

Installation and User Instructions

Apps4.Pro Migration Manager

All-In-One Migration Admin Guide



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Disclaimer

This document provides assistance on Migrating the below Microsoft workloads from one organization to other.

1. SharePoint Migration
2. Planner Migration
3. Teams Migration
4. Private Chat Migration
5. Viva Engage (Yammer) Migration
6. Groups Migration

Read the instructions carefully and perform the steps as mentioned in this document.

Document Version History

Revised On	Version No.	Revised by	Revisions
June 13 2024	1.0	Josephine Sweetey	<ol style="list-style-type: none"> 1. New Task Model Migration added for Teams, SharePoint & Private Chat <ol style="list-style-type: none"> a. Re-try and re-run job corrected wherever applicable. 2. Scheduler Settings added 3. New screenshots added for settings, App Data & Mapping 4. Stream and OneDrive Removed wherever applicable 5. Mailbox removed from Group Migration 6. Footer – copyright added 7. Header – Apps4Pro Logo moved to Left
June 28 2024	2.0	Josephine Sweetey	Modified roles and licenses updated as per latest revisit
Aug 3 2024	3.0	Josephine Sweetey	<ol style="list-style-type: none"> 1. Add Profile added in General Section Private Chat Migration 2. New Private Chat Settings related to attachments & inline messages added 3. Chat migration behaviour for a trial license added.
Sep 10 2024	4.0	Josephine Sweetey	<ol style="list-style-type: none"> 1. Whiteboard related roles & permissions removed SharePoint, Teams, Chat Migration 2. Reference to Scheduler Settings removed 3. Screenshots related to Task Tab updated Teams, Chat Migration 4. Whiteboard related stuff removed

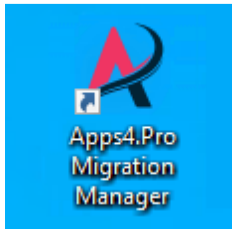
Step 1 : Global Setup

1. How to install

You can *download* the latest Migration App from Apps4.Pro site and install the same.

2. How to access

Once you have installed this app, you can open the app by clicking desktop short-cut icon as shown in below image:



3. User Creation

To begin with, create new user accounts to play the roles of Source & Target Connector. They can bear the naming convention as below to indicate that it is the Service account performing the migration.

Source Connector Account : *SourceConnector@<SourceTenantName>.com*

Target Connector Account : [*TargetConnector@<TargetTenantName>.com*](#)

4. Add Profile

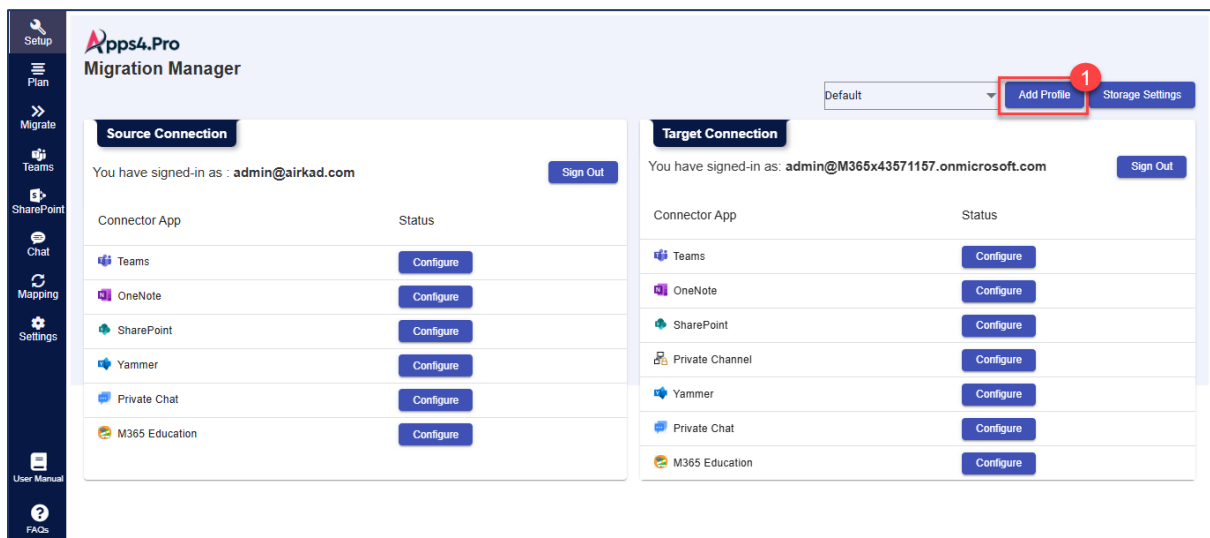
Rather than going for multiple installation, we can add multiple profiles using the option 'Add Profile'.

Each profile created can have

- Unique Source & Target Connectors
- Unique set of Jobs / Tasks
- Unique Global Settings like Team Settings, Cutover Settings
- Unique User & Group Mappings

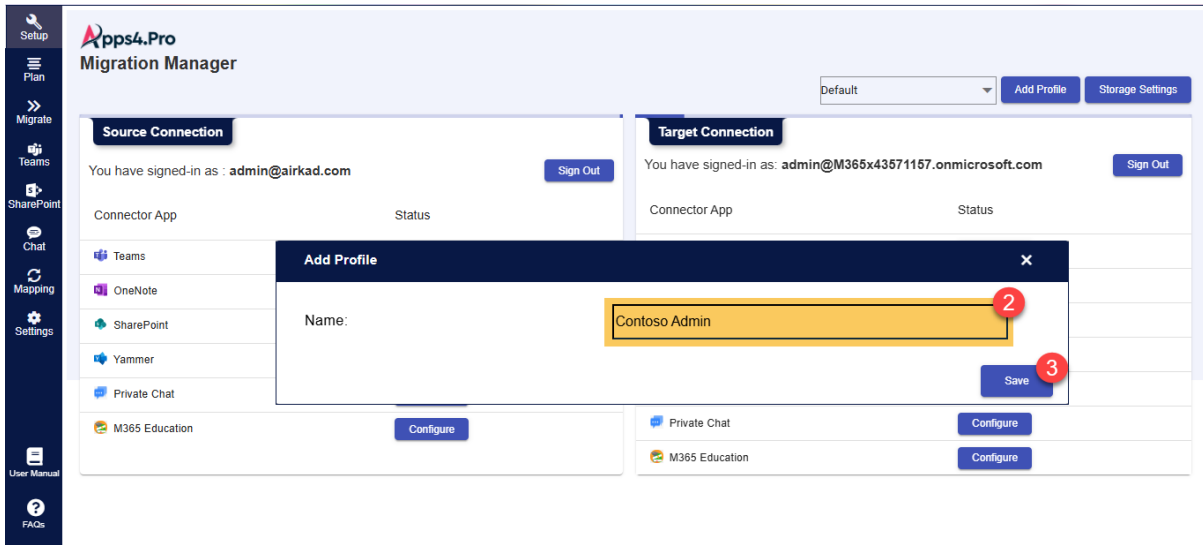
Follow the below steps to Add a new Profile & switch among profiles.

Step 1 : From 'Setup' tab, Click on 'Add Profile'

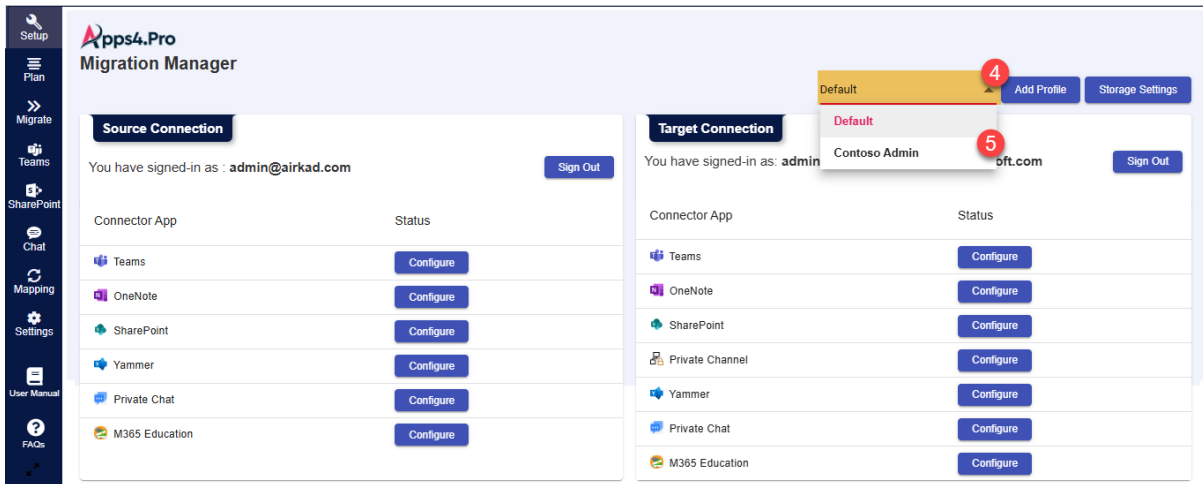


The screenshot shows the Apps4.Pro Migration Manager interface. On the left is a navigation sidebar with options like Setup, Plan, Migrate, Teams, SharePoint, Chat, Mapping, Settings, User Manual, and FAQs. The main area is divided into two panels: 'Source Connection' and 'Target Connection'. The 'Source Connection' panel shows a signed-in user 'admin@airkad.com' and a table of connector apps (Teams, OneNote, SharePoint, Yammer, Private Chat, M365 Education) with 'Configure' buttons. The 'Target Connection' panel shows a signed-in user 'admin@M365x43571167.onmicrosoft.com' and a similar table of connector apps. In the top right corner, there are buttons for 'Add Profile' (highlighted with a red circle and the number 1) and 'Storage Settings'. A dropdown menu is currently set to 'Default'.

Step 2 : Enter the Profile Name and click 'Save'.



Step 3 : Click on the Drop Down to switch to the desired Profile.



Step 4 : Configure Service Accounts, Mappings and Settings and migrate different Workloads.

It gives an experience similar to another installation.

5. License and Roles

The below privileges / permissions are required for each of the specific migration.

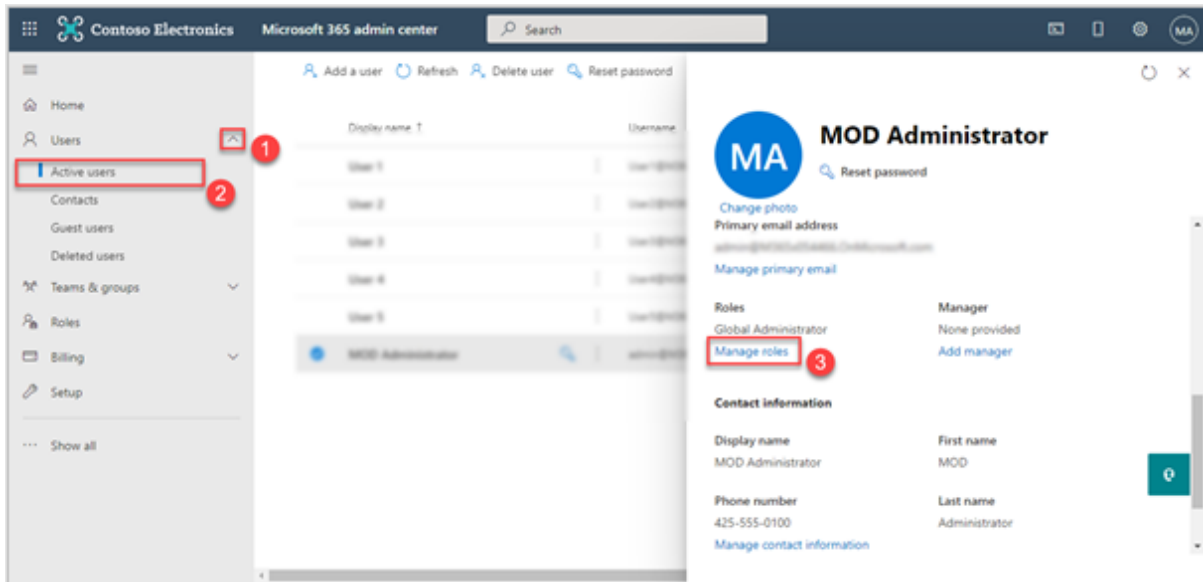
Migration	License Required	Mandatory Access Required	Additional Access Required for Connector
ALL MIGRATIONS	Microsoft 365/Office 365(E3 or E5) License	-	-
SharePoint Migration	SharePoint License	Source & Target : 1. SharePoint Administrator with Admin Consent and Delegated Permission 2. Term Store Administrator to	To be a Site Admin of the sites to be migrated

