

Quest On Demand Migration

## **Update Agent 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.

On Demand Migration Desktop Update Agent

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# About this Guide

On Demand Migration is a Microsoft 365 tenant-to-tenant migration service that allows you to simply and securely migrate Microsoft 365 information from Exchange Online, OneDrive for Business, SharePoint Online, and Microsoft Teams. To complete a migration project, agents are configured and deployed by administrators, and then the agent are run on end users' workstations.

The purpose of this guide is to:

- provide the information administrators require to configure and deploy agents for a migration project.
- provide the steps users must perform to reconfigure their applications and complete the migration process.
- provide a high-level overview of a migration project from the administrators configuration tasks to the users application reconfiguration tasks.

For complete details on setting up a migration project, refer to the [On Demand Migration User Guide](#).

# System requirements

Before you begin a migration project and agent deployment, ensure that your systems meet the following minimum requirements.

## General Requirements

- Client has been licensed for On Demand Migration.
- Access to a Global Administrator account for each Microsoft 365 tenant.
- Disable policies that prevent Outlook Profile, OneDrive for Business, and Microsoft Teams application changes or creation.
- If applicable, users have been provided new or temporary password for the account in the new target destination Microsoft 365 tenant.
- Source and target users have matching attribute values to identify and pair objects together for mailbox and OneDrive content synchronization.

**i** | **TIP:** Try [Password Sync](#) for On Demand Migration Active Directory to keep your migrated hybrid users synchronized so when they are moved, they keep their existing password.

## License Requirements

Before starting a migration, each target user account must be licensed for each application that will be reconfigured using Desktop Update Agent. The following licenses are required:

- Exchange Online if configuring Outlook profiles.
- SharePoint Online if configuring OneDrive for Business application.
- Microsoft Teams if configuring Microsoft Teams application.

**i** | **NOTE:** On Demand Migration can automatically assign these licenses to target user accounts during the email and OneDrive migration process.

## Software Requirements

**i** | **NOTE:** If OneDrive for Business, Microsoft Teams, Outlook, or Office are not installed on the workstation, those applications will be skipped and not impact any other applications present during the reconfiguration.

The minimum version requirements for software installed on user's workstations:

- Outlook 2016 (32-bit or 64-bit) or higher
- OneDrive for Business (Most recent updates recommended)
- Microsoft Teams (Most recent updates recommended)
- Windows 10 (32-bit or 64-bit) or Windows 11
- .NET 4.7.2 or higher
- Microsoft 365 Apps (Office Click-to-Run Version Only)

**i** | **NOTE:** Microsoft Office Professional Plus is not supported for Office license reset.

## Network Requirements

The minimum network requirements to run Desktop Update Agent:

- The On Demand Migration API for the Desktop Update Agent is secured by Azure Active Directory through a Quest tenant. If your network restricts access to Azure Active Directory tenants, ensure that the Quest tenant "quest.com"/91c369b5-1c9e-439c-989c-1867ec606603 is added to the permitted tenant list.
- Internet access using port 443.
- Internet access to download the executable (optional).
- Internet access to connect to Microsoft 365.

- Internet access to On Demand Migration Endpoints. (**NOTE:** Proxies or security applications that intervene in network access may prevent the agent from connecting to On Demand Migration. Check the agent logs for details if this occurs.)
  - Internet access to Exchange Online "Autodiscover" endpoints at:
    - Global: <https://autodiscover-s.outlook.com/autodiscover>  
Optionally, you can use the equivalent '.us' Government Community Cloud (GCC) endpoints, when applicable.
    - US:
      - <https://odmduaproduspublicapi.azurewebsites.net/api/v2.0/GetSwitchAppsOptions>
      - <https://odmduaproduspublicapi.azurewebsites.net/api/v2.0/SetSwitchAppsResults>
    - Europe:
      - <https://odmduaprodeupublicapi.azurewebsites.net/api/v2.0/GetSwitchAppsOptions>
      - <https://odmduaprodeupublicapi.azurewebsites.net/api/v2.0/SetSwitchAppsResults>
    - Canada:
      - <https://odmduaprodcapublicapi.azurewebsites.net/api/v2.0/GetSwitchAppsOptions>
      - <https://odmduaprodcapublicapi.azurewebsites.net/api/v2.0/SetSwitchAppsResults>
    - UK:
      - <https://odmduaprodukpublicapi.azurewebsites.net/api/v2.0/GetSwitchAppsOptions>
      - <https://odmduaprodukpublicapi.azurewebsites.net/api/v2.0/SetSwitchAppsResults>
    - Australia:
      - <https://odmduaprodaupublicapi.azurewebsites.net/api/v2.0/GetSwitchAppsOptions>
      - <https://odmduaprodaupublicapi.azurewebsites.net/api/v2.0/SetSwitchAppsResults>
  - Local access to read/write the following registry keys on the end-user's workstation:
    - Outlook 2010: HKEY\_CURRENT\_USER\Software\Microsoft\Windows NT\CurrentVersion\Windows Messaging Subsystem
    - Outlook 2013: HKEY\_CURRENT\_USER\Software\Microsoft\Office\15.0
    - Outlook 2016: HKEY\_CURRENT\_USER\Software\Microsoft\Office\16.0
    - Outlook 32-bit: HKEY\_LOCAL\_MACHINE\SOFTWARE\Wow6432Node\Microsoft\Office
    - Outlook 64-bit: HKEY\_LOCAL\_MACHINE\SOFTWARE\Microsoft\Office

