabric APIs**
    - **Allow service principals to create and use profiles**
5. Scroll down to the **Admin API settings** section.
6. Expand following options. Then enable each option and repeat the above steps to associate the security group:
  - **Service principals can access read-only admin APIs**
  - **Enhance admin APIs responses with detailed metadata**

- **Enhance admin APIs responses with DAX and mashup expressions**

Admin API settings

Service principals can access read-only admin APIs  
*Enabled for a subset of the organization*

Service principals can access admin APIs used for updates  
*Enabled for a subset of the organization*

Enhance admin APIs responses with detailed metadata  
*Enabled for a subset of the organization*

Users and service principals allowed to call Power BI admin APIs may get detailed metadata about Power BI items. For example, responses from GetScanResult APIs will contain the names of semantic model tables and columns. [Learn More](#)

Note: For this setting to apply to service principals, make sure the tenant setting allowing service principals to use read-only admin APIs is enabled. [Learn More](#)

☒ Enabled

Apply to:

☐ The entire organization

☒ Specific security groups

☒ ODMPIBI

☐ Except specific security groups

Apply
Cancel

Enhance admin APIs responses with DAX and mashup expressions  
*Enabled for a subset of the organization*

7. For the source tenant, expand **Export and sharing settings** and verify the **Download reports** option is **Enabled** and the option is either set to **The entire organization** or **Specific security groups** with the group name created in Part 1 above.

Export and sharing settings

Download reports  
*Unapplied changes*

Users in the organization can **download** .pbix files and paginated reports. [Learn More](#)

☒ Enabled

Apply to:

☐ The entire organization

☒ Specific security groups

☒ ODMPIBI

☐ Except specific security groups

Apply
Cancel

8. For the target tenant expand **Workspace settings** and verify the **Create workspaces** option is **Enabled** and the option is either set to **The entire organization** or **Specific security groups** with the group name created in Part 1 above.

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Working with On Demand Migration

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Workspace settings

△ **Create workspaces**  
*Unapplied changes*

Users in the organization can **create** app workspaces to collaborate on dashboards, reports, and other content. Even if this setting is disabled, a workspace will be **created** when a template app is installed.

☒ Enabled

Apply to:

☐ The entire organization

☒ Specific security groups

☐ Except specific security groups

**Apply** Cancel

To migrate Power BI data, the security group must also be granted explicit rights in all tenant Power BI objects like Connections, Gateways and Workspaces.

#### For Connections and Standard Gateways

1. Click the **Settings** icon in the top bar and then click **Manage connections and gateways**.
2. Under **Manage connections and gateways**, select each On-premises gateway and give **Admin** rights to the group, created in Part 1.
3. Repeat the above steps for source and target tenant.

**i** | **NOTE:** The Service Principal in the source tenant must be assigned the **Admin** permission.

#### For each Workspace that you want to migrate (Source tenant only)

1. Open the Workspace and click **Manage Access**.
2. In the **Add people** page that opens, add the security group created in part 1 and assign the **Admin** role to the group.

← **Add people** ×

Corporate

Admins, members, and contributors have edit and view access. Viewers only have view access. [Learn more](#)

Enter name or email

Admin ▾ **Add**

**i** | **NOTE:** The Service Principal in the source tenant must be assigned the Owner/Admin permission.

## Verifying Service Principals

When you have granted the consents, you can verify that the service principals were successfully created in the tenant. You must verify both source and target tenants.

1. Log in to [Microsoft Entra Admin Center](#).
2. Go to **Identity > Applications > Enterprise applications** from the navigation panel. Then click **All applications**. Filter the list if necessary and verify the list of Quest On Demand service principals. Your list depends on the subscriptions and consents that you have granted, and may differ from the image below.









[+ New application](#)
[↺ Refresh](#)
[⬇ Download \(Export\)](#)
[i Preview info](#)
[☰ Columns](#)
[🔍](#)

View, filter, and search applications in your organization that are set up to use your Azure AD tenant as their IdP

The list of applications that are maintained by your organization are in [application registrations](#).

Application type == **Enterprise Applications** ✕
 Application ID starts with ✕
 [+ Add filters](#)

9 applications found

Name	↑↓	Object ID
 Quest On Demand - Core - Basic		b92ae286-0e5e-4acb-9e19-11...
 Quest On Demand - Migration - Basic - Full		79744cc7-b320-4683-9198-4e9...
 Quest On Demand - Migration - Teams - Full		0fc663f5-728f-4e86-8aff-30eb9...
 Quest On Demand - Migration - Mailbox Migration - Full		7459f030-3d07-45f1-a545-36c...
 Quest On Demand - Migration - OneDrive - Full		28b7323e-b8e3-4cbc-9bcf-699...
 Quest On Demand - Migration - Power BI		5af659e1-ee19-4906-937c-821...
 Quest On Demand - Migration - SharePoint - Full		5daa4450-0bba-4f44-8b7c-41c...
 Quest on Demand - Core - Exchange Online PowerShell		62b6004a-e8b3-4a0c-ad6f-51a...

# Throttling

Microsoft service throttling limits the number of concurrent calls to a Microsoft service to prevent overuse of resources. These limits are set by the Microsoft services and are dependent on the service type along with the operations that are being completed by On Demand for the service. In addition, any throttling limits are subject to change by Microsoft.

## Microsoft Graph

Microsoft Graph is designed to handle a high volume of requests. If an overwhelming number of requests occurs, throttling helps maintain optimal performance and reliability of the Microsoft Graph service. For more information, see <https://learn.microsoft.com/en-us/graph/throttling>. Microsoft enforces throttling limits for Microsoft Graph based on tenant size, including requests-per-minute and requests-per-day. Microsoft does not provide a method for modifying these limits.

## Microsoft Power BI REST API

The Microsoft Power BI REST API (Admin API) may experience throttling during usage, as concurrent API access is monitored for any ongoing tasks within a tenant. Discovery tasks are likely to be the most affected by this throttling. We recommend that discovery or statistics collection be run as standalone tasks to minimize potential impacts. For more information, please reference the following documentation from Microsoft: <https://learn.microsoft.com/en-us/rest/api/power-bi/#throttling>

- Limitations for reading of workspaces
  - <https://learn.microsoft.com/en-us/rest/api/power-bi/admin/groups-get-groups-as-admin#limitations>
- Limitations for reading users in workspaces
  - <https://learn.microsoft.com/en-us/rest/api/power-bi/admin/groups-get-group-users-as-admin?tryIt=true&source=docs#limitations>

## Handling ODM Throttling

Quest On Demand Migration follows best practices provided by Microsoft when experiencing throttling. These include reducing the number of operations of requests, reducing the frequency of calls and avoiding immediate retries, since all requests accrue against the usage limits for the application.

For requests that an application makes, such as On Demand Migration, including Microsoft Graph, CSOM, or REST calls, Microsoft can return error codes including HTTP status code 429 ("Too many requests") or 503 ("Server Too Busy") which result in the requests to fail. In both cases, a Retry-After header is included in the response indicating how long the calling application should wait before retrying or making a new request.

## 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.

# Desktop Update Agent

To complete a migration project, a lightweight user desktop application called Desktop Update Agent (DUA) must be configured and deployed by administrators and run on users workstations. DUA provides enhanced support, helps ensure the success of cross-tenant migration projects, makes agent delivery easier, and status reporting more informative.

DUA features:

- Ability to manage user's application reconfigurations activities from a single view within On Demand Migration.
- Support for OneDrive for Business and Microsoft Teams.
- Support for Microsoft 365 application license reset.
- Support for various client authentication mechanisms.

For more information about downloading, administration and use of DUA, see the *Quest On Demand Migration Update Agent Guide*.

## 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

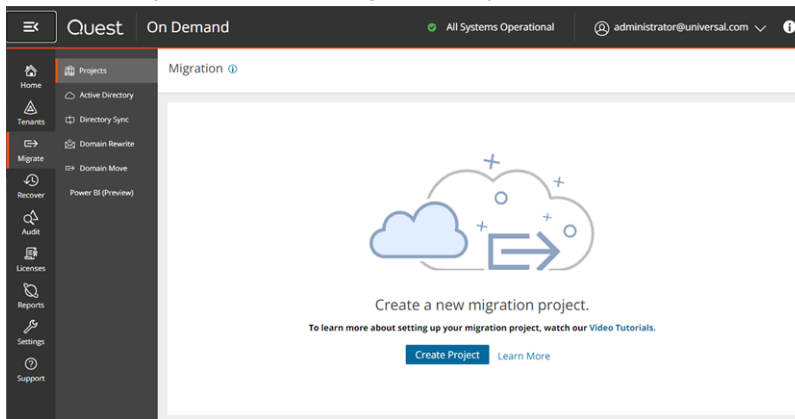
A migration project contains the full set of migration features and provides a summary of all the migration activities in the project dashboard. You can work with a single migration project for small migrations or you can set up multiple migration projects to split larger migration plans into manageable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

In this topic:

- [Creating a new migration project](#)
- [Viewing migration projects](#)
- [Renaming a migration project](#)
- [Deleting a migration project](#)
- [On Demand Migration Workspaces](#)

## Creating a new migration project

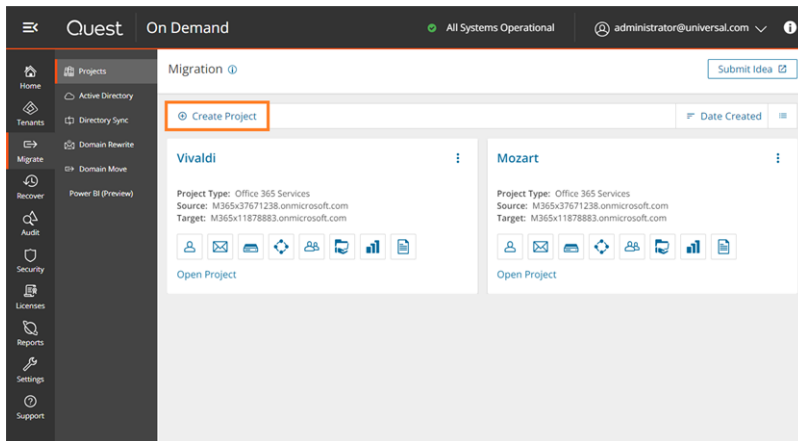
1. Sign in to [Quest On Demand](#).
2. From the navigation pane, click **Migrate > Projects** to open the *Migration* projects view.



3. To use the new project management user interface, turn on the **Try the new project wizard** toggle.
4. Click **Create Project**.

-or-

If you have already created one or more projects, click **Create Project** as shown below.



5. The *New Project* wizard starts. Each step is described below:

## 6. Project Detail

Enter the information in the fields as described below:

- Title** - Specify a meaningful name for the project. Maximum number of characters is 128.
- Description** - Enter a description about the project. Maximum number of characters is 200.
- Source Tenant** - Select a source tenant from the dropdown list.
- Target Tenant** - Select a target tenant from the dropdown list.
- Click **Save and Continue**.

## 7. Assets

Select one or more assets from the set of information assets that you want to migrate. The **Account** asset is mandatory because all other assets are directly or indirectly linked to active directory accounts in your source and target tenants.

Each asset is treated as an application for migration purposes and automatically assigned a service principal.

## 8. Consents

Most Microsoft 365 objects can be migrated when the service principals for each asset have been granted the consent. See [Consents and permissions](#) for more information.

*To grant consent the service principals:*

- Click **Grant Consent** to grant the consents to the service principal if the tenant consents were not granted when you added the tenants.

-or-

Click **Regrant Consent** to refresh the consents granted to the service principals. It is recommended that you regrant consent to ensure that the consent to the service principals are refreshed.

- Migration of some Microsoft 365 objects require a *user principal* with the **Global Administrator** or other specific roles and you must provide additional authorization. Typically, the tenant administrator credentials are provided. You can provide the credentials for authorization in the *Features* step. Select **Yes. Proceed** to activate the *Features* step. Select **No. Skip** to ignore the *Features* step.
- Click **Save and Continue**.

Create Project

### New Project

1 Project Detail — 2 Assets — 3 Consents — 4 Overview

Grant all consents to On Demand Migration.

Tenants Details	Source tenant	Target tenant
Tenant name	Source Corp	Target Corp
Tenant primary domain	sourcecorp.onmicrosoft.com	targetcorp.onmicrosoft.com
Consent Type	Source consents	Target consents
Basic	Granted Aug 4, 2022 - 3:42 PM <a href="#">REGRANT CONSENT</a> <a href="#">View Details</a>	Granted Aug 4, 2022 - 3:42 PM <a href="#">REGRANT CONSENT</a> <a href="#">View Details</a>
SharePoint	Granted Aug 4, 2022 - 3:41 PM <a href="#">REGRANT CONSENT</a> <a href="#">View Details</a>	Granted Aug 4, 2022 - 3:41 PM <a href="#">REGRANT CONSENT</a> <a href="#">View Details</a>

Do you plan to use migration features that require additional credentials?  
(Will require additional credentials)

☐ Yes, Proceed  
☒ No, Skip

[SAVE & CONTINUE](#)
[BACK](#)
[CANCEL](#)

## 9. Features

**NOTE:** This step is available if you select **Yes. Proceed** in the previous step.

To grant additional authorization with a source and target user principal:

- Enter the email address of the target user accounts.
- Enter the password of the target user accounts.
- Click **Save Credentials**. The verification must succeed to proceed.
- Click **Save and Continue**, or click **Skip this page** to avoid entering and verifying user principal accounts.

Create Project

### New Project

1 Project Detail — 2 Assets — 3 Consents — 4 Features — 5 Overview

Tenant name: Target Corp  
Tenant domain: targetcorp.onmicrosoft.com

Enter the credentials of the tenant administrator or another Azure AD administrator with additional roles for the following feature:

- Provision OneDrive accounts

Enter Target credential for special use cases

Account

admin@targetcorp.onmicrosoft.com

Password

Save Credentials

Skip this page →



[Cancel](#)
[Back](#)
[Save & Continue](#)



## 10. Overview

- a. Verify the information you have provided for each step. Click **Edit** to return to the step and revise the information as needed.
- b. Select **Open Project** to open the project dashboard.
- c. Click **Finish** to activate the project.
- d. Click **Open Project** to open the project workspace.

## Viewing migration projects

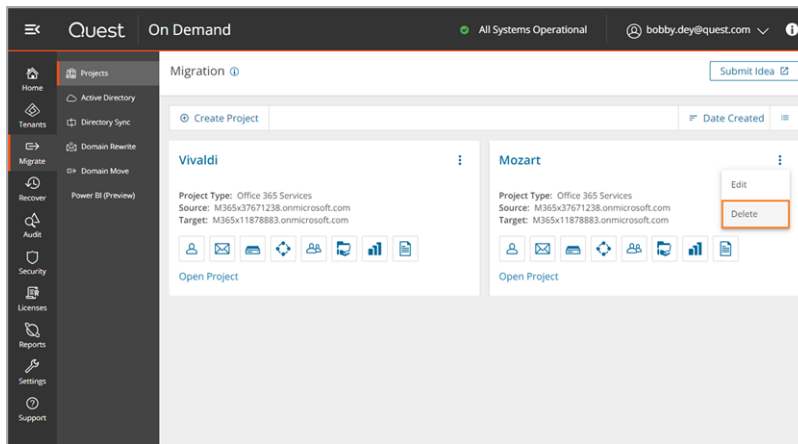
1. Sign in to [Quest On Demand](#).
2. From the navigation pane, click **Migrate > Projects** to open the *Migration* projects view.
3. You can view the projects in two formats:
  - a. **Tile view**
    - This view presents each project as a tile. Click  from the view selector in the actions menu to select this view.
    - It is the default view and contains links to the migration workspaces from the set of icons in the tile.
    - You can sort the tiles by **Date Created** or **Alphabetical** from the sort criteria dropdown in the actions menu.
  - b. **List View**
    - This view displays the projects as a list. Click  from the view selector in the actions menu to select this view.
    - This view is useful when you have a large number of projects. Click on a column header to sort the list by its column values.

## Renaming a migration project

1. Sign in to [Quest On Demand](#).
2. From the navigation pane, click **Migrate > Projects** to open the *Migration* projects view.
3. From the top right-hand corner of the project panel, click the **More** icon (3 dots). Then click **Edit**.
4. Revise the project name or description as needed.
5. Click **Save** to save the changes and close the dialog.

## Deleting a migration project

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



4. You can also delete projects from the list view when you select one or more projects and click **Delete**.
5. In the confirmation dialog that opens, click **OK** to confirm the deletion.

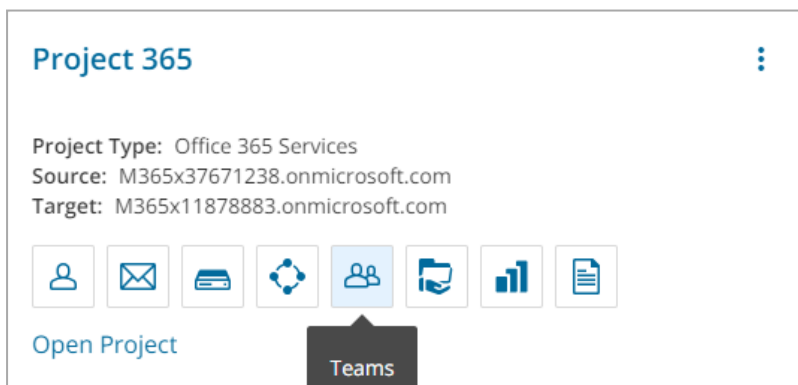
## On Demand Migration Workspaces

Click **Open Project** in the tile view or click a project name in the list view, to open its **project workspace**. The project workspace displays important information about your project and associated reports. The project workspace contains the following tabs:

- [Dashboard](#)
- [Reports](#)

In each project, On Demand Migration also creates **migration workspaces** for each asset class selected for migration. These migration workspaces are logical collections of migration tools for the Office 365 assets and information about the assets in the source and target tenants.

You can go directly to the migration workspace of any asset by clicking the asset icon in the project tile. The icons you see will depend on your role, licenses and the assets selected when the project was created. You can hover over an icon to see the name of the asset type.



# Project Dashboard

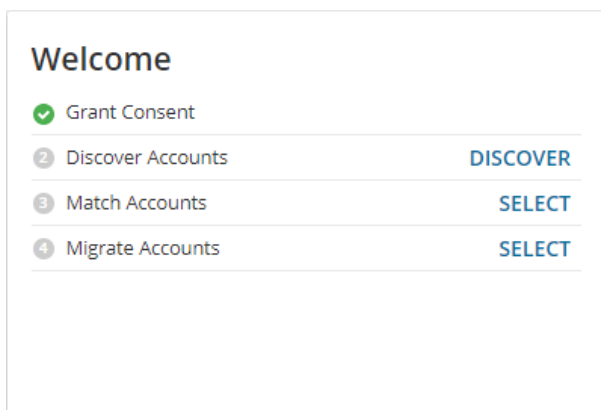
Information about the migration project is summarized on the project dashboard. The tiles that you can see and the features that you can access through the project dashboard depend on your subscription. For information about subscriptions, see [On Demand Global Settings Current User Guide](#).

The screenshot displays the 'Project Dashboard' for a migration project. The top navigation bar includes 'Quest' and 'On Demand' tabs, along with system status 'All Systems Operational' and user information 'Administrator@democorp.com'. The left sidebar contains navigation links: Home, Tenants, Migrate, Recover, Audit, Security, Licenses, Reports, Settings, and Support. The main content area is titled 'Migration > New Project' and features a 'DASHBOARD' tab. The dashboard is organized into several sections: 'Accounts Migration' with a 'Welcome' tile (Grant Consent, Discover Accounts, Match Accounts, Migrate Accounts) and an 'Accounts' tile (Users: 0, Groups: 0, Discovered: 0, Matched: 0, Needs your attention: 0); 'Content Migration' with tiles for 'Mail', 'SharePoint', 'OneDrive', 'Public Folders', 'Teams', 'Active Directory', 'Domain Move', 'Directory Sync', 'Domain Rewrite', and 'Power BI'. Each tile displays migration progress (Discovered, Migrated, Switched) and an 'Open' link to access more details. The 'Events' and 'Tasks' tiles show 'No data' and include a 'Refresh' button. The 'Domain Rewrite' tile features an '@' icon, and the 'Active Directory', 'Domain Move', and 'Directory Sync' tiles feature their respective icons.

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 present 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* migration 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* migration workspace.

## SharePoint

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

## Active Directory, Domain Move, Domain Rewrite and Directory Sync

Click **Open** from the respective tiles to access the Active Directory migration workspace, Microsoft 365 domain move and rewrite services, or directory synchronization services for Microsoft Active Directory and Microsoft Entra ID. For more information see the [Active Directory User Guide](#).

## Power BI

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

## Tasks

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

## Events

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

# Reports

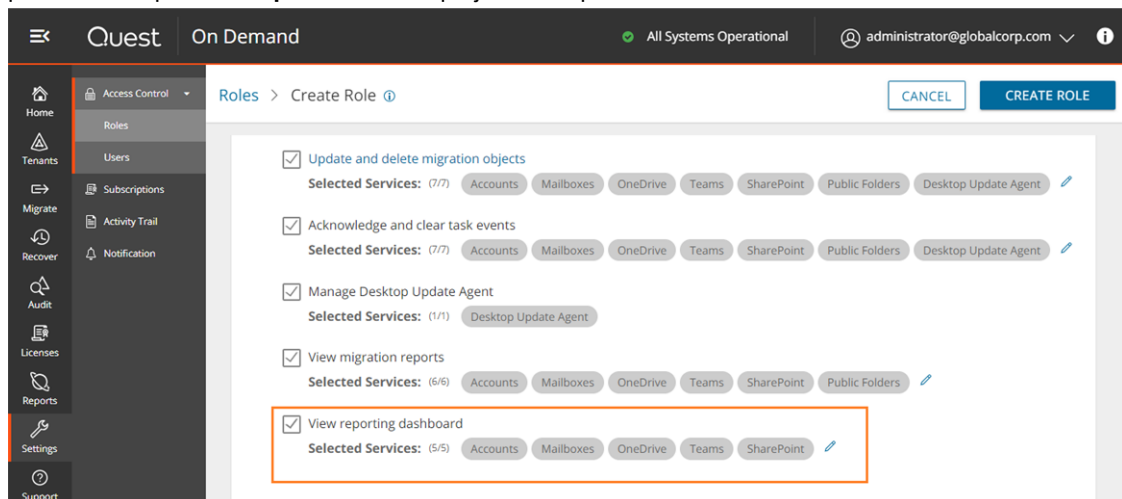
On Demand Migration offers two types of reports:

- [Premigration Reports](#)
- [Comparison Reports](#)
- [Migration Reports](#)

## Activating Premigration and Comparison reports

Premigration reports are protected by Role-based Access Control (RBAC). To activate the premigration reports dashboard, follow the steps below:

1. From the On Demand navigation pane, go to **Settings > Access Control > Roles**.
2. Edit a custom role or create a new role. You cannot edit a predefined On Demand role.
3. Scroll down to the **Migration** section and select the **View reporting dashboard** check box. Granting this permission exposes a **Reports** tab in the project workspace



4. By default, all asset types are included with the permission. You can remove one or more asset types to restrict access those reports.
5. Click **Create Role** to save the settings for a new role or click **Save** to save the settings for an existing role. Users who are assigned this role can see the **Reports** tab in the project workspace and access the reports for the permitted asset types.

## Premigration Reports

Premigration reports provide detailed information about discovery tasks which get information about the various assets in the source tenant which you plan to migrate to the target tenant. These reports can be downloaded as Microsoft Excel files for offline inspection and migration planning.

Premigration reports are generated every time you run a discovery task for an Office 365 asset. The following is a list of discovery task commands that support report generation:

### Accounts

- [Discover All](#)
- [Discover From File](#)
- [Discover From Security Groups](#)
- [Refresh Selected Accounts](#)
- [Collect Statistics](#)

### Mailbox

- [Collect Statistics](#)

### OneDrive

- [Collect Statistics](#)

### SharePoint

- [Discover All Sites](#)
- [Discover Sites from File](#)
- [Discover Site Contents](#)
- [Collect Statistics](#)

### Teams

- [Discover All](#)
- [Discover From File](#)
- [Collect Statistics](#)
- [Provision](#)

### M365 Groups

- [Discover All](#)
- [Discover From File](#)
- [Collect Statistics](#)

### Power BI

- [Discover All Contents](#)
- [Collect Statistics](#)
- [Discover Workspaces](#)
- [Discover Gateways](#)
- [Discover Connections](#)

These reports are accessible from two places:

- **Task details pane**

The screenshot displays the 'Migration > New Migration Project > SharePoint' interface. The 'TASKS' tab is active, showing a table of tasks. The 'Discover All Sites Task' is highlighted, and its details are shown in the right-hand pane. The details pane includes a summary of the task status, type, creation/modification dates, and last operation. At the bottom of the details pane, there are buttons for 'Copy Diagnostics' and 'Download Premigration Report'.

Title	Task Status	Type	Created	Operation
Discover All Sites Task	Completed	DiscoverSiteCollections	Today at 5:06 PM	Started by user
Refresh Project	Completed	ProjectRefresh	Today at 4:35 PM	Started by Project Callback Handler

**Discover All Sites Task**

Task Status	Completed
Type	DiscoverSiteCollections
Created	Monday, October 9, 2023 5:06 PM
Modified	Monday, October 9, 2023 5:09 PM
Last Operation	Started by user
Schedule	Now
Events (4)	4

[Copy Diagnostics](#)

[Download Premigration Report](#)

**To download a premigration report from the task details pane:**

1. Select any discovery task that is completed.
2. From the task details pane, click **Download premigration report**.

• **Reports tab in the project workspace**

Migration > New Migration Project						
DASHBOARD <b>REPORTS</b>						
Asset Type: Any    Type: premigration ✕						
DELETE		EDIT COLUMNS		6 reports, 1 selected    Search		
<input type="checkbox"/>	Task Name	Asset	Type	Content	Created ▼	Expiration
<input type="checkbox"/>	Mailbox Collect Statistics ...	Mailbox	premigration	Download	Today at 5:14 PM	01/07/2024 4:14 PM
<input type="checkbox"/>	OneDrive Collect Statistic...	OneDrive	premigration	Download	Today at 5:11 PM	01/07/2024 4:11 PM
<input type="checkbox"/>	Discover Teams	Teams	premigration	Download	Today at 5:09 PM	01/07/2024 4:09 PM
<input checked="" type="checkbox"/>	Discover All Sites Task	SharePoint	premigration	Download	Today at 5:09 PM	01/07/2024 4:09 PM
<input type="checkbox"/>	Discover Groups	Teams	premigration	Download	Today at 5:09 PM	01/07/2024 4:09 PM
<input type="checkbox"/>	Account Discovery Task	Account	premigration	Download	Today at 4:39 PM	01/07/2024 3:39 PM

The **Reports** list view has the following columns:

- **Task Name** - name of the discovery task. The names indicated here are default names and may be different from task names that you have specified.
- **Asset** - name of the Microsoft 365 asset that is discovered in the source tenant.
- **Type** - type of report. This value should be **premigration**.
- **Content** - link to the Microsoft Excel file that will be downloaded when you click the link.
- **Created** - date and time when the report is created.
- **Expiration** - date and time when the report will expire and the download link will be deactivated. Reports are retained for 90 days.

**To download a premigration report from the project workspace:**

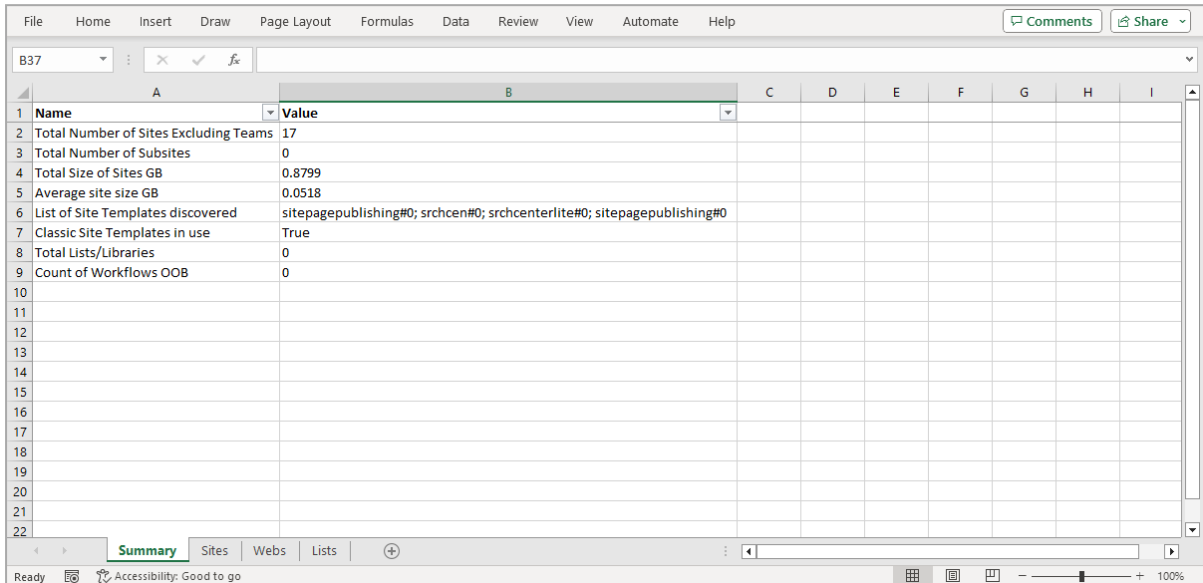
1. Filter the list using the predefined filters: **Asset Type** and **Report Type**.
  - a. Set **Report Type** = premigration
  - b. Set **Asset Type** = Asset you want to get the report, or select 'Any'. The **Asset Type** filter dropdown also indicates the number of reports in the list for each asset type.
2. From the **Content** column click **Download**.



## Analyzing premigration reports

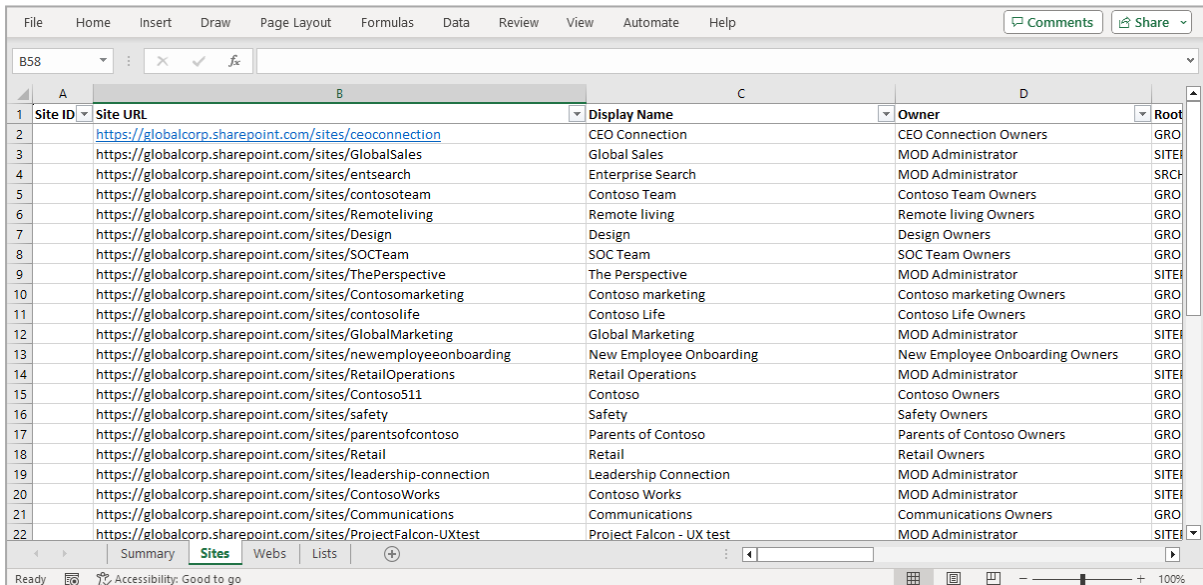
Reports are downloaded as a compressed ZIP file. You must extract the Microsoft Excel report.

Each report has a **Summary** worksheet. Helpful information about the objects discovered by the discovery task are presented in this worksheet.



Name	Value
Total Number of Sites Excluding Teams	17
Total Number of Subsites	0
Total Size of Sites GB	0.8799
Average site size GB	0.0518
List of Site Templates discovered	sitepagepublishing#0; srhccen#0; srhccenterlite#0; sitepagepublishing#0
Classic Site Templates in use	True
Total Lists/Libraries	0
Count of Workflows OOB	0

If the asset type has related objects associated with each item, then more worksheets are added. For example, a SharePoint site discovery report will have additional worksheets like **Webs** and **Lists**. You may have to run additional discovery tasks to access information about related objects.



Site ID	Site URL	Display Name	Owner	Root
2	<a href="https://globalcorp.sharepoint.com/sites/ceoconnection">https://globalcorp.sharepoint.com/sites/ceoconnection</a>	CEO Connection	CEO Connection Owners	GRO
3	<a href="https://globalcorp.sharepoint.com/sites/GlobalSales">https://globalcorp.sharepoint.com/sites/GlobalSales</a>	Global Sales	MOD Administrator	SITEI
4	<a href="https://globalcorp.sharepoint.com/sites/entsearch">https://globalcorp.sharepoint.com/sites/entsearch</a>	Enterprise Search	MOD Administrator	SRCH
5	<a href="https://globalcorp.sharepoint.com/sites/contosoteam">https://globalcorp.sharepoint.com/sites/contosoteam</a>	Contoso Team	Contoso Team Owners	GRO
6	<a href="https://globalcorp.sharepoint.com/sites/Remoteliving">https://globalcorp.sharepoint.com/sites/Remoteliving</a>	Remote living	Remote living Owners	GRO
7	<a href="https://globalcorp.sharepoint.com/sites/Design">https://globalcorp.sharepoint.com/sites/Design</a>	Design	Design Owners	GRO
8	<a href="https://globalcorp.sharepoint.com/sites/SOCteam">https://globalcorp.sharepoint.com/sites/SOCteam</a>	SOC Team	SOC Team Owners	GRO
9	<a href="https://globalcorp.sharepoint.com/sites/ThePerspective">https://globalcorp.sharepoint.com/sites/ThePerspective</a>	The Perspective	MOD Administrator	SITEI
10	<a href="https://globalcorp.sharepoint.com/sites/Contosomarketing">https://globalcorp.sharepoint.com/sites/Contosomarketing</a>	Contoso marketing	Contoso marketing Owners	GRO
11	<a href="https://globalcorp.sharepoint.com/sites/contosolife">https://globalcorp.sharepoint.com/sites/contosolife</a>	Contoso Life	Contoso Life Owners	GRO
12	<a href="https://globalcorp.sharepoint.com/sites/GlobalMarketing">https://globalcorp.sharepoint.com/sites/GlobalMarketing</a>	Global Marketing	MOD Administrator	SITEI
13	<a href="https://globalcorp.sharepoint.com/sites/newemployeeonboarding">https://globalcorp.sharepoint.com/sites/newemployeeonboarding</a>	New Employee Onboarding	New Employee Onboarding Owners	GRO
14	<a href="https://globalcorp.sharepoint.com/sites/RetailOperations">https://globalcorp.sharepoint.com/sites/RetailOperations</a>	Retail Operations	MOD Administrator	SITEI
15	<a href="https://globalcorp.sharepoint.com/sites/Contoso511">https://globalcorp.sharepoint.com/sites/Contoso511</a>	Contoso	Contoso Owners	GRO
16	<a href="https://globalcorp.sharepoint.com/sites/safety">https://globalcorp.sharepoint.com/sites/safety</a>	Safety	Safety Owners	GRO
17	<a href="https://globalcorp.sharepoint.com/sites/parentsofcontoso">https://globalcorp.sharepoint.com/sites/parentsofcontoso</a>	Parents of Contoso	Parents of Contoso Owners	GRO
18	<a href="https://globalcorp.sharepoint.com/sites/Retail">https://globalcorp.sharepoint.com/sites/Retail</a>	Retail	Retail Owners	GRO
19	<a href="https://globalcorp.sharepoint.com/sites/leadership-connection">https://globalcorp.sharepoint.com/sites/leadership-connection</a>	Leadership Connection	MOD Administrator	SITEI
20	<a href="https://globalcorp.sharepoint.com/sites/ContosoWorks">https://globalcorp.sharepoint.com/sites/ContosoWorks</a>	Contoso Works	MOD Administrator	SITEI
21	<a href="https://globalcorp.sharepoint.com/sites/Communications">https://globalcorp.sharepoint.com/sites/Communications</a>	Communications	Communications Owners	GRO
22	<a href="https://globalcorp.sharepoint.com/sites/ProjectFalcon-UXtest">https://globalcorp.sharepoint.com/sites/ProjectFalcon-UXtest</a>	Project Falcon - UX test	MOD Administrator	SITEI

## Comparison Reports

Comparison reports provide detailed information about various assets in the source and target tenants. These reports can be downloaded as Microsoft Excel files for offline inspection, migration planning and verification.

Comparison reports are generated every time you run a Collect Statistics task on a target tenant for an Office 365 asset. The following is a list of task commands that support comparison report generation. Generating comparison reports requires the selection of a specific option in the task wizard. See the topic about the collect statistics task wizard from the links provided in the list below.

### Accounts

- [Collect Statistics](#)

### SharePoint

- [Collect Statistics](#)

### Mailbox

- [Collect Statistics](#)

### Teams

- [Collect Statistics](#)

### OneDrive

- [Collect Statistics](#)

### M365 Groups

- [Collect Statistics](#)

These reports are accessible from two places:

- **Task Details pane**

The screenshot shows the On Demand Migration console interface. The top navigation bar includes 'Migration > Reporting 1025 > Accounts and User Data'. The 'TASKS' tab is selected. A table lists various tasks, including 'Collect OneDrive Statistics Task', which is highlighted. The right-hand pane shows the details for this task, including its status (Completed), type (OneDrive Assessment), and a 'Download Comparison Report' button.

Title	State	Type	Created	Operation
Collect Account Statistics Task	Completed	Account Assessment	12/22/2023 12:24 PM	Collected 71 account statistics
Collect OneDrive Statistics Task	Completed	OneDrive Assessment	12/22/2023 11:38 AM	Started by user
Collect Mailbox Statistics Task	Completed	Mailbox Assessment	12/22/2023 11:37 AM	Collected 27 mailbox statistics from source and 27 fr...
Collect Mailbox Statistics Task	Completed	Mailbox Assessment	12/12/2023 12:25 PM	Collected 27 mailbox statistics from source and 27 fr...
Account Discovery Task	Completed	Discover	12/12/2023 12:21 PM	Discovered 71 accounts
Collect Mailbox Statistics Task	Completed	Mailbox Assessment	12/12/2023 12:17 PM	Collected 3 mailbox statistics from source and 3 from...
Collect Mailbox Statistics Task	Completed	Mailbox Assessment	12/12/2023 12:00 PM	Collected 27 mailbox statistics from source and 27 fr...
Collect OneDrive Statistics Task	Completed	OneDrive Assessment	12/05/2023 11:26 AM	Started by user
Collect Mailbox Statistics Task	Completed	Mailbox Assessment	12/05/2023 11:26 AM	Collected 27 mailbox statistics from source and 27 fr...
Collect Account Statistics Task	Completed	Account Assessment	12/05/2023 11:20 AM	Collected 71 account statistics
Account Matching Task	Completed	Matching	12/05/2023 11:20 AM	Matching
Collect Mailbox Statistics Task	Completed	Mailbox Assessment	10/25/2023 10:59 PM	Collected 27 mailbox statistics from source and 0 fr...
Collect Account Statistics Task	Completed	Account Assessment	10/25/2023 4:51 PM	Collected 71 account statistics
Collect Mailbox Statistics Task	Completed	Mailbox Assessment	10/25/2023 4:41 PM	Collected 27 mailbox statistics from source and 0 fr...
Account Discovery Task	Completed	Discover	10/25/2023 4:22 PM	Discovered 71 accounts

**To download a comparison report from the task details pane:**

1. Select any discovery task that is completed.
2. From the task details pane, click **Download comparison report**.

- **Reports tab in the project workspace**

The **Reports** list view has the following columns:

- **Task Name** - name of the discovery task. The names indicated here are default names and may be different from task names that you have specified.
- **Asset** - name of the Microsoft 365 asset that is discovered in the source tenant.
- **Type** - type of report. Valid values are **comparison** and **premigration**. Select **comparison** in the filter for premigration reports.
- **Content** - link to the Microsoft Excel file that will be downloaded when you click the link.
- **Created** - date and time when the report is created.
- **Expiration** - date and time when the report will expire and the download link will be deactivated. Reports are retained for 90 days.

***To download a comparison report from the project workspace:***

1. Filter the list using the predefined filters: **Asset Type** and **Report Type**.
  - a. Set **Report Type** = comparison.
  - b. Set **Asset Type** = Asset for which you want to get the report, or select 'Any'. The **Asset Type** filter dropdown also indicates the number of reports in the list for each asset type.
2. From the **Content** column click **Download**.

## **Analyzing comparison reports**

Reports are downloaded as a compressed ZIP file. You must extract the Microsoft Excel report. If the asset type has related objects associated with each item, then more worksheets are added. For example, a SharePoint site discovery report will have additional worksheets like **Webs** and **Lists**.

Notice that there are column pairs: one for the source and another for the target tenant. Discrepancies in the statistics between source and target are highlighted in red.

AF34								
	G	I	J	M	N	AA	AB	AC
1	Source Owner	Source Root Web Template	Target Root Web Template	Source Site Type	Target Site Type	Source File Count	Target File Count	Source Sub Sit
2	Global Administrator	SRHCEN#0		SharePoint				
3	MOD Administrator	SITEPAGEPUBLISHING#0	SITEPAGEPUBLISHING#0	SharePoint	SharePoint	23	54	
4	New Employee Onboarding Owners	GROUP#0	GROUP#0	M365 Groups	M365 Groups	115	230	
5	MOD Administrator	SITEPAGEPUBLISHING#0	SITEPAGEPUBLISHING#0	SharePoint	SharePoint	97	238	
6	Communications Owners	GROUP#0	GROUP#0	Teams	Teams	6	12	
7	MOD Administrator	SITEPAGEPUBLISHING#0	SITEPAGEPUBLISHING#0	SharePoint	SharePoint	27	54	
8	MOD Administrator	SITEPAGEPUBLISHING#0	SITEPAGEPUBLISHING#0	SharePoint	SharePoint	81	162	
9	Retail Owners	GROUP#0	GROUP#0	Teams	Teams	53	140	
10	Contoso marketing Owners	GROUP#0	GROUP#0	Teams	Teams	3	6	
11	MOD Administrator	SITEPAGEPUBLISHING#0	SITEPAGEPUBLISHING#0	SharePoint	SharePoint	73	146	
12	MOD Administrator	SITEPAGEPUBLISHING#0	SITEPAGEPUBLISHING#0	SharePoint	SharePoint	47	94	
13	MOD Administrator	SITEPAGEPUBLISHING#0	SITEPAGEPUBLISHING#0	SharePoint	SharePoint	18	70	
14	Remote living Owners	GROUP#0	GROUP#0	Teams	Teams	6	12	
15	U.S. Sales Owners	GROUP#0	GROUP#0	Teams	Teams	14	28	
16	Digital Initiative Public Relations Owners	GROUP#0	GROUP#0	Teams	Teams	9	18	
17	Sales and Marketing Owners	GROUP#0	GROUP#0	Teams	Teams	88	290	
18	MOD Administrator	SITEPAGEPUBLISHING#0	SITEPAGEPUBLISHING#0	SharePoint	SharePoint	61	132	
19	All Company Owners	GROUP#0	GROUP#0	M365 Groups	M365 Groups	1	2	
20	Contoso Team Owners	GROUP#0	GROUP#0	M365 Groups	M365 Groups	47	94	
21	MOD Administrator	SITEPAGEPUBLISHING#0	SITEPAGEPUBLISHING#0	SharePoint	SharePoint	49	98	
22	MOD Administrator	SITEPAGEPUBLISHING#0	SITEPAGEPUBLISHING#0	SharePoint	SharePoint	44	114	
23	MOD Administrator	SITEPAGEPUBLISHING#0	SITEPAGEPUBLISHING#0	SharePoint	SharePoint	16	40	
24	MOD Administrator	SITEPAGEPUBLISHING#0	SITEPAGEPUBLISHING#0	SharePoint	SharePoint	24	48	
25	Leadership Owners	GROUP#0	GROUP#0	M365 Groups	M365 Groups	15	42	
26	SOC Team Owners	GROUP#0	GROUP#0	Teams	Teams	3	6	
27	Contoso Owners	GROUP#0	GROUP#0	Teams	Teams	1	2	
28	Design Owners	GROUP#0	GROUP#0	Teams	Teams	8	16	
29	MOD Administrator	SITEPAGEPUBLISHING#0	SITEPAGEPUBLISHING#0	SharePoint	SharePoint	61	122	
30	Mark & Project Team Owners	GROUP#0	GROUP#0	Teams	Teams	110	220	
31	Global Administrator	SITEPAGEPUBLISHING#0	SITEPAGEPUBLISHING#0	SharePoint	SharePoint	258	526	
32	MOD Administrator	SITEPAGEPUBLISHING#0	SITEPAGEPUBLISHING#0	SharePoint	SharePoint	11	22	
33								
34								
35								
36								
37								
38								

## Migration Reports

Migration Reports display error reports about migration tasks. Additionally, each migration workspace has its own **Reports** tab.

Quest On Demand <span>svitlana.titova@quest.com</span>										
Migration > ST main project > Accounts and User Data										
DASHBOARD ACCOUNTS MAILBOXES ONEDRIVE DESKTOP AGENTS <b>REPORTS</b> EVENTS TASKS										
Object Type: Any Object State: Any Has Failed Items: Any										
<div> <div>ERROR LOG EXPORT EXPORT DELETE EDIT COLUMNS</div> <div>9 reports Search</div> </div>										
<input type="checkbox"/>	Start Time	Completed Time	Source Name	Target Name	Object Type	Object State	Processed Items	Failed Items	Error Log	Expiry Date
<input type="checkbox"/>	Today at 2:01 PM	Today at 2:03 PM	admin@M365x79545562.onmicrosoft.com	admin@M365x51080796.onmicrosoft.com	Mailbox	Migrated	3	0	-	-
<input type="checkbox"/>	Yesterday at 2:23 PM	Yesterday at 2:29 PM	admin@M365x79545562.onmicrosoft.com	admin@M365x51080796.onmicrosoft.com	OneDrive	Migrated	2	0	-	-
<input type="checkbox"/>	Yesterday at 9:55 AM	Yesterday at 10:00 AM	admin@M365x79545562.onmicrosoft.com	admin@M365x51080796.onmicrosoft.com	OneDrive	Migrated	2	0	<a href="#">Download</a>	05/13/2023 10:00 AM
<input type="checkbox"/>	Yesterday at 9:44 AM	Yesterday at 9:48 AM	admin@M365x79545562.onmicrosoft.com	admin@M365x51080796.onmicrosoft.com	OneDrive	Migrated	2	0	<a href="#">Download</a>	05/13/2023 9:48 AM
<input type="checkbox"/>	03/29/2023 11:14 AM	03/29/2023 11:16 AM	admin@M365x79545562.onmicrosoft.com	admin@M365x51080796.onmicrosoft.com	OneDrive	Migrated	2	1	<a href="#">Download</a>	04/28/2023 11:16 AM
<input type="checkbox"/>	03/22/2023 4:43 PM	03/22/2023 4:47 PM	admin@M365x79545562.onmicrosoft.com	admin@M365x51080796.onmicrosoft.com	OneDrive	Migrated	2	1	<a href="#">Download</a>	04/21/2023 4:47 PM
<input type="checkbox"/>	03/22/2023 11:29 AM	03/22/2023 11:31 AM	admin@M365x79545562.onmicrosoft.com	admin@M365x51080796.onmicrosoft.com	OneDrive	Migrated	2	1	<a href="#">Download</a>	04/21/2023 11:32 AM
<input type="checkbox"/>	03/22/2023 10:01 AM	03/22/2023 10:08 AM	admin@M365x79545562.onmicrosoft.com	admin@M365x51080796.onmicrosoft.com	OneDrive	Migrated	2	1	<a href="#">Download</a>	04/21/2023 10:10 AM
<input type="checkbox"/>	03/21/2023 6:03 PM	03/21/2023 6:10 PM	admin@M365x79545562.onmicrosoft.com	admin@M365x51080796.onmicrosoft.com	OneDrive	Migrated	2	1	<a href="#">Download</a>	Next Thursday at 6:12 ...

## About Migration Reports

- The error report for a migration job is a CSV file with one or more rows. The maximum number of rows in the CSV file is 50K. You can download a report by clicking the **Download** link in the **Error Log** column. If there are no migration errors, a download link is not available.
- Error reports are retained for 30 days. You cannot modify this global setting. After 30 days the download link is replaced with the label **Expired** and you can no longer download the report.
- You can select one or more reports and delete them with the **Delete** action. If the reports are active when they are deleted, the row in the table will be removed and the report will be automatically purged after 30 days.
- Access to reports are secured with Role Based Access Control (RBAC). For example, if you have access to only Mail migration, the OneDrive reports are not visible.
- If a migration project is deleted, all associated data will be deleted, and any active reports will be purged after 30 days.

The columns in the reports list are as described below:

- **Start Time** - the date and time the migration task was started.
- **Completed Time** - the date and time the migration task completed.
- **Source Name** - name of the source tenant.
- **Target Name** - name of the target tenant.
- **Object Type** - name of the asset that is migrated.
- **Object State** - the state of the migration. Values are: `Migrated`, `Partially Migrated`, `Migrated with Issues`, `Migration Failed` and `Migration Stopped`.
- **Processed Items** - the number of asset items from the source tenant that were included in the migration.
- **Failed Items** - the number of asset items that could not be migrated successfully.
- **Error Log** - link to the report if available. If there are no migration errors, a download link is not available. After 30 days the download link is replaced with the label **Expired**.
- **Expiry Date** - date and time when the report will expire.

## Exporting Reports

- You can download a single report by clicking the **Download** link in the **Error Log** column. If there are no migration errors, a download link is not available.
- You can select multiple rows and download the reports as a ZIP file when you click **Error Log Export**.
- You can select multiple rows and download the reports list when you click **Export**. Only rows are exported but not the report CSVs.

## Filtering the Reports List

You can use the following predefined filters to retrieve a subset of the reports:

- **Object Type** - name of the asset that is migrated.
- **Object State** - the state of the migration. Values are: `Any`, `Migrated`, `Partially Migrated`, `Migrated with Issues`, `Migration Failed` and `Migration Stopped`.

- **Has Failed Items:** whether or not the migration has any failed items. Values are Yes or No. If there are one or more items that match a Yes or No value, the number of items are indicated as well.

# Working with Lists

Details of assets discovered, their migration states and other pertinent details are displayed in lists.

The screenshot shows a table with columns: Sync, Name, Source Type, Target Type, ODM Licensed, Acc..., Source UPN, Target UPN, Source Group Type, and Target. The table lists various accounts, including All Employees, Allan Deyoung, Ask HR, Automate Bot, Bianca Pisani, Brian Johnson (TA), Cameron White, CEO Connection, and Christie Cline. A detailed view for Bianca Pisani is shown on the right, displaying Source Email, Target Email, Source Type, Target Type, Status, Account State, and Events.

Each list has multiple columns that display properties of the list items. The first column in the list is the list selector. All lists have this column and cannot be hidden.

The list header contains the list selector and column headers.

## To select the columns to display

1. Click **Edit Columns**.
2. From the drop-down, select the columns you want to display, or clear the check boxes of columns you want to hide. The list will be automatically updated to reflect your choices.

## To configure the number of list items displayed on a page

Large lists can be better managed with paging. A long list is divided into smaller subsets called pages. Each page contains a fixed number of items or records. Only one page of data is displayed at a time, with navigation controls allowing users to move between pages.

The screenshot shows a list with two items: Conf Room Crystal and Conf Room Hood. Each item has columns for Name, Source Type, Target Type, ODM Licensed, Acc..., Source UPN, Target UPN, Source Group Type, and Target. At the bottom, there is a pagination bar showing '1-25 of 81 Results' and a 'Show' dropdown set to 25, with navigation controls for page 1 of 4.

At the bottom of lists, the count of items displayed in a page is indicated on the left-hand side, and page controls are available on the right-hand side.

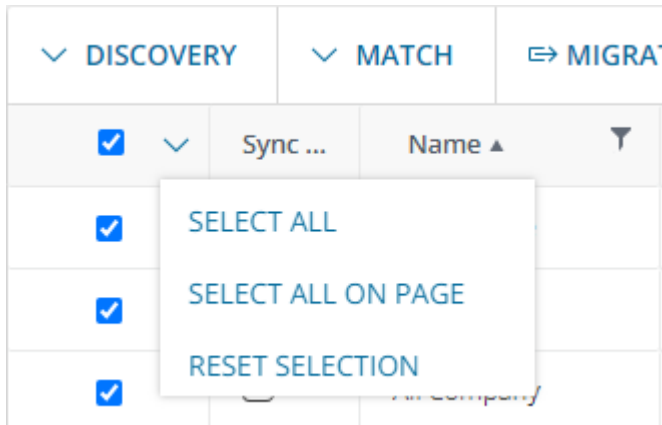
1. Click the **Show** dropdown. Then select the predefined number of items (25, 50 or 100) to display one page.
2. Use the navigation controls to move between pages. The current page number is displayed as you scroll through the pages.

## To select or deselect specific list items

When you want to perform an action on one or more list items, you must select the items.

1. Select the corresponding check box in the list selector column of each list item that you want to select, or clear the check box to deselect the list item. Details of the most recently selected list item is displayed in the details pane that opens.
2. Click anywhere in a specific list item to view the details of the item. Although you can view the list item details, the item is not considered as selected unless you select the check box in the corresponding list selector column.

**To select or deselect multiple list items automatically**



- Select the check box in the list selector column header. All list items across all pages are selected. Alternatively, click the drop down icon in the list selector column header, and then click **Select All**.
- Click the drop down icon in the list selector column header. Then click **Select All on Page** to select all list items on the current page.
- Click **Reset Selection** to clear all previously selected list items across all pages.

## Searching

Lists could be large and hard to manage. You cannot scroll past 10,000 items or rows in a view. Use the Search box above this list to look for items that match your custom criteria.



**To start a search:**

1. Use words, phrases, and special queries in your search.
2. Click **Search** to get the search results. The search is performed across all fields. You can add search criteria to the search using facet filters on the left pane.
3. Click the **X** icon in the filter box to clear the search criteria.



**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\*** could return John Denver, *Johnson* Smith, and *john.denver*. 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	<b>-</b> , <b>NOT</b> (case-sensitive)	-mail* ( NOT mail*)	Excludes items that contain the word starting with "mail".
Include specified content	<b>+</b>	+mail*	Matches items containing "mail" along with the basic search query.
Multiple keywords	Space, <b>OR</b> (case-sensitive), <b>AND</b> (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.
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 cannot scroll past 10,000 items or rows in a view. To see relevant records, you can filter lists based on predefined or custom criteria. The steps to filter a list is the same across all lists.

### Quick Filter

These are predefined filters that display the count of items for each value available in the dropdown list. These values take into consideration any other filter that is already applied.

To apply a filter, select a value from the filter dropdown. You can select values from other dropdown filter lists to apply a combined filter. Filters are applied immediately when selected.



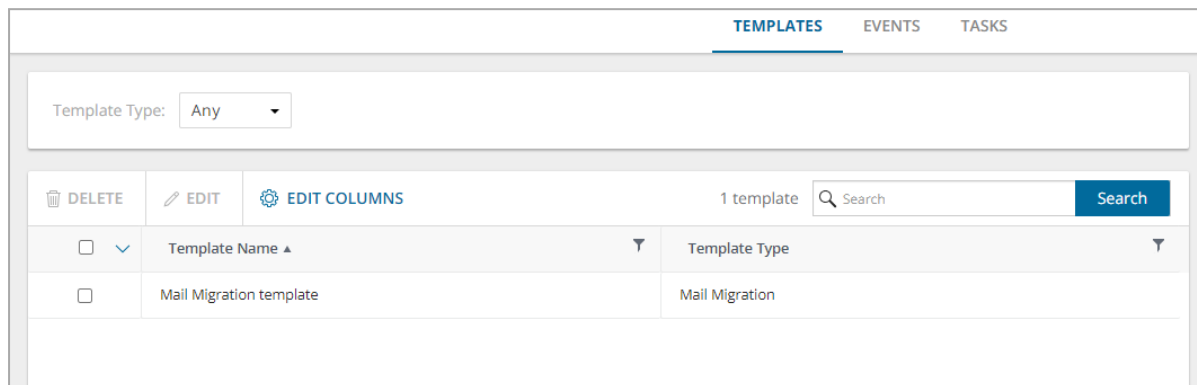
To clear a filter, click the **X** icon in each filter that was applied, or click **Clear All** to clear all filters.

To clear a filter, click the filter icon in the column header where a filter was applied. Click **Clear** to clear the filter.

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# Templates

Templates are named task configurations that you can save and reuse to repeat common tasks like migrating mail, teams, SharePoint content and more. Every migration workspace has a Templates tab. The Templates tab has the following components:



**Template Type** - You can filter the Templates list view with this filter. To apply a filter, select a value from the filter dropdown that lists the various template types available in the Templates list view. Migration workspaces may have one or more template types that are specific to the workspace. For example, **Mail Migration** is a template type in the *Accounts and User Data* migration workspace, and **Migrate SharePoint Contents** is a template type in the *SharePoint* migration workspace.

**Templates list view** - Displays the list of templates saved for reuse from various task wizards that support templates. The columns are as follows:

- **Template Name** - name of the saved template.
- **Template Type** - type of the template.

## Deleting Templates

1. Select one or more templates from the list view that you want to delete.
2. Click **Delete** in the actions menu.
3. Click **Yes** in the *Delete Templates* popup to confirm the action.

## Editing Templates

1. Select a template that you want to edit
2. Click **Edit** in the actions menu. the *Edit <template-type> template* wizard starts.
3. Review and revise the task configurations. You can also change the name of the template if needed. See the associated task wizard for a detailed description about the configuration details.
4. Click **Next** to iterate through each step of the wizard.
5. Click **Finish** to save the template.

## Searching for Templates

Use the Search box above the Templates list to look for items that match your search criteria. See [Searching](#) for more details about entering search criteria.

# Task Management

In this topic:

- [Viewing the task list](#)
- [Viewing task details](#)
- [Scheduling tasks](#)
- [Editing Tasks](#)
- [Stopping and restarting tasks](#)

## Viewing the task list

Each On Demand Migration dashboard has a **Tasks** tab.

Click the **Tasks** tab to see the **Tasks** list. The **Tasks** list displays all the tasks that are initiated throughout the migration process. From the **Tasks** list you can:

- Track the progress of a task and view the results of finished tasks. When you select a task, the task details pane appears and displays the details the detailed information and statistics of the task.
- Filter and search to quickly navigate through the list of tasks.
- Start, stop, and delete tasks.
- Edit tasks

The columns in the **Tasks** list are as described below:

- **Title** - name of the task that is initiated. You can specify custom names for task when they are created from the various task wizards.
- **State** - state of the task as it transitions from initiation to completion.
- **Type** - type of the task. For example, the following are some of the task types that are used in On Demand Migration:

Account	Mailbox	PowerBI
Discovery	Mailbox Assessment	TestPowerBIConnection
Matching	Mail Migration	DiscoverAllContents
Migration	Mailbox Switch	CollectStatistics
Map From File	Address Rewriting	DiscoverWorkspaces
Assign ODM License	Meeting Link Migration	DiscoverGateways
Collect Account Statistics	Calendar Sharing	DiscoverConnections
	Collect Mailbox Statistics	ImportGatewaysMapping
<b>OneDrive</b>		MatchGateways
OneDrive Assessment	<b>SharePoint</b>	CreateNewConnectionProfile

OneDrive Migration	ProjectRefresh	EditConnectionProfile
	DiscoverSiteCollections	AssignConnectionProfile
	DiscoverSharePointContents	DeleteConnectionProfiles
	MatchSharePointContents	MigrateConnections
	MappingFromFileSharePointContents	MapWorkspacesFromFile
	MigrateSharePointContents	MigrateWorkspaces

- **Created** - date and time the task is started.
- **Operation** - description of what the task accomplished.

**NOTE:** Depending on selected task options and content volume, batch processing is used increase the efficiency of the task. It can take a while before processing of the submitted batches is completed. To help track the task, the task status is updated every 5 minutes approximately.

## Viewing task details

The task details pane provides the following information:

- **Name** - name of the task used as the title of the details pane.
- **Type** - type of the task.
- **Created** - date and time the task is started.
- **Modified** - date and time the most recent operation in the task is performed.
- **State** - state of the task as it transitions from initiation to completion. Valid values are *New*, *In Progress*, *Failed*, *Stopped*, *Completed* and *Completed with Issues*. The state of an object is set to *Stopped* when a task is stopped by the user.
- **Last Operation** - most recent operation that the task accomplished.
- **Schedule** - how the task is started. The values are:
  - **Now** - if the task is started immediately after the task wizard is completed.
  - **On Demand** - if the task is started manually.
  - **<timestamp>** - if the task is scheduled to start at a scheduled date and time.
- **Events** - number of events that occurred during the task.
- **Priority** - where available, this property indicates the precedence level of this object if it is included in a migration task where the priority is set in the *Schedule* step of the migration wizard. Values are: *Highest*, *High*, *Medium*, *Low* and *Lowest*. The default priority is *Medium*. If the system is busy, the objects are queued. When the system accepts new migration work, objects are taken from the queue based on the assigned priority and age in the queue.

Click **Copy Diagnostics** to copy relevant task properties to the clipboard. You can then paste the properties in a text file and provide the information to Technical Support for troubleshooting or use the properties in PowerShell commands. The information that is copied to the clipboard is described below:

- **Organization ID** - unique identifier of the Quest On Demand organization.
- **Deployment Region** - Azure region code. Each Azure geography contains one or more regions that are used for specific data residency and compliance requirements.

- **Organization Name** - name of the Quest On Demand organization.
- **Project ID** - unique identifier of the migration project.
- **Task ID** - unique identifier of the task.

## Scheduling tasks

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

- **Run now** - task runs immediately.
- **Run later** - task must be started manually.
- **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.

## Editing tasks

From the **Tasks** list you can edit previously created tasks to reuse them in one of three ways:

- [Editing a completed task](#)
- [Editing a running task](#)
- [Editing a task that has not started](#)

### Editing a completed task

You can edit a completed task. Depending on the 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 the start for the changed task in case **Schedule** option is selected. All changes will be applied after the task is restarted.



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

### Editing a running task

You can edit a running task to reuse or restart it. Depending on the 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 undo this operation after the wizard is finished to reset the edited task to initial settings.

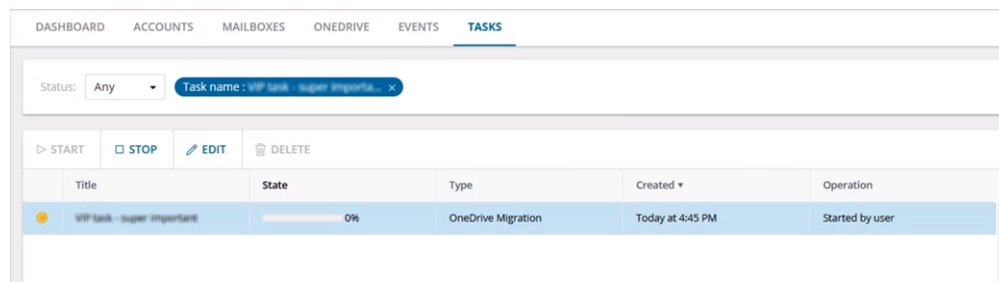
## Editing a task that has not started

You can edit task in case it is not started to change your settings. Depending on the 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 undo this operation after the wizard is finished to reset the edited task to initial settings.

## Stopping and restarting tasks



The screenshot shows the 'TASKS' tab in the On Demand Migration interface. At the top, there are navigation tabs: DASHBOARD, ACCOUNTS, MAILBOXES, ONEDRIVE, EVENTS, and TASKS. Below these, there's a search bar with 'Status: Any' and a task name filter 'Task name: VIP task - super important'. A toolbar contains buttons for START, STOP, EDIT, and DELETE. The main table lists tasks with columns: Title, State, Type, Created, and Operation. One task is listed: 'VIP task - super important' with a progress bar at 0%, Type 'OneDrive Migration', Created 'Today at 4:45 PM', and Operation 'Started by user'.

Title	State	Type	Created	Operation
VIP task - super important	0%	OneDrive Migration	Today at 4:45 PM	Started by user

### To stop a running task:

1. Open the On Demand Migration **Tasks** tab.
2. From the tasks list, click the running task. The **Stop** button is activated.
3. Click **Stop**.
4. A confirmation dialog appears. Click **Stop**

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

### To restart a stopped task:

1. Open the On Demand Migration **Tasks** tab
2. Select a task where the **State** is "Stopped". The **Start** button is now enabled.
3. Click **Start**.
4. A confirmation dialog appears. Click **Start**.



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

# Event Management

Each On Demand Migration dashboard has a **Events** tab.

Click the **Events** tab to see the **Events** list. The **Events** list displays all the events related to tasks that are initiated throughout the migration process. It lets you:

- View all events related to a task. Use [search](#) or [filtering](#) to quickly retrieve events of interest.
- View details related to the event on the right hand pane when you select an event.
- Hide certain alerts from the list by using the **Acknowledge** option. This might be useful if you don't want to be distracted by the accidental warning or "expected" error.
- Export selected events into comma-separated values (CSV) file for analytic or archival purposes.
- Look for resolutions to error events. In the event detail pane, click **Find a Possible Resolution** to look for a solution from among the applicable Knowledge Base (KB) articles in the Quest website. If there is no solution found, the KB article search page is displayed.

  
 **Failed to match accounts**

Object	
Task	<a href="#">Account Matching Task</a>
Time	Friday, November 17, 2023 11:30 AM
Category	Matching

The number of selected accounts exceeds the license limit.  
Select fewer accounts or purchase additional licenses.  
Accounts that require licenses in task: 29,  
Total licenses: 2,  
Available licenses: 2

[Find a Possible Resolution](#)

## Sensitivity Labels

Sensitivity labels in Azure are part of a broader information protection strategy to ensure that sensitive data is identified, classified, and appropriately protected, enhancing security and compliance across your organization. Sensitivity labels are a feature within the Microsoft Purview Information Protection solution (formerly part of Azure Information Protection).

The primary goal of sensitivity labels is to ensure that sensitive information is properly protected throughout its lifecycle. This includes:

- Classifying data based on its sensitivity level (e.g., "Confidential", "Highly Confidential").
- Protecting data by applying security settings, such as encryption, rights management, or watermarking.
- Governance of how sensitive data is shared, accessed, and retained.

Sensitivity labels are integrated into various Microsoft 365 apps, such as Outlook, Word, and Teams, and protect sensitive information across Microsoft 365 services (like Word, Excel, PowerPoint, SharePoint, and OneDrive) and

other cloud services. They allow seamless classification and protection of emails, documents, and other content directly from within the apps.

For more information about Sensitivity labels, see the Microsoft article [Get started with sensitivity labels](#).

Sensitivity label definitions are not migrated. After you create the labels in the target tenant, you can discover and match the labels between your tenants to prepare On Demand Migration to migrate items with these labels across your tenants.

The Sensitivity column on migrated files with sensitivity labels may not be immediately updated. The population of the Sensitivity column is performed by a SharePoint timer job. Sensitivity labels can also be confirmed in the file details or by downloading and opening the file in the appropriate Office application.

**IMPORTANT:** The **Sensitivity** column (a system column that can be added to the view in a SharePoint Library) for migrated files with sensitivity labels may not be immediately updated. The population of the **Sensitivity** column is performed by a SharePoint timer job. Sensitivity labels can also be confirmed in the file details or by downloading and opening the file in the appropriate Office application.

In this topic:

- [Prerequisites](#)
- [Sensitivity Labels List View](#)
- [Discovering Sensitivity Labels](#)
- [Matching Sensitivity Labels](#)
- [Exporting Sensitivity Labels](#)
- [Deleting Sensitivity Labels](#)
- [Migrating data with sensitivity labels](#)

## Prerequisites

The following application consents must be granted:

### AIP protected content migration - Read

This application is required for the source tenant to migrate Sensitivity Labels applied to emails, calendar items, Office files and PDFs in Mail, OneDrive, SharePoint and Teams migrations. It cannot be used for the target tenant. The consent granted with this application is the minimal consent required to allow On Demand Migration to read from the Microsoft Information Protection Sync Service and the Azure Rights Management Service.

### AIP protected content migration - Write

This application is required for the target tenant to migrate Sensitivity Labels applied to emails, calendar items, Office files and PDFs in Mail, OneDrive, SharePoint and Teams migrations. It cannot be used for the source tenant. The consent granted with this application is the consent required to allow On Demand Migration to read from the Microsoft Information Protection Sync Service and write to the Azure Rights Management Service.

## Sensitivity Labels List View

The Sensitivity Labels List View is comprised of the following components:

**Notification panel** - presents relevant information and shortcuts to migration activities. It appears only when there is a notification.

**Filter panel** - consists of predefined filters for the Sensitivity List view. The predefined filters are:

- **Status** - tracks the state of the account from discovery to migration from source to target tenant. See the Status column description below for a description of each status:



**List View Actions Menu** - contains links to sensitivity label activities and the search box. Each action is explained in greater detail in subsequent topics. See [Searching](#) for more information about working with the search box.

**List View Columns** - displays information about sensitivity labels in the source and target tenant. Some columns may be hidden by default. Use **Edit Columns** to show or hide columns in the list. The columns are as described below:

- **Source Label** - Sensitivity Label discovered in the source tenant.
- **Target Label** - Sensitivity Label in the target tenant.
- **Status** - tracks the state of the sensitivity label from discovery to migration from source to target tenant. The description of each status is provided in the table below:

Column Value	Description
Discovered	Sensitivity Labels have been discovered in the source tenant.
Matching	Sensitivity Labels are being matched.
Matched	Sensitivity Labels have been successfully matched.
Match Failed	Sensitivity Labels matching task encountered one or more errors and did not complete.
Stopped	Sensitivity Labels matching task was stopped by a user.

- **Source Active** - indicates whether or not the label is active in the source tenant.
- **Source Description** - description for the label in the source tenant defined by the administrator.
- **Target Active** - indicates whether or not the label is active in the target tenant.
- **Target Description** - description for the label in the target tenant defined by the administrator.

## Discovering Sensitivity Labels

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. From the **Sensitivity Labels** tile on the project dashboard click **Open**. Then select the **Sensitivity Labels** tab.
5. Click **Discover All** in the menu. The *New Discover Sensitivity Labels Task* wizard starts. Each step is described below:
6. **Start**
  - a. **Task Name** - You can specify a custom name. The default name is **Discover Sensitivity Labels Task**.
  - b. Click **Next**.
7. **Notification**
  - a. **Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
    - **Only in a case of failure** - Select this option to send the email if the discovery task fails to complete successfully.

- b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
- 8. **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** - task runs immediately.
    - **Run later** - task must be started manually.
    - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
  - b. Click **Next**.
- 9. **Summary**
  - a. Verify the task specifications as described below:
    - i. **Name** - name of the task. The default name is **Discover Sensitivity Labels Task**. You can specify a custom name.
    - ii. **Source tenant** - name of the source tenant.
    - 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.
- 10. When the task completes, the *Sensitivity Labels* list is updated.

## Matching Sensitivity Labels

There are two ways you can match sensitivity labels from the source to sensitivity labels in the target tenant:

- [Matching labels selected from the list](#)
- [Matching label from a CSV file](#)

### Matching labels selected from the list

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **Sensitivity Labels** tile, or click **Open** from the Sensitivity Labels tile to open the *Sensitivity Labels* workspace.
5. Select the **Sensitivity Labels** tab and click **Match > Match Selected**. The *New Sensitivity Labels Matching Task* wizard starts. Each step is described below:
6. **Start**
  - a. **Task Name** - You can specify a custom name. The default name is **Sensitivity Labels Matching Task**.
7. **Matching**
  - a. **Clear existing matches** - select this option to clear previous matches of the selected sensitivity labels. The task clears only the match information stored in the On Demand repository, and does not

impact the tenants.

- b. **Match by path attribute** - select this option to match labels based on the relative path of the selected sensitivity labels.
- c. Click **Next**.

#### 8. Notification

- a. **Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
  - **Only in a case of failure** - Select this option to send the email if the discovery task fails to complete successfully.
- b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.

#### 9. 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** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- b. Click **Next**.

#### 10. Summary

- a. Verify the task specifications as described below:
  - i. **Name** - name of the task. The default name is **Sensitivity Labels Matching Task**. You can specify a custom name.
  - ii. **Source tenant** - name of the source tenant.
  - iii. **Target tenant** - name of the target tenant.
  - 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.

11. When the task completes, the *Sensitivity Labels* list is updated.

## Matching labels from a CSV file

The CSV file lets you specify the labels that you want to match and ignore the rest. You can then use this file in the *New Sensitivity Labels Matching from File Task* wizard to match labels from the source to the target tenant.

The steps are as follows:

- [Download the relevant CSV template.](#)
- [Prepare the CSV file.](#)
- [Start the Sensitivity Labels Matching from File Task.](#)

## Download the relevant CSV template

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **Sensitivity Labels** tile, or click **Open** from the Sensitivity Labels tile to open the *Sensitivity Labels* workspace.
5. Select the **Sensitivity Labels** tab and click **Match > Match from file**. The *New Sensitivity Labels Matching from File Task* wizard starts. Each step is described below:
6. **Start**
  - a. **Task Name** - You can specify a custom name. The default name is **Sensitivity Labels Matching from File Task**.
7. **Matching File**
  - a. Click **Download Example File** for the template that you want to use: One uses label ids and the other uses path and label names.
  - b. Click **Cancel** to exit the wizard.

## Prepare the CSV file

1. Create a CSV file and add the attributes of the sensitivity label that you want to use to match the source with the target tenant labels. You can use any of the two formats shown below:
  - a. **Format 1 Using sensitivity label ids**
    - a. **SourceSensitivityLabelId** - GUID of the label from the Microsoft Purview portal of the source tenant.
    - b. **TargetSensitivityLabelId** - GUID of the label from the Microsoft Purview portal of the target tenant.
  - b. **Format 2 Using label paths and names**
    - a. **SourceLabelPath** - relative path and name of the sensitivity label in the source tenant.
    - b. **TargetLabelPath** - relative path and name of the sensitivity label in the target tenant.
2. Save the CSV file that you created.

## Start the Sensitivity Labels Matching 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 **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **Sensitivity Labels** tile, or click **Open** from the Sensitivity Labels tile to open the *Sensitivity Labels* workspace.
5. Select the **Sensitivity Labels** tab and click **Match > Match from file**. The *New Sensitivity Labels Matching from File Task* wizard starts. Each step is described below:
6. **Start**
  - a. **Task Name** - You can specify a custom name. The default name is **Sensitivity Labels Matching from File Task**.

## 7. Matching File

- a. Click **Browse** and select the CSV file with the sensitivity label specifications that you prepared.
- b. Click **Next**.

## 8. Notification

- a. **Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
  - **Only in a case of failure** - Select this option to send the email if the discovery task fails to complete successfully.
- b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.

## 9. 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** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- b. Click **Next**.

## 10. Summary

- a. Verify the task specifications as described below:
  - i. **Name** - name of the task. The default name is **Sensitivity Labels Matching from File Task**. You can specify a custom name.
  - ii. **Source tenant** - name of the source tenant.
  - iii. **Target tenant** - name of the target tenant.
  - 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.

11. When the task completes, the *Sensitivity Labels* list is updated.

## Exporting Sensitivity Labels

1. Select one or more sensitivity labels from the list view that you want to export.
2. Click **Export** in the actions menu.
3. Open the CSV file by extracting it from the ZIP file that is downloaded to your computer.

## Deleting Sensitivity Labels

1. Select one or more sensitivity labels from the list view that you want to delete.
2. Click **Delete** in the actions menu.
3. Click **Yes** in the *Delete Sensitivity Label* popup to confirm the action.

## Migrating data with sensitivity labels

Sensitivity Labels are not migrated. On Demand Migration migrates your Microsoft 365 data assets like Mailboxes, OneDrive, and SharePoint files that are tagged with sensitivity labels. You can control what happens to the labels when the data is migrated through the following migration wizards:

- [New Mail Migration Task wizard](#)
- [New OneDrive Migration Task wizard](#)
- [New Teams Migration Task wizard](#)
- [New SharePoint Migration Task wizard](#)

# Account Migration

In this chapter:

- [Account and User Data Migration Workspace](#)
- [What We Migrate](#)
- Preparation
  - [Configuring Connections](#)
  - [Calendar Sharing](#)
  - [Discovering Accounts](#)
  - [Exporting Accounts](#)
  - [Managing Accounts with Collections](#)
  - [Premigration Assessment](#)
- Migration
  - [Matching and Mapping Accounts](#)
  - [Migrating Accounts](#)
- Post-migration
  - [Domain Coexistence](#)

## What We Migrate

The On Demand Migration service for Accounts migration support for the listed attributes of user account types is indicated in the table below:

Attribute	Non Mail Enabled User	Mail Enabled User	Mailbox Enabled User	Notes
AccountStatus	✓	✓	✓	
Alias	✗	✓	✓	
City	✓	✓	✓	
Country	✓	✓	✓	

Attribute	Non Mail Enabled User	Mail Enabled User	Mailbox Enabled User	Notes
Department	✓	✓	✓	
DisplayName	✓	✓	✓	
ExternalEmailAddress	✓	✓	✓	
Fax	✓	✓	✓	
HomePhone	✓	✓	✓	includes Business Phone and Mobile Phone.
LastName	✓	✓	✓	
MailNickname	✓	✓	✓	
Name	✓	✓	✓	
PhysicalDeliveryOfficeName	✓	✓	✓	
PostalCode	✓	✓	✓	
PreferredDataLocation	✓	✓	✓	
RecipientTypeDetails	✓	✓	✓	
StateOrProvince	✓	✓	✓	
StreetAddress	✓	✓	✓	
TelephoneNumber	✓	✓	✓	
UserPrincipalName	✓	✓	✓	
Visibility	✓	✓	✓	
UsageLocation	✓	✓	✓	

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 )
- membership approval
- delivery management
- message approval
- MailTip
- group delegation
- visibility in GAL

- **Distribution lists**

- ownership (for accounts that have a pair on the target tenant )
- membership ( for accounts that have a pair on the target tenant )
- membership approval
- delivery management
- message approval
- MailTip
- group delegation
- SendAs and SendOnBehalf group delegates
- visibility in GAL

## Migrating distribution lists with group delegations

On Demand migrates distribution lists with group delegations like **SendAs** and **SendOnBehalf**, including scenarios where the distribution list in the target exists or does not exist, or exists and does or does not have group delegations. When the distribution list with group delegations exists in the target then only newly added group delegations are migrated, and 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.

Delegated accounts 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 the following delegated account types 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



**NOTE:** The temporary Migration Service account of the target tenant will be added as an owner to all target mail-enabled security groups, distribution groups and Microsoft 365 Groups.

# Accounts and User Data Migration Workspace

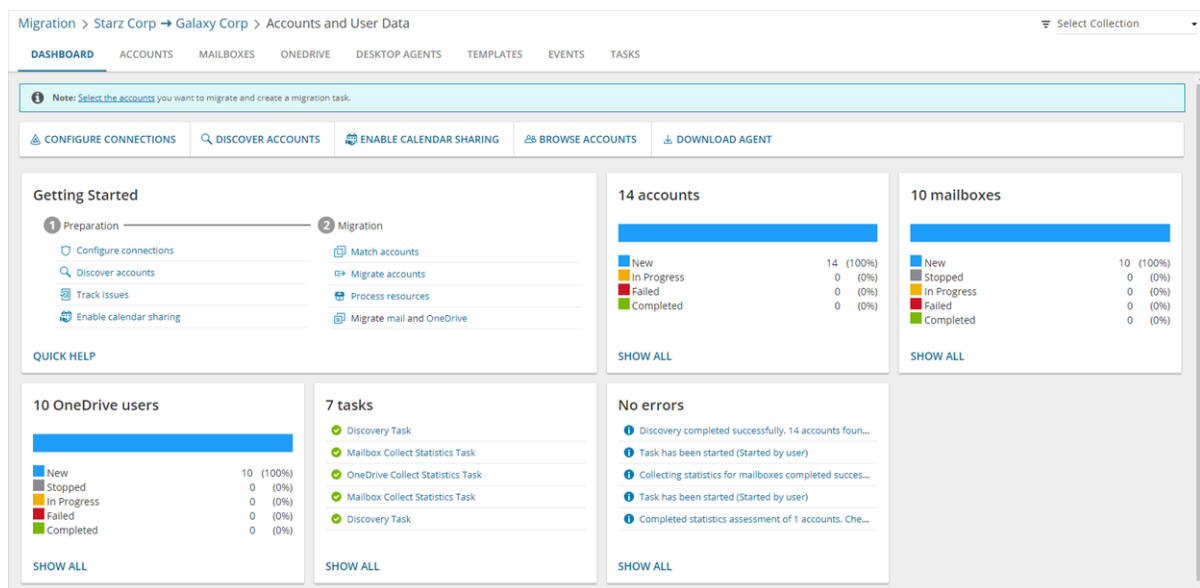
In this topic:

- [Dashboard](#)
- [Accounts List View](#)
- [Accounts Assessment](#)
- [Account Details](#)



**NOTE:** The *Accounts and User Data* migration workspace is common for the Accounts, Mailbox and OneDrive migration services, and the Desktop Agents.

## Dashboard



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.

## Dashboard Tiles

- **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 *Accounts 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 migration 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 migration workspace. The title displays the total number of events. Click **Show All** to open the *Events List view*.

## Accounts List View

Migration > New Migration Project > Accounts and User Data Select Collection

DASHBOARDACCOUNTSMAILBOXESONEDRIVEDESKTOP AGENTSEVENTSTASKS

Note: Select the accounts you want to migrate and create a migration task.