		migrate Global level term group	
Planner Migration	Microsoft Planner License Exchange Online License (Required for Target Connector only)	User Administrator	To be a member of the "Plans" to be migrated
Teams Migration	Microsoft Teams License	Source & Target : Teams Administrator with Admin Consent and Delegated Permission	<ol style="list-style-type: none"> 1.To be an owner & member of the "Teams" to be migrated 2.To be an owner of the Private / Shared Channels 3.To be an owner of the assignments & OneNote for an Education Tenant
Private Chat Migration	Microsoft Teams License	Source : Source Connector with Admin consent and Application Permission Target : <ol style="list-style-type: none"> 1. Target Connector with Delegated Permission 2. Secondary Admin privilege for the Users' OneDrive part of migration 	-
Viva Engage (Yammer) Migration	Yammer Enterprise License	Source & Target : Yammer Administrator + User Administrator	To be a member of the "Viva Engage(Yammer) Private Groups" to be migrated
Groups Migration	Microsoft Planner License Exchange Online License (Required for Target Connector only)	Source & Target : Groups Administrator	To be a member & owner of the "Groups" to be migrated

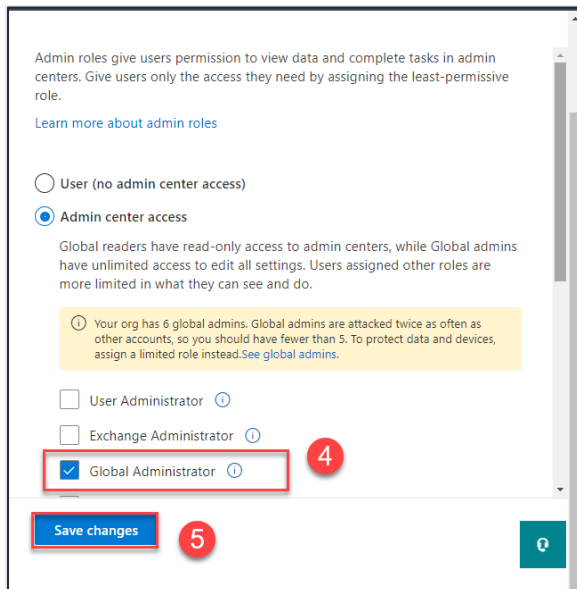
Setup 'Global Administrator' Role

Please follow the steps as stated below to provision the Global Admin role.

Step 1: Go to Admin center -> User section -> Active users -> Select the Service account and click on Manage roles



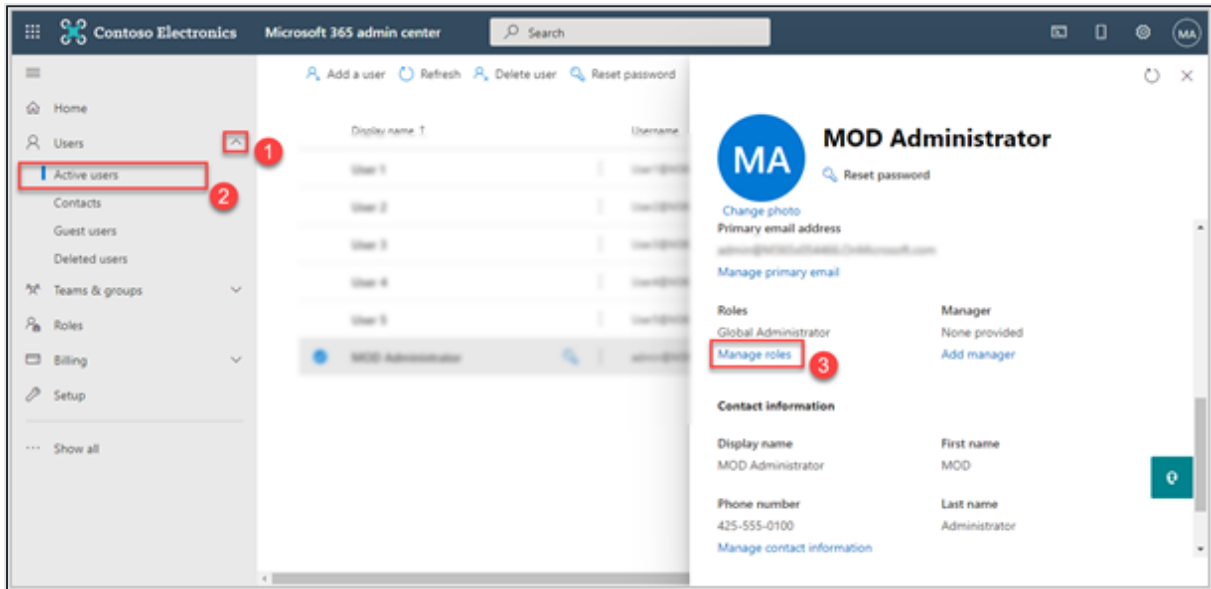
Step 2: Then select the Global Administrator under Admin center access.



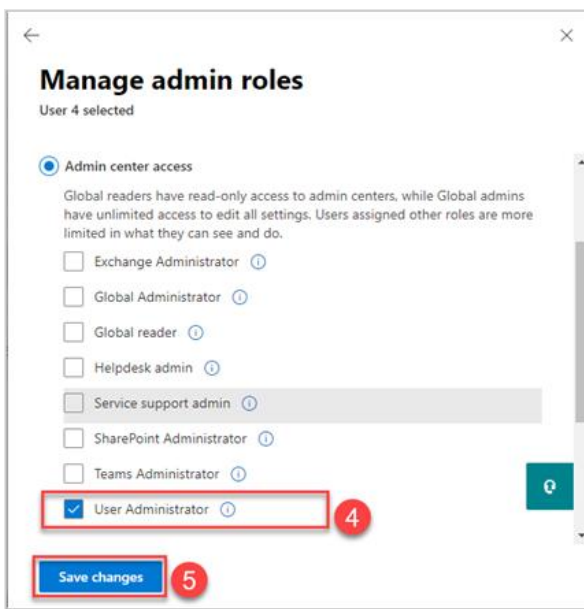
Setup 'User Administrator' Role

Follow the steps as stated below to setup the User Administrator role.

Step 1: Go to Admin center → User section → Active users → Select the Service account and click on Manage roles



Step 2: Then select the User Administrator under Admin center access.



Step 2 : Provide Admin Consent & Delegate Permission

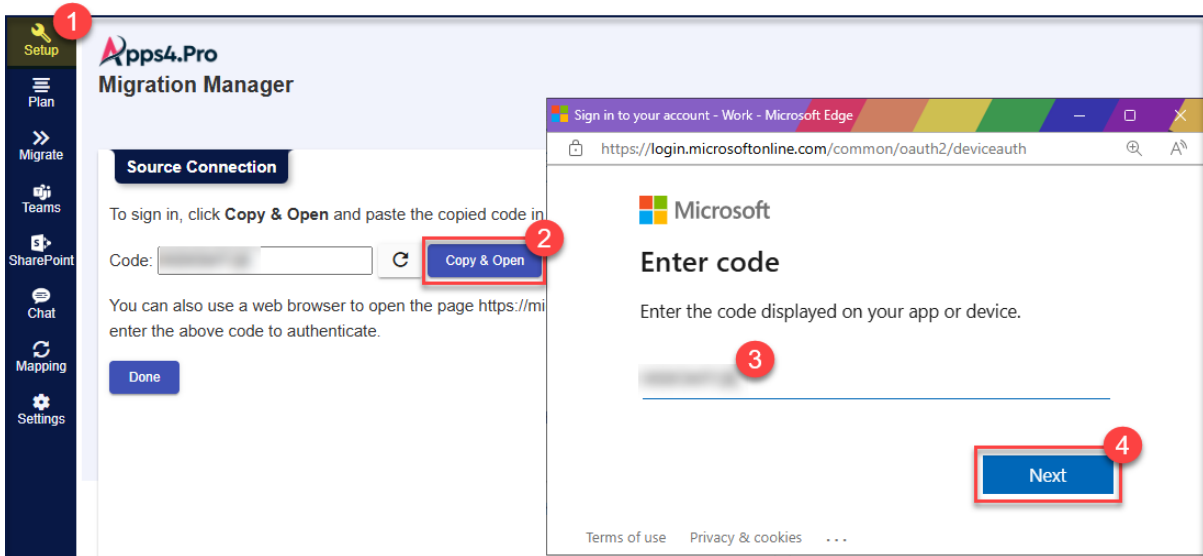
Admins can provide consent and delegate Permissions for Apps4.Pro Migration Manager app just by clicking a link or via simple script. Please contact support@jijitechnologies.com for further details.

Note : When a Global Admin performs the Migrations in App4.Pro tool, consent or permissions will not be required.

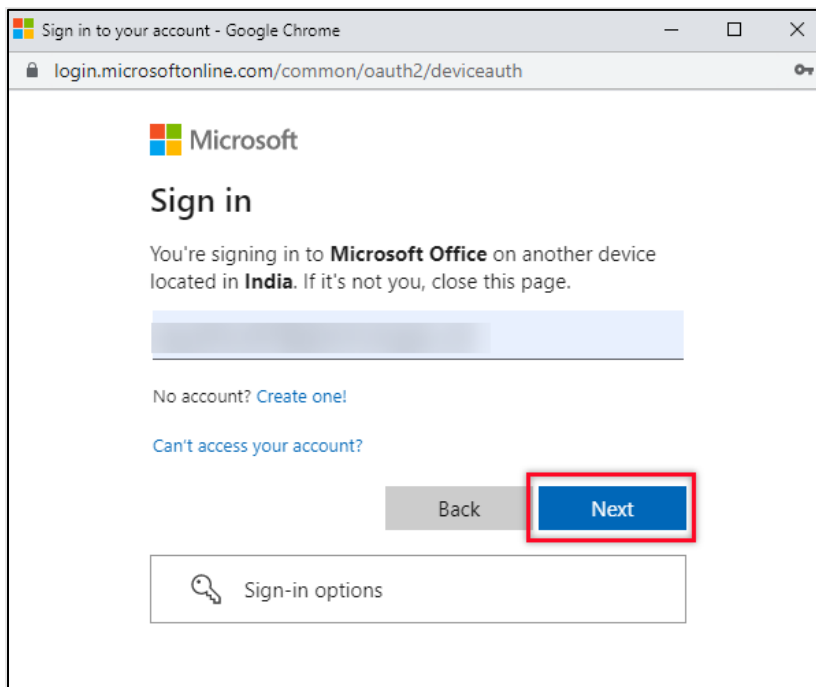
Step 3 : Global Configuration

Source Connector Account – Sign-in

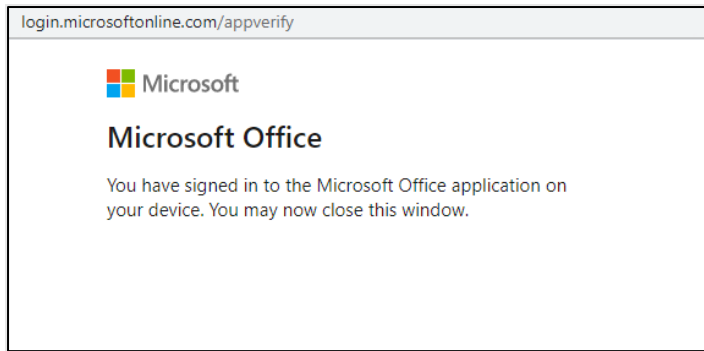
Establish a connection with the source connector account, by signing-in through the migration app. To do this, Go to Setup tab, under Source Connection - click on **Copy & Open** button and paste the copied code in the authentication window.