**i** **NOTE:** During this process, the Outlook Profile will be copied to a new Profile directed to the target account. Due to this configuration, a new OST download will occur based on each user's current cache settings, if enabled. To avoid network congestion try disabling or curtailing the cache settings to a lower amount of data then slowly increase it as needed. This can be accomplished through policies.

## Supported Authentication

On Demand Migration Desktop Update Agent supports environments that use:

- Active Directory Federation Services (AD FS)
- Single Sign On (SSO) with mixed authentication modes, such as:
  - Modern Authentication (ADAL)
  - Forms Authentication
  - Windows Integrated Authentication



# Working with On Demand Migration Desktop Update Agent (DUA)

Desktop Update Agent provides the following agent deployment capabilities:

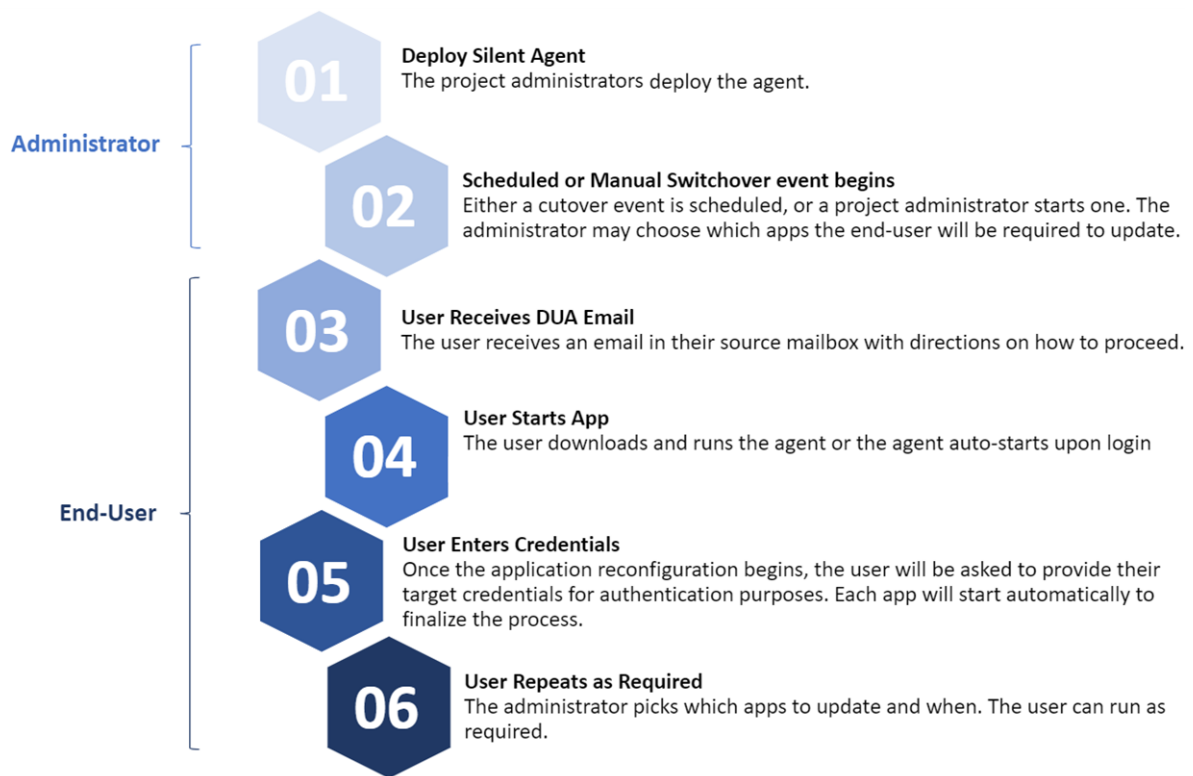
- Ability to manage users' application reconfiguration activities from a single view within On Demand Migration. Migration administrators can configure which applications will be reconfigured, track each application's status, and send notices to remind users if required.
- Support for OneDrive for Business and Microsoft Teams.
- Support for Microsoft 365 Apps license reset.
- Support for various client authentication mechanisms.
- Support for Outlook Profile reconfiguration.