List ViewAssessmentAccount State: AnyMatching: AnySource Type: AnyTarget Type: AnyEnvironment: AnyODM Licensed: Any

DISCOVERYMATCHMIGRATENEW COLLECTIONADD TO COLLECTIONMORE ACTIONSEDIT COLUMNS78 accountsSearchSearch

<input type="checkbox"/>	Sync ...	Name	Source Type	Target Type	ODM Licensed	Account State	Source UPN	Target UPN	Source Group Type	Target Group Type	Title	Depa.
<input type="checkbox"/>		Adele Vance	Mailbox-Enabled User		Yes	Discovered	AdeleV@M365x82...	-	-	-	Retail Ma...	Retail
<input type="checkbox"/>		Alex Wilber	Mailbox-Enabled User		Yes	Discovered	AlexW@M365x82...	-	-	-	Marketin...	Marke
<input type="checkbox"/>		All Company	Microsoft 365 Group		Not required	Discovered	-	-	Assigned	-	-	-
<input type="checkbox"/>		All Employees	Distribution Group		Not required	Discovered	-	-	Assigned	-	-	-
<input type="checkbox"/>		Allan Deyoung	Mailbox-Enabled User		Yes	Discovered	AllanD@M365x82...	-	-	-	IT Admin	IT
<input type="checkbox"/>		Ask HR	Microsoft 365 Group		Not required	Discovered	-	-	Assigned	-	-	-
<input type="checkbox"/>		Automate Bot	Non-Mail-Enabled User		Yes	Discovered	AutomateB@M36...	-	-	-	-	-
<input type="checkbox"/>		Bianca Pisani	Non-Mail-Enabled User		Yes	Discovered	BiancaP@M365x8...	-	-	-	Salespers...	Sales
<input type="checkbox"/>		Brian Johnson (TA...	Mailbox-Enabled User		Yes	Discovered	BrianJ@M365x829...	-	-	-	-	-
<input type="checkbox"/>		Cameron White	Non-Mail-Enabled User		Yes	Discovered	CameronW@M36...	-	-	-	Salespers...	Sales
<input type="checkbox"/>		CEO Connection	Microsoft 365 Group		Not required	Discovered	-	-	Assigned	-	-	-

1-25 of 78 ResultsShow 251/4

The Accounts List View is comprised of the following components:

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

**Filter panel** - consists of predefined filters for the Accounts List view and tabs to switch between the Accounts List view and the Assessment view. See [Filtering](#) for more information about working with filters. The predefined filters are:

- **Account State** - returns a list of Accounts by specific state values. See **Account State** column description in the **List View** below for a list of values.
- **Matching** - returns a list of Accounts by source accounts that are matched with a target account. Valid values are *Any*, *Matched* and *Not matched*.
- **Source Type** and **Target Type** - search by specific account types as defined in Active Directory.
  - 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 Group - Dynamic, Microsoft 365 - Assigned, Security - Dynamic, Security - Assigned, Teams - Dynamic and Teams - Assigned.
- **Environment** - returns a list of Accounts by 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 Accounts list.
- **ODM Licensed** - returns a list of Accounts by license utilization. Valid values are *Yes*, *No*, *Not required*.

**List View Actions Menu** - contains links to account migration activities and the search box. Each action is explained in greater detail in subsequent topics. See [Searching](#) for more information about working with the search box.

**List View Columns** - displays information about accounts in the source tenant and the migration status of each account. Some columns are hidden by default. Use **Edit Columns** to show or hide columns in the list. The columns are as described below:

**i** **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.
- **Name** - name of the account
- **Source Type** - account type defined in Microsoft Active Directory for the source tenant. 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 Group, Security Group, Teams.
- **Target Type** - account type defined in Microsoft Active Directory for the target tenant. 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 Group, Security Group, Teams.
- **ODM Licensed** - indicates whether or not an On Demand Migration license has been consumed when the migration task is started. Values are *Yes*, *No*, *Not required*.
- **Status** - status of the most recent task that was run for this account. Valid values are *New*, *Stopped*, *In Progress*, *Failed* and *Completed*. The **Status** column displays a progress bar that tracks the update for each account when the Matching and Migration tasks are running.
- **Account State** - tracks the state of the account from discovery to migration from source to target tenant. The column values are as follows:

Column Value	Description
Discovered	Account has been discovered in the source tenant.
Match failed	Account matching failed
Matched	Account has been successfully matched.
Matching	Account is being matched.
Matching Stopped	Account matching task was stopped by a user.
Mapped	Account mapping is complete and successful.
Mapping	Account mapping of this object has started.
Mapping Failed	Account mapping did not succeed.
Mapping Stopped	Account mapping task was stopped by a user.
Migrated	Account migration is complete and successful.
Migrated with Issues	Account migration completed with errors.
Migrating	Account migration of this object has started.
Migration failed	Account migration did not succeed
Migration stopped	Account migration canceled by the user

- **Source UPN** - account name in the source tenant in the format of an email address based on the Internet standard RFC 822.
- **Target UPN** - account name in the target tenant in the format of an email address based on the Internet standard RFC 822.
- **Source Mailbox** - account mailbox in the source tenant.
- **Target Mailbox** - account mailbox in the target tenant.
- **Source Group Type** - group membership type in the source tenant. Valid values are **Assigned** or **Dynamic**.
  - **Assigned** - indicates that members are manually added or removed from the group.
  - **Dynamic** - indicates that users are added or removed dynamically once the membership rules are defined.

- **Target Group Type** - group membership type in the target tenant. Valid values are **Assigned** or **Dynamic**.
  - **Assigned** - indicates that members are manually added or removed from the group.
  - **Dynamic** - indicates that users are added or removed dynamically once the membership rules are defined.
- **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.
- **Collections** - indicates the most recent collection where the account is added and the number of additional collections that also contain this object.

## 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](#).

## Account Details

When you select an account from the List View, the Account Detail pane opens. The information in the pane is described below:

- **Source Email** - email address of the selected account in the source tenant.
- **Target Email** - email address of the selected account in the target tenant.
- **Source Type** - account type defined in Microsoft Active Directory for the source tenant.
- **Target Type** - account type defined in Microsoft Active Directory for the target tenant.
- **Status** - status of the selected account. Valid values are New, In Progress, Failed and Completed.
- **Account State** - tracks the state of the account from discovery to migration from source to target tenant.
- **Events** - count of the events that occurred during account processing through one or more tasks.
- **Collections** - list of collections that contain the selected account.
- **Tasks** - list of tasks invoked for the selected account.

# Configuring Connections

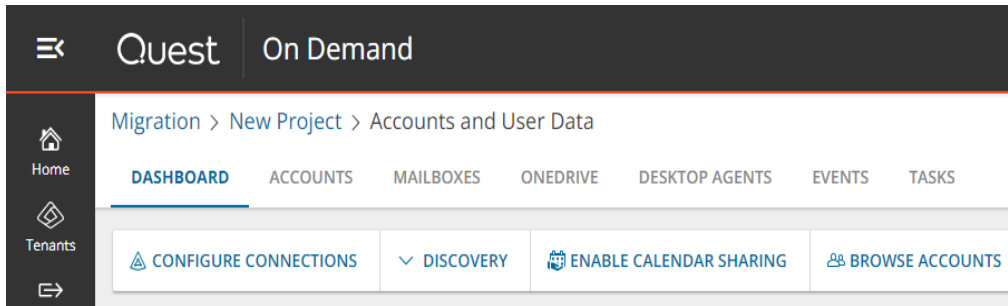
You can re-configure connections from the account migration Dashboard as described below.



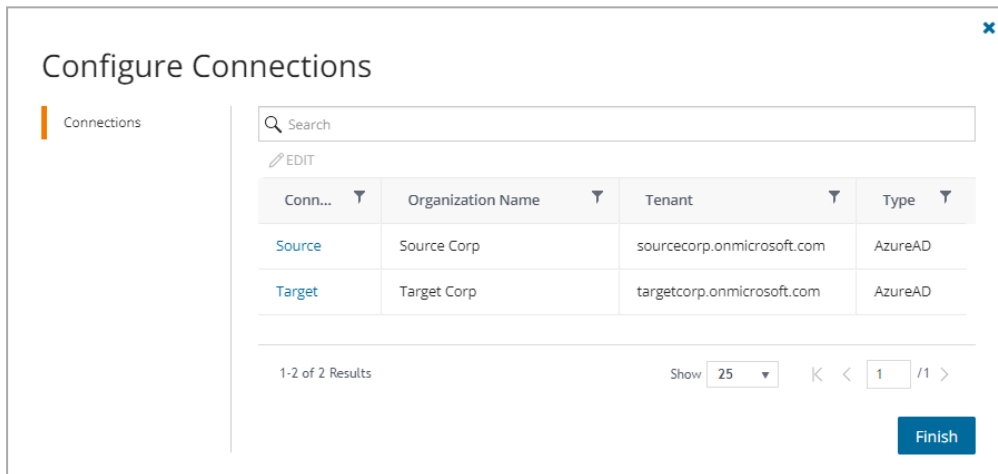
**NOTE:** Multi-factor Authentication (MFA) is not supported for accounts whose credentials are entered explicitly when configuring connections for provisioning OneDrive on the target tenant.

***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 **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click **Accounts**. The *Accounts and User Data* migration workspace opens.. Then click **Dashboard**.



5. Click **Configure Connections** from the Dashboard menu.
6. From the *Configure Connection* wizard select the source or target tenant that you want to configure. Then click **Edit**.



7. Configure the settings as described below:
  - **Specify the credentials of a user with the Global Administrator or SharePoint Administrator role (for target tenant only)** - enter the credentials of a user account that has the Global Administrator or SharePoint Administrator role to activate the ability to provision OneDrive accounts in the target tenant.

**Configure Connection**

Microsoft Entra ID Tenant: targetcorp.onmicrosoft.com

**Specify the credentials of a user with the Global Administrator or SharePoint Administrator role for the following operation**

- Automatic OneDrive target provisioning before migration

UserPrincipalName

Password

**Specify the UserPrincipalName of an active user account**

This account is required for the following operations. The account does not need any permissions, and must not be deactivated or deleted.

- Accounts (Discovery, Matching, Migration, Collect Statistics)
- Mail (X500, Permissions, Forwarding, Collect Statistics, Auto Replies, Calendar Sharing, Litigation Hold, Enable Archive)

UserPrincipalName

Use specified EWS endpoint, e.g., <https://outlook.office365.com/EWS/Exchange.asmx>.  
If the EWS URL is not specified, the Autodiscover service will be used to locate the endpoint.

Custom EWS URL

**Save** **Cancel**

- **Specify the UserPrincipalName of an active user account** - The account does not need any permissions. It cannot be an external or guest account, and must not be deactivated or deleted. The UserPrincipalName should not have any special characters. Allowed characters are (a to z, A to Z, 0 to 9, . \_ - @). This account is required for the following operations.
  - Accounts (Discovery, Matching, Migration, Collect Statistics)
  - Mail (X500, Permissions, Forwarding, Collect Statistics, Auto Replies, Calendar Sharing, Litigation Hold, Enable Archive)
- **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.

8. Click **Save** to commit your changes.
9. When both source and target connections are configured, click **Finish**.

## 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.

**i NOTE:** Account discovery is deactivated if basic migration consents are missing from either the source or the target tenant.

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 Accounts list (Accounts tab > List View). If there are changes to an account from a previous discovery, the account will be updated if the account is rediscovered by the task.



In this topic:

- [Discovering all accounts automatically](#)
- [Discovering accounts from a file](#)
- [Discovering accounts from a file using security groups](#)
- [Refreshing Selected Accounts](#)
- [Reviewing the Account Discovery Task](#)
- [Reviewing the Account Discovery Task Events](#)

## Discovering all accounts 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 **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. From the *Accounts* tile on the project dashboard click **Open**. The *Accounts and User Data* migration workspace opens.
5. Open the *Accounts* tab . From the *List View* menu, click **Discovery** and then select **Discover All**. The *New Account Discovery Task* wizard starts.
6. **Notification**
  - a. **Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
    - **Only in a case of failure** - Select this option to send the email if the discovery task fails to complete successfully.
  - b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
  - c. Click **Next**.
7. **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** - task runs immediately.
    - **Run later** - task must be started manually.
    - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
  - b. Click **Next**.
8. **Summary**
  - a. Verify the task specifications as described below:
    - **Name** - name of the task. You can specify a custom name. Default name is **Account Discovery Task**.

- **Source tenant** - name of the source tenant in this project.
  - **Discover Type** - discovery option that is selected. Value is set to **All**.
  - **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. The task will start as scheduled.

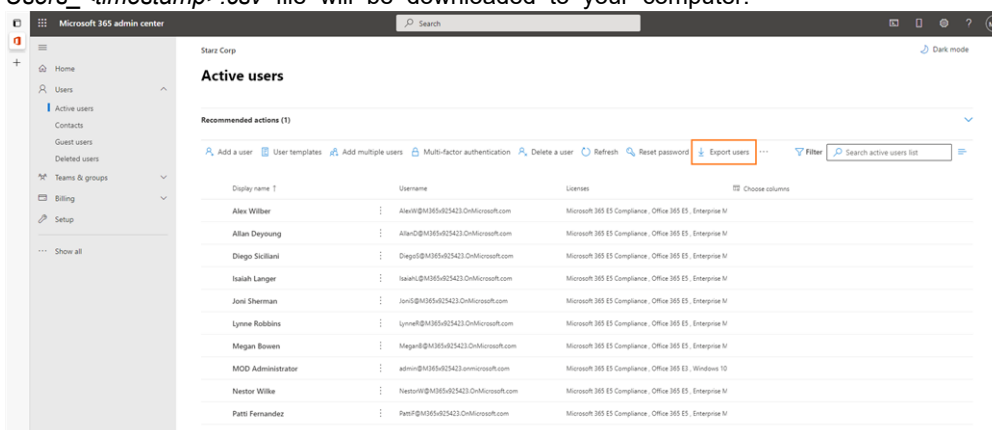
The migration task is created. You can track its progress from the **Tasks tab**, view the summary on the Dashboard or monitor alerts and notifications from the **Events tab**. When the discovery task is complete, a summary about the accounts discovered in the source tenant is available on the project dashboard.

## Discovering accounts from a file

When you have a large set of accounts but you want to discover a subset of those accounts, the CSV file lets you specify the accounts (users and Microsoft 365 groups) that you want to discover and ignore the rest. You can then use this file in the *New Account Discovery Task* wizard.

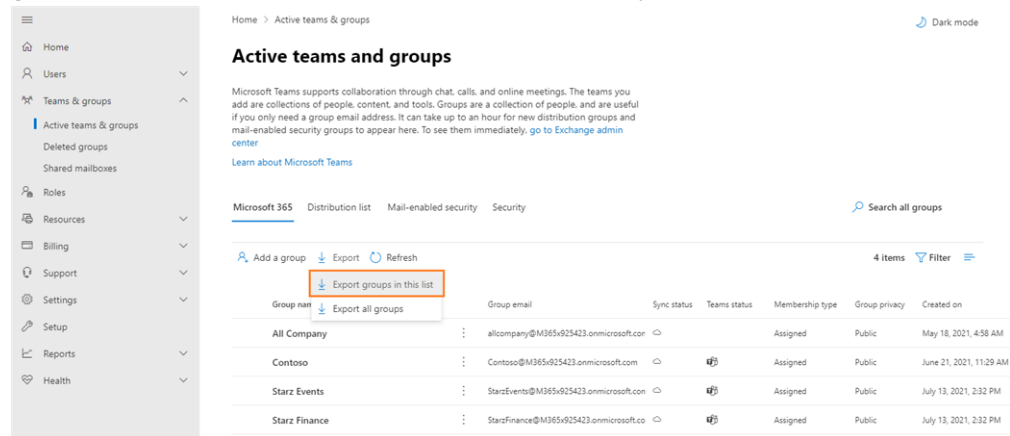
### To prepare the CSV file:

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 teams and groups**.
  - b. Select the **Microsoft 365** tab in the *Active teams and 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 user accounts and groups with accounts you want to discover. You can use any of the two formats shown below:

**NOTE:**

- You can download a CSV template for either of the two formats when you start the *New Account Discovery Task* wizard and click **Download Example File** from the *Discovery Options* step.
- CSV file names with non-ASCII characters are not supported.

**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

**UserPrincipalName** - Column header for the login name for a user account based on the Internet standard RFC 822. Do not use a mail nickname or proxy address.

**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** - Column header for the 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** - Column header for the type of account: **user** or **Microsoft 365 group**.

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

### To run the account 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 **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. From the *Accounts* tile on the project dashboard click **Open**. The *Accounts and User data* migration workspace opens.
5. Open the *Accounts* tab . From the *List View* menu, click **Discovery** and then select **Discover From File**. The *New Account Discovery Task* wizard starts.
6. **Discovery Options**

**New Account Discovery Task**

Discovery Options  
Notification  
Schedule  
Summary

Select a comma-separated values (CSV) file that lists the accounts to be discovered.

Example 1 CSV File [Download Example File](#)

UserPrincipalName,Type
AdeleV@7vtwf8.onmicrosoft.com,user
DiegoS@7vtwf8.onmicrosoft.com,user
GradyA@7vtwf8.onmicrosoft.com,user
HenriettaM@7vtwf8.onmicrosoft.com,user

Example 2 CSV File [Download Example File](#)

ObjectId,Type
82014a3a-64be-4c46-8b58-8c96482dd4f1,user
97a3f33e-b4ec-478b-90b6-8368276513f8,user
71508740-a17f-47ed-92e6-e38e0b85128c,group
8d36f641-59c5-43da-ab66-b8f9e4afa1e2,user

[Browse...](#)

Step 1 of 4

[Back](#) [Next](#) [Finish](#) [Cancel](#)

- a. Click **Browse** to choose the comma-separated values (CSV) file that contains the lists of user accounts and group identifiers.
  - b. Click **Next**.
7. **Notification**
- a. **Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
    - **Only in a case of failure** - Select this option to send the email if the discovery task fails to complete successfully.
  - b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
  - c. Click **Next**.
8. **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** - task runs immediately.
- **Run later** - task must be started manually.
- **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.

b. Click **Next**.

## 9. Summary

a. Verify the task specifications as described below:

- **Name** - name of the task. You can specify a custom name. Default name is **Account Discovery Task**.
- **Source tenant** - name of the source tenant in this project.
- **Discover Type** - discovery option that is selected. Value is set to **Using CSV file**.
- **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. The task will start as scheduled.

The migration task is created. You can track its progress from the **Tasks** tab, view the summary on the Dashboard or monitor alerts and notifications from the **Events** tab. When the discovery task is complete, a summary about the accounts discovered in the source tenant is available on the project dashboard.

## Discovering accounts from a file using security groups

When you need to limit an application's access to a specific set of mailboxes, use this option to include the security groups in a CSV file. You can then use this file in the New Discovery Task as described in this topic to discover the accounts from the source tenant. Application access policies can be assigned to these discovered groups to restrict access to the group members only.

### **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 Security Groups:
  - a. From the navigation pane, click **Teams and groups**.
  - b. Select the **Mail-enabled security** tab in the *Active teams and 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.

Home > Active teams & groups

### Active teams and groups

Microsoft Teams supports collaboration through chat, calls, and online meetings. The teams you add are collections of people, content, and tools. Groups are a collection of people, and are useful if you only need a group email address. It can take up to an hour for new distribution groups and mail-enabled security groups to appear here. To see them immediately, [go to Exchange admin center](#).  
[Learn about Microsoft Teams](#)

Microsoft 365 Distribution list Mail-enabled security Security

Search all teams and gro...

Add a group Export Refresh

Export groups in this list

Name	Email	Sync status	Created on	Choose columns
Network Administrators	netadmin@destinycorp.onmicrosoft.com		October 15, 2021, 2:46 P	
Plant Administrators	plantadmin@destinycorp.onmicrosoft.com		October 15, 2021, 2:46 P	
Security Team	security@destinycorp.onmicrosoft.com		October 15, 2021, 2:46 P	
Data Center Group	datacenter@destinycorp.onmicrosoft.com		October 15, 2021, 2:46 P	

3. Create a new CSV file and add the email ids of the security groups with the member accounts you want to discover.

#### **i** NOTE:

- You can download a CSV template when you select **Discover From Security Groups** and start the *New Account Discovery Task* wizard.
- CSV file names with non-ASCII characters are not supported.

	A
1	MailEnabledSecurityGroupEmailID
2	netadmin@destinycorp.onmicrosoft.com
3	plantadmin@destinycorp.onmicrosoft.com
4	security@destinycorp.onmicrosoft.com
5	datacenter@destinycorp.onmicrosoft.com

**MailEnabledSecurityGroupEmailID** - Column header for email IDs of the security groups.

4. Save the CSV file that you created.

#### **To run the account 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 **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. From the *Accounts* tile on the project dashboard click **Open**. The *Accounts and User data* migration workspace opens.
5. Open the *Accounts* tab. From the *List View* menu, click **Discovery** and then select **Discover From Security Groups**. The *New Account Discovery Task* wizard starts.

## 6. Discovery Options

New Account Discovery Task

Discovery Options

Notification

Schedule

Summary

Provide a CSV file with the list of mail enabled security group(s) to be used to discover the accounts.

Example CSV File [Download Example File](#)

MailEnabledSecurityGroupEmailID
netadmin@destinycorp.onmicrosoft.com
plantadmin@destinycorp.onmicrosoft.com
security@destinycorp.onmicrosoft.com
datacenter@destinycorp.onmicrosoft.com

[Browse...](#)

Step 1 of 4

[Back](#) [Next](#) [Finish](#) [Cancel](#)

- Click **Browse** to choose the comma-separated values (CSV) file that contains the list of email IDs of the security groups.
- Click **Next**.

## 7. Notification

- Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
  - Only in a case of failure** - Select this option to send the email if the discovery task fails to complete successfully.
- Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
- Click **Next**.

## 8. Schedule

- Choose from one of three options to schedule the task. The scheduler will be activated only after you complete the task wizard.
  - Run now** - task runs immediately.
  - Run later** - task must be started manually.
  - Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- Click **Next**.

## 9. Summary

- a. Verify the task specifications as described below:
  - **Name** - name of the task. You can specify a custom name. Default name is **Account Discovery Task**.
  - **Source tenant** - name of the source tenant in this project.
  - **Discover Type** - discovery option that is selected. Value is set to **Using Mail-enabled Security Group(s)**.
  - **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. The task will start as scheduled.

The migration task is created. You can track its progress from the **Tasks** tab, view the summary on the Dashboard or monitor alerts and notifications from the **Events** tab. When the discovery task is complete, a summary about the accounts discovered in the source tenant is available on the project dashboard.

## Refreshing Selected Accounts

For all source and target accounts, the task will refresh the **UPN**, **Primary Email Address** and **Object Type** of selected accounts. The task will not modify the migration state of the accounts.

### To start the refresh 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 **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. From the *Accounts* tile on the project dashboard click **Open**. The *Accounts and User data* migration workspace opens.
5. Open the *Accounts* tab. From the *List View* menu, click **Discovery** and then select **Refresh Selected Accounts**. The *New Refresh Selected Accounts Task* wizard starts.
6. **Notification**
  - a. **Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
    - **Only in a case of failure** - Select this option to send the email if the discovery task fails to complete successfully.
  - b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
  - c. Click **Next**.
7. **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** - task runs immediately.
    - **Run later** - task must be started manually.



- **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- b. Click **Next**.
8. **Summary**
- a. Verify the task specifications as described below:
- **Name** - name of the task. You can specify a custom name. Default name is **Refresh Selected Accounts Task**.
  - **Source tenant** - name of the source tenant in this project.
  - **Discover Type** - discovery option that is selected. Value is set to **Refresh Selected**.
  - **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. The task will start as scheduled.

## Reviewing the Account Discovery Task

1. Open 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 **Discovery Task**.
  - b. **Created** - Date and time when the task was created.
  - c. **Modified** - Date and time when the task was last updated.
  - d. **State** - 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)** - The *number* of accounts that were selected for matching and the number of accounts passing through the various states of the task from New to Completed..
  - h. **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.

## Reviewing the Account Discovery Task Events

1. Open 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** - name of the account object if applicable.
  - 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 [Premigration 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 **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **Accounts** tile, or click **Open** from the Accounts tile to open the *Accounts and User Data* dashboard.
5. Select the **Accounts** tab and select **List View** if not already selected.
6. Select the accounts to export.
7. Click **More > Export**.

The screenshot shows the 'Accounts and User Data' dashboard in Quest On Demand. The 'ACCOUNTS' tab is selected, and the 'List View' is active. A table lists 79 accounts, with 2 selected. The 'More Actions' menu is open, showing options like 'Add to Collection', 'Import Collections', 'Process Resources', 'Export', and 'Delete'. The 'Export' option is highlighted. The table columns include Name, Source Type, Target Type, ODM Licensed, Target UPN, Source Group Type, Target Group Type, Title, Department, and Country.

Sync	Name	Source Type	Target Type	ODM Licensed	Target UPN	Source Group Type	Target Group Type	Title	Depa...	C...
<input type="checkbox"/>	Adele Vance	Mailbox-Enabl...	Mailbox-Enabl...	Yes	Adelev@M365x34...	-	-	Retail Ma...	Retail	U...
<input type="checkbox"/>	Alex Wilber	Mailbox-Enabl...		No	-	-	-	Marketin...	Marke...	U...
<input type="checkbox"/>	All Company	Microsoft 365 ...		Not required	-	Assigned	-	-	-	-
<input type="checkbox"/>	All Employees	Distribution G...		Not required	-	Assigned	-	-	-	-
<input type="checkbox"/>	Allan Deyoung	Mailbox-Enabl...		No	AllanD@M365x49...	-	-	IT Admin	IT	U...
<input type="checkbox"/>	Ask HR	Microsoft 365 ...		Not required	-	Assigned	-	-	-	-
<input type="checkbox"/>	Automate Bot	Non-Mail-Ena...		No	AutomateB@M36...	-	-	-	-	-
<input checked="" type="checkbox"/>	Bianca Pisani	Non-Mail-Ena...		No	BiancaP@M365x4...	-	-	Salespers...	Sales	U...
<input checked="" type="checkbox"/>	Brian Johnson (TA...	Mailbox-Enabl...		No	BrianJ@M365x499...	-	-	-	-	-
<input type="checkbox"/>	Cameron White	Non-Mail-Ena...		No	CameronW@M36...	-	-	Salespers...	Sales	U...
<input type="checkbox"/>	CEO Connection	Microsoft 365 ...		Not required	-	Assigned	-	-	-	-

8. Open the CSV file by extracting it from the ZIP file that is downloaded to your computer.


## 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.

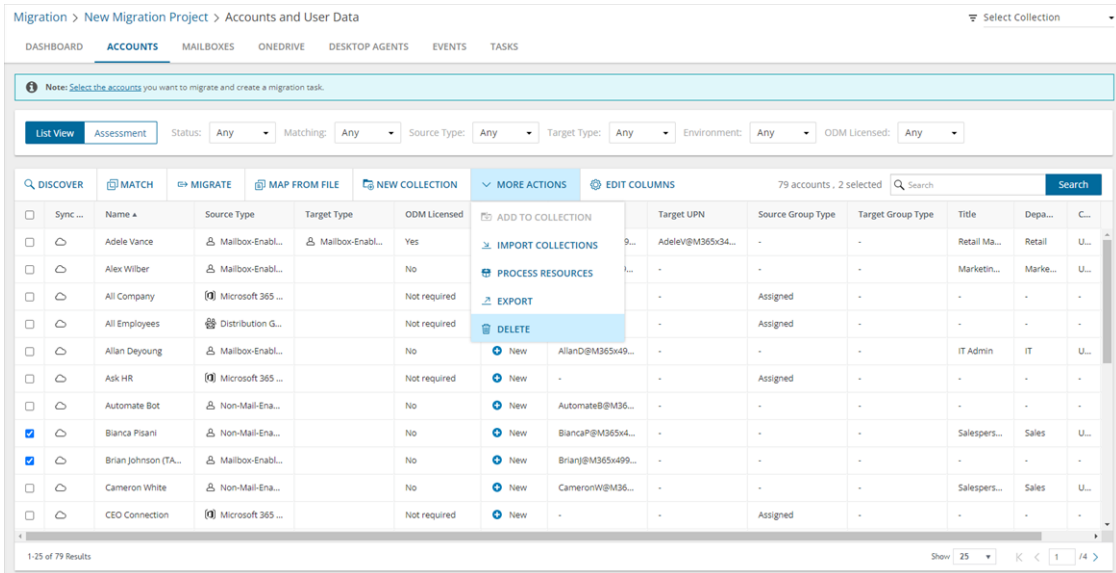
If these accounts are listed in other projects, they will be displayed in those projects.

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.

3. Create a new project or open an existing project.
4. Click the **Accounts** tile, or click **Open** from the Accounts tile to open the *Accounts and User Data* dashboard.
5. Select the **Accounts** tab and select **List View** if not already selected.
6. Select the accounts you want to clear.

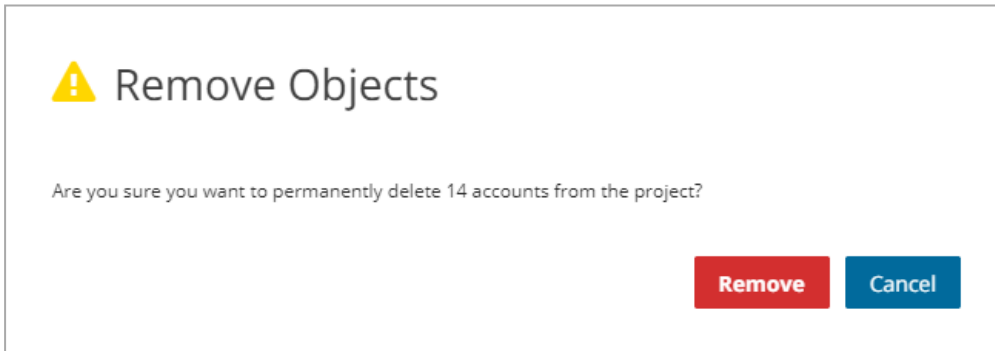
 **TIP:** Use filters, search or collections to quickly navigate through the list of accounts.

7. Click **More > Delete**.



The screenshot shows the 'Accounts and User Data' dashboard. At the top, there's a breadcrumb trail: 'Migration > New Migration Project > Accounts and User Data'. Below this are tabs for 'DASHBOARD', 'ACCOUNTS' (selected), 'MAILBOXES', 'ONEDRIVE', 'DESKTOP AGENTS', 'EVENTS', and 'TASKS'. A note says: 'Note: Select the accounts you want to migrate and create a migration task.' Below the note are filters for 'List View', 'Assessment', 'Status', 'Matching', 'Source Type', 'Target Type', 'Environment', and 'ODM Licensed'. A table lists 79 accounts, with 2 selected. The 'More Actions' menu is open, showing options: 'ADD TO COLLECTION', 'IMPORT COLLECTIONS', 'PROCESS RESOURCES', 'EXPORT', and 'DELETE' (highlighted). The table columns include: Name, Source Type, Target Type, ODM Licensed, Target UPN, Source Group Type, Target Group Type, Title, Depa..., and C... The table shows accounts like Adele Vance, Alex Wilber, All Company, All Employees, Allan Deyoung, Ask HR, Automate Bot, Bianca Pisani, Brian Johnson (TA...), Cameron White, and CEO Connection.

8. The *Remove Objects* confirmation dialog opens.



The screenshot shows a confirmation dialog titled 'Remove Objects' with a yellow warning icon. The text inside says: 'Are you sure you want to permanently delete 14 accounts from the project?'. At the bottom right, there are two buttons: 'Remove' (red) and 'Cancel' (blue).

9. Click **Remove** to remove the selected accounts from the list.

## Managing Accounts with Collections

Migrating large numbers of accounts requires careful planning. The accounts could belong to different offices and geographical locations or sensitive departments. Migrating groups of employees in top management, Finance or Legal departments require special care. Organize the accounts into collections to make large account lists more manageable.



**NOTE:** The actions and steps described below are the same for managing Mailboxes or OneDrive accounts with Collections.

In this topic:

- [Adding Accounts to Collections](#)
- [Working with the Collections Dashboard](#)

## Adding accounts to Collections

You can add accounts to collections in three ways:

- [Select the accounts and create a new collection](#)
- [Select the accounts and add to an existing collection.](#)
- [Use a CSV file to add accounts to one or more collections.](#)

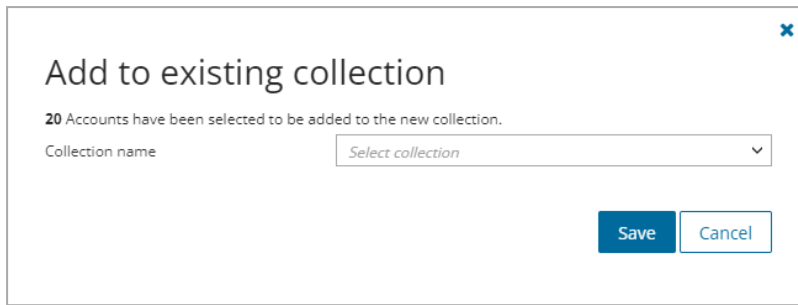
### **To add selected accounts to a new collection:**

1. From the project dashboard, click **Open** in the Accounts tile to open the *Accounts and User Data* migration workspace.
2. Open the **Accounts** tab and select **List View** if not already selected.
3. Select the accounts you want to add to a collection.
4. From the actions toolbar, click **Collections > Create New Collection**. The *New Collection* dialog opens.

5. Enter a collection name in the **Collection name** field and click **Save** to add the selected accounts to the collection.

### **To add selected accounts to an existing collection:**

1. From the project dashboard, click **Open** in the Accounts tile to open the *Accounts and User Data* migration workspace.
2. If you need to create a new collection:
  - a. From the top-right corner of the migration workspace, click **Select Collection > + New Collection**
  - b. Enter a collection name and click **Save** to add this collection to the project.
3. Click the **Accounts** tab and select the accounts that you want to add to the collection.
4. From the actions toolbar, click **Collections > Add to Collection**. The *Add to existing collection* dialog opens.



5. Select your collection from the **Collection name** dropdown and click **Save** to add the selected accounts to the collection.

**To add accounts to one or more collections with a CSV file:**

Using a CSV file provides the following additional benefits:

- Multiple collections can be created with the same CSV file.
- Existing collections can be specified in the CSV file to add additional accounts.
- Accounts can be listed in multiple collections.

This is a two-step process as described below:

**Step 1: Prepare the CSV file**

1. From the actions toolbar, click **Collections > Import Collections**. The *New Import Collections from File Task* wizard starts.
2. From the **Mapping File** step, click **Download Example File** to download the format you want. A ZIP file is downloaded.

Populate the collection with accounts from a comma-separated values (CSV) file.

Example 1 CSV File [Download Example File](#)

```
UserPrincipalName,Collection
AdeleV@7vtwf8.onmicrosoft.com,Finance
DiegoS@7vtwf8.onmicrosoft.com,Sales
GradyA@7vtwf8.onmicrosoft.com,Sales
HenriettaM@7vtwf8.onmicrosoft.com,Finance
```

Example 2 CSV File [Download Example File](#)

```
ObjectId,Collection
82014a3a-64be-4c46-8b58-8c96482dd4f1,Finance
97a3f33e-b4ec-478b-90b6-8368276513f8,Sales
71508740-a17f-47ed-92e6-e38e0b85128c,Sales
8d36f641-59c5-43da-ab66-b8f9e4afa1e2,Finance
```

Example 3 CSV File [Download Example File](#)

```
Email,Collection
AdeleV@7vtwf8.onmicrosoft.com,Finance
DiegoS@7vtwf8.onmicrosoft.com,Sales
GradyA@7vtwf8.onmicrosoft.com,Sales
HenriettaM@7vtwf8.onmicrosoft.com,Finance
```

**Note:** The accounts in the CSV file must already be discovered in the project.

Provide accounts as a list of

[Browse...](#)

3. Extract the CSV file and use it to prepare your import file in one of three formats described below:

**i** **NOTE:** CSV file names with non-ASCII characters are not supported. Accounts in the CSV that have not been discovered cannot be added to a collection.

**Format 1:** Use the **ObjectId** to identify accounts

	A	B
1	ObjectId	Collection
2	e49e00ff-d726-4d08-b14a-d5444b9060fd	Finance
3	3a9c1b97-8242-47d5-a053-856c096a3e63	Finance
4	04d0e5d6-1c82-4c53-9322-f8d4ffd6f5dd	Finance
5	54609662-21bb-459d-b2b1-b5b0acfad49d	Sales
6	fb3cf36a-3d99-460b-87d0-5d61dd68d0b2	Sales

- **ObjectId** - Column header for the globally unique identifier that represents a discovered account.  
The following variations of **ObjectId** are supported: ObjectId, objectid, objectId, OBJECTID
- **Collection** - Column header for the collection name

**Format 2:** Use the **UserPrincipalName** to identify accounts

	A	B
1	UserPrincipalName	Collection
2	NestorW@starz.OnMicrosoft.com	Management
3	PattiF@starz.OnMicrosoft.com	Management
4	DiegoS@starz.OnMicrosoft.com	Management
5	AlexW@starz.OnMicrosoft.com	Marketing
6	MeganB@starz.OnMicrosoft.com	Marketing

- **UserPrincipalName** - Column header for the login name of an account based on the Internet standard RFC 822. Do not use a mail nickname or proxy address. The following variations of **UserPrincipalName** are supported: UserPrincipalName, userprincipalname, USERPRINCIPALNAME
- **Collection** - Column header for the collection name

**Format 3:** Use the **Email** to identify accounts

	A	B
1	Email	Collection
2	AdeleV@7vtwf8.onmicrosoft.com	Finance
3	DiegoS@7vtwf8.onmicrosoft.com	Sales
4	GradyA@7vtwf8.onmicrosoft.com	Sales
5	HenriettaM@7vtwf8.onmicrosoft.com	Finance
6		

- **Email** - Column header for the email of an account user.
- **Collection** - Column header for the collection name

## Step 2: Import the CSV file

1. Open the **Accounts** tab (or the Mailbox or OneDrive tab if you're importing mailboxes or OneDrive accounts respectively).
2. From the actions toolbar, click **Collections > Import Collections**. The *New Import Collections from File Task* wizard starts.
3. **Mapping File**
  - a. Click the **Provide accounts as a list of** drop-down and select either **ObjectIds**, **UserPrincipalNames** or **Emails** depending on the format of the CSV file that you have prepared.
  - b. Click **Browse** and select the CSV file. The selected CSV file name appears.
4. **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** - task runs immediately.
    - **Run later** - task must be started manually.
    - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.

- b. Click **Next**.

## 5. Summary

- a. Verify the task specifications as described below:
  - i. **Name** - name of the task. The default name is **Import Collections From File**. You can specify a custom name.
  - ii. **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.
- c. Click **Finish**.



**NOTE:** Identifiers of accounts that are not discovered are ignored without generating an event.

### *To verify the addition of the account to a collection:*

1. Check the **Collections** column in the Accounts List View that indicates the most recent collection where the account has been added and the number of additional collections that also contain the account.
2. Select an account from the Accounts List View to open the Account Detail pane. Check the **Collections** property that lists all the collections where the account has been added.

## Working with the Collection Dashboard

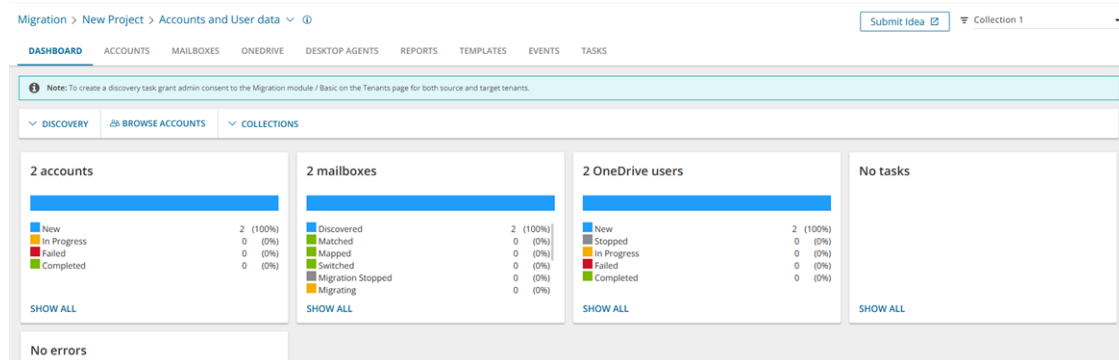
The Collection Dashboard shows the collection-specific summary that includes the accounts, mailboxes and OneDrive users added to it, create tasks for them, and monitor the progress of tasks.

### *To view the collection dashboard for an existing collection:*

- a. Log in to Quest On Demand and choose an organization if you have multiple organizations.
- b. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
- c. Create a new project or open an existing project.
- d. From the project dashboard, click **Open** in the *Accounts* tile to open the *Accounts and User Data* migration workspace
- e. From the top-right corner of the migration workspace, click **Select Collection** and then select the collection to view. The collection *Dashboard* is displayed.
- f. Click **Browse Accounts** from the collection *Dashboard* menu or open the **Accounts** tab. You will see the



list of accounts that belong to the collection.



**To remove items from a collection:**

- From the actions toolbar, click **Collections > Remove from Collection**.
- In the confirmation dialog click **Remove** to remove the selected accounts from the collection.

**To rename the collection:**

- Click **Collections > Rename Collection** in the Actions toolbar of the collections dashboard.

**To delete the collection:**

- Click **Collections > Delete Collection** in the Actions toolbar of the collections dashboard.

**To see the tasks for collection-specific account objects:**

- Open the **Tasks** tab.

**To see the events related to the collection:**

- Open the **Events** tab.

**To return to the Accounts and User Data migration workspace:**

- Click the collection dropdown at the top-right corner of the page, and select **Show All**.

## Matching and Mapping Accounts

Before migrating user or group accounts, check if the target tenant already contains accounts from the source tenant to avoid duplication. You can match accounts from the *Account List View*. Alternatively, you can use a CSV file to manually match or map accounts with the *New Account Mapping from File Task* wizard, including those with different attributes or those not yet present in the target tenant.

You can match source accounts with existing target accounts that have the same attributes directly in the *Account List View*. For accounts with different attributes, use a CSV file to specify the match. When you match accounts, the target account information is displayed in the *Account List View*. During migration, the target account will be updated if it already exists or created if it does not exist.

For mapping source accounts to new target accounts, use a CSV file. When you map accounts, the target account information is displayed in the *Account List View*. During migration, new target accounts will be created based on the mappings.

If needed, you can reset all existing matches and mappings to start over.



**NOTE:** If a source account is not matched or mapped, and a target account exists with the same **Name**, **UserPrincipalName** or **PrimarySmtptAddress**, then the account migration will fail.

#### Example 1: Matching accounts

Jordan Davis is a user in the source tenant. If Jordan Davis exists in the target tenant as well, you can match the accounts by display name directly from the *Accounts List View* by using the *New Account Matching Task* wizard.

Some users in the source may have one set of matching attributes like display name, while others may have another set of matching properties like email, mail nick name, immutable id or employee id. You can run the Account Matching Task multiple times, and each time you can specify a different matching attribute for the selected set of users.

When accounts are successfully matched, the **Account State** column value in the *Accounts List View* will change to **Matched**. When matched accounts are migrated, the target account will be updated with the attribute values of the source, and permissions are merged.

When accounts cannot be matched, the **Account State** column value in the *Accounts List View* will remain as **Discovered**. When unmatched accounts are migrated to the target tenant, then On Demand Migration automatically uses the source account information to create this account in the target tenant.

#### Example 2: Merging accounts

Group A and Group B are two groups in the source tenant that must be merged with Group C that exists in the target tenant. You can match one or more accounts from the source tenant to a single account in the target tenant by using a CSV file in the *New Account Mapping from File Task* wizard. When the task completes successfully, the **Account State** column value in the Account List View will change to **Matched** for both Group A and Group B. Information about group C will also be displayed.

The order in which the two groups from the source are migrated will determine the outcome for the target group in a merger. If Group A is migrated first, then Group C is renamed as Group A in the target. The permissions of Group C are retained, and permissions from Group A that were not in Group C are added (permissions are merged). When Group B is migrated, Group C that was renamed to Group A in the target will be renamed again to Group B, and the permissions are merged once more.

#### Example 3: Creating new accounts

Group X in the source tenant must be mapped to a new Group Z that does not yet exist in the target tenant. You can accomplish this by using a CSV file with the *New Account Mapping from File Task* wizard. After successfully completing the task, the **Account State** column in the *Account List View* will indicate **Mapped** for Group X, and information about Group Z will also be displayed.

When Group X is migrated, a new Group Z will be created in the target tenant based on the attributes specified in the CSV file. All the permissions and details from Group X will be transferred to Group Z. The values provided in the CSV file that are used to create Group Z will remain unchanged even if you update Group X before migration.

Avoid mapping multiple accounts from the source tenant to non-existent accounts in the target tenant, as this will cause the migration to fail.

In this topic:

- [Matching accounts selected from the accounts list](#)
- [Matching or mapping accounts with a CSV file](#)
- [Reviewing the Account Matching Task](#)
- [Reviewing the Account Matching Task Events](#)

## Matching accounts selected from the accounts list

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **Accounts** tile, or click **Open** from the Accounts tile to open the *Accounts and User Data* dashboard.
5. Go to the *Accounts* tab and select **List View** if not already selected.
6. Select the accounts you want to match and then click **Match > Match Selected** from the *List View* menu. The *New Account Matching Task* wizard starts. Each step is described below:

7. **Start**

- a. **Task Name** - You can specify a custom name. The default name is **Account Matching Task**.

8. **Account Matching**

- a. Select and configure the options as described below:

- **Clear existing matches** - all matches are cleared.
- **Match by attribute** - use the specified attribute pairs to match accounts in the source and target tenants. 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** - username of source email address and default target domain is used to construct the email address for matching.
  - **mailNickname** - email alias used in Exchange servers.

- **ImmutableId** - a specific attribute for a Microsoft 365 account object that is synchronized from on premise 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.
- b. Click **Next**.
9. **Notification**
- a. **Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
- **Only in a case of failure** - Select this option to send the email if the discovery task fails to complete successfully.
- b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
10. **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** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- b. Click **Next**.
11. **Summary**
- a. Verify the task specifications as described below:
- **Name** - name of the task. The default name is **Account Matching Task**. You can specify a custom name.
  - **Source tenant** - name of the tenant where the statistics will be collected.
  - **Target tenant** - name of the target tenant in this project.
  - **Assign Licenses** - value is **Yes**.
  - **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.

## Matching or mapping accounts with a CSV file

Use this method to match or map accounts from the source to accounts in the tenant that have different 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 Account Mapping from File Task* wizard to match or map the accounts from the source to the target tenant.

The steps are as follows:

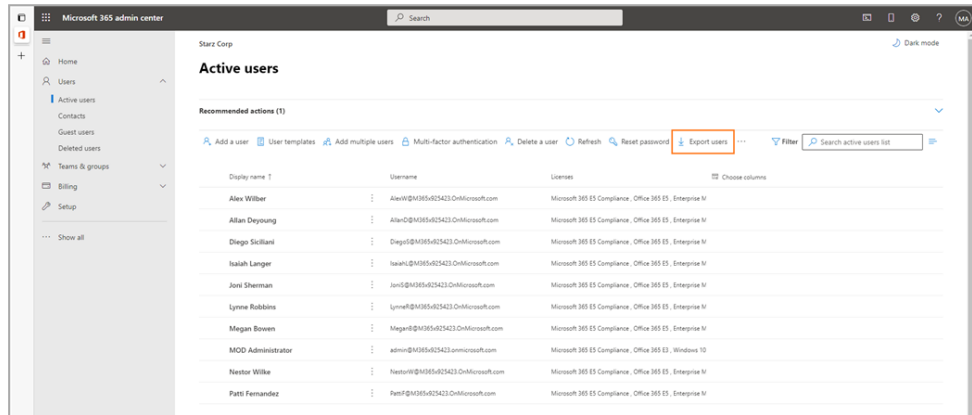
1. [Download the relevant CSV template.](#)
2. [Prepare the CSV file.](#)

### 3. Start the Account Mapping from File Task.

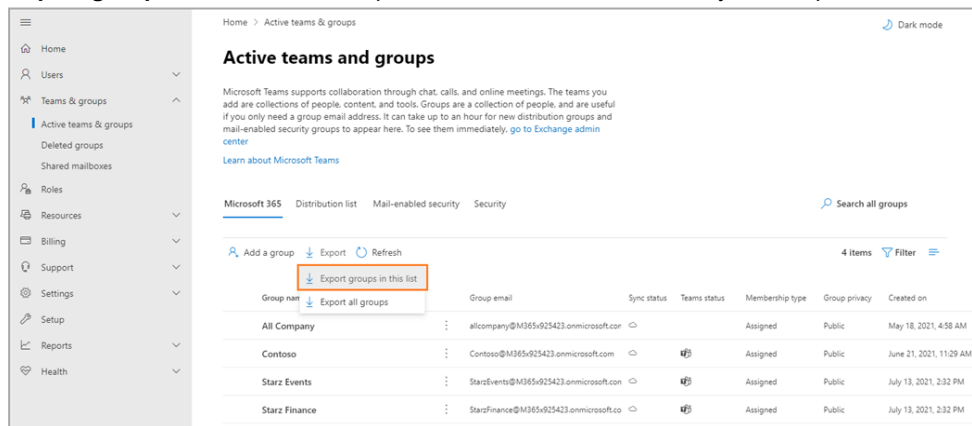


**TIP:** You can get a list of users or groups for your CSV file along with pertinent information directly from the Microsoft 365 Admin Center.

1. Log in to the [Microsoft 365 admin center](#) 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.

## Download the relevant CSV template

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.

3. Create a new project or open an existing project.
4. Click the **Accounts** tile, or click **Open** from the Accounts tile to open the *Accounts and User Data* dashboard.
5. Select the **Accounts** tab and select **List View** if not already selected.
6. From the *List View* menu click **Match > Map From File**. The *New Account Mapping from File Task* wizard starts. Each step is described below:
7. **Start**
  - a. **Task Name** - You can specify a custom name. The default name is **Account Mapping from File Task**.
8. **Mapping File**
  - a. **Match with existing account** - select this option to match the source account with an existing target account.

**New Account Mapping from File Task**

Start  
Mapping File  
Notification  
Schedule  
Summary

☒ Match with existing account ⓘ  
☐ Map to new account (account will be created during migration) ⓘ

Select a comma-separated values (CSV) file with custom mapping of source and target accounts.  
[Download Example File](#)

Example 1 CSV File

SourceUPN,TargetUPN
AdeleV@source.com,AlexW@target.com
DiegoS@source.com,DeliaD@target.com
GradyA@source.com,GerhartM@target.com
HenriettaM@source.com,LynneR@target.com

[Download Example File](#)

Example 2 CSV File

SourceObjectid,TargetObjectid
beca8786-738e-44fe-a304-9f02743c5edd,a5380918-2440-4eac-9eed-e6135e5fa15b
baf608da-1437-4643-ad00-8039c04eb52c,e6af9d1d-c815-4107-96f2-83e17fb938c9
126070f2-5f67-40a3-9ac2-02dc779386f0,1611673a-bfdb-4828-bd69-f720a97a1d9d
2c91a6b1-50b5-4927-95ce-7c9a67b28c4c,c6dbe208-38c4-4007-9788-3c30f06efb69

[Browse...](#)

Step 1 of 4

[Back](#) [Next](#) [Finish](#) [Cancel](#)

- b. **Map to new account** - select this option to prepare a new user or group account with the specified information. The new user or group will be created during migration.

- c. Click **Download Example File**.
- d. Click **Cancel** to exit the wizard.

## Prepare the CSV file

1. Create a CSV file and add the attributes of the users and groups you want to match or map from the source to the target tenant. You can use any of the two formats shown below:



### NOTE:

- User 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.

### CSV formats to match with an existing target user or group account

You can prepare the CSV in one of two formats to match the source account with an existing target account. If a match is not found, the source account is created in the target tenant during migration.

#### Format 1 Using the **SourceUPN** and **TargetUPN**

- **SourceUPN** - Source account name in the format of an email address based on the Internet standard RFC 822. Do not use a mail nickname or proxy address.
- **TargetUPN** - Target account name in the format of an email address based on the Internet standard RFC 822. Do not use a mail nickname or proxy address.

#### Format 2 Using the **SourceObjectId** and **TargetObjectId**

- **SourceObjectId** - Globally unique identifier (GUID) of the source account.
- **TargetObjectId** - Globally unique identifier (GUID) of the target account.

### CSV formats to map to a new target user or group account

You can prepare the CSV in one of two formats as described below. The values specified in the CSV are used to create the new account and these values will persist even if you update the source account. If you don't specify the optional attributes, these values will be copied from the source account. The new user or group account will be created during migration.

**Format 1 For mapping to a new target user account**

- **SourceUPN** - User's login name in the format of an email address in the source tenant.
- **TargetUPN** - User's login name in the format of an email address that will be created in the target tenant.
- **TargetDisplayName** - (optional). This is the name that is shown in various Microsoft services and applications (e.g., John Doe). It typically includes both the first and last names of the user and is used for user identification in the directory and email communications.
- **TargetAlias** - (optional). Alternative email address or identifier for the user. It allows users to receive emails sent to different addresses that point to the same mailbox.
- **TargetPrimaryEmail** - (optional). Main email address associated with the user account. It is used for logging in, receiving emails, and as the main identifier for the user.
- **TargetFirstName** - (optional). Given name of the user (e.g., John). It's part of the user's full name and is used in personal settings and directories.
- **TargetLastName** - (optional). Surname or family name of the user (e.g., Doe). Like the first name, it is part of the user's full name and is used in personal settings and directories.

**Format 2 For mapping to a new target group**

- **SourceGroupName** - Name of the group in the source tenant.
- **TargetGroupName** - Name of the group in the target tenant.
- **TargetAlias** - (optional). Alternative email address or identifier for the group. It allows the group to receive emails sent to different addresses that point to the same mailbox.
- **TargetPrimaryEmail** - (optional). Main email address associated with the group.

2. Save the CSV file that you created.

## Start the Account 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 **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **Accounts** tile, or click **Open** from the Accounts tile to open the *Accounts and User Data* dashboard.
5. Select the **Accounts** tab and select **List View** if not already selected.
6. From the *List View* menu click **Match > Map From File**. The *New Account Mapping from File Task* wizard starts. Each step is described below:
7. **Start**
  - a. **Task Name** - You can specify a custom name. The default name is **Account Mapping from File Task**.
8. **Mapping File**



- a. **Match with existing account** - select this option to match the source account with a target account specified in the CSV file. During migration, if a match is found, the source account is updated, and permissions are merged. If a match is not found, the target account including permissions is created from the source.
- b. **Map to new account** - select this option to create a new user account or group specified in the CSV file. The user account or group will be created in the target tenant during migration with information provided in the CSV file. During migration, the attributes of the new target specified in the CSV will be retained and all other attributes and permissions will be copied from the source account.
- c. Click **Browse** and select the CSV file with the account maps that you prepared.
- d. Click **Next**.

## 9. Notification

- a. **Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
  - **Only in a case of failure** - Select this option to send the email if the discovery task fails to complete successfully.
- b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.

## 10. 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** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- b. Click **Next**.

## 11. Summary

- a. Verify the task specifications as described below:
  - i. **Name** - name of the task. The default name is **Account Mapping from File 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.

## Reviewing the Account Matching Task

1. Open 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 **Matching**.
  - b. **Created** - Date and time when the task was created.
  - c. **Modified** - Date and time when the task was last updated.
  - d. **State** - 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*) - The *number* of accounts that were selected for matching and the number of accounts passing through the various states of the task from New to Completed.
  - h. **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.

## Reviewing the Account Matching Task Events

1. Open 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** - name of the account object if applicable.
  - b. **Task** - name of the task.
  - c. **Time** - date and time when the event occurred.
  - d. **Category** - type of task. For account mapping tasks, the category is **Matching**.
  - e. **Summary** - a descriptive statement about the event.

# Collecting Statistics

A **Collect Account Statistics Task** conducts an assessment of all accounts in the source tenant and matching accounts in the target tenant.

Each **Collect Account Statistics Task** generates events. Events are milestones that a task achieves as it runs. For example, when an **Collect Account 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 **Collect Account 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.



**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 Collect Account Statistics Task](#)
- [Review the Collect Account Statistics Task](#)
- [Review the statistics collected](#)
- [Review the events for the Collect Account Statistics Task](#)

## Create a Collect Account Statistics Task

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **Account** tile, or click **Open** from the Account tile to open the *Accounts and User Data* migration workspace.
5. Select the **Accounts** tab and then select **List View** if not already selected. Then select any account in the list to activate the menu options.
6. From the *Actions* menu, click **More> Collect Statistics**. The *New Collect Account Statistics Task* wizard starts. Each step is described below:
7. **Description**
  - a. **Retrieve external sender permissions for distribution groups** - retrieves the permissions set for external users who are allowed to send email to distribution groups.
  - b. **Collect statistics from target** - select this option to collect statistics from the target tenant and generate the [Comparison Report](#).
  - c. **Retrieve group membership details** - select this option to retrieve group memberships of group type accounts.
  - d. Click **Next**.
8. **Notification**
  - a. **Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
    - **Only in a case of failure** - Select this option to send the email if the discovery task fails to complete successfully.

- b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
  - c. Click **Next**.
9. **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** - task runs immediately.
    - **Run later** - task must be started manually.
    - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
  - b. Click **Next**.
10. **Summary**
- a. Verify the task specifications as described below:
    - i. **Name** - name of the task. You can specify a custom name. The default name is **Collect Account Statistics Task**.
    - 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.

## Review the Collect Account Statistics Task

1. Open the **Tasks** tab.
2. Select the Collect Account 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 `Account Assessment`.
  - b. **Created** - date and time when the task was created.
  - c. **Modified** - date and time when the task was last updated.
  - d. **State** - state of the task.
  - e. **Last Operation** - 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 of accounts processed and their task status.
  - h. **Events (number)** - number of events that the task encountered.

Migration > New Migration Project > Accounts and User Data

DASHBOARD ACCOUNTS MAILBOXES ONEDRIVE DESKTOP AGENTS REPORTS EVENTS **TASKS**

State: Any Type: Any Severity: Any Relevance: Any

2 tasks Search

Title	State	Type	Created	Operation
Collect Account Statistics Task	Completed	Account Assessment	Today at 9:29 PM	Collected 1 account statistics
Account Discovery Task	Completed	Discover	Today at 8:08 PM	Discovered 80 accounts

**Collect Account Statistics Task**

Type: Account Assessment

Created: Sunday, October 29, 2023 9:29 PM

Modified: Sunday, October 29, 2023 9:30 PM

Status: Completed

Last Operation: Collected 1 account statistics

Schedule: Now

Accounts (1)

New	0
In Progress	0
Failed	0
Completed	1

Events (2) 2

Copy Diagnostics

Download Premigration Report

## Review the statistics collected

1. Open the **Tasks** tab.
2. Select the Collect Account Statistics Task that you want to review.
3. From the task details pane, click **Download Premigration Report**. If comparison reports were generated, click **Download comparison report**.
4. Download and save the ZIP file to a suitable folder, and extract the report.

**NOTE:** Premigration reports are also available from the following tasks:

- Discover All
- Discover From File
- Discover From Security Groups
- Refresh Selected Accounts

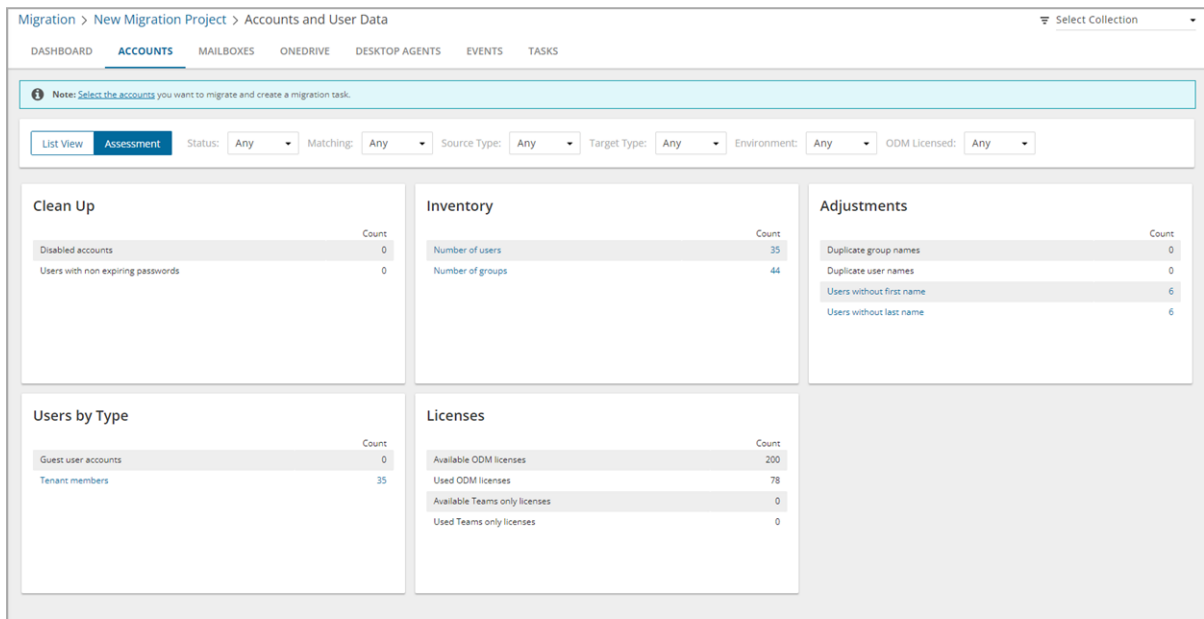
## Review the Collect Account Statistics Task Events

1. Open the **Tasks** tab.
2. Select a task named **Collect Account 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** - name of the account object if applicable.
  - b. **Task** - name of the task.

- c. **Time** - date and time when the event occurred.
- d. **Category** - type of task. the value is **Account Assessment**.

# Assessment

The On Demand Migration account service 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**:

- **Clean Up**
  - Disabled accounts
  - Users with non expiring passwords
- **Adjustments**
  - Duplicate group names
  - Duplicate user names
  - Users without first name
  - Users without last name
- **Inventory**
  - Number of users
  - Number of groups
- **User by Type**
  - External Accounts
  - Tenant members

- **Licenses**
  - Available ODM licenses
  - Used ODM licenses
  - Available Teams only licenses
  - Used Teams only licenses

# Migrating Accounts

**CAUTION:** Don't start a migration before the discovery task is finished. Running a matching task is recommended.

In this topic:

- [Considerations for Guest User Migration](#)
- [Preferred Data Location](#)
- [Starting an Account Migration Task](#)
- [Reviewing the Account Migration Task](#)
- [Reviewing the Account Migration Task Events](#)

## Considerations for Guest User Migration

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

On Demand migration can process all guest user types supported by Microsoft. Before adding a guest user account to the migration task, 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.
- A regular source user mapped to a target guest user during migration, will be converted to a regular user. If the target guest user was created in an on-premise environment, you must manually convert the target guest user to a regular user.

## Preferred Data Location

For multi-geo enabled tenants, each account could be assigned a **Preferred Data Location (PDL)** property in Azure Active Directory. During account migration the property is migrated from source to target tenant. If the preferred data location is set in the source account then the same setting can be migrated to the target. If the preferred data location is absent in the source tenant then it will either not be set on the target or it will use the

default location of the target tenant. This applies only for general tenant to multi-geo tenant and multi-geo tenant to multi-geo tenant migrations.

## Starting an Account Migration Task

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the *Accounts* tile, or click **Open** from the Accounts tile to open the *Accounts and User Data* migration workspace.
5. Click the *Accounts* tab and select **List View** if not already selected.
6. Select the accounts you want to migrate. If you are planning to migrate Microsoft 365 Groups including content, see [Microsoft 365 Groups Migration](#).
7. Click **Migrate** from the *Actions* menu. The *New Account Migration Task* wizard starts. Each step is described below:
8. **Custom Target Domain**

The screenshot shows the 'New Account Migration Task' wizard, Step 1 of 5: Custom Target Domain. The left sidebar contains a list of steps: Custom Target Domain (selected), Custom Source Dom..., Guest Users, Notification, Schedule, and Summary. The main content area has a title 'New Account Migration Task' and a close button. Below the title, there is a description: 'Custom Azure AD domain name allows you to assign corporate names to the migrated users, such as user@sitiraka.com instead of user@sitiraka.onmicrosoft.com.' An important note states: 'Important: Selected option does not affect Office 365 group migration. Email address for Office 365 group will be created in the default target domain.' A dropdown menu for 'Custom target domain name' is set to 'M365x734928.onmicrosoft.com'. A tip says: 'Tip: To update the information on available target domain names, re-run the discovery task.' Below this, a note explains: 'Choose how the Preferred Data Location (PDL) will be assigned to target accounts created in multi-geo tenants. This applies only for general tenant to multi-geo tenant and multi-geo tenant to multi-geo tenant migrations.' There are two radio button options: 'Set target PDL' (checked) and 'Migrate PDL value from source account'. Below these is an option 'Select PDL value to assign'. At the bottom, it says 'Step 1 of 5' and has buttons for 'Back', 'Next', 'Finish', and 'Cancel'.

a. Configure the options as described below:

- **Custom target domain name** - select the domain you want to use for the UPN and primary SMTP address of accounts created during the migration process.



**NOTE:** Accounts that already exist in the target tenant will not have their current UPN or primary SMTP email address modified.

- **Set target PDL** - choose how the Preferred Data Location (PDL) will be assigned to target accounts created in multi-geo tenants. This applies only for general tenant to multi-geo tenant and multi-geo tenant to multi-geo tenant migrations. The Microsoft 365 multi-geo feature must be available and enabled in the target tenant, otherwise this option is ignored.



- **Migrate PDL value from source account** - assign the same PDL value as the corresponding source account, or use the default location specified in the target tenant.
- **Select PDL value to assign** - assign a specific PDL value to target accounts. Choose a PDL from the **Location** dropdown. See [Microsoft 365 Multi-Geo availability](#) for location codes.

b. Click **Next**.

#### 9. Custom Source Domain

a. Configure the setting as described below:

- **Custom source domain for routing** - select the custom source domain name for forwarding mail from the target account. If the domain is omitted, the primary SMTP address of the source tenant will be used as the forwarding address for the mail enabled user created by this task. Optionally, you can select the custom SMTP domain here that will be used as the forwarding address.

b. Click **Next**.

#### 10. Guest Users

This option is used when guest users are migrated. For all other account types, this option is ignored.

**Send invitation email** - select this option to send an invitation email to migrated guest users. Guest users can either accept the invitation or authenticate with Microsoft to access secured applications. If this option is not selected, guest users must authenticate with Microsoft to access secured applications.

#### 11. Notification

a. **Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.

- **Only in a case of failure** - select this option to send the email if the discovery task fails to complete successfully.

b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.

#### 12. 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** - task runs immediately.
- **Run later** - task must be started manually.
- **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.

b. Click **Next**.

#### 13. Summary

a. Verify the task specifications as described below:

- Name** - name of the task. You can specify a custom name. Default name is **Account Migration Task**.
- Source tenant** - name of the source tenant in this project.
- Target tenant** - name of the target tenant in this project.

- iv. **Custom target domain name** - domain name of your target tenant.
  - v. **Custom domain for forwarding** - custom source domain or primary SMTP address of the source tenant used as the forwarding address for the mail enabled user created by this task.
  - vi. **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.



**IMPORTANT:** The account migration service 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 Microsoft 365 tools or third-party Single Sign On tools.

## Reviewing the Account Migration Task

1. Open 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 **Migration**.
  - b. **Created** - Date and time when the task was created.
  - c. **Modified** - Date and time when the task was last updated.
  - d. **State** - 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*) - The *number* of accounts that were selected for matching and the number of accounts passing through the various states from Migrating to Migrated.
  - h. **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.

## Reviewing the Account Migration Task Events

1. Open 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 event details pane that opens, the information presented is as described below:
  - a. **Object** - name of the account object if applicable.
  - b. **Task** - name of the task.
  - c. **Time** - date and time when the event occurred.

- d. **Category** - type of task. For account migration tasks, the category is **Migrate**.
- e. **Summary** - a descriptive statement about the event.

# Migrating Group Membership

You can migrate group members with the **Group Membership Migration Task** for Distribution Groups, Security Groups, and Mail-Enabled Security Groups. Teams and M365 groups are not supported by Group Membership Migration Task.

- Membership is migrated for all group members that have been matched.
- Unmatched members will be skipped.
- Matched accounts in the target tenant are appended to the target group.
- Existing group members in the target tenant are not removed.

## Starting the Group Membership Migration Task

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **Accounts** tile, or click **Open** from the Accounts tile to open the *Accounts and User Data* migration workspace.
5. Select the **Accounts** tab and select **List View** if not already selected.
6. Select Distribution Groups, Security Groups, and Mail-Enabled Security Groups from the list.
7. From the actions toolbar, click **More > Migrate Group Membership**. The *New Migrate Group Membership Task* wizard starts. Each step is described below:
8. **Description**
  - a. Read the description to understand the implications of group membership migration.
  - b. Click **Next**.
9. **Notification**
  - a. **Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
    - **Only in a case of failure** - select this option to send the email if the discovery task fails to complete successfully.
  - b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
10. **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** - task runs immediately.
    - **Run later** - task must be started manually.

- **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.

b. Click **Next**.

## 11. Summary

- Verify the task specifications as described below:
  - Name** - name of the task. You can specify a custom name. Default name is **Group Membership Migration Task**.
  - Source tenant** - name of the source tenant in this project.
  - Target tenant** - name of the target tenant in this project.
  - Scheduled start** - date and time when the task will start. **Now** indicates that the task will start immediately.
- Click **Back** to revise or review a previous step or click **Finish** to complete the task wizard and start the task as scheduled.

## Reviewing the Group Membership Migration Task

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 state from the **Account State** column in the Accounts list view. The column values during and after a task is run are as follows:

Column value	Description
Migrating	<p>Migration of this object has started.</p> <ul style="list-style-type: none"> <li>• For each source member object (user or group), the matched target account is added to the matched target group</li> <li>• If the matched target account is already a member in the group, the member will not be processed.</li> </ul>
Migrated	<p>Migration is complete and successful. Matches were found for all source group members and the target members were added to the target group.</p>
Migrated with Issues	<p>Migration has completed with errors. At least one member was migrated, but not all. Possible reasons:</p> <ul style="list-style-type: none"> <li>• Source member did not match a target account. Run the <b>Account Matching Task</b> or <b>Account Mapping Task</b> for this member, or ignore if the member is not in scope.</li> <li>• Source member was matched to a target account, but an error occurred when trying to add the member to the target group. The member that failed is listed in the task event. Review error details.</li> </ul>
Migration failed	<p>Migration of members did not succeed. Possible reasons:</p> <ul style="list-style-type: none"> <li>• Source group did not match a target group. Run the <b>Account Matching Task</b> or <b>Account Mapping Task</b>, or perform a standard Account migration.</li> </ul>

Column value	Description
	<ul style="list-style-type: none"> <li>Selected object was a User, Team, or M365 Group. Group Membership migration is not supported for these objects.</li> <li>An error occurred that prevented migrating any members to the matched target group. Review error details.</li> </ul>
Migration stopped	Migration canceled by the user.

## Domain Coexistence

Mergers and acquisitions are often accompanied by the unification of brands and corporate identities, including the consolidation of email addresses. However, the transition from source to target tenant might take considerable time. On Demand Migration offers domain coexistence services to close this gap, 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 the account migration dashboard:

- [Address Rewrite Service](#) seamlessly changes the source users' email flow as if they're already fully migrated to the target tenant. Outgoing email addresses are replaced with the recipient's email address in the target tenant, while all incoming mail is automatically redirected to the source mailbox. Address rewriting can be started once the account is matched or migrated, giving you time to prepare and migrate mailboxes. The Address Rewrite Service requires additional licensing.
- [Calendar Sharing](#) allows users from the source and target tenants to see each other's free or busy information.

## Address Rewrite Service

The 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 the selected address rewriting scenario. Emails are automatically redirected to the source or target mailbox. You can specify the users processed by the service. For example, you can turn on the service for only Sales and Marketing team members.



**IMPORTANT:** Address Rewrite Service requires additional licensing. The service only works with accounts that have been matched in the target tenant. See [matching accounts](#) for more information. Mailbox provisioning is not required.

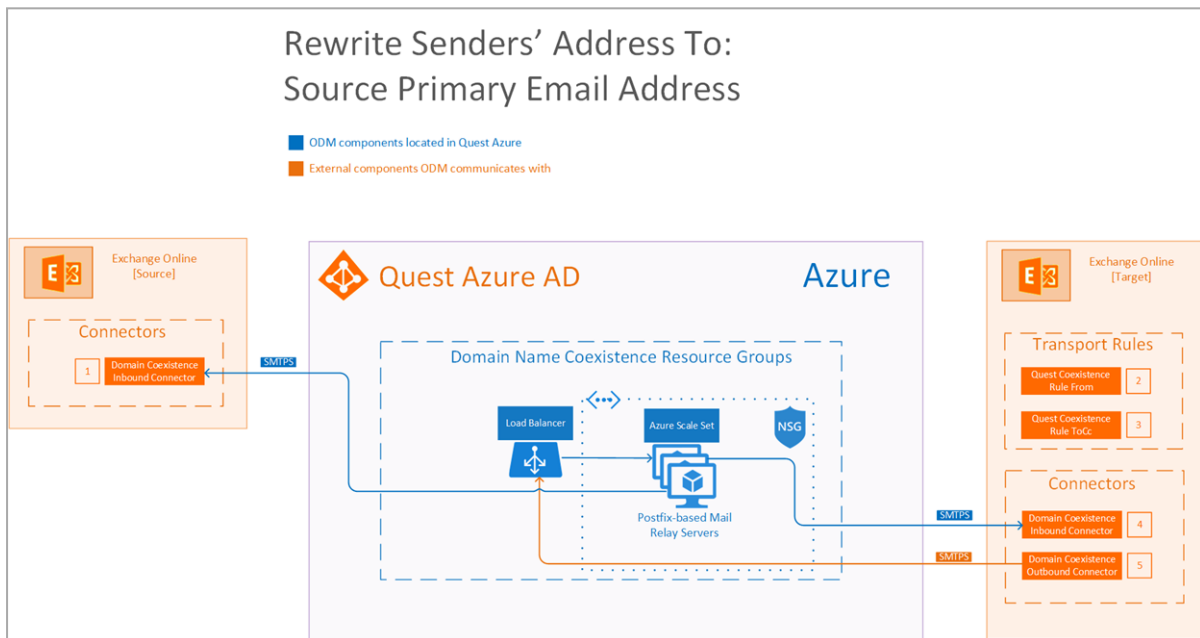
### Address Rewrite Service Message Flow

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 like they were sent from the unified mail domain according to the selected settings. The Address Rewrite Service will take all the necessary steps to create this coexistence space in the Exchange online environment, including creating and managing all the required connectors, mail flow rules, mail-enabled users, and groups in source and target environments. The administrator should add or remove source mail users to this coexistence space and activate or deactivate the Address Rewrite Service.

The mail message flow in a unified domain with an activated Address Rewrite Service is as described below:

#### Unified mail domain in the source tenant

1. When a user sends an email as *user@target.domain* mail user, it is redirected to the Address Rewrite Service server if it is addressed to external recipients.
2. When the Address Rewrite Service receives an email from *user@target.domain*, it checks user eligibility to for the address rewriting service and then processes the email by rewriting *@target.domain* to *@source.domain* for every user address that is found in the coexistence space. The addresses in "From", "To" and "Cc" fields of the email message are rewritten for all external recipients. Then Address Rewrite Service passes the processed email message to the source Exchange Online. Internal recipients that reside in the source receive this email message with unchanged addresses.
3. Exchange Online at the source sends a message to external recipients as if it was sent by a user from *@source.domain*, and all addresses of users added to coexistence scope in **From**, **To** and **Cc** are rewritten for external recipients.
4. The External recipient is not aware about *@target.domain* and replies (or create a new email) to the *user@source.domain*
5. When the reply or a new mail arrives to the source mail domain it will be forwarded to the target. Target recipient gets the message as if it was forwarded from the Exchange online at the source from *user@source.domain*



- 1 **If the message...**  
Is sent outside the organization from a member of the coexistence group  
**Do the following...**  
Route the message using the connector *Quest Coexistence Connector Outbound*.  
**Except if...**  
Sender IP address belongs to one of Mail Relay IP addresses.
- 2 **If the message...**  
Is sent outside the organization and is received by a member of the coexistence group specified in the To or CC field

**Do the following...**

Route the message using the connector *Quest Coexistence Connector Outbound*.

**Except if...**

Sender IP address belongs to one of Mail Relay IP addresses.

**3****Mail flow scenario**

**From:** Mail Relay Servers

**To:** Microsoft 365

**How to identify email sent from Mail Relay Servers**

Identify incoming messages from Mail Relay Servers by verifying that the sending server's IP address is within Mail Relay IP address ranges and the sender's email address is an accepted domain in your organization.

**4****Mail flow scenario**

**From:** Microsoft 365

**To:** Mail Relay Servers

**When to use the connector**

Use only when there is a transport rule (Quest Coexistence Rule From and Quest Coexistence Rule ToCc) is set up that redirects messages to this connector. Routing method Route email messages through Mail Relay Servers.

**5****Mail flow scenario**

**From:** Mail Relay Servers

**To:** Microsoft 365

**How to identify email sent from Mail Relay Servers**

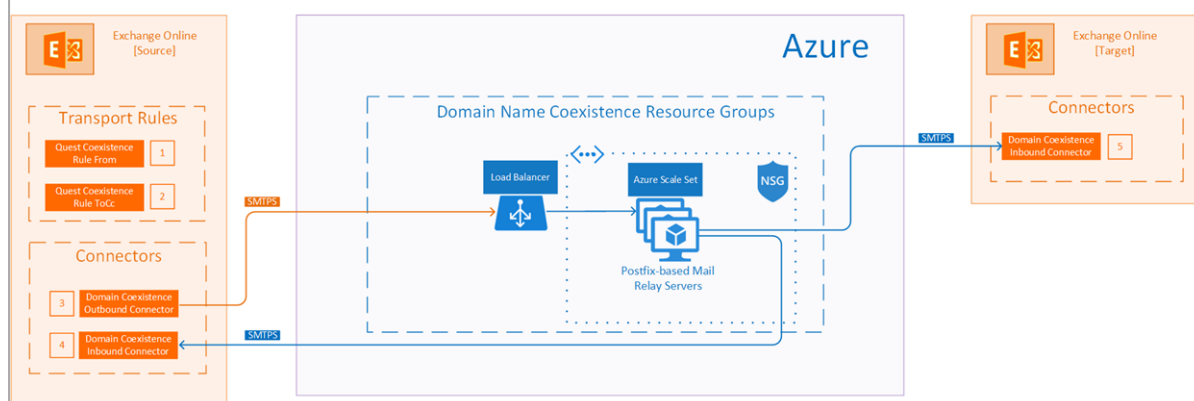
Identify incoming messages from Mail Relay Servers by verifying that the sending server's IP address is within Mail Relay IP address ranges and the sender's email address is an accepted domain in your organization.

**Unified mail domain in the target tenant**

1. When a user sends an email as *user@source.domain* it is redirected to Address Rewrite Service server if it is addressed to external recipients.
2. When the Address Rewrite Service receives email from *user@source.domain*, it checks user eligibility for the address rewriting service and then processes it by rewriting *@source.domain* to *@target.domain* for every user found in the coexistence space. The addresses in "From", "To" and "Cc" of the email message are rewritten for all external recipients. Then Address Rewrite Service passes the processed email message to the target Exchange Online. Internal recipients that reside in the source receive this email message with unchanged addresses.
3. Exchange Online at the target sends the message to external recipients as if it was sent by *user@target.domain*, and all addresses of the users added to the coexistence scope in "From", "To" and "Cc" are rewritten for external recipients.
4. External recipient is not aware about *@sourcedomain* and replies (or create a new email) to *user@target.domain*.
5. When the reply or a new mail arrives to the target mail domain it will be forwarded to the source. Source recipient gets the message as if it was forwarded from the target Exchange online from *user@target.domain*

## Rewrite Senders' Address To: Target Primary Email Address

■ ODM components located in Quest Azure  
■ External components ODM communicates with



1

### If the message...

Is sent outside the organization from a member of the coexistence group

#### Do the following...

Route the message using the connector *Quest Coexistence Connector Outbound*.

#### Except if...

Sender IP address belongs to one of Mail Relay IP addresses.

2

### If the message...

Is sent outside the organization and is received by a member of the coexistence group specified in the To or CC field

#### Do the following...

Route the message using the connector *Quest Coexistence Connector Outbound*.

#### Except if...

Sender IP address belongs to one of Mail Relay IP addresses.

3

### Mail flow scenario

**From:** Microsoft 365

**To:** Mail Relay Servers

#### When to use the connector

Use only when there is a transport rule (Quest Coexistence Rule From and Quest Coexistence Rule ToCc) is set up that redirects messages to this connector. Routing method Route email messages through Mail Relay Servers.

4

### Mail flow scenario

**From:** Mail Relay Servers

**To:** Microsoft 365

#### How to identify email sent from Mail Relay Servers



Identify incoming messages from Mail Relay Servers by verifying that the sending server's IP address is within Mail Relay IP address ranges and the sender's email address is an accepted domain in your organization.

5

#### Mail flow scenario

**From:** Mail Relay Servers

**To:** Microsoft 365

#### How to identify email sent from Mail Relay Servers

Identify incoming messages from Mail Relay Servers by verifying that the sending server's IP address is within Mail Relay IP address ranges and the sender's email address is an accepted domain in your organization.



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

Using the Address Rewrite Service requires following steps:

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

## Address Rewrite Service Considerations

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



**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.

The following groups, connectors and rules appear in Exchange Admin Centers after Exchange Server Integration is configured depending on which rewrite direction is chosen:

### Rewrite Senders' Address to Target

**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 Microsoft 365 to the organization
- Outbound **Quest Coexistence Connector** helps control mail flow for Address Rewrite Service from the organization to Microsoft 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 Microsoft 365

## Rewrite Senders' Address to Source

### On source tenant:

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

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



#### NOTE:

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.

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. Microsoft
- M365 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.

**i** | **IMPORTANT:** We recommend that all incoming mail is automatically redirected to the source mailbox. Set **Mail Flow** for the mailbox to **To source**.

## 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.

**i** | **IMPORTANT:** We recommend that all incoming mail is automatically redirected to the target mailbox. Set **Mail Flow** for the mailbox to **To target**.

## Provisioning the Address Rewrite Service

**i** | **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. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **Accounts** tile, or click **Open** from the Accounts tile to open the *Accounts and User Data* dashboard.
5. Click the **Mailboxes** tab or click **Select** in the **Domain Coexistence** tile.
6. Click **Off** in **Address Rewrite** facet to show the mailboxes that are ready for address rewriting.

**i** | **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.

7. Select the mailboxes and click **Address Rewrite**.
8. In **Address Rewrite Management** task, select **Turn on address rewriting for selected mailboxes**.

9. Click **Next** to view the task summary. Check selected options, name the task, and click **Finish** to start the task.
10. 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.

## Activating Address Rewriting

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

## Deactivating Address Rewriting for Individual Mailboxes

1. Go to the migration project **Dashboard**
2. Click **Accounts**.
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**.

## Deactivating Address Rewriting

1. Go to the migration project **Dashboard**.
2. Click **Accounts**.
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:** Deactivate the Address Rewrite Service if you want to delete the migration project.

## 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 **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **Accounts** tile, or click **Open** from the Accounts tile to open the *Accounts and User Data* dashboard.
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.

# Mailbox Migration

Basic mailbox migration workflow consists of the following steps:

#	Step
1	<a href="#">Collect Statistics</a>
2	Migrate Mailboxes
3	Optional: Use <a href="#">Desktop Update Agent</a> (DUA) to automatically reconfigure user Microsoft Outlook Profiles to connect to the Exchange Online server in the target tenant.

## What We Migrate

Migration limitations indicated below may not be an exhaustive list of limitations as some may appear in unique customer migration scenarios, or arise due to platform or legacy support restrictions. In some cases, a solution to a limitation may already be on the product roadmap.