Now key in the source connector account details

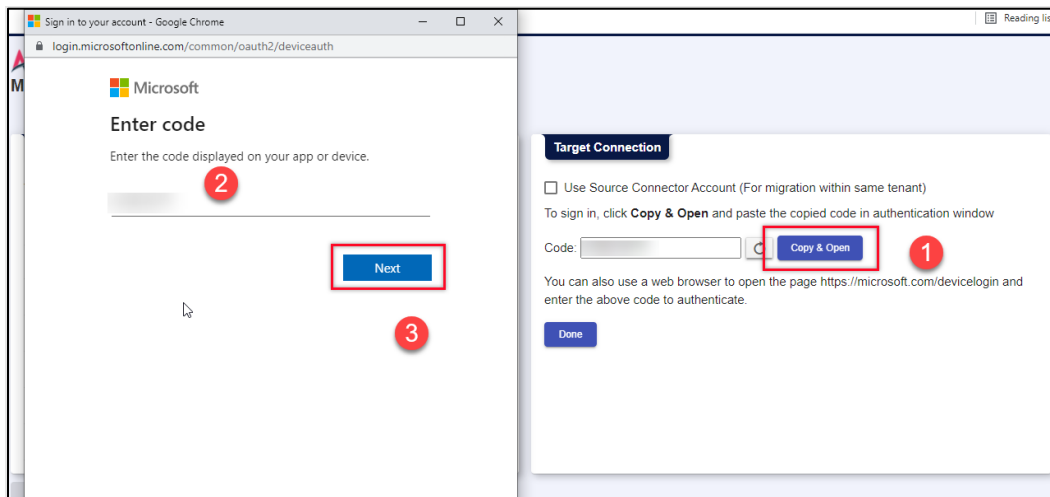


Once the sign in is completed, the below window will appear. Close this window and proceed.

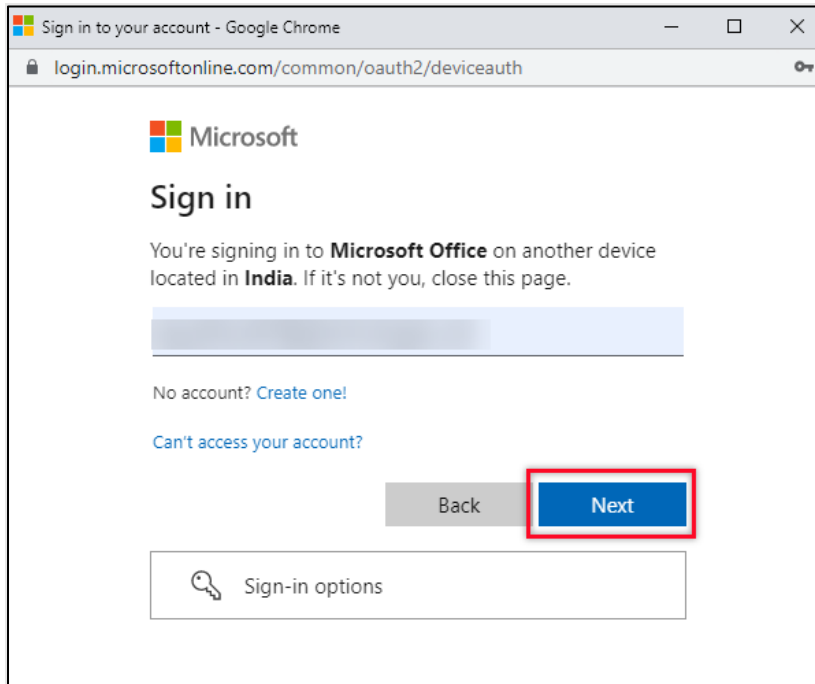


Target Connector Account – Sign-in

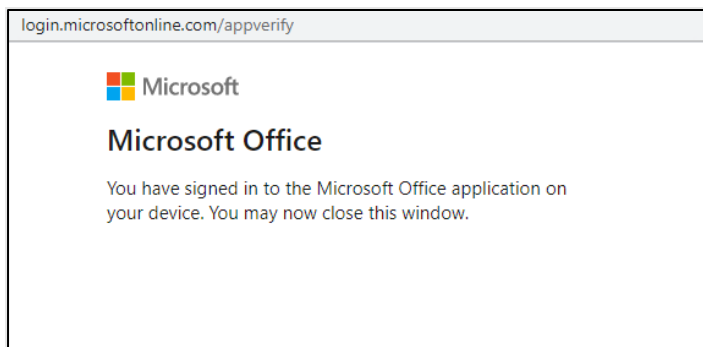
Establish a connection with the target connector account, by signing-in through the migration app. To do this, Go to Setup tab, under Target Connection - click on **Copy & Open** button and paste the copied code in the authentication window.



Now key in the target connector account details



Once the sign in is completed, the below window will appear. Close this window and proceed.

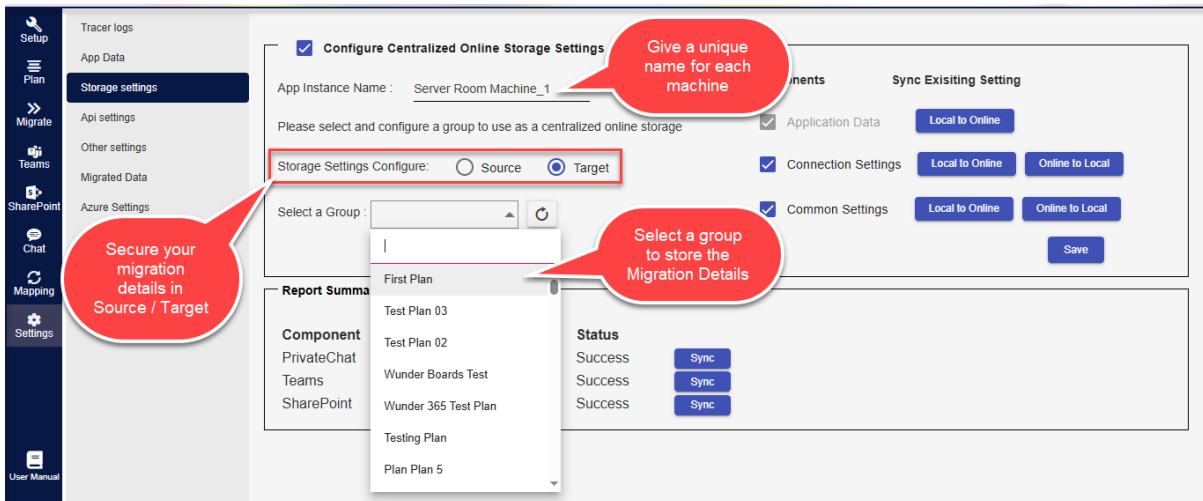


Storage Settings

For the below workloads, the tool supports parallel migration : which means we can run multiple tasks simultaneously across various machines.

- SharePoint Migration
- Microsoft Teams Migration
- Private Chat Migration

You have to configure few settings as shown below, in order to avoid duplication of migration data during such parallel migrations.



App Instance Name : Provide a unique for each machine where the migration tasks are executed.

Application Data : This option is selected by default and cannot be modified. This denotes the migration data which are stored in the SharePoint site of the chosen Group.

Connection Settings : You can choose to save the Connection settings – the Source & Target Connector setup information, to avoid re-entering the same information across machines.

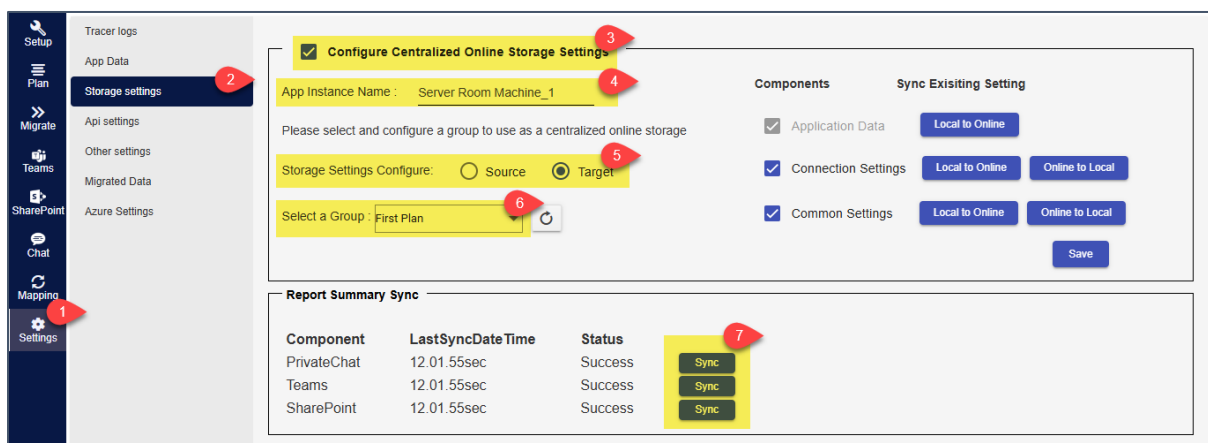
Common Settings: You can choose to save the settings data, in order to use the same settings(Users Mapping, Api settings & Other settings) across machines.

Report Summary Sync : You can summarize your migration runs across various instances using this ‘Sync’ option provided here for the below workloads.

- Private Chat Migration
- Teams Migration
- SharePoint Migration

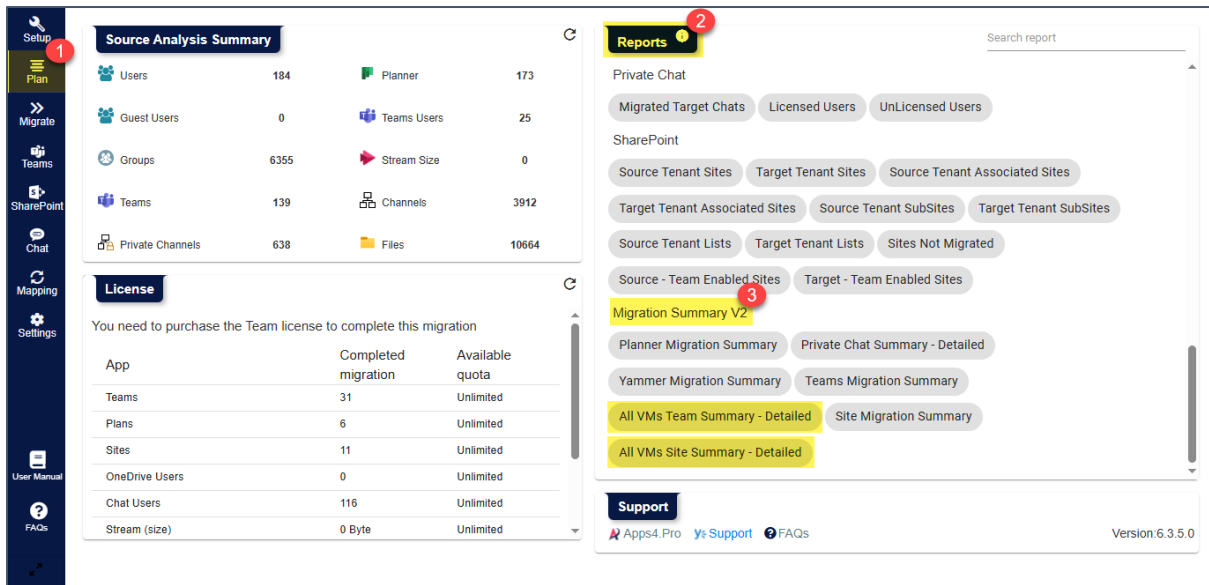
Remember to **choose the same Source / Target Group across all your machines** to make this working.

