



Quest[®] On Demand Migration Self-Service
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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Introduction

Device migration between two Active Directory or Microsoft Entra ID tenants can be complex because Active Directory and Entra ID do not natively support directly moving a device from one tenant to another. Device migration between tenants usually involves re-enrolling devices from a source tenant to a target Tenant which may be needed during:

- Mergers and acquisitions
- Tenant consolidation or divestitures
- Rebranding or organizational changes

On Demand Migration Self-Service (ODMSS) is a powerful and easy to use service that helps end users schedule and manage their own asset migrations. This feature is optional and requires the Migration Administrators to configure the service.

ODMSS Device Migration enables end users to schedule their own device migrations between source and target tenants that use the same directory systems like Active Directory and EntraID, or hybrids where one is an on-premise and the other is a cloud tenant.



NOTE: The acronym **AD** used in the document refers to both Active Directory and Microsoft Entra ID.

The acronym **ODMAD** when used by itself in this document refers to the On Demand Migration Active Directory portal that you can access when you log in to On Demand and go to **Migrate > Active Directory**.

The terms workstations and devices are used interchangeably in this document.

Before You Begin

You Quest Sales Team has already explained the services and features available to you. The following topics are a ready reference about important concepts in Quest On Demand.

- [Signing up for Quest On Demand](#)
- [Organizations and Regions](#)
- [Tenants](#)



IMPORTANT:

There is no license requirement for this service. It is available for free to all customer who have an Azure T5/T7 subscription or Active Directory License.

There are no additional consents required for the source or target tenants. All the necessary consents are derived from ODMAD with the existing permissions.

Migration Steps at a glance

- Planning
 - Audit current devices in the source tenant.
 - Decide which devices need migration.
 - Inform users about reauthentication, profile changes, and data backup.
- Device Preparation
 - Backup data.
 - Reset device (optional but cleanest approach).
 - Discover your workstations or devices through the ODMAD portal.
- Migration with ODMAD Self Service
 - Review discovered workstations and migration eligibility.
 - Set up a migration schedule or migrate immediately.
 - Monitor the migration.
 - Inform users about the migration.

Signing in to Quest On Demand

To get access to On Demand Migration Self-Service, 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**.



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.

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.

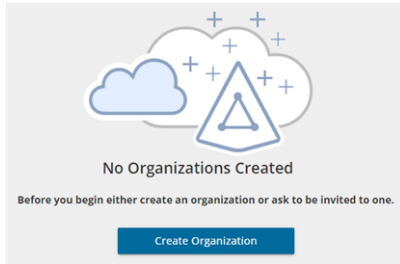
For more information about managing your organization see [Managing organizations and regions](#) in the *On Demand Global Settings User Guide*.

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 the 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**.

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:

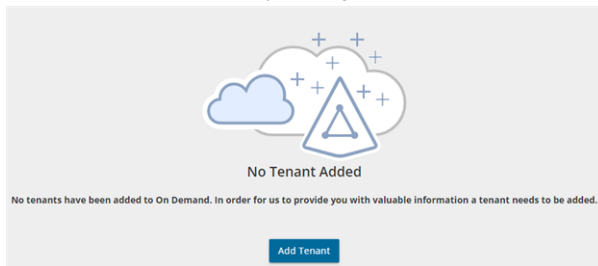
- **Commercial or GCC Tenant** - choose this option if you want to add either a Microsoft 365 commercial tenant hosted on the Azure public cloud or a Microsoft 365 GCC (Government Community Cloud) tenant with moderate cyber-security and compliance standards hosted on the Azure Government cloud. For more 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. Close this page since no new consents are required for On Demand Migration Self-Service. All the necessary consents are from ODMAD with the existing permission.

Self Service Migration Workspace

In this topic:

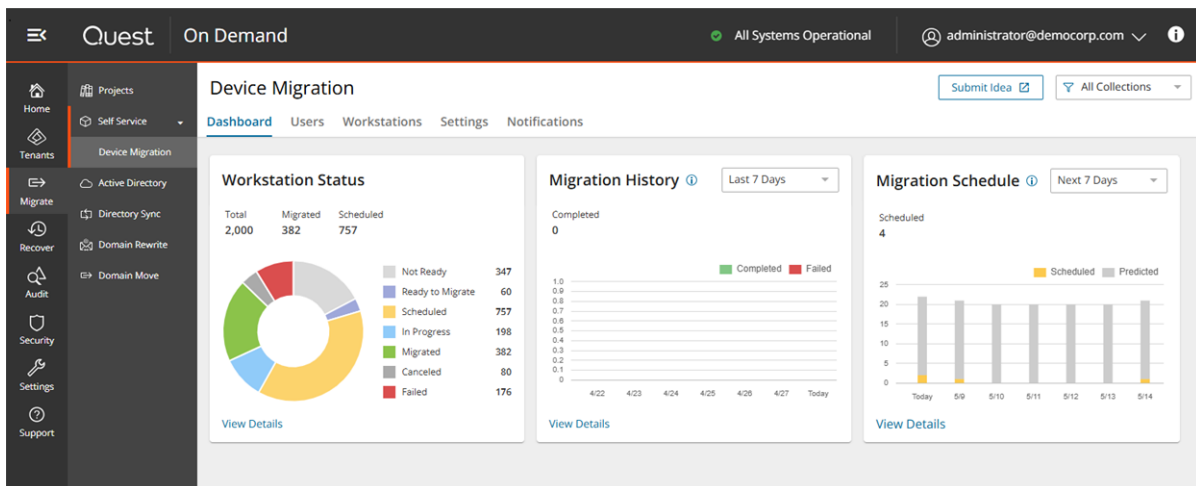
- [Dashboard](#)
- [Users](#)
- [Workstations](#)
- [Settings](#)
- [Notifications](#)
- [Working with Lists](#)
- [Searching](#)

Dashboard

The **Dashboard** displays key information and metrics about device migration. It provides a centralized overview of important data to help users monitor progress, manage migration schedules, and make informed decisions.

To open the Dashboard, follow the steps below:

1. Login to Quest and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migrate > Self Service > Device Migration**.



The components of the Dashboard are described below:

Notification panel - presents relevant information and shortcuts to migration activities. Appears only when a system notification is available.

Dashboard tiles

- **Workstations Status** - presents a summary of the migration status of various devices in the source tenant. Click **View Details** to open the **Workstations** tab for more information about workstations. The status values are as follows:
 - **Total** - number of workstations discovered in the source AD.
 - **Not Ready** - number of devices that are configured in the source tenant but are not ready to be migrated. Additional preparation is required.
 - **Ready to Migrate** - number of devices in the source tenant are configured and ready for migration. A workstation or device is in this state when all of the following conditions are true:
 - Device is registered in ODMAD.
 - Device is assigned to a Self-Service Profile in ODMAD.
 - Device is ReACLED in ODMAD.
 - **Scheduled** - number of devices that are scheduled for migration.
 - **In Progress** - number of devices that are being migrated.
 - **Migrated** - number of devices that have been successfully migrated.
 - **Canceled** - number of devices that were manually stopped from being migrated.
 - **Failed** - number of devices that could not be migrated.
- **Migration History** - presents a summary of the migration status of various devices in the source tenant filtered by date ranges: *Last 24 Hours*, *Last 7 Days*, and *Last 14 Days*. Click **View Details** to open the **Workstation** tab for more information about workstations filtered by the applied date range. This summary also indicates the following metrics
 - **Completed** - number of devices that have been successfully migrated.
 - **Bar chart** - graphical color-coded indicator of the number of devices that were migrated successfully (Completed) and the number of devices that could not be migrated (Failed).
- **Migration Schedule** - presents a summary of the migration schedules of various devices in the source tenant filtered by **Status** = *Scheduled* and date ranges: *Last 24 Hours*, *Last 7 Days*, and *Last 14 Days*. Click **View Details** to open the **Workstation** tab for more information about workstations that are scheduled within the selected date range.

Users

The Users tab helps you to notify users, set up migration schedules and migrate devices that are listed and categorized by linked user profiles. See [Users](#) for more details.

Workstations

The Workstations tab helps you to setup migration schedules, migrate devices, and notify users. See [Workstations](#) for more details.

Settings

The Settings tab helps you configure the schedule, schedule limits, and user email used for notifications. See [Settings](#) for more details.

Notifications

The Notifications tab lets you setup the templates that administrators and end-users can use to send notifications to intended recipients. See [Notifications](#) for more details.

Working with Lists

Details of users, workstations, their migration states and other pertinent details are displayed in lists.

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.