Quest On Demand migrates the following Mailbox components:

Mailbox Type	Support	Comments
User mailbox	✓	
Shared mailbox	✓	
Distribution Group	✓	
Microsoft 365 Groups	✓	
Resource mailbox	✓	e.g. conference rooms, equipment

Component	Support	Comments
Inbox	✓	
Folders	✓	
Email	✓	Migration of messages inside the mailbox root folder (TIS / Top of Information Store) is not supported.
Calendars	✓	
Tasks	✓	

Component	Support	Comments
Journals	✓	
Notes	✓	
Rules	✓	
Folder Permissions	✓	
Public folders	✓	
Calendar acceptance status emails	✓	
Resource calendar permissions (e.g., for conference rooms)	✓	
Personal distribution lists	✓	
Personal contacts	✓	
Bounce notifications such as non-delivery reports or receipts (NDR)	✓	
Delivery Status Notifications (DSN)	✓	
Custom rules like color categorization of emails, specific logic, sub-calendars and flags	✓	
Calendar notifications such as invites, responses, cancellations, etc.	✓	
PST Connection to Outlook Profile	✓	
Calendar permissions sharing to more than 2 users	✓	
Pictures that have been added within a Business Card	✓	
Deleted items including recoverable deleted items.	✓	
Mailbox permission settings, sharing settings, delegates, and other mailbox-related settings	✓	
PST personal archives	✗	Quest Offers a solution for PST to M365 migration
Safe Sender or Blocked Lists	✓	
RSS Feeds	✗	
Client settings (e.g., default fonts), folder views, outlook customizations	✗	
User defined or custom fields	✗	
Notifications scheduled more than one week in the future	✗	Default notifications that are set to 15 or 30 minutes will be migrated.
Outlook Quick Steps	✗	

# Mailboxes List View

The List View displays the summary of the Mailboxes from the source and target tenants. Initially, the List View displays the list of accounts with mailboxes and other columns are blank. As you run the discovery, collect statistics and migration tasks, the list view will display more information about the accounts and the state of the mailbox migrations.

To open the List View, open the *Accounts and User Data* migration workspace. Then select the **Mailboxes** tab and then select **List View** if not already selected.

The Mailboxes List View is comprised of the following components:

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

**Filter panel** - consists of predefined filters to help you search for mailboxes. See [Filtering](#) for more information about working with filters. The predefined filters are:

- **Mailbox State** - returns a list of mailboxes based on the based on the selected mailbox stage. See the **Mailbox State** column description below for filter values.
- **Archive Mailbox State** - returns a list of mailboxes based on the various stages in the migration process for mailboxes with archiving enabled.
- **Mailbox Type** - returns a list of mailboxes based on the type of mailbox. See the **Type** column described below for filter values.
- **Mailbox View** - returns a list of mailboxes with or without archives. The filter values are:
  - Mailboxes with archive - mailboxes that have an archive enabled
  - Mailboxes without archive - mailboxes that don't have archive enabled.
- **Address Rewrite** - returns a list of mailboxes based on the availability of the Address Rewrite feature. See the **Address Rewrite** column description below for filter values.
- **Mailbox Size** - returns a list of mailboxes based on the size of the mailbox. See the **Size** column description below for filter values.
- **Mail Flow** - returns a list of mailboxes based on the mail forwarding direction of the mailbox. See the **Mail Flow** column description below for filter values.

**List View** - displays information about Mailboxes in the source and target tenants. Use the **Edit Columns** to show or hide columns in the list. The columns are as described below:

- **Type** - icon that indicates the type of mailbox. The following mailbox types are supported:
  1. **User** - mailbox associated with an individual user or account. It stores and manages email messages, contacts, calendar events, and other personal information for a specific user.
  2. **Resource** - mailbox designed for non-human entities or shared resources rather than individual users. It is used to manage and organize emails, events, or other information related to a specific resource such as a meeting room, equipment, or shared space.
    - a. **Room** - mailbox is specifically used to manage and coordinate reservations and scheduling for physical meeting rooms or spaces. Users can book or schedule the room through the room mailbox, helping to avoid conflicts and ensure efficient use of meeting spaces.
    - b. **Equipment** - similar to a room mailbox but is used to manage resources other than meeting rooms, such as projectors, audio-visual equipment, or any shared equipment. It helps in scheduling and coordinating the use of equipment among different users.



- c. **Scheduled** - mailbox associated with a specific schedule or timeline. It might be used to manage and organize emails or events based on predefined schedules or timeframes.
  - d. **Shared** - a mailbox that multiple users can access and use collaboratively. It is often used for teams or groups to manage communications, such as a shared email address for customer support or a shared calendar for a project team.
- **Name** - name of the account in the source tenant.
- **Mailbox State** - indicates various mailbox stages in the migration process of a primary mailbox.
  - **Discovered** - mailbox-enabled account has been found in the source tenant.
  - **Provisioning** - mailbox is being set up in the target tenant.
  - **Provisioning Failed** - mailbox could not be set up in the target tenant.
  - **Matched** - mailbox in source matched to mailbox in target tenant.
  - **Mapped** - mailbox in source mapped to mailbox in target tenant.
  - **Queued** - mailbox migration task is waiting for migration service resources to be available. For more information, see [How Queuing Works](#).
  - **Migrating** - source and target tenants analyzed and mailbox migration started.
  - **Migrated** - mailbox migrated successfully to the target tenant.
  - **Migrated with Issues** - some content is migrated but errors or warnings were encountered during migration. Use a reporting task to look for missing files or other errors.
  - **Migration Failed** - critical error occurred during migration and nothing has been migrated. See task event details for more information.
  - **Switched** - mailbox is switched between source and target.
  - **Migration Stopped** - mailbox migration task has been stopped by the user.
- **Task Status** - status of the most recent task that was run for this mailbox. Valid values are *New, Stopped, In Progress, Failed* and *Completed*.
- **Source Mailbox** - account mailbox in the source tenant.
- **Target Mailbox** - account mailbox in the target tenant.
- **Source UPN** - User Principal Name (UPN) of the source account.
- **Target UPN** - User Principal Name (UPN) of the target account.
- **Mail Flow** - indicates the mail forwarding direction. Valid values are *To source, To target* or *Not Set*.
- **Address Rewrite** - indicates whether another domain is being used for this mailbox. Valid values are:
  1. *On* - domain is setup and is active.
  2. *Off* - domain is setup and is inactive.
  3. *Not supported* - domain is not setup.
- **All Items** - number of all the items in a mailbox. Includes email messages, contacts, calendar events, and other personal information
- **Size** - size of the mailbox in MB
- **Items to Migrate** - the number of items considered for migration in the primary mailbox after the estimation phase
- **Processed** - the number of items in the primary mailbox which were attempted to migrate.

- **Errors** - count of errors during migration.
- **Archive Mailbox Status** - indicates various mailbox stages in the migration process of an archive enabled mailbox.
- **Archive Items to Migrate** - the number of items considered for migration in the archive enabled mailbox after the estimation phase
- **Archive Processed** - the number of items in the archive enabled mailbox which were attempted to migrate.
- **Collections** - indicates the most recent collection where the corresponding account is added and the number of additional collections that also contain this object.

## Mailbox Details

When you select an mailbox-enabled account from the List View, the Mailbox Detail pane opens. The information in the pane is described below:

- **Source UPN** - User Principal Name (UPN) of the source account.
- **Target UPN** - User Principal Name (UPN) of the target account.
- **Status** - status of the most recent task that was run for this mailbox. Valid values are *New*, *Stopped*, *In Progress*, *Failed* and *Completed*.
- **Last Synced** - date and time the mailbox was last synchronized.
- **Events** - count of the events that occurred during mailbox processing through one or more tasks.
- **Collections** - list of collections that contain the selected mailbox-enabled account.
- **Tasks** - list of tasks invoked for the selected mailbox-enabled account.

# Managing Mailboxes with Collections

See the topic [Managing Accounts with Collections](#). The actions and steps described in the topic are the same for managing OneDrive accounts with collections.

## Collecting Statistics

A **Collect Mailbox Statistics Task** conducts an assessment of mailboxes of all accounts in the source tenant and matching accounts in the target tenant.

Each **Collect Mailbox Statistics Task** generates events. Events are milestones that a task achieves as it runs. For example, when a **Collect Mailbox 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 **Collect Mailbox 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.



**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 Collect Mailbox Statistics Task](#)
- [Review the Collect Mailbox Statistics Task](#)
- [Review the events for the Collect Mailbox Statistics Task](#)
- [Review the statistics collected](#)

## Create a Collect Mailbox Statistics Task

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **Mail** tile, or click **Open** from the Mail tile to open the *Accounts and User Data* dashboard.
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 Mailbox Statistics Task* wizard starts. Each step is described below:
  8. **Description**
    - a. **Refresh mailbox statistics that have been already been collected**- select this checkbox if needed to refresh statistics collected from previous tasks.
    - b. **Collect statistics from target** - select this option to collect statistics from the target tenant and generate the [Comparison Report](#).
    - c. Click **Next**.
  9. **Notification**
    - a. **Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
      - **Only in a case of failure** - Select this option to send the email if the discovery task fails to complete successfully.
    - b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
    - c. Click **Next**.
  10. **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** - task runs immediately.
      - **Run later** - task must be started manually.
      - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
    - b. Click **Next**.

## 11. Summary

- a. Verify the task specifications as described below:
  - i. **Name** - name of the task. You can specify a custom name. The default name is **Collect Mailbox Statistics Task**.
  - 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.

## Review the Collect Mailbox Statistics Task

1. Open the **Tasks** tab.
2. Select the Collect Mailbox 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. **State** - 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.

Migration > New Migration Project > Accounts and User Data

DASHBOARD ACCOUNTS MAILBOXES ONEDRIVE DESKTOP AGENTS REPORTS EVENTS **TASKS**

4 tasks Search

Title	State	Type	Created	Operation
Collect Mailbox Statistics Task	Completed	Mailbox Assessment	Today at 10:04 PM	Collected 0 mailbox statistics from source ...
Collect Mailbox Statistics Task	Completed	Mailbox Assessment	Today at 9:56 PM	Collected 27 mailbox statistics from source...
Collect Account Statistics Task	Completed	Account Assessment	Today at 9:29 PM	Collected 1 account statistics
Account Discovery Task	Completed	Discover	Today at 8:08 PM	Discovered 80 accounts

1-4 of 4 Results

Show 25

**Collect Mailbox Statistics Task**

Type: Mailbox Assessment

Created: Sunday, October 29, 2023 10:04 PM

Modified: Sunday, October 29, 2023 10:05 PM

Status: Completed

Last Operation: Collected 0 mailbox statistics from source and 0 from target mailboxes.

Schedule: Now

Accounts (27):  
New: 27  
In Progress: 0  
Failed: 0  
Completed: 0

Copy Diagnostics

Download Premigration Report

## Review the statistics collected

1. Open the **Tasks** tab.
2. Select the Collect Mailbox Statistics Task that you want to review.

3. From the task details pane, click **Download Premigration Report**.
4. Download and save the ZIP file to a suitable folder, and extract the report.

## Review the Collect Mailbox Statistics Task Events

1. Open the **Tasks** tab.
2. Select a task named **Collect Mailbox 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** - name of the account if applicable.
  - 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**.

# Assessment

When you complete the collection of statistics for the mailboxes you can view the reports about the mailboxes. Open the **Assessment** view to see the reports described below.

- **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

Before you proceed, verify that the mail-enabled accounts in the source tenant have been discovered and matched. For more information see [Discovering Accounts](#) or [Matching and Mapping Accounts](#).

In this topic:

- [Considerations](#)
- [Limitations](#)
- [Migrating Rules](#)
- [Migrating Delegate Permissions](#)
- [Migrating Folder Permissions](#)
- [Starting a Mail Migration Task](#)
- [Examples](#)
- [Reviewing the Mail Migration Task](#)

## Considerations

- The following types of mailboxes are supported: Regular, Room, Equipment (Resource), Shared.
- During remigration, On Demand Migration remigrates mail, calendar, task, and sticky note items that have changed in the source mailbox to the target mailbox. Remigration of other types of items that have been modified or deleted in the source mailbox is not supported.

The following types of changes are synchronized during remigration:

*Messages:*

- Message is updated in the target if changed in the source (including changes to drafts).
- Message is moved to a different folder in the target if message is moved in the source.
- Message is deleted in the target if message is deleted in the source.

*Folders and Subfolders:*

- Folder and subfolder names are updated in the target if renamed in the source.
- Folder is moved to a different location in the target if the folder is moved in the source.
- Folder is deleted in the target if folder is deleted in the source.

*Calendar items:*

- Calendar item is updated in the target if the item is changed in the source.
- Calendar item is deleted in the target if the item is deleted in the source.



**NOTE:** If Contacts, Tasks and Sticky Notes items are deleted in the source, they will not be deleted in the target.

- The migration service performs a full comparison of the source and target tenants during remigration if one of the following Mail Migration Task configurations is used, ensuring that messages are not moved or deleted, and folders are not moved, renamed, or deleted in the target:

#### *Mail Folders:*

- Migrate all folders except.
- Migrate specific folders.
- Migrate to custom folder.
- Migrate to folder.

#### *Date Range:*

- Only migrate mail within specified date range.
- Source or target is not Exchange Online (O365).



**NOTE:** Tasks that use the configurations listed above do not save mail synchronization states. As a result, these tasks can impact subsequent tasks, potentially causing messages or folders to remain unchanged (not deleted, moved, or renamed) which leads to duplicates in the target tenant.

- The Microsoft 365 Groups migration service performs a full comparison during remigration as well, between the source and target, ensuring that messages are not moved or deleted, and folders are not moved, renamed, or deleted in the target.
- During mail migration, users may want to receive emails from both source and target mailboxes, or keep custom forwarding. You can set this up in two ways:
  - Select the **Manage Mail Forwarding** options in the **Mail Flow** step of the *New Mail Migration Task* wizard.
  - Set up [mail forwarding](#) with the *New Mailbox Switch Task* wizard after you complete the mail migration.
- For each task, the maximum number of mailboxes is limited to 1000. Please contact Quest Technical Support if larger lists are required in a single task.

## Limitations

On Demand Migration is designed to provide a robust migration experience for a variety of source and target platforms. However, some limitations exist that are the result of inherent discrepancies between email service platforms and cannot be fixed.

### General

- Migration of messages inside the mailbox root folder (TIS / Top of Information Store) is not supported.
- You must discover and match Sensitivity Labels if you plan to migrate email items with label. Otherwise the migration will fail with the error message: "Failed to prepare migration plan, no mapping exists for labels."

### Rules

- Autodiscover must be enabled on your target for successful rules migration.
- During the migration, the name of a group participating in a source rule will be converted to an SMTP email address. The address is retrieved from the mailbox list of the migration plan, and will be used in the corresponding target rule.
- Migration of rules from or to personal archives is not supported.

### Delegates

- Migration of customized delegate permissions is currently not supported:
  - Custom folder permissions are migrated as None (lack of any permissions) when the target delegate does not exist.
  - If the target delegate exists, source and target delegate permissions are merged and the predefined Roles (Editor, Author, Reviewer and None) take precedence over any Custom permission set.
  - If the target delegate exists and both source and target permissions are set to Custom, the target permissions will be set to None.

## Folder Permissions

- Folder permissions for Recoverable Items are not migrated.
- Folder permissions from personal archive and to personal are not migrated.
- The migration service will attempt to migrate permissions for all folders in the mailbox tree and create folders for each, regardless of the content type selected for migration. If a custom folder is specified, non-mail folder permissions are not migrated to the target tenant.

## Migration to a Custom Folder

- Mailbox rules are not migrated.
- Mail folders, their content and permissions are migrated to the custom folder.
- Content and permissions of non-mail folders cannot be migrated either to the custom folder or to their default location because non-mail folders are not migrated to the target tenant when a custom folder is specified.

## Migrating Rules

This includes OWA (Outlook Web App) Inbox rules, and the rules created in an Outlook client version 2019, 2016, 2013, 2010, or Outlook for Microsoft 365. Migration of rules created in Outlook for Exchange 2010 is not supported. 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.

**CAUTION:** If the rules in a user's target Outlook do not match the rules on the server, the following message appears when the user opens the target mailbox in Outlook after migration:

*The rules on this computer do not match the rules on Microsoft Exchange. Only one set of rules can be kept. You will usually want to keep the rules on the server. Which rules do you want to keep?*

**In this case, the user must select "Server" to avoid data loss.**

Rules that contain unsupported conditions or actions will not be migrated, or will not work after migration. So, you must set them up manually on the target.

The following tables list the supported Outlook conditions:

Outlook Condition	Outlook 2019	Outlook 2016	Outlook 2013	Outlook 2010	Outlook for Microsoft 365
from people or public group	Yes	Yes	Yes	Yes	Yes
with specific words in subject	Yes	Yes	Yes	Yes	Yes
through the specified account	No	No	No	No	No



Outlook Condition	Outlook 2019	Outlook 2016	Outlook 2013	Outlook 2010	Outlook for Microsoft 365
sent only to me	Yes	Yes	Yes	Yes	Yes
where my name is in the To box	Yes	Yes	Yes	Yes	Yes
marked as importance	Yes	Yes	Yes	Yes	Yes
marked as sensitivity	Yes	Yes	Yes	Yes	Yes
flag for action	Yes	Yes	Yes	Yes	Yes
where my name is in the Cc box	Yes	Yes	Yes	Yes	Yes
where my name is in the To or Cc box	Yes	Yes	Yes	Yes	Yes
where my name is not in the To box	Yes	Yes	Yes	Yes	Yes
sent to people or public group	Yes	Yes	Yes	Yes	Yes
with specific words in the body	Yes	Yes	Yes	Yes	Yes
with specific words in the subject or body	Yes	Yes	Yes	Yes	Yes
with specific words in the message header	Yes	Yes	Yes	Yes	Yes
with specific words in the recipient's address	Yes	Yes	Yes	Yes	Yes
with specific words in the sender's address	Yes	Yes	Yes	Yes	Yes
assigned to specific category	Yes	Yes	Yes	Yes	Yes
assigned to any category	Yes	Yes	Yes	Yes	Yes
which is an automatic reply	Yes	Yes	Yes	Yes	Yes
which has an attachment	Yes	Yes	Yes	Yes	Yes
with a size in a specific range	Yes	Yes	Yes	Yes	Yes
received in a specific date span	Yes	Yes	Yes	Yes	Yes
uses the specific form	Yes	Yes	Yes	Yes	Yes
sender is in specific Address Book	No	No	No	No	No
with selected properties of documents or forms	Yes	Yes	Yes	Yes	Yes
which is a meeting invitation or update	Yes	Yes	Yes	Yes	Yes
from RSS feeds with specified text in the title	Yes	Yes	Yes	Yes	Yes
from any RSS feed	Yes	Yes	Yes	Yes	Yes
of the specific form type	Yes	Yes	Yes	Yes	Yes
on this computer only	Yes	Yes	Yes	Yes	Yes

The following tables list the supported Outlook actions:

Outlook Action	Outlook 2019	Outlook 2016	Outlook 2013	Outlook 2010	Outlook for Microsoft 365
move it to the specified folder	Yes	Yes	Yes	Yes	Yes
move a copy to the specified folder	Yes	Yes	Yes	Yes	Yes
assign it to the specific category	Yes	Yes	Yes	Yes	Yes
delete it	Yes	Yes	Yes	Yes	Yes
permanently delete it	Yes	Yes	Yes	Yes	Yes
forward it to people or public group	Yes	Yes	Yes	Yes	Yes
forward it to people or distribution list as an attachment	Yes	Yes	Yes	Yes	Yes
redirect it to people or distribution list	Yes	Yes	Yes	Yes	Yes
have server reply using a specific message	No	No	No	No	No
reply using a specific template	Yes	Yes	Yes	Yes	Yes
flag message for action in a number of days	Yes	Yes	Yes	Yes	Yes
clear the Message Flag	Yes	Yes	Yes	Yes	Yes
clear message's categories	Yes	Yes	Yes	Yes	Yes
mark it as importance	Yes	Yes	Yes	Yes	Yes
print it	Yes	Yes	Yes	Yes	Yes
play a sound	Yes	Yes	Yes	Yes	Yes
start application	N/A	No	No	No	N/A
mark it as read	Yes	Yes	Yes	Yes	Yes
run a script	N/A	No	No	No	N/A
perform a custom action	N/A	N/A	N/A	No	N/A
display a specific message in the New Item Alert window	Yes	Yes	Yes	Yes	Yes
display a Desktop Alert	Yes	Yes	Yes	Yes	Yes
apply retention policy	No	No	No	No	No
stop processing more rules	Yes	Yes	Yes	Yes	Yes

The following tables list the supported OWA Inbox conditions:

OWA Condition for Microsoft 365		Microsoft 365
People	From	Yes
	To	Yes
My name is	I'm on the To line	Yes
	I'm on the Cc line	Yes
	I'm on the To or Cc line	Yes
	I'm not on the To line	Yes
	I'm the only recipient	Yes
Subject	Subject includes	Yes
	Subject or body includes	Yes
Keywords	Message body includes	Yes
	Sender address includes	Yes
	Recipient address includes	Yes
	Message header includes	Yes
Marked with	Importance	Yes
	Sensitivity	Yes
	Classification	Yes
Message includes	Flag	Yes
	Type	Yes
	Has attachment	Yes
Message size	At least	Yes
	At most	Yes
Received	Before	Yes
	After	Yes
All messages	Apply to all messages	Yes

The following tables list the supported OWA Inbox actions:

OWA Action for Microsoft 365		Microsoft 365
Organize	Move to	Yes
	Copy to	Yes
	Delete	Yes
	Pin to top	Yes

OWA Action for Microsoft 365		Microsoft 365
Mark message	Mark as read	Yes
	Mark as Junk	Yes
	Mark with importance	Yes
	Categorize	Yes
Route	Forward to	Yes
	Forward as attachment	Yes
	Redirect to	Yes
Stop processing more rules		Yes

## Migrating Delegate Permissions

There are two types of delegate access permissions in Exchange on-premises and Exchange Online, and both of them are supported by ODM:

**Full Access, Send As, Send on Behalf** - These permissions are generally used for mailbox-level access and are configured in the Exchange Admin Center or via PowerShell. For more information, see the Microsoft article: [Manage permissions for recipients in Exchange Online](#).

**Reviewer, Author, Editor** etc. - These permissions are typically used to control access to folders within a mailbox, such as the Inbox or Calendar, and they are set at the folder level. For more information, see the Microsoft article: [About Delegates](#).

On Demand Migration migrates delegate permissions in the following ways.

- If a matched delegate exists in the target, mailbox delegation permissions can be transferred.
- If a matched delegate does not exist in the target, 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 as specified below will be applied.

Source	Target (in case matched delegate does not exist in target)	
Delegate access permission on source	Delegate access permission on target <b>before</b> migration	Delegate access permission on target <b>after</b> migration
<b>None</b>	N/A	<b>None</b>
<b>Reviewer</b>	N/A	<b>Reviewer</b>
<b>Author</b>	N/A	<b>Author</b>
<b>Editor</b>	N/A	<b>Editor</b>
Customized set (except None, Reviewer, Author, Editor)	N/A	<b>None</b>

Source	Target (in case matched delegate exist in target)	
Delegate access permission on source	Delegate access permission on target <b>before</b> migration	Delegate access permission on target <b>after</b> migration
<b>None</b> or customized set (except None, Reviewer, Author, Editor)	<b>None</b> or customized set (except None, Reviewer, Author, Editor)	<b>None</b>
Customized set (except None, Reviewer, Author, Editor)	<b>Reviewer, Author, Editor</b>	<b>Reviewer, Author, Editor</b> values from target.
<b>Reviewer, Author, Editor</b>	Customized set (except None, Reviewer, Author, Editor)	<b>Reviewer, Author, Editor</b> values from source.
<b>Reviewer, Author, Editor</b>	<b>Reviewer, Author, Editor</b>	Most permissive value between the source and target access permissions. Possible values - <b>Reviewer, Author, Editor</b>

## Migrating Folder Permissions

- If the target folder permission does not exist, permissions are migrated as is.
- If the target folder permission exists before a migration starts, the most permissive value between the source and target access permissions will be set.

## Starting a Mail 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 **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **Mail** tile, or click **Open** from the Mail tile to open the *Accounts and User Data* dashboard.
5. Click the **Mailboxes** tab. The *Mailboxes List* opens. If you don't see a list of mailbox-enabled accounts, you must run the *New Account 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 starts. Each step is described below:
8. **Start**
  - a. **Task Name** - You can specify a custom task name. The default name is **Mail Migration Task**.
  - b. **Use the settings from an existing migration template for this task** - select this option if you have already saved a previous migration templates. if this is the first time you are migrating mailboxes, keep this option unchecked.
    - **Select template** - select a template that you previously created, from the dropdown list.

- c. **Go to Summary step** - select this option to preserve the settings and go directly to the last step of the wizard. If you do not select this option, but you have selected a template, you can step through the wizard and edit the settings in the template.
- d. Click **Next**.

## 9. 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 dropdown list appears if the **Set license at target** check box is checked. Select the licensing plan from the dropdown list 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**.

## 10. 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.
- b. Specify which mailbox items you want to transfer to the target by selecting the appropriate check box:

- **Migrate Mail** - select this option to migrate email items.
- **Migrate Calendar** - select this option to migrate calendar items. The organizer of the calendar item will be mapped to the corresponding target tenant user account. Invitees in calendar items are retained as the source tenant user.

**i** **NOTE:** The source tenant links to Microsoft Teams meetings in calendar items are retained and must be migrated separately. For more information see [Migrating Meeting Links](#).

- **Migrate Contacts** - select this item to migrate contacts.
- **Migrate Tasks/Notes** - select this option to migrate tasks and notes.
- **Migrate Recoverable Items** - select this option to migrate recoverable items. If the check box is unchecked these items will not be transferred.
- **Migrate Safe Sender and Blocked List** - select this option to migrate mailboxes that are marked as safe senders and those that are blocked.
- **Reset Migration** - Select this option only when you need to do a full re-migration and not a delta sync of your source content to a target. For example, you want to delete content from the target mailbox and want to re-migrate the source again.

## 11. Migration Settings

**i** **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 rerun the Discovery task to update the information.

- Specify which mailbox settings you want to transfer to the target by selecting the appropriate check box:
  - **Migrate Mailbox Rules** - select this option to migrate mailbox rules. See [Migrating Rules](#) for more details.
  - **Migrate Mailbox Delegation** - select this option to migrate delegation permissions. See [Migrating Delegate Permissions](#) for more details.
    - **Enable Automapping for shared mailboxes** - Auto-mapping is an Exchange & Exchange Online feature. Once enabled, any auto-mapped mailbox will be opened by the delegate's Outlook client in a persistent state with **Full Access** permissions and cannot be closed by the user. If users want to remove the auto-mapped mailbox from their Outlook client, administrative intervention is required to remove the **Full Access** permission or clear the auto-mapping flag.
  - **Migrate Folder Permissions** - select this option to migrate folder permissions. See [Migrating Folder Permissions](#) for more details.
  - **Migrate Auto-Reply** - select this option to migrate auto-reply messages and settings.
  - **Migrate Litigation Hold Settings** - select this option to migrate Litigation Hold settings as described below. This option enables Litigation Hold on the target mailbox if the Litigation Hold is enabled on the source mailbox and it is not enabled on the target mailbox. To reduce the growth of Recoverable Items in the target tenant during incremental migrations, select this option during your final migration task.

**!** **CAUTION:** Migration of Litigation Hold settings will fail if the target mailbox doesn't have the right license type.

### Litigation Hold Settings

- *LitigationHoldDate* - setting is copied as-is from the source mailbox to the target mailbox.
- *LitigationHoldDuration* - setting is copied as-is from the source mailbox to the target mailbox.
- *LitigationHoldEnabled* - setting is copied if the value is set to **True** on the source and **False** on the target.
- *LitigationHoldOwner* - the migration service will check if the configured user in the source tenant is mapped to a user in the target and set appropriately before migrating the setting.
- *RetentionUrl* - setting is copied as-is from the source mailbox to the target mailbox.

b. Click **Next**.

## 12. Sensitivity Labels

Choose how you want to migrate sensitivity labels applied to mailbox contents. Sensitivity labels require specific tenant permissions. They must be discovered and matched before you can use the following options. For more details, see the topic [Sensitivity Labels](#).

**CAUTION:** Encrypted mailbox items may be inaccessible on the target tenant if sensitivity labels that are applied to items in the source tenant are not processed. If an item is encrypted in the source, then with this option enabled, it is decrypted, labels are processed and the item is reencrypted in the target.

- a. **Process document sensitivity labels** - select this checkbox to enable sensitivity label processing if you have already configured and matched sensitivity labels.
- **Remove sensitivity labels from documents migrated to the target** - select this option to clear the labels from migrated items. Labels on items in the source tenant are not changed.
  - **Match and apply corresponding labels to documents migrated to the target** - select this option to match and apply sensitivity labels during migration. If the label in the source item has a matching label in the target (there is a corresponding target label in the On Demand repository), the source label is replaced by the target label. If the label in the source item has no matching label in the target (there is no corresponding target label in the On Demand repository), the item is not migrated.

b. Click **Next**.

## 13. Mail Flow

**i** **NOTE:** You can skip this step and set up [mail forwarding](#) with the *New Mailbox Switch Task* wizard after you complete the mail migration.

- 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. See the **Mail Flow** column value (**To Source** or **To Target**) which can be switched with the switch mailboxes functionality (see [Mail Forwarding](#)).
- **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.
- **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 deactivate mail forwarding using the switch mailboxes functionality described in the topic .

b. Click **Next**.

#### 14. 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 exclude the selected mailbox folders (and subfolders if any) and optionally provide an alternate folder name to migrate all other folder contents. When you select this option the following options are also available:
  - *Folders to ignore*: Choose from Deleted Items, Junk Email, Drafts, Conversation History, Sent Items, and Inbox. You can also specify one or more custom folder paths separated by a semicolon.

##### TIPS:



- When you specify folders in the textbox, type the fully qualified path, for example, Accounting/Notice.
- Make sure the forward slash (/) is used in the path you specify. Example: Accounting/Notice. The backslash (\) is not supported.
- The leading slash is supported, but not required. Both "/Accounting/Notice" and "Accounting/Notice" paths are supported.
- Quotes are not needed even if the folder name contain spaces.
- **Migrate specific folders** - select this option to migrate only the selected mailbox folders (and subfolders if any) and optionally provide an alternate folder name to migrate the specified folder contents. When you select this option the following options are also available:
  - *Folders to include*: Choose from Inbox, Sent Items, Drafts, and Deleted Items. You can also specify one or more custom folder names separated by a semicolon.

##### TIPS:



- When you specify folders in the textbox, type the fully qualified path, for example, Accounting/Notice.

- Make sure the forward slash (/) is used in the path you specify. Example: Accounting/Notice. The backslash (\) is not supported.
  - The leading slash is supported, but not required. Both "Accounting/Notice" and "/Accounting/Notice" paths are supported.
  - Quotes are not needed even if the folder name contains spaces.
- **Migrate content to a custom folder** - select this option to migrate content from source mailbox to a custom folder. To run incremental migration, a mail migration task should be created with the same folder name. Any change in the folder name will be treated as a migration to a new custom folder. See [Limitations](#) for custom folders for more details.
    - **Custom folder name** - specify the name of the custom folder where content will be migrated. For example, all mail from the source mailbox can be migrated to the *Migrated Mailbox* custom folder in the target tenant.
  - **Migrate to folder** - select this option to specify a custom target folder for well known source folders such as **Inbox**, **Deleted Items**, **Archive**, and **Sent Items**. 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 with the same name on the target.
- b. Click **Next**.
15. **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**.
16. **Notification**
- a. Select the options as described below:
    - **Send notification email after the mail migration is completed** - select this option to send a notification email when the mailbox migration task completes. The notification is sent whether or not the mailbox migration succeeds unless the **Only in a case of failure** option is selected.
    - **Only in a case of failure** - select this option to send the notification email only when one or more mailboxes cannot be migrated. When this option is selected, a notification email will not be sent if all the mailboxes are migrated successfully.
    - **Recipients** - enter a semicolon-delimited list of mailboxes where the notification will be sent. The mailbox of the current user will be entered by default and can be changed.
- i** **NOTE:** Notifications are sent from **no-reply@quest-on-demand.com**. Recipients must add this email address to the *Safe Senders* List.

To add the email address to your *Safe Senders* list in Microsoft Outlook, do the following:

  - a. On the **Home** tab, click **Junk**, and then click **Junk E-mail Options**.
  - b. On the **Safe Senders** tab, click **Add** and add the **no-reply@quest-on-demand.com** e-mail address.

The notification that is sent will contain the following information in the email body:

- **Project id** - the unique identifier of the project.
- **Task id** - the unique identifier of the task.
- **Type** - the type of the task: *Mail Migration*.
- **Created** - the data and time when the task was created.
- **Modified** - the most recent date and time when the task was modified.
- **Status** - the state of the task.
- **Last operation** - The last recorded event in the task.
- **Schedule** - indicates when the task was run.
- **Mailboxes** - The number of mailboxes selected for this migration categorized by migration status (New, Stopped, In Progress, Failed, and Completed) and count.

b. Click **Next**.

#### 17. 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** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.

b. Click **Next**.

#### 18. Reporting

Select the check box **Generate detailed report of migration errors** to generate a migration error report when you run the *Mail MigrationTask*.

You can download the report from the **Reports** tab of the *Accounts and User Data* migration workspace by clicking the **Download** link in the **Error Log** column. If there are no migration errors, a download link is not available. Error reports are retained for 30 days. After 30 days the download link is replaced with the label **Expired** and you can no longer download the report. For more information about error reports, see [Reports](#).

#### 19. Summary

- a. **Save task settings as a template** - select this option to save the settings in this wizard as a reusable migration template.
- **Template Name** - specify a name for the template. If you have changed the settings of a preselected template, specify the same template name to apply the changes to the template when you complete the wizard. All saved templates are displayed in the [Templates](#) tab.
- b. Review the task summary. You can specify a custom task name. The default name is **Mail Migration Task**.
- c. Click **Back** to change configurations if necessary or click **Finish** to save or start the task depending on the schedule option selected.



**NOTE:** Before the actual mail migration begins, a mailbox is activated by fetching a list of calendars using Graph API and delegated type of permissions. This is necessary as per Microsoft's recommendation to set the calendar configuration correctly before running the meeting link task.

## Examples

### Example 1

#### Task options selected:

- Migration Options: **Migrate Mail** and **Migrate Calendar**
- Migration Settings: **Migrate Folder Permissions**

#### Result:

- A folder for each supported content type is created in the target tenant account mailbox tree, regardless of the content type selected.
- Mail folders, their content and permissions are migrated.
- Permissions of all folders are migrated regardless of the content type selected.

### Example 2

#### Task options selected:

- Migration Options: **Migrate Mail** and **Migrate Calendar**
- Migration Settings: **Migrate Folder Permissions**
- Mail Folders: **Migrate content to a custom folder** > *MyFolder*

#### Result:

- A custom folder called *MyFolder* is created in the target tenant account mailbox.
- A folder for each supported content type is created in *MyFolder*, regardless of the content type selected.
- Mail folders, their content and permissions are migrated to *MyFolder*.
- Calendar folders, their content and permissions are not migrated, either to *MyFolder* or their default locations, because they are non-mail folders.

## Reviewing the Mail Migration Task

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 State** column in the Mailboxes list view. The column values during and after a task is run are as follows:

Column value	Description
Migrated	Migration is complete and successful.
Migrated with Issues	Migration has completed with errors.
Migrating	Migration of this object has started.
Migration failed	Migration did not succeed.

Column value	Description
Migration stopped	Migration canceled by the user.
Provisioning	Mailbox is being set up in the target tenant.
Provisioning Failed	Mailbox could not be set up in the target tenant.
Queued	Mailbox migration task is waiting for migration service resources to be available.

## Migrating Meeting Links

When a calendar item with a link to a Microsoft Teams meeting is migrated, the link to the original Teams meeting in the source tenant is retained. Use the Meeting Link Migration Task to update Microsoft Teams meeting links in the target tenant.

**How it works:** The meeting link migration task creates a new Teams meeting with the original meeting details in the target tenant. It sets the target user as the organizer. This new meeting invite must be accepted by all participants. The original meeting migrated to the target is canceled. The cancellation email is automatically sent out to the organizer and attendees.

### Considerations

- The attendee list is not updated to match the target domain.
- A cancellation email is sent out to the organizer and attendees. Since the source attendees are not replaced with the corresponding target ones, the cancellation email is sent out to the source tenant.
- A new meeting is created if the migrating user is the organizer of that particular Teams meeting.
- A meeting is not recreated if the source meeting was created in Microsoft Teams through a Teams channel.
- On Demand Migration recreates present and future meetings, both one-time and recurring meetings. Meetings that happened in the past are migrated with Calendar migration.
- Recurring meetings with modified instances are reset to original settings after migration.
- The subsequent runs of the Meeting Link Migration Task will skip the meetings which were previously processed.
- Properties like a flag and categories are not supported with this migration.



#### IMPORTANT:

Mailbox migration with the **Migrate Calendar** option selected, must be completed before starting this task.

#### To migrate meeting links:

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **Mail** tile, or click **Open** from the Mail tile to open the *Accounts and User Data* dashboard.

5. Click the **Mailboxes** tab. From the *Mailboxes List*, select the pre-migrated mailboxes in the list for which you want to migrate the meeting links. You can use search, filtering or collections to quickly navigate through the list of mailboxes.
6. From the *Mailboxes List* toolbar, click **More > Meeting Link Migration**. The *New Meeting Link Migration Task* wizard starts. Each step is described below:
7. **Start**
  - a. **Task Name** - You can specify a custom task name. Default name is **Meeting Link Migration Task**.
  - b. **Use the settings from an existing migration template for this task** - select this option if you have already saved a previous migration templates. if this is the first time you are migrating mailboxes, keep this option unchecked.
    - **Select template** - select a template that you previously created, from the dropdown list.
  - c. **Go to Summary step** - select this option to preserve the settings and go directly to the last step of the wizard. If you do not select this option, but you have selected a template, you can step through the wizard and edit the settings in the template.
  - d. Click **Next**.
8. **Custom Email Message**

Customize the cancellation message in the text box.
9. **Notification**
  - a. **Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
    - **Only in a case of failure** - Select this option to send the email if the discovery task fails to complete successfully.
  - b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
  - c. Click **Next**.
10. **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** - task runs immediately.
    - **Run later** - task must be started manually.
    - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
  - b. Click **Next**.
11. **Summary**
  - a. **Save task settings as a migration template** - select this option to save the settings in this wizard as a reusable migration template.
    - **Migration Template Name** - specify a name for the template. If you have changed the settings of a preselected template, specify the same template name to apply the changes to the template when you complete the wizard. All saved templates are displayed in the [Templates](#) tab.

- b. Review the task summary. You can specify a custom task name. Default name is **Meeting Link Migration Task**.
- c. Click **Back** to change configurations if necessary or 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 and filter for tasks where **Type** = Meeting Link Migration. You can view the summary on the [Dashboard](#) or monitor alerts and notifications in **Events**.

# Mail Forwarding

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:

Task Type	Before		After	
	Source. ForwardingSMTPAddress	Target. ForwardingSMTPAddress	Source. ForwardingSMTPAddress	Target. ForwardingSMTPAddress
Mail migration (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.
Mail Migration (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	Remains unchanged

	Before		After	
Task Type	Source. ForwardingSMTPAddress	Target. ForwardingSMTPAddress	Source. ForwardingSMTPAddress	Target. ForwardingSMTPAddress
			from selected custom domain for forwarding, if set	
	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
Mail Migration: Remove	Not set / Set to any SMTP address except for target *	Points to source**	Remains unchanged	Not set (cleared)
	Points to target *	Not set / Set to any SMTP address except for source **	Not set (cleared)	Remains unchanged
	Not set / Set to any SMTP address except for target *	Not set / Set to any SMTP address except for source **	Remains unchanged	Remains unchanged
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



Task Type	Before		After	
	Source. ForwardingSMTPAddress	Target. ForwardingSMTPAddress	Source. ForwardingSMTPAddress	Target. ForwardingSMTPAddress
				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

## Switching Mailboxes

The mailbox switching task allows customers to set up mail forwarding as the final step in the migration and mark the mailbox state as **Switched**. This task may not be required if forwarding was set during the mail migration task.

### To start a Mailbox Switch 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 **Migrate > Projects** to open the *My Projects* list.
3. Create a new *Office 365 Services* project or open an existing project.
4. Click the **Mail** tile, or click **Open** from the Mail tile to open the *Accounts and User Data* dashboard.
5. Click the **Mailboxes** tab. The *Mailboxes List* opens. Select the mailbox accounts in the list that you want to switch. 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.
6. From the actions, click **Switch Mailboxes**. The *New Mailbox Switch Task* wizard starts. Each step is described below:
7. **Start**
  - a. **Task Name** - You can specify a custom task name. The default name is **Mailbox Switch Task**.
  - b. **Use the settings from an existing migration template for this task** - select this option if you have already saved a previous migration templates. if this is the first time you are migrating mailboxes, keep this option unchecked.
    - **Select template** - select a template that you previously created, from the dropdown list.
  - c. **Go to Summary step** - select this option to preserve the settings and go directly to the last step of the wizard. If you do not select this option, but you have selected a template, you can step through the wizard and edit the settings in the template.
  - d. Click **Next**.

## 8. Mail Flow

a. Select options as described below:

- **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. See the Mail Flow column value (To Source or To Target) which can also be switched as part of a migration task (see Migrating Mailboxes).
- **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.
- **Mark Mailbox State column as Switched** – select this check box to change the Mailbox State from its current value to “Switched”.

b. Click **Next**.

## 9. Notification

a. Select options as described below:

- **Send notification to original mailboxes** – select this check box to configure a notification to send to the user’s original mailboxes
- **Send notification to new mailboxes** – select this check box to configure a notification to send to the user’s new mailboxes

The notification that is sent can be customized for the following attributes:

- **Sender’s email address** – the value that should be displayed as the Sender’s email address
- **Send from** – the value that should be displayed as the Sender’s Display Name
- **Subject** – the text that should be displayed as the message Subject
- **Message** – the text that should be displayed in the message body

b. Click **Next**.

## 10. 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** - task runs immediately.
- Run later** - task must be started manually.
- Schedule** - task will be started at a future date and time. Enter the start time for the task.

b. Click **Next**.

## 11. Summary

a. **Save task settings as a migration template** - select this option to save the settings in this wizard as a reusable migration template.

- **Migration Template Name** - specify a name for the template. If you have changed the settings of a preselected template, specify the same template name to apply the changes to the template when you complete the wizard. All saved templates are displayed in the [Templates](#) tab.

- b. Review the task summary. You can specify a custom task name. The default name is **Mailbox Switch Task**.
12. Click **Back** to change configurations if necessary or click **Finish** to save or start the task depending on the schedule option selected.

## Switching Applications in a Domain Move Scenario

When performing a tenant-to-tenant migration that includes a domain move, On Demand Migration needs to refresh the source and target usernames and email addresses after the domain move to ensure that the Desktop Update Agent works as expected. To use the Desktop Update Agent after moving a domain from one tenant to another, perform the following procedure:

1. Complete the Domain Move.
2. Confirm that the updated usernames and email addresses are shown in the source and target tenants.
3. Re-run the *New Account Discovery Task* wizard to refresh source usernames and email addresses.
4. Re-run the *New Account Matching Task* wizard to refresh target usernames and email addresses.
5. Run the *New Switch Applications Task* wizard. Select the options to **Skip mailbox state validation** and **Skip OneDrive state validation** if the account migration states were reset to **Matched**. For more information, see [Configuring the Switch Applications Task](#) in the *Desktop Update Agent User Guide*.

**i** **NOTE:** If you run the New Switch Applications Task before the domain move is complete, you will not need to re-run the task since the Desktop Update Agent will check the source and target user information at the time the end-user runs the tool.

# OneDrive Migration

When the user accounts are matched or migrated, you can transfer the content of their OneDrive for Business stores to the target tenant.

## What We Migrate

Migration limitations indicated below may not be an exhaustive list of limitations as some may appear in unique customer migration scenarios, or arise due to platform or legacy support restrictions. In some cases, a solution to a limitation may already be on the product roadmap.

Quest On Demand migrates the following OneDrive components:

### Objects and content types

Object	Support	Notes
<b>Document</b> Document size can be up to 100 GB.		
Authorship properties: <ul style="list-style-type: none"> <li>Created Date</li> <li>Created by</li> <li>Last Modified Date</li> <li>Last Modified By</li> </ul>	✓	
Document properties	✓	
Document permissions	✓	
Versions and Version History	✓	
<b>Folder</b>		
Properties	✓	
Folder permissions	✓	
<b>Permissions</b>		
Direct Sharing Permissions	✓	Permissions for: <ul style="list-style-type: none"> <li>Internal Users</li> <li>Groups</li> <li>Guest (External) Users</li> </ul>

Object	Support	Notes
Custom level permissions	✓	
Link Sharing Permissions	✓	Permissions for: <ul style="list-style-type: none"> <li>• Internal Users</li> <li>• Groups</li> <li>• Guest (External) Users</li> </ul>
<b>M365 security and compliance features</b>		
Legal Hold	✗	
Retention Labels	✗	
Microsoft Information Protection policies and labels	✗	
M365 Compliance Customer Lockbox	✗	
<b>Power Platform features</b>		
Power Apps	✗	
Power Pages	✗	
Power Automate (Flow)	✗	
Power Virtual Agents	✗	
<b>Others</b>		
Microsoft public preview features	✗	In general, Microsoft public preview features are not supported in production migrations. These features may also take additional time to fully develop and test for release to production.
Personal SharePoint Lists	✗	
SharePoint subsites, lists and libraries added to a user's OneDrive	✗	
Shortcut	✗	
Whiteboard	✓	The folder that contains the Whiteboard files is migrated. If you plan to migrate Teams, you must pre-migrate the Whiteboard files created by the Whiteboard creator.

## Limitations

Only the latest version of frequently updated files such as outlook PST files, database files and log files will be migrated.

## Considerations

Before starting the OneDrive migration consider the following:

- When active or expired Sharing Links are migrated, existing permissions are converted to direct permissions in the target tenant.
- Migrating Sharing Link permissions for external users requires the external user be an Azure Active Directory guest.
- Migrating Authors and 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.
- Document with URLs longer than 400 characters cannot be migrated to a target tenant.
- Very large OneDrives with hundreds of thousands of files or files that are 500 GB or larger, should be divided into two or more OneDrives to improve migration throughput.

## Prerequisites

- You must match or migrate user accounts in the migration project to ensure that membership, content ownership, and permissions are processed correctly.
- The target tenant should have the fully configured OneDrive feature with a valid license plan. Licenses can be automatically assigned to the target users during the migration.
- Tenant administrator consents are granted for source and target tenants. The following consents should be granted for OneDrive migration feature:
  - Migration - Basic
  - Migration - SharePoint

If tenant administrator consents are not granted or have expired, account discovery will be deactivated and you will be unable to continue.

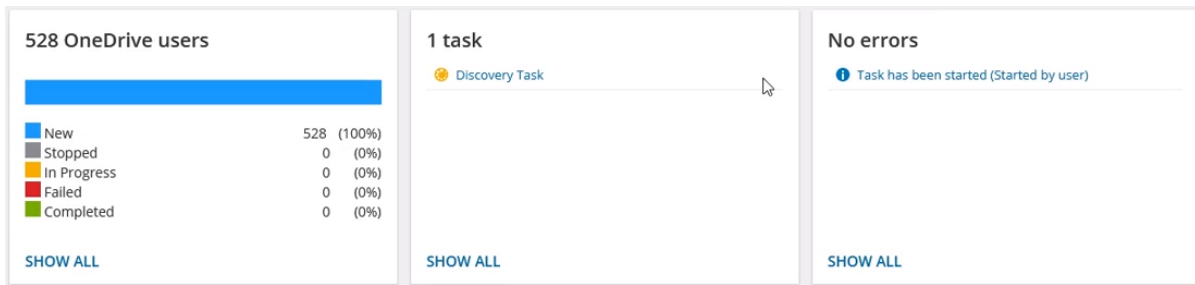
- Tenant administrator credentials must also be provided for both tenants in the Configure Connections dialog.

## Prerequisites

- You must match all accounts in the project to ensure that membership and content ownership are processed correctly.
- The following admin consents should be granted for SharePoint migration:
  - Migration - Basic
  - Migration - OneDrive - Minimal (for source)
  - Migration - OneDrive - Full (for source and target)

## Dashboard

The On Demand Migration **Dashboard** tab in the *Accounts and User Data* migration workspace provides summary information about migration tasks and events. The **OneDrive users** tile indicates the number of OneDrive users and the status of their migration.



## OneDrive List View

The List View displays the summary of the OneDrive information from the source and target tenants. Initially, the List View displays the list of accounts and other columns are blank. As you run the discovery, collect statistics and migration tasks, the list view will display more information about the accounts and the state of the OneDrive migrations.

To open the List View, open the *Accounts and User Data* migration workspace. Then select the **OneDrive** tab and then select **List View** if not already selected.

The List View has several predefined filters to help you search for accounts based on OneDrive account information:

- **Last Run Status** - returns a list of OneDrive accounts based on the status of the latest task. See the **Last Run Status** column description below for filter values.
- **Migration State** - returns a list of OneDrive accounts based on the migration state of the OneDrive. See the **Migration State** column description below for filter values.
- **Account Matching** - returns the list of OneDrive accounts that are either **Matched** or **Unmatched**.
- **Collect Statistics Status** - returns a list of OneDrive accounts based on the state of the Collect Statistics task for the OneDrive account. See the **Collect Statistics** column description below for filter values.

DASHBOARD ACCOUNTS MAILBOXES **ONEDRIVE** DESKTOP AGENTS REPORTING EVENTS TASKS

List View Assessment Migration State: Any Account Matching: Any Last Run Status: Any

	NAME	MIGRATION STATE	PRIORITY	COLLECT STATISTICS	PROVISIONING	L.	SOURCE ITEMS	SOURCE SIZE	TARGET ITEMS	LAST RUN STATUS	SOURCE UPN	TARGET UPN
<input type="checkbox"/>	testuserau	Discovered		Completed	Completed	3	51.2 KB	11		New	testuserau@odm1.onmicrosoft.com	testuserau@odm2.onmicrosoft.com
<input type="checkbox"/>	puser00	Migrated		Completed	Completed	2151	1.4 GB	4303		Completed	puser00@odm1.onmicrosoft.com	puser00@odm2.onmicrosoft.com
<input type="checkbox"/>	testuseruk	Discovered		Completed	Completed	8	272.8 KB	8		New	testuseruk@odm1.onmicrosoft.com	testuseruk@odm2.onmicrosoft.com
<input type="checkbox"/>	testuserie	Discovered		Completed	Completed	8	272.8 KB	8		New	testuserie@odm1.onmicrosoft.com	testuserie@odm2.onmicrosoft.com
<input type="checkbox"/>	testuserca	Discovered		Completed	Completed	8	273.7 KB	8		New	testuserca@odm1.onmicrosoft.com	testuserca@odm2.onmicrosoft.com
<input type="checkbox"/>	MUser4	Discovered		Completed	Completed	4	62.8 KB	3		Completed	MUser4@odm1.onmicrosoft.com	MUser4@odm2.onmicrosoft.com
<input type="checkbox"/>	Fit Admin	Migrated	Medium	Completed	Completed	5	94.3 KB	2008		Completed	ftadmin@odm1.onmicrosoft.com	ftadmin@odm2.onmicrosoft.com
<input type="checkbox"/>	testuserus	Migrated	Medium	Completed	Completed	8	336.4 KB	8		Completed	testuserus@odm1.onmicrosoft.com	testuserus@odm2.onmicrosoft.com
<input type="checkbox"/>	MUser2	Provisioning Failed	Medium	Completed	Completed	7	169.8 KB	2		Failed	MUser2@odm1.onmicrosoft.com	MUser2@odm2.onmicrosoft.com
<input type="checkbox"/>	jiang Admin	Discovered		Completed	Completed	0	11	56.5 GB	0		jiang@odm1.onmicrosoft.com	jiang@odm2.onmicrosoft.com
<input type="checkbox"/>	puser01	Migrated		Completed	Completed	0	2151	1.4 GB	0	Completed	puser01@odm1.onmicrosoft.com	puser01@odm2.onmicrosoft.com
<input type="checkbox"/>	MUser1	Partially Migrated		Completed	Completed	0	52	15.7 MB	0	Completed	MUser1@odm1.onmicrosoft.com	MUser1@odm2.onmicrosoft.com
<input type="checkbox"/>	odmShareUser368	Not Migratable		Not Provisioned/...	Unknown					New	odmShareUser368@odm1.onm...	-

The columns in the List View are as described below. Use the **Edit Columns** List View Actions Menu to show or hide columns in the list:

1. **Name** - name of the account in the source tenant.
2. **Migration State** - indicates various stages in the migration process.
  - <blank> - no task has been run yet. Use **Unknown** in the filter.
  - **Discovery Failed** - failed to retrieve source site or statistics data, or other errors occurred.
  - **Discovered** - retrieved statistics from source.
  - **Not Migratable** - source has no license or OneDrive not provisioned.
  - **Provisioning** - started provisioning OnDrive in the target tenant.
  - **Provisioning Failed** - OneDrive provisioning failed due to license or credential errors.
  - **Provision Pending** - no provisioning errors, but OneDrive not provisioned after 1 hour. Customers must rerun the migration task within 24 hours or manually provision the target
  - **Provisioned** - OneDrive provisioned and verified in target tenant.
  - **Queued** - task is waiting for migration service resources to be available. For more information, see [How Queuing Works](#).
  - **Migrating** - source and target tenants analyzed and migration started.
  - **Migration Failed** - critical error occurred nothing has been migrated. See task event details for more information.
  - **Migrated with Issues** - some content is migrated but errors or warnings were encountered during migration. Use a reporting task to look for missing files or other errors.
  - **Partially Migrated** - migration is successful, but source item count is larger than target item count after migration. See task event details for more information.
  - **Migrated** - OneDrive migrated successfully to the target tenant.
3. **Collect Statistics** - the state of the Collect Statistics task for the OneDrive account. An empty value 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.
4. **Provisioning** - when OneDrive is provisioned for the user on the target, the value is set to **Completed**.
5. **Items Migrated (%)** - percentage of files that have been migrated to the target
6. **Source Items** - number of items in the OneDrive for the source account. If there is no value the account has not yet been assessed.
7. **Source Size** - total size of all the files in OneDrive for the source account. If there is no value the account has not yet been assessed.
8. **Source Last Modified** - indicates the date and time of the last modification of the source OneDrive. Every time the statistics or migration task is run this value will be updated according to the source date.



9. **Target items** - number of items in the OneDrive for the target account. If there is no value, you did not select the option in the *New OneDrive Collect Statistics Task* wizard to collect item count statistics from the target account, the account is not available, OneDrive has not been provisioned or the account has not yet been assessed.
10. **Last Successful Run** - date and time of the last successful migration. This column is hidden by default.
11. **Last Run Status** - indicates the status of the latest task. Valid values are **New**, **In Progress**, **Completed**, **Failed**, or **Stopped**.
12. **Source UPN** - User Principal Name (UPN) of the source account.
13. **Source Root Url** - relative path of the source OneDrive root URL.
14. **Target UPN** - User Principal Name (UPN) of the target account.
15. **Collections** - indicates the most recent collection where the corresponding account is added and the number of additional collections that also contain this object.

## OneDrive Details

When you select an account from the List View, the OneDrive Detail pane opens. The information in the pane is described below:

- **Source Email** - email address of the selected account in the source tenant.
- **Target Email** - email address of the selected account in the target tenant.
- **Provisioning** - when OneDrive is provisioned for the user on the target, the value is set to **Completed**.
- **Migration Progress (%)** - percentage of files that have been migrated to the target.
- **Source Items** - number of items in the OneDrive for the source account. If there is no value the account has not yet been assessed.
- **Target items** - number of items in the OneDrive for the target account. If there is no value, you did not select the option in the *New OneDrive Collect Statistics Task* wizard to collect item count statistics from the target account, the account is not available, OneDrive has not been provisioned or the account has not yet been assessed.
- **Last Run Status** - indicates the status of the latest task. Valid values are **New**, **In Progress**, **Completed**, **Failed**, or **Stopped**.
- **Last Successful Run** - date and time of the last successful migration. This column is hidden by default.
- **Events** - count of the events that occurred during OneDrive processing through one or more tasks.
- **Collections** - list of collections that contain the corresponding account.
- **Tasks** - list of tasks invoked for the selected OneDrive.

# Managing OneDrive Accounts with Collections

See the topic [Managing Accounts with Collections](#). The actions and steps described in the topic are the same for managing Mailboxes accounts with collections.

# Collecting Statistics

The **Collect OneDrive Statistics Task** conducts an assessment of OneDrive related to all accounts in the source tenant and matching accounts in the target tenant: The assessment report provides the following information among others:

- 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 **Collect OneDrive Statistics Task** generates events. Events are milestones that a task achieves as it runs. For example, when a **Collect OneDrive 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 **Collect OneDrive 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.

**i** | **NOTE:** Before you proceed, verify that the source tenant accounts have been discovered. For more information see [Discovering Accounts](#)

In this topic:

- [Starting a Collect OneDrive Statistics Task](#)
- [Reviewing the Collect OneDrive Statistics Task](#)
- [Reviewing the statistics collected](#)
- [Reviewing the events for the Collect OneDrive Statistics Task](#)

## Starting a Collect OneDrive Statistics Task

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **OneDrive** tile, or click **Open** from the OneDrive tile to open the *Accounts and User Data* dashboard.
5. Select the **OneDrive** tab and then select **List View** if not already selected. Then select any account in the list to activate the menu options.
6. Click **Collect Statistics** from the *Actions* ribbon. The *New Collect OneDrive Statistics Task* wizard starts. Each step is described below:
7. **Description**

**i** | **NOTE:** Statistics are collected from the source tenant by default.

- a. **Include collection of item count from target OneDrive accounts** - select this option to include item count statistics from the target account and generate the [Comparison Report](#).

**New OneDrive Collect Statistics Task**

Description

Schedule

Summary

Collect Source OneDrive size and item counts for the selected OneDrive accounts.

☐ Include collection of item counts from Target OneDrive accounts

Important: Task duration depends on the number of accounts selected. Approximate duration is 2 minutes for each 1000 accounts.

Step 1 of 3

Back Next Finish Cancel

- b. Click **Next**

## 8. 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** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.

- b. Click **Next**.

## 9. Summary

- a. Verify the task specifications as described below:
  - i. **Name** - name of the task. You can specify a custom name. The default name is **Collect OneDrive Statistics Task**.
  - 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. **Collect target statistics** - indicates whether you have opted to include item count statistics from the target account.
  - v. **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.

## Reviewing the Collect OneDrive Statistics Task

1. Open the **Tasks** tab.
2. Select the Collect OneDrive 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. **State** - 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.

The screenshot displays the 'TASKS' tab in the Migration Center. The main table shows a list of tasks with columns for Title, State, Type, Created, and Operation. The 'OneDrive Collect Statistics Task' is selected. The task details pane on the right provides more information about this specific task, including its type (OneDrive Assessment), creation and modification timestamps, status (Completed), last operation (Started by user), and schedule (Now). A progress bar for 'Accounts (1)' shows 1 Completed, 0 Stopped, and 0 Failed. At the bottom of the details pane, the 'Download Premigration Report' button is highlighted with an orange border.

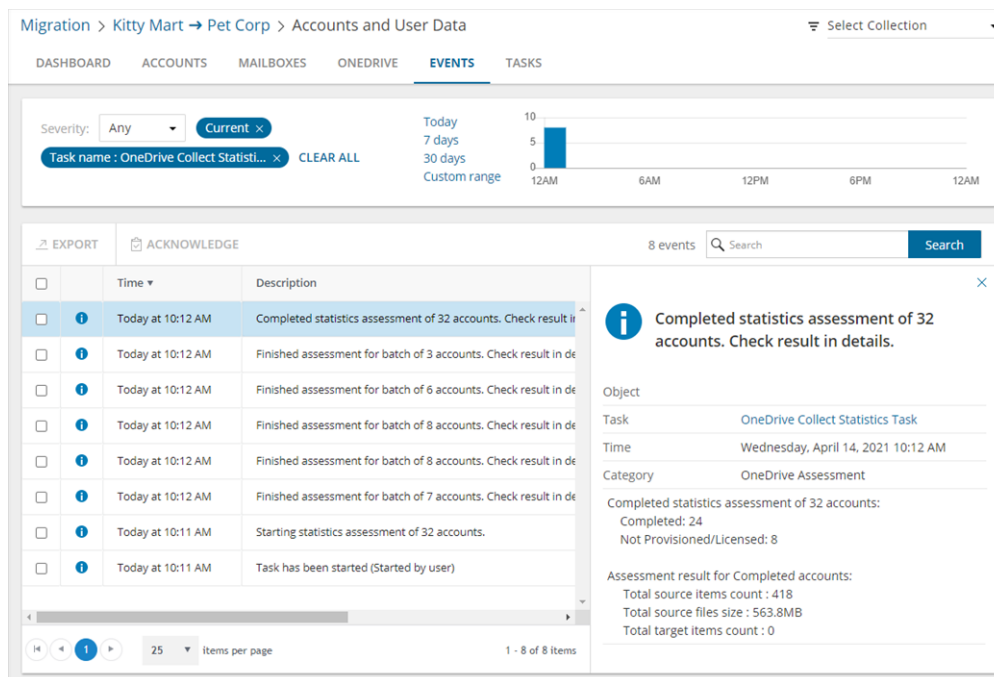
## Reviewing the statistics collected

1. Open the **Tasks** tab.
2. Select the Collect OneDrive Statistics Task that you want to review.
3. From the task details pane, click **Download Premigration Report**. If comparison reports were generated, click **Download comparison report**.
4. Download and save the ZIP file to a suitable folder, and extract the report.

## Reviewing the events for the task

1. Open the **Tasks** tab.
2. Select a task named **Collect OneDrive 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** - name of the account if applicable.
  - 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 **Total file size** from the source, and the **Total target items count** from the target tenant if data is available.



## Migrating OneDrive

You can migrate OneDrive for discovered and matched accounts with large selection of migration options. These options give you control over the scope of files migrated, permissions, licensing and version management

In this topic:

- [Recommendations](#)
- [Starting a OneDrive Migration Task](#)

- [Tracking the progress of the migration task](#)
- [Viewing the report](#)

## Recommendations

The OnDemand migration service for OneDrive attempts to provision OneDrive for accounts being migrated if the OneDrive has not been provisioned. You can manually provision the OneDrive before a migration as described below:

1. Provision OneDrive for accounts in the target tenant that don't have a OneDrive provisioned.
  - For a small number of target users, you can manually provision the OneDrive from the Office 365 admin console of the target tenant.
  - For a large number of target users, run a PowerShell script to provision the OneDrive. For more details, see <https://docs.microsoft.com/en-us/onedrive/pre-provision-accounts>
2. OneDrive must be provisioned at least 24 hours before starting a migration.

## Starting a OneDrive Migration Task

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **OneDrive** tile, or click **Open** from the OneDrive tile to open the *Accounts and User Data* dashboard.
5. Open the *OneDrive* tab and verify that the *List View* displays the list of user Accounts. See [Discovering Accounts](#) if the list is empty.
6. Select one or more accounts for which you migrate the OneDrive contents. This enables the **Migrate OneDrive** menu option.



**NOTE:** To migrate OneDrive for user accounts in a collection

- a. Select the collection from the dropdown menu in the top right corner labeled **Select Collection**.
- b. Select the accounts to migrate from the collection. To check all accounts, select the check box in the list header.
- c. Proceed to the next step.

7. Click **Migrate OneDrive** to open the *New OneDrive Migration Task* wizard and follow the steps described below.

### 8. Start

- a. **Use the settings from an existing migration template for this task** - select this option if you have already saved a previous migration templates. if this is the first time you are migrating mailboxes, keep this option unchecked.
  - **Select template** - select a template that you previously created, from the dropdown list.
- b. **Go to Summary step** - select this option to preserve the settings and go directly to the last step of the wizard. If you do not select this option, but you have selected a template, you can step through

the wizard and edit the settings in the template.

c. Click **Next**.

## 9. Migration Options

New OneDrive Migration Task

Start ✓

Migration Options

Version Options

Attribute Options

Sensitivity labels

Licensing Plan

Filter Items

Notification

Schedule

Auto Re-run

Reporting

Summary

Specify the file migration action:

☐ Overwrite target files

☒ Skip if the target file is the same version or newer

☐ Overwrite if the target file is older or make a copy if the target file is newer

Note: A source file migrated to target as a copy will be renamed. Eg. Sample.txt will be renamed to Sample\_migration\_copy.txt

Specify an alternative migration location:

Relative folder path

Step 2 of 11

Back Next Finish Cancel

a. Choose a migration action

- **Overwrite target files** - Select this option to overwrite the file in the target tenant if it was previously migrated.
- **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.
- **Overwrite if the target file is older or make a copy if the target file is newer** - Select this option to overwrite the file in the target tenant if it was previously migrated and the file in the target is an older version, or create a copy of the source file if it was previously migrated and the file in the target is a newer version. When a copy is created in the target it will be renamed. For example, `Sample.txt` will be renamed to `Sample_migration_copy.txt`. If the file versions in the source and target are the same, it is skipped.



**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 second or third option. New files or folders are not impacted. The migration service compares both file versions and modified date to determine older or newer files.

b. [Optional] Files are migrated to the root folder. You can specify an alternate target migration folder

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

c. Click **Next**.

## 10. Version Options

**New OneDrive Migration Task**

Start ☒ Migration Options ☒ **Version Options** Attribute Options Sensitivity labels Licensing Plan Filter Items Notification Schedule Auto Re-run Reporting Summary

Choose how many versions to migrate

☐ Latest version only

☒ More versions

☐ All versions. Requires significantly more time to migrate

Choose the maximum number of file versions to migrate

Number of versions

Choose which versions to migrate

Note: The Microsoft 365 AutoSave feature saves multiple versions in each editing session.

☒ Latest version and preceding versions

☐ Latest version and daily latest from preceding days

Choose a file size limit

If the latest version exceeds the file size limit, it will be migrated but previous versions will be ignored

Size limit

Step 3 of 11

[Back](#) [Next](#) [Finish](#) [Cancel](#)

### 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:



**NOTE:** Only the latest version of frequently updated files such as outlook PST files, database files and log files will 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 dropdown list. 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 dropdown list. 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**.

## 11. 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. Sharing Links are not migrated unless **Convert Sharing Links permissions to direct permissions** is selected.
  - **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. Sharing Links are not migrated unless **Convert Sharing Links permissions to direct permissions** is selected.
- c. Auto rerun: Select whether to migrate permissions with the Auto rerun task to reduce the task load
- **Migrate permissions with the Auto rerun task** - the permissions will be migrated with the Auto rerun task after the migration completes.
- d. Permission conversion
- **Convert Sharing Links permissions to direct permissions** - migration is slower with this option select. Select this option to convert Sharing Links permissions of files or folders in the source tenant to direct permissions in the target tenant. Only shared links that were activated by the users or group members (the user or group member clicked on the link to access the file or folder) in the source tenant will be migrated and converted to direct permissions. Users or group members who did not activate a shared link in the source tenant will not get the direct permissions in the target tenant and must re-request permissions from the owner when they access the file or folder 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 (Microsoft 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**

## 12. Sensitivity Labels

The screenshot shows the 'New OneDrive Migration Task' wizard at Step 5 of 12, titled 'Sensitivity labels'. On the left is a vertical navigation pane with the following steps: Start, Migration Options, Version Options, Attribute Options, Sensitivity labels (highlighted with an orange bar), Licensing Plan, Filter Items, Notification, Schedule, Auto Re-run, Reporting, and Summary. The main area contains three radio button options for 'Process document sensitivity labels':

- ☒ Process document sensitivity labels
- ☐ Remove sensitivity labels from documents migrated to the target.
- ☐ Match and apply corresponding labels to documents migrated to the target.

At the bottom right are four buttons: 'Back', 'Next' (highlighted in blue), 'Finish', and 'Cancel'. The text 'Step 5 of 12' is located at the bottom left of the main area.

Choose how you want to migrate sensitivity labels applied to OneDrive files. Sensitivity labels require specific tenant permissions. They must be discovered and matched before you can use the following options. For more details, see the topic [Sensitivity Labels](#).

- a. **Process document sensitivity labels** - select this checkbox to enable sensitivity label processing if you have already configured and matched sensitivity labels.

**CAUTION:** Encrypted documents may be inaccessible on the target tenant if sensitivity labels that are applied to documents in the source tenant are not processed. If a document is encrypted in the source, then it is decrypted, labels are processed and the document is reencrypted in the target.

- **Remove sensitivity labels from documents migrated to the target** - select this option to clear the labels from migrated documents. Labels on documents in the source tenant are not changed.
- **Match and apply corresponding labels to documents migrated to the target** - select this option to match and apply sensitivity labels during migration. If the label in the source document has a matching label in the target (there is a corresponding target label in the On Demand repository), the source label is replaced by the target label. If the label in the source document has no matching label in the target (there is no corresponding target label in the On Demand repository), the document is not migrated.

- b. Click **Next**.

### 13. Licensing Plan

New OneDrive Migration Task

Start ✓  
Migration Options ✓  
Version Options ✓  
Attribute Options ✓  
Sensitivity labels ✓  
**Licensing Plan**  
Filter Items  
Notification  
Schedule  
Auto Re-run  
Reporting  
Summary

Pick the appropriate OneDrive for Business licensing plan. The following plans are available on the target tenant:

☒ Set license at the target

Select the licensing plan

**Tip:** To update the information on available licensing plans, re-run the discovery task.

Specify how selected licensing plan will be assigned to **target** accounts:

☒ Assign the plan to accounts without OneDrive for Business. Licensed users will retain the existing plans

☐ Assign the plan to all accounts. Licensed users will be switched to the selected plan

Step 5 of 11

Back Next Finish Cancel

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

- Click **Next**.

## 14. Filter Items

New OneDrive Migration Task

Start ✓  
Migration Options ✓  
Version Options ✓  
Attribute Options ✓  
Sensitivity labels ✓  
Licensing Plan ✓  
**Filter Items**  
Notification  
Schedule  
Auto Re-run  
Reporting  
Summary

☐ All Items  
☐ All Items that were added or modified since the last successful migration  
☒ Items to exclude  
☐ Items to include

Items are excluded if any of the following selected conditions are fulfilled:

Exclude specific folders (semicolon separated full paths)

Exclude specific file types (semicolon separated list)

Exclude files created

Exclude files modified

Exclude files bigger than (MB)

Step 6 of 11

Back Next Finish Cancel

### a. Set up filters as described below:

- **All items** - select this option to ignore filters. This is the default option and all OneDrive Content for the selected account will be migrated.
- **All items that were added or modified since the last successful migration** - select this option to migrate items that were added or modified in the source since the last successful migration. The migration service will check the **Last Successful Run** attribute and migrate every item added or modified in the source. If the OneDrive has not been successfully migrated before, all items will be migrated.
- **Items to exclude** - select this filter option to exclude files and folders from the migration. Then specify the filter criteria. Items are excluded if any of the following criteria are fulfilled:
  - **Exclude specific folders**- provide a semicolon-separated list of relative 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; doc; pdf
  - **Exclude files created**
    - select **Before** from the dropdown. Then click in the date field that appears to open the date picker and select a date. Files created before this date will not be migrated.
    - select **After** from the dropdown and then click in the date field that appears to open the date picker and select a date. Files created after this date will not be migrated.

- **Exclude files modified**
  - select **Before** from the dropdown. Then click in the date field that appears to open the date picker and select a date. Files modified before this date will not be migrated.
  - select **After** from the dropdown. Then click in the date field that appears to open the date picker and select a date. Files modified after this date will not be migrated.
- **Exclude files bigger than (MB)** - enter a numeric value. The maximum value is 1000 MB. Only integer values are supported.
- **Items to include** - select this filter option to include files and folders from the migration. Then specify at least one filter criteria. Items are included if any of the following criteria are fulfilled:
  - **Include specific folders**- provide a semicolon-separated list of relative paths to folders that you want to include. You can use slash or backslash. If it is convenient for you, use spaces after semicolons, e.g., filteredfolder; somefolder/subfolder
  - **Include 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
  - **Include files created**
    - select **Before** from the dropdown. Then click in the date field that appears to open the date picker and select a date. Files created before this date will be migrated.
    - select **After** from the dropdown. Then click in the date field that appears to open the date picker and select a date. Files created after this date will be migrated.
  - **Include files modified**
    - select **Before** from the dropdown. Then click in the date field that appears to open the date picker and select a date. Files modified before this date will be migrated.
    - select **After** from the dropdown. Then click in the date field that appears to open the date picker and select a date. Files modified after this date will be migrated.
  - **Include files bigger than (MB)** - enter a numeric value. The maximum value is 1000 MB. Only integer values are supported.

b. Click **Next**.

## 15. Notification

- a. **Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
  - **Only in a case of failure** - Select this option to send the email if the discovery task fails to complete successfully.
- b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
- c. Click **Next**.

## 16. 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** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
  - **Priority** - select a priority from the dropdown for the objects scheduled for migration with this task. Values are: **Highest**, **High**, **Medium**, **Low** and **Lowest**. The default priority is **Medium**. If the system is busy, the objects are queued (Migration state = Queued). When the system accepts new migration work, objects are taken from the queue based on the assigned priority and age in the queue.
- b. Click **Next**.

## 17. Auto rerun

- a. **Auto re-run task if target user(s) are missing any files or folders** - Select this option to rerun the migration task for files or folders that failed to migrate on the first run. The migration task will auto rerun 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 rerun task** option is selected in **Attribute Options**. Auto re-run is not available if an alternate target migration folder has been specified in the **Migration Options** step or item filters have been configured in **Filter Items** step.

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**.

## 18. Reporting

**Generate detailed report of migration errors** - select this option to generate a migration error report when you run the *OneDrive Migration Task*.

You can download the report from the **Reports** tab of the *Accounts and User Data* migration workspace by clicking the **Download** link in the **Error Log** column. If there are no migration errors, a download link is not available. Error reports are retained for 30 days. After 30 days the download link is replaced with the label **Expired** and you can no longer download the report. For more information about error reports, see [Reports](#).

## 19. Summary

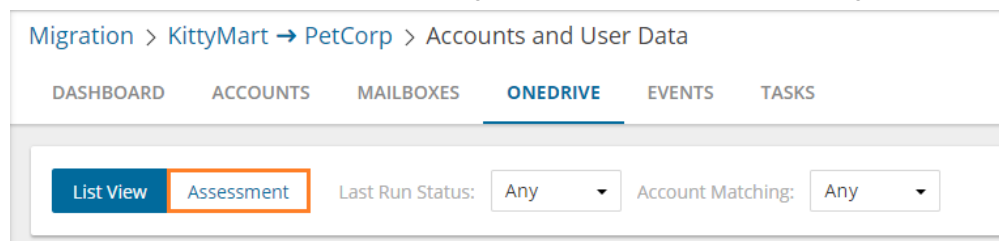
- a. **Save task settings as a migration template** - select this option to save the settings in this wizard as a reusable migration template.
  - **Migration Template Name** - specify a name for the template. If you have changed the settings of a preselected template, specify the same template name to apply the changes to the template when you complete the wizard.
- b. Verify the task specifications as described below:
  - **Name** - name of the task. You can specify a custom name. The default name is **OneDrive Migration Task**.
  - **Source tenant** - name of the tenant where the statistics will be collected.



- **Target tenant** - name of the target tenant in this project.
  - **Scheduled start** - date and time when the task will start. **Now** indicates that the task will start immediately.
  - **Priority** - the priority of this task.
  - **File migration** - migration action when a file is migrated.
  - **Versions to migrate** - options to migrate the version history.
  - **Account to display** - account name that will be displayed in the **Created by** and **Modified by** properties of migrated content:
  - **Alternative migration location** - default is the root folder or an alternate target migration folder
  - **Sharing permissions** - how sharing permissions will be transferred to the target users.
  - **Auto-rerun** - option to rerun the migration task for files or folders that failed to migrate on the first run.
  - **Sensitivity labels** - indicates how sensitivity labels should be processed. Valid settings are: *Do not process labels*, *Match and apply corresponding labels to documents migrated to the target*, and *Remove sensitivity labels from documents migrated to the target*.
  - **Reporting** - option to collect and retain data for report generation.
- c. Click **Back** to change configurations if necessary or click **Finish** to save and start the task as scheduled.

## Tracking the progress of the migration task

While the *OneDrive Migration Task* is running, click **Assessment** to track the progress of the migration task.



The following summary reports are available and described below.

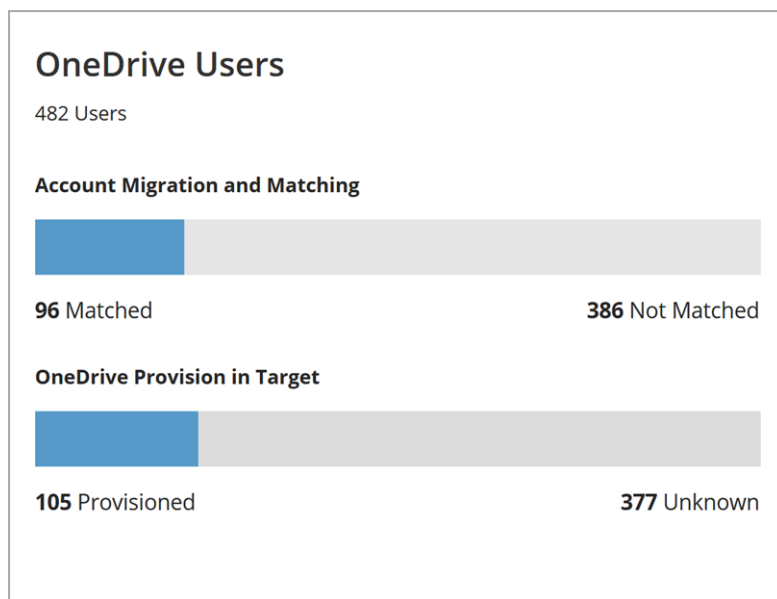
- [OneDrive Users](#)
- [Migration Progress](#) is updated in real time.
- [Migration Statistics](#)

## 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

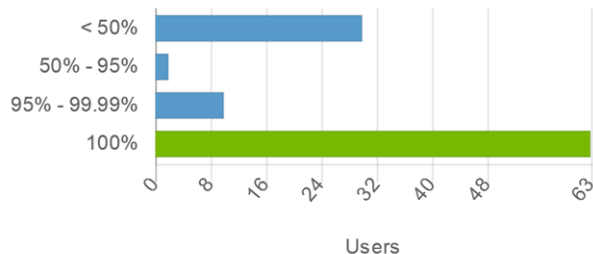
The migration progress pane reports on the status of the migration of OneDrive users. It is updated in real time.

Statistic	Description
Last Run Status	This data relates to the <b>Last Run Status</b> column on the <b>List View</b> tab. Show data from the last run status: new, in progress, completed, failed, stopped.
Progress of Started Users	<p><b>Started Users</b> = The users listed on the <b>List View</b> tab with <b>Migration Progress %</b> greater than zero.</p> <p>The bar chart shows the <b>Migration Progress %</b> for users. It shows how many users have <b>Migration Progress %</b> 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 <b>Migration Progress %</b> value of 100%.</p> <p>How is <b>Migration Progress %</b> 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 <b>Migration Progress %</b> is 10%.</p>
Average % for started users	This is the average <b>Migration Progress %</b> value for users on the <b>List View</b> .

## Migration Progress

Last Run Status: **387** New | **0** In Progress | **52** Completed | **0** Failed | **43** Stopped

### Progress of Started Users (Source/Target Items Ratio)



Average % for Started Users: 75.57 %

## 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.

## Migration Statistics

**Current Migrating Users** 5

**Scope:** Entire Project (Last 14 days)

### Total Migration File Size

Packaged 592.5 KB

Migrated 592.5 KB

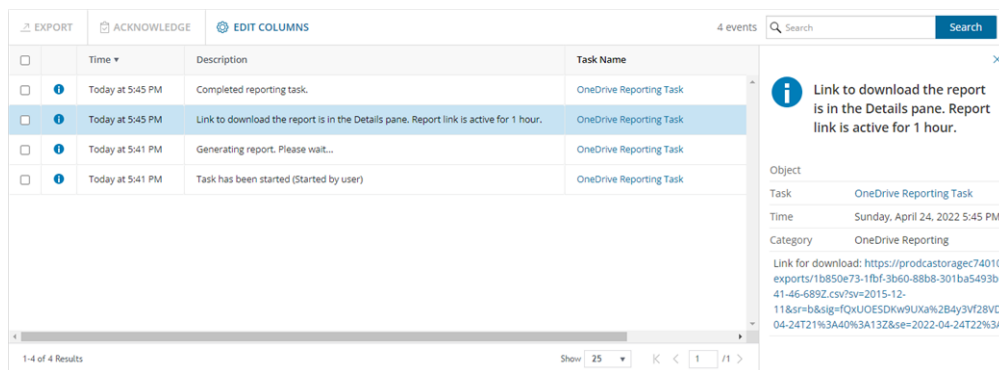
### Total Migration File Count

Packaged 58

Migrated 58

## Viewing the report

1. Open the **Tasks** tab.
2. Select the *OneDrive Reporting Task* (or your custom name) that you want to review.
3. In the task details pane that opens click **Events** (number).
4. Select the event with the description: Link to download the report is in the Details pane. Report link is active for 1 hour.
5. Click the report link in the details pane.



	Time	Description	Task Name
<input type="checkbox"/>	Today at 5:45 PM	Completed reporting task.	OneDrive Reporting Task
<input checked="" type="checkbox"/>	Today at 5:45 PM	Link to download the report is in the Details pane. Report link is active for 1 hour.	OneDrive Reporting Task
<input type="checkbox"/>	Today at 5:41 PM	Generating report. Please wait...	OneDrive Reporting Task
<input type="checkbox"/>	Today at 5:41 PM	Task has been started (Started by user)	OneDrive Reporting Task

Object

Task OneDrive Reporting Task

Time Sunday, April 24, 2022 5:45 PM

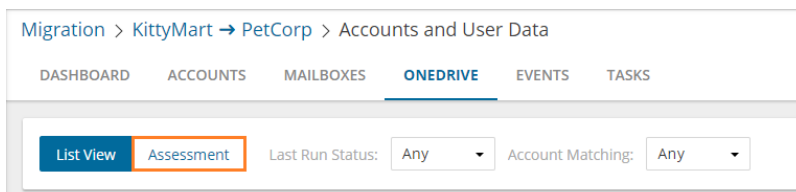
Category OneDrive Reporting

Link for download: <https://prodcastoragec74010exports/1b850e73-1fbf-3b60-88b8-301ba5493b141-46-689Z.csv?sv=2015-12-11&sr=b&sig=1QxUOESDKw9UXa%2B4y3Vf28VD04-24T21%3A40%3A13Z&se=2022-04-24T22%3A>

6. You can rerun the *OneDrive Reporting Task* after 1 hour to generate another report, and follow the same steps described here to view the report.

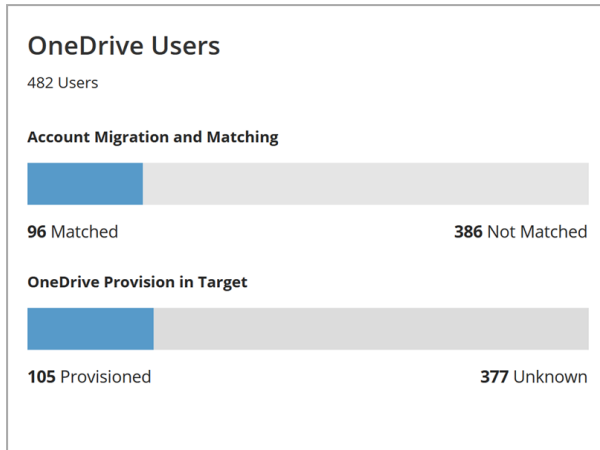
## Assessment

After you start a OneDrive migration, open the **Assessment** view to see the reports described below.