Recommendation : It is recommended to pick the Target Group to avoid the loss if in case the Source retires.



After the synchronisation has completed, navigate to Plan tab -> Report -> Migration Summary V2, you can view the ‘All VMs Summary - Detailed report’ across all the virtual machines .

Note : You can pull this Summary Report from any of the instance.

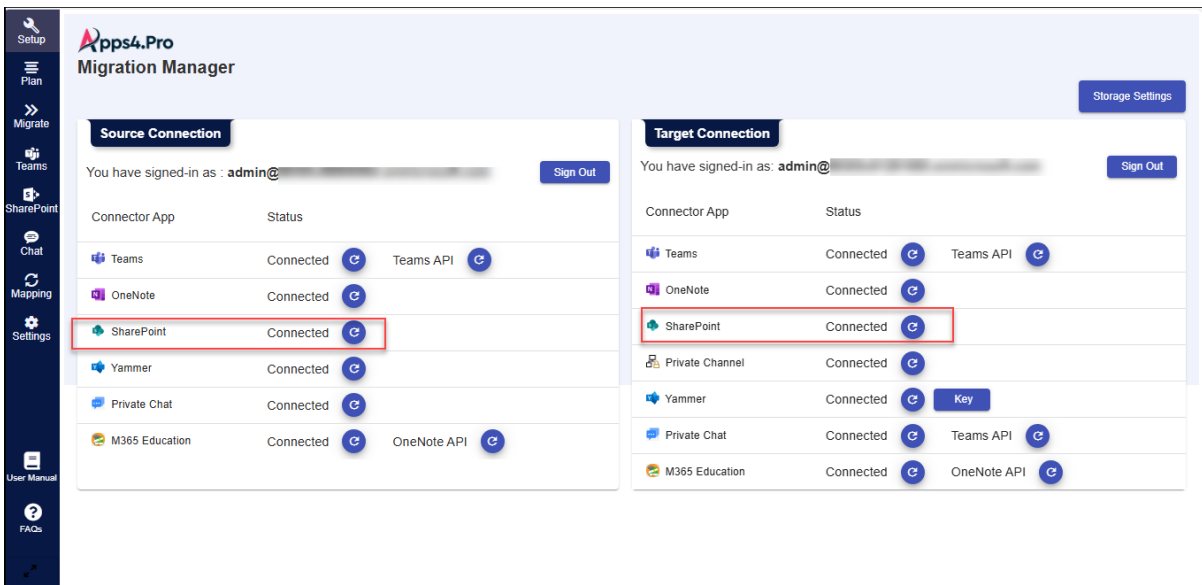


Step 4 : Additional Configurations

Apart from the Source & Target – Connector Account configurations, we may have to do some additional configurations based on the workloads we migrate.

SharePoint Migration

To migrate the SharePoint sites & content, we have to configure the SharePoint Source & Target Connectors.



Source & Target 'SharePoint' Permission

To Migrate the **SharePoint** sites, the tool needs the permissions for Source & Target as in below screenshot. Accept the permission to proceed.



admin@██

Permissions requested



PnP Management Shell

[App info](#)

This application is not published by Microsoft or your organization.

This app would like to:

- ✓ Read your chat messages
- ✓ Read your organization's policies
- ✓ Read and write to all app catalogs
- ✓ Invite guest users to the organization
- ✓ Read all usage reports
- ✓ Read and write all groups
- ✓ Read and write directory data
- ✓ Access the directory as you
- ✓ Read and write access to your mail
- ✓ Send mail as you
- ✓ Read and write identity providers
- ✓ Send channel messages

- ✓ Access the directory as you
- ✓ Read and write access to your mail
- ✓ Send mail as you
- ✓ Read and write identity providers
- ✓ Send channel messages
- ✓ Manage all Teams apps
- ✓ Read and write tabs in Microsoft Teams.
- ✓ Read and write the names, descriptions, and settings of channels
- ✓ Read and change teams' settings
- ✓ Add and remove members from teams and channels
- ✓ Add and remove members from teams and channels
- ✓ Read your channel messages
- ✓ Manage your installed Teams apps
- ✓ Create teams
- ✓ Read service messages

- ✓ Create, read, update, and delete user's tasks and task lists
- ✓ Read and write managed metadata
- ✓ Have full control of all site collections
- ✓ Read and write user profiles
- ✓ Read service health information for your organization
- ✓ Read activity data for your organization
- ✓ Access the directory as the signed-in user
- ✓ Access Azure Service Management as organization users (preview)
- Consent on behalf of your organization

If you accept, this app will get access to the specified resources for all users in your organization. No one else will be prompted to review these permissions.

Accepting these permissions means that you allow this app to use your data as specified in their terms of service and privacy statement. **The publisher has not provided links to their terms for you to review.** You can change these permissions at <https://myapps.microsoft.com>. [Show details](#)

Does this app look suspicious? [Report it here](#)

Cancel Accept

Teams Migration

If you want to migrate Team Conversations, OneNote, Private Channels, Shared Channels & Class Assignments (only for an education tenant) between the tenants, configure the respective Source & Target Connectors.

In addition to **Teams** Source & Target Connectors,

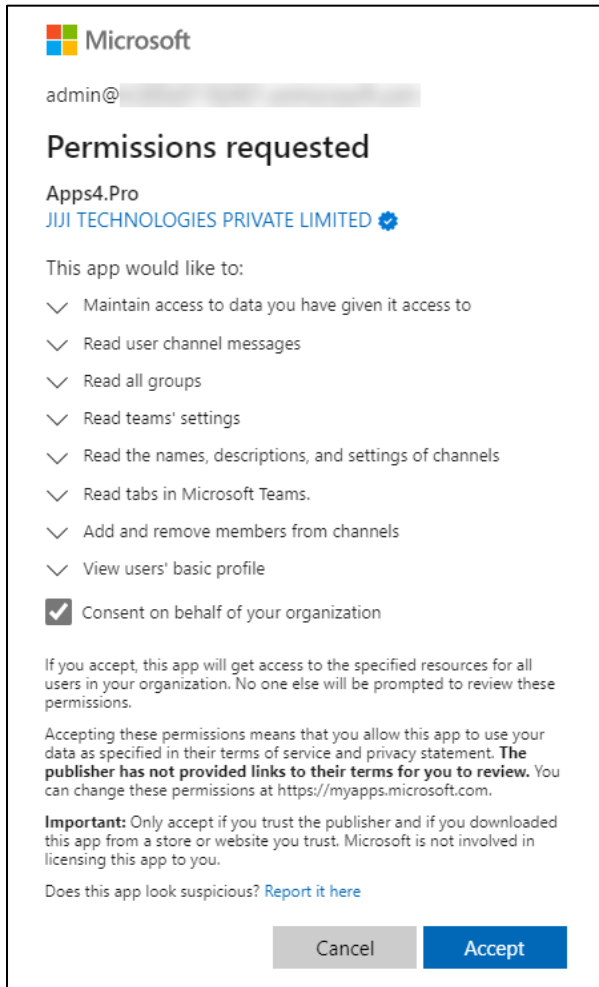
- To migrate **OneNote tabs**, configure the **OneNote** Source & Target Connectors.
- To migrate **Private Channels**, configure the **Private Channel** Target Connector.
- To migrate **an Education Tenant**, configure the **M365 Education** Source & Target Connectors also.

The screenshot shows the 'Migration Manager' interface with two panels: 'Source Connection' and 'Target Connection'. Both panels show a list of connector apps and their status. Red boxes highlight the following connectors in both panels:

Connector App	Status
Teams	Connected
OneNote	Connected
SharePoint	Connected
Private Channel	Connected
M365 Education	Connected

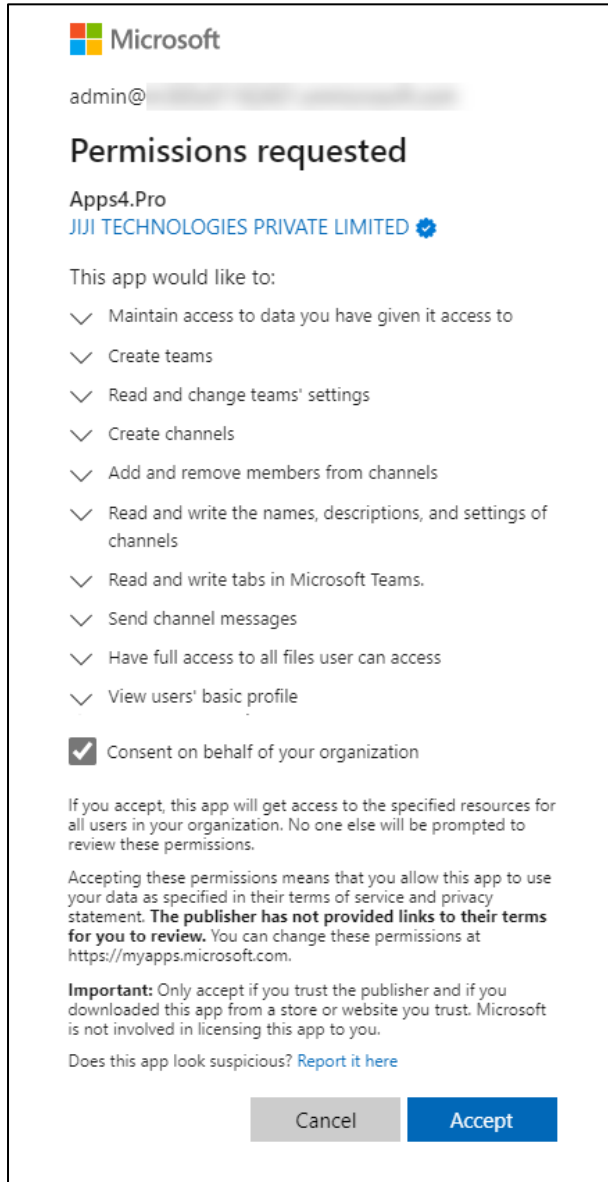
1. Source **Teams** Permission

To Migrate the **Teams**, the tool needs the permissions for Source as in below screenshot. Accept the permission to proceed.



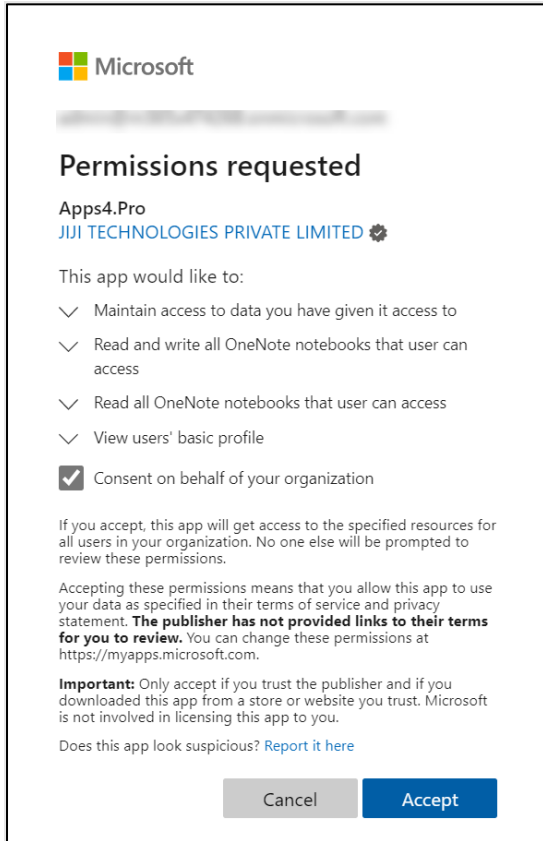
2. Target 'Teams' Permission

To Migrate the **Teams**, the tool needs the permissions for Target as in below screenshot. Accept the permission to proceed.