<input checked="" type="checkbox"/>		Conf Room Crystal	Room Mailbox	Room Mailbox	Not required	Matc...	Crystal@M365x37...	Crystal@M365x11...
<input checked="" type="checkbox"/>		Conf Room Hood	Room Mailbox	Room Mailbox	Not required	Matc...	Hood@M365x376...	Hood@M365x118...

1-25 of 81 Results

Show 25 < 1 / 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 the following fields: User, User Email Address, Workstation.
3. Click the **X** icon in the filter box to clear the search criteria.

i **TIP:** User email address can be searched with the "contains" operator but the others are only searchable with "starts with"

Users

In this topic:

- [About Users](#)
- [Managing Self-Migration](#)
- [Uploading User Emails](#)
- [Sending Notifications](#)
- [Migrating Workstations manually](#)
- [Removing a Scheduled Migration](#)

About Users

The Users tab has the following components:

Info panel

- **Summary** - this section presents a summary of users with the following metrics:
 - **Total Users** - total number of user profiles discovered.
 - **With 1 Workstation** - number of user profiles that are linked to only one workstation.
 - **With Multiple Workstations** - number of user profiles that are linked to one or more workstations.
- **Migration Status by Users** - number of workstations in categorized by its migration status. See the **Status** column description in the List View below for descriptions about each migration status.

List View

Displays a tabular information about workstations discovered in the source AD categorized by linked users. If you are an end user and not an administrator, you will see only the workstations linked to your user profile. Use the **Edit Columns** to show or hide columns in the list. The columns are as described below:

- **User** - username discovered in the source AD.
- **User Email** - UPN of the user.
- **Last Login** - the most recent date and time when the user logged into the device.
- **Last Notified** - date and time when the most recent notification about this device was sent.
- **Workstation** - name of the device discovered in the source AD.
- **Status** - indicates the migration status of each device. The status values are described below:
 - **Not Ready** - device is configured in the source tenant but are not ready to be migrated. Additional preparation is required.
 - **Ready to Migrate** - devices in the source tenant are configured and ready for migration. A device is considered ready for migration when the following criteria are met:
 - Device is registered in ODMAD.
 - Device is assigned to a Self-Service Profile in ODMAD.
 - Device ACL permissions are updated (ReACLeD) in ODMAD.
 - **Scheduled** - device is scheduled for migration.
 - **In Progress** - device is being migrated.
 - **Migrated** - device has been successfully migrated.
 - **Canceled** - device was manually stopped from being migrated, or the device was removed from a migration schedule.
 - **Failed** - device could not be migrated.
- **Self-Migration** - indicates whether or not self-service is enabled for the end user. If it indicates that it is enabled, the end user can schedule a migration from the self-service portal.
- **Scheduled Time** - date and time when the device migration is scheduled.
- **Migrated Time** - date and time when the device migration was successfully completed.
- **Target State** - indicates whether or not the user has been granted access to the target tenant. Valid values are *Enabled* or *Disabled*.
- **Target UPN** - the UPN of the user in the target tenant.
- **Last Password Changed** - date and time when the password of the user was most recently changed in the target tenant.

User Detail Panel

Displays more information about the selected user as described below:

- **Title** - name of the selected user.
- **As of Date** - date when the linked user was discovered.

- **User Details** - specific information about the user.
 - **Name** - name of the linked user.
 - **Email** - email address of the linked user.
 - **Last Login** - the most recent date and time the user logged into the device.
- **Linked Workstations** - list of workstations linked to the user. The total number of workstations is also indicated.
 - **Name** - name of the workstation.
 - **Status** - indicates the migration status of each workstation.
 - **Last Login** - the most recent date and time the user logged into the device.
 - **Scheduled Time** - date and time when the device migration is scheduled.
- **Notification History** - list of notification emails that were sent by an administrator or the end user.
 - **Template Name** - name of the email template that was used to send the notification.
 - **Sent Date** - date and time the notification was sent.

Managing Self-Migration


1. Click **Manage Self-Migration** from the Actions Menu. The *Manage Self-Migration* panel opens.
2. Review and update the configuration setting in this panel as described below:
 - **Self-Migration** - select one of the following options described below:
 - **Enabled** - the device can be migrated by a linked user.
 - **Disabled** - the device can be migrated only by the administrator.
 - **Schedule Migration** - set a schedule time slot. See Scheduling in the Settings topic for more details. When you set the schedule and save the settings, the Scheduled Time column for the selected workstation in the List View will display the date and time. The **Status** column value will change to *Scheduled*.