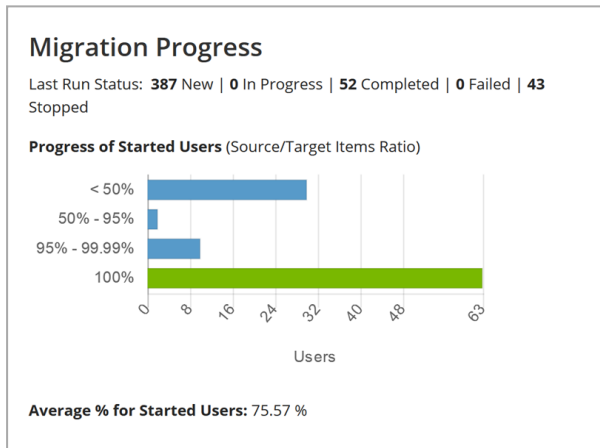
**NOTE:** Click the **Assessment** button again to refresh the reports during a migration.

- **OneDrive Users**



- Number of users
- Number of user accounts that are matched or unmatched
- Number of OneDrive accounts provisioned or not provisioned in the target tenant

- **Migration Progress**

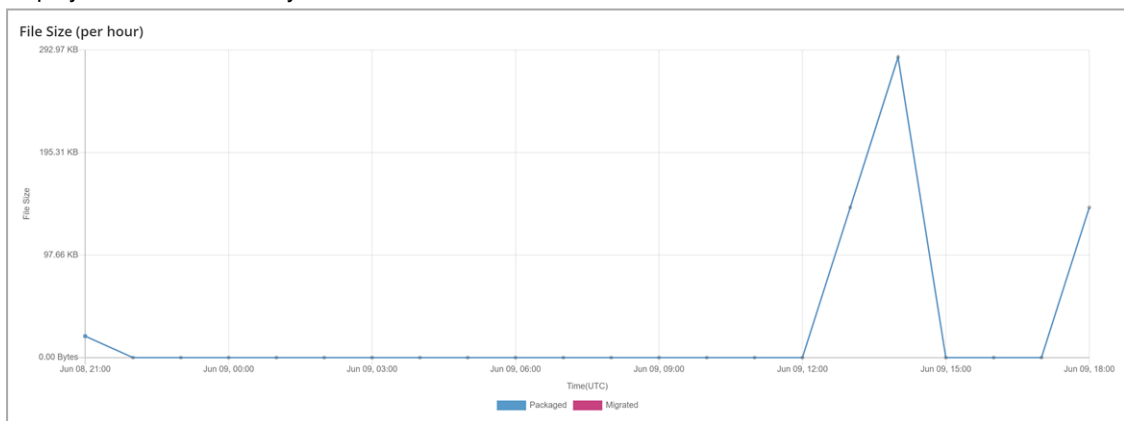


- Last Run Status - number of user accounts in state of the migration process
- Progress of Started Users (Source/Target Items Ratio)
- Average % for Started Users

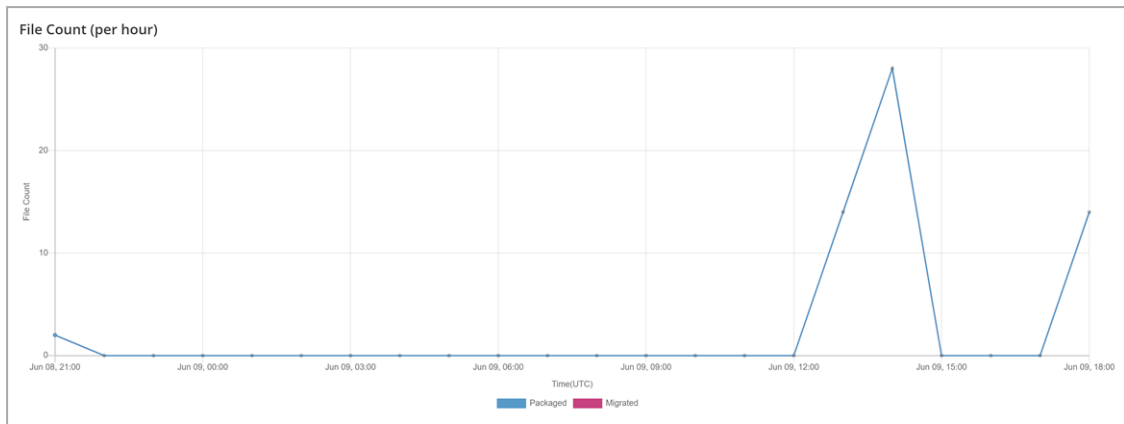
- **Migration Statistics**

Migration Statistics	
<b>Current Migrating Users</b>	5
<b>Scope:</b> Entire Project (Last 14 days)	
<b>Total Migration File Size</b>	
Packaged	592.5 KB
Migrated	592.5 KB
<b>Total Migration File Count</b>	
Packaged	58
Migrated	58

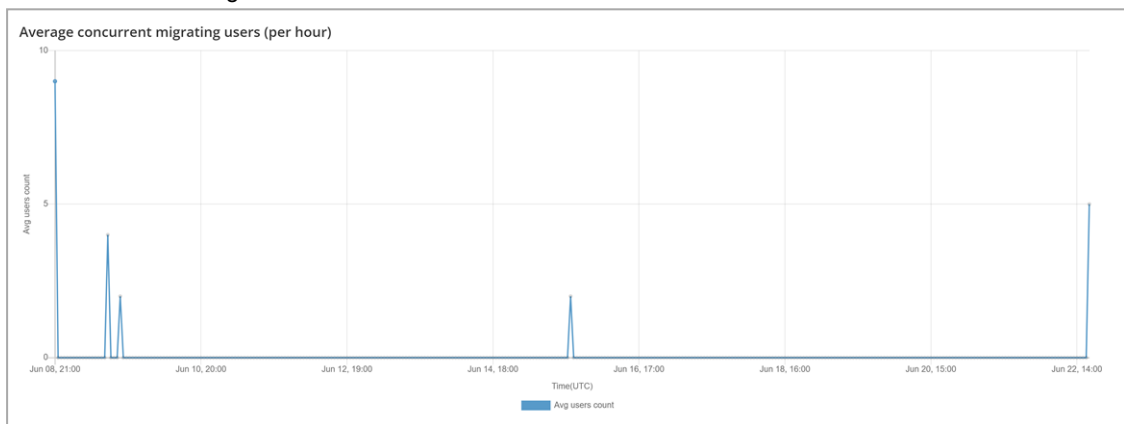
- Current Migrating Users - number of users that are currently migrating.
- Scope - indicates the performance of the migration within the last 14 days
- Total Migration File Size - total files size packaged or migrated within the last 14 days
  - Packaged - total file size submitted for migration
  - Migrated - total file size actually migrated
- Total Migration File Count - total files packaged or migrated within the last 14 days
  - Packaged - total number of files submitted for migration
  - Migrated - total number of files actually migrated
- **File Size (per hour)** - performance chart that indicates the file size packaged and migrated per hour. Data is displayed for the last 14 days.



- **File Count (per hour)** - performance chart that indicates the number of files packaged and migrated per hour. Data is displayed for the last 14 days.



- **Average concurrent migrating users (per hour)** - indicates the average number of users being concurrently migrated per hour. The optimization is managed seamlessly by the migration service to avoid bandwidth or throttling issues.



# Microsoft Teams Migration

On Demand Migration for Teams securely migrates Microsoft Teams and associated Microsoft 365 Groups across Microsoft 365 tenants. You can also use this dashboard for migration of content for Microsoft 365 Groups without Teams functionality. ([Content Migration for Microsoft 365 Groups](#)). 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)
2	<p>Grant necessary permissions in case these permissions are not already granted. See <a href="#">Prerequisites</a>.</p> <p><b>IMPORTANT:</b> It is not recommended to use existing user accounts as source and target temporary Migration Service 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 <a href="#">Finalizing the Migration</a>.</p>
3	<p><a href="#">Discover teams/groups on the source tenant</a></p> <p>On this step you can see names, suggested for target teams. In case you need some changes use manual mapping as described <a href="#">below</a>. There are no provision on the target on this step.</p> <p><b>TIP:</b> <a href="#">Organize teams in collections</a> to streamline the provision and migration process</p>
4	<a href="#">Export teams mapping to CSV file</a>
5	<p><a href="#">Map teams manually using exported CSV file</a></p> <p>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.</p>
6	<p><a href="#">Create Microsoft 365 Groups</a> and <a href="#">Provision teams</a> on the target tenant. Target teams will be owned by the target temporary Migration Service account that is used to perform the provisioning.</p> <ul style="list-style-type: none"> <li>The temporary Migration Service account in the source tenant will be added to all source teams as a member, and source private channels as an owner.</li> <li>The temporary Migration Service account in the target tenant will be added to all target teams and Microsoft 365 Groups as a member and an owner, and target private channels as an owner</li> </ul> <p>These accounts can be removed from teams as described in <a href="#">Finalizing the Migration</a>.</p>
7	<p><a href="#">Migrate teams</a></p> <p>Migrate / merge all conversations (including inline content) from the source to target channels.</p> <ul style="list-style-type: none"> <li>Target temporary Migration Service account will own all private channels migrated to the</li> </ul>



#	Step
	target.
8	<a href="#">remigrate</a> teams to incorporate supported changes made after the migration task (step 7) was started.
9	<a href="#">Monitor the progress and track issues</a>

## What We Migrate

Migration limitations indicated below may not be an exhaustive list of limitations as some may appear in unique customer migration scenarios, or arise due to platform or legacy support restrictions. In some cases, a solution to a limitation may already be on the product roadmap.

In this topic:

- [Objects and content types](#)
- [Migration from an Education tenant to an Education tenant](#)
- [Migration from a Commercial tenant to a GCC High tenant](#)

### Objects and content types

Object	Support	Notes
Adaptive Cards	✗	
Announcements	partial	Customized background picture for announcements cannot be migrated
Applications	partial	Only Word, Excel, PowerPoint, OneNote and List tab applications linked to files in the same channel are supported. If you rename a tab in the source team and then re-migrate, the renamed tab will be migrated. The target will then have two tabs, one with the old name and one with the new name. Whiteboard tabs are migrated if the Whiteboard files, in the OneDrive of the Whiteboard creator, is pre-migrated to the target tenant. At least one team owner must have permission to the whiteboard file in source tenant. Whiteboard tabs will be migrated as Weblink tabs in target.
Applications including Shifts for schedule management	✗	
Archived team	✓	Archived teams will first be migrated to the target tenant as active teams. Then they will be archived in the target tenant. Archived team can only be migrated once and remigrating archived teams is not supported.
Attached images, media files, documents	partial	Preview icons cannot be migrated.
Authorship	partial	Authorship in messages is migrated as a string with author name

Object	Support	Notes
		and creation date. File authorship is supported.
Bots	✗	Bot messages in channel conversation can be migrated.
Calls and devices	✗	Contacts, contact groups, call history, voicemail, and custom setup cannot be migrated. Devices and device setup cannot be migrated.
Chats	✓	<p>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. File links in team chats will not work after chat migration if the files are moved to another folder in the source tenant.</p> <p>Files that are linked to the private chats and meetings are migrated but do not display in the Files tab of private chats and meetings. In the source tenant a member removed from a chat can still see the history of the chat in the source. In the target tenant, members cannot see the history of chats they have been removed from.</p> <p>Users deleted on the tenant cannot be migrated, so do not appear as members of a chat on the target. Deleted users remain visible as members of a chat on the source. One-to-one chats, where one of the users is deleted, are migrated for the user that is still a member of the tenant.</p> <p>If external users are added to target chats during migration, the external users cannot access the Archived chat file since no permissions are granted to the external users.</p> <p>If a domain move is done after a chat migration, the Conversation History links in migrated chats will not work because the URL of those tabs remain mapped to the original target domain.</p> <p>Private one-to-one chats are migrated as group chats. All the messages in the migrated chats are posted by the temporary Migration Service.</p> <p>Private one-to-one chats with a Skype user cannot be migrated. The Microsoft Graph API List chat messages do not support querying messages of that type.</p> <p>Private one-to-one chats initiated by an external user (user from another tenant) cannot be migrated. Private one-to-one chats not initiated by an external user are migrated, and in the title the external user's real name is replaced with the text "External user".</p> <p>Bot messages will not be migrated.</p> <p>Loop components in chats cannot be migrated.</p> <p>Emoji is not supported when archiving chats.</p> <p>Errors in chat migration will not be linked to a particular user since chat always happens among multiple users. As a result, those errors will not be visible in Exported Error Logs since the logs are exported per user.</p> <p><b>Chat application tabs</b> cannot be migrated.</p>

Object	Support	Notes
Code snippets	✗	
Conversations	✓	<p>The target tenant's temporary Migration Service account is displayed as the owner of all migrated messages on the target: The original owner and creation time of a message are displayed in the first line of the message starting with "Originally posted by...".</p> <p>Individual messages larger than 4 MB will not migrate. Messages containing several inline messages can exceed 4MB. The chat will migrate without the large messages. An error will display in the On Demand Migration for Teams Events tab of the form: Request failed with RequestEntityTooLarge status code (Request Entity Too Large).</p>
Custom tags for teams	✓	GCC tenants do not support tags.
Custom website tab	✓	
E-mail attachments	✗	
Emoji, GIF, Sticker, Praise, memes	✓	Emoji in messages are supported but reaction emojis are not supported.
File preview	partial	Preview icons of files attached to a post cannot be migrated. The file is migrated as a link.
Formatted text	✓	
Guest accounts and conversations	✓	
Images posted inline from buffer	✓	
Inbox folder and Calendar from the group mailbox associated with a team	✓	
Link preview of public images	✓	Preview icons cannot be migrated. Only the link is migrated.
Link preview of public sites	partial	Preview icons cannot be migrated. Only the link is migrated.
Lists	partial	Lists must be created in the same SharePoint site used by the team or Private Channel. You must select the <i>Standard and Customized (All SharePoint Content)</i> option in the <i>Migration Options</i> step of the <i>New Teams Migration Task</i> to allow the migration of Lists and their content.
Meeting conversations	✓	Conversations are migrated as private chats, but cannot be inserted into the original Teams meeting. Conversations in a channel stay in the channel rather than a private chat, and are migrated to the target channel with a Teams migration task.
Meeting Notes in private meetings	✗	
Meeting recordings	partial	Recordings of scheduled meetings in a team channel, stored in SharePoint or OneDrive, are migrated.

Object	Support	Notes
		<ul style="list-style-type: none"> <li>Meeting recordings stored in Microsoft Stream (Classic) cannot be migrated; the link to the recording on the source team channel is retained.</li> <li>On Demand does not support meeting recordings in a group chat. Recordings in group chats 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.</li> <li>On Demand does not support meeting recordings for "Meet now" meetings.</li> </ul>
@mentions: <ul style="list-style-type: none"> <li>Users (includes @Everyone)</li> <li>Channels</li> <li>Teams</li> </ul>	✓	All @mentions from the source will be created as plain text with blue color in the target tenant to avoid notification to end users during migration.
OneNote	partial	<p>OneNote files will be migrated during file migration but the OneNote tabs will not be created in the target channels due a limitation of the Microsoft API. When migrating to a new team, default notebook tabs in target channels will be linked to the migrated OneNote files since the tabs are created automatically during teams creation in the target tenant.</p> <p>If teams are renamed during migration, the default notebook in the source tenant will be migrated as source team name instead of the renamed target team name. As a result, the Note content will not show up in the target team channel and the notebook link in the SharePoint quick launch does not open the Note content.</p>
OneDrive Shared Library	partial	OneDrive Shared Library must be created and associated with a team in the same SharePoint site. You must select the <i>Standard and Customized (All SharePoint Content)</i> option in the <i>Migration Options</i> step of the <i>New Teams Migration Task</i> to allow the migration of OneDrive Shared Library and its content.
OneDrive Sharing Links	partial	Only shared links that were activated by the users or group members (the user or group member clicked on the link to access the file or folder) in the source tenant will be migrated and converted to direct permissions. Users or group members who did not activate a shared link in the source tenant will not get the direct permissions in the target tenant and must re-request permissions from the owner when they access the file or folder in the target tenant. Use the <b>Convert Sharing Links permissions to direct permissions</b> option in the Attribute Options step of the <i>New OneDrive Migration Task</i> to migrate sharing links.
Planner	partial	Premium Planner and Planner Tab are not migrated. Buckets,

Object	Support	Notes
		<p>Planner Tasks and Comments are migrated. When migrating Planner Tasks, assignees in target tasks will receive a notification after migration.</p> <p>The author of auto-generated comments like 'New task ... created' in migrated tasks will always show as the login user. This is a limitation of Microsoft Graph API when creating tasks in the target tenant with application permission.</p> <p>Premium Planner plans are not supported due to a limitation of Microsoft Graph API.</p>
Private channels	✓	See <b>Channel settings</b> subsection below.
Reaction Emoji	✗	
Rich card attachments	✗	
Self-Chat	✗	
Shared channels	✓	See <b>Channel settings</b> subsection below.
SharePoint document libraries (Files)	✓	Sensitivity labels applied to SharePoint files can be migrated.
Standard channels	✓	See <b>Channel settings</b> subsection below.
Team owners and team members	✓	<p>Only for Microsoft 365 Groups that are migrated / matched. Teams and groups with dynamic membership can be migrated but cannot be merged.</p> <p>The memberships is not updated in Teams immediately after membership migration. It takes a while before Microsoft synchronizes memberships between groups and Teams.</p> <p><b>Workaround:</b> Wait for membership synchronization.</p>
Team picture	✓	
Team settings	partial	<p>Target team settings cannot be updated if you re-run the provisioning task.</p> <p><b>Allow members to upload custom apps and Team code</b> settings cannot be migrated.</p>
Timestamps	✓	
Wiki sections and pages	✗	
<b>Files uploaded from mobile application</b>		
Media files	✓	
Voice recordings	✗	
Documents	✓	
<b>Channels and Channel Settings</b>		
General settings	✓	<p>Channel <i>isFavoriteByDefault</i> property migration is not supported.</p> <p><b>Workaround:</b> Enable <b>Automatically show this channel in everyone's channel list</b> option for the channel manually in your</p>

Object	Support	Notes
		Teams client.
Standard channels	✓	
Private channels	✓	The Teams client will not display the updates immediately. It may take up to 24 hours before the changes are reflected due to Microsoft limitations. Private channel members not visible in the Teams application unless you explicitly search for a member.
Shared channel	✓	Shared Channels can only be provisioned in the original team where the channel was created. Shared Channel membership is not migrated.
<b>Group Settings</b>		
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	✓	General
<b>Others</b>		
Microsoft public preview	✗	In general, Microsoft public preview features cannot be migrated. These features may also take additional time to be fully developed and tested before being released to production.
M365 security and compliance features for Teams <ul style="list-style-type: none"> <li>Legal Hold</li> <li>Retention Labels</li> <li>Microsoft Information Protection policies and labels</li> <li>M365 Compliance Customer Lockbox</li> </ul>	✗	
Power Platform features for Teams <ul style="list-style-type: none"> <li>Power Apps</li> <li>Power Pages</li> <li>Power Automate (Flow)</li> <li>Power Virtual Agents</li> </ul>	✗	

## Migration from an Education tenant to an Education tenant

Teams migration from one education tenant (Microsoft 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

## Limitations

- When provisioning Public Education teams, the visibility of the teams will change due to limitations of the Microsoft Teams for Education Templates:
  - Class Team: changes from Public to HiddenMembership.
  - PLC and Staff: changes from Public to Private.
- 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 cannot be migrated in case these links point to files located outside the default SharePoint URL. These links are missing in the target.

All other Education content is not supported for migration.

## Migration from a Commercial or GCC tenant to a GCC High tenant

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

Content type	Availability in GCC High tenant	Migration support
Announcements	✓	✓
Applications	✓	✓
Applications including shifts for schedule management	✓	✗
Associated SharePoint document libraries (files)	✓	✓
Attached images, media files, documents	✓	✓
Authorship	✓	✓
Bots	✗	✗
Calendars	✓	✗
Chats	✓	✓
Code snippets	✓	✗
Conversations	✓	✓
Custom tags for teams	✗	✗
Custom website tab	✓	✓
Email attachments	✓	✗
Emoji, Teams GIFs, memes	✓	✓
Formatted text	✓	✓

Content type	Availability in GCC High tenant	Migration support
Group mailbox associated with team	✓	✗
Guest accounts and conversations	✓	✓
Images posted inline from buffer	✓	✓
Link preview of public images	✓	Partial. Icon is not migrated.
Link preview of public sites	✓	Partial. Icon is not migrated.
Meeting conversations	✓	✓
Mentions <ul style="list-style-type: none"> <li>• Users</li> <li>• Channels</li> <li>• Teams</li> </ul>	✓	✓
OneNote	✓	✗
Planner (Planner Tab, Buckets, Tasks and Comments)	✓	✓
Private channels	✓	✓
Public channels	✓	✓
Team owners and team members (Creation of Microsoft 365 Groups)	✓	✓
Team picture	✓	✓
Timestamps	✓	✓
Wiki sections and pages	✓	✗
<b>i</b> <b>NOTE:</b> Starting January 2024, neither Wiki tabs nor the Wiki app will be accessible through Teams. Users will no longer have the ability to export their wikis. However, users will still be able to download their wiki files from SharePoint. For more information, see <a href="https://support.microsoft.com/en-us/office/export-a-wiki-to-a-onenote-notebook-in-microsoft-teams-8cd8ab0c-2314-42b0-a1d0-5c6c4c5e1547">https://support.microsoft.com/en-us/office/export-a-wiki-to-a-onenote-notebook-in-microsoft-teams-8cd8ab0c-2314-42b0-a1d0-5c6c4c5e1547</a>		

## 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!**

The following consents must be granted to the tenants before Teams migration can be started



- **Migration - Basic**
- **Migration - Mailbox Migration**
- **Migration - SharePoint - Minimal** for the source tenant, and **Migration - SharePoint - Full** for the source and target tenants. **Migration - SharePoint** is a legacy permission set and should be replaced with either the Minimal or Full permission sets.
- **Migration - Teams - Minimal** for the source tenant, and **Migration - Teams - Full** for the source and target tenants. **Migration - Teams** is a legacy permission set and should be replaced with either the Minimal or Full permission sets.

**i TIP:** If the 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.

**i IMPORTANT:** The Tenant Administrator must open the OneNote application just once in the target tenant. It does not have to be opened or run by every user. If OneNote is not initialized before granting consent for Teams migration, the following error occurs: Unexpected response while attempting to register the tenant: AADSTSxxxxxx: The app needs access to a service ("https://\*.onenote.com/")

- Accounts must be matched or migrated before migrating teams.
- 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.

## Required permissions

See the [On Demand Migration - Permissions Reference Guide](#) for details.

## Temporary Migration Service accounts

- It is recommended to create or use source and target temporary Migration Service accounts.
- The temporary Migration Service accounts should be granted the **Global Administrator** or **Teams Administrator** role on the tenants for which these account are used. The temporary Migration Service accounts in the source and target tenant should have Teams license from the [Microsoft 365 admin center](#).
- Do not change your temporary Migration Service accounts before completing the migration project.
- You must remove the source and target temporary Migration Service accounts for safety reasons after the migration is completed. These accounts can be removed from teams as described in [Finalizing the Migration](#).

The target temporary Migration Service account is used in (but not limited to) the following scenarios:

- It creates and owns the provisioned target teams.
- It 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.
- It is used to perform the Teams migration and is displayed as the owner of all migrated conversation and chat messages and planner tasks on the target.

- It 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 temporary Migration Service account are hidden when the chat migration is complete.

# Teams Migration Workspace

In this topic:

- [Dashboard](#)
- [Teams](#)
- [Team Content](#)
- [Chats](#)
- [Configuring the project](#)

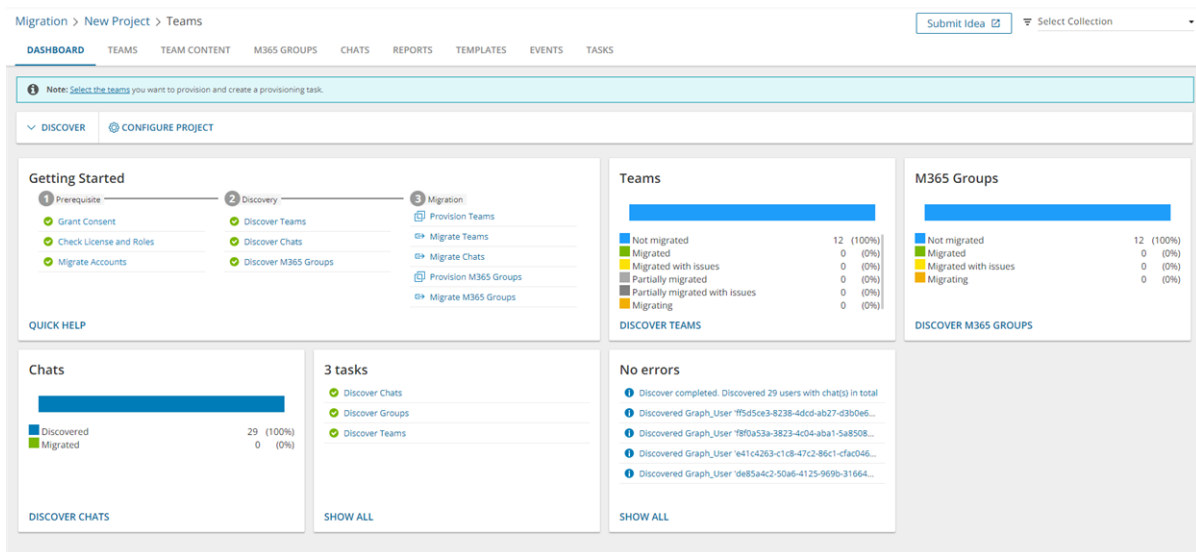


**NOTE:** The *Teams* migration workspace is common for the Teams, M365 Groups and Chats migration services. See [Migrating Groups](#) for details about M365 Groups.

## Dashboard



**NOTE:** If the **Teams** license check fails, verify that the source and target tenants are valid. Then run the PowerShell commands in Quest KB article [337302](#) to confirm that the tenant administrator account used to grant consent has **TeamspaceAPI** activated.



The components of the dashboard are as described below:

**Notification panel** - presents relevant information and shortcuts to migration activities. The notification panel is displayed across all tabs.

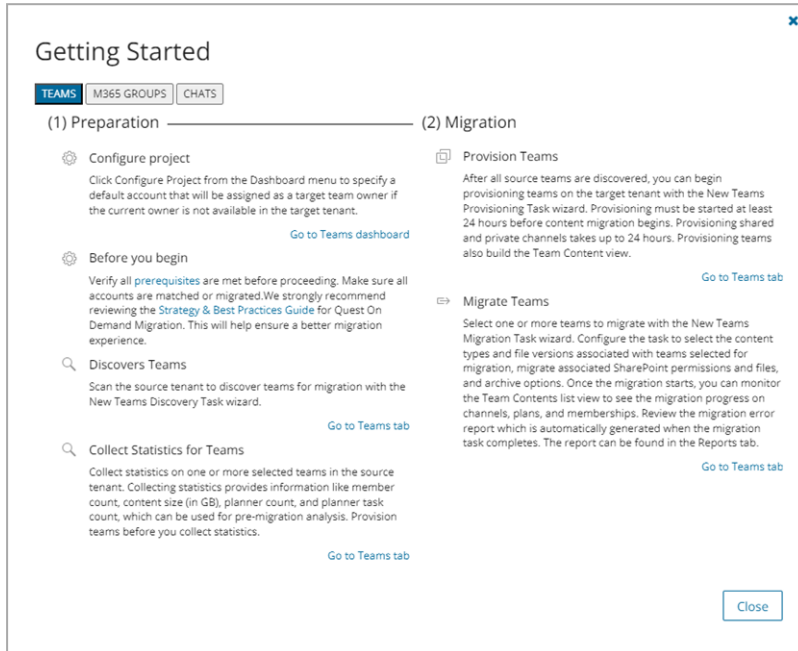
**Dashboard Menu** - contains the following links to common activities in the migration process.

- **Discover** - starts the *New Teams & Groups Discovery Task* wizard to collect information about accounts in the source tenant. For more information see [Discovering Teams and Groups](#).

- **Configure Project** - starts the *Edit Project* wizard for Teams. You can specify default settings as described in the [Configuring the project](#) section.

## Dashboard Tiles

- **Getting Started** - displays a summary of the various actions for preparing and migrating teams. Click **Quick Help** to open the Quick Help dialog. Then click the **Teams** tab to see help topics related to Teams, or click the **Groups** or **Chats** tab to see help topics related to Groups or Chats respectively.



- **Teams** - displays a summary of the teams in various migration states. Click **Show All** to open the *Teams List view* to inspect the teams.
- **M365 Groups** - displays a summary of the M365 Groups in various migration states. Click **Show All** to open the *Groups List view* to inspect the groups.
- **Chats** - displays a summary of chats in various migration states.
- **Tasks** - displays the five most recent tasks that were completed in the Teams migration 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 Teams migration workspace. The title displays the total number of events. Click **Show All** to open the *Events List view*.

# Teams

Team Name	Migration State	SharePoint	Channels	Members	Source File	Target File	Messages	Migrated	Plans	Migrated	Tasks	Migrated
Communications	Discovered	-	2	9	1	-	10	-	0	-	0	-
Contoso	Exists in target	-	1	28	1	-	0	-	0	-	0	-
Contoso marketing	Discovered	-	1	19	1	-	1	-	0	-	0	-
Design	Migrated with L...	Standard	3	15	1	-	28	21	0	-	0	-
Digital Initiative Public Relations	Discovered	-	1	19	1	-	0	-	0	-	0	-
Mark & Project Team	Migrating	Customized	6	18	1	-	90	-	4	4	42	42
Remote living	Exists in target	-	2	19	1	-	12	-	0	-	0	-
Retail	Migrating	Customized	2	18	1	-	13	7	0	-	0	-
Sales and Marketing	Discovered	-	2	19	1	-	11	-	1	-	14	-
SOC Team	Discovered	-	1	5	1	-	0	-	0	-	0	-
U.S. Sales	Discovered	-	3	6	1	-	4	-	0	-	0	-

The Teams List View is comprised of the following components:

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

**Filter panel** - consists of predefined filters for the Teams List view and tabs to switch between the Teams List view and the Assessment view. See [Filtering](#) for more information about working with filters. The predefined filters are:

- **Teams** - returns a list of teams based on the migration state of the team.
- **Teams By Size** - returns a list of teams based on the size of a team. Valid ranges are *More than 1GB*, *100MB - 1GB*, *10MB - 100MB*, *Less than 10MB*. The dropdown also shows the number of teams in the list for each range.
- **SharePoint** - returns a list of teams based on the nature of the SharePoint site linked to the team. Valid values are *Customized* and *Standard*.

**List View Actions Menu** - contains links to teams migration activities and the search box. Each action is explained in greater detail in subsequent topics. See [Searching](#) for more information about working with the search box.

**List View** - displays information about teams in the source and target tenants. Use the **Edit Columns** to show or hide columns in the list. The columns are as described below:

- **Team Name** - name of the team in the source tenant.
- **Migration State** - status of the task in the migration process. Values are as listed below:
  - **Discovered** - team discovered in the source tenant.
  - **Exists in target** - team in the source tenant exists in the target tenant.
  - **Provisioning** - started provisioning team in the target tenant.
  - **Provisioned** - team provisioned successfully in the target tenant.
  - **Provisioned with issues** - Team provisioned in the target tenant but there were issues during provisioning.
  - **Provision failed** - started provisioning team in the target tenant.

- **Queued** - team is waiting for migration service resources to be available. For more information, see [How Queuing Works](#).
- **Migrating** - team migration in progress.
- **Partially migrated** - team migration completed but some components were not migrated.
- **Partially migrated with issues** - team migration completed some components were not migrated and due to issues during migration.
- **Migrated** - team migrated successfully to the target tenant.
- **Migrated with issues** - team migration completed but there were issues during migration.
- **Migration failed** - team could not be migrated.
- **SharePoint** - nature of the SharePoint site linked to the team. Values are as described below:
  - `<no-value>` - SharePoint content has not be discovered yet.
  - `Standard` - there is at most 1 SharePoint site and 4 Lists in the SharePoint site collection
  - `Customized` - there are more than 1 site and 4 Lists in the SharePoint site collection



**NOTE:** The SharePoint status is available only after the *New Teams Provisioning Task* is run.

- **Channels** - total number of channels in the source tenant team.
- **Source Members** - total number of members in the source tenant team.
- **Target Members** - total number of members in the target tenant team.
- **Source Files (GB)** - total size in GB of files across all public channels in the source tenant.
- **Target Files (GB)** - total size in GB of files across all public channels in the target tenant.
- **Source Messages** - total number of messages in the source tenant team.
- **Migrated Messages** - number of messages migrated to the target tenant team.
- **Target Messages** - total number of messages in the target tenant team.
- **Source Plans** - total number of plans in the source tenant team.
- **Migrated Plans** - number of plans migrated to the target tenant team.
- **Target Plans** - total number of plans in the target tenant team.
- **Source Tasks** - total number of tasks in the source tenant team.
- **Migrated Tasks** - number of tasks migrated to the target tenant team.
- **Target Tasks** - total number of tasks in the target tenant team.
- **Source SharePoint site Url** - SharePoint site URL of the source team. Available when the team is provisioned in the target tenant.
- **Target SharePoint site Url** - SharePoint site URL of the target team. Available when the team is provisioned in the target tenant.
- **Mapped to Different SharePoint site Url** - indicates whether or not the team's SharePoint site is mapped to a different url in the target tenant.
- **Progress (%)** - migration progress indicated as a percentage.
- **Last Activity** - date and time of the last action performed on the team record.
- **Created** - date and time the team record was created.

- **Last Statistics Collected Date** - date and time when the most recent statistics were collected.
- **Target Team Name** - name of the team in the target tenant.
- **Source MailNickname** - email alias of the associated Microsoft 365 Group in the source tenant.
- **Target MailNickname** - email alias of the associated Microsoft 365 Group in the target tenant. Available when the team is provisioned in the target tenant.
- **IsArchived** - indicates whether the team is archived. Archived teams can be migrated like any other team.
- **Collections** - indicates the most recent collection where the corresponding Team is added and the number of additional collections that also contain this object.
- **Source Team URL** - URL of the source team.
- **Target Team URL** - URL of the target team. Available when the team is provisioned in the target tenant.
- **Source Group ID** - unique identifier of the team or group in the source tenant.
- **Target Group ID** - unique identifier of the team or group in the target tenant. Available when the team is provisioned in the target tenant.
- **Source SMTP Address** - SMTP address of the Office 365 group of the source team.
- **Target SMTP Address** - SMTP address of the Office 365 group of the source team. Available when the team is provisioned in the target tenant.
- **Source Team Owner UPNs** - User Principal Names of the source team owners. Up to 5 names are listed.
- **Target Teams Owner UPNs** - User Principal Names of the target team owners. Up to 5 names are listed. Available when the team is provisioned in the target tenant.

### Teams Assessment View

See the [Premigration Assessment for Teams](#) for the complete list of available reports.

### Team Details

When you select a team from the List View, the Team Detail pane opens. The information in the pane is described below:

- **Description** - name of the team in the source tenant.
- **Visibility** - indicates whether the source tenant team is *Public* or *Private*.
- **Is Archived** - indicates whether the source tenant team is archived.
- **SharePoint Customized** - status of the selected account. Valid values are New, In Progress, Failed and Completed.
- **Source Location** - geo location of the source team. The geo location could be blank if your source tenant team is not geo-located.
- **Source Url** - SharePoint site URL of the source team. Available when the team is provisioned in the target tenant.
- **Target Location** - geo location of the target team. This value appears when the team is provisioned and will reflect the preferred location specified in the *New Teams Provisioning Task* wizard. The geo location could be blank if your target tenant team is not geo-located.
- **Target Url** - SharePoint site URL of the target team. Available when the team is provisioned in the target tenant.
- **Owner count** - number of owners of the source team. A team can have up to 100 owners.
- **Member count** - number of members in the source tenant team.

- **Migrated messages count** - number of messages migrated to the target tenant team.
- **Archive messages count** - number of archived messages in the source tenant team.
- **Last Operation** - the most recent operation performed on the team. Valid values are *Discovered*, *Provisioned*, and *Migrated*.
- **Events** - count of the events that occurred during one or more tasks.
- **Tasks** - list of tasks invoked for the selected team.

## Team Content

The Team Content tab presents a list of teams and its components along with the count of child items of the object type. When you open the Team Content tab, the list view initially displays all the teams and their migration state along with the total count of the team components of each team: Channel, Planner, Mailbox, Team membership, SharePoint Content\* and SharePoint Site\*. For each team component you can additionally view its components and their child item counts as well.

DASHBOARD TEAMS **TEAM CONTENT** M365 GROUPS CHATS REPORTS TEMPLATES EVENTS TASKS

Status: Any Type: Any Parent: FEV-EU\_BD\_Innovation x

EDIT COLUMNS 10 teams Search Search

Type	Name	Migration State	Items To Migrate	Processed	Progress(%)
Channel	daily sessions	Migrated	0	1	100
SharePoint List	Documents - daily sessions FEV-EU_BD_Innovation	Migrated	1	1	100
SharePoint List	Documents - FEV-EU_BD_Innovation	Migrated	4	4	100
SharePoint List	Documents - Rules FEV-EU_BD_Innovation	Migrated	2	2	100
Mailbox	FEV-EU_BD_Innovation Mailbox	Migrated with issues	1	0	0
Membership	FEV-EU_BD_Innovation Membership	Migrated with issues	3	0	0
Planner	FEV-EU_BD_Innovation Planner	Migrated	0	0	100
Channel	Rules	Migrated	2	2	100
Channel	General	Migrated	1	1	100
Channel	Sasseoir et de répondre à tout ce qui à démarrer	Migrated	1	1	100

1-10 of 10 Results Show 25 1 / 1

\* **Example:** Consider a team with multiple private channels A and B.

If you select the **SharePoint Standard** option in the *New Teams Migration Task* wizard, then the following items are displayed in the **Team Content** view with type "SharePoint List" after migration.

Type	Name
SharePoint List	Documents - <i>team site name</i>
SharePoint List	Documents - <i>private channel A site name</i>
SharePoint List	Documents - <i>private channel B site name</i>

If you select the **SharePoint Standard and Customized** option in the *New Teams Migration Task* wizard, then the following items are displayed in Team Content view with type "SharePoint Site" after migration.

Type	Name
SharePoint Site	Site - <i>team site name</i>

Type	Name
SharePoint Site	Site - <i>private channel A site name</i>
SharePoint Site	Site - <i>private channel B site name</i>

#### To display the contents of a specific team:

1. Select the team to open the details pane on the right hand side.
2. Click **Show Content**. The components of the selected team are displayed in the list view along with the migration state and child item counts for each component. In the details pane, the **Show Parent** link is activated and the **Show Content** link is deactivated.

**NOTE:** Components of a team can be displayed when teams are migrated through a new project created after the Jan 10, 2023 release.

The screenshot shows the Quest On Demand interface. The left sidebar contains navigation options like 'My Dashboard', 'Tenants', 'Migration', 'License Management', 'Quadtrotech Nova', 'Access Control', 'Settings', 'Services', 'Help', and 'Release Notes'. The main area is titled 'Migration > Migration Test Org > Teams'. Below this, there are tabs for 'DASHBOARD', 'TEAMS', 'M365 GROUPS', 'CHATS', 'REPORTS', 'TEMPLATES', 'EVENTS', and 'TASKS'. The 'TEAMS' tab is active, and the 'TEAM CONTENT' sub-tab is selected. A filter bar shows 'Status: Any', 'Type: Any', and 'Parent: Design'. Below this is a table with columns: Type, Name, Migration State, Items To Migrate, Processed, and Progress(%). The table lists several components, including 'Design Membership' which is highlighted. To the right of the table is a details pane for 'Design Membership' showing links for 'SHOW PARENT' and 'SHOW CONTENT', along with a description, visibility, last operation, and events.

#### To display the parent of a specific team component:

1. Select the team component to open the details pane on the right had side.
2. Click **Show Parent**. The parent team is displayed in the list view along with the migration state and the total count of the team components. In the details pane, the **Show Content** link is activated and the **Show Parent** link is deactivated.

The components of teams are migrated when you start a migration task with the *New Teams Migration Task* wizard and select the team component types to migrate.

**NOTE:** The **Events** property value in the detail pane for a selected child component will be zero.

**Filter panel** - consists of predefined filters for the Teams List view and tabs to switch between the Teams List view and the Assessment view. See [Filtering](#) for more information about working with filters. The predefined filters are:

- **Status** - migration state of the team.
- **Type** - object type: Team, Channel, Planner, Mailbox, team membership or SharePoint Content.



**List View** - displays information about teams in the source and target tenants. Use the **Edit Columns** List View Actions Menu to show or hide columns in the list. The columns are as described below:

- **Type** - object type: Team, Channel, Planner, Mailbox, membership or SharePoint Content.
- **Name** - name of the object
- **Migration State** - status of the task in the migration process. Values are as listed below:
  - Discovered
  - Exists in target - object in the source tenant exists in the target tenant
  - Mapped
  - Provisioning
  - Provisioned
  - Provision failed
  - Migrating
  - Partially migrated
  - Partially migrated with issues
  - Migrated
  - Migrated with issues
  - Migration failed
- **Items to migrate** - the count of child items of the object. For each team, the count indicates the total number of child components of the team. For each team components the item counts displayed are as described below:
  - Planner: number of Planner tasks
  - Channel: number of messages
  - Mailbox: the team mailbox. The count is always 1
  - Membership: number of team members
  - SharePoint Content: number of sites
- **Processed** - the number of items considered for migration.
- **Progress (%)** - migration progress in percentage. If a team component is not selected for migration in the *New Teams Migration Task* wizard, this value does not exist for the component.

## Chats

The Chats List View displays **Chats** between one or more matched users between a source and target tenant.

User Name	Migration State	Workflow	ODM Licensed	OneDrive Status	Mailbox Status	Migrated Chats	Archived Chats	Source UPN
Alex Wilber	Migrated		No	New	Discovered	2	No	AlexW@M365x84007354.OnMicro...
Allan Deyoung	Migrated		No	New	Discovered	0	No	AllanD@M365x84007354.OnMicro...
Diego Siciliani	Migrated		No	New	Discovered	2	No	DiegoS@M365x84007354.OnMicro...
Isalah Langer	Partially migra...		No	New	Discovered	2	No	IsalahL@M365x84007354.OnMicro...
Johanna Lorenz	Partially migra...		No	New	Discovered	4	No	JohannaL@M365x84007354.OnMicro...
Joni Sherman	Partially migra...		No	New	Discovered	3	No	JoniS@M365x84007354.OnMicro...
Lee Gu	Partially migra...		No	New	Discovered	1	No	LeeG@M365x84007354.OnMicro...
Lynne Robbins	Partially migra...		No	New	Discovered	4	No	LynneR@M365x84007354.OnMicro...
Megan Bowen	Migrated		No	New	Discovered	16	No	MeganB@M365x84007354.OnMicro...
Microsoft Service Account	Discovered		No	New	Discovered	-	No	ms-serviceaccount@M365x84007...
MOD Administrator	Discovered		No	New	Discovered	-	No	admin@M365x84007354.onmicro...

The Chats List View is comprised of the following components:

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

**Filter panel** - consists of predefined filters for the Chats List view . See [Filtering](#) for more information about working with filters. The predefined filters are:

- **Chats** - returns a list of chats based on the migration state of the team.
- **ODM Licensed** - returns a list of user account with ODM license status. Values are *Yes* and *No*.
- **Account Type** - returns a list of user accounts based on their mailbox type. Values are *Mailbox-Enabled User* and *Non-Mail-Enabled User*.

**List View Actions Menu** - contains links to chat migration activities and the search box. Each action is explained in greater detail in subsequent topics. See [Searching](#) for more information about working with the search box.

**List View** - displays information about teams in the source and target tenants. Use the **Edit Columns** to show or hide columns in the list. The columns are described as below:

- **User Name** - name of the user account.
- **Migration State** - migration status of chats from discovery to successful migration. Values are *Discovered*, *Migrating*, *Partially migrated*, *Partially migrated with Issues*, *Migrated*, *Migrated with Issues*, *Migration Failed*.
- **Account Type** - indicates the mailbox type of the user account. Values are *Mailbox-Enabled User* and *Non-Mail-Enabled User*.
- **ODM Licensed** - indicates whether or not an On Demand Migration user account license has been consumed when the account migration task is started. Values are *Yes*, *No*, *Not required*.
- **Account Matching** -(deprecated)
- **OneDrive Status** - migration status of the OneDrive files for this user.

- **Mailbox Status** - migration status of a user's mailbox. It is a best practice to migrate a mailbox before chats are migrated for any user. Values are *Discovered*, *Matched*, *Migrating*, *Migrated*, *Migrated with Issues*, *Migration Failed*, *Switched*, and *Migration Stopped*.
- **Migrated Chats** - number of chats that have been migrated.
- **Archived Chats** - indicates whether or not the archive option is selected during a chat migration. If the value is *Yes*, chats belonging to this user cannot be archived again.
- **Message Count (< 180 days)** - number of chat messages generated by the user in the last 180 days. There is a latency of 24-48 hours from the time a message is created.
- **Last Activity (< 180 days)** - most recent activity in the last 180 days. This data is provided by Microsoft based on user activity in Microsoft Teams.
- **Total Chats** - total number of chats in the source tenant.
- **Source UPN** - User Principal Name (UPN) of the source account.
- **Target UPN** - User Principal Name (UPN) of the target account.
- **Collections** - indicates the most recent collection where the corresponding Chat is added and the number of additional collections that also contain this object.

## Configuring the project

Before you begin, you must configure the teams migration project as described below:

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click **Teams** from the project tiles, or click **Open** from the Teams tile to open the *Teams* migration workspace.
5. Click **Configure Project**. The *Edit Project* wizard for Teams starts. You can specify default settings as described below:
6. **Project Settings**
  - a. **Set Migration Defaults** - specify a **Default target user** to use as the team owner when the existing owner has no match on the target tenant. Then click **Finish** to save the setting.
  - b. **Teams Migration Option** - select **Skip private channels during provisioning and migration** to prevent the provisioning of and migration of private channels. However, if private channels are already provisioned, this setting will be ignored and private channel content will be migrated.
  - c. **Chat Archive Setting** - specify a **Folder name for archived files** for archiving HTML chat files
  - d. Click **Next**.
7. **Migration Service Accounts**
  - a. Displays the current source and target tenant names along with the username that has granted consents to the tenant. If consents are missing for one or both tenants, then a warning message is shown to check the consents.
  - b. Click **Back** to revise or review a previous step or click **Finish** to save the configuration.

# 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:

- [Discovering all teams and groups](#)
- [Discovering teams and groups from a file](#)
- [Reviewing the Discover task](#)
- [Reviewing the Discover task events](#)

## Discovering all teams and groups

This is the simplest approach which uses the **Discover** tasks to inspect the source tenant and discover all the teams.

### **To start the Discover task:**

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click **Teams** from the project tiles, or click **Open** from the Teams tile to open the *Teams* migration workspace.
5. Click **Discover > Discover All** from the Teams dashboard.
6. The *New Teams & Groups Discovery Task* wizard starts. Each step is described below:

## 7. Discovery Options

New Teams & Groups Discovery Task

Discovery Options

Notification

Schedule

Summary

Select an option to discover Microsoft Teams and Groups provisioned in the source tenant

☐ All Teams

☐ All Groups

☒ All Teams and Groups

Step 1 of 3

Back Next Finish Cancel

**NOTE:** The Azure AD administrator account will be added to the discovered Teams and Groups.

- All Teams** - select this option to discover all Microsoft Teams.
- All Groups** - select this option to discover all Microsoft 365 Groups without Teams.
- All Teams and Groups** - select this option to discover Microsoft 365 Groups and Teams.
- Click **Next**.

## 8. Notification

- Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
  - Only in a case of failure** - select this option to send the email if the discovery task fails to complete successfully.
- Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
- Click **Next**.

## 9. Schedule

- Choose from one of three options to schedule the task. The scheduler will be activated only after you complete the task wizard.
  - Run now** - task runs immediately.
  - Run later** - task must be started manually.
  - Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- Click **Next**.

## 10. Summary

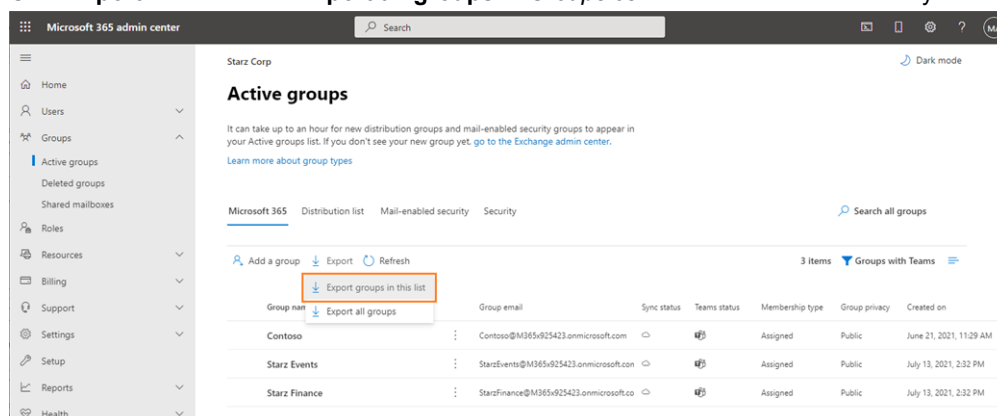
- a. Verify the task specifications as described below:
  - i. **Name** - name of the task. You can specify a custom name. The default name is **Discover**.
  - ii. **Source tenant** - name of the tenant where the statistics will be collected.
  - iii. **Target tenant** - name of the target tenant in 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.

## Discovering teams and groups from a file

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.

### Preparing 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.

	A	B
1	Group ID	Group name
2	58812962-49ba-4349-9df0-1d786edbc031	All Company
3	8ced605c-c2c0-4091-a071-d764d7f40b04	Contoso
4	3e4a88be-9302-4b9b-8bd5-a46dd48a9bbb	Starz Events
5	c0af280a-91f7-4825-8477-ade64776b80e	Starz Finance
6		
7		
8		
9		

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

### Starting the Discover Task

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click **Teams** from the project tiles, or click **Open** from the Teams tile to open the *Teams* dashboard.
5. Click **Discover > Discover from file** from the Teams dashboard.
6. The *New Teams & Groups Discovery Task* wizard starts. Each step is described below:
7. **Discovery Options**

## New Teams & Groups Discovery Task

Discovery Options  
Notification  
Schedule  
Summary

Select a comma-separated values (CSV) file that contains the list of Microsoft 365 Groups and Teams to be discovered. Refer to the documentation for details about the file format.

[Browse...](#)

Step 1 of 3

Back
Next
Finish
Cancel

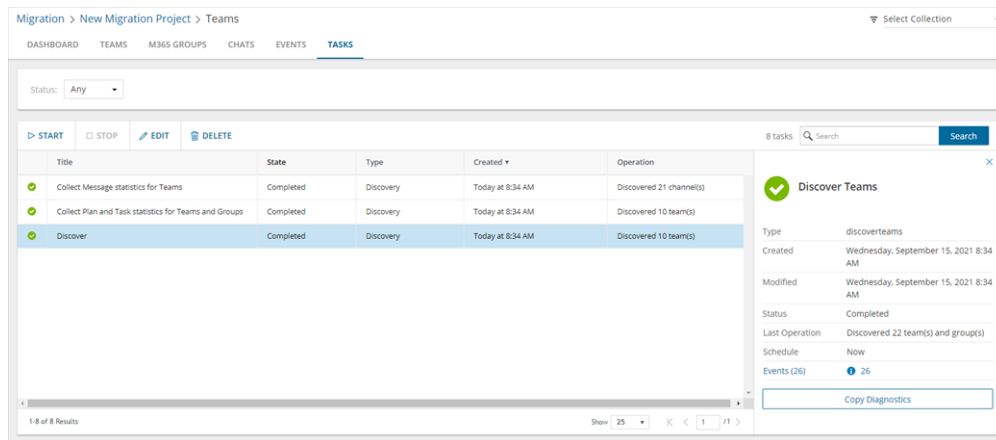
- a. Click **Browse** and select the CSV that contains the Group IDs and Group names of the teams that you want to discover.
  - b. Click **Next**.
8. **Notification**
  - a. **Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
    - **Only in a case of failure** - select this option to send the email if the discovery task fails to complete successfully.
  - b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
  - c. Click **Next**.
9. **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** - task runs immediately.
    - **Run later** - task must be started manually.
    - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
  - b. Click **Next**.
10. **Summary**
  - a. Verify the task specifications as described below:
    - i. **Name** - name of the task. You can specify a custom name. The default name is **Discover**.
    - 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.

## Reviewing the Discover Task

1. Open 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. **State** - state of the task.
  - e. **Last Operation** - the action that was most recently performed in this task.



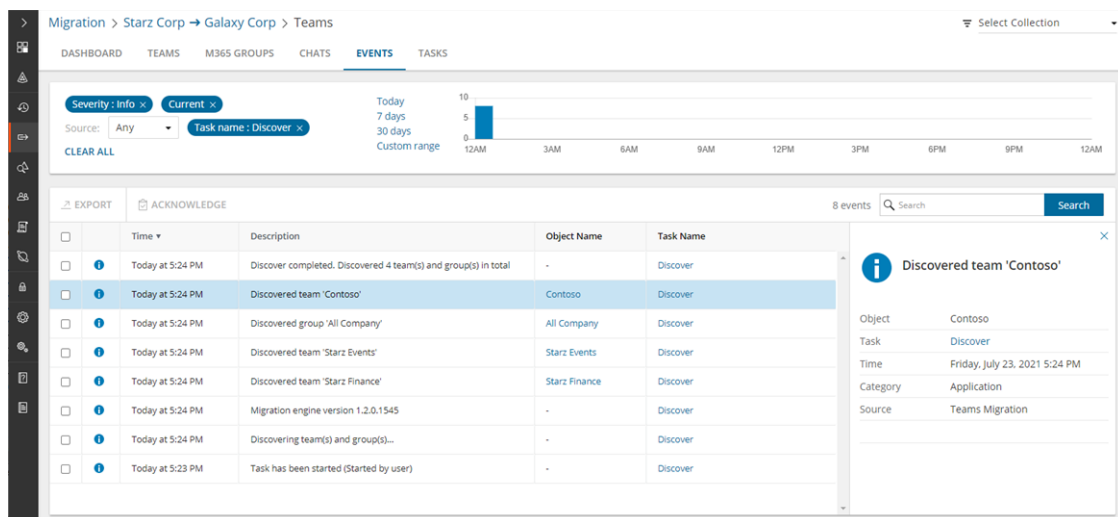
- f. **Schedule** - date and time when the task started. **Now** indicates that the task started immediately after the task was created.
- g. **Events (number)** - number indicates the count of events that the task encountered. The values indicate the type of the events and the event count for each type.



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.

## Reviewing the Discover Task Events

1. Open 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



# Discovering Teams

In this topic:

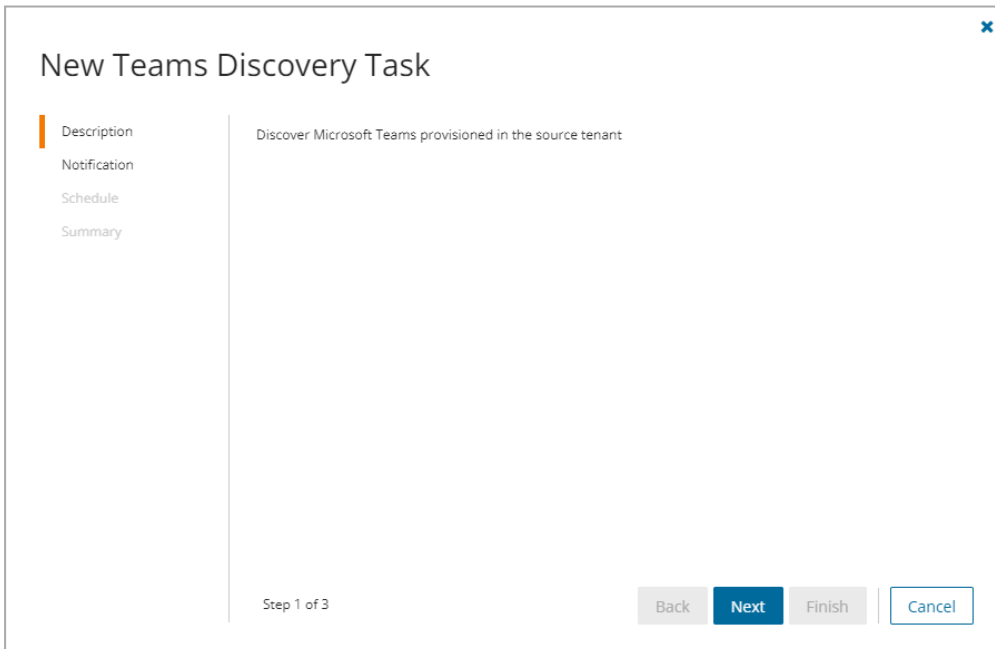
- [Discovering all Teams](#)
- [Discovering Teams from a file](#)
- [Reviewing the Discover Teams task](#)
- [Reviewing the Discover Teams task events](#)

## Discovering all Teams

This is the simplest approach which uses the **Discover Teams** tasks to inspect the source tenant and discover all the teams.

**To start the Discover Teams task:**

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click **Teams** from the project tiles, or click **Open** from the Teams tile to open the *Teams* dashboard.
5. Click **Discover Teams** from the *Teams* tile in the Teams dashboard  
-or-  
Select the **Teams** tab and select the **List View** if not already selected. Then click **Discover Teams > Discover All** from the *Actions* menu.
6. The *New Teams Discovery Task* wizard starts. Each step is described below:
7. **Discovery Options**



The screenshot shows a wizard window titled "New Teams Discovery Task" with a close button (X) in the top right corner. On the left is a vertical sidebar with four items: "Description" (highlighted with an orange bar), "Notification", "Schedule", and "Summary". The main content area displays the text "Discover Microsoft Teams provisioned in the source tenant". At the bottom left, it says "Step 1 of 3". At the bottom right, there are four buttons: "Back" (disabled), "Next" (active/highlighted), "Finish" (disabled), and "Cancel" (outlined).

- a. Click **Next**.

#### 8. Notification

- a. **Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
  - **Only in a case of failure** - select this option to send the email if the discovery task fails to complete successfully.
- b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
- c. Click **Next**.

#### 9. 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** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- b. Click **Next**.

#### 10. Summary

- a. Verify the task specifications as described below:
  - i. **Name** - name of the task. You can specify a custom name. The default name is **Discover Teams**.
  - 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.

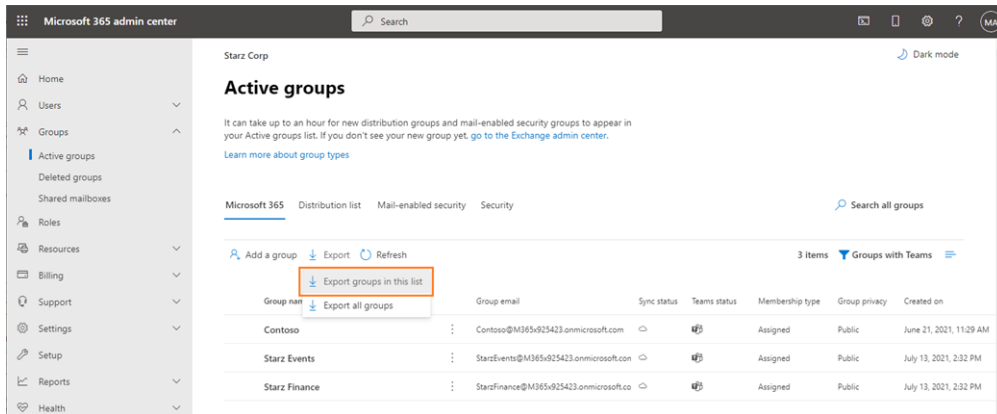
## Discovering Teams from a file

When you have a large set of teams but you want to migrate a subset of those teams, you can start the discovery process by using a CSV file. The CSV file lets you specify the teams that you want to discover and ignore the rest. This is a two-step process:

### Preparing 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**.

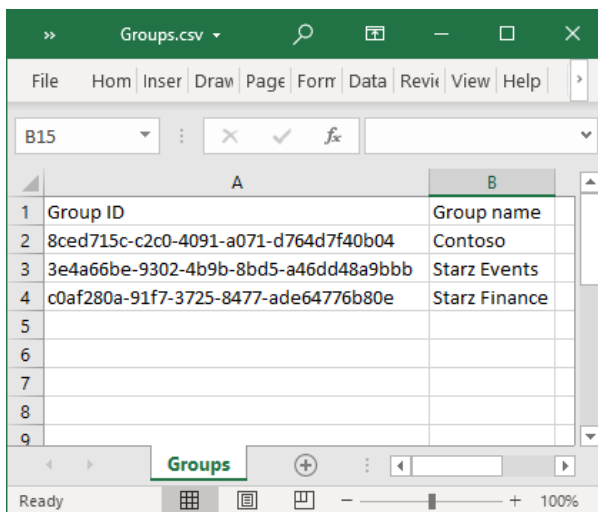
- Click **Export** and then click **Export groups in this list**. A *Groups.csv* file will be downloaded to your computer.



- 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.

#### NOTE:

- You can download a CSV template when you start the *New Teams Discovery Task* wizard and click **Download Example File** from the **Discovery Options** step.
- CSV file names with non-ASCII characters are not supported.



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

### Starting the Discover Teams Task

- Log in to Quest On Demand and choose an organization if you have multiple organizations.
- From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
- Create a new project or open an existing project.
- Click **Teams** from the project tiles, or click **Open** from the Teams tile to open the *Teams* dashboard.

5. Click the **Teams** tab and select the **List View** if not already selected. Then click **Discover Teams > Discover From File** from the *Actions* menu.
6. The *New Teams Discovery Task* wizard starts. Each step is described below:
7. **Discovery Options**

**New Teams Discovery Task**

Discovery Options  
Notification  
Schedule  
Summary

Select a comma-separated values (CSV) file that contains the list of Microsoft Teams to be discovered.

Sample CSV File [Download Example File](#)

Group ID, Group name
6fd73fd9-91f3-400f-b164-f77a95586078, Contoso

[Browse...](#)

Step 1 of 3

[Back](#) [Next](#) [Finish](#) [Cancel](#)

- a. Click **Browse** and select the CSV that contains the Group IDs and Group names of the teams that you want to discover.
  - b. Click **Next**.
8. **Notification**
- a. **Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
    - **Only in a case of failure** - select this option to send the email if the discovery task fails to complete successfully.
  - b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
  - c. Click **Next**.
9. **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** - task runs immediately.
    - **Run later** - task must be started manually.
    - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
  - b. Click **Next**.

## 10. Summary

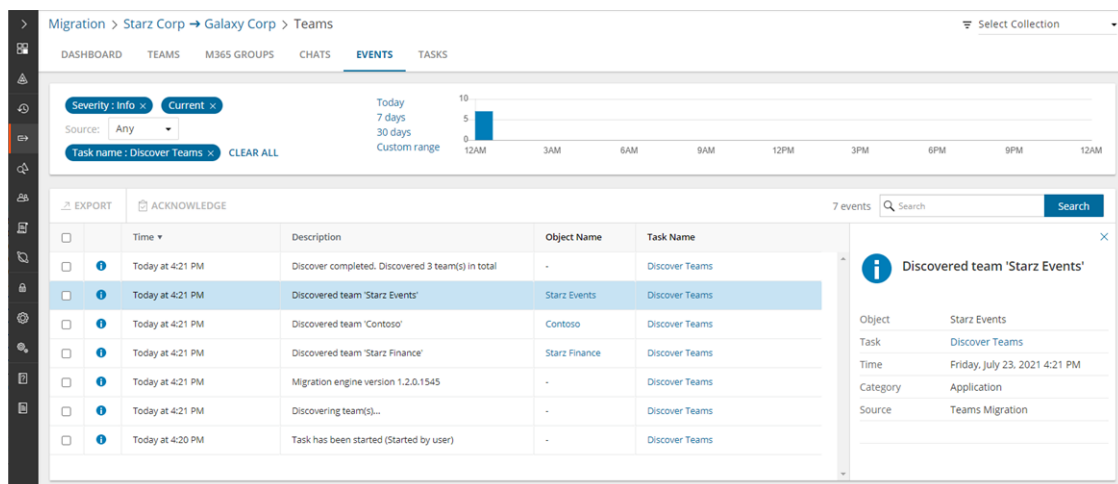
- a. Verify the task specifications as described below:
  - i. **Name** - name of the task. You can specify a custom name. The default name is **Discover Teams**.
  - ii. **Source tenant** - name of the tenant where the statistics will be collected.
  - iii. **Target tenant** - name of the target tenant 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.

## Reviewing the Discover Teams Task

1. Open 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. **State** - 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.

## Reviewing the Discover Teams Task Events

1. Open 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



# Managing Teams with Collections

Migrating large numbers of teams requires careful planning. The teams could belong to different offices and geographical locations or sensitive departments. Migrating teams of Finance or Legal departments require special care. Organize the teams into collections to make large team lists more manageable.

In this topic:

- [Adding Teams to Collections](#)
- [Working with the Collections Dashboard](#)

## Adding Teams to Collections

You can add teams to collections in several ways:

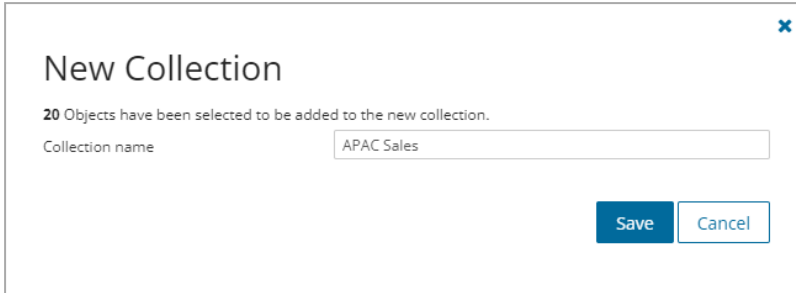
- [Select the teams and add to a new collection](#)
- [Select the teams and add to an existing collection](#)
- [Use a CSV file to add teams to one or more collections](#)

### **To add selected teams to a new collection:**

1. From the project dashboard, click **Open** in the *Teams* tile to open the *Teams* dashboard.
2. Click the **Teams** tab and select **List View** if not already selected.
3. Select the teams you want to add to the collection.



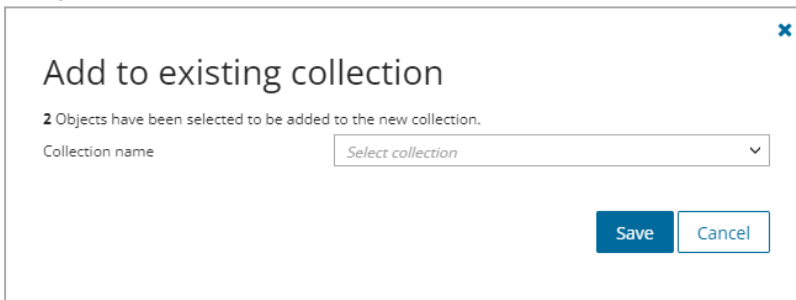
4. From the actions toolbar, click **Collections > New Collection**. The *New Collection* dialog opens.

A dialog box titled "New Collection" with a close button (X) in the top right corner. Below the title, it says "20 Objects have been selected to be added to the new collection." There is a text input field labeled "Collection name" containing the text "APAC Sales". At the bottom right, there are two buttons: "Save" (blue) and "Cancel" (white with blue border).

5. Enter a collection name in the **Collection name** field and click **Save** to add the selected teams to the collection.

**To add selected teams to an existing collection:**

1. From the project dashboard, click **Open** in the *Teams* tile to open the *Teams* dashboard.
2. Click the **Teams** tab and select **List View** if not already selected.
3. Select the teams you want to add to an existing collection.
4. From the actions toolbar, click **Collections > Add To Collection**. The *Add to existing collection* dialog opens.

A dialog box titled "Add to existing collection" with a close button (X) in the top right corner. Below the title, it says "2 Objects have been selected to be added to the new collection." There is a dropdown menu labeled "Collection name" with the text "Select collection" and a downward arrow. At the bottom right, there are two buttons: "Save" (blue) and "Cancel" (white with blue border).

5. Select a collection from the **Collection name** dropdown and click **Save** to add the selected teams to the collection.

**To add teams from a CSV file to a new or existing collection:**

Using a CSV file provides the following additional benefits:

- Multiple collections can be created with the same CSV file.
- Existing collections can be specified in the CSV file to add additional teams.
- Public Folders can be listed in multiple collections.

This is a two-step process as described below to add teams to one or more collections:

**Step 1: Prepare the CSV file**

1. From the actions toolbar, click **Collections > Import Collections**. The *New Import Collections from File Task* wizard starts.
2. From the **Mapping File** step, click **Download Example File**. A ZIP file is downloaded.

3. Extract the CSV file and use it to prepare your import file in one of three formats described below:

**i** **NOTE:** CSV file names with non-ASCII characters are not supported. Teams in the CSV that have not been discovered cannot be added to a collection.

Use the format shown below to prepare the CSV file. The minimal set of columns required are shown.

**i** **TIP:** You can export the selected teams to a CSV file and then add the **Collection** column and retain the **Source MailNickname** column. All other columns in the exported CSV file will be ignored so you can remove those columns if you want.

	A	B
1	Collection	Source MailNickname
2	APAC	StarzFinance
3	APAC	StarzEvents
4	Marketing	Events
5	Sales	Vendors
6	Sales	Sales
7	HQ	Corporate

- **Collection** - Column header for the collection name. If a collection in the CSV does not exist, a new collection will be created with the name specified in the CSV.
- **Source MailNickname** - Email alias of the M365 group of the team. You can get the **Source MailNickname** property of the teams when you [export teams](#) to a CSV file. **Source MailNickname** values are case-sensitive.

## Step 2: Import the CSV file

1. Open the **Teams** tab.
2. From the actions toolbar, click **Collections > Import Collections**. The *New Import Collections from File Task* wizard starts.
3. **Mapping File**
  - a. Click **Browse** and select the CSV file. The selected CSV file name appears.
4. **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** - task runs immediately.
    - **Run later** - task must be started manually.
    - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
  - b. Click **Next**.
5. **Summary**
  - a. Verify the task specifications as described below:
    - i. **Name** - name of the task. The default name is **Import Collections From File**. You can specify a custom name.

- ii. **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.
- c. Click **Finish**.

***To verify the addition of the team to a collection:***

1. Check the **Collections** column in the Teams List View that indicates the most recent collection where the team has been added and the number of additional collections that also contain the team.
2. Select a team from the Teams List View to open the Team Detail pane. Check the **Collections** property that lists all the collections where the team has been added.

## Working with the Collections Dashboard

The Collection Dashboard shows the collection-specific summary, allows you to see teams added to it, create tasks for them, and monitor the progress of tasks.

***To view the collection dashboard for an existing collection:***

1. From the project dashboard, click **Open** in the *Teams* tile to open the *Teams* workspace.
2. From the top-right corner of the workspace, click **Select Collection** and then select the collection to view. The collection *Dashboard* is displayed.
3. Open the **Teams** tab. You will see the list of teams that belong to the collection.

***To remove items from a collection:***

- a. From the actions toolbar, click **Collections > Remove from Collection**.
- b. In the confirmation dialog click **Remove** to remove the selected Teams from the collection.

***To rename the collection:***

- a. Click **Collections > Rename Collection** in the Actions toolbar of the collections dashboard.

***To delete the collection:***

- a. Click **Collections > Delete Collection** in the Actions toolbar of the collections dashboard.

***To see the tasks for collection-specific teams:***

- a. Open the **Tasks** tab.

***To see the events related to the collection:***

- a. Open the **Events** tab.

***To return to the Teams migration workspace:***

- a. Click the collection dropdown at the top-right corner of the page, and select **Show All**.

# Exporting Teams

**To export teams to a comma-separated values (CSV) file:**

1. Click **Teams** from your migration project
2. Click the **Teams** tab. From the *Teams List View* select the teams you want to export.
3. From the *Teams List View* select **More > Export**.
4. Open the CSV file by extracting it from the ZIP file that is downloaded to your computer.

The exported data contain the following information:

- **Team Name** - source team name
- **Workflow** - (deprecated) the most recent operation performed on the team
- **Channel, Members, Messages, Plans, Tasks** - counts of various content in the team.
- **Size(MB)** - size of all the content in the team.
- **Last Activity** - date and time of the last action performed on the team record.
- **Created** - date and time the team record was created
- **Target Team Name** - suggested target team name that will be provisioned in the target tenant
- **Source MailNickname** - email alias of the associated Microsoft 365 Group. This value will be used for the mail enabled object and will be used as PrimarySmtpAddress for this Microsoft 365 Group. The value must be unique across your tenant.
- **Last Operation Description** - description of the last operation performed on this team.

# Provisioning Teams

The provisioning task helps you with the following premigration preparations:

- Provision teams in the target tenant.
- Resolve naming conflicts.

## Considerations

1. After all source teams are discovered you can begin provisioning teams on the target tenant with a Teams Provisioning Task. Verify that all associated accounts are matched or migrated before you create the provision task.
2. A **Group Map** task will be automatically created in the *Accounts and User Data* migration workspace of the project. The purpose of this task is to match the team-related group accounts so that the On Demand Migration for SharePoint service can use the mapping for membership migration.
3. If one or more new private channels or shared channels are added to a source team after provisioning, then you must re-provision the team in the target tenant to ensure that the SharePoint content is discovered for those new channels.

4. When teams are provisioned, the account that is assigned the Migration Service role will be added to the source teams, private channels and shared channels to prepare for migrating the channel settings to the target tenant.
5. When teams are provisioned on the target tenant, a *Discover SharePoint Contents Task* is run automatically. The task discovers the corresponding SharePoint site collection and its contents listed in the *SharePoint Contents* tab.
6. When teams are provisioned on the target tenant, some scenarios like team renaming, multi-geo and others, will automatically trigger one or more SharePoint mapping tasks.
7. Teams in the target tenant may take up to 24 hours to be fully provisioned by Microsoft.

## Starting the provisioning task

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click **Teams** from the project tiles, or click **Open** from the Teams tile to open the *Teams Migration Workspace*.
5. Select one or more teams from the *Teams List View*.
6. Click **Provision**. The *New Teams Provisioning Task* wizard starts. Each step is described below:
7. **Provision Options**

**New Teams Provisioning Task**

Provision Options

Channel Filter

Notification

Schedule

Summary

If a team does not exist on target, it will be provisioned  
If a team with the same name exists on target:

☒ Provision a new team on the target with the original name plus suffix

☐ Merge to the existing team on target

Provide a suffix for the display name of the new team

New team display name suffix:

Tip: Use Map from file action to provision the new team with custom name, or to create a custom mapping.

Preferred location in target multi-geo tenant

teams location:

Tip: Set the 'Default target geo location' property with the Configure Project action from the SharePoint dashboard.

☐ Suppress Group Welcome Message

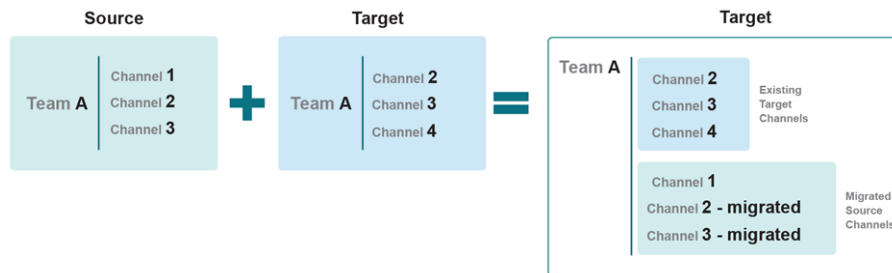
Step 1 of 4

Back Next Finish Cancel

- a. Choose from the following options if a team with the same name exists on target:
  - **Provision a new team on the target with the original name plus suffix** - Select this option to provision a new team on the target tenant by adding a suffix to the team name.
    - **New team display name suffix** - The default suffix is *Migrated*. You can specify another suffix.
  - **Merge to the existing team on target** - Select this option to merge a team in the source tenant with a team in the target tenant that has the same name. Then select an option if a

team channel with the same display name already exists in the target team:

- **Provision a new channel on the target with the original name plus suffix** - Select this option to provision a new team channel on the target tenant by adding a suffix to the channel name.
- **New channel display name suffix** - The default suffix is `Migrated`. You can specify another suffix.
- **Merge source channel conversations with the Target channel** - Select this option if the target channel is empty.



- b. **Preferred location in target multi-geo tenant** - Leave the preferred data location as **Default** if the target is a multi-geo tenant and you have already configured a default geo location for the target tenant. All teams and groups will be migrated to the same region. To set up the default geo location, see [Configuring the Migration Project](#). If you change the default settings, please allow at least 5 minutes for the new settings to take effect. Alternatively, select the geo location configured for the target tenant.

**TIP:** To migrate teams to different regions, the best practice is to create a collection of teams for each region (see [Using Collections for Teams](#)). Example collection names could be "Migrate to EUR", "Migrate to JPN" or "Migrate to NAM". Then use the collection as a filter to create the provision task.

For more information about multi-geo tenants, see [Microsoft 365 Multi-Geo](#).

- c. **Suppress Group Welcome Message** - Select this option to prevent spamming users with welcome messages when Teams are provisioned on the target tenant.

**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.

- d. Click **Next**.

## 8. Channel Filter

With this filter, you can include or exclude specific channel types such as Private, or Shared. Standard channels are always included.

- Private** - select this option to include private channels.
- Shared** - select this option to include shared channels.
- Click **Next**.

## 9. Notification

- Send notification email once the task is completed** - select this option to send a notification email when a provisioning task completes.

- **Only in a case of failure** - Select this option to send the email if the provisioning task fails to complete successfully.
  - b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
  - c. Click **Next**.
10. Step 4. **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** - task runs immediately.
    - **Run later** - task must be started manually.
    - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
  - b. Click **Next**.
11. **Summary**
- a. Verify the task specifications as described below:
    - i. **Name** - name of the task. You can specify a custom name. The default name is **Provision Teams**.
    - ii. **Source tenant** - name of the tenant in this project.
    - 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 provisioning task is created. You can track its progress from the **Tasks** tab, view the summary on the Dashboard or monitor alerts and notifications from the **Events** tab.

## Mapping Teams

You can rename and map teams, or rename, map and merge one or more source teams to a specific team in the target tenant in two ways:

- [Mapping and renaming teams from the Teams list](#)
- [Mapping, renaming and merging teams from a file](#)

### Mapping and Renaming Teams from the Teams list

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click **Teams** from the project tiles, or click **Open** from the Teams tile.
5. Go to the **Teams** tab and select one or more teams from the Teams list that you want to rename and map.

6. Click **More > Rename and Map**. The *New Teams & Groups Rename and Map Task* wizard starts. Each step is described below:
7. **Mapping options**
  - a. Enter the information as described below:
    - **Add prefix** - specify a prefix for the team name. Whitespaces are not supported.
    - **Add suffix** - specify a suffix for the team name. Whitespaces are not supported.
  - b. Click **Next**.
8. **Notification**
  - a. **Send notification email once the task is completed** - select this option to send a notification email when a mapping task completes.
    - **Only in a case of failure** - select this option to send the email if the mapping task fails to complete successfully.
  - b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
  - c. Click **Next**.
9. **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** - task runs immediately.
    - **Run later** - task must be started manually.
    - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
  - b. Click **Next**.
10. **Summary**
  - a. Verify the task specifications as described below:
    - i. **Name** - name of the task. You can specify a custom name. The default name is **Rename and Map Task**.
    - ii. **Source tenant** - name of the tenant in this project.
    - 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 task is created. You can track its progress from the **Tasks** tab, view the summary on the *Dashboard* or monitor alerts and notifications from the **Events** tab.

## Mapping, Renaming and Merging Teams from a File

To rename teams or merge one or more source teams to a specific team in the target tenant, a CSV file is used to indicate the mapping between source and target teams, as described below.





#### NOTE:

When teams are renamed and provisioned in the target tenant, Microsoft creates a default OneNote tab. Since ODM migration service is not aware of this default tab, any OneNote content that is migrated will retain the original name and will not appear in the default target OneNote tab of the renamed team.

There are two scenarios with OneNote migration when teams are merged:

- a. When one or more teams are merged to a team with a different name in the target tenant, Microsoft creates a default OneNote tab for the renamed target team. Since ODM migration service is not aware of this default tab, any OneNote content that is migrated will retain the original name and will not appear in the default target OneNote tab of the renamed team.
- b. When one or more teams are merged to a team with a preexisting team in the target tenant, contents in the OneNote tab in the target tenant is overwritten with the content from the source.

#### To create the mapping file:

1. Prepare a comma-separated values (CSV) file with the source and target team names.



#### TIP:

- Export selected teams to a comma-separated values (CSV) and then edit this file. See [Exporting Teams](#) for more details.
- You can download a CSV template when you start the *New Mapping from File Task* wizard and click **Download Example File** from the **Mapping File** step.
- CSV file names with non-ASCII characters are not supported.

2. The header row defines the names of the source and target attributes used for mapping. Subsequent rows list the mapping values of the attributes.

The columns are as follows:

- **Source Mailnickname** - unique name of the source team. The following column header variations are supported: `SourceMailNickname`, `Source MailNickname`, `Source MailNickName`. The column header is case sensitive.
- **Target Mailnickname** - unique name of the target team. The following column header variations are supported: `TargetMailNickname`, `Target MailNickname`, `Target MailNickName`. The column header is case sensitive. You can merge multiple source teams to a single target team when you specify the same **Target Mailnickname** in a mapping file.
- **Target Team Name** - display name of the target team. The column header is case sensitive. If two or more records have the same **Target Mailnickname** then the **Target Team Name** for each record must be specified and must be the same.

	A	B	C	
1	Source Mailnickname	Target Mailnickname	Target Team Name	
2	Corporate	CompanyNews	Company News	Example 1
3	StarMarketing	GalaxyMarketing	Galaxy Marketing	Example 2
4	StarEvents	GalaxyEvents	Galaxy Marketing	
5	TeamSales	GalaxySales	Galaxy Sales Team	Example 3
6	GlobalSales	GalaxySales	Galaxy Sales Team	
7	SalesMembers	GalaxySales	Galaxy Sales Team	

**Example 1:** Row 2: Simple change of name

The name properties of the source team will change to the Target Mailnickname and Target Team Name respectively.

**Example 2:** Rows 3 and 4: Different target teams with the same display name

The Target Mailnicknames are different but the Target Team Names are the same. The Target Mailnickname takes precedence and the teams will be mapped to distinct Target Mailnicknames but the display name of each target team will be the same. It is recommended that you use unique display names to avoid confusion.

**Example 3:** Rows 5, 6 and 7: Merge multiple source teams with the same target team

The Target Mailnickname is the same. The teams will be merged with the same target team with the specified display name.

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

**To upload the mapping file:**

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click **Teams** from the project tiles, or click **Open** from the Teams tile to open the *Teams* dashboard.
5. Click the **Teams** tab.
6. Click **More > Map from File**. The *New Mapping from File Task* wizard starts. Each step is described below:

New Mapping from File Task

Mapping File  
Notification  
Schedule  
Summary

Select a comma-separated values (CSV) file with custom mapping of source and target teams or M365 groups.  
Example 1 CSV File (Team) [Download Example File](#)

Source MailNickname,Target MailNickname,Target Team Name  
Contoso,Contoso,Contoso

Example 2 CSV File (Group)

Source MailNickname,Target MailNickname,Target Group Name  
GroupWithoutTeam,MapFromFileGroup,MapFromFileGroup

[Browse...](#)

Step 1 of 4

[Back](#) [Next](#) [Finish](#) [Cancel](#)

**7. Mapping file**

- a. Click **Browse** and select the CSV mapping file. The selected file name appears next to the **Browse** button.
- b. Click **Next**.

