



Power365® Premium Integration Pro Cloud to Cloud

## **Quick Start 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

This guide is designed to provide a quick reference for getting set up with a Power365 Premium Integration Pro project.

At the end of this guide you will be familiar with supported setups, basic requirements, and deployment components.

## Assumptions

This guide covers the setup of migration and integration services from one source (1) source Cloud Only Microsoft 365 Worldwide Tenant between another (1) target Cloud Only Microsoft 365 Tenant. However, additional environment scenarios are supported as outlined below.

This guide does not cover Domain Sharing or Domain Moves specifically but these services can easily be enabled without amendments to the information provided in this guide. The migration of servers and workstations are also not covered in this guide.

## Supported Migration and Integration Setups

The following describes the supported migration project models.

1. **Merge** (One to One) – Covered in this guide. This is the classic Tenant-to-Tenant migration project when one cloud or hybrid environment is migrating to another.
2. **Divest** (One to Many) – When one Cloud or Hybrid environment is migrating resources to many different cloud or hybrid environments.
3. **Divest in Parallel** (One to Many) – Power365 offers a parallel divestiture solution whereby, parallel Migration and Domain Sharing projects are running but each parallel project has different goals and timelines, is managed by different teams that don't communicate and project ownership is separated. Therefore, this type of one-to-many divestiture must have isolated experiences but share the same single source tenant without overlapping or conflicting with one another's efforts or licensing.
4. **Consolidate** (Many to One) – When many different cloud or hybrid environments are migrating to a single environment.

These setup scenarios may include the entire tenant or just a subset of resources.

## Supported Environment Setups

The following describes the supported migration and integration deployment models.

1. **Hybrid to Hybrid** – All the features and services of Premium Integration but now supporting the Integrated Directory experience where directory orchestration operations are managed from a single web interface, there isn't any SQL server to install, and best of all troubleshooting doesn't require access to local machines to review event logs.
2. **Cloud to Cloud** – Covered in this guide. All the features and services of Premium Integration Pro but now supporting cloud only Microsoft 365 tenant migration and integration project scenarios. This includes Domain Sharing and Moves.

3. **Hybrid to Cloud** – All the features and services of Premium Integration Pro but now supporting migration and integration between a source Hybrid Microsoft 365 tenant and a target Cloud only tenant. This includes Domain Sharing and Moves.

4. **Cloud to Hybrid** – All the features and services of Premium Integration but now supporting migration and integration between a source Cloud only Microsoft 365 tenant and a target Hybrid tenant. This includes Domain Sharing and Moves.

**Definitions:** The term “Hybrid” in this instance is referring to a local On-Premises Active Directory that is coupled with a Microsoft 365 tenant to create a hybrid integration of services. The term “Cloud” is denoting a Microsoft 365 tenant that does not have any on-premises Active Directory component currently attached.

## Getting Started

This guide is broken into 3 easy steps to get started quickly. An optional 4th step can be found in Appendix A which describes advanced setup utilizing the custom mapping feature in Power365 Directory Sync.

1. Verify Setup Requirements
2. Set up a Premium Integration Project
3. Set up a Read and Match Workflow (Groups & Teams Only)

Optional Setup (Appendix A)

4. Set up a custom Template, Read, Match, Stage, and Write Workflow (Use Power365 Directory Sync to create the target object and utilize the custom mapping functionality)

### Step One: Verify Setup Requirements

#### Application Accounts

Before starting have Global Administrator account credentials ready for all source and target tenants that are in scope.

Have at least one (1) available Microsoft 365 license for our application account to consume for the duration of the project. Once the project is closed, the account license can be reclaimed.

Visit the [Help Center](#) for more details about [accounts](#) and [permissions](#) requirements .

#### Directory Sync Agents

There will be no Directory Sync Agents required for Cloud to Cloud setup.

#### Domain Sharing

There are additional requirements if Domain Sharing Email Rewrite Services (ERS) are required for your Premium Integration Project. ERS setup is not covered in this guide. To find out more about ERS requirements, download our Tenant-to-Tenant prerequisites guide.

### Step Two: Set up a Premium Integration Project

#### Create New Premium Project

Power365 Tenant-to-Tenant project setup is automated, making it quick and easy to get started. To begin follow these steps for creating your first Power365 Premium Integration project.