Uploading User Emails

This is a two step process to provide email addresses to use for notifications.

Prepare the CSV file

1. Click **Upload User Emails**. The *Upload User Emails* panel opens.
2. Click **Download Example**. The CSV template is downloaded to you default folder.
3. Specify the UPN and email addresses of the recipients as shown in template. Save the CSV file. You may rename the file if needed.

 **NOTE:** Only users linked to workstations should be added to the CSV. Users without workstations will not be uploaded. CSV file names with non-ASCII characters are not supported.

Upload the CSV file

1. Click **Upload User Emails**. The *Upload User Emails* panel opens.
2. Click **Browse** and select the CSV that contains the recipient details. The file is attached to the panel.
3. Click **Upload**. Users that are successfully uploaded will appear in the Users list view.

Sending Notifications

This action lets you send a notification at any time to selected users.

1. Select one or more user profiles if you are an administrator, or select your use profile if you are an end user.
2. Click **Send Notifications**. The *Send Notification* panel opens.
3. Configure the options as described below:
 - **Template** - choose a notification template.
 - **Send To** - select from one of the following recipient options:
 - **All users on workstation** - all users whose profiles are associated to the selected workstation will receive the notification
 - **Last Logged in user** - only the user who most recently logged into the selected workstation will receive a notification.

Migrating Workstations manually

This action is available to administrators only unless this action is granted to end users from the *Settings* tab. Workstations can be migrated manually without any scheduling.



NOTE:

- The workstation migration process will start immediately and cannot be canceled once submitted.
 - The migration job will start in about 15 minutes.
 - The linked workstation will automatically reboot.
 - Migration time varies (usually 15 to 30 minutes) based on connection and data size.
1. Select one or more user profiles if you are an administrator, or select your user profile if you are an end user. Workstations that are not ready will not be submitted for migration.
 2. Click **Migrate Now**. The *Migrate Now* panel opens.
 3. Review the workstations listed in the two sections:
 - **Eligible Workstations** - lists the workstations or devices that meet the following criteria: *Self-Service* is **Enabled** and *Status* is **Ready to Migrate**.
 - **Non-Eligible Workstations** - lists the workstations or devices that do not comply with the eligibility criteria described.
 4. Click **Start Migration**.

Removing a Scheduled Migration

1. Select one or more user profiles if you are an administrator, or select your use profile if you are an end user.
2. Click **Remove from Schedule**. The Remove from Schedule panel opens.
3. Configure the options as described below:
 - **Send Notification** - select this checkbox if you want to send a notification about the cancellation
 - **Template** - choose a notification template.

- **Send To** - select from one of the following recipient options:
 - **All user on workstation** - all users whose profiles are associated to the selected workstation will receive the notification
 - **Last Logged in user** - only the user who most recently logged into the selected workstation will receive a notification.

4. Click **Confirm**. The **Status** column value for the selected workstation will change to *Canceled*.

Workstations

In this topic:

- [About Workstations](#)
- [Managing Self-Migration](#)
- [Sending Notifications](#)
- [Migrating Workstations manually](#)
- [Removing a Scheduled Migration](#)

About Workstations

The screenshot shows the 'Device Migration' interface with the 'Workstations' tab selected. It includes a summary section and a table of workstation migration details.

Summary

Total Workstations	With 1 User Profile	With Multiple User Profiles	Not Ready	Ready to Migrate	Scheduled	In Progress	Migrated	Canceled	Failed
2,000	985	1,015	347	60	758	198	382	80	175