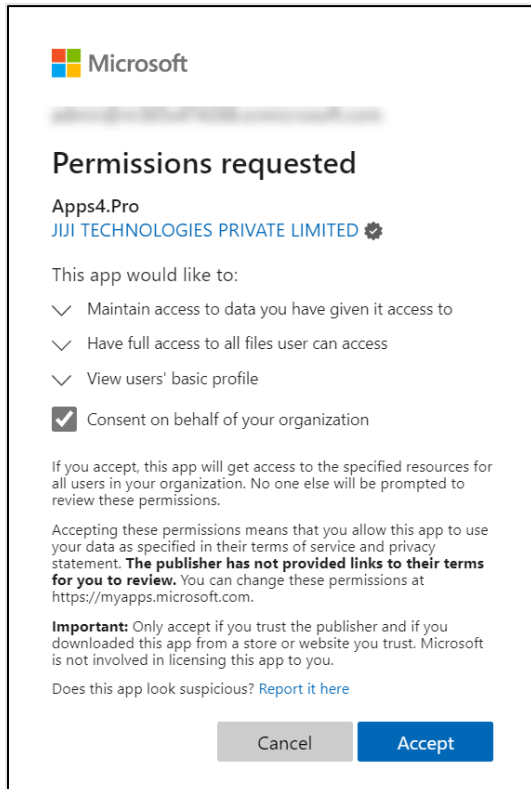
3. Source & Target 'OneNote' Permission

To Migrate the **OneNote**, the tool needs the permissions for Source & Target as in below screenshot. Accept the permission to proceed.




4. Target 'Private Channel' Permission

The tool needs permission from the target tenant to perform the Private channel migration. Accept the permission to proceed and complete the sign in.



5. Source & Target 'M365 Education' Permission

The tool needs permission from the source & target tenants to perform the Education Tenant's Assignment Migration. Accept the permission to proceed and complete the sign in.



admin@

Permissions requested

Apps4.Pro
JJI TECHNOLOGIES PRIVATE LIMITED

This app would like to:

- ✓ Maintain access to data you have given it access to
- ✓ Read users' class assignments and their grades
- ✓ Read users' class assignments without grades
- ✓ Read and write users' class assignments and their grades
- ✓ Read and write users' class assignments without grades
- ✓ Read a limited subset of users' view of the roster
- ✓ Have full access to all files user can access
- ✓ View users' basic profile
- Consent on behalf of your organization

If you accept, this app will get access to the specified resources for all users in your organization. No one else will be prompted to review these permissions.

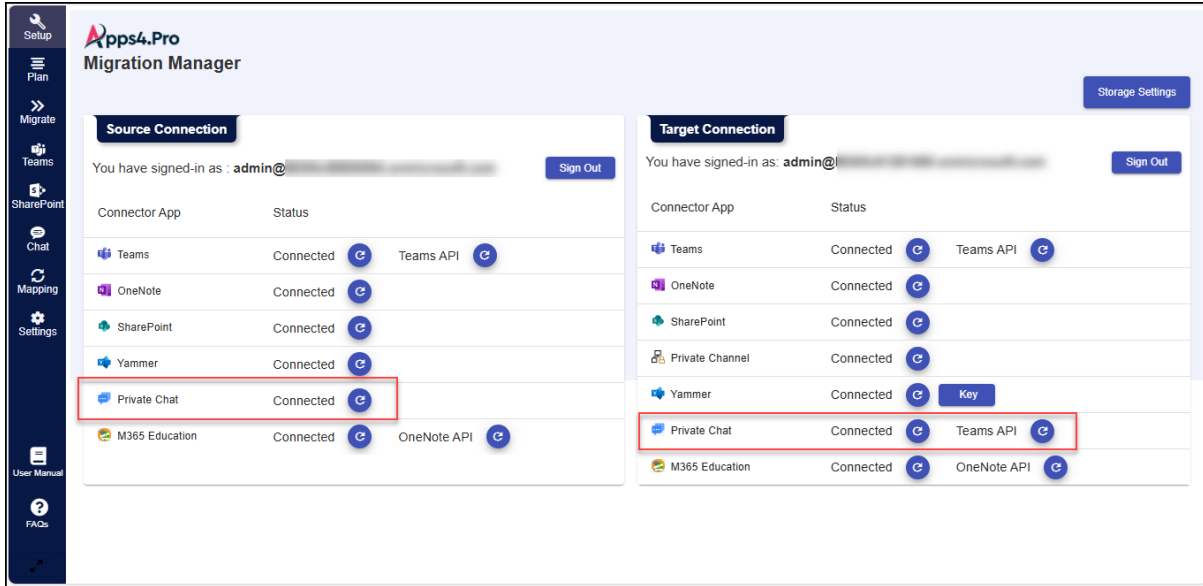
Accepting these permissions means that you allow this app to use your data as specified in their terms of service and privacy statement. **The publisher has not provided links to their terms for you to review.** You can change these permissions at <https://myapps.microsoft.com>.

Important: Only accept if you trust the publisher and if you downloaded this app from a store or website you trust. Microsoft is not involved in licensing this app to you.

Does this app look suspicious? [Report it here](#)

Private Chat Migration

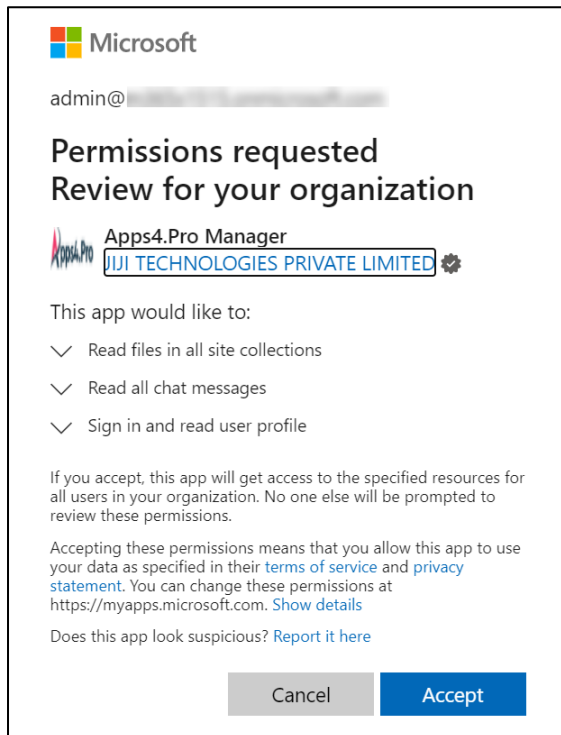
To migrate the private chats, we have to configure the Private Chat Source & Target Connectors, also the Teams API for the Target Connector.



Private Chat Connector Permission

The tool needs permission from the source & target tenants to perform the Private chat migration. Accept the permissions to proceed and complete the sign in.

Source



Target

admin@

Permissions requested

Apps4.Pro
JIJI TECHNOLOGIES PRIVATE LIMITED

This app would like to:

- Have full access to all files user can access
- Maintain access to data you have given it access to
- View users' basic profile
- Read and write user chat messages
- Consent on behalf of your organization

If you accept, this app will get access to the specified resources for all users in your organization. No one else will be prompted to review these permissions.

Accepting these permissions means that you allow this app to use your data as specified in their terms of service and privacy statement. **The publisher has not provided links to their terms for you to review.** You can change these permissions at <https://myapps.microsoft.com>.

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Does this app look suspicious? [Report it here](#)

Viva Engage (Yammer) Migration

To migrate the Viva Engage(Yammer) Networks, we have to configure the Viva Engage(Yammer) Source & Target Connectors and also, we have to configure the Key.

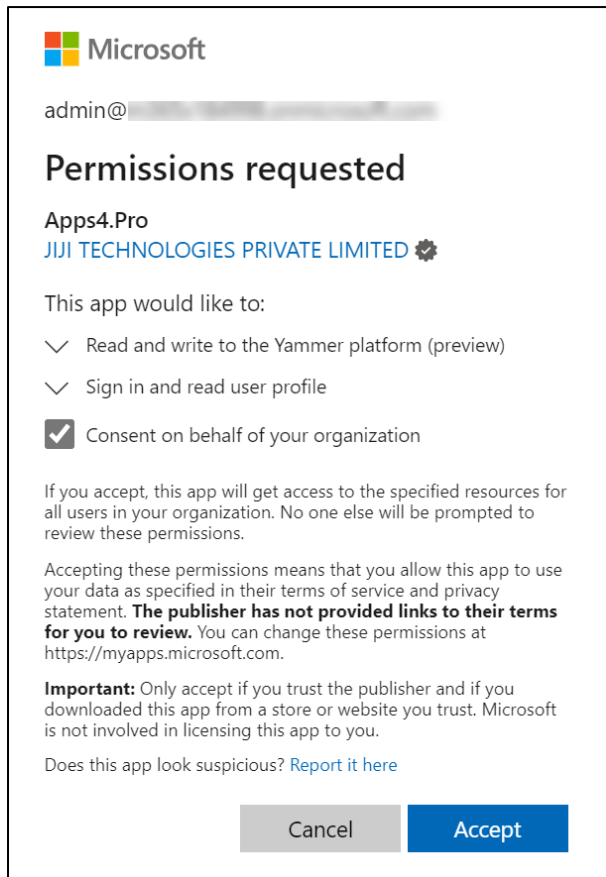
The screenshot shows the 'Migration Manager' interface with two panels: 'Source Connection' and 'Target Connection'. Both panels show a list of connector apps and their status. In the 'Source Connection' panel, the 'Yammer' connector is highlighted with a red box. In the 'Target Connection' panel, the 'Yammer' connector is also highlighted with a red box, and a 'Key' button is visible next to it.

Connector App	Status
Teams	Connected
OneNote	Connected
SharePoint	Connected
Yammer	Connected
Private Chat	Connected
M365 Education	Connected

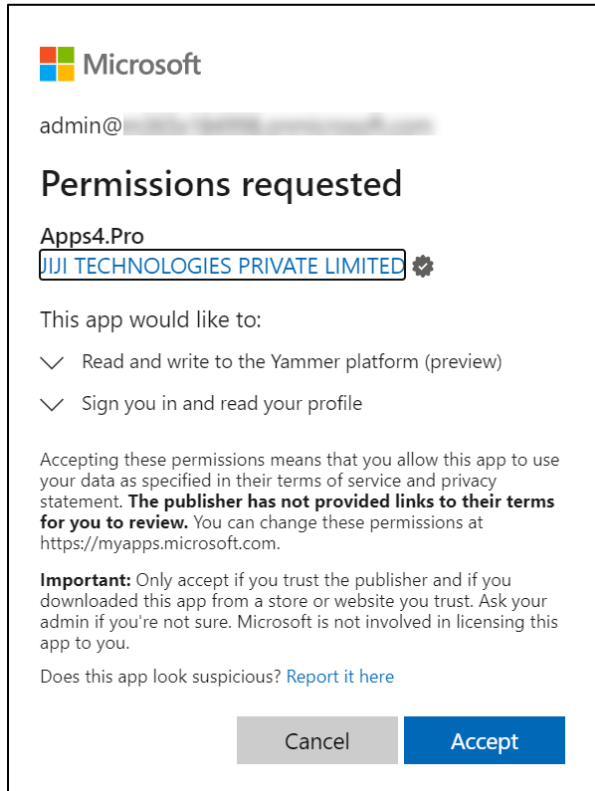
Viva Engage(Yammer) Connector Permission

The tool needs permission from the source & target tenants to perform the Viva Engage (Yammer) Migration. Accept the permissions to proceed and complete the sign in.