## Workflow

The workflow required to run a desktop application migration includes both administrators and users:

- From On Demand Migration, the migration administrator configures and deploys the agent as part of setting up a migration project. For details on agent deployment and configuration options, see [Deploying Agents](#) and [Configuring the Switch Application Task](#).
- From a user's workstation, Desktop Update Agent runs to reconfigure applications and complete the migration process. For details, see [Running Desktop Update Agent](#).

The diagram below describes each of the steps to complete the migration project and application reconfiguration:



## Deploying Agents

To complete a migration project and reconfigure a user's applications, agents must be configured and deployed by administrators, then run on users' workstations.

To deploy Desktop Update Agent to users' workstations, you need to:

- Download the agent. (On Demand Migration Desktop Update Agent Installer MSI)
- Generate an access token to be used by the agent.
- Share the installation through a Group Policy Object.

**i** **NOTE:** You can also install the agent using a command line script. See the FAQ section of the Desktop Update Agent Release Notes.

**i** **NOTE:** Desktop Update Agent can be downloaded either during the configuration of the Switch Application task or prior to the configuration.

### ***To download the agent and generate the required token:***

1. On the On Demand Migration Project page, click **Desktop Agent**.
2. Click the **Download Agent** button.



7. Select the **Sharing** tab, and select **Share**.
8. Select the required users.

**i** | **NOTE:**

- Ensure the users have Read access.

9. Choose **Share**.
10. Choose **Done**.
11. Select the **Security** tab and ensure Authenticated Users security group has the Read and NTFS permissions.
12. From the Start menu, go to **Administrative Tools** and choose **Group Policy Management**.
13. Right-click the domain or OU you are migrating and choose **Create a GPO in this domain**, and link it here.
14. In the New GPO dialog, enter a name for the GPO and choose **OK**.
15. Select the new GPO and choose **OK**.
16. Right-click the GPO and select **Edit**.
17. Open **Computer Configuration | Policies | Software Settings**, right-click **Software Installation**, go to **New**, and choose **Package**.
18. In the File Name field, enter the UNC path to the On Demand Migration Desktop Update Agent Installer MSI file and choose **Open**.
19. Select the **On Demand Migration Desktop Setup Agent** and choose **Open**.
20. In the Deploy Software dialog, select **Advanced** as the deployment method, and select **OK**.
21. Under the **Modifications** tab, add the previously created MST file, and click **OK**.
22. Restart the computer for the applied group policy to complete the agent installation.

***To configure Desktop Update Agent to run at User Logon using a Group Policy Object:***

1. From the Start menu, go to **Administrative Tools** and choose **Group Policy Management**.
2. Right-click the domain or OU you are migrating and choose **Create a GPO in this domain**, and link it here.
3. In the New GPO dialog, enter a name for the GPO and choose **OK**.
4. Select the new GPO and choose **OK**.
5. Right-click the GPO and select **Edit**.
6. Open **Computer Configuration | Policies | Administrative Template | System | Logon**, and right select **Run these programs at user logon**, and select **Edit**.
7. Select **Enabled | Show** and enter the applications you want to run when a user logs in, select **OK**, then **OK** again. You must use the full path to the application.
8. Restart the computer for the applied group policy to complete the installation.  
On Demand Migration Desktop Update Agent will now open automatically when the user logs in.

# Configuring the Switch Application Task

Which applications are configured by Desktop Update Agent is managed through On Demand Migration's switch application.



## NOTE:

- Each application can have its own separate switch application task.
- Each application reconfiguration status is tracked separately for reporting purposes.