1. Log in to *Power365*
2. Choose *Tenant-to-Tenant*
3. Click *New Project*
4. Choose the *Premium Integration Project* type, click *Next*
5. Enter a *Project Name and Description*, click *Next*
6. Click *New* to add your Tenant Environments
7. Have your Microsoft 365 Global Administrators' credentials ready.
8. If there is more than 1 administrator, both administrators must be present to continue setup.
9. Click *Connect*
10. Enter your Global Administrator's credentials for the first tenant environment.
11. Accept the permissions requested.
12. Repeat steps 9 – 11 for all subsequent tenant environments.
13. Select your *environment pairs*, click *Next*
14. Select your *domain pairs*, click *Next*
15. Choose *Discovery options*, click *Next*
16. Choose *Matching options*, click *Next*
17. Choose *Create options for Users, Teams, and Unified Groups*, click *Next*
18. Enter *New Users Default Password*, be sure it meets requirements, click *Next*
19. Choose *Free/Busy options*, click *Next*
20. *Note: In a hybrid setup, this is where you would be presented with the Directory Sync Agent setup, since this is a Cloud to Cloud project, the system will skip this step.*
21. Choose *Domain Sharing options*
22. Choose *No, Maybe Later* if you don't have your ERS requirements ready, click *Next*
23. The *Project Setup Summary* will open
24. Review the configurations, click the header to modify the options
25. When ready, click *Next*
26. Enter a valid email address to receive your discovery notifications
27. Click *Start Discovery*

Environment discovery will now begin. When it completes an email will be sent to you. The larger and more complex the environment, the longer initial discovery will take. After a successful initial discovery has completed, delta discoveries will be run every 24 hours by default. Discovery intervals are configurable. If your discovery takes longer than 24 hours on average, be sure to adjust the schedule.

For more information about [projects](#), [permissions](#) and other topics visit the [online help center](#).

## Step Three: Set up a Read & Match Workflow (Office 365 Groups and Teams Only)

Now that the Premium Integration Project is set up there is one final step to ensure a successful migration experience for Office 365 Groups and Teams. One of the key features of Groups and Teams migration services is synchronizing Team and Channel membership, ownership, and additionally for Office 365 groups their subscribers. To accomplish this, Power365 Directory Sync must have a set of matches defined to determine who is a member. To do this, a single Directory Sync Workflow must be set up to read from your tenant environments and match objects between them. Follow these steps to set up the Workflow.

1. While logged in to [Power365](#)
2. Navigate to [Directory Sync Dashboard](#)
3. Click *New* under Workflows or click *Create a Workflow* from the left menu
4. Enter a *Workflow Name* and *Description*
5. Select your *source* and *target cloud environments*, click *Next*
6. Choose *One-Way Sync*, click *Next*
7. In the right-side list, *Delete* the *Stage Data* and *Write To* steps
8. *Confirm* deletions by clicking *Yes*
9. Click *Select* on the *Read From* step
10. Select *both cloud environments*, click *OK*
11. Click *Select* on the *Match Objects* step
12. Choose the source environment
13. Choose the target environment
14. Choose the desired matching attribute(s)
15. It is recommended the same attribute pairings used for Tenant-to-Tenant matching options are used in this case
16. Do not check the *Matched across All Object Types* option, Click *OK* to close the matching settings dialog. Once it is closed, click *Next* to continue
17. Choose your *Schedule* options from the following then click *Next*:  
  
*Manually* is recommended for testing purposes and for big bang Groups and Teams migrations where changes to the matching table won't impact the migration event. *Scheduled* is recommended if migrating Groups and Teams along with your Users over time.
18. Choose your *Alert options*
19. Click *Skip* to set up later if required
20. Review your *Workflow Summary*
21. Click *Edit* to modify any desired configurations

22. When ready, click *Finish*
23. From the *Directory Sync Dashboard*, select the Workflow just created, click *Run*
24. When the Workflow is complete, verify that the Users are matching as expected and there are no errors that need to be resolved
25. The Workflow will need to be run again after your Users and Groups have been created in the target environments

## What's Next?

Now that the Premium Integration Project is set up and discovery is complete, it is time to finish up any additional setup requirements. Follow these guidelines to finalize your configurations and then begin preparing Users, Groups and Teams.

### Configurations

There are three (3) optional but recommended configurations.

1. **Migration Profiles** – Migration Profiles manage prepare, sync, and cutover options. Every User, Group, or Team has a migration profile assigned to it. There is a default migration profile everyone starts with. Migration profiles can be set or changed at any time. It is recommended that you create at least one (1) migration profile for users, one (1) for rooms/resources/shared mailboxes, and one (1) for Office 365 Groups and Teams to manage the different migration workloads. Beyond that, create as many as are required to meet the project's needs. Click [here](#) to find out more about Migration Profiles.

It is recommended that you set the *license* setting in the Migration Profile, especially if you have non-enterprise licenses assigned to the source users.