Source



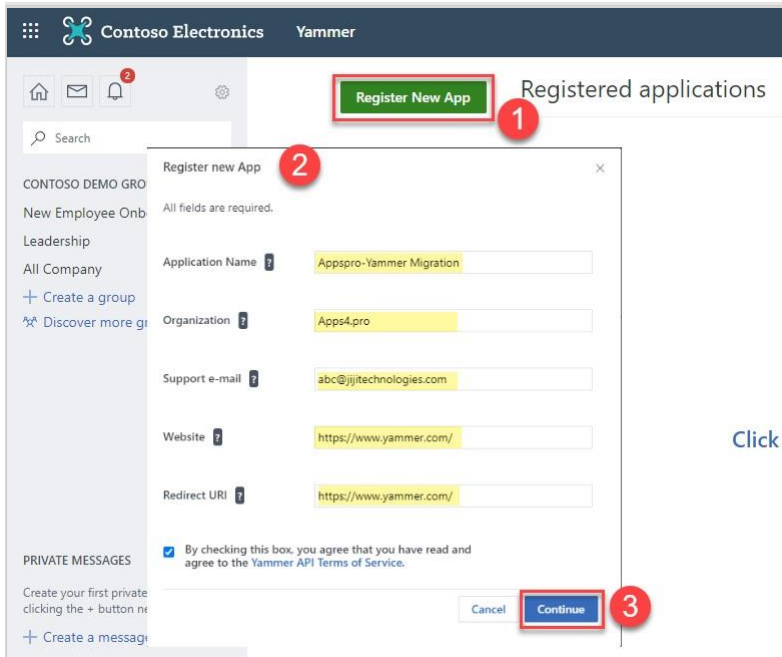
Target



Steps to get Consumer Key (Client ID) from Target Tenant Viva Engage(Yammer) Portal

Once you configure the Target Viva Engage(Yammer) Connection, Sign-in to the Viva Engage(Yammer) Client Applications page (https://www.yammer.com/client_applications) with your Target Connector Account.

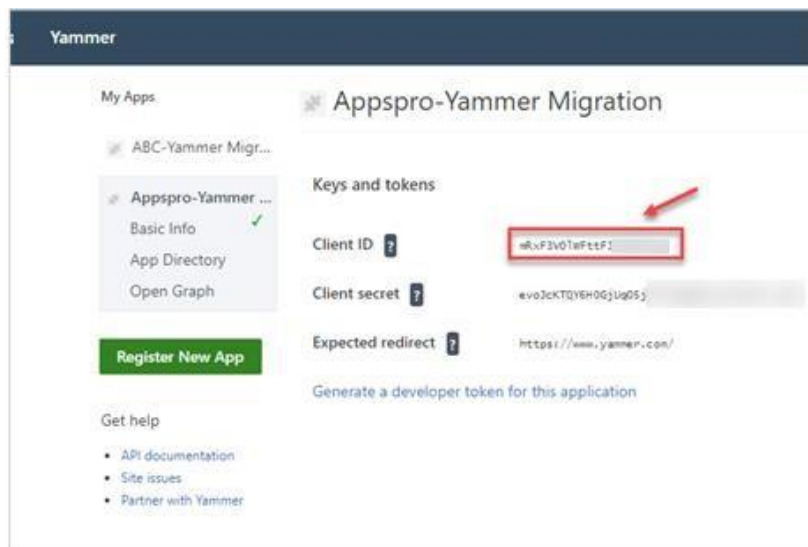
Once logged into the Viva Engage(Yammer) Application page, Click on 'Register New App', fill all the required fields and then click Continue.



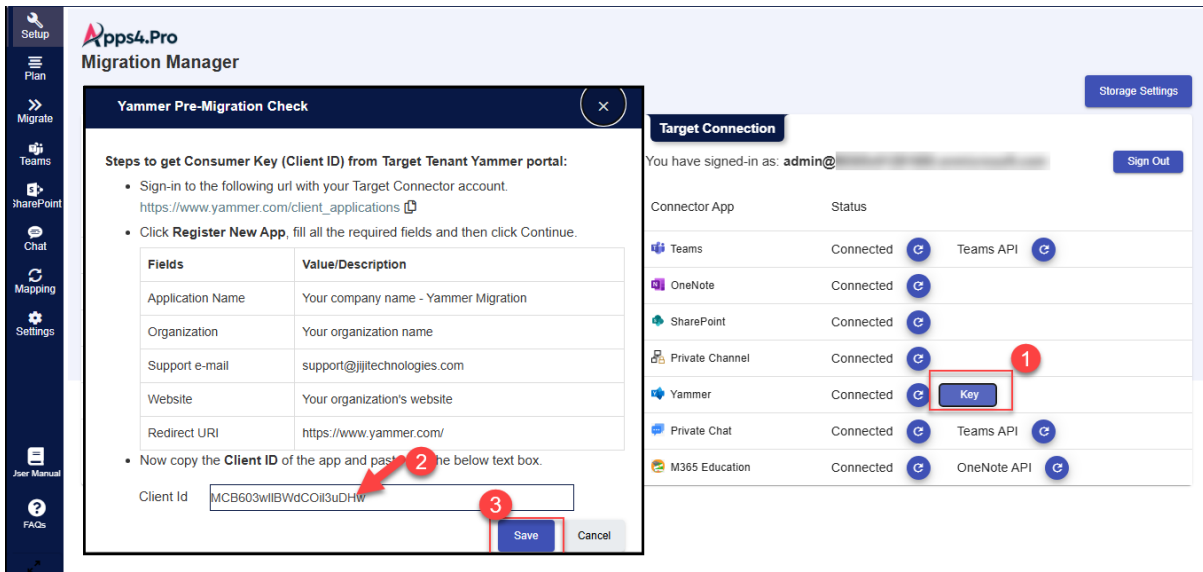
Refer the format as shown in the below table to fill the information in Step 2.

Fields	Value/Description
Application Name	Your company name - Yammer Migration
Organization	Your organization name
Support e-mail	support@jijitechnologies.com
Website	Your organization's website
Redirect URI	https://www.yammer.com/

Now copy the Client ID of the app.



Go to Apps4.Pro Migration manager and click on *the key* button which is beside the Target Viva Engage(Yammer) Connection. Paste the client Id on the text box and save the settings.



Step 5 : Application Tenant Data Refresh

Perform an Application Data Refresh **before you start with any Migration** for both the source and target connectors in the **“Settings -> App Data”**.

Note : By downloading the source and target users, you can very well frame the Application level Users / Groups Mapping.

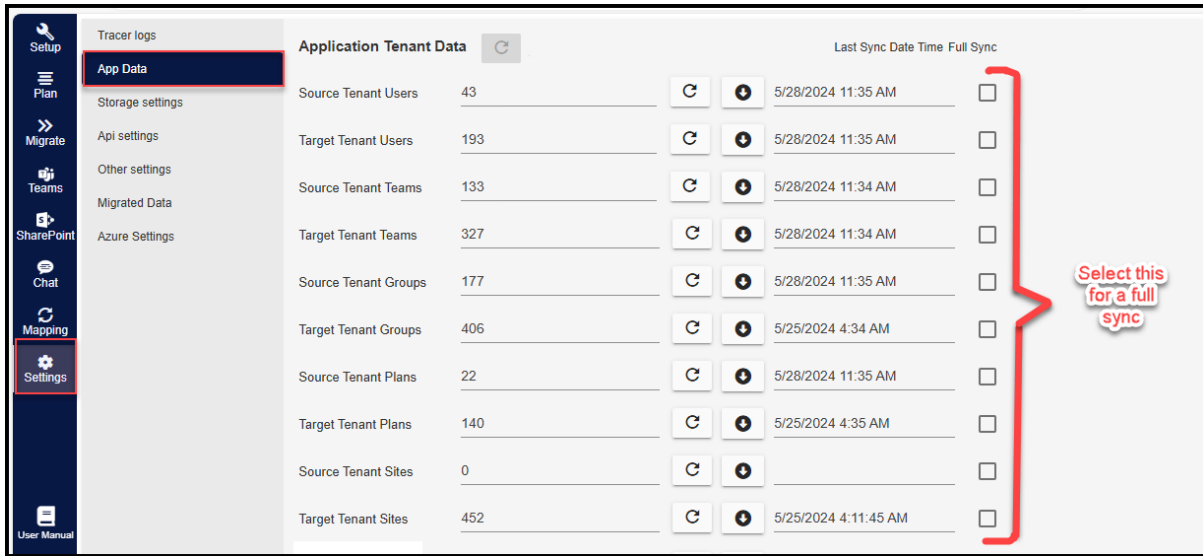
- a. Groups
- b. Users
- c. Teams
- d. Plans
- e. SharePoint Sites

If you wish to perform a clean refresh of a particular workload, select the checkbox next to it. If it is unselected, it performs an incremental refresh from the last time it was refreshed. You could also find the time when the data was previously refreshed here.

The data shown here depends on the below criteria.

- ✓ If the Source/Target connector **is an admin**, you will see the tenant-wise data here.
- ✓ If the Source/Target Connector is **not an admin**, you will see the count of groups / teams / plans you are member of.

Note : The **count of users** reflects the tenant-wise data, irrespective of the connector’s role.



Step 6 : Users Mapping

Application User Mapping

The users in the source and target tenant needs to be mapped, so the app will get the intelligence to leverage the same during migration.

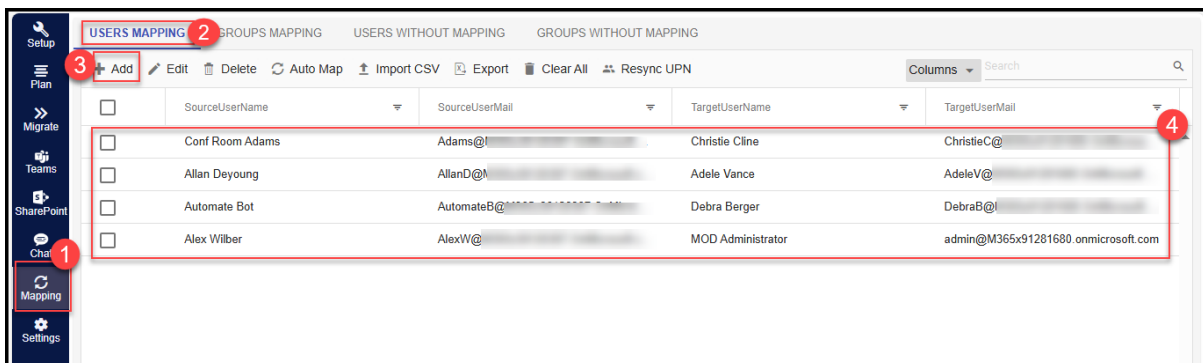
To perform this, go to “Mapping” tab -> USERS MAPPING.

Add the users mapping manually using the option “Add”

(OR) Download the sample, add the user mappings & import them using the option “Import CSV”.

[You can](#) download the tenant-level users to frame the Mapping CSV, [please refer to Application Tenant Data Refresh](#).

Note : Using the “Clear All” option you can clear the previously added mappings in a single shot.



Sample CSV File

SourceTenantUserId	TargetTenantUserId
alex@testdomain.com	alex@contoso.com
allan@testdomain.com	allan@contoso.com
debra@testdomain.com	debra@contoso.com
megan@testdomain.com	megan@contoso.com

Users Without Mapping

You can add the users whose membership need not be migrated to target.

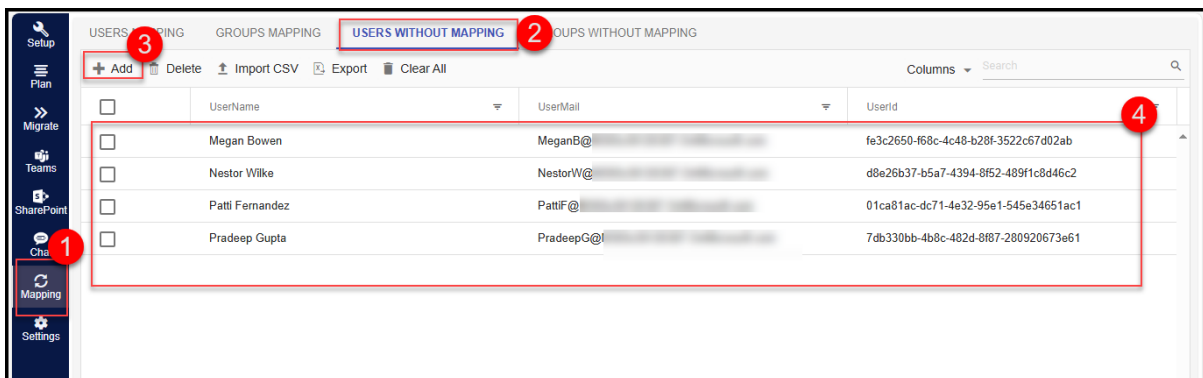
The tool skips the users and do not throw an error, when added here.