### ***To configure the switch application task to start the reconfiguration job:***

1. Log in to On Demand.
2. Navigate to **Migration** and select the required project.
3. Select the **Desktop Agent** tab.
4. Select a user with a successful mail and OneDrive migration.
5. Choose **Switch Application**.
6. Under **Agent Setup**, select the **Modern Agent** and click **Next**. If required, you can select to use 'legacy' 1.x agents, but you will not have access to new features.
7. Under **App Update Scope**, select the applications to update and select **Next**.
  - Ensure Microsoft 365 Office Activation, Outlook Application, Migrate Signature, OneDrive Application and Teams Applications are selected.
8. Under **Validation**, you can choose to **Skip mailbox state validation** and **Skip OneDrive state validation** if needed.
9. Under **Notifications**, select to send the email notification (with the required authentication steps for users) to the source or the new target, and select **Next**.
10. Administrators have the flexibility to decide when they want users to reconfigure their desktop applications. Under **Schedule**, select when you want the switch application to run, and select **Next**.
11. Review the Switch Applications Task settings and select **Finish**.

Once the Switch Applications task is completed, On Demand Migration reports each application reconfiguration status as "Waiting". This means that the task is pending the user running the Desktop Update Agent. For a complete list of possible states, see [Monitoring the Switch Application Status](#).

# Monitoring the Switch Application Status

Administrators can monitor each user's application reconfiguration status through the On Demand Migration dashboard.

SWITCH APPLICATIONS		RE-SEND NOTIFICATION		MARK AS COMPLETE		REMOVE FROM COLLECTION		EXPORT	
Source UPN	Target UPN	Agent Type	Office Activati...	Mailbox Status	Outlook App	OneDrive Stat...	OneDrive App	Teams App	
<input checked="" type="checkbox"/>	MCSCloudDUA...	MCSCloudDUA...	Silent	Waiting	Completed	Waiting	Completed	Waiting	Waiting
<input type="checkbox"/>	MCSCloudDUA...	MCSCloudDUA...	-	-	New	-	New	-	-

The possible status states include:

- Empty "-": There is no reconfiguration task assigned to the user.
- Waiting: Reconfiguration tasks have been submitted, waiting for the user to complete the configuration.
- Skipped: User chose to skip the reconfiguration by closing the agent.
- Complete: Reconfiguration has completed.
- Error: An error has occurred during the reconfiguration. Errors are logged and send back to On Demand Migration.

## Running Desktop Update Agent

This section describes the process followed by users to run Desktop Update Agent to reconfigure their applications.

### **i** NOTE:

- The applications to be reconfigured by Desktop Update Agent are set by the migration administrator as part of the migration project.
- After each application has been reconfigured, users may be prompted to enter Microsoft 365 account passwords and select **Allow my organization to manage my device** or **No sign in to this app only**.
- To reconfigure Microsoft 365 App License and Microsoft Teams, command prompt script processing must be enabled.
- Microsoft 365 App License and Microsoft Teams configurations will be skipped if the computer is configured for "Shared Computer Licensing".
- For Microsoft 365 App License reconfigurations: On some versions of Windows, Managed Device options (such as Azure Joined, Hybrid Azure Joined, or workplace joined) are not supported. This is a Microsoft limitation.
- For Teams reconfigurations: For Managed Device options (such as Azure Joined, Hybrid Azure Joined, or workplace joined), the Teams step may report success, but users may still be signed in to source. This is a Microsoft limitation.

### **To run the Desktop Update Agent:**

1. From the **Start** menu, expand the **Quest** folder, and click the **On Demand Migration Desktop Update Agent**.

2. On the Configure Desktop Application dialog, select the Profile to migrate (if more than one eligible profile is present) and click **Start**.

- a. If Outlook has been migrated, users are prompted to close Microsoft Outlook if it is currently running. The agent starts the reconfiguration and opens Outlook after target account profile is created and click **Next** to reconfigure Microsoft 365 App License Reset.

**NOTE:** If OneDrive is also being processed, Outlook will not be opened until the Desktop Update Agent has completed all steps.

- b. If applicable, close any opened Office application and restart it to complete the license activation and click **Next** to reconfigure the next application.

The computer may have to be restarted to allow the OneDrive folder to be renamed. Once restarted, the agent will open again to process any remaining steps. If this is required, you can select to either restart the computer immediately or have the rename triggered on the next restart.