2. **Migration Waves** – Migration Waves can be used to organize your Users, Groups, and Teams into logical groupings so that bulk actions and schedules may be applied to the members. Migration Waves can be managed through local Active Directory Groups or directly from the application, whichever is more suitable to the project needs. Users, Groups and Teams can be assigned to a Migration Wave individually from the UI, added as a member of a local group or in bulk by uploading a list of wave assignments by Users, Groups and Teams. To find out more about Migration Waves, click [here](#).
3. **Migration Schedules** – Migration Schedules provide an optional means to schedule the start date and time of the Prepare, Sync, and Cutover activities. They also allow the Sync frequency and number of intervals to be set. Schedules are assigned to Migration Waves. More details about Migration Schedules can be found [here](#).

### Activities

All configurations are now complete. When you are ready it is time to begin creating target objects, doing the initial content syncs, and then planning the cutover capacity and strategy. The following section provides guidance about each of these different activities Prepare, Sync, and Cutover with links to additional information.

1. **Prepare** – It is recommended that all target Users be created at once. If possible, this should be scheduled during off-hours to minimize impact and maximize available resources. This is typically a one-time activity unless new hires are added to the migration project. However, it is recommended that new hires be on-boarded to the target system and not migrated.

After the target objects are created don't forget to run the Workflow for matching (created earlier

in this guide) again.

2. **Sync** – The first sync will provision Users' licenses and mailbox enable the target User so content migration may begin. It is recommended that Users not be provisioned until you are ready to begin migrations and are close to a planned Cutover date. Don't sync users and then wait weeks or months later to sync them again. Plan your initial Sync as close to the Cutover date as possible. Different migration workloads have different synchronization characteristics that can impact throughput, throttling, consumption, and how many Syncs and Cutovers can be supported within a given time period. Ramp up to tenant capacity then plan based on what amount of change the organization can absorb during a single Cutover event cycle.
3. **Cutover** – Cutover events are the most critical activity within a User or resource migration project. This is the time period when the end-user is most impacted. Therefore, it is critical that Cutover events are planned carefully by first running several pilot events to mature the process and determine how many object Cutovers can occur within the time frame allotted to the event. Many migration projects use the weekend to run their Cutover events because it provides more time with lower impact to accomplish more migrations. However, it also injects more change at once. Other projects may utilize nightly or bi-weekly schedules to manage Cutovers. Whichever type of schedule fits your project, validate the model to minimize impact on the end-user. After the pilot events, compile the findings to determine how much the migration service can manage during the event period and how much change the organization can absorb during each Cutover event.

Learn more about Prepare, Sync, and Cutover by visiting the [online help center](#).

## FAQs

### 1. What workflows are created automatically?

There is a Workflow created for the Prepare, Provision, and Cutover activities for each project. A total of four Workflows will be configured initially, and they are:

- Power365 Prepare Workflow for *ProjectName*
- Power365 Provision Workflow for *ProjectName*
- Power365 Cutover Target Workflow for *ProjectName*
- Power365 Cutover Source Workflow for *ProjectName*

Additional Workflows will be needed when domain move is in scope and will be created automatically when the domain move job is triggered.

### 2. What other components are automatically configured in Directory Sync?

During the Tenant-to-Tenant Project setup, the cloud Environments will be automatically deployed and configured for you. The required Workflows, associated Templates, and advanced mappings are also auto-generated. If a Hybrid Tenant is used, a local Environment will be created and associated with cloud Environment automatically.

*Note, additional local Environments can be added and associated with the tenant in a multi-domain/forest setup.*

### 3. Can I edit the workflows or template mappings?

Not in version 1 but this ability is coming soon. In the meantime, it is possible to use Power365 Directory Sync to create the User objects ahead of time using custom mappings.



4. If the Template mapping cannot be edited, is there a way we can create the users with custom user attributes such as display name based on 'FirstName, Last Name'?

As mentioned above, the answer is Yes. To achieve this, additional Workflow(s) and Template(s) should be created in Power365 Directory Sync. There is a sample setup guide under Appendix A in this document.

5. Can I control where I want the Users created, Cloud vs Hybrid On-Prem?

Yes. If you want to create the target User in a location that is different from the source, use Power365 Directory Sync to create the User object, then match the target User in Power365 Tenant-to-Tenant.

6. Can Power365 Tenant-to-Tenant remove the license assigned to Room/Resource and Shared Mailboxes?

Yes, this feature is coming soon.

7. Where do I set up GAL Sync?

All directory integration requirements will be orchestrated and managed from Power365 Directory Sync.

8. Where do I migrate or sync Distribution & Security Groups?

Although Distribution and Security Groups are still discovered and displayed in Power365 Tenant-to-Tenant, it no longer migrates groups or members. They are discovered for matching purposes and displayed for matching reporting purposes. DS Lite provided limited solutions for Bi-Directional GAL Sync therefore all directory integration requirements will be orchestrated and managed from Power365 Directory Sync.