Migration Status by Workstations

Workstation	Status	Self-Migration	Last Login	Scheduled Time	Migrated Time	Collection	Last Notified	Last Discovered	Events
PC696D105	Scheduled	Enabled	11/21/2024 11:23 ...	Today at 8:00 PM			01/30/2025 7:48 ...	11/25/2024 11:15 ...	🔗
PC696D105	Not Ready	Enabled	11/16/2024 10:21 ...			SimClient696MW3	02/11/2025 1:37 P...	11/25/2024 10:25 ...	🔗
PC696D1005	Scheduled	Enabled	11/24/2024 12:19 ...	01/30/2025 12:21 ...	11/24/2024 11:25 ...	SimClient696MW5	01/30/2025 7:48 ...	11/16/2024 7:42 ...	🔗
PC696D10005	Migrated	Enabled	11/26/2024 3:20 ...	11/12/2024 5:42 P...	11/12/2024 6:13 P...	SimClient696MW3	04/18/2025 11:09 ...	11/24/2024 5:48 ...	🔗
PC696D10015	Failed	Enabled	11/23/2024 10:22 ...					11/19/2024 4:02 P...	🔗
PC696D10025	Scheduled	Enabled	11/19/2024 1:58 ...	01/30/2025 3:09 ...		SimClient696MW1		11/16/2024 7:23 ...	🔗
PC696D10035	Scheduled	Enabled	11/25/2024 5:45 P...	01/30/2025 12:23 ...	11/13/2024 10:15 ...	SimClient696MW3	04/18/2025 11:09 ...	11/13/2024 12:43 ...	🔗
PC696D10045	Scheduled	Enabled	11/25/2024 10:58 ...	01/30/2025 3:09 ...		SimClient696MW4	04/18/2025 11:09 ...	11/17/2024 4:42 P...	🔗
PC696D10055	Scheduled	Enabled	11/16/2024 10:34 ...	01/30/2025 12:24 ...		SimClient696MW3	11/05/2024 5:20 ...	11/22/2024 8:07 P...	🔗
PC696D10065	Migrated	Enabled	11/23/2024 8:26 P...	11/18/2024 12:10 ...	11/18/2024 1:07 P...		04/18/2025 11:09 ...	11/15/2024 12:00 ...	🔗
PC696D10075	Not Ready	Enabled	11/22/2024 6:19 P...			SimClient696MW1	04/18/2025 11:09 ...	11/19/2024 1:26 ...	🔗

The Workstations tab has the following components:

Info panel

- **Summary** - this section presents a summary of discovered workstations with the following metrics:
 - **Total workstations** - total number of workstations discovered.
 - **With 1 User Profile** - number of workstations that are linked to only one user profile.

- **With Multiple User Profiles** - number of workstations that are linked to one or more user profiles.
- **Migration Status by Workstations** - number of workstations categorized by its migration status. See the **Status** column description in the List View below for descriptions about each migration status.

Actions Menu

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. 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.

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.

- **Status** - filters the list by migration status. See the **Status** column description in the List View below for descriptions about each migration status.
- **Self-Migration** - filters the list by whether or not self-service is enabled for the end user. Valid values are *Enabled* and *Disabled*.
- **Scheduled Time** - filters the list by predefined date ranges when the device migration is scheduled. Valid values are *All Scheduled*, *Next 24 Hours*, *Next 7 Days*, *Next 14 Days*, *Not Scheduled*.
- **Migrated Time** - filters the list by predefined date ranges when the device migration is was completed successfully. Valid values are *All Migrated*, *Last 24 Hours*, *Last 7 Days*, *Last 14 Days*.
- **Last Notified** - filters the list by whether or not a notification about this device was sent. Valid values are *Notified* and *Not Notified*.

Manage Self-Migration

This action allows a workstation user who has access to On Demand Migration Self-Service to perform a workstation migration if Self-Migration is enabled for the user. See [Managing Self- Migration](#) for more details.

Send Notification

This action allows lets you sens a notification to workstation users at any time. See [Sending Notifications](#) for more details.

Migrate Now

This action lets administrators migrate one or more workstations immediately. See [Migrating Workstations manually](#) for more details.

Export

Lets you export the data in the list view as a CSV file as described below:

1. Click **More > Export**. A background task is run to collect and collate the data for export.
2. When the export file is ready, a message appears in the Notification panel.
3. Click **Download**. The CSV file is saved to your default download folder.

List View

Displays a tabular information about workstations discovered in the source AD. Use the **Edit Columns** to show or hide columns in the list. The columns are as described below:

- **Workstation** - name of the device discovered in the source AD.
- **Status** - indicates the migration status of each workstation. The status values are described below:
 - **Not Ready** - device is configured in the source tenant but are not ready to be migrated. Additional preparation is required.
 - **Ready to Migrate** - devices in the source tenant are configured and ready for migration. A device is considered ready for migration when the following criteria are met:
 - Device is registered in ODMAD.
 - Device is assigned to a Self-Service Profile in ODMAD.
 - Device ACL permissions are updated (ReACLeD) in ODMAD.
 - **Scheduled** - device is scheduled for migration.
 - **In Progress** - device is being migrated.
 - **Migrated** - device has been successfully migrated.
 - **Canceled** - device was manually stopped from being migrated, or the device was removed from a migration schedule.
 - **Failed** - device could not be migrated.
- **Self-Migration** - indicates whether or not self-service is enabled for the end user. If it indicates that it is enabled, the end user can schedule a migration from the self-service portal.
- **Last Login** - the most recent date and time a registered user of this device logged into the device.
- **Scheduled Time** - date and time when the device migration is scheduled.
- **Migrated Time** - date and time when the device migration was successfully completed.
- **Collection** - name of the migration wave configured in ODMAD.
- **Last Notified** - date and time when the most recent notification about this device was sent.
- **Last Discovered** - date and time when the device discovery was run from ODMAD.
- **Events** - link to the ODM Active Directory for this device where you can get more details about jobs and other information about the selected device.