**8. Notification**

- a. **Send notification email once the task is completed** - select this option to send a notification email when a mapping task completes.

- **Only in a case of failure** - select this option to send the email if the mapping task fails to complete successfully.
- b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
  - c. Click **Next**.
9. **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** - task runs immediately.
    - **Run later** - task must be started manually.
    - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
  - b. Click **Next**.
10. **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 in this project.
    - 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 task is created. You can track its progress from the **Tasks** tab, view the summary on the *Dashboard* or monitor alerts and notifications from the **Events** tab.

## Removing Teams

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

When teams are removed, all associated items, mappings and migration information will also be removed from the project. When these teams are rediscovered, they will be treated as new teams in the project and the process of provisioning and migration of the teams and related items must be repeated.

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **Teams** tile, or click **Open** from the Teams tile to open the *Teams* dashboard.
5. Select the **Teams** tab and select **List View** if not already selected.

6. Select the teams you want to remove.



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

7. Click **More > Delete**. The *New Remove Team Mappings Task* wizard starts.

#### 8. Description

- a. Click **Next**.

#### 9. Notification

- a. **Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
  - **Only in a case of failure** - select this option to send the email if the discovery task fails to complete successfully.
- b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
- c. Click **Next**.

#### 10. 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** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- b. Click **Next**.

#### 11. Summary

- a. Verify the task specifications as described below:
  - i. **Name** - name of the task. You can specify a custom name. The default name is **Remove Teams**.
  - ii. **Source tenant** - name of the source tenant in this project
  - 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.

## Collecting Statistics

The **Collect Team Statistics Task** for Teams conducts an assessment of all teams in the source tenant and matching teams in the target tenant. It provides information like member count, content size (in GB), planner count and planner task count for the teams in the source tenant, and optionally in target tenant if the team is already provisioned.

Each **Collect Team Statistics Task** generates events. Events are milestones that a task achieves as it runs. For example, when a **Collect Team Statistics Task** starts, an event is logged and it appears in the events list. When

the number of teams that are selected for assessment is large, the **Collect Team Statistics Task** divides the total number of teams into manageable sets. Each set is called a batch. When a batch of accounts is assessed, another event occurs.

In this topic:

- [Starting a Collect Team Statistics Task](#)
- [Reviewing the Collect Team Statistics Task](#)
- [Reviewing the statistics collected](#)
- [Reviewing the events for the Collect Team Statistics Task](#)

## Starting a Collect Team Statistics Task

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **Teams** tile, or click **Open** from the Teams tile to open the *Teams* workspace.
5. Select the **Teams** tab and then select **List View** if not already selected.
6. Select the teams 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 starts. Each step is described below:
8. **Collect Statistics Options**
  - a. Choose from the following options
    - **Include collection of statistics from target tenant** - select this option to include the same teams from the target tenant and generate the [Comparison Report](#). Statistics will be collected for the target tenant teams only if a provision task was previously run for the teams.
    - Collection levels:
      - **Basic (Fast)** - collect statistics about member count and content size (in GB) for the teams selected in the source and target tenant if provisioned.
      - **Advanced (Slow)** - collect statistics about member count and content size (in GB), planner count and planner task count for the teams selected in the source and target tenant if provisioned. The task requires more time to run.
  - b. Click **Next**
9. **Notification**
  - a. **Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
    - **Only in a case of failure** - Select this option to send the email if the discovery task fails to complete successfully.
  - b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
  - c. Click **Next**.

#### 10. 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.
  - **Run now** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- b. Click **Next**.

#### 11. **Summary**

- a. Verify the task specifications as described below:
  - i. **Name** - name of the task. You can specify a custom name. Default name is **Collect Team Statistics Task**.
  - 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.

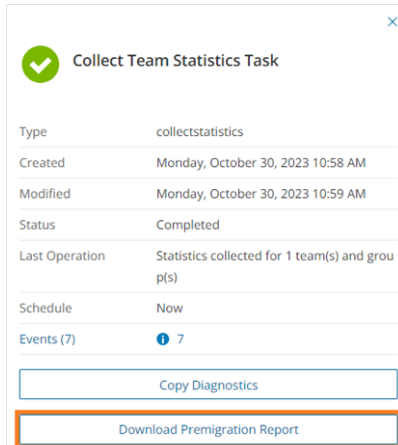
#### 12. Review the statistics collected

- a. Open the Teams workspace.
- b. Select the **Teams** tab and then select **List View** if not already selected.
- c. Review the statistics collected for each team. The statistics displayed depends on the option selected in the *New Collect Team Statistics Task* wizard.

## Reviewing the Collect Team Statistics Task

1. Open the **Tasks** tab.
2. Select the Collect Statistics task for teams 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 `collectstatistics`.
  - 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.
  - h. From the task details pane, click **Download Premigration Report**. Download and save the ZIP file

to a suitable folder, and extract the report.



**NOTE:** Premigration reports are also available from the following tasks:

- Discover All
- Discover From File
- Provision

## Reviewing the events for the Collect Team Statistics Task

1. Open the **Tasks** tab.
2. Select a **Collect Statistics** task for teams 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** - name of the team if applicable.
  - 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** - the workspace from where the event was generated. The value is **Teams Migration**.

EXPORT	ACKNOWLEDGE	EDIT COLUMNS	5 events <input type="text" value="Search"/>	
<input type="checkbox"/>	Time	Description	Object Name	Task Name
<input type="checkbox"/>	Today at 1:26 PM	Collect Statistics completed. Statistics collected for 1 team(s)/group(s)	-	Collect Statistics
<input type="checkbox"/>	Today at 1:26 PM	Discovered team 'Communications'	Communications	Collect Statistics
<input type="checkbox"/>	Today at 1:26 PM	Migration engine version 1.2.0.7074	-	Collect Statistics
<input type="checkbox"/>	Today at 1:26 PM	Starting Collect Statistics	-	Collect Statistics
<input type="checkbox"/>	Today at 1:25 PM	Task has been started (Started by user)	-	Collect Statistics

1-5 of 5 Results

Show 25 < 1 / 1 >

**i** Collect Statistics completed. Statistics collected for 1 team(s)/group(s)

Object

Task Collect Statistics

Time Wednesday, May 24, 2023 1:26 PM

Category Application

Source Teams Migration

# Premigration 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** - (deprecated) 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.

# Migrating 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.



## Considerations

1. Channels are dedicated sections within a team to keep conversations organized. Channel membership can be *Standard*, *Private* or *Shared*.
2. When teams are migrated, the account that is assigned the Migration Service role is added to the team. If dynamic membership is enabled, the rules are modified to include this account. This temporary role is required for migrating teams by the On Demand Migration for Teams service.
3. Teams in the target tenant may take up to 24 hours to be fully provisioned by Microsoft after they are created during a Teams provisioning task. We recommend that you migrate only those teams which are provisioned at least 24 hours before they are migrated.
4. When teams are migrated, the *SharePoint Contents* list is updated, and the **Migration 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.
5. When a team with same name already exists in the target tenant and the merge option is selected for migration, contents of the note in the target tenant is overwritten with the contents from the source.

In this topic:

- [Configuring the project for migrating teams](#)
- [Starting a Migrate Teams Task](#)

## Configuring the project

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click **Teams** from the project tiles, or click **Open** from the Teams tile to open the *Teams* dashboard.
5. Click **Configure Project** from the dashboard menu. The *Edit Project* wizard starts. Each step is described below:
6. **Project Settings**
  - a. **Set Migration Defaults**  
**Default Target User** - Specify a user principal name (UPN) to use as the team owner when the existing owner has no match in the target tenant.
  - b. **Teams Migration Option**  
**Skip private channels during provisioning and migration** - select this option to prevent the provisioning of and migration of private channels. However, if private channels are already provisioned, this setting will be ignored and private channel content will be migrated.
7. Click **Finish**.

## Starting a Migrate Teams Task

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

5. Select one or more teams from the *Teams List View*.

**i** **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 Teams Migration Task* wizard starts. Each step is described below:

7. **Start**

- a. **Task Name** - You can specify a custom name. The default name is **Migrate Teams**.
- b. **Use the settings from an existing migration template for this task** - select this option if you have already saved a previous migration templates. If this is the first time you are migrating mailboxes, keep this option unchecked.
  - **Select template** - select a template that you previously created, from the dropdown list.
- c. **Go to Summary step** - select this option to preserve the settings and go directly to the last step of the wizard. If you do not select this option, but you have selected a template, you can step through the wizard and edit the settings in the template.
- d. Click **Next**.

8. **Migration Options**

- a. Choose from the following options:
  - **Channel Posts (Messages)** - select this option to migrate the posts or messages in a channel.
    - **Archive** - select this option to migrate and archive channel messages as an HTML file for each channel. The HTML file is added to the file list of the team's SharePoint site in the target tenant. A new message from the target tenant Administrator is added to each migrated channel with a link to its HTML file. A new tab called *Conversation History* is created in the target channel and the archived messages are displayed there.
    - **All messages** - migrate and archive all messages across all channels in the team

- **Messages older than 15 days** - migrate and archive messages across all channels in the team that are older than 15 days.
- **Messages older than 30 days** - migrate and archive messages across all channels in the team that are older than 30 days.
- **Messages older than 60 days** - migrate and archive messages across all channels in the team that are older than 60 days.



#### NOTE:

Messages that are more recent than the 15, 30 or 60 days option that is selected will be migrated but not archived.

Links to files that are not yet migrated to the target will not work. remigrate Teams using **Channel Files** to ensure the links work correctly. To learn more, see [remigrating messages and files](#).

If the migration task is *successful* and the archive HTML file is created in the target tenant, it cannot be modified by subsequent migrations. If you attempt another migration and select the **Archive** option, the **Archive** option is ignored. All new and modified channel messages from the selected teams will be migrated and posted to the corresponding team channels in the target tenant. Messages already archived will be skipped unless they were subsequently modified (edited or linked to replies or attachments) in the source tenant.

If the migration task is *unsuccessful* and the archive file is *not* created, subsequent migrations with the **Archive** option selected will attempt to create an archive HTML file in the target tenant. Archive sub-options like **All**, **Messages older than 15 days**, **Messages older than 30 days** or **Messages older than 60 days**, are re-evaluated for all messages in the channel. The new set of messages selected for archival may not be the same set of messages identified in the previous archive attempt.

- **Migrate Bot Messages** - select this option to migrate bot messages.
- **SharePoint Content** - select this option to migrate SharePoint content linked to teams selected for migration.
  - **Standard (Channel files only)** - select this option to migrate files, OneNote, Word, Excel and PowerPoint tabs added to the channel.
  - **Standard and Customized (All SharePoint Content)** - select this option to migrate OneNote, Word, Excel, PowerPoint and List tabs added to the channel, and site collections which includes any customized content such as descendant websites and lists.
  - **Include site level term group for site migration** - select this option to add site level metadata to the target Global Term Store. The Global Term Store must be migrated before you can use this option, otherwise an error will be logged as an event. For more information, see [Migrating the Global Term Store](#).



**NOTE:** For better performance and accountability the **Get Total File Size** task is automatically scheduled to run 24 hours after the migration task completes.

For each team that is being migrated, the task calculates the total size of files across all channels of the team from the source and the target tenants. These totals are displayed in the Teams List view.

If you manually start the task before 24 hours of the migration task, you may not get accurate results. The task retains its original schedule and runs 24 hours after the migration task completes.

- **Planner** - select this option to migrate the Planner buckets, tasks, comments and the corresponding Planner tabs in teams.
- **Group Mailbox** - select this option to migrate the Microsoft 365 Group mailbox.
- **Team Membership** - select this option to migrate team members. If this option is not selected, team members will not be migrated. If the team member or owner was not matched or migrated by an account migration task, a warning is reported: Cannot add \*\*\* as group \*\*\*: User Mapping does not exist. *Workaround:* Match or migrate the account and then re-run the task with this option selected.

b. Click **Next**.

## 9. File Version Options

a. Choose the migration option for file versions associated with teams selected for migration.

- **Latest version only** - select this option to migrate the most recent version of the file. All other versions will be ignored. This is the default selection.
- **More versions** - select this option to migrate additional versions of a file based on the options described below. Large version sets take a significantly long time to migrate.
  - **Number of versions** - 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** - 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** - 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 site 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 dropdown list. 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** - select this option to migrate the latest version of the file, and all previous versions 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 dropdown list. 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 site version does not exceed the selected size limit, then the file and its versions will be migrated.

b. Click **Next**.

## 10. SharePoint Permission Options

**New Teams Migration Task**

Start ✓  
Migration Options ✓  
File Version Options ✓  
**SharePoint Permission Options**  
SharePoint File Options  
Sensitivity Labels  
Archiving Options  
Notification  
Reporting  
Schedule  
Summary

☒ Migrate permissions.  
☐ Migrate permissions only for previously migrated webs and lists (not including list items).  
☒ Do not migrate Sharing Links permissions.  
☐ Migrate Sharing Links permissions as direct permissions. Migration is slower.

Step 4 of 11

[Back](#) [Next](#) [Finish](#) [Cancel](#)

- a. Select how Sharing Links permissions are migrated. Direct permissions are always migrated.
- **Migrate permissions** - select this option so that unique permissions associated with web, list and list items are migrated. If you clear this option all other options in this step are deactivated and permission migration is prevented. When permissions are not migrated, the permissions for new migrations of web, list and list items, that are not already on the target tenant, will be inherited from its parent. The permissions will not be changed for migrations of content that was already migrated to the target tenant.
  - **Migrate permissions only for previously migrated webs and lists** - select this option to migrate permissions for webs and lists only. Permissions will be merged with any existing permissions on the target tenant. List item permissions are not migrated with this option because list item permissions cannot be migrated separately from the list item. To re-migrate list items and its permissions, re-migrate the whole list without selecting this option. Selected objects must be in a *migrated* or *migrated with issues* state for this option work.
  - **Do not migrate Sharing Links permissions** - select this option to ignore Sharing Links permissions.
  - **Migrate Sharing Links permissions as direct permissions.** - select this option to migrate Sharing Links permissions. These permissions will be migrated as direct permissions. The conversion and migration of Sharing Links permissions takes more time to migrate. Migration is slower.
- b. Click **Next**.

## 11. SharePoint File Options

- a. Choose from the following options to determine how changes to list items that were previously migrated should be remigrated:
- **Refresh list items** - an incremental migration is performed to repair and update the target list with missing or new items.
  - **Migrate all list items** - all list items are remigrated.

- b. Choose a conflict resolution option.



**NOTE:**

- Conflict resolution rules are applied only to list items that have been previously migrated.
  - Conflict resolution rules will not be applied if the **Migrate all list items** option is selected in the previous step. All files in the target tenant will be overwritten if all files are migrated.
  - Conflict resolution rules will not be applied to Site Pages and Site Assets system libraries.
- **Overwrite target files** - all migrated files in the target tenant will be overwritten. Migration is fastest with this option selected. For default Notebooks, target channel Notes will be overwritten if the source and target teams and channels have the same name.
  - **Skip if target list item is the same version or newer** - ignore list items in the target tenant with the same or newer version. If the item does not exist in the target tenant, a copy of the source item will be migrated. For default Notebooks, target channel Notes will be preserved even if the source and target teams and channels have the same name.
  - **Create a copy if target list item is the same version or newer** - preserve the list item in the target tenant with the same or newer version and migrate a copy of the source item. When you choose this option, you must choose from one of the following file suffix options: `_Copy`, `_Source`, `_Older`, `_Backup`, and `_1`. For default Notebooks, target channel Notes will be preserved and no copies are created even if the source and target teams and channels have the same name.
- c. **Migrate list and library comments** - select this option to include list and library comments in the migration task. A large number of list and library comments increase task processing time.
- d. **Auto re-run list item migrations to retry missing items** - select this option to automatically re-run the list item migration during list migrations to retry and repair missing items.
- e. **Migrate Enterprise Keyword column values** - select this option to migrate Enterprise Keywords. The [Global Term store](#) must be migrated using the SharePoint migration service. In the context of SharePoint or Microsoft 365, enterprise keywords are terms that are part of the Term Store, which is a centralized repository used to manage metadata (or tags) for content within the organization.
- f. Click **Next**.

## 12. Sensitivity Labels

Choose how you want to migrate sensitivity labels applied to associated SharePoint content. Sensitivity labels require specific tenant permissions. They must be discovered and matched before you can use the following options. For more details, see the topic [Sensitivity Labels](#).

- a. **Process document sensitivity labels** - select this checkbox to enable sensitivity label processing if you have already configured and matched sensitivity labels.



**CAUTION:** Encrypted documents may be inaccessible on the target tenant if sensitivity labels that are applied to documents in the source tenant are not processed. If a document is encrypted in the source, then it is decrypted, labels are processed and the document is reencrypted in the target.

- **Match and apply corresponding labels to documents migrated to the target** - select this option to match and apply sensitivity labels during migration. If the label in the source document has a matching label in the target (there is a corresponding target label in the On

Demand repository), the source label is replaced by the target label. If the label in the source document has no matching label in the target (there is no corresponding target label in the On Demand repository), the document is not migrated.

- **Remove sensitivity labels from documents migrated to the target** - select this option to clear the labels from migrated documents. Labels on documents in the source tenant are not changed.

b. Click **Next**.

### 13. Archiving Options

**NOTE:** If you archive the source team without using On Demand Migration (e.g., by using Microsoft tools), then you can migrate the source team and archive the target team. If you archive the source team using On Demand Migration then you can migrate the target team but you cannot archive the target team.

- Archive the source team after migration** - select this option to archive the source team after migration. If you select this option you cannot archive the target team.
    - **Make source SharePoint site read only** - this option is available if option (a) is selected. Select this option to set the associated SharePoint site to read only for the team members.
  - Archive target team if source team is archived** - select this option to archive the target team after migration. Archived teams cannot be updated or remigrated. This option is not available if option (a) is selected.
    - **Make target SharePoint site read only** - this option available if option (b) is selected. Select this option to set the associated SharePoint site to read only for the team members.
- c. Click **Next**.

### 14. Notification

- Send notification email once the task is completed** - select this option to send a notification email when a migration task completes.
  - **Only in a case of failure** - select this option to send the email if the migration task fails to complete successfully.
- Recipients** - enter the email address of the recipients of this email. You can specify multiple



recipient email addresses separated by semicolon.

- c. Click **Next**.

## 15. Reporting

Select the check box **Generate detailed report of migration errors** to generate a migration error report when you run the migration task.

You can download the report from the **Reports** tab of the *Teams* workspace by clicking the **Download** link in the **Error Log** column. If there are no migration errors, a download link is not available. Error reports are retained for 30 days. After 30 days the download link is replaced with the label **Expired** and you can no longer download the report. For more information about error reports, see [Reports](#).

## 16. 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** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
  - **Priority** - select a priority from the dropdown for the objects scheduled for migration with this task. Values are: **Highest**, **High**, **Medium**, **Low** and **Lowest**. The default priority is **Medium**. If the system is busy, the objects are queued (Migration state = Queued). When the system accepts new migration work, objects are taken from the queue based on the assigned priority and age in the queue.
- b. Click **Next**.

## 17. Summary

- a. **Save task settings as a migration template** - select this option to save the settings in this wizard as a reusable migration template.
  - **Migration Template Name** - specify a name for the template. If you have changed the settings of a preselected template, specify the same template name to apply the changes to the template when you complete the wizard. All saved templates are displayed in the [Templates](#) tab.
- b. Verify the task specifications as described below:
  - **Name** - name of the task. You can specify a custom name. The default name is **Migrate Teams**.
  - **Source tenant** - name of the tenant in this project.
  - **Target tenant** - name of the target tenant in this project.
  - **Scheduled start** - date and time when the task will start. **Now** indicates that the task will start immediately.
  - **Priority** - select a priority from the dropdown for the objects scheduled for migration with this task. Values are: **Highest**, **High**, **Medium**, **Low** and **Lowest**. The default priority is **Medium**. If the system is busy, the teams are queued (Migration state = Queued). When the system accepts new migration work, teams are taken from the queue based on the assigned priority and age in the queue.
- c. 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 from the **Tasks** tab, view the summary on the Dashboard or monitor alerts and notifications from the **Events** tab.



**IMPORTANT:** The task state in the task list indicates the progress of this task. **Completed** state means this task processing is completed. If the migration has any errors, the status column in the *Teams List View* will indicate **Migration partially failed**.

## Remigration

To remigrate messages, planner tasks and files, start a new teams migration task and follow the steps outlined in [Migrating Microsoft Teams](#). Select whether to migrate messages with attachments from the various options.



### NOTE:

- Do not reuse a previous migration task because the task options you need may be different.
- See [What We Migrate](#) to review the Teams objects that are supported.
- An incremental query is used automatically to find messages, tasks and files that were added or changed.
- The initial synchronization must have completed successfully for the incremental synchronization to succeed.
- Perform a remigration before you switch from the source to the target tenant.
- Do not delete teams in the target tenant after migration.
- Content that is updated or deleted in the source tenant cannot be synchronized with the target tenant during remigration. Here are some examples
  - A migrated message get deleted in the source. During remigration, the corresponding migrated message in the target will not be deleted.
  - A migrated message get updated in the source. During remigration, the corresponding migrated message in the target will not be updated.
  - A migrated Planner task's status gets updated in the source. During remigration, the corresponding Planner task's status in the target will not be updated.

## Messages

Messages that were previously migrated successfully will not be remigrated. Messages are remigrated as follows:

- New messages that are added since the last synchronization will be migrated.
- Messages that were partially migrated, for example the attachment was unavailable during a previous migration, will be migrated. Updates to these messages by users in the target tenant will not be overwritten.

## Planner Tasks

Planner Tasks in the target tenant that are created or updated will not be impacted. Planner Tasks from the source tenant will be remigrated as follows:

- Previously migrated Planner Tasks that are updated on the source tenant will not be migrated to the target tenant.
- New Planner Tasks will be migrated to the target tenant.

## Files

Previously migrated list items and files with the same name and ID will be remigrated from the source tenant as follows:

- Updates on source will be migrated to the target.
- Updates to target will be overwritten by the remigrated source items or files.

When Teams files are remigrated an incremental query retrieves files that have been added or changed in the channels since the last synchronization. Follow the steps outlined in [Migrating Microsoft Teams](#) and select **Migrate messages and files**.

# Renaming and Mapping Teams and Groups

You can rename and map teams and M365 groups, or rename, map and merge one or more source teams (or M365 group) to a specific team (or M365 group) in the target tenant in two ways:

- [Renaming and mapping teams and groups automatically](#)
- [Renaming and mapping teams and groups manually from a file](#)

## Renaming and Mapping Teams and Groups 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 **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click **Teams** from the project tiles, or click **Open** from the Teams tile to open the *Teams* dashboard.
5. Click the **Teams** tab or the **M365 Groups** tab and select one or more teams or groups that you want to rename and map.
6. Click **More** and then click **Rename and Map**. The *New Teams & Groups Rename and Map Task* wizard starts. Each step is described below:
7. **Mapping options**
  - a. Enter the information as described below:
    - **Add prefix** - specify a prefix for the team or group name. Whitespaces are not supported.
    - **Add suffix** - specify a suffix for the team or group name. Whitespaces are not supported.
  - b. **Rename mail nick name** - select this option to add a prefix or suffix to the target team or group.
  - c. Click **Next**.
8. **Notification**
  - a. **Send notification email once the task is completed** - select this option to send a notification email when a mapping task completes.
    - **Only in a case of failure** - select this option to send the email if the mapping task fails to complete successfully.
  - b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
  - c. Click **Next**.
9. **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** - task runs immediately.
    - **Run later** - task must be started manually.
    - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.

- b. Click **Next**.
10. **Summary**
  - a. Verify the task specifications as described below:
    - i. **Name** - name of the task. You can specify a custom name. The default name is **Rename and Map Task**.
    - ii. **Source tenant** - name of the tenant in this project.
    - 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 task is created. You can track its progress from the **Tasks** tab, view the summary on the *Dashboard* or monitor alerts and notifications from the **Events** tab.

## Mapping, Renaming and Merging Manually from a File

To rename Microsoft 365 groups or merge one or more source groups to a specific group in the target tenant, a CSV file is used to indicate the mapping between source and target groups as described below.

### To creating a mapping file:

1. Prepare a comma-separated values (CSV) file with the source and target group names.
 

**i** **TIP:** Export selected groups to a comma-separated values (CSV) and then edit this file. See [Exporting Groups](#) for more details.
2. The header row defines the names of the source and target attribute used for mapping. Subsequent rows list the mapping values of the attributes.  
The columns are as follows:
  - **Source Mailnickname** - unique name of the source group. The following column header variations are supported: SourceMailNickname, Source MailNickname, Source MailNickName. The column header is case sensitive.
  - **Target Mailnickname** - unique name of the target group. The following column header variations are supported: TargetMailNickname, Target MailNickname, Target MailNickName. The column header is case sensitive. You can merge multiple source groups to a single target group when you specify the same **Target Mailnickname** in a mapping file.
  - **Target Group Name** - display name of the target group. The column header is case sensitive.

	A	B	C	
1	Source Mailnickname	Target Mailnickname	Target Group Name	
2	Corporate	CompanyNews	Company News	Example 1
3	StarMarketing	GalaxyMarketing	Galaxy Marketing	Example 2
4	StarEvents	GalaxyEvents	Galaxy Marketing	
5	TeamSales	GalaxySales	Galaxy Sales Group	Example 3
6	GlobalSales	GalaxySales	Galaxy Sales Group	
7	SalesMembers	GalaxySales	Galaxy Sales Group	

**Example 1:** Row 2: Simple change of name.

The source group display name and mailnickname are changed.

**Example 2:** Rows 3 and 4: Different target groups with the same display name.

The Target Mailnicknames are different but the Target Group Names are the same. The Target Mailnickname takes precedence and the groups will be mapped to distinct target groups but the display name of each target group will be the same. It is recommended that you use unique display names to avoid confusion.

**Example 3:** Rows 5, 6 and 7: Merge multiple source groups with the same target group.

The Target Mailnickname is the same. The source groups will be merged with the same target group with the specified display name.

3. Save the CSV file.

**NOTE:** File names with non-ASCII characters are not supported.

#### To upload a mapping file:

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click **Teams** from the project tiles, or click **Open** from the Teams tile to open the *Teams* dashboard.
5. Click the **M365 Groups** tab.
6. Click **More > Map from File**. The *New Mapping from File Task* wizard starts. Each step is described below:
7. **Mapping file**
  - a. Click **Browse** and select the CSV mapping file. The selected file name appears next to the **Browse** button.
  - b. Click **Next**.
8. **Notification**
  - a. **Send notification email once the task is completed** - select this option to send a notification email when a mapping task completes.
    - **Only in a case of failure** - select this option to send the email if the mapping task fails to complete successfully.
  - b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple

recipient email addresses separated by semicolon.

- c. Click **Next**.

#### 9. **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** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- b. Click **Next**.

#### 10. **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 in this project.
  - 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 task is created. You can track its progress from the **Tasks** tab, view the summary on the Dashboard or monitor alerts and notifications from the **Events** tab.

## Discovering Chats

On Demand Migration for Teams helps you discover and migrate **Chats** between one or more matched users from a source tenant to a target tenant.

In this topic:

- [Prerequisites](#)
- [Starting a Chats Discovery Task](#)
- [Reviewing the Chats Discovery Task](#)
- [Reviewing the Chats Discovery Task Events](#)
- [Deleting inactive users](#)

### Prerequisites

User accounts in the source tenant must be matched with user accounts in the target tenant. If new users are added to the source tenant after the Chats discovery task completes, you must match the new users and then rerun another Chats discovery task. For more information about matching user accounts, see [Matching Accounts](#).

## Starting a Chats Discovery Task

The Chats discovery task returns all matched user accounts with chats.



**NOTE:** Chats discovery can also return the number of chats and the most recent activity within the last 30 days. To activate this capability, you must configure Microsoft 365 for the source tenant, as described below:

1. In Microsoft 365 admin center of the source tenant, go to **Settings > Org Settings** and open the **Services** tab.
2. Select **Reports**, and clear the check box **Display concealed user, group, and site names in all reports**. This setting gets applied both to the usage reports in Microsoft 365 admin center and Teams admin center.
3. Click **Save changes**.

### To discover 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 **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **Teams** tile, or click **Open** from the Teams tile to open the *Teams* dashboard.
5. Select the **Teams** tab and then select the **Chats** tab.
6. From the local toolbar, select **Discover**. The *New Chats Discovery Task* wizard starts. Each step is described below:
7. **Description**
  - a. Read only. The Chats discovery task will list all user accounts that are matched with a user in the target tenant.
  - b. Click **Next**.
8. **Notification**
  - a. **Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
    - **Only in a case of failure** - select this option to send the email if the discovery task fails to complete successfully.
  - b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
  - c. Click **Next**.
9. **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** - task runs immediately.
    - **Run later** - task must be started manually.
    - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
  - b. Click **Next**.



## 10. Summary

- a. Verify the task specifications as described below:
  - i. **Name** - name of the task. You can specify a custom name. The default name is **Discover chats**.
  - 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. For example, **Now** indicates that the task will start immediately after you complete the wizard.
- b. Click **Back** to revise or review a previous step.
- c. Click **Finish** to complete the task wizard. The task will start as scheduled.

## Reviewing the Chats Discovery Task

1. Open 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. **State** - 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. For example, **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.

## Reviewing the Chats Discovery Task Events

1. Open 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** - name of the user account if applicable.
  - 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.

## Deleting inactive users

You can delete inactive users from the Chats list view to prevent the migration of the inactive user's personal chats.

### ***To delete inactive users***

1. Select one or more users in the list view that you want to delete.
2. Click **More > Delete**.
3. Click **Yes** in the *Delete Objects* popup to confirm the action.

# Managing Chats with Collections

Migrating large numbers of chats requires careful planning. Organize the user accounts into collections to make large chat lists more manageable.

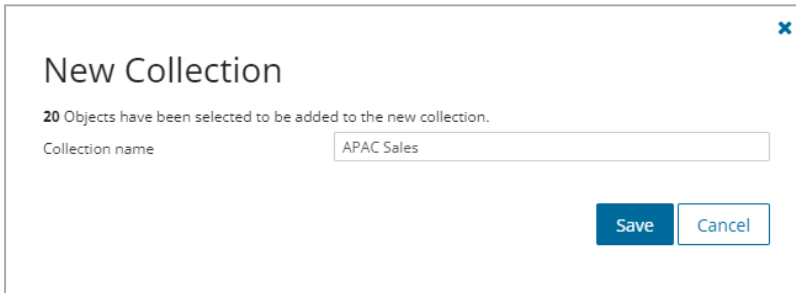
## Adding chats to Collections

You can add user accounts with chats to collections in three ways:

- [Select the user accounts and create a new collection](#)
- [Select the user accounts and add to an existing collection](#)
- [Use a CSV file to create one or more chat collections](#)

### **To add selected user accounts to a new collection:**

1. From the project dashboard, click **Open** in the Teams tile to open the *Teams* workspace.
2. Open the **Chats** tab and select the user accounts that you want to add to a collection.
3. From the actions toolbar, click **New Collection**. The *New Collection* dialog opens.

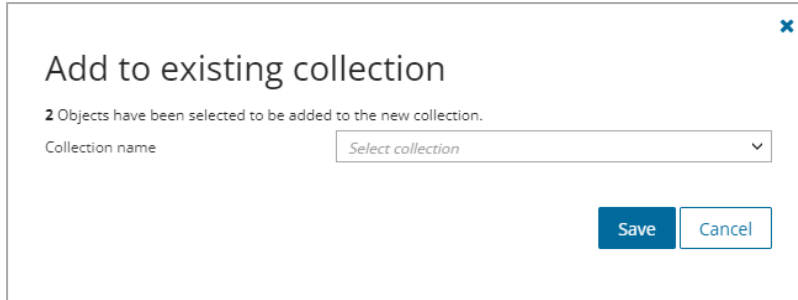


4. Enter a collection name in the **Collection name** field and click **Save** to add the selected user accounts to the collection.

### **To add selected user accounts to an existing collection:**

1. From the project dashboard, click **Open** in the Teams tile to open the Teams workspace.
2. If you need to create a new collection:
  - a. From the top-right corner of the workspace, click **Select Collection > + New Collection**
  - b. Enter a collection name and click **Save** to add this collection to the project.
3. Open the **Chats** tab and select the user accounts that you want to add to the collection.

- From the actions toolbar, click **Add to Collection**. The *Add to existing collection* dialog opens.

A dialog box titled "Add to existing collection" with a close button (X) in the top right corner. Below the title, it says "2 Objects have been selected to be added to the new collection." There is a label "Collection name" followed by a dropdown menu with the text "Select collection" and a downward arrow. At the bottom right, there are two buttons: "Save" (in blue) and "Cancel" (in white with a blue border).

- Select your collection from the **Collection name** dropdown and click **Save** to add the selected user accounts to the collection.

### To create one or more collections with a CSV file:

This is a two-step process as described below:

#### Prepare the CSV file



**NOTE:** Using a CSV file provides the following additional benefits:

- Multiple collections can be created with the same CSV file.
- Existing collections can be specified in the CSV file to add additional user accounts
- Accounts can be listed in multiple collections

Use the format shown below to prepare the CSV file. The minimal set of columns required are shown.



**TIP:** You can export the selected user accounts to a CSV file and then add the **Collection** column and retain the **Source UPN** column. All other columns in the exported CSV file will be ignored so you can remove those columns if you want.

	A	B
1	Collection	Source UPN
2	APAC Sales	AlexW@sourcecorp.onmicrosoft.com
3	APAC Sales	JoniS@sourcecorp.onmicrosoft.com
4	APAC Sales	DiegoS@sourcecorp.onmicrosoft.com
5	Marketing	LynneR@sourcecorp.onmicrosoft.com
6	Marketing	IsaiahL@sourcecorp.onmicrosoft.com
7		

- Collection** - Column header for the collection name
- Source UPN** - User Principal Name (UPN) of the source account.

#### Import the CSV file

- Log in to Quest On Demand and choose an organization if you have multiple organizations.
- From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
- Create a new project or open an existing project.
- Click the **Teams** tile, or click **Open** from the Teams tile to open the *Teams* workspace.

5. Open the **Chats** tab.
6. From the actions toolbar, click **More > Import Collections**. The *Import Collections from File* dialog opens.
7. Select **Chats** from the *Specify kind* dropdown.
8. Click **Browse** and select the CSV file. The selected CSV file name appears.
9. Click **Import**.



**NOTE:** If a collection in the CSV does not exist, a new collection will be created with the name specified in the CSV.

**To verify the addition of the chat to a collection:**

1. Check the **Collections** column in the Chats List View that indicates the most recent collection where the group has been added and the number of additional collections that also contain the chat.
2. Select a chat from the Chats List View to open the Chat Detail pane. Check the **Collections** property that lists all the collections where the chat has been added.

## Migrating Chats

In this topic:

- [Reviewing migration readiness](#)
- [Considerations](#)
- [Starting a Chats Migration Task](#)
- [Reviewing the migration results](#)
- [Recreating Conversation History Links](#)
- [Troubleshooting](#)

### Reviewing Chats Migration Readiness



**NOTE:** Chat migrations are heavily throttled by Microsoft on source and target tenants. As a result, migration throughput performance is very difficult to predict. Quest recommends migrating the last 15 or 30 days of messages during the last phase of migrations. Use a separate migration task to archive *some or all* of the remaining messages for users who require the messages for regulatory or business reasons.

Migration speed for chat messages may decrease with larger data volumes. Quest recommends purchasing Chat add-on licenses which are faster because archiving all remaining messages could take a considerable amount of time.

Use the following information in the **Chats** list view to support your decision.

Property	Value	Description
Workflow	Discovered	On Demand has discovered the chat.
OneDrive Status	Completed	The OneDrive migration service has migrated the files for this user. This must be completed for On Demand to migrate chats for this user. You

Property	Value	Description
		can migrate OneDrive file sharing permissions before or after the Chats migration.
Mailbox Status	Migrated	User mailbox migration is complete and successful.

In addition to the information that you reviewed, verify the following:

- The temporary Migration Service accounts for source and target tenants that you will use to migrate Teams Chat should be granted the Teams license. You should not change your temporary Migration Service accounts before completing the migration project.
- The temporary Migration Service accounts should be granted the **Global Administrator** or **Teams Administrator** role on the tenants for which these account are used.
- [optional] Verify that you have Microsoft Teams Private Chat licenses. Check Settings > Subscriptions.

## Considerations

- OneDrive accounts must be provisioned in the target tenant.
- It is a best practice to migrate Chats after all the content like OneDrive, Mailboxes, SharePoint, Teams, etc., is migrated and the user accounts are matched.
- During migration, the migration task will migrate any new messages added to Chats after completing a Discovery task.
- Chats can be migrated multiple times. During remigration, new messages are added to previously migrated live chats in the target, and new chats that were not migrated before are migrated.
- When you select the **Archive remaining messages** option in the **Migration Actions** step of the *New Chats Migration Task* wizard, the chat archive file will be uploaded to an available OneDrive of a chat participant, and shared with other participants. During the process, Microsoft 365 will send a notification email to the owner of the file.
- Due to Microsoft API limitations, the discovery task is automatically run for all users during a remigration to discover new messages and new chats. Which is why we don't recommend remigration for small users sets.

## Starting a Chats 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 **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click **Teams** from the project tiles, or click **Open** from the Teams tile to open the *Teams* workspace.
5. Select the **Chats** tab and select the user accounts whose chats you want to migrate.
6. Select **Migrate** from the action ribbon. The *New Chats Migration Task* wizard starts. Each step is described below:
7. **Start**
  - a. **Task Name** - You can specify a custom name. The default name is **Migrate chats**.
  - b. **Use the settings from an existing migration template for this task** - select this option if you have already saved a previous migration templates. if this is the first time you are migrating mailboxes, keep this option unchecked.

- **Select template** - select a template that you previously created, from the dropdown list.
- c. **Go to Summary step** - select this option to preserve the settings and go directly to the last step of the wizard. If you do not select this option, but you have selected a template, you can step through the wizard and edit the settings in the template.
- d. Click **Next**.

## 8. Migration Options

**New Chats Migration Task**

Start ☒ Migration Options Migration Actions Notification Reporting Schedule Summary

Select this option to migrate chats with unmatched or deleted users.

☒ Migrate chats with unmatched or deleted users

Select this option to migrate Chat messages irrespective of the value of the OneDrive Status column in the Chats list view. This can be used when OneDrive accounts are migrated by tools other than On Demand Migration. 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.

☐ Skip OneDrive status check

Select this option to skip migration of external users in chats. If unselected, external users will get notifications during chat migration.

☒ Avoid adding external users to target chats in migration

Step 2 of 7

Back Next Finish Cancel

- a. Select one or more options as described below:
- **Migrate chats with unmatched and deleted users** - select this option to migrate the chats with users that have not been matched with a user the target tenant, or deleted in the source tenant because they have left the organization. The information about the user from the source tenant is used to migrate the chat.  
If this option is not selected, chats that include unmatched or deleted users will not be migrated. For example, if John chats with Dave, and Dave's user account has deactivated because he left the organization, then any chat with user Dave will not be migrated.
  - **Skip OneDrive status check** - select this option to migrate Chat messages irrespective of the value of the **OneDrive Status** column in the Chats list view. This is helpful because OneDrive accounts could be migrated by tools other than On Demand Migration, and the **OneDrive Status** column indicates *New* instead of *Completed*. 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.
  - **Avoid adding external users to target chats** - select this option to avoid adding external users to the chats that are migrated to the target tenant. If this option is not selected, external users will be added to the migrated chat and they will receive unwanted notifications.
- b. Click **Next**.

## 9. Migration Actions

New Chats Migration Task

Start ✓

Migration Options ✓

Migration Actions

Notification

Reporting

Schedule

Summary

☒ Migrate to live chat ⓘ

☒ Messages within last 15 days

☐ Messages within last 30 days

☐ Messages within last 60 days

☒ Archive remaining messages ⓘ

☒ Last 30 days of remaining messages

☐ Last 60 days of remaining messages

☐ Last 90 days of remaining messages

☐ All remaining messages

☐ Create private chat with link to archived messages file ⓘ

☐ Rearchive and overwrite the target chat archived file if the chat was archived before ⓘ

☐ Use additional Team Chats licenses for faster archiving ⓘ

Step 3 of 7

Back Next Finish Cancel

a. Select one or more action options as described below:

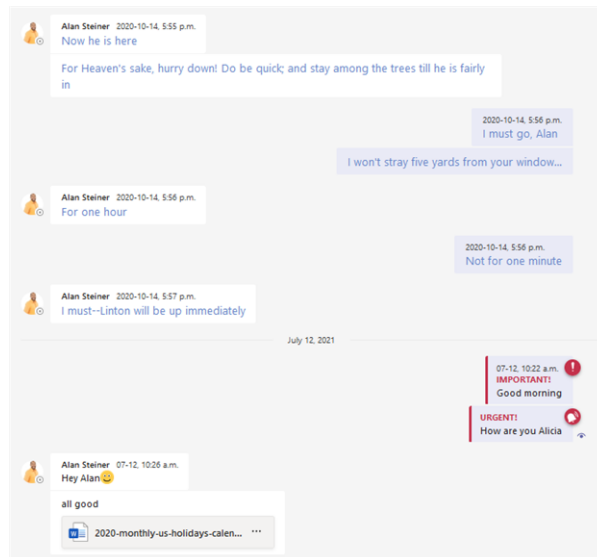
i. **Migrate to live chat** - select this option to migrate all or a subset of the chat messages from the source tenant to the live chat in the target tenant. You choose a subset or all messages based the date range option as defined below:

- **Messages within last 15 days** - the most recent chats within the last 15 days discovered after the last migration will be migrated.
- **Messages within last 30 days** - the most recent chats within the last 30 days discovered after the last migration will be migrated.
- **Messages within last 60 days** - the most recent chats within the last 60 days discovered after the last migration will be migrated.

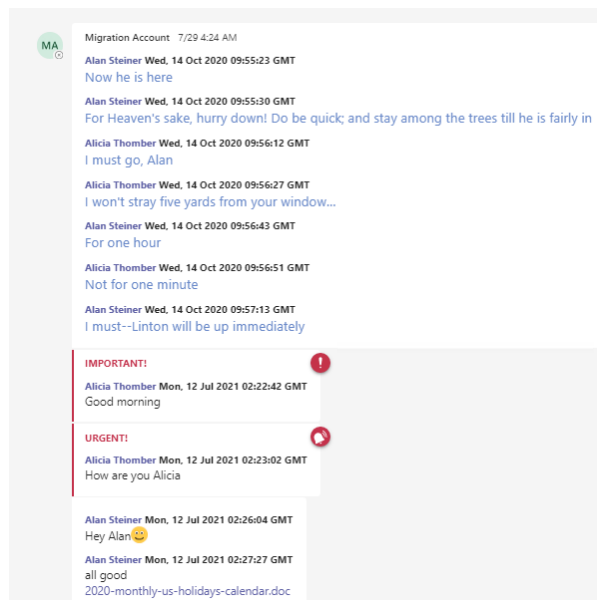
Messages are merged into manageable sets and then migrated. The effect of merging messages is described in the example below:

Consider a set of original messages in the source tenant as shown below:





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.



- ii. **Archive remaining messages** - select this option to archive the rest of the chat messages. These messages are archived as an HTML file and are uploaded to an available OneDrive selected from chat participants. Permission to view the HTML file is granted to other chat participants.

**i** **NOTE:** Chat migrations are heavily throttled on source and target tenants. Migration throughput performance is very difficult to predict. Quest recommends migrating the last 15 or 30 days of messages during the last phase of migrations. Use a separate migration task to archive some or all of the remaining messages for users who require the messages for regulatory or business reasons.

You can exercise greater granular control over the remaining messages using the time-range options described below:

- **Last 30 days of remaining messages** - the most recent 30 days of messages that remain to be migrated will be archived.
- **Last 60 days of remaining messages** - the most recent 60 days of messages that remain to be migrated will be archived.
- **Last 90 days of remaining messages** - the most recent 90 days of messages that remain to be migrated will be archived.
- **All remaining messages** - all messages that remain to be migrated will be archived.

Additional options:

- **Create private chat with link to archived messages file** - selecting this option creates a private chat message in the target tenant with the members of the original chat. The chat message contains a link to the archived messages (HTML) file that is uploaded to the *Microsoft Teams Chat Files* folder on an available OneDrive selected from chat participants. Clearing this option creates the archived messages (HTML) file with appropriate permissions without a private chat message.

The archived messages file appears in the OneDrive with the naming convention:  
<chat name or first 3 member names> + current date + random number + <-archivedchat.html>

The link is named `Conversation History`.

**i** **NOTE:** If there are changes to the target users' domain, UPN, alias etc., then the archive link to the archived file will not work. To recreate the link in the migrated chat, use the [New Recreate Conversation History Link Task wizard](#).

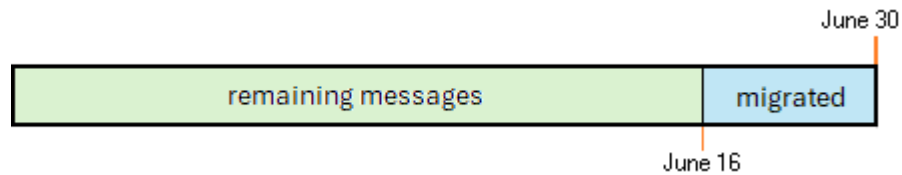
- **Use additional Team Chats licenses for faster archiving** - select this option to increase the throughput for archiving remaining chat messages.
  - This option is displayed when
    - additional chat licenses are detected, and
    - **Migrate to live chat** option is not selected.

**i** **TIP:** Migration speed for chat messages may decrease with larger data volumes. If you want to migrate live chats and use additional chat licenses to faster archiving, then start two separate chat migration tasks: one task for migrating live chats, and the other task for fast archiving with additional licenses.

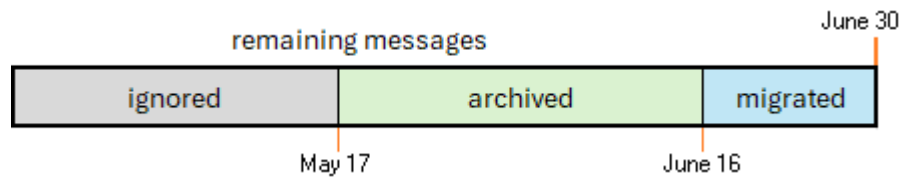
- **Rearchive and overwrite the target chat archived file if the chat was archived below** - select this option to rearchive and overwrite any previously archived chat file in the target tenant. This option will respect the time-range selected in previous options.

**Example 1:** Assume that you are migrating chats on June 30.

If you select **Migrate to live chat** and **Messages within 15 days**, then all chat messages from June 16 to June 30 will be migrated to the live chat in the target tenant.



If you also select **Archive remaining messages** and **Last 30 days of remaining messages**, any remaining chats from May 17 to June 15 will be archived as an HTML file in the target tenant. Chats before May 17 will not be migrated.



If you also select **Create private chat with link to archived messages file**, a chat message with a link named *Conversation History* is created in the chat that links to the archived HTML file.

**Example 2:** Assume that you migrated and archived chat messages previously on June 30 and are migrating chats again on July 5.

If you select **Migrate to live chat** and **Messages within 15 days**, only new chats discovered after June 30 (July 1 to July 5) will be migrated to the live chat in the target tenant because migration service remembers the previous migration. Chats from June 21 (last 15 days) to June 30 (previous migration date) cannot be remigrated to the live chat.



If you also select **Archive remaining messages** and **All remaining messages** no chat messages will be archived because you cannot archive any messages before June 30 even though there could be messages remaining that were not previously archived.



b. Click **Next**.

## 10. Notification

- a. **Send notification email once the task is completed** - select this option to send a notification email when a migration task completes.
  - **Only in a case of failure** - select this option to send the email if the migration task fails to complete successfully.

- b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
  - c. Click **Next**.
- 11. **Reporting**

Select the check box **Generate detailed report of migration errors** to generate a migration error report when you run the migration task.

You can download the report from the **Reports** tab of the *Teams* workspace by clicking the **Download** link in the **Error Log** column. If there are no migration errors, a download link is not available. Error reports are retained for 30 days. After 30 days the download link is replaced with the label **Expired** and you can no longer download the report. For more information about error reports, see [Reports](#).
- 12. **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** - task runs immediately.
    - **Run later** - task must be started manually.
    - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
    - **Priority** - select a priority from the dropdown for the objects scheduled for migration with this task. Values are: **Highest**, **High**, **Medium**, **Low** and **Lowest**. The default priority is **Medium**. If the system is busy, the objects are queued (Migration state = Queued). When the system accepts new migration work, objects are taken from the queue based on the assigned priority and age in the queue.
  - b. Click **Next**.
- 13. **Summary**
  - a. **Save task settings as a migration template** - select this option to save the settings in this wizard as a reusable migration template.
    - **Migration Template Name** - specify a name for the template. If you have changed the settings of a preselected template, specify the same template name to apply the changes to the template when you complete the wizard. All saved templates are displayed in the [Templates](#) tab.
  - b. Verify the task specifications as described below:
    - a. **Name** - name of the task. You can specify a custom name. The default name is **Migrate chats**.
    - b. **Source tenant** - name of the source tenant for the chats.
    - c. **Target tenant** - name of the target tenant where the chats will be migrated.
    - d. **Scheduled start** - date and time when the task will start. For example, **Now** indicates that the task will start immediately after you complete the wizard.
  - c. Click **Finish** to complete the task wizard. The task will start as scheduled.

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

## Reviewing the Migration Results

Once the migration task is complete, use the information on the **Chats** tab to verify the success of the migration. The column in the chats migration list view are as follows:

- **User Name** - name of the user from the source tenant.
- **Migration State** - status of the task in the migration process. Values are as listed below:
  - Discovered
  - Migrating
  - Partially migrated
  - Partially migrated with issues
  - Migrated
  - Migrated with issues
  - Migration failed
- **Workflow** - the most recent operation performed on the group. Valid values are
  - 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.
- **Migrated Chats** - 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.
- **Archived Chats** - indicates whether or not chats have been archived. When chats are migrated and archived, the value changes to **Yes** for the selected user. Since chats can be archived only once, if you attempt to re-archive migrated chats, a warning message appears in the migration task events.
- **Source UPN** - UserPrincipalName (UPN) of the source account.
- **Target UPN** - UserPrincipalName (UPN) of the target account.

## Recreating Conversation History Links

When there are changes to the target domain due to a domain move, changes to user UPNs, aliases etc., the link to the archived file in private chats that are migrated to the target tenant will not work. To recreate the link in the migrated chat, use the *New Recreate Conversation History Link Task* wizard as described below:

**i** **NOTE:** The task can only recreate links for chats which were archived with the **Create private chat with link to archived messages file** option in the *New Chats Migration Task* wizard.

1. Select the **Chats** tab.
2. Select **More > Recreate Conversation History Link** from the *Actions* menu. The *Recreate Conversation History Link Task* wizard starts. Each step is described below:
3. **Description**
  - a. Click **Next**.

#### 4. Notification

- a. **Send notification email once the task is completed** - select this option to send a notification email when a migration task completes.
  - **Only in a case of failure** - select this option to send the email if the migration task fails to complete successfully.
- b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
- c. Click **Next**.

#### 5. 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** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
  - **Priority** - select a priority from the dropdown for the objects scheduled for migration with this task. Values are: **Highest**, **High**, **Medium**, **Low** and **Lowest**. The default priority is **Medium**. If the system is busy, the objects are queued (Migration state = Queued). When the system accepts new migration work, objects are taken from the queue based on the assigned priority and age in the queue.
- b. Click **Next**.

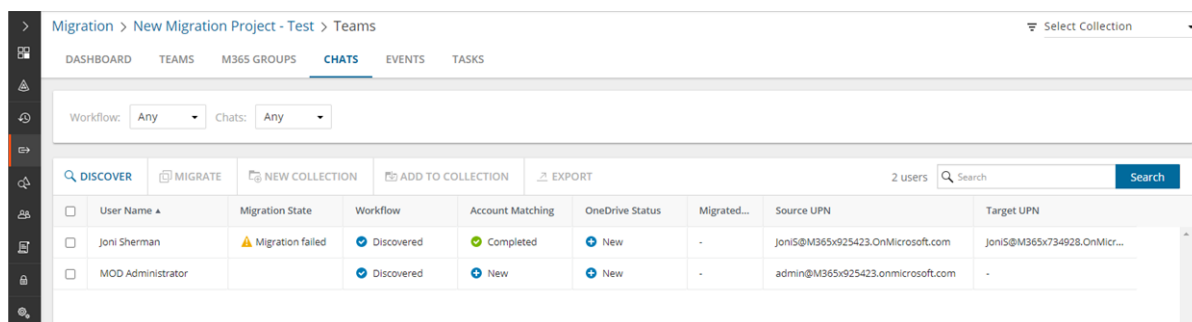
#### 6. Summary

- a. Verify the task specifications as described below:
  - a. **Name** - name of the task. You can specify a custom name. The default name is **Recreate Conversation History Link**.
  - b. **Source tenant** - name of the source tenant.
  - c. **Target tenant** - name of the target tenant.
  - d. **Scheduled start** - date and time when the task will start. For example, **Now** indicates that the task will start immediately after you complete the wizard.
- b. Click **Finish** to complete the task wizard. The task will start as scheduled.

## 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.

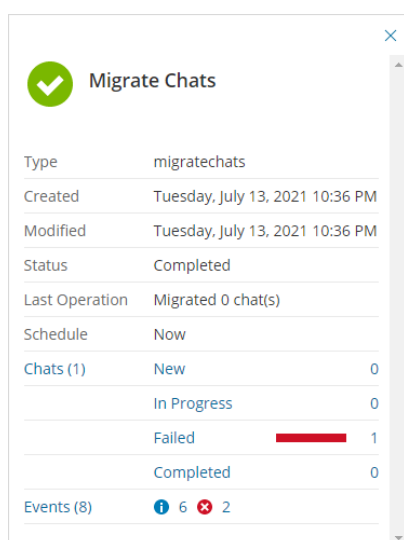


The screenshot shows the 'Migration > New Migration Project - Test > Teams' interface. The 'CHATS' tab is selected. A table lists migration details for two users: Joni Sherman and MOD Administrator. Joni Sherman's migration failed, while MOD Administrator's migration was successful.

	User Name	Migration State	Workflow	Account Matching	OneDrive Status	Migrated...	Source UPN	Target UPN
<input type="checkbox"/>	Joni Sherman	Migration failed	Discovered	Completed	New	-	JoniS@M365x925423.OnMicrosoft.com	JoniS@M365x734928.OnMicr...
<input type="checkbox"/>	MOD Administrator		Discovered	New	New	-	admin@M365x925423.onmicrosoft.com	-

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.

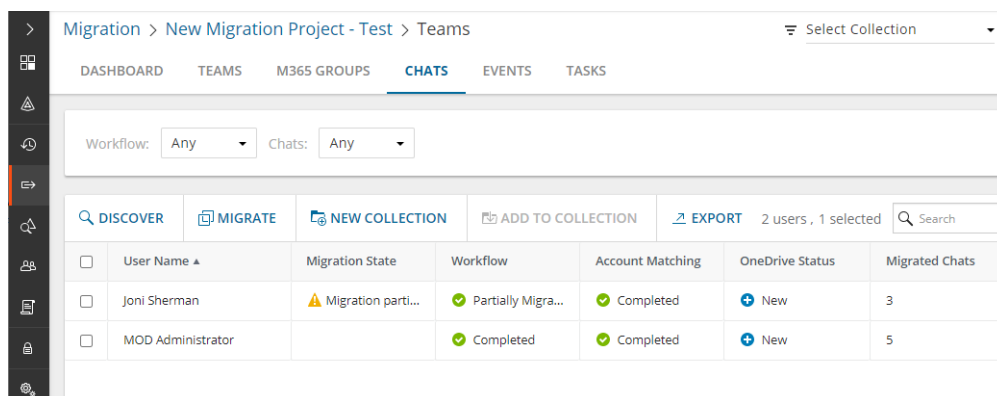


The 'Migrate Chats' window shows task details for a migration task. It includes a progress bar for 'Chats (1)' with a red segment indicating a failure. The 'Events (8)' section shows 6 information icons and 2 error icons.

Migrate Chats	
Type	migratechats
Created	Tuesday, July 13, 2021 10:36 PM
Modified	Tuesday, July 13, 2021 10:36 PM
Status	Completed
Last Operation	Migrated 0 chat(s)
Schedule	Now
Chats (1)	New 0
	In Progress 0
	Failed 1
	Completed 0
Events (8)	6 2

**Resolution:** When accounts are missing from the target tenant, you must map or migrate the account and rerun the chat migration task.

## Example 2: An error in a chat message prevents all subsequent chat messages from being migrated.



The screenshot shows the 'Migration > New Migration Project - Test > Teams' interface. It includes a sidebar with navigation icons, a top navigation bar with tabs for DASHBOARD, TEAMS, M365 GROUPS, CHATS, EVENTS, and TASKS. Below the tabs are filters for Workflow and Chats, both set to 'Any'. A toolbar contains buttons for DISCOVER, MIGRATE, NEW COLLECTION, ADD TO COLLECTION, and EXPORT, along with a search bar. The main content is a table with columns: User Name, Migration State, Workflow, Account Matching, OneDrive Status, and Migrated Chats. Two rows are visible: Joni Sherman and MOD Administrator.

<input type="checkbox"/>	User Name ▲	Migration State	Workflow	Account Matching	OneDrive Status	Migrated Chats
<input type="checkbox"/>	Joni Sherman	⚠ Migration parti...	✔ Partially Migra...	✔ Completed	+ New	3
<input type="checkbox"/>	MOD Administrator		✔ Completed	✔ Completed	+ New	5

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 rerun 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 Microsoft 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](#).

The basic Microsoft 365 Groups (without associated Teams) migration process consists of the following steps:

#	Step
1	Create a new migration project or open an existing project.
2	Grant necessary permissions in case these permissions are not already granted.
3	Discover Microsoft 365 Groups (without associated Teams) in the source tenant. These groups are not provisioned in the target tenant at this stage.
4	Provision groups in the target tenant. <ul style="list-style-type: none"> <li>The temporary Migration Service account in the source tenant will be added to all source Microsoft 365 Groups as a member</li> <li>The temporary Migration Service account in the target tenant will be added to all migrated target Microsoft 365 Groups as a member and owner.</li> </ul> These accounts can be removed from groups after the migration is completed.
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 by tracking tasks and events.

## What We Migrate

The following content associated with Microsoft 365 Groups without Teams functionality can be migrated:

### Objects and content types

Object	Support	Notes
Group settings	✓	

Object	Support	Notes
Inbox folder and Calendar from the group mailbox	✓	this content is always migrated
OneDrive Shared Library	✓	OneDrive Shared Library must be created and associated with a group in the same SharePoint site.
Planner	✓	
SharePoint site	✓	the entire site is migrated

## Prerequisites



**NOTE:** These prerequisites are generic to all M365 Groups. See [Teams - Prerequisites](#) for prerequisites about M365 Groups that linked to Teams.

Verify the following requirements are met before migrating Microsoft M365 Groups. **If these actions are not performed, discovery, provision and migration tasks will fail or some data might be lost!**

The following consents must be granted before M365 Groups migration can be started

- **Migration - Basic**
- **Migration - Mailbox Migration**
- **Migration - SharePoint - Minimal** for the source tenant, and **Migration - SharePoint - Full** for the source and target tenants. **Migration - SharePoint** is a legacy permission set and should be replaced with either the Minimal or Full permission sets.
- **Migration - Teams - Minimal** for the source tenant, and **Migration - Teams - Full** for the source and target tenants. **Migration - Teams** is a legacy permission set and should be replaced with either the Minimal or Full permission sets.



**TIP:** If the consents are not granted or expired, **Discover Groups** 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 the **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.

- Accounts must be matched or migrated before migrating groups.
- 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.

### Required permissions

See the [On Demand Migration - Permissions Reference Guide](#) for details.

## Temporary Migration Service accounts

- It is recommended to create or use source and target temporary Migration Service accounts.
- The temporary Migration Service accounts should be granted the **Global Administrator** or **Teams Administrator** role on the tenants for which these account are used. The temporary Migration Service accounts in the source and target tenant should have Teams license from the [Microsoft 365 admin center](#).
- Do not change your temporary Migration Service accounts before completing the migration project.
- You must remove the source and target temporary Migration Service accounts for safety reasons after the migration is completed. These accounts can be removed from teams as described in [Finalizing the Migration](#).

The target temporary Migration Service account is used in (but not limited to) the following scenarios:

- It creates and owns the provisioned target M365 Groups.
- It is added to all target teams and Microsoft 365 Groups as a member and an owner.
- It is used to perform the M365 Groups migration.

# Discovering Groups

In this topic:

- [Discovering all groups](#)
- [Discovering groups from a file](#)
- [Reviewing the Discover Groups task](#)
- [Reviewing the Discover Groups task events](#)

## Discovering all groups

This is the simplest approach which uses the **Discover Groups** tasks to inspect the source tenant and discover all the Microsoft 365 Groups.

### ***To start the Discover Groups task:***

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **Teams** tile, or click **Open** from the Teams tile to open the *Teams* dashboard.
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 Groups > Discover All** from the *Actions* menu.
6. The *New Groups Discovery Task* wizard starts. Each step is described below:

## 7. Discovery Options

The screenshot shows a wizard window titled "New Groups Discovery Task" with a close button (X) in the top right corner. On the left is a sidebar with four steps: "Discovery Options" (highlighted with an orange bar), "Notification", "Schedule", and "Summary". The main area contains the text "Discover Microsoft 365 Groups provisioned in the source tenant". At the bottom left, it says "Step 1 of 4". At the bottom right are four buttons: "Back" (disabled), "Next" (active/highlighted), "Finish" (disabled), and "Cancel" (outlined).

- a. Click **Next**.

## 8. Notification

- a. **Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
  - **Only in a case of failure** - select this option to send the email if the discovery task fails to complete successfully.
- b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
- c. Click **Next**.

## 9. 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** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- b. Click **Next**.

## 10. Summary

- a. Verify the task specifications as described below:
  - i. **Name** - name of the task. You can specify a custom name. The default name is **Discover Groups**.
  - ii. **Source tenant** - name of the source tenant in this project.

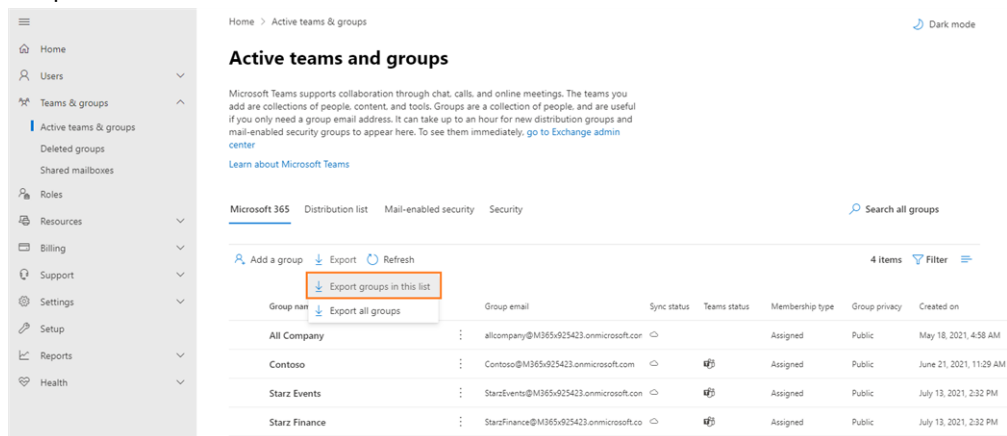
- iii. **Target tenant** - name of the target tenant in this project.
  - iv. **Scheduled start** - date and time when the task will start. Now indicates that the task will start immediately.
- b. Click **Back** to revise or review a previous step or click **Finish** to complete the task wizard and start the task as scheduled.

## Discovering Groups from a File

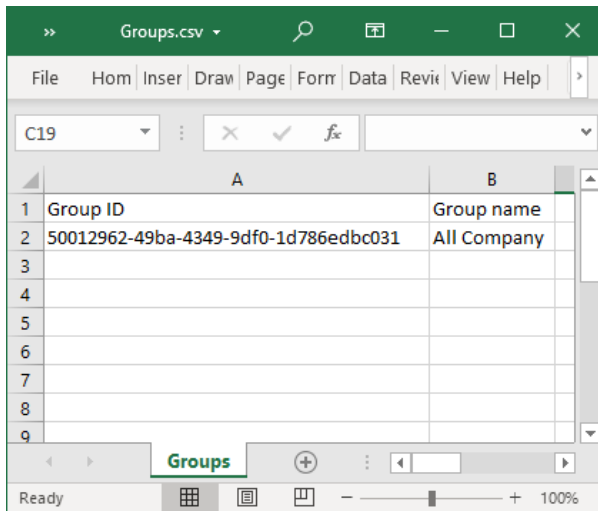
When you have a large set of groups but you want to migrate a subset of those groups, you can start the discovery process by using a CSV file. The CSV file lets you specify the groups that you want to discover and ignore the rest. This is a two-step process:

### Preparing 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.

### Starting the Discover Groups Task

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **Teams** tile, or click **Open** from the Teams tile to open the *Teams* dashboard.
5. Click the **M365 Groups** tab and select **List View** if not already selected. Then click **Discover Groups > Discover from file** from the *Actions* menu.
6. The *New Groups Discovery Task* wizard starts. Each step is described below:

## 7. Discovery Options

**New Groups Discovery Task**

Discovery Options  
Schedule  
Summary

Select a comma-separated values (CSV) file that contains the list of Microsoft 365 Groups to be discovered. Refer to the documentation for details about the file format.

[Browse...](#)

Select this option to start a Collect Statistics Task to count the Plans and Tasks in Groups.

☒ Collect Plan and Task statistics for Groups

**Note:** The Azure AD administrator account will be added to the discovered Groups.

Step 1 of 3

[Back](#) [Next](#) [Finish](#) [Cancel](#)

- a. Click **Browse** and select the CSV that contains the Group IDs and Group names of the groups that you want to discover.
- b. Click **Next**.

## 8. Schedule

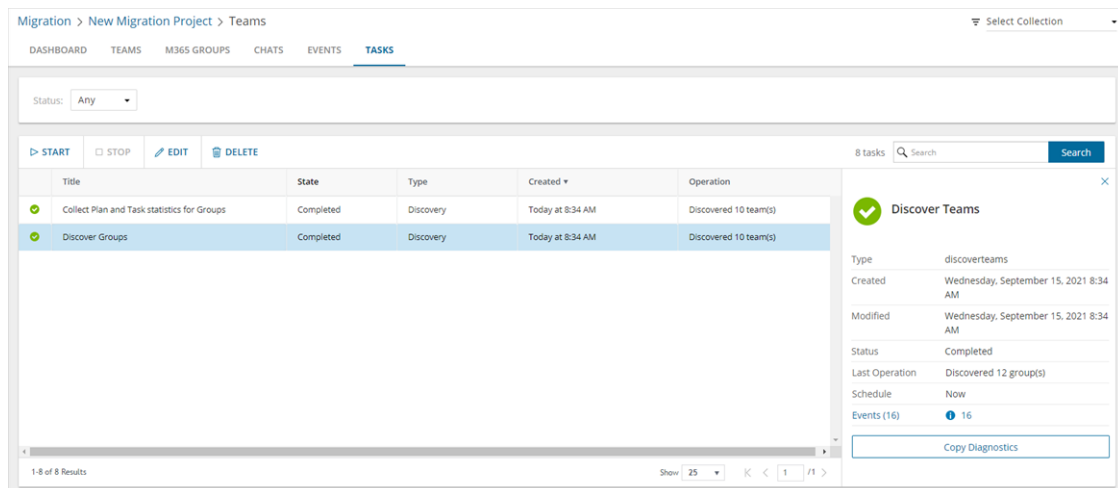
- a. Choose from one of three options to schedule the task. The scheduler will be activated only after you complete the task wizard.
  - **Run now** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- b. Click **Next**.

## 9. Summary

- a. Verify the task specifications as described below:
  - i. **Name** - name of the task. You can specify a custom name. The default name is **Discover Groups**.
  - ii. **Source tenant** - name of the source tenant in this project.
  - 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.

## Reviewing the Groups Discovery Task

1. Open 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. **State** - 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.



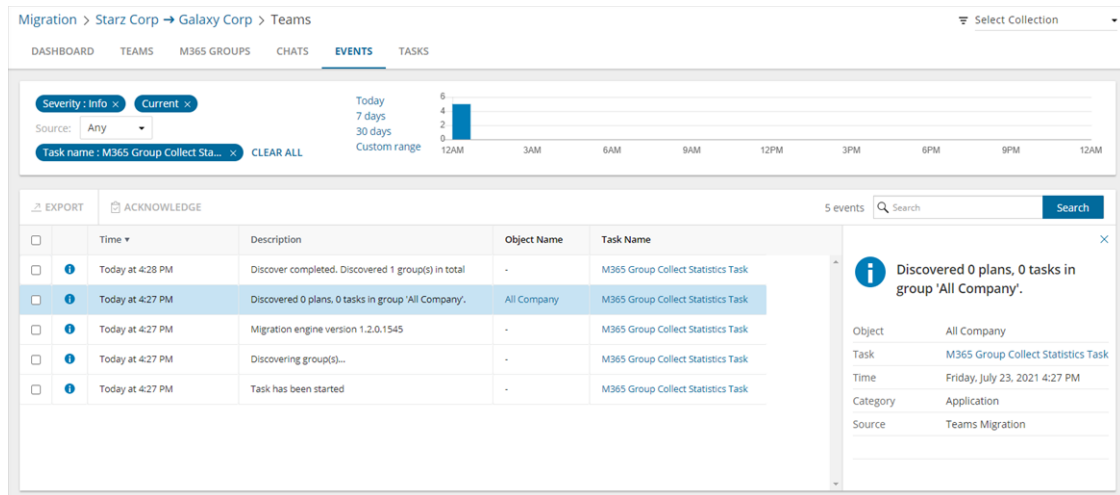
4. If you selected the option to collect statistics in the *New Groups Discovery Task* wizard, you will see and additional task for *Collect Plan and Task statistics for Groups*. Click the task to view the corresponding details in the details pane.

## Reviewing the Groups Discovery Task Events

1. Open 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:



- Object** - Name of the group.
- Task** - Name of the task.
- Time** - Date and time when the event occurred.
- Category** - Type of task. the value is Application.
- Source** - Name of the On Demand Migration service.



## 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:

- [Discovering all teams and groups](#)
- [Discovering teams and groups from a file](#)
- [Reviewing the Discover task](#)
- [Reviewing the Discover task events](#)

### Discovering all teams and groups

This is the simplest approach which uses the **Discover** tasks to inspect the source tenant and discover all the teams.

**To start the Discover task:**

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click **Teams** from the project tiles, or click **Open** from the Teams tile to open the *Teams* migration workspace.
5. Click **Discover > Discover All** from the Teams dashboard.
6. The *New Teams & Groups Discovery Task* wizard starts. Each step is described below:
7. **Discovery Options**

**NOTE:** The Azure AD administrator account will be added to the discovered Teams and Groups.

- 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. Click **Next**.
8. **Notification**
- a. **Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
    - **Only in a case of failure** - select this option to send the email if the discovery task fails to complete successfully.
  - b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
  - c. Click **Next**.

## 9. 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** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- b. Click **Next**.

## 10. Summary

- a. Verify the task specifications as described below:
  - i. **Name** - name of the task. You can specify a custom name. The default name is **Discover**.
  - 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.

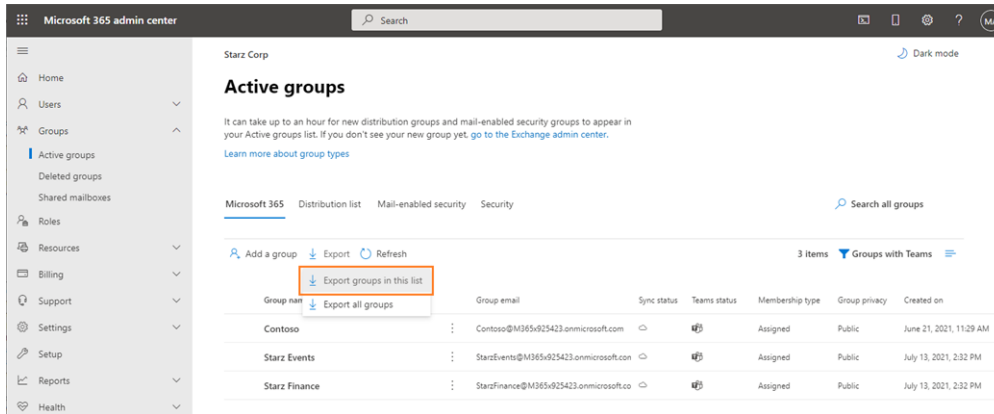
## Discovering teams and groups from a file

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.

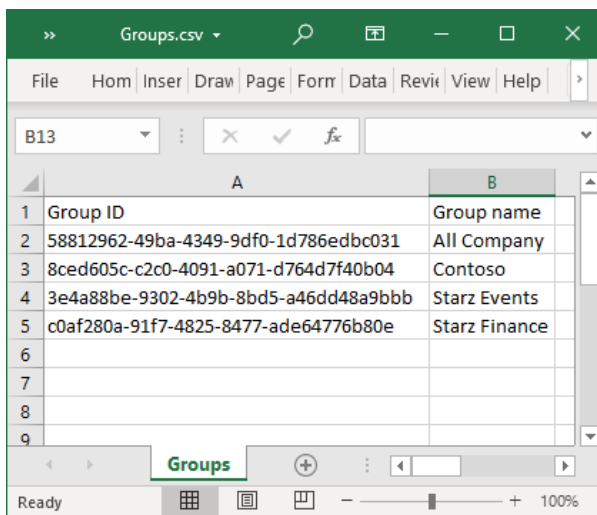
### *Preparing the CSV file*

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

- Click **Export** and then click **Export all groups**. A *Groups.csv* file will be downloaded to your computer.



- 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.



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

## Starting the Discover Task

- Log in to Quest On Demand and choose an organization if you have multiple organizations.
- From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
- Create a new project or open an existing project.
- Click **Teams** from the project tiles, or click **Open** from the Teams tile to open the *Teams* dashboard.
- Click **Discover > Discover from file** from the Teams dashboard.
- The *New Teams & Groups Discovery Task* wizard starts. Each step is described below:

## 7. Discovery Options

New Teams & Groups Discovery Task

Discovery Options  
Notification  
Schedule  
Summary

Select a comma-separated values (CSV) file that contains the list of Microsoft 365 Groups and Teams to be discovered. Refer to the documentation for details about the file format.

Browse...

Step 1 of 3

Back Next Finish Cancel

- a. Click **Browse** and select the CSV that contains the Group IDs and Group names of the teams that you want to discover.
- b. Click **Next**.

## 8. Notification

- a. **Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
  - **Only in a case of failure** - select this option to send the email if the discovery task fails to complete successfully.
- b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
- c. Click **Next**.

## 9. 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** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- b. Click **Next**.

## 10. Summary

- a. Verify the task specifications as described below:
  - i. **Name** - name of the task. You can specify a custom name. The default name is **Discover**.
  - 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.

## Reviewing the Discover Task

1. Open 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. **State** - 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.

The screenshot shows the 'Migration > New Migration Project > Teams' interface. The 'TASKS' tab is active. A table lists tasks with columns: Title, State, Type, Created, and Operation. The 'Discover' task is highlighted. To the right, a details pane for 'Discover Teams' shows the following information:

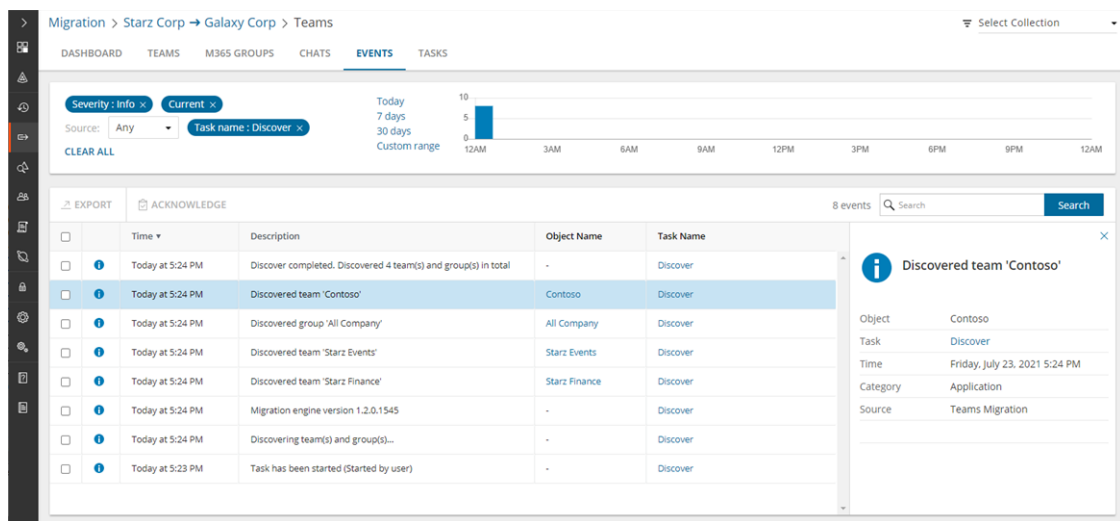
- Type: discoverteams
- Created: Wednesday, September 15, 2021 8:34 AM
- Modified: Wednesday, September 15, 2021 8:34 AM
- Status: Completed
- Last Operation: Discovered 22 teams(s) and groups(s)
- Schedule: Now
- Events (26): 26

A 'Copy Diagnostics' button is located at the bottom of the details pane.

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.

## Reviewing the Discover Task Events

1. Open 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



## Managing Groups with Collections

Migrating large numbers of groups requires careful planning. The groups could belong to different offices and geographical locations or sensitive departments. Migrating groups of Finance or Legal departments require special care. Organize the groups into collections to make large group lists more manageable.

In this topic:

- [Adding Accounts to Collections](#)
- [Working with the Collections Dashboard](#)

### Adding groups to Collections

You can add groups to collections in several ways:

- Select the groups and create a new collection for them
- Select the groups and add to an existing collection
- Use a CSV file to add groups to one or more collections

**To add selected groups to a new collection:**

1. From the project dashboard, click **Open** in the *Teams* tile to open the *Teams* dashboard.
2. Click the **M365 Groups** tab and select **List View** if not already selected.
3. Select the groups you want to add to the collection.
4. From the actions toolbar, click **Collections > New Collection**. The *New Collection* dialog opens.

5. Enter a collection name in the **Collection name** field and click **Save** to add the selected groups to the collection.

**To add selected groups to an existing collection:**

1. From the project dashboard, click **Open** in the *Teams* tile to open the *Teams* dashboard.
2. If you need to create a new collection:
  - a. From the top-right corner of the migration workspace, click **Select Collection > + New Collection**
  - b. Enter a collection name and click **Save** to add this collection to the project.
3. Click the **M365 Groups** tab.
4. Select the groups you want to add to an existing collection.
5. From the actions toolbar, click **Collections > Add To Collection**. The *Add to existing collection* dialog opens.

6. Select a collection from the **Collection name** dropdown and click **Save** to add the selected groups to the collection.

**To add groups to one or more collection with a CSV file:**



Using a CSV file provides the following additional benefits:

- Multiple collections can be created with the same CSV file.
- Existing collections can be specified in the CSV file to add additional groups.
- M365 Groups can be listed in multiple collections.

This is a two-step process as described below to add teams to one or more collections:

### Step 1: Prepare the CSV file

1. From the actions toolbar, click **Collections > Import Collections**. The *New Import Collections from File Task* wizard starts.
2. From the **Mapping File** step, click **Download Example File**. A ZIP file is downloaded.
3. Extract the CSV file and use it to prepare your import file in one of three formats described below:

**i** **NOTE:** CSV file names with non-ASCII characters are not supported. Groups in the CSV that have not been discovered cannot be added to a collection.

Use the format shown below to prepare the CSV file. The minimal set of columns required are shown.

**i** **TIP:** You can export the selected groups to a CSV file and then add the **Collection** column and retain the **Source MailNickname** column. All other columns in the exported CSV file will be ignored so you can remove those columns if you want.

	A	B
1	Collection	Source MailNickname
2	Security	Operations
3	Security	Safety
4	Security	Standards
5	Enterprise	Retail
6	Enterprise	Sales
7	Enterprise	Corporate

- **Collection** - Column header for the collection name. If a collection in the CSV does not exist, a new collection will be created with the name specified in the CSV.
- **Source MailNickname** - Email alias of the M365 group. You can get the **Source MailNickname** property of the teams when you [export groups](#) to a CSV file. **Source MailNickname** values are case-sensitive.

### Step 2: Import the CSV file

1. Open the **M365 Groups** tab.
2. From the actions toolbar, click **Collections > Import Collections**. The *New Import Collections from File Task* wizard starts.
3. **Mapping File**
  - a. Click **Browse** and select the CSV file. The selected CSV file name appears.
4. **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** - task runs immediately.
- **Run later** - task must be started manually.
- **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.

b. Click **Next**.

## 5. Summary

- Verify the task specifications as described below:
  - Name** - name of the task. The default name is **Import Collections From File**. You can specify a custom name.
  - Scheduled start** - date and time when the task will start. **Now** indicates that the task will start immediately.
- Click **Back** to revise or review a previous step or click **Finish** to complete the task wizard and start the task as scheduled.
- Click **Finish**.

### *To verify the addition of the group to a collection:*

- Check the **Collections** column in the M365 Groups List View that indicates the most recent collection where the group has been added and the number of additional collections that also contain the group.
- Select a group from the M365 Groups List View to open the Group Detail pane. Check the **Collections** property that lists all the collections where the group has been added.

## Working with the Collection Dashboard

The Collection Dashboard shows the collection-specific summary, allows you to see group added to it, create tasks for them, and monitor the progress of tasks.

### *To view the collection dashboard for an existing collection:*

- Log in to Quest On Demand and choose an organization if you have multiple organizations.
- From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
- Create a new project or open an existing project.
- From the project dashboard, click **Open** in the *Teams* tile to open the *Teams* migration workspace.
- From the top-right corner of the migration workspace, click **Select Collection** and then select the collection to view. The collection *Dashboard* is displayed.
- Click the **M365 Groups** tab. You will see the list of groups that belong to the collection.

### *To remove items from a collection:*

- From the actions toolbar, click **Collections > Remove from Collection**.
- In the confirmation dialog click **Remove** to remove the selected groups from the collection.

### *To rename the collection:*

- Click **Collections > Rename Collection** in the Actions toolbar of the collections dashboard.

**To delete the collection:**

- a. Click **Collections > Delete Collection** in the Actions toolbar of the collections dashboard.

**To see the tasks for collection-specific Group objects:**

- a. Open the **Tasks** tab.

**To see the events related to the collection:**

- a. Open the **Events** tab.

**To return to the Teams migration workspace:**

- a. Click the collection dropdown at the top-right corner of the page, and select **Show All**.

## Exporting Groups

**To export groups to a comma-separated values (CSV) file:**

1. Click **Teams** from your migration project.
2. Click the **M365 Groups** tab. From the *M365 Groups List View* select the groups you want to export.
3. From the *M365 Groups List View* select **More** and then select **Export**.
4. Open the CSV file by extracting it from the ZIP file that is downloaded to your computer.