9. How do I sync a User's personal contact properties?

All directory integration requirements will be orchestrated and managed from Power365 Directory Sync.

10. What advantages does Power365 Directory Sync bring to my Migration and Integration Projects?

There are several areas of improvement that Power365 Directory Sync offers with Cloud to Cloud projects.

- **No Agents to Install** with Cloud to Cloud projects!
- **Intelligent Provisioning** – Target Objects are created based on the source object, either in the Cloud or On-Prem
- **Mixed Users** – If your source User is Hybrid but you prefer your target User to be Cloud only, we support that! Just create and match them before running Prepare.
- **Cloud Only with Hybrid** – No more separate projects to migrate your shared mailboxes! Shared, Room and Equipment Cloud only Mailboxes are fully supported with your integration projects.

## 11. How do I re-Prepare a User if the target User was deleted from the tenant?

The following steps should be taken to re-Prepare a User that was removed from the target tenant by mistake.

- Perform the delta discovery for the target tenant within Power365 Tenant-to-Tenant. The discovery process will identify the removed object and mark the object as deleted.
- Perform a reconcile read against the tenant in Power365 Directory Sync, the read Workflow will remove the deleted object in the backend.
- Once the above steps are done, the admin can then proceed to re-Prepare the User.

# Appendix A

Set up a custom Template, Read, Match, Stage & Write Workflow (Use Power365 Directory Sync to create the target object and utilize the custom mapping functionality)

## Custom Template

1. While logged in to [Power365](#)
2. Navigate to [Directory Sync Dashboard](#)
3. From the left menu select *Templates*, click *New*
4. Provide the template a *name* and *description*, click *Next*
5. Choose the *source environment type*, click *Next*
6. Choose the *target environment type*, click *Next*
7. Specify how you want to sync the *Users*, click *Next*
8. Specify how you want to sync the *Groups*, click *Next*
9. Specify how you want to sync the *O365 Groups and Teams*, click *Next*
10. Specify how you want to sync the *Contacts*, click *Next*
11. Specify the *default password*, click *Next*
12. Select the mapping you would like to modify. For the purpose of this guide, we will modify the default *displayname* mapping so we can create the target user object with a (*GivenName*, *SurName*) format.  
  
***if((s.sn = NULL)or(s.sn = givenName = NULL),s.CN,S.givenName+", "+s.surName)***
13. When finished modifying the mappings, click *Next*
14. Click *Finish* to complete the template setup.

## Read, Match, Stage, and Write workflow

1. While logged in to [Power365](#)
2. Navigate to [Directory Sync Dashboard](#)
3. Click *New* under *Workflows* or click *Create a Workflow* from the left menu
4. Enter a *Workflow Name* and *Description*
5. Select your *source* and *target cloud environments*, click *Next*
6. Choose *One-Way Sync*, click *Next*
7. Click *Select* on the *Read From* step
8. Select all *cloud environments*, click *OK*
9. Click *Select* on the *Match Objects* step

10. Choose the source environment

11. Choose the target environment

Choose the desired matching attribute(s). It is recommended the same attribute pairings used for Tenant-to-Tenant matching options are used in this case

12. Do not check the *Match across All Object Types* option

13. Click *Select* on the *Stage Data* step

14. Select a Template, in this case, make sure you select the Template created in the above step. Click *Next*

15. Choose your source Environment, click *Next*

16. Choose your target Environment

17. Choose your target domain, click *Next*

18. Click *Next* to skip the object filter setup for the purpose of this guide. You may configure the filter based on your project needs. Click *Finish*

19. Click *Select* on the *Write To* step

20. Choose the Environment to write to, click *OK* to close the Write step dialogs. Once completed, click *Next*

21. Choose your *Schedule* options from the following then click *Next*:

22. Choose your *Alert options*

23. Click *Skip* to set up later if required

24. Review the *Workflow Summary*

25. Click *Edit* to modify any desired configurations

26. When ready, Click *Finish*

27. From the *Directory Sync Dashboard*, select the Workflow just created and click *Run*

28. When the Workflow is complete, verify the source Users are created in the target tenant

Once you have verified that Power365 Directory Sync provisioned the Users in target tenant, trigger Tenant discovery and matching via the previously configured Tenant to Tenant Premium Integration project. Once the discovery and matching processes are completed, the target Users with their Display Name transformed will be matched to the source Users based on the matching settings configured in the Tenant to Tenant Premium Integration project. Prepare and Provision jobs can then be submitted as you would with non-matched users.