Workstation Detail Panel

Displays more information about the selected workstation or device as described below:

- **Title** - name of the selected workstation.
- **As of Date** - date when the linked user of the workstation was discovered.
- **Events** - link to the ODM Active Directory for this device where you can get more details about jobs and other information about the selected device.
- **Linked Users** - list of active users with a user profile in the source AD that are linked to the selected device. The total number of linked users is also indicated.
 - **Name** - name of the linked user.
 - **Email** - email address of the linked user.
 - **Last Login** - the most recent date and time the user logged into the device.

- **Notification History** - list of notification emails about the device that were sent by an administrator or linked user.
 - **Template Name** - name of the email template that was used to send the notification.
 - **Sent Date** - date and time the notification was sent.
 - **Recipient** - name of the user who receives the email.
- **Scheduling History** - list of migration scheduling attempts for the device. All scheduling attempts are logged irrespective of the status of the migration.
 - **Name** - full name and username of the On Demand Migration Self-Service migration administrator who scheduled a migration.
 - **Migration Date** - date and time the migration was scheduled.

Managing Self-Migration

1. Click **Manage Self-Migration** from the Actions Menu. The *Manage Self-Migration* panel opens.
2. Review and update the configuration setting in this panel as described below:
 - **Self-Migration** - select one of the following options described below:
 - **Enabled** - the device can be migrated by a linked user.
 - **Disabled** - the device can be migrated only by the administrator.
 - **Schedule Migration** - set a schedule time slot. See Scheduling in the Settings topic for more details. When you set the schedule and save the settings, the Scheduled Time column for the selected workstation in the List View will display the date and time. The **Status** column value will change to *Scheduled*.

Sending Notifications

This action lets you send a notification at any time for one or more selected workstations.

1. Select one or more workstations.
2. Click **Send Notifications**. The *Send Notification* panel opens.
3. Configure the options as described below:
 - **Template** - choose a notification template.
 - **Send To** - select from one of the following recipient options:
 - **All users on workstation** - all users whose profiles are associated to the selected workstation will receive the notification
 - **Last Logged in user** - only the user who most recently logged into the selected workstation will receive a notification.

Migrating Workstations manually

This action is available to administrators only unless this action is granted to end users from the *Settings* tab. Workstations can be migrated manually without any scheduling.



NOTE:

- The workstation migration process will start immediately and cannot be canceled once submitted.
 - The migration job will start in about 15 minutes.
 - The linked workstation will automatically reboot.
 - Migration time varies (usually 15 to 30 minutes) based on connection and data size.
1. Select one or more workstations. Workstations that are not ready will not be submitted for migration.
 2. Click **Migrate Now**. The *Migrate Now* panel opens.
 3. Review the workstations listed in the two sections:
 - **Eligible Workstations** - lists the workstations or devices that meet the following criteria: *Self-Service* is **Enabled** and *Status* is **Ready to Migrate**.
 - **Non-Eligible Workstations** - lists the workstations or devices that do not comply with the eligibility criteria described.
 4. Click **Start Migration**.

Removing a Scheduled Migration

This action allows you to remove the schedule setting for one or more selected workstations in the list.

1. Select one or more workstations.
2. Click **Remove from Schedule**. The Remove from Schedule panel opens.
3. Configure the options as described below:
 - **Send Notification** - select this checkbox if you want to send a notification about the cancellation
 - **Template** - choose a notification template.
 - **Send To** - select from one of the following recipient options:
 - **All user on workstation** - all users whose profiles are associated to the selected workstation will receive the notification
 - **Last Logged in user** - only the user who most recently logged into the selected workstation will receive a notification.
4. Click **Confirm**. The **Status** column value for the selected workstation will change to *Canceled*.