The exported data contain the following information:

- **Group Name** - source Microsoft 365 group name.
- **Workflow** - (deprecated) the most recent operation performed on the Microsoft 365 group.
- **Created** - date and time the Microsoft 365 group record was created
- **Target Group Name** - suggested target **team** name that will be provisioned in the target tenant
- **Source MailNickname** - alias for the associated Microsoft 365 Group. This value will be used for the mail enabled object and will be used as PrimarySmtpAddress for this Microsoft 365 Group. The value must be unique across your tenant.
- **Last Operation Description** - description of the last operation performed on this group.

## Provisioning Groups

Before you start, verify that you have discovered all the Microsoft 365 groups without teams. Make sure that all accounts that are members of these groups, have been discovered and matched with accounts in the target tenant. Group members are not added to groups in this step. Use the migration task to migrate group membership.

### Considerations

A **Group Map** task will be automatically created in the *Accounts and User Data* migration workspace of the project. The purpose of this task is to match the M365 group accounts so that the On Demand Migration for SharePoint

service can use the mapping for membership migration.

## Starting the provisioning task

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **Teams** tile, or click **Open** from the Teams tile to open the *Teams* dashboard.
5. Click the **M365 Groups** tab.
6. Select one or more groups from the *Groups List View*.
7. Click **Provision**. The *New Groups Provisioning Task* wizard starts. Each step is described below:
8. **Provision Options**

These options control the actions of the provisioning task if the selected groups already exist in the target tenant. Groups that are not in the target tenant will be automatically provisioned.


The screenshot shows the 'New Groups Provisioning Task' wizard, Step 1 of 3: Provision Options. The left sidebar contains a vertical list of steps: Provision Options (highlighted with an orange bar), Notification, Schedule, and Summary. The main content area is titled 'New Groups Provisioning Task' and contains the following options:

- Select a provisioning option if the group already exists in the target tenant:
  - ☐ Do not provision the group
  - ☒ Provision a new group. A suffix will be added to the original name
  - ☐ Merge with the existing group
- Provide a suffix for the display name of the new group:
  - New group display name suffix:
  - ☐ Suppress automatic Group Welcome Message sending
- Multi-Geo Options (expanded):
  - Preferred location:

At the bottom, there are navigation buttons: 'Back' (disabled), 'Next' (active), 'Finish' (disabled), and 'Cancel' (disabled). The text 'Step 1 of 3' is displayed at the bottom left.

Select and configure the options as described below:

- a. **Do not provision the group** - The group will be skipped if it exists in the target tenant.
- b. **Provision a new group. A suffix will be added to the original name** - A new group will be provisioned with the specified suffix appended to the group name
  - **New group display name suffix** - Specify a suffix to append to the group name. The default suffix is **(migrated)**.
- c. **Merge with the existing group** - Select this option to set up a mapping between a source and target group with the same name. When members are migrated with the migration task, the accounts that are members of the source group will be added to the same group in the target tenant.

- d. **Suppress automatic Group Welcome Message sending** - Select the check box to prevent group members from receiving a welcome message.
- e. **Multi-geo options: Preferred location** - Leave the preferred data location as **None** which is the default if the target is a multi-geo tenant and you have already configured a default geo location for the target tenant. All groups will be migrated to the same region. To set up the default geo location, see [Configuring the Migration Project](#). If you change the default settings, please allow at least 5 minutes for the new settings to take effect. Alternatively, select the geo location configured for the target tenant.
- f.  **TIP:** To migrate groups to different regions, the best practice is to create a collection of groups for each region. Example collection names could be "Migrate to EUR", "Migrate to JPN" or "Migrate to NAM". Then use the collection as a filter to create the provision task. For more information about multi-geo tenants, see [Microsoft 365 Multi-Geo](#).

## 9. Notification

- a. **Send notification email once the task is completed** - select this option to send a notification email when a provisioning task completes.
  - **Only in a case of failure** - select this option to send the email if the provisioning task fails to complete successfully.
- b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
- c. Click **Next**.

## 10. 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** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- b. Click **Next**.

## 11. Summary

- a. Verify the task specifications as described below:
  - **Name** - Name of the task. The default name is **Provision Groups**. You can specify a custom name.
  - **Source tenant** - Name of the source tenant in this project.
  - **Target tenant** - Name of the target tenant in this project.
  - **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 provisioning task is created. You can track its progress from the **Tasks** tab, view the summary on the Dashboard or monitor alerts and notifications from the **Events** tab.


# Removing Groups

To manage large lists of M365 groups in a project, you can remove one or more M365 groups from the groups list view that you don't need for migration. The M365 groups that are removed will remain in the source tenant and you must re-discover the groups in the project when you need them for migration.

When 365 groups are removed, all associated items, mappings and migration information will also be removed from the project. When these M365 groups are rediscovered, they will be treated as new M365 groups in the project and the process of provisioning and migration of the M365 groups and related items must be repeated.

If these groups are listed in other projects, they will be displayed in those projects.

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **Teams** tile, or click **Open** from the Teams tile to open the *Teams* dashboard.
5. Select the **Teams** tab and select **List View** if not already selected.
6. Select the groups you want to clear.

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

7. Click **More** and then click **Delete**.
8. The *Remove Objects* confirmation dialog opens.
9. Click **Remove** to remove the selected groups from the list.

## Collecting Statistics

The **Collect Group Statistics Task** for M365 Groups conducts an assessment of all groups in the source tenant and matching groups in the target tenant. It provides information like member count, planner count and planner task count for the groups selected in the source tenant, and optionally in target tenant if the group is already provisioned.

Each **Collect Group Statistics Task** generates events. Events are milestones that a task achieves as it runs. For example, when a M365 Groups **Collect Group Statistics Task** starts, an event is logged and it appears in the events list. When the number of groups that are selected for assessment is large, the M365 Groups **Collect Group Statistics Task** divides the total number of groups into manageable sets. Each set is called a batch. When a batch of groups is assessed, another event occurs.

In this topic:

- [Starting an Collect Group Statistics Task](#)
- [Reviewing the Collect Group Statistics Task](#)
- [Reviewing the statistics collected](#)
- [Reviewing the events for the Collect Group Statistics Task](#)

### Starting a Collect Group Statistics Task

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.

3. Create a new project or open an existing project.
4. Click the **Teams** tile, or click **Open** from the Teams tile to open the *Teams* migration workspace.
5. Select the **M365 Groups** tab. Then select any group in the list to activate the menu options.
6. Click **Collect Statistics** from the *Actions* menu. The *New Collect Group Statistics Task* wizard starts. Each step is described below:

## 7. Collect Statistics Options

- a. Choose from the following options

- **Include collection of statistics from target tenant** - select this option to include the same groups from the target tenant and generate the [Comparison Report](#). Statistics will only be collected for the target tenant groups if a provision task has been executed for the group previously.
- **Collection levels:**
  - **Basic (Fast)** - collect statistics about member count and content size (in GB) for the groups selected in the source and target tenant if provisioned.
  - **Advanced (Slow)** - collect statistics about member count and content size (in GB), planner count and planner task count for the groups selected in the source and target tenant if provisioned. The task requires more time to run.



**NOTE:** When a **Collect Group Statistics** task is started with this option selected, the temporary Migration Service for the source tenant will be added to all groups. 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.

- b. Click **Next**

## 8. Notification

- a. **Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
  - **Only in a case of failure** - Select this option to send the email if the discovery task fails to complete successfully.
- b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
- c. Click **Next**.

## 9. Schedule

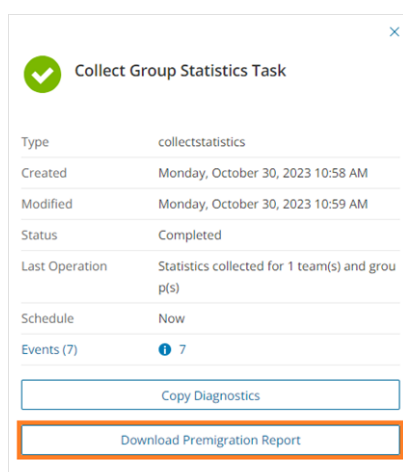
- a. Choose from one of three options to schedule the task. The scheduler will be activated only after you complete the task wizard.
  - **Run now** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- b. Click **Next**.

## 10. Summary

- a. Verify the task specifications as described below:
  - i. **Name** - name of the task. You can specify a custom name. Default name is **Collect Group Statistics Task**.
  - 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.

## Reviewing the Collect Groups Statistics Task

1. Open the **Tasks** tab.
2. Select the Collect Group Statistics task for groups 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 `collectstatistics`.
  - 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.



## Reviewing the statistics collected

1. Open the **Tasks** tab.
2. Select the **Collect Group Statistics Task** that you want to review.



- From the task details pane, click **Download Premigration Report**.
- Download and save the ZIP file to a suitable folder, and extract the report.



**NOTE:** Premigration reports are also available from the following tasks:

- Discover All
- Discover From File

## Reviewing the events for the Collect Group Statistics Task

- Open the **Tasks** tab.
- Select a **Collect Group Statistics Task** for groups that you want to review.
- In the task details pane that opens, click **Events** (*number*). The *Events* tab opens with a filtered list of events for the selected task.
- Select an event that you want to review. In the task details pane that opens, the information presented is as described below:
  - Object** - name of the group if applicable.
  - Task** - name of the task.
  - Time** - date and time when the event occurred.
  - Category** - type of task. the value is **Application**.
  - Source** - the migration workspace from where the event was generated. The value is **Teams Migration**.

EXPORT

ACKNOWLEDGE

EDIT COLUMNS

17 events, 1 selected

Search

	Time	Description	Object Name	Task Name
<input checked="" type="checkbox"/>	Today at 7:25 PM	Collect Statistics completed. Statistics collected for 12 team(s) and group(s)	-	Collect Statistics
<input type="checkbox"/>	Today at 7:25 PM	Discovered group 'Contoso Life'	Contoso Life	Collect Statistics
<input type="checkbox"/>	Today at 7:25 PM	Discovered group 'Parents of Contoso'	Parents of Contoso	Collect Statistics
<input type="checkbox"/>	Today at 7:25 PM	Discovered group 'Contoso Team'	Contoso Team	Collect Statistics
<input type="checkbox"/>	Today at 7:25 PM	Discovered group 'Operations'	Operations	Collect Statistics
<input type="checkbox"/>	Today at 7:25 PM	Discovered group 'Ask HR'	Ask HR	Collect Statistics
<input type="checkbox"/>	Today at 7:25 PM	Discovered group 'Sales Best Practices'	Sales Best Practices	Collect Statistics
<input type="checkbox"/>	Today at 7:25 PM	Discovered group 'All Company'	All Company	Collect Statistics
<input type="checkbox"/>	Today at 7:25 PM	Discovered group 'CEO Connection'	CEO Connection	Collect Statistics
<input type="checkbox"/>	Today at 7:25 PM	Discovered group 'Office 365 Adoption'	Office 365 Adoption	Collect Statistics
<input type="checkbox"/>	Today at 7:25 PM	Discovered group 'Leadership'	Leadership	Collect Statistics

1-17 of 17 Results

Show 25

<

>

1

/1

Collect Statistics completed. Statistics collected for 12 team(s) and group(s)

Object	
Task	Collect Statistics
Time	Monday, July 17, 2023 7:25 PM
Category	Application
Source	Teams Migration

## Migrating Groups

Before you start, verify that you have provisioned all the Microsoft 365 groups without teams. See [Provisioning Groups](#) for more information. Migration will be skipped for all groups that are not yet provisioned.

## Considerations

- When groups are migrated, the account that is assigned the Migration Service role is added to the group. If dynamic membership is enabled, the rules are modified to include this account. This temporary role is required for migrating groups by the On Demand Migration service.
- The migration service performs a full comparison during a remigration between the source and target, ensuring that messages are not moved or deleted, and folders are not moved, renamed, or deleted in the target.

## Starting a Microsoft 365 Groups Migration Task

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click **Teams** from the project tiles. Click **Open** from the Teams tile to open the *Teams* dashboard.
5. Click the **M365 Groups** tab.
6. Select one or more groups from the *Groups List View* that are provisioned (State = Provisioned)
7. Click **Migrate**. The *New Groups Migration Task* wizard starts. Each step is described below:
8. **Start**
  - a. **Task Name** - You can specify a custom name. The default name is **Migrate Groups**.
  - b. **Use the settings from an existing migration template for this task** - select this option if you have already saved a previous migration templates. if this is the first time you are migrating mailboxes, keep this option unchecked.
    - **Select template** - select a template that you previously created, from the dropdown list.
  - c. **Go to Summary step** - select this option to preserve the settings and go directly to the last step of the wizard. If you do not select this option, but you have selected a template, you can step through the wizard and edit the settings in the template.
  - d. Click **Next**.
9. **Migration Options**
  - a. **Group mailbox** - Select this option to migrate Group Mailbox.
  - b. **SharePoint Content** - Select this option to migrate associated SharePoint sites including files, One Note, OneDrive Shared Library and other supported tools.
    - **Include site level term group for site migration** - select this option to add site level metadata to the target Global Term Store. The Global Term Store must be migrated before you can use this option, otherwise an error will be logged as an event. For more information, see [Migrating the Global Term Store](#).
  - c. **Planner** - Select this option to migrate the group Planner.
  - d. **Group Membership** - Select this option to migrate group members. If this option is not selected, group members will not be migrated.

## 10. File Version Options

- a. Choose the migration option for file versions associated with groups selected for migration.
  - **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 site 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 dropdown list. 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 dropdown list. 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 site version does not exceed the selected size limit, then the file and its versions will be migrated.
- b. Click **Next**.

## 11. SharePoint Permission Options

- a. Select how Sharing Links permissions are migrated. Direct permissions are always migrated.
  - **Migrate permissions** - select this option so that unique permissions associated with web, list and list items are migrated. If you clear this option all other options in this step are deactivated and permission migration is prevented. When permissions are not migrated, the permissions for new migrations of web, list and list items, that are not already on the target tenant, will be inherited from its parent. The permissions will not be changed for migrations of content that was already migrated to the target tenant.
  - **Migrate permissions only for previously migrated webs and lists** - select this option to migrate permissions for webs and lists only. Permissions will be merged with any existing permissions on the target tenant. List item permissions are not migrated with this option because list item permissions cannot be migrated separately from the list item. To re-migrate list items and its permissions, re-migrate the whole list without selecting this option. Selected objects must be in a *migrated* or *migrated with issues* state for this option work.
  - **Do not migrate Sharing Links permissions** - select this option to ignore Sharing Links permissions.
  - **Migrate Sharing Links permissions as direct permissions. Migration is slower** - select this option to migrate Sharing Links permissions. These permissions will be migrated as direct permissions. The conversion and migration of Sharing Links permissions takes more time to migrate.
- b. Click **Next**.

## 12. SharePoint File Options

- a. Choose from the following options to determine how changes to list items that were previously migrated should be remigrated:
  - **Refresh list items** - an incremental migration is performed to repair and update the target list with missing or new items.
  - **Migrate all list items** - all list items are remigrated.
- b. Choose a conflict resolution option.



### NOTE:

- Conflict resolution rules are applied only to list items that have been previously migrated.
- Conflict resolution rules will not be applied if the **Migrate all list items** option is selected in the previous step. All files in the target tenant will be overwritten if all files are migrated.
- Conflict resolution rules will not be applied to Site Pages and Site Assets system libraries.
- **Overwrite target files** - all migrated files in the target tenant will be overwritten. Migration is fastest with this option selected.
- **Skip if target list item is the same version or newer** - ignore list items in the target tenant with the same or newer version. If the item does not exist in the target tenant, a copy of the source item will be migrated.

- **Create a copy if target list item is the same version or newer** - preserve the list item in the target tenant with the same or newer version and migrate a copy of the source item. When you choose this option, you must choose from one of the following file suffix options: `_Copy`, `_Source`, `_Older`, `_Backup`, and `_1`.
  - c. **Migrate list and library comments** - select this option to include list and library comments in the migration task. A large number of list and library comments increase task processing time.
  - d. **Auto re-run list item migrations to retry missing items** - select this option to automatically re-run the list item migration during list migrations to retry and repair missing items.
  - e. Click **Next**.
13. **Sensitivity Labels**
- Choose how you want to migrate sensitivity labels applied to associated SharePoint content. Sensitivity labels require specific tenant permissions. They must be discovered and matched before you can use the following options. For more details, see the topic [Sensitivity Labels](#).
- a. **Process document sensitivity labels** - select this checkbox to enable sensitivity label processing if you have already configured and matched sensitivity labels.
 

**CAUTION:** Encrypted documents may be inaccessible on the target tenant if sensitivity labels that are applied to documents in the source tenant are not processed. If a document is encrypted in the source, then it is decrypted, labels are processed and the document is reencrypted in the target.

    - **Match and apply corresponding labels to documents migrated to the target** - select this option to match and apply sensitivity labels during migration. If the label in the source document has a matching label in the target (there is a corresponding target label in the On Demand repository), the source label is replaced by the target label. If the label in the source document has no matching label in the target (there is no corresponding target label in the On Demand repository), the document is not migrated.
    - **Remove sensitivity labels from documents migrated to the target** - select this option to clear the labels from migrated documents. Labels on documents in the source tenant are not changed.
  - b. Click **Next**.
14. **Notification**
- a. **Send notification email once the task is completed** - select this option to send a notification email when a migration task completes.
    - **Only in a case of failure** - select this option to send the email if the migration task fails to complete successfully.
  - b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
  - c. Click **Next**.
15. **Reporting**
- Select the check box **Generate detailed report of migration errors** to generate a migration error report when you run the migration task.
- You can download the report from the **Reports** tab of the *Teams* migration workspace by clicking the **Download** link in the **Error Log** column. If there are no migration errors, a download link is not available. Error reports are retained for 30 days. After 30 days the download link is replaced with the label **Expired** and you can no longer download the report. For more information about error reports, see [Reports](#).

## 16. 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** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- b. Click **Next**.

## 17. Summary

- a. **Save task settings as a migration template** - select this option to save the settings in this wizard as a reusable migration template.
  - **Migration Template Name** - specify a name for the template. If you have changed the settings of a preselected template, specify the same template name to apply the changes to the template when you complete the wizard. All saved templates are displayed in the [Templates](#) tab.
- b. Verify the task specifications as described below:
  - **Name** - Name of the task. The default name is **Migrate Groups**. You can specify a custom name.
  - **Source tenant** - Name of the source tenant in this project.
  - **Target tenant** - Name of the target tenant in this project.
  - **Scheduled start** - Date and time when the task will start. **Now** indicates that the task will start immediately.
- c. 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 from the **Tasks** tab, view the summary on the Dashboard or monitor alerts and notifications from the **Events** tab.



**NOTE:** If a group from the source tenant is merged with a group in the target tenant during the provision process, any new mail items, SharePoint files and Planner items that are generated in the source tenant will appear in the target group.

# Renaming and Mapping Teams and Groups

You can rename and map teams and M365 groups, or rename, map and merge one or more source teams (or M365 group) to a specific team (or M365 group) in the target tenant in two ways:

- [Renaming and mapping teams and groups automatically](#)
- [Renaming and mapping teams and groups manually from a file](#)

## Renaming and Mapping Teams and Groups 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 **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click **Teams** from the project tiles, or click **Open** from the Teams tile to open the *Teams* dashboard.
5. Click the **Teams** tab or the **M365 Groups** tab and select one or more teams or groups that you want to rename and map.
6. Click **More** and then click **Rename and Map**. The *New Teams & Groups Rename and Map Task* wizard starts. Each step is described below:
  7. **Mapping options**
    - a. Enter the information as described below:
      - **Add prefix** - specify a prefix for the team or group name. Whitespaces are not supported.
      - **Add suffix** - specify a suffix for the team or group name. Whitespaces are not supported.
    - b. **Rename mail nick name** - select this option to add a prefix or suffix to the target team or group.
    - c. Click **Next**.
  8. **Notification**
    - a. **Send notification email once the task is completed** - select this option to send a notification email when a mapping task completes.
      - **Only in a case of failure** - select this option to send the email if the mapping task fails to complete successfully.
    - b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
    - c. Click **Next**.
  9. **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** - task runs immediately.
      - **Run later** - task must be started manually.
      - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
    - b. Click **Next**.
  10. **Summary**
    - a. Verify the task specifications as described below:
      - i. **Name** - name of the task. You can specify a custom name. The default name is **Rename and Map Task**.
      - ii. **Source tenant** - name of the tenant in this project.
      - 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 task is created. You can track its progress from the **Tasks** tab, view the summary on the *Dashboard* or monitor alerts and notifications from the **Events** tab.

## Mapping, Renaming and Merging Manually from a File

To rename Microsoft 365 groups or merge one or more source groups to a specific group in the target tenant, a CSV file is used to indicate the mapping between source and target groups as described below.

### To creating a mapping file:

1. Prepare a comma-separated values (CSV) file with the source and target group names.

**i** **TIP:** Export selected groups to a comma-separated values (CSV) and then edit this file. See [Exporting Groups](#) for more details.

2. The header row defines the names of the source and target attribute used for mapping. Subsequent rows list the mapping values of the attributes.

The columns are as follows:

- **Source Mailnickname** - unique name of the source group. The following column header variations are supported: SourceMailNickname, Source MailNickname, Source MailNickName. The column header is case sensitive.
- **Target Mailnickname** - unique name of the target group. The following column header variations are supported: TargetMailNickname, Target MailNickname, Target MailNickName. The column header is case sensitive. You can merge multiple source groups to a single target group when you specify the same **Target Mailnickname** in a mapping file.
- **Target Group Name** - display name of the target group. The column header is case sensitive.

	A	B	C	
1	Source Mailnickname	Target Mailnickname	Target Group Name	
2	Corporate	CompanyNews	Company News	Example 1
3	StarMarketing	GalaxyMarketing	Galaxy Marketing	Example 2
4	StarEvents	GalaxyEvents	Galaxy Marketing	
5	TeamSales	GalaxySales	Galaxy Sales Group	Example 3
6	GlobalSales	GalaxySales	Galaxy Sales Group	
7	SalesMembers	GalaxySales	Galaxy Sales Group	

**Example 1:** Row 2: Simple change of name.

The source group display name and mailnickname are changed.

**Example 2:** Rows 3 and 4: Different target groups with the same display name.

The Target Mailnicknames are different but the Target Group Names are the same. The Target Mailnickname takes precedence and the groups will be mapped to distinct target groups but the display name of each target group will be the same. It is recommended that you use unique display names to avoid confusion.

**Example 3:** Rows 5, 6 and 7: Merge multiple source groups with the same target group.

The Target Mailnickname is the same. The source groups will be merged with the same target group with the specified display name.



3. Save the CSV file.



**NOTE:** File names with non-ASCII characters are not supported.

**To upload a mapping file:**

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click **Teams** from the project tiles, or click **Open** from the Teams tile to open the *Teams* dashboard.
5. Click the **M365 Groups** tab.
6. Click **More > Map from File**. The *New Mapping from File Task* wizard starts. Each step is described below:
7. **Mapping file**
  - a. Click **Browse** and select the CSV mapping file. The selected file name appears next to the **Browse** button.
  - b. Click **Next**.
8. **Notification**
  - a. **Send notification email once the task is completed** - select this option to send a notification email when a mapping task completes.
    - **Only in a case of failure** - select this option to send the email if the mapping task fails to complete successfully.
  - b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
  - c. Click **Next**.
9. **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** - task runs immediately.
    - **Run later** - task must be started manually.
    - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
  - b. Click **Next**.
10. **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 in this project.
    - 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 task is created. You can track its progress from the **Tasks** tab, view the summary on the Dashboard or monitor alerts and notifications from the **Events** tab.

# SharePoint Migration

On Demand Migration offers a fast and convenient way to transfer SharePoint content between Microsoft 365 tenants. The On Demand Migration SharePoint (ODMSP) service requires additional [licensing](#).

**i** **IMPORTANT:** Before migrating any SharePoint sites, you must ensure all impacted accounts exist in the target tenant. Account matching or migration should be completed.

The *Getting Started* tile on the SharePoint migration Dashboard with *Quick help* helps you to prepare, start and perform all the steps to migrate your SharePoint sites. The basic SharePoint migration workflow consists of the following steps:

Step	Description
1	<a href="#">Configure the SharePoint migration project defaults (optional)</a>
2	<a href="#">Verify prerequisites are met</a>
3	<a href="#">Discover sites (top-level sites) in the source tenant</a>
4	<a href="#">Discover site contents like members, webs and lists (optional)</a>
5	<a href="#">Map geo-locations (optional)</a>
6	<a href="#">Map source sites to custom target sites (optional)</a>
7	<a href="#">Match source sites to with existing target sites (optional)</a>
8	<a href="#">Map Lists (optional)</a>
9	<a href="#">Override migration defaults for specific migration tasks (if necessary)</a>
10	<a href="#">Migrate site collections and their content</a>
11	<a href="#">Monitor the progress and track issues</a>

**i** **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 all account migration tasks that are pending before starting the SharePoint migration.

# What We Migrate

Migration limitations indicated below may not be an exhaustive list of limitations as some may appear in unique customer migration scenarios, or arise due to platform or legacy support restrictions. In some cases, a solution to a limitation may already be on the product roadmap.

Quest On Demand migrates the following SharePoint components:

**i** **NOTE:** You can migrate files with a maximum size of 250 GB. 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.  
Microsoft public preview features are not supported.

## Objects and content types

Object	Support	Notes
<b>Site collections and sites</b> Modern experience: top-level sites and sub-sites		
Document ID service feature	✓	
Global and site term groups	✓	
Hub settings and associations	✓	
Language settings	✓	
List templates	✓	
Lists and Libraries	✓	
Navigation elements	✓	
People and groups	✓	
Quick launch	✓	
Regional settings	✓	
SharePoint Designer settings	✓	
Site collection admins	✓	
Site collection feature activation	✓	
Site collection owner	✓	
Site columns	partial	Column formatting is not supported
Site content types	✓	
Site feature activation	✓	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.
Site page headers and footers	✗	
Site permissions	✓	

Object	Support	Notes
Sub-sites	✓	
Title, description and logo	✓	
Top navigation	✓	
<b>Site templates</b> Sites and webs based on unsupported templates are not supported for migration and will be skipped unless they are remapped. Unsupported site templates listed below is selective of common and popular templates.		
Community site (COMMUNITY#0)	✓	
Classic project site (PROJECTSITE#0)	✓	
Classic team site (STS#0, SPSMSITEHOST#0)	✓	
Document Center (BDR#0)	✓	
Enterprise Wiki (ENTERWIKI#0)	✓	Some limitations are applicable
Express Hosted Site (EHS#1)	✗	
Modern communication site (SITEPAGEPUBLISHING#0)	✓	
Modern Microsoft 365 group site (Group#0).	✓	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.
Modern team site without Microsoft 365 group (STS#3)	✓	
Publishing Portal (BLANKINTERNET#0, BLANKINTERNET#2, CMSPUBLISHING#0)	✓	Some limitations are applicable
Point publishing sites (POINTPUBLISHINGHUB#0, POINTPUBLISHINGPERSONAL#0, POINTPUBLISHINGTOPIC#0)	✗	Can be remapped.
Project Web App site (PWA#0)	✗	Can be remapped.
Record Center (OFFILE#1)	✓	
Search Center (SRHCEN#0, SRHCENTERLITE#0, SRHCENTERLITE#1)	✗	Can be remapped.
Team Channel (TeamChannel#0, TeamChannel#1)	✓	Team Channel sites are associated with shared or private channels in a team. These sites can only be migrated after the parent team for the associated channels has been provisioned in the target tenant with the ODM Teams provisioning service.
<b>Content types</b>		

Object	Support	Notes
Advanced settings	✓	
Column	✓	
Column Order	✓	
Content type hub	✗	
Document set settings	✓	The Document set setting to define default content is not currently supported
Name and description	✓	
Term Store	partial	Term Set does not migrate when Available for Tagging is deactivated. Translation for term sets cannot be migrated. Reused, Pinned, Deprecated terms are not supported
<b>Column types of site, list, and content type</b>		
Choice	✓	
Currency	✓	
Date and time	✓	
Hyperlink or picture	✓	
Image	partial	Image column, column data and referenced image assets are migrated but links to image assets are broken.
Managed metadata	✓	
Multiple lines of text	✓	
Number	✓	
Person or group	✓	
Single line of text	✓	
Yes/No	✓	
<b>List and libraries</b>		
Advanced settings <ul style="list-style-type: none"> <li>• Folders</li> <li>• Search</li> <li>• Offline client availability</li> <li>• List experience</li> <li>• List attachments</li> <li>• List item-level permissions</li> <li>• List index non-default views</li> </ul>	✓	

Object	Support	Notes
<ul style="list-style-type: none"> <li>Library Document Templates</li> </ul>		
Audience targeting settings	✓	
Document library item highlighting/pinning	✗	
Document library sensitivity labels	✗	
Forms for lists	✗	
List alerts	✓	
List columns	partial	Column formatting is not supported
List content types <ul style="list-style-type: none"> <li>New content type button order</li> <li>Default content type</li> </ul>	✓	
List name, description and navigation	✓	
List permissions	✓	
List rating settings	✗	
List views	partial	View formatting is not supported
Modern list comments	✓	
Pages libraries	✓	
Rules for lists	✗	
Validation settings	✓	
Version history of documents (optional)	✓	Version history transfer means a significant increase in migration time.
Version history of list items (optional)	✓	
Version settings	✓	
<b>List templates</b>		
Announcements	✓	
Contacts	✓	
Custom list	✓	
Custom list in data sheet view	✓	
Discussion board	✓	
Document Library	✓	
Events and Calendar	✓	Calendar overlays are not supported.
Issue tracking	✓	
Links	✓	

Object	Support	Notes
Picture library	✓	
Promoted links	✓	
Tasks	✓	
Tasks with timeline and hierarchy	✓	
Wiki page library	✓	
<b>Folder</b>		
Properties	✓	
Folder permissions	✓	
<b>List item</b>		
Alerts on list items	✓	
Attachments	✓	
Authorship properties <ul style="list-style-type: none"> <li>Created date</li> <li>Created by</li> <li>Last modified date</li> <li>Last modified by</li> </ul>	✓	Source user email will be used for <i>Created by</i> and <i>Last modified by</i> if the source user account has not been matched to an account on the target.
Column data	✓	
List item permissions	✓	
<b>Document</b>		
Alerts on documents	✓	
Authorship properties <ul style="list-style-type: none"> <li>Created date</li> <li>Created by</li> <li>Last modified data</li> <li>Last modified by</li> </ul>	✓	Source user email will be used for <i>Created by</i> and <i>Last modified by</i> if the source user account has not been matched to an account on the target.
Document ID service feature	✓	
Document permissions	✓	
Document properties	✓	
<b>Site pages</b>		
Modern site pages	✓	
Classic pages	✓	
<b>Web Parts</b>		
Supported web parts have been verified to ensure all links and references to SharePoint entities are updated		



Object	Support	Notes																																																
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.																																																		
Modern web parts	partial	<b>Supported web parts</b> <table> <tr> <td>Bing Maps</td><td>Hero</td><td>Quick Chart</td></tr> <tr> <td>Button</td><td>Highlighted content</td><td>Quick links</td></tr> <tr> <td>Call to action</td><td>Image</td><td>Recent documents</td></tr> <tr> <td>Code Snippet</td><td>Image gallery</td><td>Site activity</td></tr> <tr> <td>Countdown Timer</td><td>Kindle instant Preview</td><td>Sites</td></tr> <tr> <td>Divider</td><td>Link</td><td>Spacer</td></tr> <tr> <td>Document Library</td><td>List</td><td>Text</td></tr> <tr> <td>Embed (links that may be in the embed web part are not remapped after migration)</td><td>List properties</td><td>Twitter</td></tr> <tr> <td>Events</td><td>Markdown</td><td>Weather</td></tr> <tr> <td>File viewer</td><td>News</td><td>World Clock</td></tr> <tr> <td>Group Calendar</td><td>Page Properties</td><td>YouTube</td></tr> <tr> <td></td><td>People</td><td></td></tr> </table> <b>Unsupported web parts</b> <table> <tr> <td>Conversations</td><td>Microsoft Power Apps</td><td>Organization Chart</td></tr> <tr> <td>Editorial Card</td><td>My Feed</td><td>Planner</td></tr> <tr> <td>Highlights</td><td>Office 365 Connectors</td><td>Power BI</td></tr> <tr> <td>Microsoft Forms</td><td></td><td>Saved for Later</td></tr> </table>	Bing Maps	Hero	Quick Chart	Button	Highlighted content	Quick links	Call to action	Image	Recent documents	Code Snippet	Image gallery	Site activity	Countdown Timer	Kindle instant Preview	Sites	Divider	Link	Spacer	Document Library	List	Text	Embed (links that may be in the embed web part are not remapped after migration)	List properties	Twitter	Events	Markdown	Weather	File viewer	News	World Clock	Group Calendar	Page Properties	YouTube		People		Conversations	Microsoft Power Apps	Organization Chart	Editorial Card	My Feed	Planner	Highlights	Office 365 Connectors	Power BI	Microsoft Forms		Saved for Later
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Classic web parts	partial	<b>Supported web parts</b> <table> <tr> <td>About the community</td><td>Get started with your site</td><td>Page Viewer</td></tr> <tr> <td>Blog Archives</td><td>Image Viewer</td><td>Picture Library Slideshow</td></tr> <tr> <td>Blog Notifications</td><td>Join Community</td><td>Project Summary</td></tr> <tr> <td>Blog Tools</td><td>Library</td><td>Site Feed</td></tr> <tr> <td>Community Tools</td><td>List</td><td>Site Users</td></tr> <tr> <td>Content Editor</td><td>My Membership</td><td>What's happening</td></tr> </table>	About the community	Get started with your site	Page Viewer	Blog Archives	Image Viewer	Picture Library Slideshow	Blog Notifications	Join Community	Project Summary	Blog Tools	Library	Site Feed	Community Tools	List	Site Users	Content Editor	My Membership	What's happening																														
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Community Tools	List	Site Users																																																
Content Editor	My Membership	What's happening																																																

Object	Support	Notes
		<b>Unsupported web parts</b> Business Data category Media and Content category Social Collaboration category Content Rollup category Search category Filters category Server-driven content category
Custom web parts	✓	
Audience targeting settings	✗	
<b>Workflow and Forms</b>		
Forms for Lists	✗	
Microsoft InfoPath Forms	✓	Migrating InfoPath Forms requires a SharePoint token to be associated with the migration project to allow access to the Microsoft retention policy and InfoPath form APIs. For more information see <a href="#">Migrating Record Center Retention Policies and InfoPath Forms</a> .
Microsoft Forms	✗	
Nintex Classic Forms, Responsive Forms, and workflows	✗	
SharePoint 2010 Workflows	✗	SharePoint 2010 workflows are no longer supported in SharePoint Online.
SharePoint 2013 Workflow definitions and subscriptions	✓	Migration is attempted on a best effort basis and it is recommended that you must review the workflow definitions after the migration.
Workflow instances	✗	Any references to in-progress or completed workflows are not migrated
<b>M365 security and compliance features</b>		
Legal Hold	✗	
M365 Compliance Customer Lockbox	✗	
Microsoft Information Protection policies and labels	✗	
Retention Labels	✗	
<b>Power Platform features</b>		
Power Apps	✗	
Power Automate (Flow)	✗	

Object	Support	Notes
Power Pages	×	
Power Virtual Agents	×	

## 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.
- 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.
- 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.
  - The site is based on Publishing Portal templates.
- Managed navigation is based on term sets. The term set setting for Managed Navigation for the Publishing Portal is not migrated. The term set is set to the default on the target. You must manually update the term set setting in the target tenant if the selected term set setting in the source is no longer the default.
- There could be duplication in navigation links because links are managed from the site UI and from a Publishing Portal specific Navigation site setting.

- Hub settings for sites located in non-central regions of a multi-geo tenant cannot be migrated. The hub and spoke relationship for sites in non-central regions must be built manually after the site migrations are complete.
- If Azure Front Door caching feature is enabled for the site, the mapping of links to site assets in navigation and web parts will be incorrect due to localized authentication token included in the link.

See the [SharePoint Migration Considerations](#) for details on remigration behavior or if the target site or sub-site exists before the migration is started.

## Considerations

Your target tenant might already host SharePoint 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	Clear existing site collection option is selected	Migration action
Yes	No	Merge, all supported properties will be overwritten using source settings
Yes	Yes	Create and migrate
No	-	Create and migrate

### Merging and remigration considerations

- Sub-sites based on unsupported site templates are skipped unless they are remapped.
- 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.
- Conflict resolution setting on the List Options step of the *New SharePoint Migration Task* wizard controls how list items and docs (same name and ID) that were previously migrated in this project are remigrated to the target.
- Versions for remigrated List item and files will be removed and updated based on the settings selected in the Version Options step of the *New SharePoint Migration Task* wizard

# Prerequisites

- It is highly recommended to at least match all accounts in the 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.
- The following admin consents should be granted for SharePoint migration:
  - Migration - Basic
  - Migration - SharePoint - Minimal (for source)
  - Migration - SharePoint - Full (for source and target)

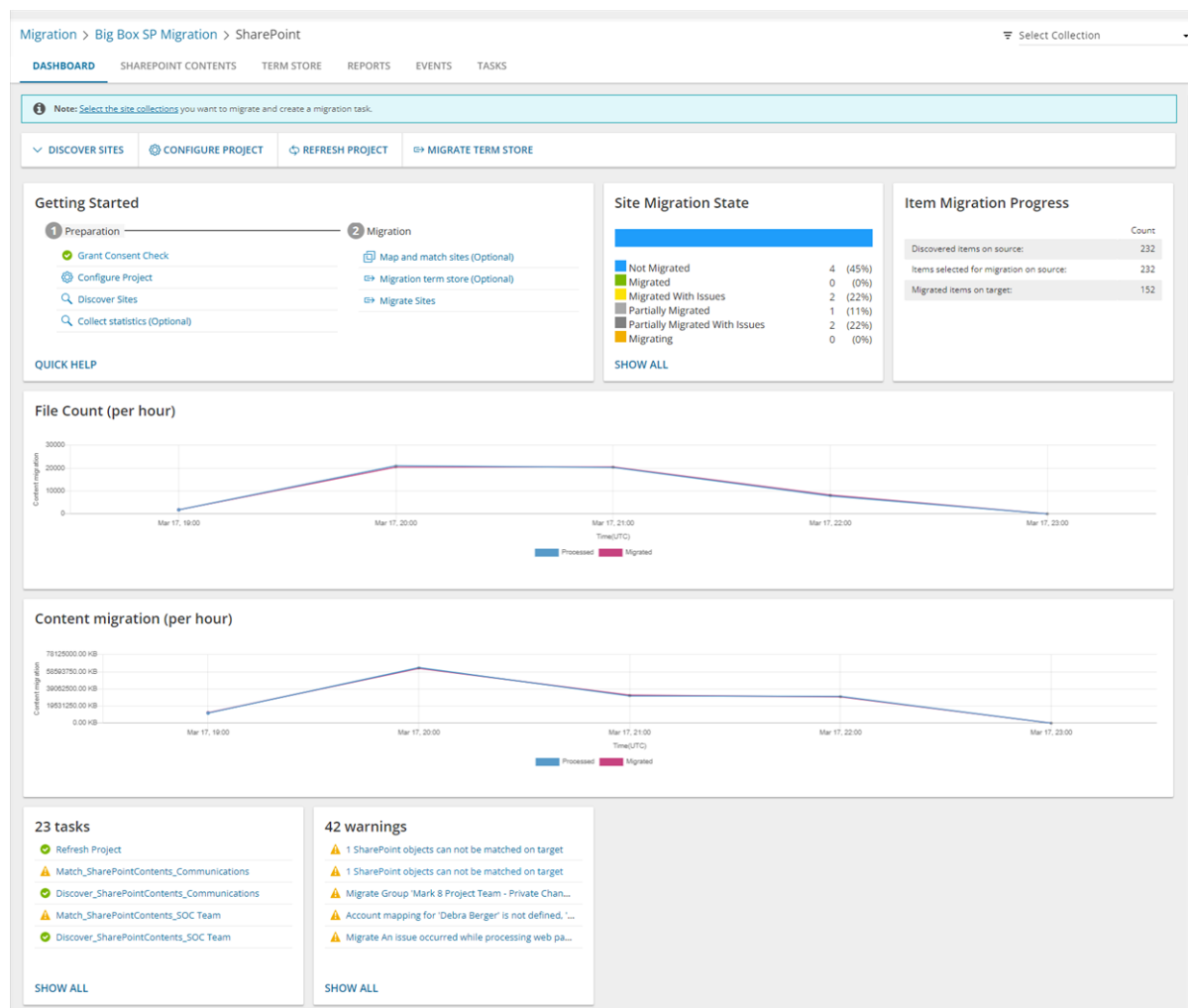
In case necessary admin consents are not granted or expired, discovery will be deactivated and the following notification will be displayed: *Grant admin consent to the Migration module on the Tenants page for both source and target tenants: Basic and SharePoint.* To grant admin consents open **Tenants** 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.

## SharePoint Migration Workspace

In this topic:

- [Dashboard](#)
- [SharePoint Contents](#)
- [Term Store](#)
- [Reports](#)

# Dashboard



The SharePoint migration dashboard presents quick links to help you prepare and migrate SharePoint content with intuitive data points and key performance metrics.



**TIP:** Click **Refresh Project** to get the latest updates for the SharePoint dashboard.

The dashboard sections are described below:

**Notification panell** - displays helpful information that may include links to manage the content migration

**Dashboard Menu** - contains links to the following actions:

- **Discover site collections** - starts the *New Discovery Task* wizard to collect information about SharePoint sites in the source tenant. For more information see [Discovering SharePoint Site Collections](#).
- **Configure project** - starts the Edit Project wizard for configuring migration defaults, SharePoint Admin Center URLs and multi-geo settings. For more information see [Configuring the Project](#).
- **Refresh project** - refreshes the SharePoint migration project settings.

**Getting Started** - presents quick start links to the various actions for preparing and migrating SharePoint content.

**SharePoint site migration status** - indicates the number of SharePoint sites being migrated with a color coded status bar that indicates the migration count of the SharePoint sites.

**Item Migration Progress** - status count of SharePoint content that is discovered in the source tenant and migrated to the target tenant. The following metrics are displayed:

- Discovered items on source
- Items selected for migration on source
- Migrated items on target

**File Count (per hour)** - performance chart that indicates the files migrated per hour.

**Content migration (per hour)** - performance chart that indicates the SharePoint items migrated per hour.

## SharePoint Contents

Type	Name	Provision State	Migration State	Priority	Migration	Source	Source Uri	Target	Target Uri	Template	Task Status	Last Updated	Owner
Site	All Company	Discovered	Discovered	-	-	-	/sites/allcompany	-	-	Team site	New	02/27/20...	All Com...
Site	Ask HR	Discovered	Discovered	-	-	-	/sites/askhr	-	-	Team site	New	02/27/20...	Ask HR C...
Web	Benefits	Discovered	Discovered	-	-	-	/sites/benefits	-	-	Communication	Completed	Today at ...	-
Site	Benefits	Discovered	Discovered	-	-	-	/sites/benefits	-	-	Communication	Completed	Today at ...	MOD Ad...
Members	Benefits members	Discovered	Discovered	-	-	-	/sites/benefits	-	-	-	Completed	Today at ...	-
Site	CEO Connection	Discovered	Discovered	-	-	-	/sites/ceconnecti...	-	-	Team site	New	02/27/20...	CEO Cor...
Site	Communications	Discovered	Discovered	-	-	-	/sites/communica...	-	-	Team site	New	02/27/20...	Communi...
Site	Contoso	Discovered	Discovered	-	-	-	/sites/contoso	-	-	Team site	New	02/27/20...	Contoso
Site	Contoso 511	Discovered	Discovered	-	-	-	/sites/Contoso511	-	-	Team site	New	02/27/20...	Contoso
Site	Contoso Brand	Discovered	Discovered	-	-	-	/sites/ContosoBra...	-	-	Communication	New	02/27/20...	MOD Ad...
Site	Contoso Life	Discovered	Discovered	-	-	-	/sites/contosolife	-	-	Team site	New	02/27/20...	Contoso
Site	Contoso marketing	Discovered	Discovered	-	-	-	/sites/Contosoma...	-	-	Team site	New	02/27/20...	Contoso

The SharePoint Contents List View is comprised of the following components:

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

**Filter panel** - consists of predefined filters for the SharePoint List. See [Filtering](#) for more information about working with filters. The predefined filters are:

- **Task Status** - returns a list of SharePoint objects based on the status of a task that includes this object.
- **Provision State** - returns a list of SharePoint objects based on the current state of the object. Values are *Discovered*, *Matched*, *Provisioned* and *Provisioned With Issues*.
- **Migration State** - returns a list of SharePoint objects based on the migration state of the object and its children. The various values are described below.
- **Priority** - returns a list of SharePoint objects based on the precedence level of this object if it is included in a migration task. Values are *Highest*, *High*, *Medium*, *Low*, and *Lowest*.
- **Migration** - returns a list of SharePoint objects based on whether migration is supported for the site or web template type. Options are *Supported* and *Unsupported*.
- **Type** - returns a list of objects based on the SharePoint object type. Values are *Site*, *Web*, *List*, and *Members*.

**List View Actions Menu** - contains links to SharePoint object migration activities and the search box. Each action is explained in greater detail in subsequent topics. See [Searching](#) for more information about working with the search box.

**List View** - displays information about SharePoint objects in the source and target tenants. Use the **Edit Columns** to show or hide columns in the list. The columns are as described below:

- **Type** - SharePoint object type. Values are Site, Web, List, and Members.
- **Name** - name of the object type.
- **Provision State** - current state of the object. Values are Discovered, Matched, Provisioned and Provisioned With Issues.
- **Migration State** - migration state of the object and its children. Values are:
  - **Not Migrated** - migration has not started
  - **Discovered** - SharePoint objects have been found in the source tenant.
  - **Matched** - a SharePoint object in the source tenant has been matched with a corresponding SharePoint object in the target tenant.
  - **Mapped** - a site in the source tenant has been mapped to another site in the target tenant. Source and target URLs are different.
  - **Provisioned** - On Demand has created (updated) the SharePoint object (site, web, list, users and groups) on the target without warnings or errors.
  - **Queued** - waiting for service resources to be available. For more information, see [How Queuing Works](#).
  - **Migrating** - migration is in progress
  - **Migration Failed** - migration has failed.
  - **Migrated** - migration is successful
  - **Migrated With Issues** - this object or at least one child object had issues with migration
  - **Partially Migrated** - at least one child object has not been migrated
  - **Partially Migrated With Issues** - at least one child object has not been migrated and this object or at least one child object had issues with migration
- **Priority** - indicates the precedence level of this object if it is included in a migration task where the priority is set in the *Schedule* step of the migration wizard. Values are: *Highest*, *High*, *Medium*, *Low* and *Lowest*. The default priority is *Medium*. If the system is busy, the objects are queued. When the system accepts new migration work, objects are taken from the queue based on the assigned priority and age in the queue.
- **Source Location** - geo-location of the source object.
- **Source Url** - object url in the source tenant.
- **Target Location** - geo-location of the target object.
- **Target Url** - object url in the target tenant.
- **Mapped to Different Url** - indicates whether or not the object is mapped to a different url in the target tenant.
- **Template** - SharePoint template used for the source object.
- **Migration** - indicates whether migration is supported for the site or web template type. Values are either Supported or Unsupported.
- **Site Type** - possible values are M365 Groups, Teams, or SharePoint. The Team Site template is associated with M365 Groups. If Teams has been activated on a Team Site template then it is associated with Teams. All other site templates are associated with SharePoint.



- **Site Language** - default language of the source site.
- **Hub** - name of the hub group that the site belongs to if the source site is organized in a hub-spoke relationship.
- **Task Status** - status of the task that is working on this object. Values are New, Stopped, In Progress, Completed with Issues, Failed, and Completed.
- **Last Updated** - most recent date and time when the object information was updated.
- **Owner** - owner account name
- **Source Child Items** - total of all the child lists and libraries in the site or web in the source tenant.
- **Target Child Items** - total of all the child lists and libraries in the site or web in the target tenant.
- **Collections** - indicates the most recent collection where the corresponding SharePoint object is added and the number of additional collections that also contain this object.
- **Source InfoPath Forms** - number of Infopath forms in the source tenant.
- **Source SharePoint Workflows** - number of workflows in the source tenant.

## SharePoint Object Details

When you select a SharePoint object from the List View, the SharePoint Object Detail pane opens. The information in the pane is described below:

- **Map Site, Map Web or Map List** - Click this link to change the name of a specific migrated site, web or list, relocate the object with a different Url or change an unsupported template during migration. For more information, see [Mapping Sites](#), [Mapping Webs](#) or [Mapping Lists](#).
- **Show Parent** - Click this link to discover the parent site of the selected SharePoint content object.
- **Show Content** - Click this link to discover and display the contents of the selected site object
- **Type** - SharePoint object type. Values are Site, Web, List, and Members.
- **Provision State** - current state of the object.
- **Migration State** - migration state of the object and its children.
- **Priority** - indicates the precedence level of this object if it is included in a migration task where the priority is set in the *Schedule* step of the migration wizard. Values are: *Highest*, *High*, *Medium*, *Low* and *Lowest*. The default priority is *Medium*. If the system is busy, the objects are queued. When the system accepts new migration work, objects are taken from the queue based on the assigned priority and age in the queue.
- **Source Url** - object url in the source tenant.
- **Target Url** - object url in the target tenant.
- **Template** - SharePoint template used for the source site or web.
- **Migration** - indicates whether migration is supported for the site or web template type. Values are either Supported or Unsupported.
- **Site Type** - possible values are M365 Groups, Teams, or SharePoint. The Team Site template is associated with M365 Groups. If Teams has been activated on a Team Site template then it is associated with Teams. All other site templates are associated with SharePoint.
- **Site Language** - default language of the source site.
- **Hub** - name of the hub group that the site belongs to if the source site is organized in a hub-spoke relationship.
- **Source Location** - geo-location of the source site.

- **Target Location** - geo-location of the target site.
- **Source Child Webs** - number of child webs of the selected site or web in the source tenant.
- **Target Child Webs** - number of child webs of the selected site or web in the target tenant.
- **Source Child Lists** - number of child lists of the selected site or web in the source tenant.
- **Target Child Lists** - number of child lists of the selected site or web in the target tenant.
- **Source Child Items** - total of all the child lists and libraries in the site or web in the source tenant.
- **Target Child Items** - total of all the child lists and libraries in the site or web in the target tenant.
- **Last Updated** - most recent date and time when the object information was updated.
- **Task Status** - status of the task that is working on this object. Values are New, Stopped, In Progress, Completed with Issues, Failed, and Completed.
- **Tasks** - list of tasks invoked for the selected site.
- **Site Events** (total count) - total count and count of successful, warning and error events that occurred during one or more tasks on the selected site.
- **Events** (total count) - total count and count of successful, warning and error events that occurred during one or more tasks on the selected web or list.
- **All Child Events** (total count) - total count and count of successful, warning and error events that occurred during one or more tasks that operated on the descendants of the selected site.

## Term Store

A term store in SharePoint Online is a global site directory of common terms that are used in your organization. The point of the term store is build consistency in the way that users enter and manage data in your SharePoint environment.

Migration > Multi Geo > SharePoint

[Submit Idea](#) [Select Collection](#)

DASHBOARD SHAREPOINT CONTENTS **TERM STORE** REPORTS EVENTS TASKS

Task Status: Any Migration State: Any

DISCOVER MIGRATE MAP GEO LOCATIONS EXPORT DELETE EDIT COLUMNS 5 objects Search

	Name	Migration State	Source Location	Target Location	Task Status	Last Updated
<input type="checkbox"/>	Term Store - NAM (Central)	Discovered	NAM (Central)	-	New	Last Friday at 2:27 PM
<input type="checkbox"/>	Term Store - GBR	Discovered	GBR	JPN	Completed	Last Friday at 2:53 PM
<input type="checkbox"/>	Term Store - JPN	Migrated	JPN	JPN	Completed	Last Friday at 3:06 PM
<input type="checkbox"/>	Term Store - DEU	Discovered	DEU	-	New	Last Friday at 2:28 PM
<input type="checkbox"/>	Term Store - EUR	Discovered	EUR	-	New	Last Friday at 2:29 PM

The Term Store List View is comprised of the following components:

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

**Filter panel** - consists of predefined filters for the Term Store List. See [Filtering](#) for more information about working with filters. The predefined filters are:

- **Task Status** - returns a list of Term Store items based on the status of a task that operated on this object.
- **Migration State** - returns a list of Term Store items based on the migration state of the object and its children. The various values are described below.

**List View Actions Menu** - contains links to SharePoint object migration activities and the search box. Each action is explained in greater detail in subsequent topics. See [Searching](#) for more information about working with the search box.

**List View** - displays information about Term Stores in the source and target tenants. Use the **Edit Columns** to show or hide columns in the list. The columns are as described below:

- **Name** - name of the Term Store.
- **Migration State** - migration state of the object and its children. Values are:
  - **Not Migrated** - migration has not started.
  - **Discovered** - Term Store item has been found in the source tenant.
  - **Matched** - a Term Store item in the source tenant has been matched with a corresponding SharePoint object in the target tenant.
  - **Mapped** - a Term Store item in the source tenant has been mapped to another Term Store item in the target tenant. Source and target URLs are different.
  - **Provisioned** - On Demand has created (updated) the Term Store item on the target without warnings or errors.
  - **Queued** - waiting for service resources to be available. For more information, see [How Queuing Works](#).
  - **Migrating** - migration is in progress.
  - **Migration Failed** - migration has failed.
  - **Migrated** - migration is successful.
  - **Migrated With Issues** - this item had issues with migration.
  - **Partially Migrated** - at least one Term Store item has not been migrated.
  - **Partially Migrated With Issues** - at least one Term Store item has not been migrated and this item had issues with migration.
- **Source Location** - geo-location of the source Term Store item.
- **Target Location** - geo-location of the target Term Store item.
- **Task Status** - status of the task that operated on this Term Store item. Values are New, Stopped, In Progress, Failed, and Completed.
- **Last Updated** - most recent date and time when the Term Store item information was updated.

## Reports

Migration Reports display error reports about migration tasks. For more information see [Migration Reports](#).

# Configuring the Project

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

5. Click **Configure Project** on the SharePoint project dashboard menu. The *Edit Project* wizard starts

6. **Project Settings**

a. **Set Migration Defaults**

**Default Target User** - Specify the default target user to use as the site collection owner when the existing owner has no match in the target tenant. During the migration, On Demand Migration checks whether accounts associated with the source site are matched with accounts in the target tenant. Depending on the results, one of the following actions is performed:

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	



**NOTE:** Migrated list items and files will retain the source user metadata if the user has not been matched with Accounts in the target tenant. This includes Created by, Modified by and Person column metadata on list items and documents. The default target user is not used for matching list items or files.

b. **Set SharePoint Admin Center Urls**

The SharePoint migration service 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.

- **Source SharePoint Admin Center Url** - Enter the SharePoint Admin Center Url of the source tenant.
- **Target SharePoint Admin Center Url** - Enter the SharePoint Admin Center Url of the target tenant.



**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.

c. Click **Next**.

7. **Multi-Geo settings**

Migrated SharePoint sites can be mapped to geo locations in the target tenant with the *Map Geo Location Task*. The task requires a CSV file that contains the mappings for the migrated sites. For more information about the CSV file format see [Mapping geo locations](#). You can control how the mapping in the target tenant is determined by configuring the following settings:

- a. When the SharePoint project is created a task (Name = Refresh Project) runs. The task determines whether the target is enabled for geo location, and retrieves the set of active geo locations from the

target tenant.

- **Default target geo location** - choose a default geo location from the set of active geo locations discovered in the target tenant.



**NOTE:** If a new geo location is added to the target tenant after the SharePoint project is created, the task (Name = Refresh Project) must be rerun.

- b. Choose an option for migrating sites to a multi-geo tenant.
  - **Use target geo location. If undefined use geo location of source site. Otherwise use default target geo location** - The **Target Location** column in the CSV file that is used for geo mapping sites, will be used by the *Map Geo Location Task* to determine the geo location of the migrated site in the target tenant. If the column value is blank or invalid, the geo location of the site in the **Source Location** column will determine the geo location in the target tenant. If the column value is blank or invalid, the **Default target geo location** will be used.
  - **Use target geo location. If undefined use default target geo location** - The **Target Location** column in the CSV file that is used for geo mapping sites will be used by the *Map Geo Location Task* to determine the geo location of the migrated site in the target tenant. If the column value is blank or invalid, the **Default target geo location** will be used to determine the geo location in the target tenant whether or not a geo location is specified for the site in the **Source Location** column of the CSV file.

8. Click **Finish**.

## Discovering Term Store

When you start a task to discover the term store, the task discovers all the term stores across geo locations in your organization. If your organization has a common location, only one term store will be discovered for the default geo location of your organization. If you have multi-geo enabled, you will see one term store per active region.



**NOTE:** Discovering and migration of term stores is optional. If you don't use managed meta data from the term store in your SharePoint sites then you don't need to discover and migrate the term stores.

### To discover terms stores:

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. From the project *Dashboard* click **Open** in the SharePoint tile.
5. Click the **Term Store** tab.
6. Click **Discover**. The *Discover Term Store* wizard starts. Each step is described below:
7. **Notification**
  - a. **Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
  - **Only in a case of failure** - Select this option to send the email if the discovery task fails to complete successfully.

- b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
  - c. Click **Next**.
8. **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** - task runs immediately.
    - **Run later** - task must be started manually.
    - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
  - b. Click **Next**.
9. **Summary**
- a. Verify the task specifications as described below:
    - i. **Name** - name of the task. The default name is **Discover Term Store**. 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.
10. When the task completes, the *Term Store* list displays the term groups with Migration State = **Discovered** and Task Status = **New**. The *Global Term Store* tile in the *Dashboard* will also indicate the status of the task.

**i** **NOTE:** If you want to migrate SharePoint Term Stores to a geo located target tenant, you must map the discovered source tenant Term Stores to active geo locations in the target tenant. For more information see [Mapping Geo Locations](#).

## Mapping Geo Located Term Stores

If you want to migrate SharePoint Term Stores to a geo located target tenant, you must map the discovered source term stores to active geo locations in the target tenant using a CSV file. This is a two-step process:

### Prepare the CSV file

- i** **NOTE:**
- You need to map only the URLs that will change in the target Tenant.
  - You can download a CSV template when you start the *New Map Geo Locations Term Store Task* wizard and click **Download Example File** from the **Mapping File** step.
  - CSV file names with non-ASCII characters are not supported.

To prepare a CSV file with geo mapped SharePoint sites, use the CSV format described below:

	A	B
1	SourceLocation	TargetLocation
2	DEU	JPN
3	DEU	NAM
4	EUR	NAM
5	EUR	DEU
6	DEU	DEU
7	DEU	JPN
8		

- **Source Location** - column header for the geo location of the source term store. The geo location could be blank if your source tenant is not geo enabled.
- **Target location** - column header for the geo location of the term store in the target tenant. The geo location could be blank if you choose to use the **Default target geo location** in the SharePoint project settings.

### Start the Map Geo Locations From Term Store Task

The New Map Geo Locations Term Store Task wizard maps the geo locations of migrated SharePoint Term Stores based on the mappings in the CSV file described in the previous section.

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. From the project *Dashboard* click **Open** in the SharePoint tile.
5. Click the **Term Store** tab. Then click **More > Map Geo Locations**. The *New Map Geo Locations Term Store Task* wizard starts. Each step is described below:

**New Map Geo Locations Term Store Task**

Mapping File  
Schedule  
Summary

Select a comma-separated value (CSV) file with the custom mapping of the target geo location for sites being migrated to a Multi Geo tenant. Custom mappings will over-ride the default geo location mapping settings set in the Project settings.  
Refer to the documentation for details on the map geo location file format.

Example CSV File [Download Example File](#)

```
SourceLocation,TargetLocation
DEU,JPN
DEU,EUR
NAM,JPN
NAM,EUR
```

[Browse...](#)

Step 1 of 3

[Back](#) [Next](#) [Finish](#) [Cancel](#)

### 6. Mapping File

- a. Click **Browse** and select the CSV file with the geo location mappings that you prepared.
- b. Click **Open** in the File Explorer window to load the file into the wizard

- c. Click **Next**.

## 7. 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** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- b. Click **Next**.

## 8. Summary

- a. Verify the task specifications as described below:
  - i. **Name** - name of the task. The default name is **Map Geo Locations From Term Store 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.

# Discovering Sites

The On Demand Migration for SharePoint service must have a reference list of all the sites that can be migrated to the target tenant.

in this topic:

- [Discovering all sites](#)
- [Discovering sites from a file](#)
- [Reviewing the premigration report](#)



**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 all sites

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

### **To start the Discover Site 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 **Migrate > Projects** to open the *My Projects* list.



3. Create a new project or open an existing project.
4. From the *SharePoint* tile on the project dashboard click **Open**. The SharePoint Migration Workspace opens.
5. Go to the **SharePoint Contents** tab. Then click **Discovery > Discover All Sites**. The *New Discover All Sites Task* wizard starts. Each step is described below:
6. **Notification**
  - a. **Task Name** - name of the task. You can specify a custom name. The default name is **Discover All Sites**.
  - b. **Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
    - **Only in a case of failure** - Select this option to send the email if the discovery task fails to complete successfully.
  - c. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
  - d. Click **Next**.
7. **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** - task runs immediately.
    - **Run later** - task must be started manually.
    - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
  - b. Click **Next**.
8. **Summary**
  - a. Verify the task specifications as described below:
    - i. **Name** - name of the task. The default name is **Discover All Sites**. 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 Provision state of each site is set to **Discovered**.

## Discovering sites from a file

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. This is a two-step process:

### Step 1: Prepare the CSV file



**NOTE:** CSV file names with non-ASCII characters are not supported. Using a CSV file provides the following additional benefits:

- 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 prepare the CSV file in two ways:

- Download the CSV file from the *SharePoint Admin Center*
  1. Log in to the *SharePoint Admin Center* of the source tenant.
  2. From the navigation pane, click **Active sites**.
  3. From the *Active sites* page menu, click **Export** to download the CSV file.
  4. 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.
- Create a new CSV file
  1. Enter the column header **SourceURL**. It is case insensitive. Enter the URLs in the subsequent rows manually.



**NOTE:**

- You can download a CSV template when you start the *New Discover Sites From File Task* wizard and click **Download Example File** from the **Discovery Options** step.
- CSV file names with non-ASCII characters are not supported.

	SourceUrl
2	<a href="https://starzcorp.sharepoint.com/sites/Communications">https://starzcorp.sharepoint.com/sites/Communications</a>
3	<a href="https://starzcorp.sharepoint.com/sites/Starz">https://starzcorp.sharepoint.com/sites/Starz</a>
4	<a href="https://starzcorp.sharepoint.com/sites/StarzBrand">https://starzcorp.sharepoint.com/sites/StarzBrand</a>
5	<a href="https://starzcorp.sharepoint.com/sites/Starzlife">https://starzcorp.sharepoint.com/sites/Starzlife</a>
6	<a href="https://starzcorp.sharepoint.com/sites/Starzmarketing">https://starzcorp.sharepoint.com/sites/Starzmarketing</a>
7	<a href="https://starzcorp.sharepoint.com/sites/StarzNews">https://starzcorp.sharepoint.com/sites/StarzNews</a>
8	<a href="https://starzcorp.sharepoint.com/sites/Starzteam">https://starzcorp.sharepoint.com/sites/Starzteam</a>
9	<a href="https://starzcorp.sharepoint.com/sites/StarzWorks">https://starzcorp.sharepoint.com/sites/StarzWorks</a>
10	

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

## Step 2: Start the 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 **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **SharePoint** tile, or click **Open** from the SharePoint tile to open the SharePoint Migration Workspace.

5. From the menu click **Discovery > Discover Sites from File**. The *New Discover Sites From File Task* wizard starts. Each step is described below:

**New Discover Sites From File Task**

Discovery Options  
Notification  
Schedule  
Summary

Select a comma-separated values (CSV) file that lists the sites to be discovered. Refer to the documentation for details on the site discovery file format.

Example CSV File [Download Example File](#)

```
SourceUri
/sites/SourceSite1
/sites/SourceSite2
/sites/SourceSite3
/sites/SourceSite4
```

[Browse...](#)

Step 1 of 4

[Back](#) [Next](#) [Finish](#) [Cancel](#)

6. **Discovery Options**

- Click **Browse** and locate the CSV file that contains the site collections to be discovered.
- Click **Open** in the File Explorer window to load the file into the wizard.
- Click **Next**.

7. **Notification**

- Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
  - Only in a case of failure** - Select this option to send the email if the discovery task fails to complete successfully.
- Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
- Click **Next**.

8. **Schedule**

- Choose from one of three options to schedule the task. The scheduler will be activated after you complete the task wizard.
  - Run now** - task runs immediately.
  - Run later** - task must be started manually.
  - Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- Click **Next**.

9. **Summary**

- Verify the task specifications as described below:
  - Name** - name of the task. The default name is **Discover Sites from File**. 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.
10. When the task completes, the *SharePoint Contents* list is updated. The Provision state of each site is set to **Discovered**.

## Reviewing the premigration report

1. Select the **Tasks** tab in the SharePoint workspace.
2. Select the **Discover Sites from File** that you want to review.
3. From the task details pane, click **Download Premigration Report**.
4. Download and save the ZIP file to a suitable folder, and extract the report. The report covers all the sites discovered.



**NOTE:** Premigration reports are also available from the **Discover SharePoint Contents** detail pane. This report covers all the site contents for the specific sites selected for this task.

# Mapping Geo Located Sites



## NOTE:

This feature is available if the target tenant is geo-enabled.

We recommend that you run the *Map Geo Location* task before you run the *Mapping from File* task. The *Mapping from File* task sets the geo locations using the default settings, and once the target location is set it can't be reset by the *Map Geo Location* task.

**Workaround:** Delete site from the SharePoint Contents list and rerun the *Discover Site Collections* task.

If you want to migrate SharePoint sites to a geo located target tenant, you must map the discovered source tenant sites to active geo locations in the target tenant using a CSV file. This is a two-step process:

### Step 1: Prepare the CSV file



## NOTE:

- You need to map only the URLs that will change in the target Tenant.
- You can download a CSV template when you start the *New Map Geo Location Task* wizard and click **Download Example File** from the **Mapping File** step.
- CSV file names with non-ASCII characters are not supported.

To prepare a CSV file with geo mapped SharePoint sites, use the CSV format described below:

	A	B	C
1	Source Url	Source Location	Target Location
2	/	DEU	JPN
3	/sites/marketing-usa	DEU	NAM
4	/sites/TeamInEUR	EUR	NAM
5	/sites/TeamInGermany	EUR	DEU
6	/sites/germany-finance	DEU	DEU
7	/sites/japan-manufacturing	DEU	JPN
8			

- **Source Url** - column header for the urls of the site in the source tenant
- **Source Location** - column header for the geo location of the source site. The geo location could be blank if your source tenant is not geo enabled.
- **Target location** - column header for the geo location of the site in the target tenant. The geo location could be blank if you choose to use the **Default target geo location** in the SharePoint project settings.

## Step 2: Start the Map Geo Location Task

The New Map Geo Location Task wizard maps the geo locations of migrated SharePoint sites based on the mappings in the CSV file described in the previous section.

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. From the project *Dashboard* click **Open** in the SharePoint tile.
5. Click the **SharePoint Contents** tab. Then click **More > Map Geo Location from File**. The *New Map Geo Locations Task* wizard starts. Each step is described below:

## 6. Mapping File

- a. Click **Browse** and select the CSV file with the geo location mappings that you prepared.
- b. Click **Open** in the File Explorer window to load the file into the wizard

- c. Click **Next**.

#### 7. **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** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- b. Click **Next**.

#### 8. **Summary**

- a. Verify the task specifications as described below:
  - i. **Name** - name of the task. The default name is **Map Geo Location**. 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.

## Mapping Sites

By default, the OnDemand Migration for SharePoint service will migrate a site using the same relative url and name as the source site. This step is particularly helpful when the source and target sites have different names or are located at different places. You can also change the template of sites with unsupported templates. There are two ways to map sites:

- [Mapping a specific site from the UI](#)
  - Rename site and map url.
  - Replace unsupported site template.
- [Mapping one or more sites with a CSV file](#)

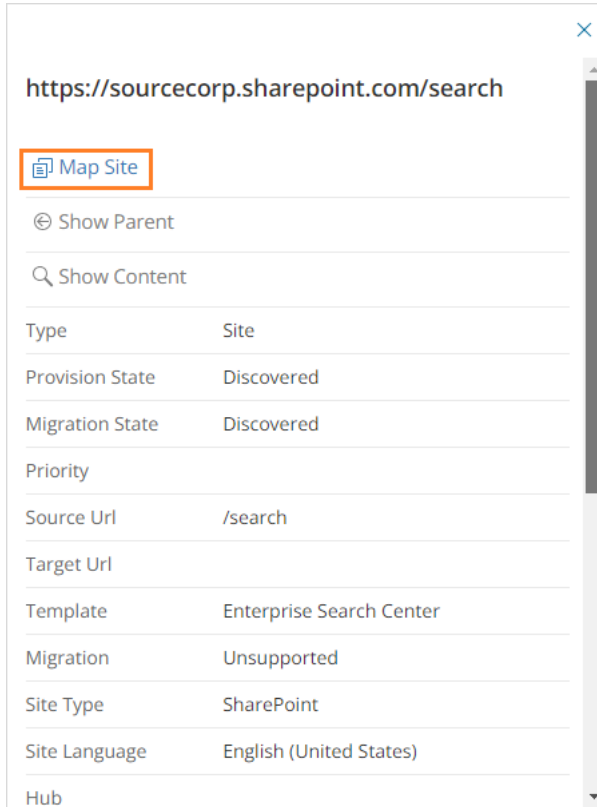
A site cannot be mapped if it was previously migrated in the same project. See the [Considerations](#) topic for details about migration behavior if the target site or sub-site that is mapped, already exists before the migration is started.

### Mapping a specific site from the user interface

To change the name of a specific migrated site, relocate the site with a different Url or change an unsupported template during migration, follow the steps described below.

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.

3. Create a new project or open an existing project.
4. Click the **SharePoint** tile, or click **Open** from the SharePoint tile to open the *SharePoint* Migration Workspace.
5. Go to the **SharePoint Contents** tab.
6. Select a specific site and then click **Map Site** from the site detail pane.



7. The *New Site Mapping Task* wizard starts. Each step is described below:

## 8. Map Settings

**New Site Mapping Task**

Map Settings  
Summary

Type : Site  
Name : Exists  
Template : Team site (no Microsoft 365 group)  
Source Url : /sites/Exists  
Provision State : Discovered  
Migration State : Discovered

Specify the new target site name and url :

New Target Site Name :

New Target Url :

Promote all first level child webs to be migrated as sites  
☐ Promote child webs to sites

Step 1 of 2

Back Next Finish Cancel

- a. Specify the new target site name and url :
  - **New Target Site Name** - specify the new name of the target site (root website) if necessary, or retain the original name.
  - **New Target Url** - specify the relative url in the target tenant or retain the original value. You can specify a different relative url in the target tenant to relocate the site if necessary.
- b. Specify a supported target site template. This option is available if the selected site has an unsupported template.



### NOTE:

To find sites with unsupported site templates, clear the filters in the search ribbon. Then set the following filters: **Migration** = Unsupported and **Type** = Sites

Template mapping is only available for unsupported templates. When you use a supported template, the original site features may not be provisioned. However, supported lists and list items can now be migrated to the target tenant.

**Limitation:** Sites with the "TeamsChannel#0" or "TeamsChannel#1" template cannot be mapped to a different template. These TeamsChannel based sites are provisioned with the ODM Teams provisioning task.

- **New Target Site Template** - choose a supported template. The options are: **Communication** and **Teams site (no Microsoft 365 group)**.



- c. **Promote child webs to sites** - select this option to promote all first level child webs in this site to a new site. Promoted site name and url will be based on the current name of the promoted child web. This option is available for supported sites only. Sites with unsupported templates cannot be promoted.
- d. Click **Next**.

## 9. Summary

- a. Verify the task specifications as described below:
    - **Name** - name of the task. The default name is **Map Single SharePoint Object Task**. You can specify a custom name.
    - **New Target Site Name** - new name of the target site (root website)
    - **New Target Url** - the relative url in the target tenant.
    - **New Target Site Template** - 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 site. The Provision state of the selected site is set to **Mapped**.

## Mapping one or more sites with a CSV file

To change the name of a migrated site or relocate the site with a different Url, use a CSV file to set up a custom map. URLs in a mapping file are case sensitive and must be relative URLs. This is a two-step process:



**NOTE:** If your sites are geo-enabled, we recommend that you run the *Map Geo Location* task before you run the *Mapping from File* task. The *Mapping from File* task sets the geo locations using the default settings, and once the target location is set it can't be reset by the *Map Geo Location* task.

**Workaround:** Delete site from the SharePoint Contents list and rerun the *Discover Site Collections* task.

### Preparing the CSV file

**NOTE:**

- Sites cannot be merged or reorganized with a mapping file.
- Site templates cannot be changed with a CSV file.
- If the target site name is set in the CSV file, then this mapped name is used for the target site instead of migrating the site name from the source.

There are three ways to prepare a CSV site 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**. This must be the first column.
  - e. In the **SourceURL** 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**. 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 **SourceURL** column. This must be the first column.
  - e. Insert a blank column as the second column and specify the header as either **TargetURL**. 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.

**NOTE:**

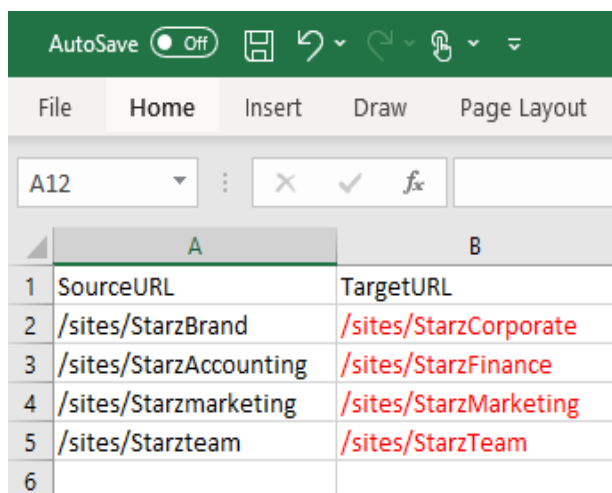
- You need to map only the URLs that will change in the target Tenant.
  - You can download a CSV template when you start the *New Mapping from File Task* wizard and click **Download Example File** from the **Mapping File** step.
  - CSV file names with non-ASCII characters are not supported.
- a. In the first column, specify the header as either **SourceURL**.
  - b. In the second column, specify the header as either **TargetURL**.
  - c. Enter the source and target URLs manually in the subsequent rows. Ensure that only relative

URLs are used.

- d. Save the CSV file. You may rename the file if needed.

**Example 1** - The Target URL is used to rename a site 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`.

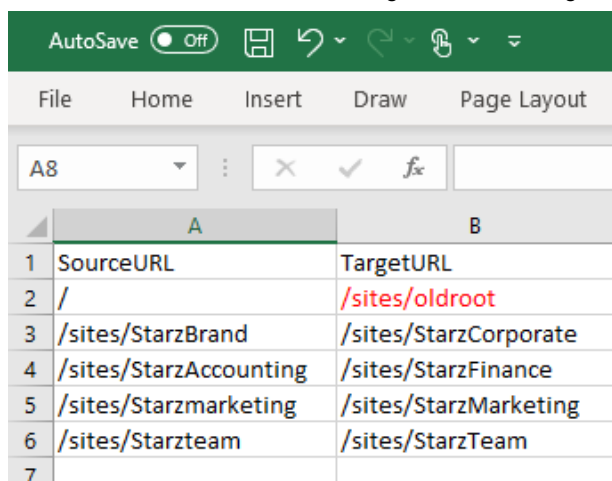


The screenshot shows a spreadsheet application with a green header bar containing 'AutoSave' (Off) and icons for save, undo, redo, and link. The ribbon includes 'File', 'Home', 'Insert', 'Draw', and 'Page Layout'. The active cell is A12. The table below is a mapping of SourceURL to TargetURL.

	A	B
1	SourceURL	TargetURL
2	<code>/sites/StarzBrand</code>	<code>/sites/StarzCorporate</code>
3	<code>/sites/StarzAccounting</code>	<code>/sites/StarzFinance</code>
4	<code>/sites/Starzmarketing</code>	<code>/sites/StarzMarketing</code>
5	<code>/sites/Starzteam</code>	<code>/sites/StarzTeam</code>
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`.



The screenshot shows a spreadsheet application with a green header bar containing 'AutoSave' (Off) and icons for save, undo, redo, and link. The ribbon includes 'File', 'Home', 'Insert', 'Draw', and 'Page Layout'. The active cell is A8. The table below is a mapping of SourceURL to TargetURL.

	A	B
1	SourceURL	TargetURL
2	<code>/</code>	<code>/sites/oldroot</code>
3	<code>/sites/StarzBrand</code>	<code>/sites/StarzCorporate</code>
4	<code>/sites/StarzAccounting</code>	<code>/sites/StarzFinance</code>
5	<code>/sites/Starzmarketing</code>	<code>/sites/StarzMarketing</code>
6	<code>/sites/Starzteam</code>	<code>/sites/StarzTeam</code>
7		

### Start the Mapping from File 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 **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.

4. Click the **SharePoint** tile, or click **Open** from the SharePoint tile to open the *SharePoint* Migration Workspace.
5. Go to the *SharePoint Contents* tab.
6. From the *Actions* toolbar, click **More> Map from File**. The *New Mapping from File Task* wizard starts. Each step is described below:

**New Mapping from File Task**

Mapping File | Schedule | Summary

Select a comma-separated values (CSV) file with custom mapping of source and target site collections. Refer to the [documentation](#) for details on the mapping file format.

Example CSV File [Download Example File](#)

SourceUrl	TargetUrl
/sites/SourceSite1	/sites/TargetSite1
/sites/SourceSite2	/sites/TargetSite2
/sites/SourceSite3	/sites/TargetSite3
/sites/SourceSite4	/sites/TargetSite4

[Browse...](#)

Step 1 of 3

[Back](#) [Next](#) [Finish](#) [Cancel](#)

## 7. 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. 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** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- b. Click **Next**.

## 9. Summary

- a. Verify the task specifications as described below:
  - i. **Name** - name of the task. The default name is **Mapping from File 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 Provision state of each matched site is set to **Mapped**.

## Matching Sites

To check if the site already exists on the target or it is correctly mapped, match the source sites with the corresponding target sites using a Matching Task. If a match is found the site state is set to **Matched** and the target Url is updated. Discovered content for the selected sites can also be matched using the **Include child site structure** setting in the *New Matching Task* wizard.

This step is optional. The SharePoint migration service will match and migrate the source site to the existing target site (the target site and content will be replaced), or create the site as needed base on the default or site mapping.

### To match sites:

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **SharePoint** tile, or click **Open** from the SharePoint tile to open the SharePoint Migration Workspace.
5. Click the **SharePoint Contents** tab from to open the *SharePoint Contents* list view.
6. Choose one or more sites by selecting the respective check box for the sites. You can select the check box in the column header to select all sites.
7. Click **More > Match** from the *Actions* ribbon. The *New Matching Task* wizard starts. Each step is described below:
8. **Matching Option**
  - **SharePoint objects selected** - indicates the number of sites selected for matching.
  - **Include child site structure** - select this option to include matching discovered site content (webs and other descendant objects) with the matching task. This will increase the task run time significantly.
9. **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** - task runs immediately.
    - **Run later** - task must be started manually.
    - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.

- b. Click **Next**.
10. **Summary**
  - a. Verify the task specifications as described below:
    - i. **Name** - name of the task. The default name is **Matching 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 webs and other descendant objects.
  - b. Click **Back** to revise or review a previous step or click **Finish** to complete the task wizard and start the task as scheduled.
11. You can track the progress in the *Tasks* tab, monitor alerts and notifications in the *Events* tab and view the summary on the *Dashboard*.
12. 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 Provision state of each matched site is set to **Matched**.

## Collecting Statistics

A **Collect SharePoint Statistics Task** conducts an assessment of selected SharePoint sites, webs and lists in the source tenant and matching sites in the target tenant.



**NOTE:** Before you proceed, verify that the source tenant sites have been discovered. For more information see [Discovering SharePoint Sites](#)

In this topic:

- [Create and run an Collect SharePoint Statistics Task](#)
- [Review the Collect SharePoint Statistics Task](#)
- [Review the statistics collected](#)
- [Review the events for the Collect SharePoint Statistics Task](#)

### Create a Collect SharePoint Statistics Task

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **SharePoint** tile, or click **Open** from the Mail tile to open the *sites and User Data* dashboard.
5. Select the **Sites** tab and then select **List View** if not already selected. Then select one or more SharePoint sites from the list to activate the menu options.
6. From the *Actions* menu, click **Collect Statistics**. The *New Collect SharePoint Statistics Task* wizard starts. Each step is described below:

## 7. Description

**New Collect Statistics Task**

Options  
Notification  
Schedule  
Summary

Collect properties and counts from the selected SharePoint source objects and generate reports.  
SharePoint objects selected 1

Discover and collect statistics of the SharePoint contents and structure for the selected source objects.  
☒ Include collection of statistics for source content and structure

Collect statistics from the matching target SharePoint objects, and generate a comparison report.  
☐ Include collection of statistics from the matching target SharePoint objects

Step 1 of 4

Back Next Finish Cancel

- Include collection of statistics for source content and structure** - select this option to discover and collect statistics of the SharePoint contents and structure for the selected source objects.
- Include collection of statistics from the matching target SharePoint objects** - select this option to collect statistics from the matching SharePoint objects in the target tenant and generate the [Comparison Report](#).
- Click **Next**.

## 8. Notification

- Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
  - Only in a case of failure** - Select this option to send the email if the discovery task fails to complete successfully.
- Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
- Click **Next**.

## 9. Schedule

- Choose from one of three options to schedule the task. The scheduler will be activated only after you complete the task wizard.
  - Run now** - task runs immediately.
  - Run later** - task must be started manually.
  - Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- Click **Next**.

## 10. Summary

- Verify the task specifications as described below:
  - Name** - name of the task. You can specify a custom name. The default name is **Collect SharePoint Content Statistics Task**

- 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.

## Review the Collect SharePoint Statistics Task

1. Open the **Tasks** tab.
2. Select the Collect SharePoint 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 *SharePoint*.
  - b. **Created** - date and time when the task was created.
  - c. **Modified** - date and time when the task was last updated.
  - d. **State** - state of the task.
  - e. **Last Operation** - 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. **Contents (number)** - number of objects processed and their task status.
  - h. **Events (number)** - number of events that the task encountered.

## Review the statistics collected

1. Open the **Tasks** tab.
2. Select the Collect SharePoint Statistics Task that you want to review.
3. From the task details pane, click **Download Premigration Report**. If comparison reports were generated, click **Download comparison report**.
4. Download and save the ZIP file to a suitable folder, and extract the report.

## Review the Collect SharePoint Statistics Task Events

1. Open the **Tasks** tab.
2. Select a task named **Collect SharePoint 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** - name of the SharePoint object if applicable.
  - b. **Task** - name of the task.
  - c. **Time** - date and time when the event occurred.
  - d. **Category** - type of task. the value is **Application**.



# Managing Sites with Collections

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

Migrating large numbers of SharePoint site collections requires careful planning. The site collections could belong to different offices and geographical locations or sensitive departments. Organize the SharePoint site collections into logical groups called *collections* to make large SharePoint site collections more manageable. SharePoint sites, webs and lists can be grouped in *collections*.