To perform this, go to **“Mapping” tab -> USERS WITHOUT MAPPING**.

Add the users mapping manually using the option **“Add User”**

(OR) Add the User Mail & IDs in a CSV, and import them using the option **“Import CSV”**.

Note : Using the **“Clear All”** option you can clear the previously added mappings in a single shot.



Sample CSV File

SourceTenantUserMail	SourceTenantUserId
alex@testdomain.com	eeb793ab-3667-6927-f212-05f16de3dba9
allan@testdomain.com	f257b3a9-40d2-8ed5-ef7d-37930c166e88
debra@testdomain.com	2f31e463-3762-65c8-cfa5-54f396d7bfbe
megan@testdomain.com	38737ef2-7b08-918f-e57b-967435bad1aa

Step 7 : Re-sync User Domains Post Cut-Over

This STEP has to be performed post the cut-over date.

If the Source / Target is likely a New Tenant, your domain changes post cut-over. The tool picks up the new User Domains automatically post cut-over. Please follow the below steps.

- 1) Perform an Application Tenant Data Refresh for both the source and target connectors. Refer [Application Tenant Data Refresh](#).
- 2) Post the cut-over date, Click on Mapping -> USERS MAPPING -> Resync UPN.

This helps the tool to re-sync the users with the new Domains.

	SourceUserName	SourceUserMail	TargetUserName	TargetUserMail
<input type="checkbox"/>	MOD Administrator	dinesh@	MOD Administrator	TestUser01@
<input type="checkbox"/>	Dyno.Dinesh	dyno.dinesh@	Dyno Dinesh	dyno.dinesh@r
<input type="checkbox"/>	Demo User 00100	demouser100@	Demo User 00100	demouser100@r
<input type="checkbox"/>	Gill Sara	GillSara@	Gill Sara	GillSara@r
<input type="checkbox"/>	Diego Siciliani	DiegoS@r	Diego Siciliani	DiegoS@
<input type="checkbox"/>	Grady Archie	GradyA@r	Grady Archie	GradyA@r
<input type="checkbox"/>	Henrietta Mueller	HenriettaM@r	Henrietta Mueller	HenriettaM@r

1. SharePoint Migration

Step 1 : Setup & Configuration

Setup : License and Roles

1. **Microsoft 365/Office 365(E3 or E5) License** is required for Source & Target Connector Accounts.
2. **SharePoint license** is required for Source & Target Connector Accounts.
3. **SharePoint Administrator role with Admin Consent and Delegated Permission** is required for Source & Target Connector Accounts.
4. To migrate Global level term group :
 - o **Term Store Administrator** role is required for Source & Target Connector Accounts
 - o “Migrate Global Term Groups” setting has to be enabled. Please refer [Migrate Global Term Groups Settings](#).
5. **Source Connector Account** should be a ‘**Site Admin**’ of the Sites that you chose to migrate.

Admin Consent & Delegate Permission : For non-Global Administrators

Admin must provide Admin Consent & Delegate Permission by executing a simple script. Please contact support@jijitechnologies.com for further details.

Configuration : Connector Accounts – Sign-in

Perform the Source & Target Connector Accounts Sign-in as shown in *Global Configuration section*.

Additional Configuration : Additional Connector Accounts – Sign-in

Perform the additional Source & Target Accounts Sign-in as shown in *Additional Configuration section*.

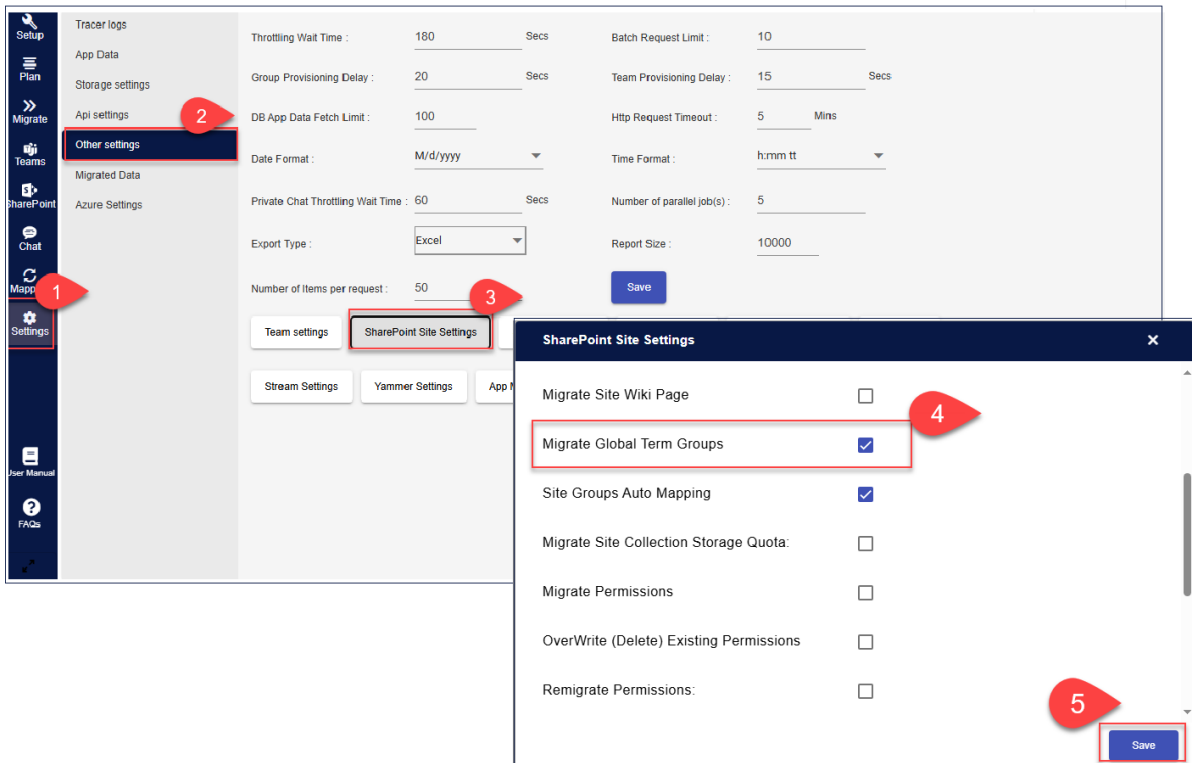
Mapping : Application User Mapping

Perform the Application-level User Mapping as shown in *Application User Mapping section*.

Step 2 : Additional Settings

1. Migrate Global Term Groups Settings

To get the Global Term Groups migrated, enable the flag ‘Migrate Global Term Groups’ from Settings -> Other Settings -> SharePoint Site Settings. **This has to be done before you initiate the migration.**



2. Application Groups Mapping

The groups in the source and target tenant needs to be mapped, to get the group-level unique permissions of a SharePoint site to be migrated successfully.

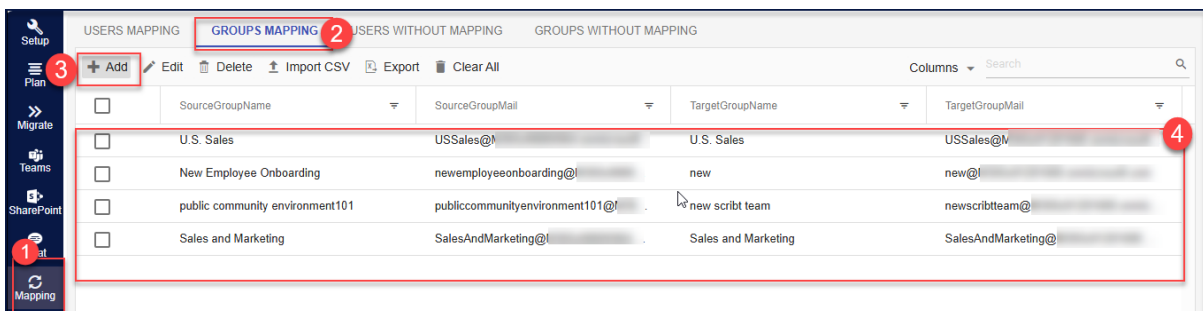
To perform this, go to “Mapping” tab -> GROUPS MAPPING.

Add the groups mapping manually using the option “Add”

(OR) Download the sample, add the group mappings & import them using the option “Import CSV”.

[You can](#) download the tenant-level Groups to frame the Mapping CSV, [please refer to Application Tenant Data Refresh.](#)

Note : Using the “Clear All” option you can clear the previously added mappings in a single shot.



Sample CSV File

SourceTenantGroupId	TargetTenantGroupId
allcompany@testdomain.com	allcompany@contoso.com
allgroup@testdomain.com	allchannels@contoso.com
Communications@testdomain.com	Communications592@contoso.com
Contoso@testdomain.com	cusers@contoso.com
SalesAndMarketing@testdomain.com	SalesAndMarketing@contoso.com
SOCTeam@testdomain.com	Securitygrouptest1@contoso.com

3. Groups Without Mapping

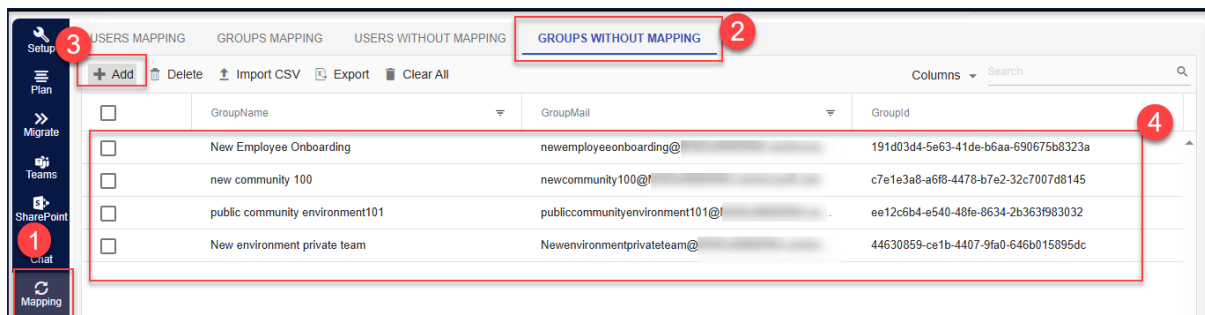
You can add the groups whose membership need not be migrated to target. The tool skips the groups and do not throw an error, when added here.

To perform this, go to **“Mapping” tab -> GROUPS WITHOUT MAPPING**.

Add the groups mapping manually using the option **“Add”**

(OR) Download the sample, add the group mappings & import them using the option **“Import CSV”**.

Note : Using the **“Clear All”** option you can clear the previously added mappings in a single shot.



Sample CSV File

SourceGroupName	SourceGroupMail	SourceGroupId
Trello Test 17	TrelloGroup17@contoso.com	ba070b1e-8b8f-4f44-946f-7304f0d40d62
Trello	Trello555@contoso.com	c2f872bc-ad03-432c-9992-6c805657a7c3
Analysis	analysis@contoso.com	4918c791-3b78-4353-8ad2-41f2073bfe3b
First Group	firstgroup@contoso.com	f62ff3af-6b81-43f9-8836-65ae50927797

Note : Group Mails are sufficient to get them imported.