Notifications

In this topic:

- [About Notifications](#)
- [Creating a Notification Template](#)
- [Editing a Notification Template](#)
- [Removing a Notification Template](#)

About Notifications

The Notifications tab lists the Default and custom notification templates that are reusable formats for creating and sending automated emails to users. By using templates, administrators can quickly generate and send notifications without having to manually create each message from scratch. Notification Templates ensure that all notifications related to a specific event have a consistent format, including subject line, body text, and visual elements. They allow for dynamic data insertion to personalize the notification content.

Notification emails are sent from the On Demand Migration Self-Service service.

Actions Menu

New Template

This action lets you create new notification template from scratch. It uses the system default properties as suggestions that you can either keep or modify. See [Creating a Notification Template](#) for more details.

Duplicate Template

This action lets you create new notification template from an existing notification template. It uses the properties of the selected template as suggestions that you can either keep or modify. See [Creating a Notification Template](#) for more details.

Remove Template

This action lets you remove a selected template. You cannot remove the **Default** notification template. See [Removing a Notification Template](#) for more details.

List View

Displays a tabular information about all the templates created. Use the **Edit Columns** to show or hide columns in the list. The columns are as described below:

- **Template Name** - name of the notification template.
- **Added By** - indicates whether the template is a system template or created by an end user. valid values are: *System* and *User*.
- **Created Date** - date and time stamp indicating when the notification template was created.
- **Last Modified** - date and time stamp indicating when the notification template was most recently modified.

Template Detail panel

Displays more information about the selected notification template as described below:

- **Template Name** - enter name of the template.
- **Sender Display Name** - enter your name, business, or a custom identifier that appears in the "From" field of the email.
- **Message Subject** - enter the title of the message.
- **Message Body** - enter text that will be displayed as the message body. You can use the markup syntax as described below. Click **Clear All** to delete the entire content.

Allowed Message Body Syntax	Description
[b]bold text[/b]	bold text

Allowed Message Body Syntax	Description
[i]italic text[/i]	<i>italic text</i>
[u]underlined text[/u]	<u>underlined text</u>
[a(url)custom link][[/a]	custom link
%%Table%%	list of workstations
%%PortalLink%%	link to Self-Service Portal

- **Add Logo** - click this link to add an image to the logo box. Supported formats are: JPEG, PNG, and SVG. The maximum size of the image is 100 KB.
- **Revert to Default** - click this link to reset the notification template properties to the system default.

Creating a Notification Template

You can create customized notification templates in two ways by creating a new template from scratch or copy an existing template.

To create a new template

1. Login to Quest and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migrate > Self Service > Device Migration**.
3. Select the *Notifications* tab.
4. Click **New Template**. The *New Notification Template* panel opens.
5. Specify a name for the template.
6. Modify the suggested property values. Properties are described in the previous section.
7. Click **Save**. The new notification template is added to the List View.

To copy an existing template

1. Login to Quest and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migrate > Self Service > Device Migration**.
3. Select the *Notifications* tab.
4. Select any template that you want to copy. Click **Duplicate Template**. The *New Notification Template* panel opens.
5. Provide a new name for the template.
6. Modify or retain the copied property values. Properties are described in the previous section.
7. Click **Save**. The new notification template is added to the List View.

Editing a Notification Template

1. Login to Quest and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migrate > Self Service > Device Migration**.
3. Select the *Notifications* tab.

4. Click any template that you want to modify. The *Edit Notification Template* panel opens. You can modify the **Default** template as well.
5. Modify or retain the property values. Properties are described in the previous section.
6. Click **Save**. The modified notification template is updated.

Removing a Notification Template

1. Login to Quest and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migrate > Self Service > Device Migration**.
3. Select the *Notifications* tab.
4. Select the templates that you want to remove from the list. Click **Remove Template**. The *Remove Notification Template* confirmation dialog opens.
5. Click **Remove**. The modified notification template is removed from the List View.

Settings

The Settings tab helps you set company-wide time slots when workstation or device migration can occur.

Device Migration
Dashboard Users Workstations **Settings** Notifications

Save
↶ Revert to Defaults

Settings

Configure scheduling settings available to users. Administrators can schedule additional migrations above the user limits.

Support Email for User Portal ⓘ

administrator@democorp.com
✕

Daily Limit ⓘ

200
✕

Limit per Time Slot ⓘ

20
✕

Allow "Migrate Now" ⓘ

Set Migration Date Range ⓘ

Choose the initial date and time range available to users for scheduling migrations and customize as needed.