In this topic:

- [Adding Accounts to Collections](#)
- [Working with the Collections Dashboard](#)

## Adding SharePoint site collections to Collections

You can add SharePoint site collections to *collections* in three ways:

- [Select the SharePoint site collections and create a new collection](#)
- [Select the SharePoint site collections and add to an existing collection.](#)
- [Use a CSV file to create one or more collections of SharePoint site collections.](#)

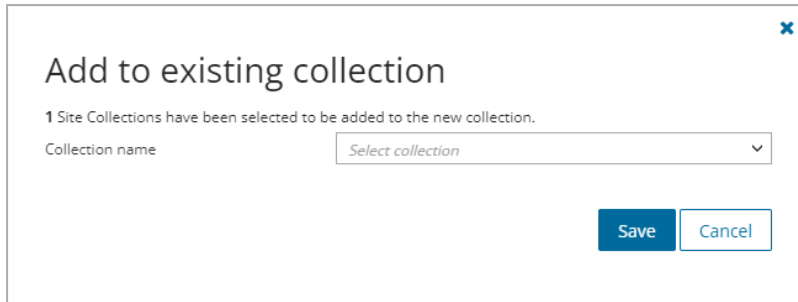
### ***To add selected SharePoint site collections to a new collection:***

1. From the project dashboard, click **Open** in the *SharePoint* tile to open the *SharePoint* workspace.
2. Select the **SharePoint Contents** tab.
3. Select the SharePoint site collections you want to combine into a collection.
4. From the actions toolbar, click **Collections > Create New Collection**. The *New Collection* dialog opens.
5. Enter a collection name in the **Collection name** field and click **Save** to add the selected SharePoint site collections to the collection.

### ***To add selected SharePoint site collections to an existing collection:***

1. From the project dashboard, click **Open** in the *SharePoint* tile to open the *SharePoint* workspace.
2. If you need to create a new collection:
  - a. From the top-right corner of the workspace, click **Select Collection > + New Collection**
  - b. Enter a collection name and click **Save** to add this collection to the project.
3. From the actions toolbar, click the **SharePoint Contents** tab and select the site collections that you want to add to the collection.

- Click **Collections > Add to Collection**. The *Add to existing collection* dialog opens.



The dialog box titled "Add to existing collection" has a close button (X) in the top right corner. Below the title, it says "1 Site Collections have been selected to be added to the new collection." There is a label "Collection name" followed by a dropdown menu with the text "Select collection" and a downward arrow. At the bottom right, there are two buttons: "Save" (in blue) and "Cancel" (in white with a blue border).

- Select a collection from the **Collection name** dropdown and click **Save** to add the selected SharePoint sites to the collection.

#### **To add sites to one or more collections with a CSV file:**


Using a CSV file provides the following additional benefits:

- Multiple collections can be created with the same CSV file.
- Existing collections can be specified in the CSV file to add additional sites.
- SharePoint sites can be listed in multiple collections.

This is a two-step process as described below:

#### **Step 1: Prepare the CSV file**

- From the actions toolbar, click **Collections > Import Collections**. The *New Import Collections from File Task* wizard starts.
- From the **Mapping File** step, click **Download Example File**. A ZIP file is downloaded.
- Extract the CSV file and use it to prepare your import file in one of three formats described below:

 **NOTE:** CSV file names with non-ASCII characters are not supported. SharePoint sites in the CSV that have not been discovered cannot be added to a collection.

	A	B
1	SourceURL	Collection
2	/sites/Americas	Marketing
3	/sites/APAC	Marketing
4	/sites/ServicePortal	Human Resources
5	/sites/Community	Human Resources
6		

- **SourceURL** - site collection URL.
- **Collection** - collection name.

#### **Step 2: Import the CSV file**

- Open the **SharePoint Contents** tab.
- From the actions toolbar, click **Collections > Import Collections**. The *New Import Collections from File Task* wizard starts.

### 3. Mapping File

- a. Click **Browse** and select the CSV file. The selected CSV file name appears.

### 4. 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** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- b. Click **Next**.

### 5. Summary

- a. Verify the task specifications as described below:
  - i. **Name** - name of the task. The default name is **Import Collections From File**. You can specify a custom name.
  - ii. **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.
- c. Click **Finish**.

#### *To gather a site and all its children into a collection*

1. From the top-right corner of the workspace, click **Select Collection** and then select the collection to view.
2. If needed, add one or more SharePoint sites to the collection
3. Select one or more sites.
4. Run the **Discover SharePoint Contents** task.



**NOTE:** SharePoint content discovered during a migration will be added to the collection as well if the parent site collection is present .

#### *To verify the addition of the SharePoint objects to a collection:*

1. Check the **Collections** column in the SharePoint Contents List View that indicates the most recent collection where the object has been added and the number of additional collections that also contain the object.
2. Select an object from the List View to open the SharePoint Detail pane. Check the **Collections** property that lists all the collections where the object has been added.

## Working with the Collection Dashboard

The Collection Dashboard shows the collection-specific summary, allows you to see SharePoint site collections added to it, create tasks for them, and monitor the progress of tasks.

#### *To view the collection dashboard for an existing collection:*

- a. Log in to Quest On Demand and choose an organization if you have multiple organizations.
- b. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
- c. Create a new project or open an existing project.
- d. From the project dashboard, click **Open** in the *SharePoint* tile to open the *SharePoint* workspace.
- e. From the top-right corner of the workspace, click **Select Collection** and then select the collection to view. The collection *Dashboard* is displayed.
- f. Click the **SharePoint Contents** tab. You will see the list of SharePoint site collections that belong to the collection.

***To remove items from a collection:***

- a. From the actions toolbar, click **Collections > Remove from Collection**.
- b. In the confirmation dialog click **Remove** to remove the selected objects from the collection.

***To rename the collection:***

- a. Click **Collections > Rename Collection** in the Actions toolbar of the collections dashboard.

***To delete the collection:***

- a. Click **Collections > Delete Collection** in the Actions toolbar of the collections dashboard.

***To see the tasks for collection-specific SharePoint objects:***

- a. Open the **Tasks** tab.

***To see the events related to the collection:***

- a. Open the **Events** tab.

***To return to the SharePoint migration workspace:***

- a. Click the collection dropdown at the top-right corner of the page, and select **Show All**.

## 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.

In this topic:

- [Starting a Discover SharePoint Contents Task](#)
- [Viewing the SharePoint contents](#)
- [Reviewing the premigration report](#)

## Starting a Discover SharePoint Contents Task

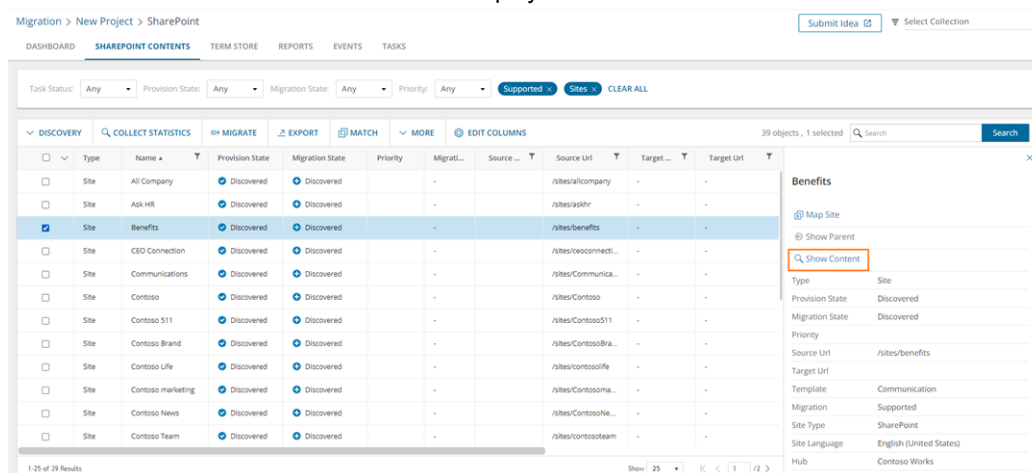
1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **SharePoint** tile, or click **Open** from the SharePoint tile to open the *SharePoint* migration workspace.
5. Click the **SharePoint Contents** tab to open the *SharePoint Contents* list view.
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 **Discovery > Discover SharePoint Contents** from the *Actions* ribbon. The *New Discover SharePoint Contents Task* wizard starts. Each step is described below:
8. **Options**
  - a. **Task Name** - name of the task. You can specify a custom name. The default name is **Discover SharePoint Contents**.
  - b. **Collect forms and workflow statistics** - select this option to count the number of Infopath forms and workflows associated with the selected sites.
  - c. Click **Next**.
9. **Notification**
  - a. **Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
    - **Only in a case of failure** - Select this option to send the email if the discovery task fails to complete successfully.
  - b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
  - c. Click **Next**.
10. **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** - task runs immediately.
    - **Run later** - task must be started manually.
    - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
  - b. **Priority** - select a priority from the dropdown for the objects scheduled for migration with this task . Values are: **Highest**, **High**, **Medium**, **Low** and **Lowest**. The default priority is **Medium**. If the system is busy, the objects are queued (Migration state = Queued). When the system accepts new migration work, objects are taken from the queue based on the assigned priority and age in the queue.
  - c. Click **Next**.

## 11. Summary

- a. Verify the task specifications as described below:
  - i. **Name** - name of the task. You can specify a custom name. The default name is **Discover SharePoint Contents**.
  - 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.

## Viewing the SharePoint contents

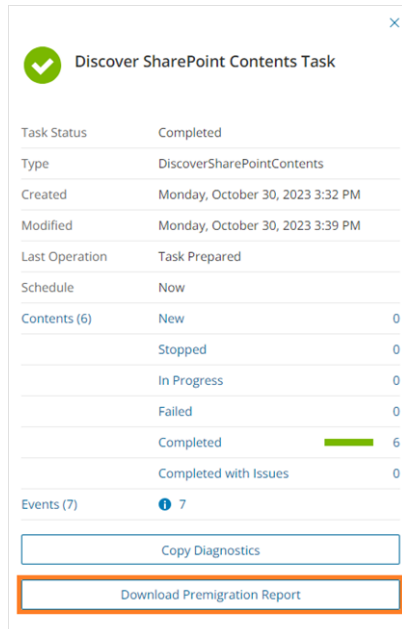
1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **SharePoint** tile, or click **Open** from the SharePoint tile to open the *SharePoint* migration workspace.
5. Click the **SharePoint Contents** tab 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 dropdown list. 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 dropdown list. The list of content types are displayed.

## Reviewing the premigration report

1. Select the **Tasks** tab in the SharePoint workspace.
2. Select the **Discover SharePoint Contents Task** that you want to review.
3. From the task details pane, click **Download Premigration Report**.



4. Download and save the ZIP file to a suitable folder, and extract the report.

**NOTE:** This premigration report covers all the site contents for the specific sites selected for this task. Premigration reports for all sites (excluding site contents) are also available from the following tasks:

- Discover All Sites
- Discover Sites from File

## Comparing Site Contents

The **Compare SharePoint Content** task compares items in the list between source and target tenants.

- For tasks that include site and web all the child list and libraries will be compared.
- Comparison is only supported for list and libraries previously migrated by the ODMSP service.
- Comparison is done based on the item's UniqueID which is maintained when the ODMSP service migrates an item to the target. List item, files and folders are compared.

In this topic:

- [Starting a Compare SharePoint Contents Task](#)
- [Reviewing the comparison report](#)

## Starting a Compare SharePoint Contents 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 **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **SharePoint** tile, or click **Open** from the SharePoint tile to open the *SharePoint* migration workspace.
5. Click the **SharePoint Contents** tab to open the *SharePoint Contents* list view.
6. Choose one or more sites, webs or lists that have been previously migrated, by selecting the respective check boxes.
7. Click **More > Compare** from the *Actions* ribbon. The *New SharePoint Compare Task* wizard starts. Each step is described below:
8. **Notification**
  - a. **Task Name** - name of the task. You can specify a custom name. The default name is **Compare SharePoint Content**.
  - b. **Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
    - **Only in a case of failure** - Select this option to send the email if the discovery task fails to complete successfully.
  - c. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
  - d. Click **Next**.
9. **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** - task runs immediately.
    - **Run later** - task must be started manually.
    - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
  - b. **Priority** - select a priority from the dropdown for the objects scheduled for migration with this task . Values are: **Highest, High, Medium, Low** and **Lowest**. The default priority is **Medium**. If the system is busy, the objects are queued (Migration state = Queued). When the system accepts new migration work, objects are taken from the queue based on the assigned priority and age in the queue.
  - c. Click **Next**.
10. **Summary**
  - a. Verify the task specifications as described below:
    - i. **Name** - name of the task. You can specify a custom name. The default name is **Compare SharePoint Content**.
    - ii. **Source tenant** - name of the tenant where the statistics will be collected.
    - iii. **SharePoint objects selected** - number of SharePoint object that are selected for



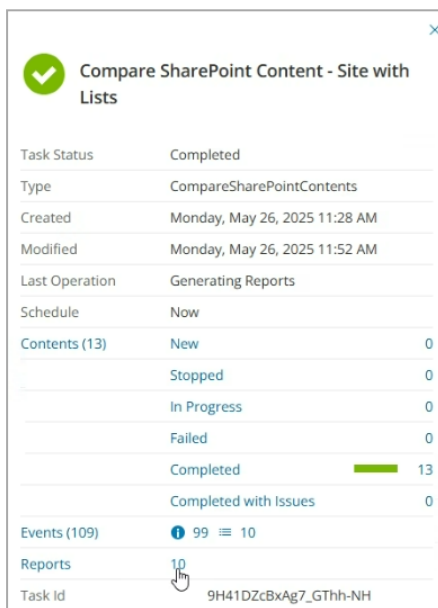
comparison.

- iv. **Priority** - the priority of this task.
- b. Click **Back** to revise or review a previous step or click **Finish** to complete the task wizard and start the task as scheduled.

## Reviewing the comparison report

One report is generated for each list in the site, web or lists selected. All items are included in the CSV report for lists that contain up to 100,000 items. For lists above 100,000, all matched items are not included in the CSV report, but only differences are reported.

1. Select the **Tasks** tab in the SharePoint workspace.
2. Select the **Compare SharePoint Content** task (or whatever custom name you have assigned).
3. From the task details pane, click **Reports**. The *Reports* list opens with a predefined filter on the task that you selected.



4. From the *Reports* list, select a list and click **Download** from the **Download Log** column to save the CSV file to your default download folder.
5. The **Comparison Status** column has the following values:
  - **Matched** - items with the same ID are on source and target with same modified date.
  - **Only on source** - item is only on source.
  - **Only on target** - item is only on target.
  - **Newer on source** - version of item with the same ID is newer on the source than the target.
  - **Newer on target** - version of item with the same ID is newer on the target than the source.
  - **Different name** - Items with the same ID but different names are on the source and target i.e. file was renamed.
    - You can check the **Modified date** to determine which is newer.

- **Different location** - Item with same ID but in a different location or path are on the source and target i.e. file was moved within the list.
  - Modified date remains the same as the move operation in SharePoint does not change the modified date.
  - If a file was renamed and moved it is indicated as **Different Location**.

## Mapping Webs

Webs or sub-sites that have not been migrated can be renamed, mapped to a different parent, or promoted to a site in the target tenant. When these objects are migrated, they will be renamed, relocated to the new parent or promoted to a site. The web is retained in the source tenant but set as Relocated (ie., not migratable)

The conditions for mapping a web to another web are as follows:

- Web has not been previously migrated.
- Web is not a root web.

If a web is promoted to a site, then:

- Site must have a new name.
- A new site and member objects are cloned from the web's parent site.
- Web is cloned as the root web of the new site.
- Children of the web are re-parented under the cloned web.
- Migrate the new site to complete the migration of the promoted web

**Example:** Consider the promotion of a web (\sites\HR\Benefits) to a site (\sites\HR-Benefits). When the task completes, the **SharePoint Contents** list will display the following:

Type	Name	Source URL	Target URL
Site	HR	\sites\HR	
Web	HR	\sites\HR	
Site	HR-Benefits	\sites\HR	\sites\HR-Benefit
Web	HR-Benefits	\sites\HR	\sites\HR-Benefit

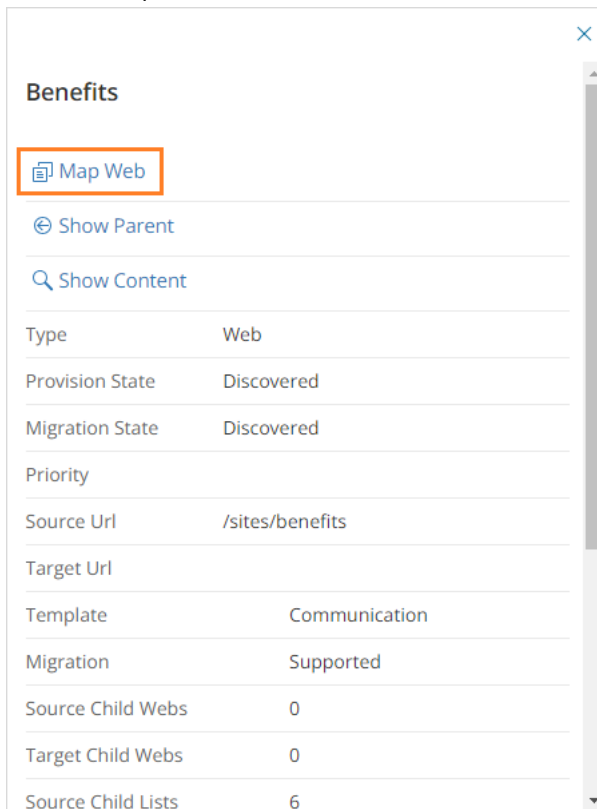
### Limitations

- Links from the source web may not be updated on target. For example, links to the old parent.
- For webs with unique SP Groups the groups may be duplicated.

### To map a web

1. Open the **SharePoint contents** tab and locate the list. You can use the list filter **Type** = Web to narrow down your search.

2. Select a web that has not been migrated. You can select only one web at a time. Then click **Map Web** from the list detail pane.



**Benefits**

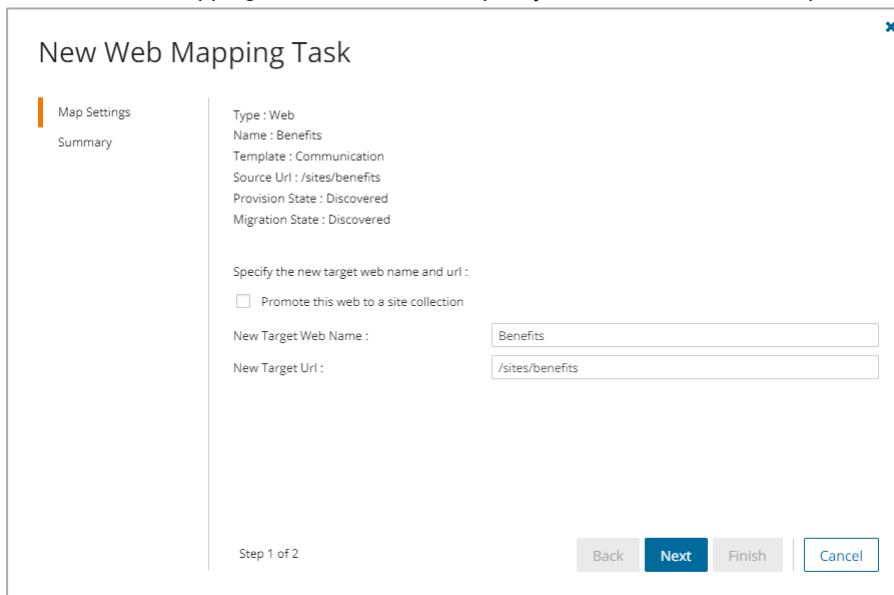
[Map Web](#)

[Show Parent](#)

[Show Content](#)

Type	Web
Provision State	Discovered
Migration State	Discovered
Priority	
Source Url	/sites/benefits
Target Url	
Template	Communication
Migration	Supported
Source Child Webs	0
Target Child Webs	0
Source Child Lists	6

3. The *New Web Mapping Task* wizard starts. Specify the information in the steps described below:



**New Web Mapping Task**

Map Settings

Summary

Type : Web  
Name : Benefits  
Template : Communication  
Source Url : /sites/benefits  
Provision State : Discovered  
Migration State : Discovered

Specify the new target web name and url :

☐ Promote this web to a site collection

New Target Web Name :

New Target Url :

Step 1 of 2

[Back](#) [Next](#) [Finish](#) [Cancel](#)

#### 4. Map Settings

- a. **Promote this web to a site collection** - select this option to promote the web to a site. Webs with unsupported templates cannot have the template remapped and be promoted to site, so this setting will be displayed if the selected web has a supported template.
- b. Specify the new name and relative url
  - **New Target Web Name** - specify the new name of the target web if necessary, or retain the original name if you want to relocate the web.
  - **New Target Url** - Enter the new relative url of the web if you plan to relocate the web. This option is not available if the web is promoted to a site.
- c. Specify a supported target web template. This option is available if the selected site has an unsupported template.



#### NOTE:

To find webs with unsupported web templates, clear the filters in the search ribbon. Then set the following filters: **Migration** = Unsupported and **Type** = Web

When you use a supported template, the original web features may not be provisioned. However, supported lists and list items can now be migrated to the target tenant.

- **New Target Web Template** - choose **Teams site (no Microsoft 365 group)** from the dropdown.

New Web Mapping Task

Map Settings  
Summary

Type : Web  
Name : Unsupported Search  
Template : Basic Search Center (Unsupported)  
Source Url : /sites/Modern/UnsupportedSearch  
Provision State : Discovered  
Migration State : Discovered

Specify the new target web name and url :

New Target Web Name :

New Target Url :

Specify a supported target web template :

New Target Web Template :

Step 1 of 2

Back Next Finish Cancel

- d. Click **Next**.

#### 5. Summary

- a. Verify the task specifications as described below:
  - **Name** - name of the task. The default name is **Map Single SharePoint Object Task**. You can specify a custom name.
  - **New Target Web Name** - new name of the target web
  - **New Target Url** - relative url of the site or web in the target tenant.
- b. Click **Back** to revise or review a previous step or click **Finish** to complete the task wizard and start the task as scheduled.

6. You can track the progress in the *Tasks* tab, monitor alerts and notifications in the *Events* tab and view the summary on the *Dashboard*.
7. When the task completes, the *SharePoint Contents* list is updated. Compare the *Source Url* column with the *Target Url* column for the selected web. The Provision state of the selected web is set to **Mapped**.

## Mapping Lists

Lists or libraries that have not been migrated can be mapped to a different web on the target tenant or mapped to an existing list. When these objects are migrated, they can be relocated to the new SharePoint web or merged with a target list. This web can be in the same site or a different site.

- The web in the target tenant must exist before the mapping otherwise mapping will fail.
- Previously migrated lists cannot be mapped to a different web.
- The source and target lists must have the same template type.
- The list mapping will be used by a migration task that includes the list.
- If lists are merged during migration, then
  - List objects merged
    - Content types
    - List columns
    - List Items (with permissions)
  - List objects not merged
    - List settings including Title and Description
    - List Permissions
    - Views
    - Alerts

### ***To map a list to a different site or web***

1. Open the **SharePoint Contents** tab and locate the list. You can use the list filter **Type** = List to narrow down your search.
2. Select a list that has not been migrated. You can select only one list at a time. Then click **Map List** from the list detail pane.

**Documents**

[Map List](#)

[Show Parent](#)

[Show Content](#)

Type	List
Provision State	Discovered
Migration State	Discovered
Priority	
Source Url	/sites/leadership-connection/Shared Documents
Target Url	
Source Child Items	1
Target Child Items	0
Source InfoPath Forms	
Source SharePoint Workflows	

3. The *New List Mapping Task* wizard starts. Specify the information in the steps described below:

4. **Map Settings**

**New List Mapping Task**

Map Settings | Summary

Type : List  
Name : Documents  
Source Url : /sites/leadership-connection/Shared Documents  
Provision State : Discovered  
Migration State : Discovered

New Target Url:

☒ Migrate source list to target  
☐ Merge source list contents with target list

Step 1 of 2

[Back](#) [Next](#) [Finish](#) [Cancel](#)

- a. Specify the new name and relative url
    - **New Target Url** - Enter the new name of the list or retain the original name. You can specify a different url in the target tenant to relocate the site if necessary.
  - b. Choose a the mapping option
    - **Migrate source list to target** - select this option to migrate the contents of the source list to the specified target list
    - **Merge source list contents with target list** - select this option to merge the contents of the source list with the specified target list.
  - c. Click **Next**.
5. **Summary**
- a. Verify the task specifications as described below:
    - **Name** - name of the task. The default name is **Map Single SharePoint Object Task**. You can specify a custom name.
    - **New Target Url** - the relative url of the site or web in the target tenant.
    - **Map option** - 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.
6. You can track the progress in the *Tasks* tab, monitor alerts and notifications in the *Events* tab and view the summary on the *Dashboard*.
7. When the task completes, the *SharePoint Contents* list is updated. Compare the *Source Url* column with the *Target Url* column for the selected list. The Provision state of the selected list is set to **Mapped**.

## Migrating Term Stores



**NOTE:** Discovering and migration of term stores is optional. If you don't use managed meta data from the term store in your SharePoint sites then you don't need to discover and migrate the term stores.

Term store migration for multi-geo site deployments are supported. Term groups that are not in the Central region must be migrated separately by migrating the regional Term Store.

If you want to migrate SharePoint Term Stores to a geo located target tenant, you must map the discovered source tenant Term Stores to active geo locations in the target tenant. For more information see [Mapping Geo Locations](#).

### **To migrate terms stores:**

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. From the project *Dashboard* click **Open** in the SharePoint tile.
5. Click the **Term Store** tab.
6. Select the term stores to migrate. You can select multiple term stores.
7. Click **Migrate**. The *Migrate Term Store* wizard starts. Each step is described below:

## 8. Notification

- a. **Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
  - **Only in a case of failure** - Select this option to send the email if the discovery task fails to complete successfully.
- b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
- c. Click **Next**.

## 9. 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** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- b. Click **Next**.

## 10. Summary

- a. Verify the task specifications as described below:
  - i. **Name** - name of the task. The default name is **Migrate Term Store**. 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.

11. When the task completes, the *Term Store* list displays the term groups with Migration State = **Migrated** and Task Status = **Completed**. The *Global Term Store* tile in the *Dashboard* will also indicate the status of the task.

Migration > Multi Geo > SharePoint Submit Idea Select Collection

DASHBOARD SHAREPOINT CONTENTS **TERM STORE** REPORTS EVENTS TASKS

Task Status: Any Migration State: Any

DISCOVER MAP GEO LOCATIONS EXPORT DELETE EDIT COLUMNS 5 objects

<input type="checkbox"/>	Name	Migration State	Source Location	Target Location	Task Status	Last Updated
<input type="checkbox"/>	Term Store - NAM (Central)	Discovered	NAM (Central)	-	New	Last Friday at 2:27 PM
<input type="checkbox"/>	Term Store - GBR	Discovered	GBR	JPN	Completed	Last Friday at 2:53 PM
<input type="checkbox"/>	Term Store - JPN	Migrated	JPN	JPN	Completed	Last Friday at 3:06 PM
<input type="checkbox"/>	Term Store - DEU	Discovered	DEU	-	New	Last Friday at 2:28 PM
<input type="checkbox"/>	Term Store - EUR	Discovered	EUR	-	New	Last Friday at 2:29 PM



# Migrating SharePoint Content

Use the **SharePoint Contents** tab to migrate SharePoint objects like sites, lists, web, members, retention policies and InfoPath forms. You can migrate an entire site or initiate a granular or incremental migration. You can navigate through SharePoint site objects and identify any site objects that failed to migrate.

## Incremental migration

Incremental migration (or remigration) is typically used to synchronize and repair lists in the target tenant. When a list is remigrated, 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.

- All child lists can be repaired and refreshed during migration of sites and webs.
- Lists in the **Migrated with Issues** state will be repaired if the **Refresh list items** option is selected for the migration task.
- Lists in the **Migrated** state do not need to be repaired, and only an incremental migration will be done.

**i** **NOTE:** The change token used by the migration service for incremental migration remains active for 60 days. It is recommended to perform an incremental migration every 50 days to make sure the change token remains active.

In this topic:

- [Migrating Record Center Retention Policies and InfoPath Forms](#)
- [Starting a SharePoint migration task](#)

## Migrating Record Center Retention Policies and InfoPath Forms

Migrating Record Center Retention Policies and InfoPath Forms requires a SharePoint token to be associated with the migration project to allow access to the Microsoft retention policy and InfoPath form APIs.

**To associate a SharePoint token with the migration project using PowerShell:**

1. Download the PowerShell module and connect to ODM PowerShell to get the project id. See [Appendix A: Working with PowerShell](#) for more details.
2. Get the project workloads (Accounts, Teams, SharePoint, Public Folders)

```
Get-OdmProjectWorkload -Project 'E1f813YBfQYAK6Q42Kun'
```

```
PS C:\Windows\System32> Get-OdmProjectWorkload -Project 'sn8u5nsB-aY5ES3qytwe'
```

WorkloadType	Id	ProjectType
Teams	s38u5nsB-aY5ES3q6NyF	M365toM365
PublicFolders	tX8u5nsB-aY5ES3q6NyZ	M365toM365
SharePoint	tH8u5nsB-aY5ES3q6NyZ	M365toM365
Accounts	sn8u5nsB-aY5ES3qytwe	M365toM365

3. Select the Id for the **SharePoint** project workload as the context

```
Select-OdmProjectWorkload -ProjectWorkloadId 'tH8u5nsB-aY5ES3q6NyZ'
```

4. Get the SharePoint connection token

```
Set-OdmSpConnectionToken -ConnectionType target
```

5. In the credentials window that opens, enter the **On Demand** credentials (typically the On Demand administrator)

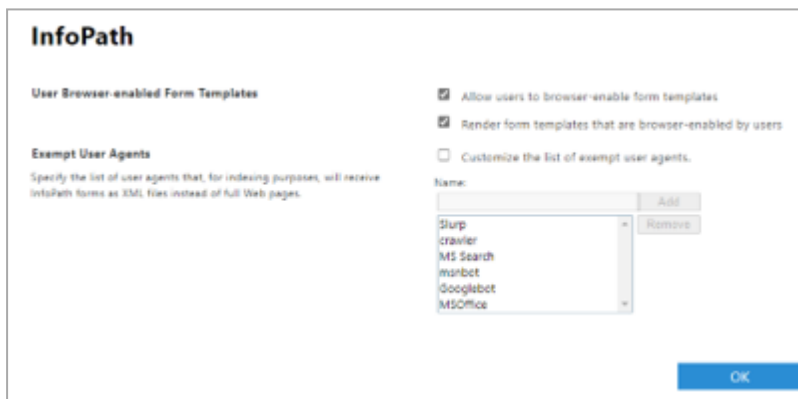
**NOTE:**

- Token is stored in the SharePoint project
- Token expires in 2-3 days. We recommend that you refresh the token after 2 days if you expect your migration to run for longer periods.

6. Start the migration task. See [Starting a SharePoint migration task](#) for details.

**To migrate tenant level settings:**

1. Log in to the SharePoint admin center of your target tenant.
2. Go to **More Features > InfoPath**.



3. Copy the information over from your source tenant.

**Starting a SharePoint migration task**

Any discovered SharePoint object where **Provision 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 a migration before a discovery task completes, otherwise migrated objects could be incorrectly processed.



## NOTES:

- If the parent of the object selected for migration does not already exist on the target then the object will not be migrated.
- Migration of a Group site will be skipped if the corresponding Group site does not already exist at the target Url.
- Migration of a site or web initiates a rediscovery of any new child webs or lists, and a full migration of all child webs and lists.
- If a file with same name but different unique ID already exists on the target, the file will be migrated from the source with the "\_duplicate" extension added to the file name if auto re-run or incremental migration is selected.

### To start a SharePoint 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 **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. From the project *Dashboard* click **Open** in the SharePoint tile.
5. Click the **SharePoint Contents** tab.
6. Select the SharePoint objects to migrate. You can select multiple objects.
7. Click **Migrate**. The *New SharePoint Migration Task* wizard starts. Each step is described below:
8. **Start**
  - a. **Task Name** - You can specify a custom name. The default name is **Migrate SharePoint Contents**.
  - b. **Use the settings from an existing migration template for this task** - select this option if you have already saved a previous migration templates. if this is the first time you are migrating mailboxes, keep this option unchecked.
    - **Select template** - select a migration template that you previously created, from the dropdown list.
  - c. **Go to Summary step** - select this option to preserve the settings and go directly to the last step of the wizard. If you do not select this option, but you have selected a template, you can step through the wizard and edit the settings in the template.
  - d. Click **Next**.

## 9. Migration Scope

The screenshot shows the 'New SharePoint Migration Task' dialog box, specifically the 'Migration Scope' step (Step 2 of 10). On the left is a vertical navigation pane with options: Start (checked), Migration Scope (active), Migration Options, Permission Options, Sensitivity Labels, List Options, Version Options, Notification, Schedule, Reporting, and Summary. The main area is titled 'SharePoint objects selected 37'. Under 'Select a migration scope', there are three radio button options: 'Migrate all' (selected), 'Migrate structure without list or library content', and 'Migrate selected objects without descendants or content'. Below these are two checkboxes: 'Include site level term group as part of site migration' (unchecked) and 'Discover new webs and lists for migration' (checked). At the bottom right are four buttons: 'Back' (disabled), 'Next' (active), 'Finish' (disabled), and 'Cancel' (disabled). The status 'Step 2 of 10' is shown at the bottom left.

a. Choose a migration scope as described below:

- **Migrate all** - select this option to migrate the selected objects including any descendants or content associated with these objects.
- **Migrate structure without list or library content** - select this option to limit the scope of the migration to the full site structure like Site, Members (users and groups), Webs and Lists. List items will not be migrated.
- **Migrate selected objects without descendants or content** - select this option to migrate only the selected objects. Any descendants or content associated with these objects will be ignored.

b. **Include site level term group as part of site migration** - select this option to add site level metadata to the target Global Term Store. The Global Term Store must be migrated before you can use this option, otherwise an error will be logged as an event. For more information, see [Migrating the Global Term Store](#).

c. **Discover new webs and lists for migration** - select this option to search for new child webs or lists on the selected sites. Deselect this option when you want to perform an incremental site migration but exclude new lists or webs. When the option is deselected, if child lists have already been pre-discovered for migration, the migration process will not search for new child webs or lists. However, if content has not been pre-discovered for the selected sites, the migration task will discover existing site content.

d. Click **Next**.

## 10. Migration Options

The screenshot shows the 'New SharePoint Migration Task' wizard, Step 3 of 10, titled 'Migration Options'. The left sidebar lists the steps: Start, Migration Scope, Migration Options (highlighted), Permission Options, Sensitivity Labels, List Options, Version Options, Notification, Schedule, Reporting, and Summary. The main content area has a heading 'Specify a default user account if the source user account cannot be matched with a target user account'. Below this is a text box labeled 'Default user account'. Further down, there are two sections with checkboxes. The first section is 'Select to clear SharePoint objects from target before migration. Clearing Teams and M365 Group sites is not supported.' with a checkbox labeled 'Clear selected objects from target'. The second section is 'Select to upgrade classic team sites to modern team site. Classic team site must not already exist on target.' with a checkbox labeled 'Upgrade classic teams site to modern team site'. At the bottom right, there are four buttons: 'Back', 'Next' (highlighted in blue), 'Finish', and 'Cancel'. The bottom left indicates 'Step 3 of 10'.

a. Configure the migration options as described below:

- **Default user account** - Specify a default target user to use as the site collection owner if the existing owner cannot be matched with a target user.
- **Clear selected objects from the target** - Select this option to delete the selected SharePoint objects that already exist on the target before being migrated. Clearing of Group site collections is not supported and will be skipped to keep the association with Microsoft 365 Groups and Teams.
- **Upgrade classic team sites to modern team sites** - Select this option to upgrade classic team sites to modern team sites. If the classic team site does not exist on the target, create the site using the modern team site.

b. Click **Next**.

## 11. Permission Options

New SharePoint Migration Task

Start ✓  
Migration Scope ✓  
Migration Options ✓  
Permission Options  
Sensitivity Labels  
List Options  
Version Options  
Notification  
Schedule  
Reporting  
Summary

☒ Migrate permissions.  
☐ Do not migrate Sharing Links permissions.  
☐ Migrate Sharing Links permissions as direct permissions. Migration is slower.

Step 4 of 10

Back Next Finish Cancel

- a. Select how permissions are migrated. Direct permissions are always migrated.



**NOTE:** To migrate permissions separately, see [Migrating Permissions](#).

- **Migrate permissions** - select this option so that unique permissions associated with sites, webs, list and list items are migrated. If you clear this option all other options in this step are deactivated and permission migration is prevented. When permissions are not migrated, the permissions for new migrations of sites, webs, lists and list items, that are not already on the target tenant, will be inherited from its parent. The permissions will not be changed for migrations of webs and lists that were already migrated to the target tenant. The permissions for previously migrated list items will be reset to inherit from its parent.
  - **Do not migrate Sharing Links permissions** - select this option to ignore Sharing Links permissions.
  - **Migrate Sharing Links permissions as direct permissions. Migration is slower** - select this option to include Sharing Links permissions. These permissions will be migrated as direct permissions. The conversion and migration of Sharing Links permissions takes more time to migrate.

- b. Click **Next**.

## 12. Sensitivity Labels

New SharePoint Migration Task

Start ✓  
Migration Scope ✓  
Migration Options ✓  
Permission Options ✓  
**Sensitivity Labels**  
List Options  
Version Options  
Notification  
Schedule  
Reporting  
Summary

☒ Process document sensitivity labels  
☐ Remove sensitivity labels from documents migrated to the target.  
☒ Match and apply corresponding labels to documents migrated to the target.

Step 5 of 11

Back Next Finish Cancel

Choose how you want to migrate sensitivity labels applied to SharePoint content. Sensitivity labels require specific tenant permissions. They must be discovered and matched before you can use the following options. For more details, see the topic [Sensitivity Labels](#).

- a. **Process document sensitivity labels** - select this checkbox to enable sensitivity label processing if you have already configured and matched sensitivity labels.

**CAUTION:** Encrypted documents may be inaccessible on the target tenant if sensitivity labels that are applied to documents in the source tenant are not processed. If a document is encrypted in the source, then it is decrypted, labels are processed and the document is reencrypted in the target.

- **Remove sensitivity labels from documents migrated to the target** - select this option to clear the labels from migrated documents. Labels on documents in the source tenant are not changed.
- **Match and apply corresponding labels to documents migrated to the target** - select this option to match and apply sensitivity labels during migration. If the label in the source document has a matching label in the target (there is a corresponding target label in the On Demand repository), the source label is replaced by the target label. If the label in the source document has no matching label in the target (there is no corresponding target label in the On Demand repository), the document is not migrated.

- b. Click **Next**.

## 13. List Options

This step applies to specific lists selected for migration from the SharePoint Contents list view.

- a. Choose from the following options to determine how changes to list items that were previously migrated should be re-migrated:
  - **Re-migrate all list items** - all list items are migrated regardless of their previous migration status.
  - **Migrate new, updated and failed list items** - a subset of list items is migrated based on the selection of criteria described below:
    - **Perform an incremental migration** - an incremental migration is performed on new, updated and failed list items based on migration history recorded in the project repository.
    - **Perform a full comparison migration** - an incremental migration is performed but takes more time because each list item from the source and target data sets are compared to determine the list items for re-migration.
- b. Choose a conflict resolution option.



**NOTE:**

- Conflict resolution rules are applied only to lists that have been previously migrated.
- Conflict resolution rules will not be applied if the **Re-migrate all list items** list option is selected in the previous section. All files in the target tenant will be overwritten if all files are migrated.
- Conflict resolution rules will not be applied to Site Pages and Site Assets system libraries.
- **Overwrite target files** - all migrated files in the target tenant will be overwritten. Migration is fastest with this option selected.



- **Skip if target list item is newer** - ignore list items in the target tenant with the same or newer last modified date. If the item does not exist in the target tenant, a copy of the source item will be migrated.
  - **Copy source file if target file is newer** - preserve all list items in the target tenant and copy the source files if the target files have a newer last modified date. When you choose this option, you must choose from one of the following file suffix options: `_Copy`, `_Source`, `_Older`, `_Backup`, and `_1`.
- c. **Migrate list and library comments** - select this option to include list and library comments in the migration task. A large number of list and library comments increase task processing time.
  - d. **Auto re-run list item migrations to retry missing items** - select this option to automatically re-run the list item migration during list migrations to retry and repair missing items.
  - e. **Migrate Enterprise Keyword column values** - select this option to migrate Enterprise Keywords. The [Global Term store](#) must be migrated. In the context of SharePoint or Microsoft 365, enterprise keywords are terms that are part of the Term Store, which is a centralized repository used to manage metadata (or tags) for content within the organization.
  - f. Click **Next**.

#### 14. : Version Options

- a. Specify the versions of the SharePoint files to migrate. These options are relevant only if the **Migrate all** option is selected in the *Migration Scope* step.



**NOTE:** When you select a conflict resolution option and a version option, you should expect the following behavior for the following options in *List Options* step:

*Overwrite target files* - the file is replaced with the file and version history from the source based on the version settings.

*Skip if target list item is the same version or newer* - the target file is not changed, but new items migrated will follow versions settings.

*Create a copy if target list item is the same version or newer* - the copy is migrated using the version settings.

Each site has its own version history of its files and each change to a file is saved with a new version. Select from the following migration options to determine how SharePoint 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 site 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 dropdown list. 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 dropdown list. 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 site version does not exceed the selected size limit, then the file and its versions will be migrated.

b. Click **Next**.

#### 15. Notification

- a. **Send notification email once the task is completed** - select this option to send a notification email when a task completes.
  - **Only in a case of failure** - Select this option to send the email if the task fails to complete successfully.
- b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
- c. Click **Next**.

#### 16. 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** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
  - **Priority** - select a priority from the dropdown for the objects scheduled for migration with this task. Values are: **Highest**, **High**, **Medium**, **Low** and **Lowest**. The default priority is **Medium**.

If the system is busy, the objects are queued (Migration state = Queued). When the system accepts new migration work, objects are taken from the queue based on the assigned priority and age in the queue.

- b. Click **Next**.

## 17. Reporting

Select the check box **Generate detailed report of migration errors** to generate a migration error report when you run the *New SharePoint Migration Task* wizard.

You can download the report from the **Reports** tab of the *SharePoint* workspace by clicking the **Download** link in the **Error Log** column. If there are no migration errors, a download link is not available. Error reports are retained for 30 days. After 30 days the download link is replaced with the label **Expired** and you can no longer download the report. For more information about error reports, see [Reports](#).

## 18. Summary

- a. **Save task settings as a template** - select this option to save the settings in this wizard as a reusable migration template.
  - **Template Name** - specify a name for the template. If you have changed the settings of a preselected template, specify the same template name to apply the changes to the template when you complete the wizard. All saved templates are displayed in the [Templates](#) tab.
- b. This step lists the following configured options for this task.
  - **Task Name** - name of the task. You can specify a custom name. The default name is **Migrate SharePoint Contents**.
  - **SharePoint objects selected** - number of SharePoint objects selected for migration.
  - **Migration Scope** - selected migration scope.
  - **Include site level term groups from Term store** - whether or not the site level term group from the Term store should be included in the migration.
  - **Default target user** - UPN of the default target user if the source user cannot be matched to a target user.
  - **Clear selected objects from target** - whether or not the target site collection are deleted if it exists is the target tenant.
  - **Upgrade classic team sites** - whether or not classic team sites are migrated to modern team sites.
  - **Migrate permissions** - whether permissions are migrated or migrated objects will inherit permissions from their parent.
  - **Migrate permissions only** - whether or not permissions are migrated for previously migrated webs and lists.
  - **Migrate Sharing Links permissions** - how Sharing Links permissions are migrated.
  - **Sensitivity labels** - indicates how sensitivity labels should be processed. Valid settings are: *Do not process labels*, *Match and apply corresponding labels to documents migrated to the target*, and *Remove sensitivity labels from documents migrated to the target*.
  - **List migration** - choice between migration of all list items or migration of incremental changes with a refresh.
  - **Conflict Resolution migration action** - how version conflicts are resolved. Indicates the suffix if a copy of migrated list items are created.

- **Auto re-run list item migrations** - whether or not list item migration should be re-run.
  - **Migrate list and library comments** - whether or not list and library comments should be migrated.
  - **Migrate Enterprise Keyword column values** - whether or not Enterprise Keywords should be migrated
  - **Migrate list item and document versions**- version option selected.
  - **Scheduled start** - expected start time of the task.
  - **Priority** - the priority of this task.
  - **Generate detailed report of migration errors** - option to collect and retain data for report generation.
- c. Click **Back** to change configurations if necessary or click **Finish** to save and start the task as scheduled.

## Migrating Permissions

Use this task to migrate permissions for previously migrated content.

### ***To start a SharePoint Permissions 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 **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. From the project *Dashboard* click **Open** in the SharePoint tile.
5. Click the **SharePoint Contents** tab.
6. Select the SharePoint objects to migrate. You can select multiple objects.
7. Click **Migrate**. The *New SharePoint Permissions Migration Task* wizard starts. Each step is described below:

## 8. Migration Scope

New SharePoint Permissions Migration Task

Migration Scope  
Permission Options  
Notification  
Schedule  
Reporting  
Summary

SharePoint objects selected 1

Select a migration scope

☒ Migrate all

☐ Migrate structure without list or library content

☐ Migrate selected objects without descendants or content

Step 1 of 6

Back Next Finish Cancel

- a. Choose a migration scope as described below:
  - **Migrate all** - select this option to migrate all permissions for the selected objects including any descendants or content associated with these objects. This includes Sites, Members (users and groups), Webs, Lists, List items and Folders
  - **Migrate structure without list or library content** - select this option to limit the scope of the permissions migration to the site structure like Site, Members (users and groups), Webs, and Lists. Permissions for list items and library content will not be migrated.
  - **Migrate selected objects without descendants or content** - select this option to migrate the permissions for the selected objects ignoring any descendants or content associated with these objects.
- b. Select **Include site level term group as part of site migration** to add site level metadata to the Global Term Store. The Global Term Store must be migrated before you can use this option, otherwise an error will be logged as an event. For more information, see [Migrating the Global Term Store](#).
- c. Click **Next**.

## 9. Permission Options

The screenshot shows a wizard window titled "New SharePoint Permissions Migration Task" with a close button (X) in the top right corner. On the left is a vertical sidebar with six steps: Migration Scope (checked with a green checkmark), Permission Options (highlighted with an orange bar), Notification, Schedule, Reporting, and Summary. The main area contains two radio button options: "Do not migrate Sharing Links permissions." (unselected) and "Migrate Sharing Links permissions as direct permissions. Migration is slower." (selected with a blue dot). At the bottom, it says "Step 2 of 6" and has four buttons: "Back" (disabled), "Next" (active), "Finish" (disabled), and "Cancel" (disabled).

- a. Select how Sharing Links permissions are migrated. Direct permissions are always migrated.
  - **Do not migrate Sharing Links permissions** - select this option to ignore Sharing Links permissions.
  - **Migrate Sharing Links permissions as direct permissions. Migration is slower** - select this option to include Sharing Links permissions. These permissions will be migrated as direct permissions. The conversion and migration of Sharing Links permissions takes more time to migrate.
- b. Click **Next**.

## 10. Notification

- a. **Send notification email once the task is completed** - select this option to send a notification email when a task completes.
  - **Only in a case of failure** - Select this option to send the email if the task fails to complete successfully.
- b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
- c. Click **Next**.

## 11. 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** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.

- **Priority** - select a priority from the dropdown for the objects scheduled for migration with this task . Values are: **Highest**, **High**, **Medium**, **Low** and **Lowest**. The default priority is **Medium**. If the system is busy, the objects are queued (Migration state = Queued). When the system accepts new migration work, objects are taken from the queue based on the assigned priority and age in the queue.
- b. Click **Next**.
12. **Reporting**
- Select the check box **Generate detailed report of migration errors** to generate a migration error report when you run the *New SharePoint Permissions Migration Task* wizard.
- You can download the report from the **Reports** tab of the *SharePoint* workspace by clicking the **Download** link in the **Error Log** column. If there are no migration errors, a download link is not available. Error reports are retained for 30 days. After 30 days the download link is replaced with the label **Expired** and you can no longer download the report. For more information about error reports, see [Reports](#).
13. **Summary**
- a. This step lists the following configured options for this task.
- **Name** - Specify a name for the task. The default name is **Migrate SharePoint Permissions Task**.
  - **SharePoint objects selected** - number of SharePoint objects selected for migration.
  - **Migration Scope** - selected migration scope.
  - **Migrate Sharing Links permissions** - how Sharing Links permissions are migrated.
  - **Scheduled start** - expected start time of the task.
  - **Generate detailed report of migration errors** - option to collect and retain data for report generation.
  - **Priority** - the priority of this task.
- b. Click **Back** to change configurations if necessary or click **Finish** to save and start the task as scheduled.

## Reviewing Migration Results

In this topic:

- [About Provision and Migration states](#)
- [Review using the SharePoint Contents list view with filters](#)
- [Review using the SharePoint Content View](#)
- [Warning and errors](#)

### About Provision and Migration states

Use the **Provision state** and **Migration state** columns in the **SharePoint Contents** list view to determine the state of any SharePoint object in the migration process.

## Provision state

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

State	Description
Discovered	SharePoint objects have been found in the source tenant.
Matched	a SharePoint object in the source tenant has been matched with a corresponding SharePoint object in the target tenant.
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 <b>Provision state</b> .
Provisioned with issues	On Demand has created (updated) the object with warnings or errors. See <a href="#">Warnings and errors</a> .

## Migration state

Use the **Migration state** property to track the progress of migrating the SharePoint object's content. Note that the Migration 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 Migration state when the provision state is <b>Discovered</b> .
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 <a href="#">Warnings and errors</a> .

## The transient nature of the Provision and Migration states during migration

When migrating a site the web and list, the task state changes to **Complete** when the web or list provision 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 **Migration state** will not change to **Migrated** until the child content is migrated. When migrating a site or web, the **Migration 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 **Migration 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.



## Reviewing results from the list view with filters

Once the migration task is complete, locate objects where **Provision state = Provisioned with issues** or **Migration state = Migrated with issues** using a flat view of the objects and filtering.

### *To see all SharePoint objects in the SharePoint contents list view*

- Remove the **Type:Site** filter.

### *To filter the list view to see all SharePoint objects with issues with provisioning*

- Set the **Provision state** filter to **Provisioned with Issues**. You can filter further by setting a filter on an object **Type**.

### *To filter the list view to see objects with issues with the migration*

- Set the **Provision state** filter to **Migrated with Issues**. You can filter further by setting a filter on an object **Type**. The smallest object type where migration issues will be found is **List**.

## Review using the SharePoint content view

1. When the migration task is complete, locate objects in the SharePoint list view by setting the following filters:
  - **Provision state = Provisioned with issues**
  - or-
  - **Migration state = Migrated with issues**
2. From the **SharePoint contents** tab
  - a. Select the object so the row is highlighted and the details pane opens to the right of the screen.
  - b. From the details pane click **Show Contents**
  - c. Continue following the webs into the site structure until you see
    - an object where the **Provision state = Provisioned with Issues**, or
    - a list where the **Migration state = Migrated with Issues**
  - d. From the details pane click **Show Parent** to return upward through the hierarchy.

## Warnings and errors

### *To see the warnings and errors for a given object*

From the **SharePoint contents** tab

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

### *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.

# 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 > Remove**. The *Remove SharePoint Objects* task wizard starts. Each step is described below:
5. **Remove Options**
  - **SharePoint objects selected for removal**- number of SharePoint objects selected for removal.
  - **Remove child objects** - select this option to include the descendant site structure for removal from the On Demand repository. If the option is cleared, descendant objects will not be removed and a reference to the deleted parent will be retained. When a discover content, collect statistics or migration task rerun, the descendant objects will be reconnected to their parents.
6. **Summary**
  - a. This step lists the following configured options for this task.
    - **Name** - Name of the task. You can specify a custom name. The default name is **Remove SharePoint Objects**.
    - **SharePoint objects selected** - number of SharePoint objects selected for removal.
    - **Include site structure** - whether or not child objects should be removed.
  - b. Click **Back** to change configurations if necessary or click **Finish** to save and start the task as scheduled.
7. Click **Delete** to confirm the action.

# Public Folders Migration

The Public Folders migration workflow consists of the following steps:

#	Step
1	Create or open a migration project
2	Configure connections
3	<a href="#">Discover Public Folders</a>
4	<a href="#">Migrate Public Folders</a>
5	<a href="#">Monitor the progress and track issues</a>

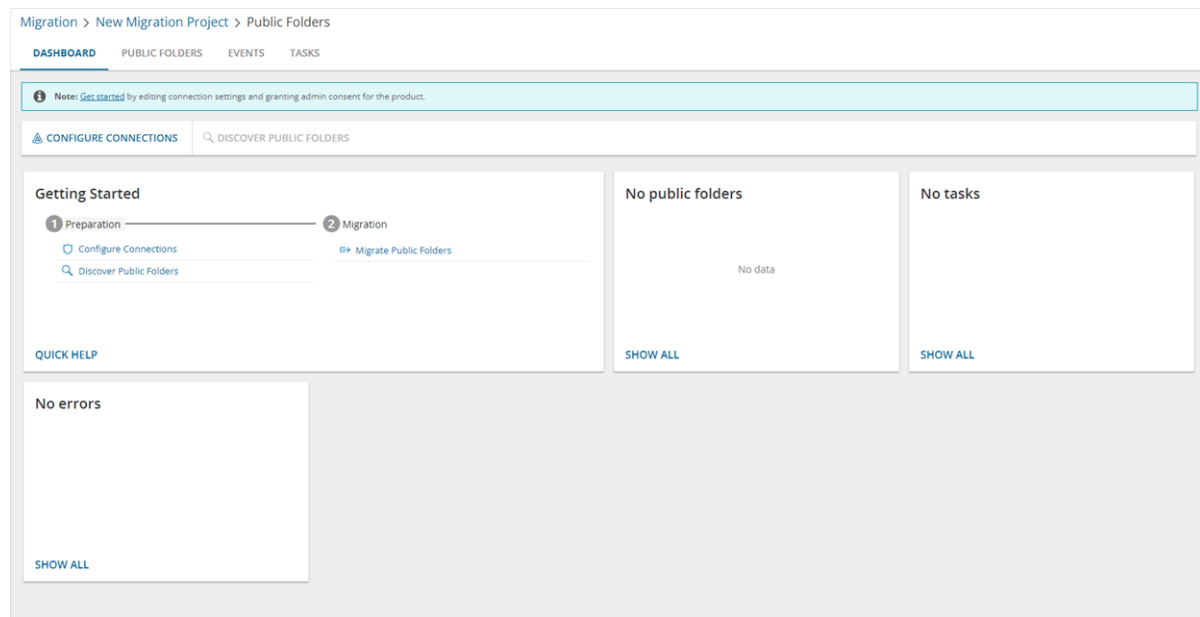
## What We Migrate

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 Workspace



## Dashboard

From this dashboard 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

Verify the following prerequisites before you start migrating Public Folders:

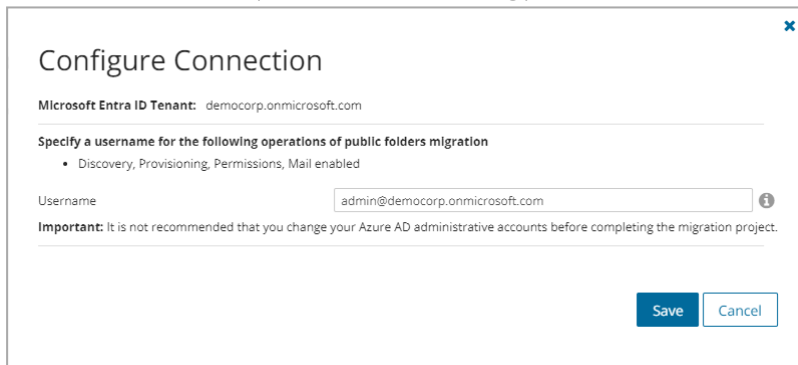
- Consents for the following permissions are granted for source and target tenants.
  - Migration - Basic
  - Mailbox Migration

If you want to verify or regrant consents for source and target tenants, see [Consents and Permissions](#).

- User principal name (Username) been provided using **Configure Connections**.
- Target temporary Migration Service account has **Owner** permission to the target public folder root.
- It is highly recommended to match or migrate all accounts in the corresponding migration project to ensure that the folder permissions and account related mail settings will be migrated.

## To configure connections:

1. Open the **Dashboard** tab from the Public Folders workspace
2. Click **Configure Connections** from the actions menu. The *Configure Connections* wizard for Public Folders open.
3. Select each tenant that you want to configure. Then click **Edit** and specify the UserprincipalName of an active user account. The account does not need any permissions, and must not be deactivated or deleted. It cannot be an external or guest account. The UserPrincipalName should not have any special characters. Allowed characters are (a to z, A to Z, 0 to 9, . \_ - @).



**Configure Connection**

Microsoft Entra ID Tenant: democorp.onmicrosoft.com

Specify a username for the following operations of public folders migration

- Discovery, Provisioning, Permissions, Mail enabled

Username:

**Important:** It is not recommended that you change your Azure AD administrative accounts before completing the migration project.

**Save** **Cancel**

# Discovering Public Folders

Before proceeding with the migration, retrieve the list of public folders from the source tenant. Explicit credentials must be provided using **Configure Connections**. For more information, see [Prerequisites](#).

- [Discovering all Public Folders](#)
- [Discovering Public Folders from a file](#)
- [Reviewing the Discover public folders task](#)
- [Reviewing the Discover public folders task events](#)



**TIP:** If you want to rediscover public folders, rerun the existing discovery task.

## Discovering all Public Folders

### To create 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 **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click **Public Folders** from the project tiles, or click **Open** from the Public Folders tile to open the *Public Folders Migration Workspace*.
5. Go to the **Public Folders** tab. Then click **Discovery > Discover Public Folders**. The *New Public Folder Discovery Task* wizard starts. Each step is described below:
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** - task runs immediately.
    - **Run later** - task must be started manually.
    - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
  - b. Click **Next**.
7. **Summary**
  - a. Verify the task specifications as described below:
    - i. **Name** - name of the task. You can specify a custom name. The default name is **Public Folder Discovery Task**.
    - 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.

When the discovery task is complete, you will see the source tenant's public folder summary on the **Dashboard**.

## Discovering Public Folders from a file

When you have a large set of public folders but you want to migrate a subset of those public folders, you can start the discovery process by using a CSV file. The CSV file lets you specify the public folders that you want to discover and ignore the rest. This is a two-step process:

### Step 1: Prepare the CSV file

1. Create a CSV file with the column title **Source Path**. Then enter the relative path of the folders that you want to search. Some examples are shown below:



#### NOTE:

- You can download a CSV template when you start the *New Public Folder Discover from File Task* wizard and click **Download Example File** from the **Discovery Options** step.
- CSV file names with non-ASCII characters are not supported.

	A
1	Source Path
2	\ParentFolder
3	\ParentFolder\SubFolder
4	\ParentFolder\SubFolder\ChildFolder

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

### Step 2: Start the Discovery Task

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **Public Folders** tile, or click **Open** from the *Public Folders* tile to open the *Public Folders Migration Workspace*.
5. Go to the *Public Folders* tab. Then click **Discovery > Discover Public Folders from File**. The *New Public Folder Discover from File Task* wizard starts. Each step is described below:

### 6. Discovery Options

- a. Click **Browse** and select the CSV that contains the folder paths that you want to search.
- b. Click **Next**.

### 7. 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** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- b. Click **Next**.
8. **Summary**
- a. Verify the task specifications as described below:
- i. **Name** - name of the task. You can specify a custom name. The default name is **Public Folder Discover from File Task**.
  - 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.

## Reviewing the Discovery Task

1. Open the **Tasks** tab.
2. Select the task that you want to review. The default name is `Public Folder Discovery Task` or `Public Folder Discover from File 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 `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.

## Reviewing the Discovery Task Events

1. Open 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

# Managing Public Folders with Collections

Migrating large numbers of folders requires careful planning. The folders could belong to different offices and geographical locations or sensitive departments. Migrating Public Folders of Finance or Legal departments require special care. Organize the Public Folders into collections to make large Public Folder lists more manageable.

In this topic:

- [Adding Public Folders to Collections](#)
- [Working with the Collections Dashboard](#)

## Adding Public Folders to Collections

You can add Public Folders to collections in several ways:

- [Select the Public Folders and add to a new collection](#)
- [Select the Public Folders and add to an existing collection](#)
- [Use a CSV file to add Public Folders to one or more collections](#)

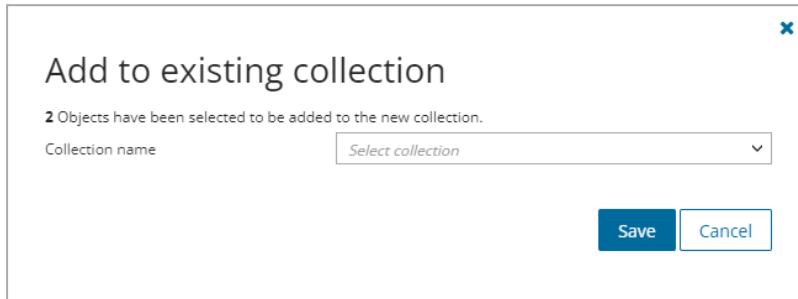
### **To add selected Public Folders to a new collection:**

1. From the project dashboard, click **Open** in the *Public Folders* tile to open the *Public Folders* migration workspace.
2. Click the **Public Folders** tab.
3. Select the Public Folders you want to add to the collection.
4. From the actions toolbar, click **Collections > New Collection**. The *New Collection* dialog opens.

5. Enter a collection name in the **Collection name** field and click **Save** to add the selected Public Folders to the collection.

### **To add selected Public Folders to an existing collection:**

1. From the project dashboard, click **Open** in the *Public Folders* tile to open the *Public Folders* migration workspace.
2. Click the **Public Folders** tab.
3. Select the Public Folders you want to add to an existing collection.
4. From the actions toolbar, click **Collections > Add To Collection**. The *Add to existing collection* dialog opens.



5. Select a collection from the **Collection name** dropdown and click **Save** to add the selected Public Folders to the collection.

#### **To add Public Folders from a CSV file to a new or existing collection:**

Using a CSV file provides the following additional benefits:

- Multiple collections can be created with the same CSV file.
- Existing collections can be specified in the CSV file to add additional Public Folders.
- Public Folders can be listed in multiple collections.

This is a two-step process as described below to add Public Folders to one or more collections:

##### **Step 1: Prepare the CSV file**

1. From the actions toolbar, click **Collections > Import Collections**. The *Import Collections from File* wizard starts.
2. From the **Mapping File** step, click **Download Example File**. A ZIP file is downloaded.
3. Extract the CSV file and use it to prepare your import file in one of three formats described below:

**i** **NOTE:** CSV file names with non-ASCII characters are not supported. Public Folders in the CSV that have not been discovered cannot be added to a collection.

Use the format shown below to prepare the CSV file. The minimal set of columns required are shown.

**i** **TIP:** You can export the selected Public Folders to a CSV file and then add the **Collection** column and retain the **Source MailNickname** column. All other columns in the exported CSV file will be ignored so you can remove those columns if you want.

- **SourcePath** - relative path of the Public Folder.
- **Collection** - Column header for the collection name. If a collection in the CSV does not exist, a new collection will be created with the name specified in the CSV.

##### **Step 2: Import the CSV file**

1. Open the **Public Folders** tab.
2. From the actions toolbar, click **Collections > Import Collections**. The *New Import Collections from File Task* wizard starts.
3. **Mapping File**
  - a. Click **Browse** and select the CSV file. The selected CSV file name appears.
4. **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** - task runs immediately.
    - **Run later** - task must be started manually.
    - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
  - b. Click **Next**.
5. **Summary**
  - a. Verify the task specifications as described below:
    - i. **Name** - name of the task. The default name is **Import Collections From File**. You can specify a custom name.
    - ii. **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.
  - c. Click **Finish**.

**To verify the addition of the Public Folder to a collection:**

1. Check the **Collections** column in the Public Folders List View that indicates the most recent collection where the Public Folder has been added and the number of additional collections that also contain the Public Folder.
2. Select a Public Folder from the Public Folders List View to open the Public Folder Detail pane. Check the **Collections** property that lists all the collections where the Public Folder has been added.

## Working with the Collections Dashboard

The Collection Dashboard shows the collection-specific summary, allows you to see Public Folders added to it, create tasks for them, and monitor the progress of tasks.

**To view the collection dashboard for an existing collection:**

1. From the project dashboard, click **Open** in the *Public Folders* tile to open the *Public Folders* workspace.
2. From the top-right corner of the workspace, click **Select Collection** and then select the collection to view. The collection *Dashboard* is displayed.
3. Open the **Public Folders** tab. You will see the list of Public Folders that belong to the collection.

**To remove items from a collection:**

- a. From the actions toolbar, click **Collections > Remove from Collection**.
- b. In the confirmation dialog click **Remove** to remove the selected Public Folders from the collection.

***To rename the collection:***

- a. Click **Collections > Rename Collection** in the Actions toolbar of the collections dashboard.

***To delete the collection:***

- a. Click **Collections > Delete Collection** in the Actions toolbar of the collections dashboard.

***To see the tasks for collection-specific Public Folders:***

- a. Open the **Tasks** tab.

***To see the events related to the collection:***

- a. Open the **Events** tab.

***To return to the Public Folders migration workspace:***

- a. Click the collection dropdown at the top-right corner of the page, and select **Show All**.

## 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.

## Provisioning Public Folders

The provisioning task helps you with the following premigration preparations:

- Provision public folders in the target tenant.
- Resolve naming conflicts.

## Starting the provisioning task

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click **Public Folders** from the project tiles, or click **Open** from the Public Folder tile to open the *Public Folder Migration Workspace*.
5. Select one or more public folders from the *Public Folders List View*.
6. Click **Provision > Provision Public Folders**. The *New Public Folder Provision Task* wizard starts. Each step is described below:
7. **Options**
  - a. **Include subfolders in provision scope** - select this option to include all sub-folders during migration of selected public folders.
  - b. **Migrate mailbox permissions** - select this option to migrate permissions of selected public folders (and sub-folders if included).
  - c. **Migrate mail enabled** - select this option to migrate the *mail-enabled* property of selected public folders (and sub-folders if included). If this option is not selected, the *mail-enabled* property of selected public folders or sub-folders will not be migrated.
  - d. **Re-use target public folder** - select this option if a folder with the same name already exists in the target tenant. When this option not checked and the same folder already exists in the target, the service returns the error "Folder already exists", and the public folder with all its sub-folders is not provisioned.
8. **Notification**
  - a. **Send notification email once the task is completed** - select this option to send a notification email when a provisioning task completes.
    - **Only in a case of failure** - Select this option to send the email if the provisioning task fails to complete successfully.
  - b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
  - c. Click **Next**.
9. **Step 4. 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** - task runs immediately.
    - **Run later** - task must be started manually.
    - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
  - b. **Priority** - select a priority from the dropdown for the objects scheduled for migration with this task . Values are: **Highest**, **High**, **Medium**, **Low** and **Lowest**. The default priority is **Medium**. If the system is busy, the objects are queued (Migration state = Queued). When the system accepts new migration work, objects are taken from the queue based on the assigned priority and age in the queue.
  - c. Click **Next**.

## 10. Summary

- a. Verify the task specifications as described below:
    - i. **Name** - name of the task. You can specify a custom name. The default name is **Public Folder Provision Task**.
    - ii. **Source tenant** - name of the tenant in this project.
    - iii. **Target tenant** - name of the target tenant in this project.
    - iv. **Include subfolders in provision scope** - indicates whether or not subfolders are included.
    - v. **Migrate mailbox permissions** - indicates whether or not mailbox permissions are provisioned.
    - vi. **Migrate mail enabled** - indicates whether or not the *mail-enabled* property of the selected public folders (and sub-folders if included) are migrated.
    - vii. **Re-use target public folder** - indicates whether a target folder with the same must be reused.
    - viii. **Scheduled start** - date and time when the task will start. **Now** indicates that the task will start immediately.
    - ix. **Priority** - the priority of this task.
  - b. Click **Back** to revise or review a previous step or click **Finish** to complete the task wizard and start the task as scheduled.
11. The provisioning task is created. You can track its progress from the **Tasks** tab, view the summary on the Dashboard or monitor alerts and notifications from the **Events** tab.

# Mapping Public Folders

Use this method to map specific public folders from the source to existing public folders in the target tenant that do not have any matching attributes. The CSV file lets you specify the public folders that you want to map and ignore the rest. You can then use this file in the New Mapping from File Task wizard to map the public folders from the source to the target tenant. This is a two-step process:

## Prepare the CSV file

1. Create a new CSV file and specify the column header in the first row and then enter the relative path in the subsequent rows manually. Since paths in a mapping file are case sensitive, this method must be used with caution.

### NOTE:

- You need to map only the public folder paths that will change in the target Tenant.
  - You can download a CSV template when you start the *New Public Folder Mapping from File Task* wizard and click **Download Example File** from the **Mapping File** step.
  - CSV file names with non-ASCII characters are not supported.
- a. In the first column, specify the header as either **Source Path**.
  - b. In the second column, specify the header as either **Target Path**.

- c. Enter the source and target paths manually in the subsequent rows . Ensure that only relative paths are used.
2. Save the CSV file. You may rename the file if needed.

### Start the Mapping from File 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 **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the *Public Folders* tile, or click **Open** from the *Public Folders* tile to open the *Public Folders* Migration Workspace.
5. Go to the *Public Folders* tab. Then click **Provision > Map from File**. The *New Public Folder Mapping from File Task* wizard starts. Each step is described below:

**New Public Folder Mapping from File Task**

Mapping File | Schedule | Summary

Select a comma-separated values (CSV) file with custom mapping of source and target public folders.  
[Example CSV File](#) [Download Example File](#)

Source Path	Target Path
parentFolder\otherParentFolder	
parentFolder\subfolder, \otherParentFolder\otherSubfolder	
parentFolder\subfolder\childfolder, \otherParentFolder\otherSubfolder\otherChildfolder	

[Browse...](#)

Step 1 of 3

[Back](#) [Next](#) [Finish](#) [Cancel](#)

### 6. 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**.

### 7. 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** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- b. Click **Next**.

## 8. Summary

- a. Verify the task specifications as described below:
  - **Name** - name of the task. The default name is **Public Folder Mapping from File Task**. You can specify a custom name.
  - **Source tenant** - name of the tenant where the source URLs exist.
  - **Target tenant** - name of the tenant where the target URLs may or may not exist.
  - **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 the progress in the *Tasks* tab, monitor alerts and notifications in the *Events* tab and view the summary on the *Dashboard*.

When the task completes, the *Public Folders* list is updated. Compare the *Source Path* column with the *Target Path* column for the selected public folders. The Status is set to **Mapped**.

# Collecting Statistics

A **Public Folder Collect Statistics Task** conducts an assessment of all public folders in the source tenant and matching public folders in the target tenant.


Each **Public Folder Collect Statistics Task** generates events. Events are milestones that a task achieves as it runs. For example, when an **Public Folder Collect Statistics Task** starts, an event is logged and it appears in the events list.

In this topic:

- [Create and run a Public Folder Collect Statistics Task](#)
- [Review the Public Folder Collect Statistics Task](#)
- [Review the statistics collected](#)
- [Review the events for the Collect Public Folder Statistics Task](#)

## Create a Public Folder 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 **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **Public Folder** tile, or click **Open** from the Public Folders tile to open the *Public Folders* migration workspace.
5. Select the **Public Folders** tab and then select one or more Public Folders in the list to activate the menu options.

 **NOTE:** Before you proceed, verify that the source tenant public folders have been rediscovered. For more information see [Discovering Public Folders](#)

6. From the *Actions* menu, click **Collect Statistics**. The *New Public Folder Collect Statistics Task* wizard starts. Each step is described below:



## 7. Description

- a. Describes the purpose of this task: to retrieve the Size and Item Count statistics from the source tenant.
- b. Click **Next**.

## 8. Notification

- a. **Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
  - **Only in a case of failure** - Select this option to send the email if the discovery task fails to complete successfully.
- b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
- c. Click **Next**.

## 9. 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** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- b. Click **Next**.

## 10. Summary

- a. Verify the task specifications as described below:
  - i. **Name** - name of the task. You can specify a custom name. The default name is **Public Folder Collect Statistics Task**.
  - 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.

## Review the Public Folder Collect Statistics Task

1. Open the **Tasks** tab.
2. Select the Collect Public Folder 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 `Public Folder Collect Statistics`.
  - b. **Created** - date and time when the task was created.
  - c. **Modified** - date and time when the task was last updated.
  - d. **Status** - status of the task.
  - e. **Last Operation** - 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. **Collected (number)** - number of public folders processed and their state.
- h. **Events (number)** - number of events that the task encountered.

## Review the statistics collected

1. Open the **Public Folders** tab.
2. View the **Item Count** and **Size** columns.


## Review the Collect Public Folder Statistics Task Events

1. Open the **Tasks** tab.
2. Select a task named **Public Folder 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** - name of the public folder object if applicable.
  - b. **Task** - name of the task.
  - c. **Time** - date and time when the event occurred.
  - d. **Category** - type of task. the value is **Public Folder Collect Statistics**.

# Migrating Public Folders

Make sure that all associated accounts in this project are matched or migrated:

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the *Public Folders* tile, or click **Open** from the *Public Folders* tile to open the *Public Folders* Migration Workspace.
5. Go to the *Public Folders* tab and select the public folders that you want to migrate.

 **TIP:** Use [search](#) and [filtering](#) to quickly navigate through the list of public folders.

6. Click **Migrate**. The *New Public Folder Migration Task* wizard starts. Each step is described below:
7. **Start**
  - a. **Task name** - You can specify a custom name. The default name is **Public Folder Migration Task**.
  - b. **Use the settings from an existing migration template for this task** - select this option if you have already saved a previous migration templates. if this is the first time you are migrating mailboxes, keep this option unchecked.
    - **Select template** - select a template that you previously created, from the dropdown list.

- c. **Go to Summary step** - select this option to preserve the settings and go directly to the last step of the wizard. If you do not select this option, but you have selected a template, you can step through the wizard and edit the settings in the template.
- d. Click **Next**.

## 8. Options

- **Include subfolders in migration scope** - select this option to include all sub-folders during migration of selected public folders.
- **Migrate public folder content** - select this option to migrate folder and sub-folder contents. You can clear this option for a test migration to create an empty public folder structure and transfer folder permissions.
- **Migrate public folder permissions** - select this option to migrate permissions of selected public folders (and sub-folders if included).

## 9. Notification

- a. **Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
  - **Only in a case of failure** - Select this option to send the email if the discovery task fails to complete successfully.
- b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
- c. Click **Next**.

## 10. 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** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- b. **Priority** - select a priority from the dropdown for the objects scheduled for migration with this task . Values are: **Highest**, **High**, **Medium**, **Low** and **Lowest**. The default priority is **Medium**. If the system is busy, the objects are queued (Migration state = Queued). When the system accepts new migration work, objects are taken from the queue based on the assigned priority and age in the queue.
- c. Click **Next**.

## 11. Summary

- a. **Save task settings as a migration template** - select this option to save the settings in this wizard as a reusable migration template.
  - **Migration Template Name** - specify a name for the template. If you have changed the settings of a preselected template, specify the same template name to apply the changes to the template when you complete the wizard. All saved templates are displayed in the [Templates](#) tab.
- b. Verify the task specifications as described below:
  - **Name** - name of the task. The default name is **Public Folder Migration Task**. You can specify a custom name.

- **Source tenant** - name of the tenant where the source URLs exist.
  - **Target tenant** - name of the tenant where the target URLs may or may not exist.
  - **Include subfolders in migration scope** - indicates whether or not subfolders are included in the migration scope.
  - **Migrate public folder content** - indicates whether or not the folder contents are migrated.
  - **Migrate public folder permissions** - indicates whether or not the folder permissions are migrated.
  - **Scheduled start** - date and time when the task will start. **Now** indicates that the task will start immediately.
  - **Priority** - the priority of this task.
- c. 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**.

# Power BI Migration

Power BI is a business analytics tool developed by Microsoft for creating interactive reports and dashboards. While Power BI is not automatically included in Office 365, Microsoft seamlessly integrates Power BI with Excel and other Office 365 applications through various subscription plans that provide advanced features and capabilities.

On Demand Migration helps you migrate your Power BI assets from a source to a target tenant, with easy-to-use discovery, assessment and migration services.

In this chapter:

- [What We Migrate](#)
- [Prerequisites and Limitations](#)
- [Power BI Migration Workspace](#)
- Preparation
  - [Connecting to Power BI](#)
  - [Configuring the project](#)
  - [Discovering Content](#)
  - [Managing objects with Collections](#)
  - [Assigning Connection Profiles](#)
  - [Refreshing Permissions](#)
- Migration
  - [Mapping Workspaces](#)
  - [Matching Gateways](#)
  - [Migrating Connections](#)
  - [Migrating Workspaces](#)

## What We Migrate

The On Demand Migration Power BI migration service migrates Power BI assets like shared workspaces between Microsoft 365 tenants, based on the source data connection types to which Power BI reports are connected.

On Demand Migration migration support for Power BI components is indicated in the following table. Migrations are limited to 1 GB for supported Power BI components.

Power BI Component	Support	Notes
Microsoft public preview features	×	
On Premises Power BI	×	
<b>Power BI Service Object</b>		
Admin Group Workspaces	×	
Dashboards	×	

Power BI Component	Support	Notes	
On Premises Gateways	✗	Requires manual creation in destination Tenant	
Personal Workspaces	✗		
Pipelines	✗		
Power BI Account Licensing	✗		
Power BI Applications	✗		
Reports	✓	Subject to Source Data Connection Type.	
Scorecard	✗		
Semantic Models	✓	Subject to Source Data Connection Type	
Shared Workspaces	✓	Subject to Source Data Connection Type	
Power BI Service Object Permissions			
Gateway Access Permissions	✗	Requires manual creation in target Tenant	
Report Permissions	✓	Requires account matching	
Semantic Model Permissions	✓	Requires account matching	
Workspace Permissions	✓	Requires account matching	
Source Data Connection Types for On Premise Gateways. Connections not listed are considered as unsupported			
Connection Type		Authentication	Data Source
File	✓	Windows	Microsoft Excel
SQL Server	✓	Basic, Windows	Microsoft Azure SQL Server, Microsoft SQL Server
Web	✓	Anonymous, Basic, Windows	URL
ODBC	✓	Basic, Windows	Connection String for dBase files or Excel file
Oracle	✓	Basic, Windows	Oracle database
M365 security and compliance features			
Legal Hold	✗		
M365 Compliance Customer Lockbox	✗		
Microsoft Information Protection policies and labels	✗		
Retention Labels	✗		

Power BI Component	Support	Notes
<b>Power Platform features</b>		
Power Apps	×	
Power Automate (Flow)	×	
Power Pages	×	
Power Virtual Agents	×	

# Prerequisites and Limitations

## Prerequisites

- It is highly recommended that all accounts in the project be matched to ensure that membership and content ownership are processed correctly. See [Matching and Mapping Accounts](#) for more information.
- The target tenant should already have the fully configured Power BI Service with licensing to match the source tenant.
- The following admin consents should be granted for Power BI migration:
  - Migration - Basic
  - Migration – Power BI
- Additional permissions are necessary for both source and tenant Power BI service principals through the Power BI service portal at <https://app.powerbi.com>. See the [Consents and Permissions](#) topic for more details.

## Limitations

The limitations indicated below may not be an exhaustive list of limitations as some may appear in unique customer migration scenarios, or arise due to platform or legacy support restrictions.

- Limited to shared workspaces, personal and admin group workspaces will not be migrated.
- Connection migrations require credentials for source system access during migration.
- Connections utilizing OAuth2 authentication types are not supported for migration.
- Dataflows are not supported.
- On Premises Gateways are not migrated.
- Explicit access to shared workspaces is required for migration.
- Explicit access to on premises Gateways is required for discovery and mapping.
- Row-level permissions of data tables in the source tenant are ignored during migration because these permissions are inherited from the top-level semantic model in the target tenant.
- User account licensing for Power BI is not processed.
- Sensitivity labels are not transferred.

- Third party reporting visualization plugins are not transferred.
- Power BI objects specific to Multi-Geo tenants cannot be migrated.

## Microsoft Power BI Limitations

Power BI migrations are subject to Microsoft limitations for the use of the Power BI migration service and the included APIs. These limitations are published by Microsoft on their public website.

- Power BI discoveries and migrations are subject to Microsoft Power BI REST API throttling during processing.
- Small semantic model storage format are supported but large semantic model storage formats are not. See Microsoft article [Limitations when downloading a report .pbix file](#).

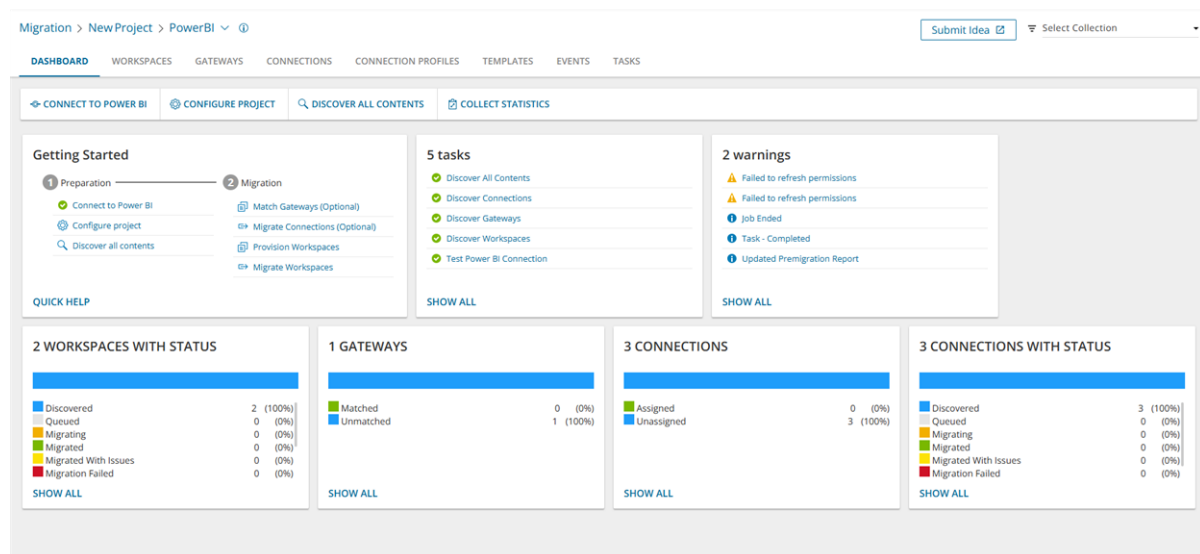
# Power BI Migration Workspace

**NOTE:** The Power BI migration workspace is a On Demand Migration project workspace, and should not be confused with Power BI Workspaces that are objects of the Power BI asset type.

In this topic:

- [Dashboard](#)
- [Workspaces List View](#)
- [Gateways List View](#)
- [Connections List View](#)
- [Connection Profiles List View](#)

## Dashboard



The dashboard in the Power BI migration workspace presents a summary of the Power BI migration activities and links to important actions. The components of the dashboard are as described below:



**Notification panel** - presents relevant information and shortcuts to migration activities. Appears when a notification is available.