- c. If OneDrive has been migrated, the agent opens the OneDrive client once it has been reconfigured and click **Next** to reconfigure the next application.
  - To add a new target and retain OneDrive file locations when reconfiguring a OneDrive application, enable the **Add new target OneDrive account perserving existing local folders and disconnect the source account** option.
  - To simply add a new target OneDrive file location enable the **Add new target OneDrive account and local folders (requires downloading)** option. After successful authentication with Microsoft 365 tenant, OneDrive prompts users to configure the target tenant OneDrive account and provide a local folder where the OneDrive content will be synchronized.  
Note: The source OneDrive account is not removed by the agent.
- d. If Teams has been migrated, users are prompted to exit and quit Teams. The agent reconfigures the Teams client with the target account and opens it after the process completes.

3. If required, click the gear icon and select **Logs** to review the updates.

## Validating application reconfiguration

Once Desktop Update Agent has been run, users can verify that applications have been reconfigured properly.

### To validate application reconfiguration results from On Demand Migration project page:

1. From the On Demand Migration Project Page under **Desktop Update Agent**, user's application configuration status should all shown as **Completed**.
2. Click the **Device Link** in the user detail panel to review the device history information and application configuration status.

Name	Source U...	Target UPN	Agent Type	Devices	Mailbox ...	Office Actr...	Mailbox Stat...	Outlook App	OneDrive St...	OneDrive App
Demo2DUA1	Demo2DUA1...	Demo2DUA1@demo...	Silent	1	Source	Completed	Completed	Completed	Completed	Completed
Demo2DUA2	Demo2DUA2...	Demo2DUA2@demo...	-	-	-	-	Completed	-	Completed	-
Demo2DUA3	Demo2DUA3...	Demo2DUA3@demo...	-	-	-	-	Completed	-	Completed	-
Demo2DUA4	Demo2DUA4...	Demo2DUA4@demo...	-	-	-	-	Completed	-	Completed	-
Demo2DUA5	Demo2DUA5...	Demo2DUA5@demo...	-	-	-	-	Completed	-	Completed	-

Device	Age...	Last Run	Office	Outlook	OneDrive	Teams
Lab1-W10	2.0.0.58	Today at 1:39 ...	Completed	Completed	Completed	Completed

[Close](#)

**To validate application reconfiguration on workstations:**

1. Open Outlook. Users may be prompted to enter their Microsoft 365 account password and also asked to **Allow my organization to manage my device** or **No, sign in to this app only**.
2. Sign in with the target Microsoft 365 account. Click **Sign in**.
3. Enter user target account email address and click **Next**.
4. Accept the Microsoft license agreement.
5. Choose **File | Office Account in Outlook**. Review the license information and confirm that the Microsoft 365 App license has been reconfigured to the target account.
6. Open Teams and validate that the user is signed into the target tenant.
7. Open OneDrive and validate that the target OneDrive account has been added.
  - For OneDrive applications, if the **“Add new target OneDrive account preserving existing local folders and disconnect the source account”** option was selected, verify that the OneDrive local folders and version history information are preserved.



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## Appendix: Quick Start Guide

The following section outlines the steps required to set up a migration project in On Demand Migration, configure and deploy the required agent, and reconfigure a user's applications using Desktop Update Agent.

**i** | **NOTE:** For complete details on setting up a migration project, refer to the [On Demand Migration User Guide](#).

- [Step 1: Administrator prepares for the migration](#)
- [Step 2: Administrator connects to the tenant](#)
- [Step 3: Administrator configures the migration project](#)
- [Step 4: Administrator migrates user mailbox and OneDrive content](#)
- [Step 5: Administrator deploys the agent](#)
- [Step 6: Administrator configures the Switch Application task](#)
- [Step 7: User runs Desktop Update Agent](#)
- [Step 8: User verifies that the applications have been reconfigured](#)

### Step 1: Administrator prepares for the migration

Before starting a migration project, ensure that the minimum requirements are met. See [System requirements](#) for details.

### Step 2: Administrator connects to the tenant

A migration project begins by adding a Microsoft 365 tenant and granting the required consent using On Demand Migration. For complete details on setting up a migration project, refer to the [On Demand Global Settings User Guide](#).

**i** | **NOTE:** To add the tenant and create a migration project, a Microsoft 365 Global Administrator is required for each tenant.