Time Zone

Asia/Calcutta
✕

Date Range ⓘ

2025-05-11 – 2025-05-17
📅

Default Time Range ⓘ

09:00 AM
–
05:00 PM

Available Days ⓘ

- Sunday
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday

Support Email for User Portal - email address displayed in the Self-Service Portal for contacting IT Support.

Setting Scheduling limits

Daily Limit - maximum number of migrations users can schedule per day.

Limit per Time Slot - maximum number of migrations users can schedule per one-hour slot. This is not an enforced limit and serves as a suggestion for administrators. Migrations are always queued.

Migrate Now - select this option to allow end users to migrate their devices immediately from the user portal.

Setting the Migration Date Range

This section helps you to choose the initial date and time range available to users for scheduling migrations and customize as needed.

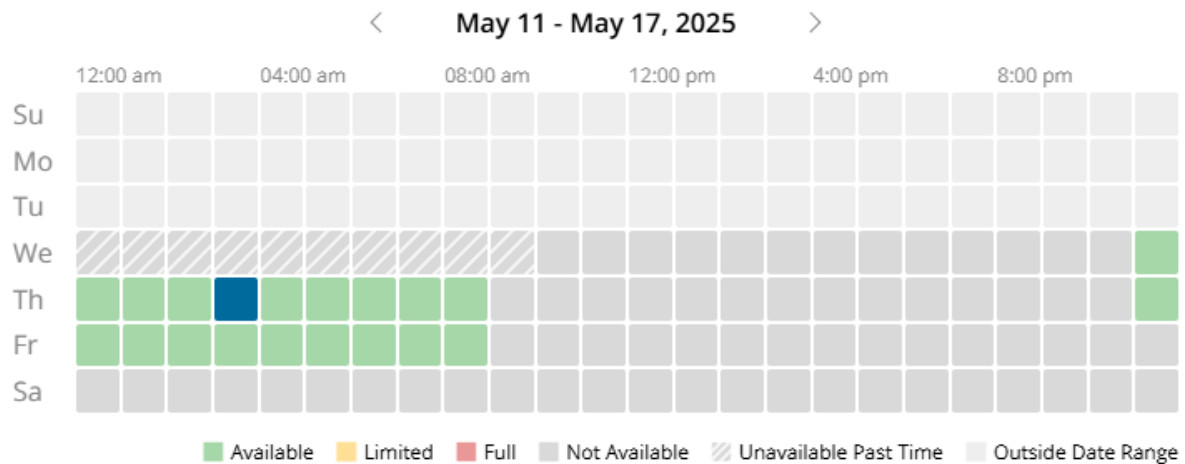
Time Zone - select a server time zone. The time zone is relative to the administrators that are planning the migration, not to the end users. Both Admins and end users will see the schedule relative to their browser time zone. For example, if you select UTC as the server time zone then, if a user or admin is located in the EST timezone, they will see the times shifted by -4 or -5 hours depending on the daylight savings in their browser.

Date Range - dates available for migration from the start date to the end date, including the end date. To set the date range, click the calendar icon. Then select the start date, and the end date.

Default Time Range - time slots available for migration and covers every minute from the start time to the end time, including the full final hour. The time range is specified using a 12-hour clock. For example 09:00 AM - 5:00 PM. To set the default time range, click the starting time and enter the desired start time. Then click the ending time and enter the desired end time.

Revert to Defaults - click this link to revert the settings to the system defaults.

When users click **Manage Self-Migration** from the Action Menu in the Workstations or Users tab, they are presented with a color-coded scheduling calendar that is based on the Limits and date-time ranges configured in the Setting tab, from where they can choose a convenient time slot to migrate their devices.



Color codes:

- **Green** - Available.
- **Yellow** - 80% available.
- **Red** - Over booked.
- **Grey** - Within the date range in settings and only accessible to administrators.

- **Light Grey** - Outside of the date range in settings.
- **Striped** - Past time and cannot be booked.

Quest Software creates technology and solutions that build the foundation for enterprise AI. Focused on data management and governance, cybersecurity and platform modernization, Quest helps organizations address their most pressing challenges and make the promise of AI a reality. Around the globe, more than 45,000 companies including over 90% of the Fortune 500 count on Quest Software. For more information, visit www.quest.com or follow Quest Software on [X \(formerly Twitter\)](#) and [LinkedIn](#).

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