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

- **Connect to Power BI** - starts the *New Test Power BI Connection Task* wizard that verifies the security requirements to connect to the Power BI application in the source and target tenants. See [Connecting to Power BI](#) for more information.
- **Configure Project** - starts the *Edit Project* wizard for configuring migration defaults like the administrator for Power BI objects migrated to the target tenant, Security Group names and settings for collision handling. For more information see [Configuring the Project](#).
  - a. Click **Configure Project**. The *Edit Project* page opens
  - b. In the **Default Target Admin User** field, enter the user principal name (UPN) of the target tenant administrator.
- **Discover All Contents** - Starts the *New Discover All Contents Task* wizard to discover all Workspaces, Gateways and Connections in the source tenant. For more information see [Discovering Content](#).
- **Collect Statistics** - Starts the *New Collect Statistics Task* wizard to collect information needed for detailed premigration report which includes Power BI Reports, Users and Object Roles in addition to Power BI content.

### Dashboard Tiles

- **Getting Started** - displays quick start links and instructions about various actions for preparing and migrating Power BI Connections and Workspaces.
- **Workspaces with Status** - displays a summary of the Power BI Workspaces in various migration states. The title displays the total number of workspaces with status. Click **Show All** to open the *Workspaces List view* to inspect the Workspaces.
- **Gateways** - displays a summary of the Power BI Gateways in various migration states. The title displays the total number of Gateways. Click **Show All** to open the *Gateways List view* to inspect the Gateways.
- **Connections** - displays a summary of the Power BI Connections with pre-migration connection profiles: *Assigned* or *Unassigned*. A connection profile is a named set of credentials that is assigned to discovered Connections before they can be migrated. The title displays the total number of connections. Click **Show All** to open the *Connections List view* to inspect the Connections.
- **Connections with Status** - displays a summary of the Power BI Connections in various migration states. The title displays the total number of connection. Click **Show All** to open the *Connections List view* to inspect the Connections.
- **Tasks** - displays the five most recent tasks that were completed in the Power BI migration 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 Power BI migration workspace. The title displays the total number of error events. Click **Show All** to open the *Events List view*.

## Workspaces List View

	Workspace State	Name	Owner	Target Workspace	Reports count	Users count	Capacity
<input type="checkbox"/>	Discovered	Corporate	MOD Administrator	-	1	2	Power BI Standard
<input type="checkbox"/>	Discovered	Mark&ProjectTeam		-	2	2	Power BI Standard
<input checked="" type="checkbox"/>	Discovered	SalesAndMarketing		-	2	2	Power BI Standard

The Workspaces List View is comprised of the following components:

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

**Filter panel** - consists of predefined filters for the Workspaces List view. See [Filtering](#) for more information about working with filters. The predefined filters are:

- **Status** - returns a list of Workspaces based on the selected status of the most recent task that was run for the Workspace. Valid values are *New*, *Stopped*, *In Progress*, *Failed*, *Completed* and *Completed with Issues*.
- **Workspace State** - returns a list of Workspaces in the selected migration state. See the **Migration State** column description below for filter values.

**List View Actions Menu** - contains links to Workspace actions and the search box. Each action is explained in greater detail in subsequent topics. See [Searching](#) for more information about working with the search box.

- **Discover** - starts the *New Discover Workspaces Task* wizard to discover Connections in the source tenant. See [Discovering Workspaces](#) for more information.
- **Migrate** - starts the *New Migrate Workspaces Task* wizard. See [Migrating Workspaces](#) for more information.
- **Delete** - deletes one or more selected Workspaces.
- **New Collection, Add to Collection, More > Import Collection** - see [Managing Power BI objects with Collections](#) for more information.
- **More** - additional actions as described below:
  - **Add to Collection** - Adds one or more selected Power BI objects to a new collection. See [Adding Power BI objects to Collections](#) for more information.
  - **Map from File** - starts the *New Mapping from File Task* wizard to map specific Workspaces from the source to a Workspace that may or may not exist in the target tenant. See [Mapping Workspaces](#) for more information.
  - **Reset Workspace** - Resets the source workspace to the discovered state when you delete a workspace in the target environment to recreate, rename, or simply start over again. See [Resetting Workspaces](#) for more information.

- **Import Collections** - Add Power BI objects from a CSV file to a new or existing collection. See [Adding Power BI objects to Collections](#) for more information.
- **Refresh Permissions** - ensures that service principal permissions for Workspaces and Connections in the source tenant are refreshed and fully updated. See [Refreshing Permissions](#) for more information.

**List View** - displays information about Workspaces in the source tenant. Use **Edit Columns** to show or hide columns in the list. The columns are as described below:

- **Workspace State** - state of the task in the migration process. Values are as listed below:
  - **Discovered** - Workspace discovered in the source tenant.
  - **Exists in Target** - Source Workspace also exists in the target tenant. See [Discovering Target Workspaces](#) for more details.
  - **Queued** - waiting for service resources to be available. For more information, see [How Queuing Works](#).
  - **Migrating** - Workspace migration in progress.
  - **Migrated** - Workspace migrated successfully to the target tenant.
  - **Migrated with Issues** - Workspace migration completed but there were issues during migration.
  - **Migration Failed** - Workspace could not be migrated.
  - **Provisioned** - Workspace provisioned successfully to the target tenant.
  - **Provisioned with Issues** - Workspace provisioning completed but there were issues during migration.
  - **Provision Failed** - Workspace could not be provisioned.
  - **Stopped** - Workspace migration has been halted.
- **Name** - name of the Workspace in the source tenant.
- **Owner** - the username of the owners of the source tenant workspace.
- **Target Workspace** - displays the target workspace name when you map a source workspace to a target workspace with a different name.
- **Reports Count** - number of reports in the source tenant Workspace.
- **Users Count** - total number of users who have access to the source tenant Workspace.
- **Capacity** - capacity level of the Power BI. valid values are **Power BI Standard** and **Power BI Premium**. Help you plan that the capacity in the target tenant.
- **Priority** - indicates the precedence level of this object if it is included in a migration task where the priority is set in the *Schedule* step of the migration wizard. Values are: *Highest*, *High*, *Medium*, *Low* and *Lowest*. The default priority is *Medium*. If the system is busy, the objects are queued. When the system accepts new migration work, objects are taken from the queue based on the assigned priority and age in the queue.
- **Migration access** - green icon indicates the workspaces the workspaces are secured by a Microsoft Entra security group, and the access level is set to Administrator. Red icon indicates that there are access issues that may prevent migration.
- **Rebind supported** - Indicates *True* if the migration of the workspace reports occurs without using the [Skip rebind](#) option. Indicates *False* if all or some of the workspace reports cannot be migrated without choosing a Skip rebind option.

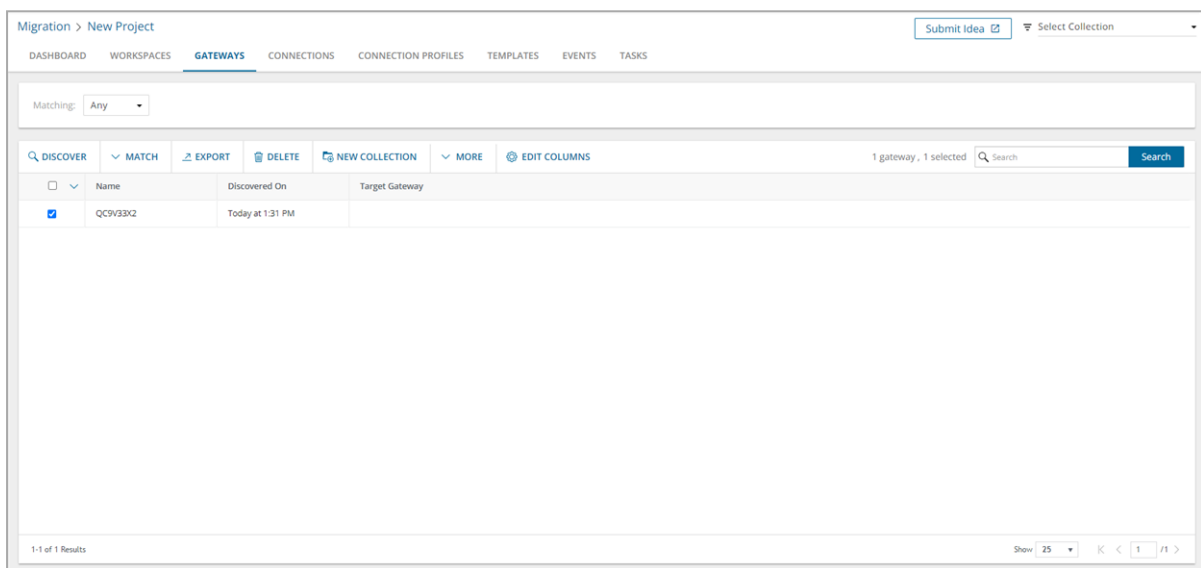
- **Collections** - indicates the most recent collection where the corresponding Workspace is added and the number of additional collections that also contain this object.

## Workspace Details

When you select a Power BI Workspace from the List View, the Workspace Detail pane opens. The information in the pane is described below:

- **Description** - name of the Workspace in the source tenant.
- **Events** - count of the events that occurred during one or more tasks.
- **Tasks** - list of tasks invoked for the selected Workspace .
- **Collections** - list of collections that contain the selected Workspace.

## Gateways List View



The Gateways List View is comprised of the following components:

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

**Filter panel** - consists of predefined filters for the Gateways List view. See [Filtering](#) for more information about working with filters. The predefined filter is:

- **Matching** - returns a list of Gateways in the selected matching state. Valid values are *Matched* and *Unmatched*.

**List View Actions Menu** - contains links to gateway actions and the search box. Each action is explained in greater detail in subsequent topics. See [Searching](#) for more information about working with the search box.

- **Discover** - starts the *New Discover Gateways Task* wizard to discover Connections in the source tenant. See [Discovering Gateways](#) for more information.
- **Match** - starts the *New Match Gateways Task* wizard. See [Matching and Mapping Gateways](#) for more information.
- **Export** - exports one or more selected Gateways to a CSV file.
- **Delete** - deletes one or more selected Workspaces.

- **New Collection, Add to Collection, More > Import Collection** - see [Managing Power BI objects with Collections](#) for more information.

**List View** - displays information about Gateways in the source tenant. Use **Edit Columns** to show or hide columns in the list. The columns are as described below:

- **Name** - name of the source tenant gateway.
- **Discovered On** - date and time the source tenant gateway was discovered by a discovery task.
- **Target Gateway** - name of the target tenant gateway.
- **Collections** - indicates the most recent collection where the corresponding Gateway is added and the number of additional collections that also contain this object.

## Gateway Details

When you select a Power BI Gateway from the List View, the Gateway Detail pane opens. The information in the pane is described below:

- **Description** - name of the Gateway in the source tenant.
- **Events** - count of the events that occurred during one or more tasks.
- **Tasks** - list of tasks invoked for the selected Gateway.
- **Collections** - list of collections that contain the selected Gateway.

## Connections List View

Connection State	Name	Type	Users	Gateway Name	Discovered On	Assigned Connection Profile	Target Binding
Discovered	Finance Data	File	MOD Administrator, ODMPI	QC9033K2	Today at 11:02 PM		Supported
Discovered	Finance	File	MOD Administrator, ODMPI	QC9033K2	Today at 11:02 PM		Supported

The Connections List View is comprised of the following components:

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

**Filter panel** - consists of predefined filters for the Connections List view. See [Filtering](#) for more information about working with filters. The predefined filters are:

- **Status** - returns a list of Connections based on the selected status of the most recent task that was run for this account. Valid values are *New*, *Stopped*, *In Progress*, *Failed*, *Completed* and *Completed with Issues*.

- **Connection State** - returns a list of Connections in the selected migration state. See the **Connection State** column description below for filter values.
- **Type** - see the **Type** column description below for filter values.
- **Profile** - returns a list of Connections that either assigned or not assigned to a connection profile. Valid values are *Assigned* and *Not Assigned*.
- **Target Binding** - valid values are *Supported* and *Unsupported*.
- **Gateway Name** - returns a list of Connections for the selected Gateway.

**List View Actions Menu** - contains links to Connection actions and the search box. Each action is explained in greater detail in subsequent topics. See [Searching](#) for more information about working with the search box.

- **Discover** - starts the *New Discover Connections Task* wizard to discover Connections in the source tenant. See [Discovering Connections](#) for more information.
- **Assign Connection Profile** - starts the *Create New Connection Profile Task* wizard to assign a Connection Profile to a discovered Connection before it can be migrated. See [Creating and Assigning Connection Profiles](#) for more information.
- **Migrate** - starts the *New Migrate Connections Task* wizard. See [Migrating Connections](#) for more information.
- **Delete** - deletes one or more selected connections.
- **New Collection, Add to Collection, More > Import Collection** - see [Managing Power BI objects with Collections](#) for more information.

**List View** - displays information about Gateways in the source tenant. Use **Edit Columns** to show or hide columns in the list. The columns are as described below:

- **Name** - name of the source tenant connections.
- **Connection State** - state of the task in the migration process. Values are as listed below:
  - **Discovered** - Connections discovered in the source tenant.
  - **Queued** - waiting for service resources to be available. For more information, see [How Queuing Works](#).
  - **Migrating** - Connections migration in progress.
  - **Migrated** - Connections migrated successfully to the target tenant.
  - **Migrated with Issues** - Connections migration completed but there were issues during migration.
  - **Migration Failed** - Connections could not be migrated.
  - **Stopped** - Connections migration has been halted.
- **Type** - the type of connection to a data repository. Valid values are *File* (any file that contains data like Microsoft Excel) and *Sql* (includes both Azure and on-premise SQL servers)
- **Users** - displays all users who have owner right for the connection.
- **Discovered On** - date and time the source tenant gateway was discovered by a discovery task.
- **Gateway Name** - name of the gateway that is used by the connection.
- **Assigned Connection Profile** - name of the Profile when it is assigned to the Connection.
- **Target Binding** - Valid values are *Supported* and *Unsupported*.

- **Collections** - indicates the most recent collection where the corresponding Connection is added and the number of additional collections that also contain this object.

## Connection Details

When you select a Power BI Connection from the List View, the Connection Detail pane opens. The information in the pane is described below:

- **Description** - name of the Connection in the source tenant.
- **Events** - count of the events that occurred during one or more tasks.
- **Tasks** - list of tasks invoked for the selected Connection.
- **Collections** - list of collections that contain the selected Connection.

## Connection Profiles List View

The Connection Profiles List View is comprised of the following components:

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

**List View Actions Menu** - contains links to Connection Profile actions and the search box. Each action is explained in greater detail in subsequent topics. See [Searching](#) for more information about working with the search box.

- **Create** - creates a new connection profile with user name, password and profile name for scenarios when you need to assign the same connection profile for multiple connections. Otherwise, use the **Assign Connection Profile** task from *Connections* tab to create and assign a connection profile to a specific connection.
- **Edit** - updates the user name and password for an existing connection profile.
- **Delete** - deletes one or more selected connection profiles.
- **New Collection, Add to Collection, More > Import Collection** - see [Managing Power BI objects with Collections](#) for more information.

**List View** - displays information about Connection Profiles in the source tenant. Use **Edit Columns** to show or hide columns in the list. The columns are as described below:

- **Name** - name of the connection profile.
- **Collections** - indicates the most recent collection where the corresponding Connection Profile is added and the number of additional collections that also contain this object.

## Connection Profile Details

When you select a Power BI Connection Profile from the List View, the Connection Profile Detail pane opens. The information in the pane is described below:

- **Description** - name of the Connection Profile in the source tenant.
- **Events** - count of the events that occurred during one or more tasks.
- **Tasks** - list of tasks invoked for the selected Connection Profile.
- **Collections** - list of collections that contain the selected Connection Profile.

# Configuring the Project

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. From the project *Dashboard* click **Open** in the Power BI tile.
5. Click **Configure Project** on the Power BI project dashboard menu. The *Edit Project* wizard starts
6. **Project Settings**  
Set the default settings as described below:
  - **Default Target Admin User** - enter the user principal name (UPN) of the target tenant administrator.
  - **Source Security Group Name** - name of the Microsoft Entra security group in your source tenant assigned to the Power BI workspaces.
  - **Target Security Group Name** - name of the Microsoft Entra security group in your target tenant assigned to the Power BI workspaces.
7. **Collision Handling**  
If a source workspace with the same name exists in the target environment, specify the following defaults to determine how the provisioning task will manage collision handling to resolve naming conflicts. These values are used in the *New Workspace Provisioning Task* wizard and you can change them in the wizard if necessary.
  - **Prefix** - enter a text value to add before the workspace name.
  - **Suffix** - enter a text value to add after the workspace name.
8. Click **Finish**.

## Connecting to Power BI

The consents and permissions required to connect, access and migrate the Power BI application and data in the source and target tenants, requires a two-part manual setup process. See [Consents and permissions](#) for more information about manual setup steps.

This topic describes the steps to run a task to verify whether or not the **Quest On Demand - Migration - Power BI** enterprise application service principal is granted the necessary permissions to work with the Power BI application in the source and target tenants.

### Starting the Test Power BI Connection Task

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the *Power BI* tile, or click **Open** from the *Power BI* tile to open the *Power BI* migration workspace.
5. Open the *Dashboard* tab. Then click **Connect to Power BI** to start the *Connect to Power BI Task* wizard. Each step is described below:



## 6. Prerequisite Setup

This is an information step that tells you to verify that you have manually completed the setup steps described in the [Consents and permissions](#) topic. If you have not completed the manual setup steps, you must do it now.

## 7. 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** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- b. Click **Next**.

## 8. Summary

- a. Verify the task specifications as described below:
  - i. **Name** - name of the task. You can specify a custom name. Default name is **Test Power BI Connection**.
  - ii. **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.

## Reviewing the Test Power BI Connection Task

1. Open the **Tasks** tab.
2. Select the Power BI task that you want to review.
3. In the task details pane that opens, the information presented is as described below:
  - a. **Task Status** - Status of the task.
  - b. **Type** - Type of the task. The type is **TestPowerBIConnection**.
  - c. **Created** - Date and time when the task was created.
  - d. **Modified** - Date and time when the task was last updated.
  - 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.

## Reviewing the Test Power BI Connection Task Events

1. Open the **Tasks** tab.
2. Select the Test Power BI Connection 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** - name of the Power BI object if applicable.
  - b. **Task** - name of the task.
  - c. **Time** - date and time when the event occurred.

# Discovering Power BI Content

This topic describes the various ways you can discover Power BI content.

In this topic:

- [Prerequisites](#)
- [Considerations](#)
- [Discovering all contents](#)
- [Discovering Source Workspaces](#)
- [Discovering Target Workspaces](#)
- [Resetting Workspaces](#)
- [Discovering Gateways](#)
- [Discovering Connections](#)
- [Reviewing Tasks](#)
- [Reviewing Events](#)

## Prerequisites

- The **Test Power BI Connection** task must be run before **Discover All Contents** can be processed.
- The **Test Power BI Connection** task must successfully connect to the source tenant to process **Discover All Contents**.
- The **Test Power BI Connection** task must successfully connect to both the source and target tenant to process migrations.

## Considerations

We strongly recommend that you run only one discovery task at a time to avoid scheduling delays.

## Discovering all contents

This is a unified approach which uses the Discover All Contents task to inspect the source tenant and discover all Power BI instances of Workspaces, Gateways and Connections.

**i** **NOTE:** Discovering all contents is recommended as the first of all discovery tasks. This task will collect data for Workspaces, Gateways and Connections. This information will be indicated in the pre-migration report. To complete the pre-migration report, you must also run the Collect Statistics task. Workspaces, Gateways and Connections can also be discovered separately using dedicated discovery tasks that are usually recommended for the discovery of newer Power BI objects, such as a refresh from the source tenant.

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. From the *Power BI* tile on the project dashboard click **Open**. Then select the **Dashboard** tab.

5. Click **Discover All Contents** in the Dashboard menu. The *New Discover All Contents Task* wizard starts. Each step is described below:
6. **Discovery Options**
  - a. **Refresh permissions** - select this option to ensure that service principal permissions are up to date. Permissions can be refreshed once per hour. When service principal permissions are updated in Power BI, they may not be immediately available to API calls. This option ensures that service principal permissions are refreshed and fully updated.
  - b. **Continue From Last Discovery** - select this option to continue the discovery of Power BI objects from the last discovery task if the task did not complete successfully. Selecting this option will help you save discovery time because the task can skip the objects already discovered.
  - c. Click **Next**.
7. **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** - task runs immediately.
    - **Run later** - task must be started manually.
    - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
  - b. Click **Next**.
8. **Summary**
  - a. Verify the task specifications as described below:
    - i. **Name** - name of the task. The default name is **Discover All Contents**. You can specify a custom name.
    - ii. **Refresh permissions** - indicates whether or not the **Refresh permissions** option has been selected.
    - 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 *Workspaces*, *Gateways* and *Connections* lists are updated.

## Discovering Source Workspaces

This section describes the steps to discover Power BI Workspaces in the source tenant.

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. From the *Power BI* tile on the project dashboard click **Open**. Then select the **Workspaces** tab.
5. Click **Discover** in the List View menu. The *New Discover Source Workspaces Task* wizard starts.

## 6. Discovery Options

- a. **Refresh permissions** - select this option to ensure that service principal permissions are up to date. Permissions can be refreshed once per hour. When service principal permissions are updated in Power BI, they may not be immediately available to API calls. This option ensures that service principal permissions are refreshed and fully updated. When you select this option, the task also validates whether the workspaces are secured by the Microsoft Entra security group, and the access level is set to Administrator.
- b. **Continue From Last Discovery** - select this option to continue the discovery of Power BI objects from the last discovery task if the task did not complete successfully. Selecting this option will help you save discovery time because the task can skip the objects already discovered.
- c. Click **Next**.

## 7. 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** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- b. Click **Next**.

## 8. Summary

- a. Verify the task specifications as described below:
  - i. **Name** - name of the task. The default name is **Discover Source Workspaces**. You can specify a custom name.
  - ii. **Refresh permissions** - indicates whether or not the **Refresh permissions** option has been selected.
  - 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 *Workspaces* list is updated.



**NOTE:** The discovery task discovers all supported and unsupported workspaces in the source tenant. The total number of workspaces discovered is indicated in the events list. However, only supported workspaces are listed in the *Workspaces* list.

## Discovering Target Workspaces

This section describes the steps to discover Power BI Workspaces in the target tenant. Run this task after you run the **Discover Source Workspaces** to check whether discovered source workspaces are already present in the target.

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

4. From the *Power BI* tile on the project dashboard click **Open**. Then select the **Workspaces** tab.
5. Click **Discover** in the List View menu. The *New Discover Target Workspaces Task* wizard starts.
6. **Discovery Options**
  - a. **Refresh permissions** - select this option to ensure that service principal permissions are up to date. Permissions can be refreshed once per hour. When service principal permissions are updated in Power BI, they may not be immediately available to API calls. This option ensures that service principal permissions are refreshed and fully updated. When you select this option, the task also validates whether the workspaces are secured by the Microsoft Entra security group, and the access level is set to Administrator.
  - b. **Continue From Last Discovery** - select this option to continue the discovery of Power BI objects from the last discovery task if the task did not complete successfully. Selecting this option will help you save discovery time because the task can skip the objects already discovered.
  - c. Click **Next**.
7. **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** - task runs immediately.
    - **Run later** - task must be started manually.
    - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
  - b. Click **Next**.
8. **Summary**
  - a. Verify the task specifications as described below:
    - i. **Name** - name of the task. The default name is **Discover Target Workspaces**. You can specify a custom name.
    - ii. **Refresh permissions** - indicates whether or not the **Refresh permissions** option has been selected.
    - 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 *Workspaces* list is updated. If a source workspace is found in the target tenant, the *Workspace State* column will change to **Exists in Target**.

## Resetting Workspaces

If you delete a workspace in the target environment to recreate, rename, or simply start over again, the **Reset Workspace** action can reset the source workspace to the discovered state. This action removes mappings and all other dependencies to the target workspace. The steps to reset one or more workspaces are described below:

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

4. Click *Power BI* from the project tiles, or click **Open** from the Power BI tile to open the Power BI migration workspace.
5. Click the *Workspaces* tab and select one or more workspaces to reset.
6. From the Actions menu, click **More > Reset Workspace**. The *New Reset Workspace Task* wizard starts. Each step is described below:
7. **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** - task runs immediately.
    - **Run later** - task must be started manually.
    - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
  - b. Click **Next**.
8. **Summary**
  - a. Verify the task specifications as described below:
    - i. **Name** - name of the task. The default name is **Reset Workspaces**. You can specify a custom name.
    - ii. **Scheduled start** - date and time when the task will start. **Now** indicates that the task will start immediately.
9. When the task completes, the workspace is rediscovered, and the **Workspace State** column value of the selected workspaces in the *Workspaces* list changes to *Discovered*

## Discovering Gateways

This section describes the steps to discover Power BI Gateways.

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. From the *Power BI* tile on the project dashboard click **Open**. Then select the **Gateways** tab.
5. Click **Discover** in the List View menu. The *New Discover Gateways Task* wizard starts.
6. **Discovery Options**
  - a. **Refresh permissions** - select this option to ensure that service principal permissions are up to date. Permissions can be refreshed once per hour. When service principal permissions are updated in Power BI, they may not be immediately available to API calls. This option ensures that service principal permissions are refreshed and fully updated.
  - b. Click **Next**.
7. **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** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- b. Click **Next**.
8. **Summary**
- a. Verify the task specifications as described below:
- i. **Name** - name of the task. The default name is **Discover Gateways**. You can specify a custom name.
  - ii. **Refresh permissions** - indicates whether or not the **Refresh permissions** option has been selected.
  - 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 *Gateways* list is updated.

## Discovering Connections

This section describes the steps to discover Power BI Connections.

### **To start the Discover Connections 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 **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. From the *Power BI* tile on the project dashboard click **Open**. Then select the **Connections** tab.
5. Click **Discover** in the List View menu. The *New Discover Connections Task* wizard starts.
6. **Discovery Options**
  - a. **Refresh permissions** - select this option to ensure that service principal permissions are up to date. Permissions can be refreshed once per hour. When service principal permissions are updated in Power BI, they may not be immediately available to API calls. This option ensures that service principal permissions are refreshed and fully updated.
  - b. Click **Next**.
7. **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** - task runs immediately.
    - **Run later** - task must be started manually.
    - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.



- b. Click **Next**.
8. **Summary**
  - a. Verify the task specifications as described below:
    - i. **Name** - name of the task. The default name is **Discover Connections**. You can specify a custom name.
    - ii. **Refresh permissions** - indicates whether or not the **Refresh permissions** option has been selected.
    - 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 *Connections* list is updated.

## Reviewing Tasks

1. Open the **Tasks** tab.
2. Select the discovery task that you want to review.
3. In the task details pane that opens, review the information presented
4. From the task details pane, click **Download Premigration Report**. Download and save the ZIP file to a suitable folder, and extract the report.

## Reviewing events for a Task

1. Open 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 task details pane that opens, the information presented is as described below:
  - a. **Object** - name of the Power BI object if applicable.
  - b. **Task** - name of the task.
  - c. **Time** - date and time when the event occurred.

# Collecting Statistics

The **Collect Statistics Task** for Power BI conducts an assessment of all Power BI content types in the source tenant. It provides summarized and detailed premigration information about workspace types, gateways, semantic models, connections, reports and users.

In this topic:

- [Prerequisite](#)
- [Starting a Collect Statistics Task](#)

- [Reviewing the Collect Statistics Task](#)
- [Reviewing the events for the Collect Statistics Task](#)

## Prerequisite

The **Discover All Contents** task must be run once before collecting statistics.


## Starting a 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 **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **Power BI** tile, or click **Open** from the Power BI tile to open the *Power BI* workspace.
5. Select the **Dashboard** tab. Click **Collect Statistics** from the *Actions* menu. The *New Collect Statistics Task* wizard starts. Each step is described below:
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** - task runs immediately.
    - **Run later** - task must be started manually.
    - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
  - b. Click **Next**.
7. **Summary**
  - a. Verify the task specifications as described below:
    - i. **Name** - name of the task. You can specify a custom name. Default name is **Collect Statistics Task**.
    - ii. **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.

## Reviewing the Collect Statistics Task

1. Open the **Tasks** tab.
2. Select the Collect Statistics task that you want to review.
3. In the task details pane that opens, the information presented is as described below:
  - a. **Task Status** - Indicates whether the task is completed.
  - b. **Type** - Type of the task. The type is `CollectStatistics`.
  - c. **Created** - Date and time when the task was created.
  - d. **Modified** - Date and time when the task was last updated.
  - e. **Status** - State of the task.

- f. **Last Operation** - The action that was most recently performed in this task.
- g. **Schedule** - Date and time when the task started. **Now** indicates that the task started immediately after the task was created.
- h. **Events (number)** - The number of events that the task encountered.
- i. From the task details pane, click **Download Premigration Report**. Download and save the ZIP file to a suitable folder, and extract the report.


Collect Statistics

Task Status	Completed
Type	CollectStatistics
Created	Thursday, June 20, 2024 3:06 PM
Modified	Thursday, June 20, 2024 3:14 PM
Last Operation	Collected Statistics
Schedule	Now
Events (8)	 8

Copy Diagnostics

Download Premigration Report

## Reviewing the events for the Collect Statistics Task

1. Open 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 task details pane that opens, the information presented is as described below:
  - a. **Object** - name of the Power BI object if applicable.
  - b. **Task** - name of the task.
  - c. **Time** - date and time when the event occurred.

# Managing Power BI objects with Collections

Migrating large numbers of Power BI objects requires careful planning. Organize the Power BI objects into collections to make large lists more manageable. Collections can be created for Workspaces, Gateways, Connections and Connection Profiles. The process described below is common to all Power BI objects.

In this topic:

- [Adding Power BI Objects to Collections](#)
- [Working with the Collections Dashboard](#)

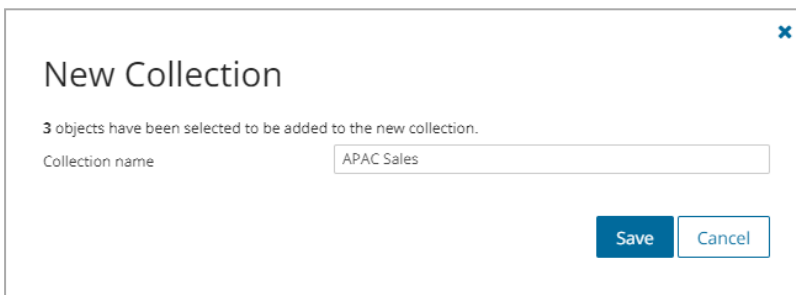
## Adding Power BI Objects to Collections

You can add Power BI objects to collections in several ways:

- Select one or more Power BI objects and add to a new collection
- Select one or more Power BI object and add to an existing collection
- Use a CSV file to add Power BI objects to one or more collection

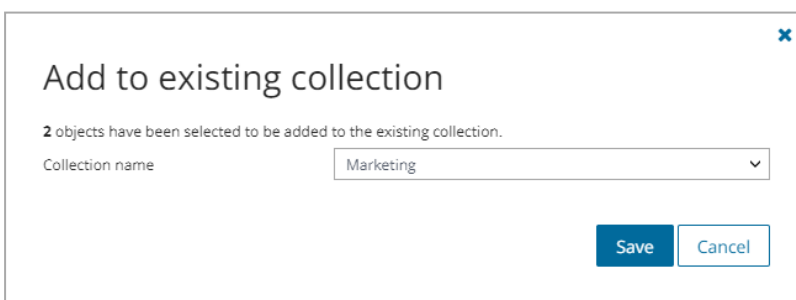
### **To add selected Power BI objects to a new collection:**

1. From the project dashboard, click **Open** in the *Power BI* tile to open the *Power BI* migration workspace.
2. Click a Power BI object tab and select the Power BI objects you want to add to the collection.
3. From the Actions toolbar, click **Collections > New Collection**. The *New Collection* dialog opens.
4. Enter a collection name in the **Collection name** field and click **Save** to add the selected Power BI objects to the collection.

A screenshot of the 'New Collection' dialog box. It has a title bar with a close button (X). The main heading is 'New Collection'. Below it, a message states '3 objects have been selected to be added to the new collection.' There is a text input field labeled 'Collection name' containing the text 'APAC Sales'. At the bottom right, there are two buttons: 'Save' and 'Cancel'.

### **To add selected Power BI objects to an existing collection:**

1. From the project dashboard, click **Open** in the *Power BI* tile to open the *Power BI* migration workspace.
2. Click a Power BI object tab and select the Power BI objects you want to add to an existing collection.
3. From the actions toolbar, click **Collections > Add To Collection**. The *Add to existing collection* dialog opens.
4. Select a collection from the **Collection name** dropdown and click **Save** to add the selected Power BI objects to the collection.

A screenshot of the 'Add to existing collection' dialog box. It has a title bar with a close button (X). The main heading is 'Add to existing collection'. Below it, a message states '2 objects have been selected to be added to the existing collection.' There is a dropdown menu labeled 'Collection name' with 'Marketing' selected. At the bottom right, there are two buttons: 'Save' and 'Cancel'.

### **To add Power BI objects to one or more collections with a CSV file:**

Using a CSV file provides the following additional benefits:

- Multiple collections can be created with the same CSV file.
- Existing collections can be specified in the CSV file to add additional objects.
- Power BI objects can be listed in multiple collections.

This is a two-step process as described below to add Power BI objects to an existing collection from a Power BI object tab:

### Step 1: Prepare the CSV file

1. From the actions toolbar, click **Collections > Import Collections**. The *New Import Collections from File Task* wizard starts.
2. From the **Mapping File** step, click **Download Example File**. A ZIP file is downloaded.
3. Extract the CSV file and use it to prepare your import file in one of three formats described below:

**i** **NOTE:** CSV file names with non-ASCII characters are not supported. Power BI objects in the CSV that have not been discovered cannot be added to a collection.

Use the format shown below to prepare the CSV file. The minimal set of columns are described below.

	A	B	C	D
1	ObjectName	ObjectId	ObjectType	CollectionName
2	WorkspaceA	b30c4a92-85ae-429d-9894-46689db0625b	Workspace	CollectionA
3	GatewayA	b30c4a92-85ae-429d-9b0b-46689db05223	Gateway	CollectionA
4	ConnectionA	b30c4a92-85ae-429d-9345-46689db0420a	Connection	CollectionA
5	ConnectionProfileA	b30c4a92-85ae-429d-9ca6-46689db06288	Userprofiles	CollectionA

- **ObjectName** - specify the name of the Power BI object. If you provide this value, specifying the **ObjectId** is optional.

**i** **NOTE:** If there are rows with the same **ObjectName**, only the last row will be added to the collection.

- **ObjectId** - provide the GUID (Globally Unique Identifier) of the Power BI object. If you include this value, then **ObjectName** is optional.

**i** **NOTE:** Use the Premigration report to get the **Object Ids**.  
Alternatively, the **Object Id** GUID can be obtained from the Power BI service application <https://app.powerbi.com>, or by using the Power BI REST API <https://learn.microsoft.com/en-us/rest/api/power-bi>. Try *Get Groups* for Workspaces, *Get Gateways* for Gateways and *Get Datasources* for Connections. For workspace **ObjectId** open the workspace and copy the GUID from the URL.

- **ObjectType** - enter the type of the Power BI object. The options are Workspace, Gateway, Connection, or Userprofiles. This field is required.
- **CollectionName** - provide the name of the collection. This field is required. If a collection name specified in the CSV file does not exist, a new collection will be created with the specified name .

### Step 2: Import the CSV file

1. Open a Power BI object tab.
2. From the actions toolbar, click **Collections > Import Collections**. The *New Import Collections From File Task* wizard starts.

New Import Collections From File Task

Mapping File  
Schedule  
Summary

Select a comma-separated values (CSV) file with collections.  
Example CSV File

```
ObjectName,Objectid,ObjectType,CollectionName
WorkspaceA,,CollectionA
WorkspaceA,Workspace,CollectionB
,e11971c7-9e06-4db7-9493-6723a3728e34,Workspace,CollectionC

GatewayA,,CollectionA
GatewayA,Gateway,CollectionB
,Sbe7143b-59b5-41aa-89ff-ba8efbdb1369,Gateway,CollectionC

ConnectionA,,CollectionA
ConnectionA,Connection,CollectionB
,b8b31a9b-4f7f-4f08-96ac-0e8e0ada8b00,Connection,CollectionC

ConnectionProfileA,,CollectionA
ConnectionProfileA,UserProfiles,CollectionB
,JsF6bpAB4HcU-G-sO68Y,Userprofiles,CollectionC
```

Browse...

Step 1 of 3

Back Next Finish Cancel

### 3. Mapping File

- a. Click **Browse** and select the CSV file. The selected CSV file name appears.

### 4. 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** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- b. Click **Next**.

### 5. Summary

- a. Verify the task specifications as described below:
  - i. **Name** - name of the task. The default name is **Import Collections From File**. You can specify a custom name.
  - ii. **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.
- c. Click **Finish**.

#### **To verify the addition of a Power BI object to a collection:**

1. Check the **Collections** column in the Workspaces List View, Gateways List View, Connections List View or the Connection Profiles List View that indicates the most recent collection where the corresponding Power

BI object has been added and the number of additional collections that also contain the Power BI object.

2. Select a Power BI from the list view to open the Power BI object Detail pane. Check the **Collections** property that lists all the collections where the Power BI object has been added.

## Working with the Collections Dashboard

The Collections Dashboard shows the collection-specific summary, allows you to see Power BI objects added to it, create tasks for them, and monitor the progress of tasks.

### *To view the collection dashboard for an existing collection:*

- a. From the project dashboard, click **Open** in the *Power BI* tile to open the *Power BI* migration workspace.
- b. From the top-right corner of the workspace, click **Select Collection** and then select the collection to view. The collection *Dashboard* is displayed.
- c. Open the **Power BI** tab. You will see the list of Power BI objects that belong to the collection.

### *To remove items from a collection:*

- a. From the actions toolbar, click **Collections > Remove from Collection**.
- b. In the confirmation dialog click **Remove** to remove the selected Power BI objects from the collection.

### *To rename the collection:*

- a. Click **Collections > Rename Collection** in the Actions toolbar of the collections dashboard.

### *To delete the collection:*

- a. Click **Collections > Delete Collection** in the Actions toolbar of the collections dashboard.

### *To see the tasks for collection-specific Power BI objects:*

- a. Open the **Tasks** tab.

### *To see the events related to the collection:*

- a. Open the **Events** tab.

### *To return to the Power BI migration workspace:*

- a. Click the collection dropdown at the top-right corner of the page, and select **Show All**.

# Creating and Assigning Connection Profiles

A connection profile is a named set of credentials that is assigned to discovered Connections before they can be migrated. These credentials are required by Microsoft Power BI to read the source data and create the Connection in the target tenant.

**i** **NOTE:** Creating a Connection Profile requires credentials that are securely stored in the On Demand Migration repository. It is recommended to create a profile when Connections are expected to be migrated. When you complete the Connection migration, you may delete the Connection Profile to remove the credentials from the On Demand Migration repository.

See the [On Demand Migration - PowerBI](#) security guide for more information about how On Demand Migration secures sensitive information.

## To create profiles

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. From the *Power BI* tile on the project dashboard click **Open**. Then select the **Connection Profiles** tab.
5. Click **Create** in the List View menu. The *Create New Connection Profile Task* wizard starts.
6. **Connection Profile**
  - a. Specify the information for the fields described below:
    - **User name** - unique identifier associated with an individual user permitted to access the connection in the format `domain\user`.
    - **Password** - password to verify the identity of the user.
    - **Profile name** - name of the connection profile. If you use the name of an existing profile, you can modify the profile by selecting the **Overwrite existing** option.
    - **Overwrite existing** - select this option to alter a profile with the same name if it exists.
7. **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** - task runs immediately.
    - **Run later** - task must be started manually.
    - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
  - b. Click **Next**.
8. **Summary**
  - a. Verify the task specifications as described below:
    - i. **Name** - name of the task. The default name is **New Connection Profile**. You can specify a custom name.



- ii. **User name** - unique identifier of a user permitted to access the connection.
  - iii. **Profile name** - name of the connection profile.
  - iv. **Overwrite existing** - indicates whether or not a preexisting profile must be modified if it exists.
  - v. **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 assign profiles

1. From the Power BI workspace select the Connections tab.
2. Select one or more Connections. You can select a Connection that is already assigned if you want to change the profile assigned to the Connection, or you can select an unassigned Connection.
3. Click **Assign Connection Profile** in the List View menu. The *New Connection Profile Task* wizard starts.
4. **Connection Profile**
  - a. **Assign an existing connection profile** - select this option to assign an existing connection profile.
    - **Select a connection profile** - click the dropdown and select a connection profile.
  - b. **Assign a new connection profile** - select this option to create and assign a new connection profile. Specify the information for the fields described below:
    - **User name** - unique identifier associated with an individual user permitted to access the connection in the format `domain\user`.
    - **Password** - password to verify the identity of the user.
    - **Profile name** - name of the connection profile. If you use the name of an existing profile, you can modify the profile by selecting the Overwrite existing option.
    - **Overwrite existing** - select this option to alter a profile with the same name if it exists.
  - c. Click **Next**.
5. **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** - task runs immediately.
    - **Run later** - task must be started manually.
    - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
  - b. Click **Next**.
6. **Summary**
  - a. Verify the task specifications as described below:
    - i. **Name** - name of the task. The default name is **Assign Connection Profile**. You can specify a custom name.
    - ii. **User name** - unique identifier of a user permitted to access the connection.

- iii. **Profile name** - name of the connection profile.
  - iv. **Overwrite existing** - indicates whether or not a preexisting profile must be modified if it exists.
  - v. **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.
7. When the task completes, the selected Connections will be assigned to a named profile. The **Assigned Connection Profile** column value in the List View will be set to the profile name.

## Refreshing Permissions

This task ensures that service principal permissions for Workspaces and Connections in the source tenant are refreshed and fully updated.



**NOTE:** Permissions can be refreshed once per hour. When service principal permissions are updated in Power BI, they may not be immediately available to API calls.

To refresh permissions, follow the steps described below:

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. From the *Power BI* tile on the project dashboard click **Open**. Then select the **Workspaces** tab.
5. Select one or more workspaces to validate.
6. Click **More > Refresh Permissions** in the List View menu. The *New Refresh Permissions Task* wizard starts.
7. **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** - task runs immediately.
    - **Run later** - task must be started manually.
    - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
  - b. Click **Next**.
8. **Summary**
  - a. Verify the task specifications as described below:
    - i. **Name** - name of the task. The default name is **Refresh Permissions**. You can specify a custom name.
    - ii. **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, connection and workspace permissions are refreshed.


## Mapping Workspaces

Use this method to map specific Power BI Workspaces from the source to a Power BI Workspace that may or may not exist in the target tenant. If the Workspace exists in the target tenant, it will be merged with the target Workspace and the source data is used to resolve any merge conflicts. If the target Workspace does not exist, a new Workspace will be created.

The CSV file lets you specify the Workspaces that you want to map and ignore the rest. You can then use this file in the *New Mapping from File Task* wizard to map the Power BI Workspaces from the source to the target tenant.

This is a two-step process as described below:

### Creating a mapping file

1. Prepare a comma-separated values (CSV) file with the source and target Workspace names.
2.  **NOTE:**
  - You can download a CSV template when you start the *New Mapping from File Task* wizard and click **Download Example File** from the **Mapping File** step.
  - CSV file names with non-ASCII characters are not supported.
3. The header row defines the names of the source and target attributes used for mapping. Subsequent rows list the mapping values of the attributes.

The columns are as follows:

  - **Source Workspace Name** - unique name of the source Power BI Workspace. The column header is case sensitive.
  - **Target Workspace Name** - unique name of the Power BI Workspace. The column header is case sensitive. In cases where a mapping is not applied and the **Target Workspace** does not have a value, the **Name** of the source Workspace will be used for the migration to the target tenant.
4. Save the CSV file. You may rename the file if needed.

### Starting a Map Workspaces From File 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 **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. From the *Power BI* tile on the project dashboard click **Open**. Then select the **Workspaces** tab.
5. From the Actions menu, click **More** and then select **Map from File**. The *New Mapping from File Task* wizard starts. Each step is described below:
6. **Mapping File**
  - a. Click **Browse** and select the CSV mapping file. The selected file name appears next to the **Browse** button.
  - b. Click **Next**.

## 7. 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** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- b. Click **Next**.

## 8. Summary

- a. Verify the task specifications as described below:
    - i. **Name** - name of the task. The default name is **Map Workspaces From File**. You can specify a custom name.
    - ii. **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 **Target Workspace** column in the *Workspaces* list indicates the mapped Workspace in the target tenant.

# Matching and Mapping Gateways

## Prerequisites

Gateways must be configured in the target tenant at any time before matching or mapping the Gateways, and migrating any Connections or Workspaces.

There are two ways to match Gateways from the source to a target tenant:

- [Matching Gateways from the Gateways list](#)
- [Mapping Gateways from a file](#)

## Matching Gateways from the Gateways list

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. From the *Power BI* tile on the project dashboard click **Open**. Then select the **Gateways** tab.
5. Select one or more Gateways that you want to match to a target tenant.
6. Click **Match** in the List View menu and then select **Match Selected**. The *New Match Gateways Task* wizard starts. Each step is described below:

## 7. 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** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- b. Click **Next**.

## 8. Summary

- a. Verify the task specifications as described below:
    - i. **Name** - name of the task. The default name is **Match Gateways**. You can specify a custom name.
    - ii. **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 **Target Gateway** column in the *Gateways* list indicates the matched Gateway in the target tenant.

## Mapping Gateways from a file

To match source Gateways to target Gateways with different names, a CSV file is used to indicate the mapping between source and target Gateways, as described below.

### *To create the mapping file:*

1. Prepare a comma-separated values (CSV) file with the source and target Gateway names.
2. The header row defines the names of the source and target attributes used for mapping. Subsequent rows list the mapping values of the attributes.

The columns are as follows:

  - **Name** - unique name of the source Gateway. The column header is case sensitive.
  - **Target Gateway** - unique name of the Gateway in target tenant. The column header is case sensitive.
3. Save the CSV file. You may rename the file if needed.

### *To upload the mapping 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 **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. From the *Power BI* tile on the project dashboard click **Open**. Then select the **Gateways** tab.
5. Select one or more Gateways that you want to map to a target tenant.

6. Click **Match** in the List View menu and then select **Map from File**. The *Import Gateways Matching Task* wizard starts.
7. **Import Gateways Mapping Options**
  - a. Click **Browse** and select the CSV mapping file. The selected file name appears next to the **Browse** button.
  - b. Click **Next**.
8. **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** - task runs immediately.
    - **Run later** - task must be started manually.
    - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
  - b. Click **Next**.
9. **Summary**
  - a. Verify the task specifications as described below:
    - i. **Name** - name of the task. The default name is **Import Gateways Mapping**. You can specify a custom name.
    - ii. **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. When the task completes, the **Target Gateway** column in the *Gateways* list indicates the mapped Gateway in the target tenant.

## Provisioning Workspaces

The provisioning task helps you with the following premigration preparations:

- Automap and provision shared workspaces by source workspace name.
- Provision shared workspaces that were mapped using the **Map from File** action.
- Resolve workspace naming conflicts.
- Apply permissions to target workspaces based on source permissions.
- Reprovision workspaces to refresh permissions on target workspaces.

In this topic:

- [Considerations](#)
- [Starting a provisioning task](#)

## Considerations

1. After all source-shared workspaces are discovered, you can begin provisioning workspaces in the target tenant using a **Workspace Provisioning** task.
2. During provisioning of the workspace in the target tenant, the license mode set to **Pro** license.
3. Workspaces must be provisioned before their contents can be migrated.
4. Verify that all associated accounts are matched or migrated before creating the provisioning task.
5. When workspaces are provisioned, the service principal used by ODMPI in the target tenant will be assigned to the workspace with the Admin role.
6. If workspaces are to be merged, the Quest service principal or security group created during the setup process in the target tenant must be added to the target workspace with the Admin role before performing provisioning.
7. The Power BI service requires at least one user account or security group with the Admin role to manage a workspace in the Power BI portal.
8. If workspace access permissions are changed in the source environment after a workspace is provisioned, you must re-provision the workspace to refresh the permissions on the target workspace.
9. Workspaces in the target tenant can take up to 2 hours to become available and for permissions updates to be fully processed in the target tenant after a workspace is provisioned.

## Starting a Workspace Provisioning Task

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click *Power BI* from the project tiles, or click **Open** from the Power BI tile to open the Power BI migration workspace.
5. Click the *Workspaces* tab and select one or more workspaces.
6. From the Actions menu, click **Provision**. The *New Workspace Provisioning Task* wizard starts. Each step is described below:
7. **Provision Options**

Choose from the following options for the processing that the task should complete

- a. **Provision workspaces using source workspace name or Map from File** – Select this option to preform auto-mapping of the selected workspaces by source name to provision the workspaces in target or to complete provisioning for workspaces that were manually mapped using the Map from file action.

If a source workspace name does not exist on target, a new workspace will be provisioned with the source name.

If a workspace has been mapped from file, the target workspace name provided will be used to provision a new workspace or merge with an existing workspace.

If a source workspace with the same name exists in the target environment, choose from the following options to determine how the task will manage collision handling to resolve naming conflicts:

- **Skip processing, and no changes will be made to the target environment** - select this option to prevent a mapping from being performed and skip any processing of permissions

for the workspace.

- **Merge with the existing workspace in the target environment** - select this option to create a mapping to the target workspace and merge permissions if required.
- **Provision a new workspace in the target environment with the source name and a prefix or suffix** - select this option to create a new workspace name based on the text provided. If the new workspace name also already exists it will be skipped.



**TIP:** Use [Map from file](#) to provision the new workspace with custom name, or to create a custom mapping.

- b. **Provision all workspaces with the source name and a prefix or suffix** - select this option to rename all workspaces being processed and create new workspaces with the text provided. If the new workspace name already exists it will be skipped.



**TIP:** Use this option to bulk archive selected source workspaces into the target environment.

- c. **Refresh permissions for previously provisioned workspaces** - select this option to re-provision workspaces based on the previously mapped name. This will allow for refreshing permissions on the target workspace in the event of changes to the source workspace permissions. The settings for processing the permissions can be completed on the *Permissions* step. This option will not create new workspaces.

## 8. Permissions

Choose from the following options to determine how permissions are managed:

- a. **Default Target Admin User** - specify a user account in the target environment that will be set with the Admin role on provisioned workspaces. This account is used to ensure that management access to a workspace in the Power BI portal is not lost.
- b. **Set Default Target Admin User as workspace Admin** - select this option to apply the **Default Target Admin User** to provisioned workspaces. If this option is not selected then the **Default Target Admin User** will not be applied to workspaces and this may result in cases where a target workspace cannot be managed in the Power BI portal post provisioning.

Choose how the Admin account will be used:

- **Set Always** - select this option to always apply the **Default Target Admin User** permissions during provisioning.
- **Set if no workspace Admin user is mapped** - select this option to apply the **Default Target Admin User** only when there is no other account with the Admin role included in the account mapping.
- c. **Set target workspace permissions** - select this option to apply permissions from the source workspace to the target workspace using the account mappings. If this option is not selected the provisioning may still apply if the **Default Target Admin User** is selected.

Choose how target permissions are set:

- **Add from source** - source accounts and groups that are not in the target are added with the source roles. Existing target accounts and groups are not changed.
- **Update from source** - source accounts and groups that are not in the target are added with the source roles. Source accounts and groups that are already in the target are changed to the source roles. Target accounts and groups that are not in the source are not changed.



- **Synchronize with source** - target accounts and groups are set to the source accounts and groups roles. Target accounts and groups that do not exist in the source are removed.

#### 9. Schedule

- Choose from one of three options to schedule the task. The scheduler will be activated after you complete the task wizard.
  - **Run now** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- Click **Next**.

#### 10. Summary

- Verify the task specifications as described below:
  - Name** - name of the task. The default name is **Provision Workspaces**. You can specify a custom name.
  - Provisioning options** - indicates the provisioning options selected.
  - Permissions** - indicates the permission options selected.
  - Scheduled start** - date and time when the task will start. **Now** indicates that the task will start immediately.
- Click **Back** to revise or review a previous step or click **Finish** to complete the task wizard and start the task as scheduled.

- When the task completes, the **Workspace State** column value of the selected workspaces in the *Workspaces* list changes to *Provisioned*, and the **Target Workspace** column indicates the mapped Workspace in the target tenant (unless there is a custom mapping, in which case it should remain the same).

## Migrating Connections

In this topic:

- [Prerequisites and Considerations](#)
- [Starting an Connections Migration Task](#)
- [Reviewing the Connections Migration Task](#)
- [Reviewing the Connections Migration Task Events](#)

### Prerequisites and Considerations

- Connections can be migrated to the target tenant at any time before performing a Workspace migration.
- A profile must be assigned to the Connection before it can be migrated.
- Gateways that are used by Connections:
  - must be matched before migrating a Connection.
  - must be in an Online state for a Connection migration.

## Starting a Connections 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 **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. From the *Power BI* tile on the project dashboard click **Open**. Then select the **Connections** tab.
5. Select a Connection that you want to migrate.
6. Click **Migrate** in the List View menu. The *New Migrate Connections Task* wizard starts.
7. **Start**
  - a. **Task Name** - You can specify a custom name. The default name is **Migrate Connections**.
  - b. **Use the settings from an existing migration template for this task** - select this option if you have already saved a previous migration templates. if this is the first time you are migrating mailboxes, keep this option unchecked.
    - **Select template** - select a template that you previously created, from the dropdown list.
  - c. **Go to Summary step** - select this option to preserve the settings and go directly to the last step of the wizard. If you do not select this option, but you have selected a template, you can step through the wizard and edit the settings in the template.
  - d. Click **Next**.
8. **Migration Options**

The screenshot shows the 'New Migrate Connections Task' wizard, Step 1 of 3: Migration Options. The left sidebar has three tabs: 'Migration Options' (selected), 'Schedule', and 'Summary'. The main content area has the title 'New Migrate Connections Task' and a close button (X). Below the title, there is a section 'Specify the default target admin user to use for any user that has no match on the target.' with a text input field labeled 'Default Target Admin User' containing the email 'admin@democorp.onmicrosoft.com'. Below this is a section 'Please choose connection privacy level' with four radio button options: 'Organizational' (selected), 'Private', 'Public', and 'None'. There is also a checkbox for 'Incremental migration' which is checked. Below the checkbox, there is a note: 'Enabling this option ensures that in case of any mismatch between existing target and source objects, existing target objects will be overridden in order to be in sync with source.' At the bottom, there is a progress indicator 'Step 1 of 3' and four buttons: 'Back', 'Next' (highlighted in blue), 'Finish', and 'Cancel'.

- a. **Default Target Admin User** - specify the default target admin user to use for any user that has no match on the target. If a default admin user was configured from the project previously, it will automatically appear in this field.
- b. **Privacy Level** - select a privacy level from the following options:
  - **Organizational** - Data from a source with an organizational privacy level is considered to contain organizational data. It can be shared with other organizational data sources, but it won't be shared with external data sources.

- **Private** - Data from a source with a private privacy level is considered to be highly sensitive. It won't be shared with any other data source, even if they are within the same organizational boundary.
  - **Public** - Data from a source with a public privacy level can be shared with other data sources without any restrictions. It's assumed that the data at this level doesn't contain sensitive information.
  - **None** - all data will be migrated regardless of privacy level.
- c. **Incremental migration** - select this option to migrate modified or missing data. This option is very helpful in subsequent migrations to keep your migrated data synchronized between source and target tenants.
- d. Click **Next**.
9. **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** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
- b. Click **Next**.
10. **Summary**
- a. **Save task settings as a migration template** - select this option to save the settings in this wizard as a reusable migration template.
- a. **Migration Template Name** - specify a name for the template. If you have changed the settings of a preselected template, specify the same template name to apply the changes to the template when you complete the wizard. All saved templates are displayed in the [Templates](#) tab.
- b. Verify the task specifications as described below:
- i. **Name** - name of the task. The default name is **Migrate Connections**. You can specify a custom name.
  - ii. **Default Target Admin User** - name of the admin user specified for this task.
  - iii. **Connection privacy level** - privacy level selected in the wizard.
  - iv. **Incremental migration** - indicates whether or not this option has been selected.
  - v. **Scheduled start** - date and time when the task will start. **Now** indicates that the task will start immediately.
- c. Click **Back** to revise or review a previous step or click **Finish** to complete the task wizard and start the task as scheduled.
11. When the task completes, the **Connection State** column in the *Connections* list is updated.

## Reviewing the Connections Migration Task

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

3. In the task details pane that opens, the information presented is as described below:
  - a. **Task Status** - current status of the task.
  - b. **Type** - Type of the task. The type is **MigrateConnections**.
  - c. **Created** - Date and time when the task was created.
  - d. **Modified** - Date and time when the task was last updated.
  - 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.
  - h. **Connections (number)** - The *number* of Connections that were selected for migration and the number of Connections passing through the various states from *Migrating* to *Migrated*.

## Reviewing the Connections Migration Task Events

1. Open the **Tasks** tab.
2. Select the Connections migration 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 event details pane that opens, the information presented is as described below:
  - a. **Object** - name of the Power BI object if applicable.
  - b. **Task** - Name of the task.
  - c. **Time** - Date and time when the event occurred.
  - d. **Summary** - a descriptive statement about the event if an exception occurs.

# Migrating Workspaces

In this topic:

- [Prerequisites](#)
- [Considerations](#)
- [Starting an Migrate Workspaces Task](#)
- [Reviewing the Migrate Workspaces Task](#)
- [Reviewing the Migrate Workspaces Task Events](#)

## Prerequisites

Any Connections that are required by Reports must be migrated before scheduling a Workspace migration.

The **Default Target Admin User** configured in your Power BI project, is added to migrated Workspaces to ensure that access to migrated Workspaces is retained if a matching administrator account is not available for a migrated Workspace. We recommend that you retain this for safety.

## Considerations

Your target tenant might already host Power BI Workspaces created before the migration. In cases where a Workspace name already exists in the destination, the migration will merge report, semantic model and Workspaces permissions data from the source tenant.

After Workspace migration, report users will remain the same as the users in semantic model.

We recommend that you run only one migration task at a time to avoid scheduling delays.

## Starting a Migrate Workspace Objects 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 **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. From the *Power BI* tile on the project dashboard click **Open**. Then select the **Workspaces** tab.
5. Select one or more Workspace that you want to migrate.
6. Click **Migrate** in the List View menu. The *New Migrate Workspace Objects Task* wizard starts.
7. **Start**
  - a. **Task Name** - You can specify a custom name. The default name is **Migrate Workspace Objects**.
  - b. **Use the settings from an existing migration template for this task** - select this option if you have already saved a previous migration templates. if this is the first time you are migrating mailboxes, keep this option unchecked.
    - **Select template** - select a template that you previously created, from the dropdown list.
  - c. **Go to Summary step** - select this option to preserve the settings and go directly to the last step of the wizard. If you do not select this option, but you have selected a template, you can step through the wizard and edit the settings in the template.
  - d. Click **Next**.
8. **Migration Options**

The screenshot shows the 'New Migrate Workspace Objects Task' wizard, Step 2 of 6: Migration Options. The left sidebar shows the progress: Start (checked), Migration Options (active), Processing Options, Permissions, Schedule, and Summary. The main content area shows 'Number of selected workspaces: 1'. There are four radio button options: 'Migrate objects using source names' (selected), 'Migrate objects with the source name and a prefix or a suffix', 'Re-migrate previously processed objects', and 'Refresh permissions for previously migrated objects'. Below these, a note states: 'If the objects do not exist in the target workspace they will be migrated using the source name. If an object with the same name exists in the target workspace:'. There are three radio button options: 'Skip processing and no changes will be made to the target environment' (selected), 'Migrate the object and add a prefix or suffix to the source name', and 'Overwrite the target object'. At the bottom, there are buttons for 'Back', 'Next' (highlighted), 'Finish', and 'Cancel'. The text 'Step 2 of 6' is visible in the bottom left corner.

- a. **Migrate objects using source names** - If the objects do not exist in the target workspace they will be migrated using the source name. If a source object with the same name exists in the target workspace, choose from the following collision handling options:
  - **Skip processing and no changes will be made to the target environment**
  - **Migrate the object and add a prefix or suffix to the source name**  
Enter a prefix or suffix as described below:
    - **Add prefix** - specify a prefix for the workspace object name. Whitespaces are not supported.
    - **Add suffix** - specify a suffix for the workspace object name. Whitespaces are not supported.
  - **Overwrite the target object**
- b. **Migrate objects with the source name and a prefix or a suffix** - Select this option to always create new objects in the target workspace using the specified prefix or suffix for the object names. This task will skip any objects with the new name if they already exist in the target workspace.. Enter a prefix or suffix as described below:
  - **Add prefix** - specify a prefix for the workspace object name. Whitespaces are not supported.
  - **Add suffix** - specify a suffix for the workspace object name. Whitespaces are not supported.
- c. **Re-migrate previously processed objects** - select this option to remigrate workspace objects that were previously migrated and replace the target workspace object with the source object.
- d. **Refresh permissions for previously migrated objects** - select this option will not migrate new objects. It will only update permissions for previously migrated objects based on the Permissions selections.
- e. Click **Next**.

## 9. Processing Options

- a. **Skip rebind** - Select this option to prevent Power BI from retaining the data source connection for reports during migration. After migration, data in the reports cannot be refreshed in the target tenant because the original data source connection information has not been migrated. If you clear this option, data source connection will be migrated but some unsupported data sources connection types, like *SQL with OAuth 2.0 authentication* will be skipped. See [What we migrate](#) for supported data types.
  - **Skip connection rebind for unsupported connections only** - select this option to check the connection type for a semantic model. If the connection type is supported then the data source connection for reports is retained, otherwise the data source connection rebind is skipped during migration.
  - **Always skip connection rebind** - select this option to migrate all reports and semantic models without processing the connection to the original source data.
- b. **Include reports created with a live connection to the Power BI Service** - select this option to migrate reports that were created with a live connection to a previously published semantic model.



**NOTE:** At least one report must be directly bound to a semantic model without a live connection.

- c. **Maintain semantic model names during export** - select this option to retain the source semantic model name when this is extracted through the Power BI export process, and not the default report name for the semantic model.

## 10. Permissions

- a. **Default Target Admin User** - Specify the default target admin user to use as the workspace owner when any workspace user has no match in the target tenant.
- b. **Set workspace content permissions** - select this option to resolve source and target permissions if there is a mismatch between existing content permissions. If this option is not selected, and the Default Target Admin User is not specified, the settings from the existing default target admin user will be used.
  - **Add from source** - this option migrates accounts from the source to the target that are not already in the target. Existing target accounts, groups, and roles remain unchanged. If the source accounts are mapped to target accounts that already have workspace permissions, then those target accounts will not be updated.
  - **Update from source** - this option migrates only mapped accounts with workspace permissions to the target. The target accounts, groups, and roles are updated to match the source permissions. Any existing permissions on the target that do not exist in the source are ignored. Permissions of other accounts in the target workspace that are not mapped to a source account are not updated.
  - **Synchronize with source** - this option updates target accounts, groups and roles to the source permissions. Existing account permissions that are not in the source are removed. After synchronization, target permissions of mapped accounts are the same as the source.

## 11. 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** - task runs immediately.
  - **Run later** - task must be started manually.
  - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.
  - **Priority** - select a priority from the dropdown for the objects scheduled for migration with this task. Values are: **Highest**, **High**, **Medium**, **Low** and **Lowest**. The default priority is **Medium**. If the system is busy, the objects are queued (Migration state = Queued). When the system accepts new migration work, objects are taken from the queue based on the assigned priority and age in the queue.
- b. Click **Next**.

## 12. Summary

- a. **Save task settings as a migration template** - select this option to save the settings in this wizard as a reusable migration template.
  - a. **Migration Template Name** - specify a name for the template. If you have changed the settings of a preselected template, specify the same template name to apply the changes to the template when you complete the wizard. All saved templates are displayed in the [Templates](#) tab.

- b. Verify the task specifications as described below:
    - i. **Name** - name of the task. The default name is **Migrate Workspace Objects**. You can specify a custom name.
    - ii. **Default Target Admin User** - name of the admin user specified for this task.
    - iii. **Incremental migration** - indicates whether or not this option has been selected.
    - iv. **Scheduled start** - date and time when the task will start. **Now** indicates that the task will start immediately.
  - c. Click **Back** to revise or review a previous step or click **Finish** to complete the task wizard and start the task as scheduled.
13. When the task completes, the **Workspace State** column in the *Workspaces* list is updated.

## Reviewing the Migrate Workspaces Task

1. Open the **Tasks** tab.
2. Select the Workspace migration task that you want to review.
3. In the task details pane that opens, the information presented is as described below:
  - a. **Task Status** - current status of the task.
  - b. **Type** - Type of the task. The type is **MigrateWorkspaces**.
  - c. **Created** - Date and time when the task was created.
  - d. **Modified** - Date and time when the task was last updated.
  - 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. **Priority** - the priority of this task.
  - h. **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.
  - i. **Workspaces** (*number*) - The *number* of Workspaces that were selected for migration and the number of Workspaces passing through the various states from *Migrating* to *Migrated*.

## Reviewing the Migrate Workspaces Task Events

1. Open the **Tasks** tab.
2. Select the Workspace migration 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 event details pane that opens, the information presented is as described below:
  - a. **Object** - name of the Power BI object if applicable.
  - b. **Task** - name of the task.
  - c. **Time** - date and time when the event occurred.
  - d. **Summary** - a descriptive statement about the event if an exception occurs.



# 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	<p>Use the following PowerShell script and the group ID provided by the error message to get the group name:</p> <pre> 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 </pre> <p>If this is a source group, fix your source data before proceed for migration.</p> <p>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 rerun provision and migration.</p>

# Finalizing the Migration


Congratulations! The migration is complete.

If you have created a temporary Migration Service account for the migration as described in the [Consents and Permissions](#) topic, it is time to remove it because this account has elevated permissions and could pose security risks.

## Removing the temporary account from Teams

The temporary Migration Service service account that was added to all source and target teams respectively as members or owners, can be removed. To remove the temporary Migration Service service account from the teams and groups use the task wizard described below:

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate > Projects** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **Teams** tile, or click **Open** from the Teams tile to open the *Teams* dashboard.
5. Select the **Teams** tab and select **List View** if not already selected.
6. Select the teams from where you want to remove the Migration Service service account.
 

 **TIP:** Use filters, search or collections to quickly navigate through the list of teams.
7. Click **More > Remove Migration Service Account**. The *Remove Migration Service Account* wizard starts.
8. **Description**
  - a. This task must run last after all migration done. After running, ODM can no longer access the Team for updates.
9. **Notification**
  - a. **Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
    - **Only in a case of failure** - select this option to send the email if the discovery task fails to complete successfully.
  - b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
  - c. Click **Next**.
10. **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** - task runs immediately.
- **Run later** - task must be started manually.
- **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.

b. Click **Next**.

## 11. Summary

a. Verify the task specifications as described below:

- Name** - name of the task. You can specify a custom name. The default name is **Remove Migration Service Account**.
- Source tenant** - name of the source tenant in this project
- Target tenant** - name of the target tenant in this project.
- 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.

# Appendix A: Using PowerShell

You can use the On Demand Migration PowerShell API to interact with objects in your On Demand Migration environment. The PowerShell cmdlets allow you to perform tasks, such as account discovery, mail migration, OneDrive migration, task and event management in a PowerShell scripting environment.

The ODM API is available for install or download from the PowerShell Gallery.



**NOTE:** Usage of the PowerShell Gallery requires the **PowerShellGet** module to be installed on your computer. The module is normally installed with operating system, but may need an upgrade to the latest version. For more information, see [How to Install PowerShellGet](#).

In this topic:

- [On Demand User Role Requirements](#)
- [Deploying the ODM PowerShell API Module](#)
- [Connecting to the ODM service](#)
- [Example: Selecting the organization and migration project](#)
- [Getting Help](#)

## On Demand User Role Requirements

User must have the **Migration Administrator** role to access and run any of the On Demand Migration PowerShell commands. On Demand ships with this role. See the [On Demand Global Settings Current User Guide](#) for more information about setting up roles.

## Deploying the ODM PowerShell API Module

The ODM PowerShell API module must be installed or download from the PowerShell Gallery.

### Searching in PowerShell gallery

```
Find-Module OdmApi -Repository PSGallery
```

### Installing the module from the PowerShell gallery

```
Install-Module OdmApi -Repository PSGallery
```

### Downloading the module from the PowerShell gallery (without installing it)

```
Save-Module OdmApi -Repository PSGallery -Path "C:\temp"
```

## Connecting to the ODM service

Before you can use the ODM PowerShell cmdlets to interact with your ODM environment, you must connect and authenticate your access to your ODM host. The credentials you use must be granted a role with sufficient privileges to work with the On Demand Migration services.

### Connecting to the ODM service - Interactive mode

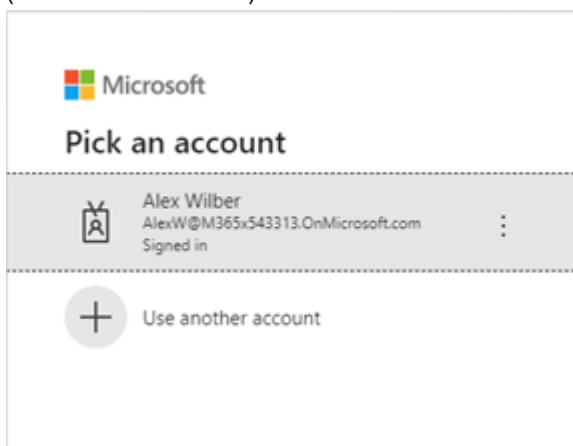
The Microsoft Account Authentication Workflow requires user interaction for the initial authentication with Microsoft. When Microsoft Account authentication is used all authentication is handled via Microsoft and the user's Microsoft Entra ID. This type of authentication supports MFA and is fully controlled by the user's Microsoft Entra ID Conditional Access Policies. Any password and lockout policies are also managed directly by the customer through their Microsoft Entra ID.

1. Run the following command to connect to your ODM Service. The default region is US.

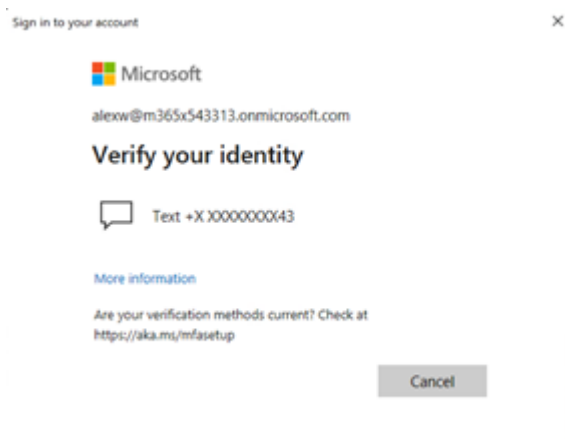
```
Connect-OdmService
```

To connect to a specific region like Europe, run the command `Connect-OdmService -Region EU`. The region value can be set in the **OdmApi.psm1** file by editing this line: `[string]$Region = 'us'`. For example to set default region to Europe replace the line to `[string]$Region = 'EU'`.

2. This command will redirect the user to the Microsoft Authentication workflow to authentication against the user's Azure Active Directory. In the authentication dialog, enter the credentials of the **On Demand** account (not the tenant account)



If MFA is enforced, users will see an additional window



## Connecting to the ODM service - Unattended (or Headless) mode

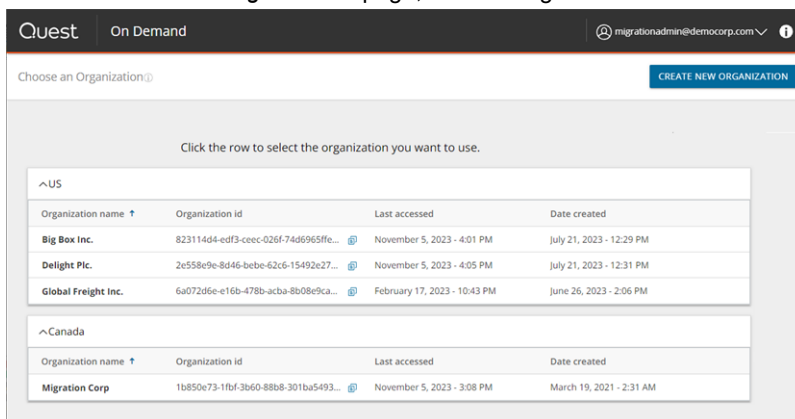
The Microsoft Account Authentication Workflow requires user interaction for the initial authentication with Microsoft. This type of authentication does not support MFA. It is used primarily for work or school accounts. The Tenant ID is required.

```
Connect-OdmService -Username "admin@democorp.com" -Password "P@ssword!" -TenantId "81f2b32e-c198-44fd-99d4-109665c16f34"
```

## Example: Selecting the organization and migration project

### Get the organization id

1. Log in to Quest On Demand.
2. From the *Choose an organization* page, note the organization id.



- or, if you have already selected an organization -

1. Click the logged in user name from the top right corner of the page.
2. Click the **Organization Name** from the drop-down to open the *Edit Organization* page. Then make a note of the organization id.

## Connect to the organization

In your PowerShell session console, enter the command:

```
Select-OdmOrganization -OrganizationId '6a079d6e-e98a-475b-acba-8b08e9caa430'
```

## Select a migration project

Once connected to the Organisation, we need to connect to the Project, the project GUID is required, this is obtained from the ODM GUI or running the command **Get-ODMProject** which will list all past and present projects associated with the ODM organization, an example of this command is below:

```
Get-OdmProject | fl
```

```
Name                : New Migration Project
Description          : Migrate Sales division assets
SourceTenantDefaultDomainName : sourcecorp.onmicrosoft.com
TargetTenantDefaultDomainName : targetcorp.onmicrosoft.com
Id                  : Elf813YBfQYAK6Q42Kun
```

## Connect to your project

Identify the project Id and connect to the project using the following command.

```
Select-OdmProject 'Elf813YBfQYAK6Q42Kun'
```

## Getting Help

OdmApi module supports online help via Get-Help command. Any command syntax and examples of usage can be displayed by the **Get-Help** command.

### Examples:

```
Get-Help Connect-OdmService
```

```

PS C:\> Get-Help Connect-OdmService

NAME
    Connect-OdmService

SYNOPSIS
    Connects to ODM service.

SYNTAX
    Connect-OdmService [[-Region] <String>] [[-Region2EndpointMapUrl] <String>] [[-UserName] <String>] [[-Password] <String>] [[-TenantId] <String>] [-UseIntegratedWindowsAuth] [-PassThru] [<CommonParameters>]

DESCRIPTION
    Connects to ODM service.

RELATED LINKS

REMARKS
    To see the examples, type: "get-help Connect-OdmService -examples".
    For more information, type: "get-help Connect-OdmService -detailed".
    For technical information, type: "get-help Connect-OdmService -full".

```

#### Get-Help Connect-OdmService -Examples

```

PS C:\> Get-Help Connect-OdmService -Examples

NAME
    Connect-OdmService

SYNOPSIS
    Connects to ODM service.

----- EXAMPLE 1 -----

PS C:\>Connect-OdmService

----- EXAMPLE 2 -----

PS C:\>Connect-OdmService -UserName "***" -Password "***"

```

#### Get-Help Connect-OdmService -Full



```

PS C:\> Get-Help Connect-OdmService -Full

NAME
    Connect-OdmService

SYNOPSIS
    Connects to ODM service.

SYNTAX
    Connect-OdmService [[-Region] <String>] [[-Region2EndpointMapUrl] <String>] [[-UserName] <String>] [[-Password] <String>] [[-TenantId] <String>] [-UseIntegratedWindowsAuth] [-PassThru] [<CommonParameters>]

DESCRIPTION
    Connects to ODM service.

PARAMETERS
    -Region <String>
        Specifies connection region. The parameter is optional. "us" is the default.

        Required?                false
        Position?                 1
        Default value              us
        Accept pipeline input?    false
        Accept wildcard characters? false

    -Region2EndpointMapUrl <String>
        Specifies connection region endpoint mapping url. The parameter is optional. "https://odmprodconfiguration.blob.core.windows.net/common/psApiConfiguration.json" is the default.

        Required?                false
        Position?                 2
        Default value              https://odmprodconfiguration.blob.core.windows.net/common/psApiConfiguration.json
        Accept pipeline input?    false
        Accept wildcard characters? false

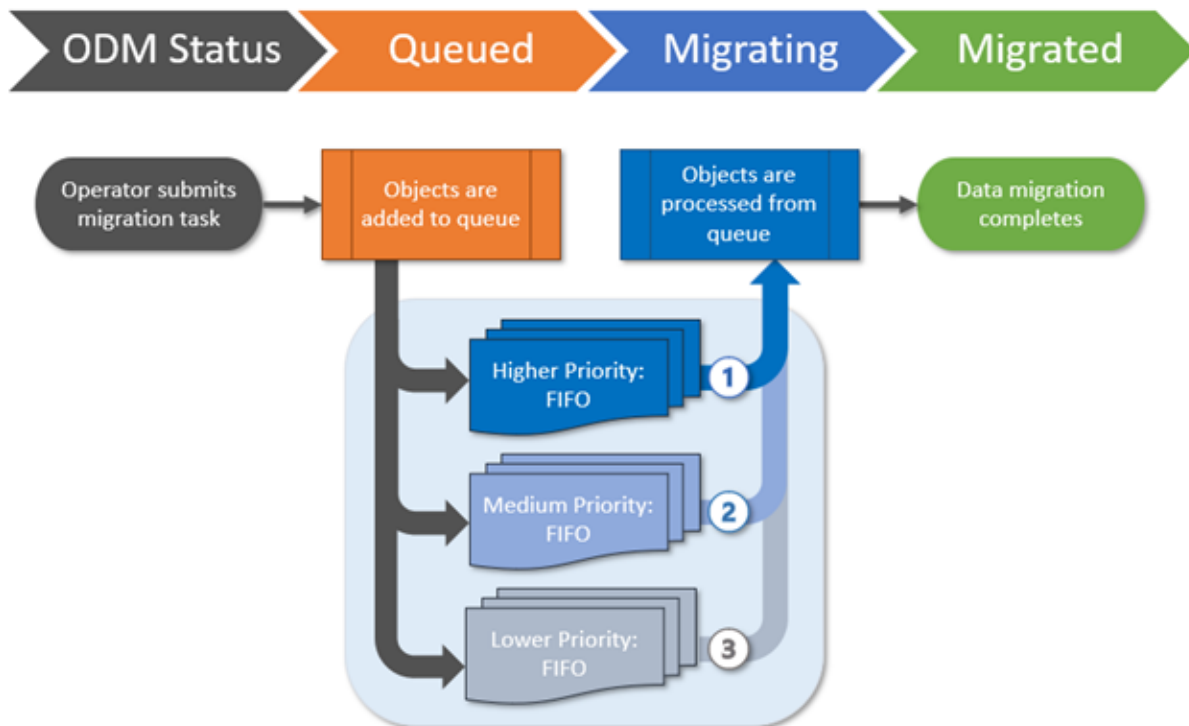
```

# Appendix B: How Queuing Works

Queuing automates task orchestration and simplifies migration planning. Queuing is used in content migration tasks and allows migration operators to submit migration tasks for many objects at once.

## How does queuing work?

When you submit a migration task, On Demand Migration places all objects to be migrated into a queue for that asset, confirms available capacity, and then intelligently selects objects from the queue by processing objects with the highest priority first, using a first-in-first-out approach within that priority.



## How do I assign priorities?

When submitting a migration task, you have the option to assign priority levels in the *Schedule* step of the migration wizard, to help control which objects will be processed from the asset task queue first.

## How does first-in-first-out (FIFO) work?

When you submit a new migration task, objects are placed at the end of the asset queue for their assigned priority, meaning that tasks previously submitted with the same priority will be processed first.

As On Demand Migration completes a migration job, it will immediately start processing the next available job by selecting objects from the beginning of the highest priority queue.

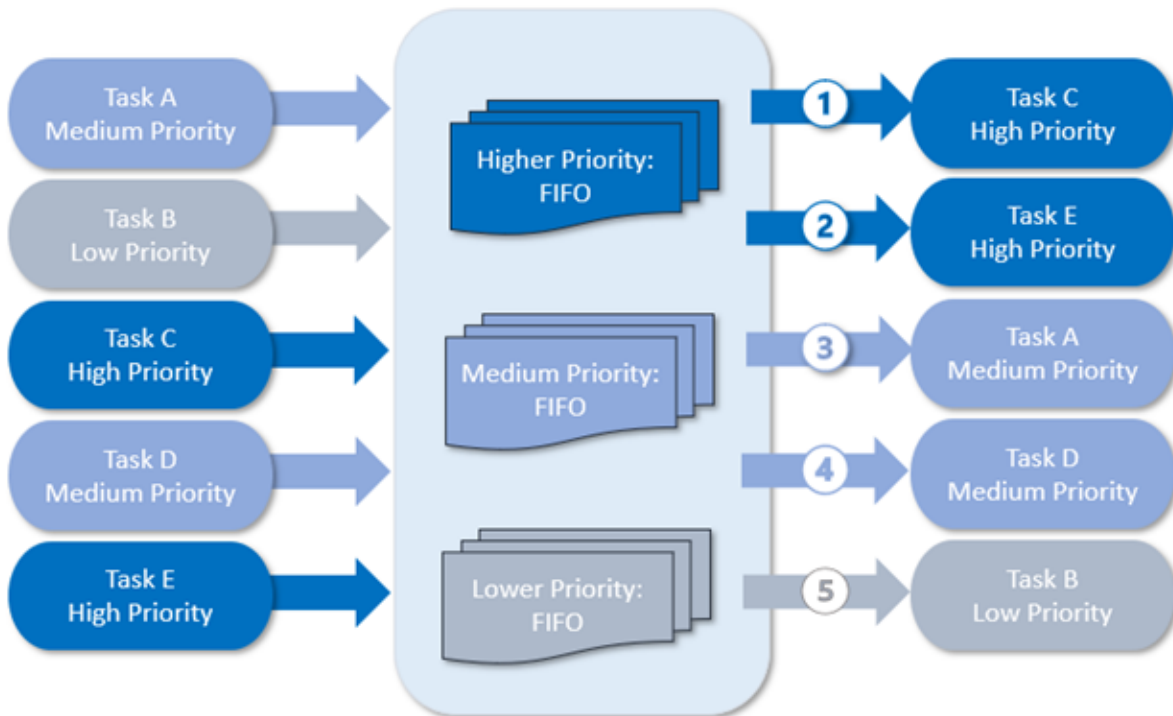
This respects the FIFO approach while still ensuring that higher priority tasks are always processed before those with lower priorities.

## What is an example scenario?

Let's imagine that a migration operator submits five OneDrive migration tasks throughout the day, with a mixture of priorities, in the order of Task A, Task B, Task C, Task D, and Task E.

If there is available capacity to process all the objects when each task is submitted, the migrations states of all tasks will immediately switch to **Migrating** and all five tasks will process concurrently with no queue management required.

However, if the available capacity for OneDrive migrations is at its maximum limit when the tasks are submitted, On Demand Migration will place the objects in the OneDrive queue and then process the tasks in order of priority and FIFO as capacity becomes available.



**i** **NOTE:** Every On Demand Migration project has its own migration queue and does not compete with asset queues in other projects.

#### What determines available capacity?

On Demand Migration uses Microsoft APIs to perform migration tasks and must abide by the API limits that Microsoft enforces in each tenant. These limits are in place to ensure that migration activities do not impact your daily business operations. On Demand Migration operates within the available capacity for your source and target tenants.

#### How do I know which objects are queued?

When you submit a migration task for an asset that is processing at maximum capacity, the newly queued objects will display the migration state **Queued** in the list view and object detail pane.

You can sort and filter the list view by migration state to view all queued objects.

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 Microsoft 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](http://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