### ***To add a Microsoft 365 tenant***

Follow these steps to add Microsoft 365 tenants for On Demand Migration. If there is an existing tenant from another project, it can be reused.

1. Log in to On Demand using the credentials you used to sign up for On Demand.
2. In the navigation panel on the left, click **Tenants**.
3. Click **Add Tenant**.
4. If you are in any region other than the U.S region, such as Europe, United Kingdom, Canada, or Australia, you are immediately redirected to the Microsoft login page.
5. If you are in the U.S. region, you must select the type of tenant that you are adding. Select **Add Commercial or GCC Tenant** or select **Add GCC High Tenant**.
6. Enter the Azure AD Global Administrator credentials for the source tenant and click **Next**.
7. Log in to Microsoft 365.
8. Accept the requested Application Permissions and choose **Finish**.
9. Repeat steps 2 – 8 for the target tenant.

### ***To grant permission consent:***

Follow these steps to grant the additional application consents needed to migrate mailboxes and OneDrives.

1. Log in to On Demand using the credentials you used to sign up for On Demand.
2. In the navigation panel, click **Tenants**.
3. Select the **Edit Consents** link for the source tenant.
4. Ensure the following permissions are granted under Migration: Basic, Mailbox Migrations, Resource Processing for SharePoint Online, and Teams.
5. Ensure you have the Global Administrator credentials for the tenant and choose the **Grant Consent or Regrant Consent** link to grant the consent.
6. Log in to Microsoft 365.
7. Accept the requested Application Permissions.
8. Choose **Finish**.
9. Repeat steps 2 – 8 for the target tenant.

## **Step 3: Administrator configures the migration project**

For complete details on setting up a migration project, refer to the [On Demand Migration User Guide](#).

### ***To configure the migration project:***

1. Log in to On Demand.
2. Navigate to **Migration**.
3. Choose **New Project**.

4. Select the source and target tenants and add a project description if needed, choose **Save**.
5. Select the **Configure connections** link from the project dashboard once the project is loaded.
6. Select the **Source** connection and enter the source tenant Global Administrator account credential and choose **Save**.
7. Select the **Target** connection and enter the source tenant Global Administrator account credential and choose **Save**.
8. Choose **Finish** to close the Configure Connection window.
9. Select the **Accounts** tab and then choose **Discover Accounts**.
10. Step through the Discovery Account wizard and start the tenant discovery.

## Step 4: Administrator migrates user mailbox and OneDrive content

At least one full successful synchronization must occur for both the user's mailbox and OneDrive before the Desktop Update Agent application reconfiguration may begin. Quest recommends that Teams data is also migrated before running that option within the switch task.

### *To migrate mailbox and OneDrive for Business content:*

1. Log in to On Demand.
2. Navigate to **Migration** and select the project previously created.
3. Choose the **Accounts** tab.
4. Select the source user you have prepared and choose **Match**.
5. Select the matching attribute for the source and target account. Choose **Next** and then **Finish** to start the matching process.
6. Once the source user account has been matched with the target account, select the **Mailboxes** tab.
7. Select the matched source user mailbox and choose **Migrate Mail**.
8. In the New Mail Migration Task, you can configure additional migration parameters for your Mail Migration including assigning a license plan for your target mailbox. For the purpose of this guide, complete the wizard using the default option and choose **Finish** to start the mail migration.
9. Once the mail migration is completed, navigate to the **OneDrive** tab.
10. Select the matched source user and choose **Migrate OneDrive**.
11. In the New OneDrive Migration Task window, you can configure additional migration parameters for your OneDrive migration. For the purpose of this guide, complete the wizard using the default option and choose **Finish** to start the OneDrive migration.

Once the OneDrive migration is complete, the user account is ready to cut over to the target tenant and to reconfigure the applications.

## Step 5: Administrator deploys the agent

Administrators deploy Desktop Update Agent on users' workstation. For details see, [Deploying Agents](#).

## Step 6: Administrator configures the Switch Application task

Configuring the Switch Application task is required to set which applications are configured by Desktop Update Agent. For details, see [Configuring the Switch Application Task](#).

## Step 7: User runs Desktop Update Agent

Users run Desktop Update Agent to reconfigure the applications on their workstation. For details, see [Running Desktop Update Agent](#).

## Step 8: User verifies that the applications have been reconfigured

User validates that their applications have been reconfigured properly. For details, see [Validating application reconfiguration](#).

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## 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