4. Skip “Migrate Permissions” during Initial Migration [OPTIONAL]

When you migrate the permissions in the first place, the site members will keep receiving notifications during the migration. In order to avoid these notifications, disable the option “Migrate Permissions” before the Initial Migration. It is Enabled by DEFAULT.

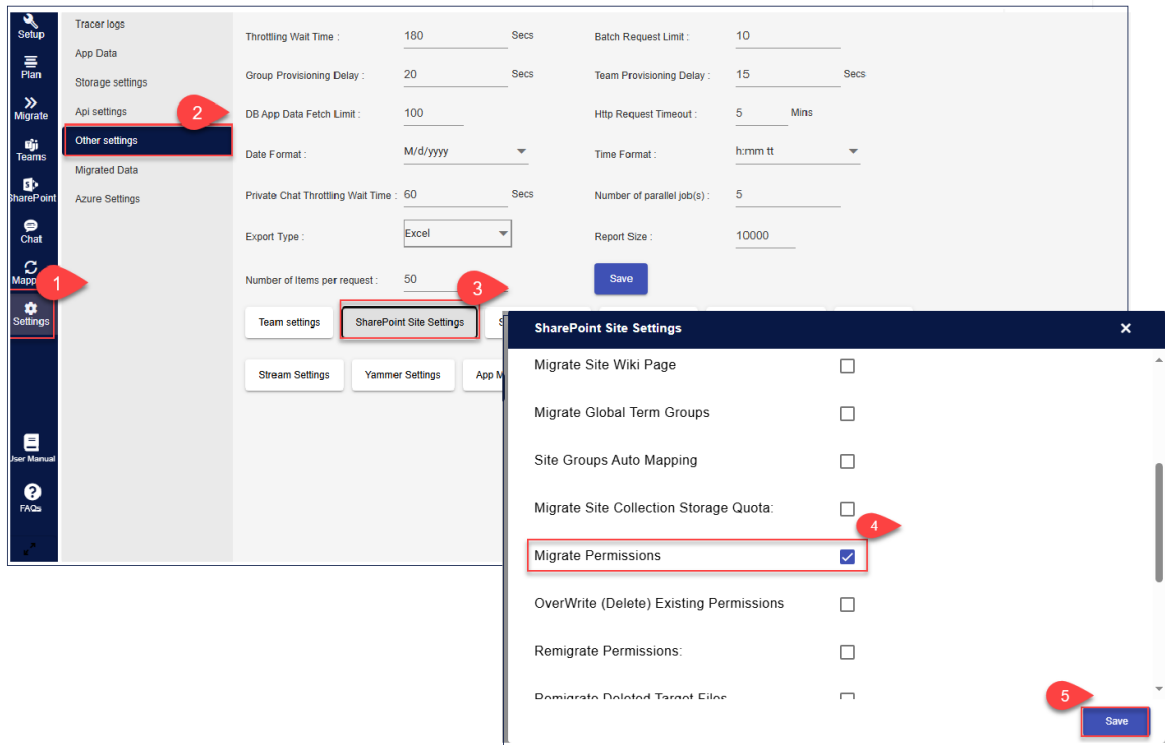
You can migrate the Permissions at a later point post the Migration is completed, by just

- Enabling the option “Migrate Permissions”

Post which, the Migration tasks require re-try.

Note : Disabling this setting, will skip migration of all the below levels of permissions

- ❖ Site Level Memberships
- ❖ Library Permissions
- ❖ List Permissions

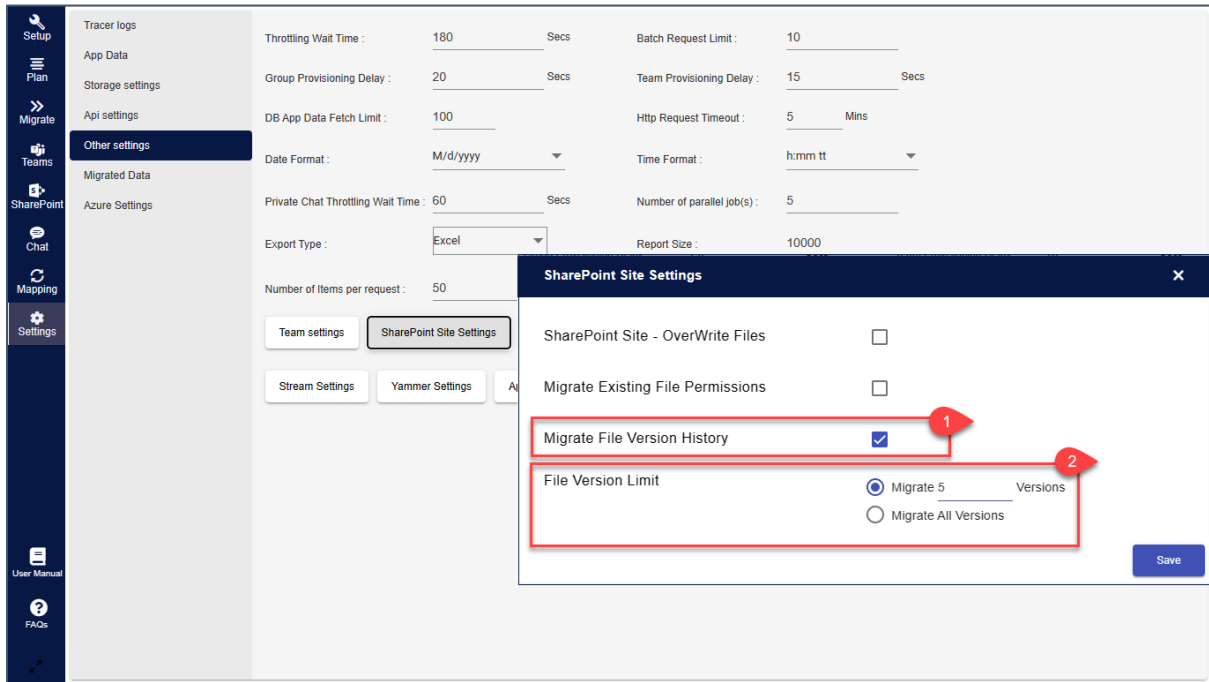


5. Enable “Migrate File Version History” **[RECOMMENDED]**

You can choose to migrate the file version history using this setting. If this is unselected, only the latest version of the file gets migrated. This is the recommended approach to speed up the Migration process as it migrated only the latest version of any file.

File Version Limit : If you still want to migrate the file versions, you could control the number of versions to be migrated using this setting.

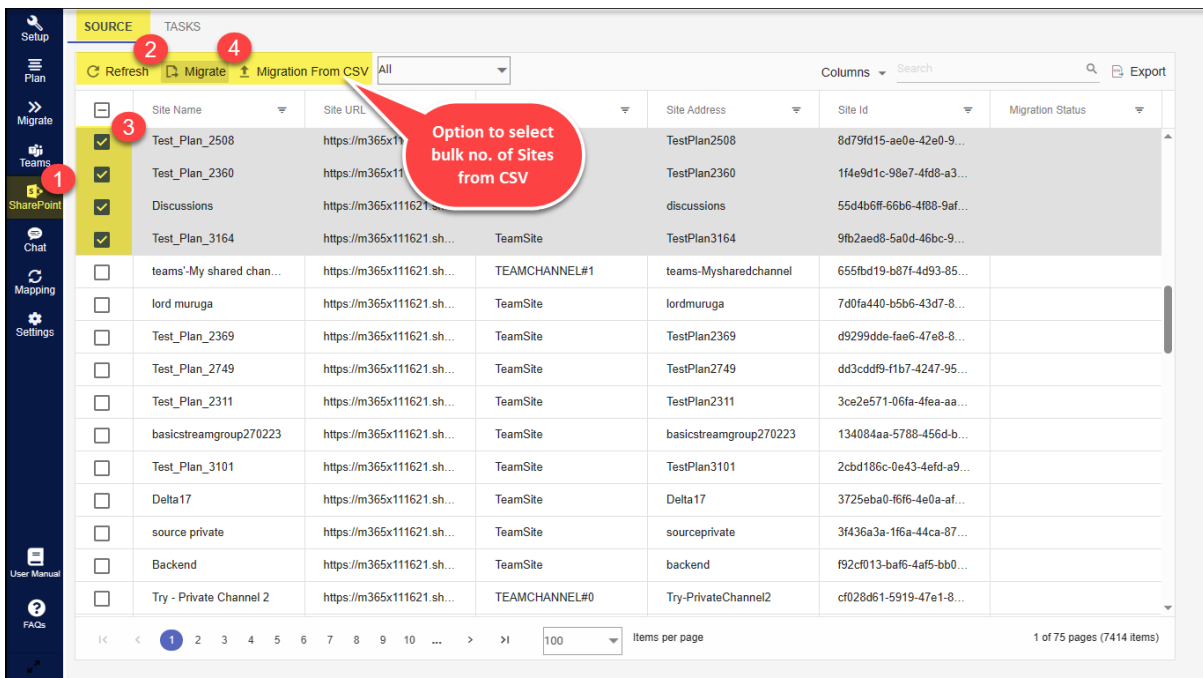
Please refer the below screenshot.



Step 3 : Create task

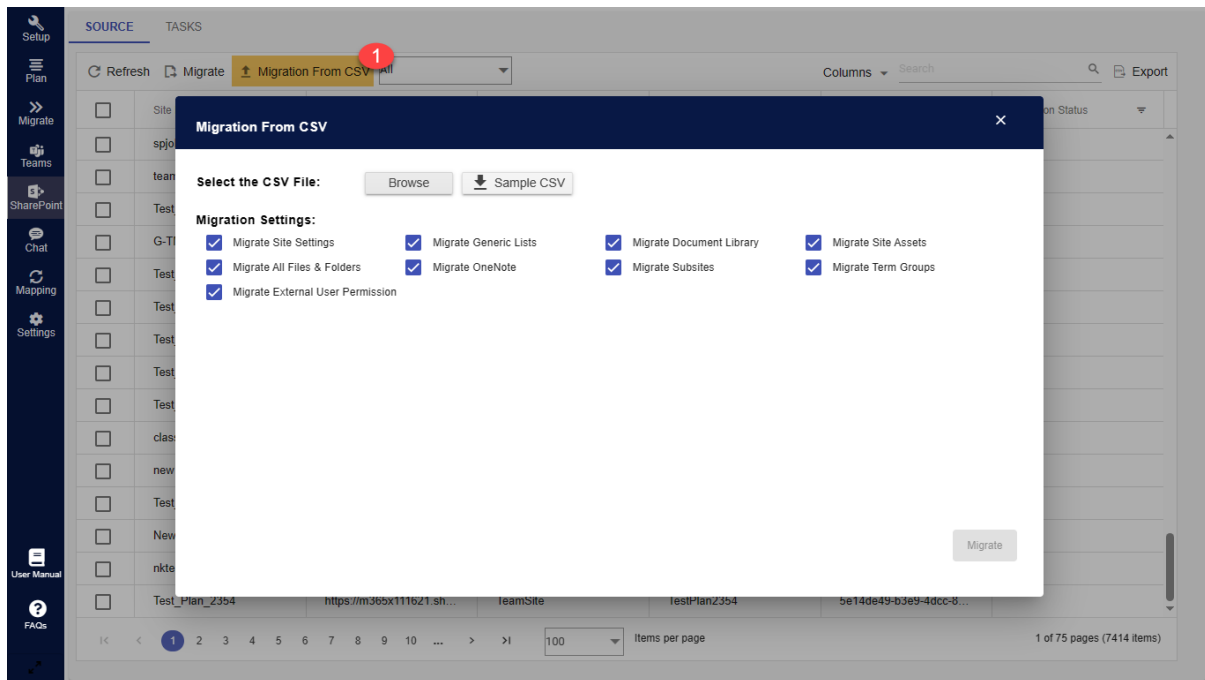
Follow the below steps to create a task

- 1) Navigate to 'SharePoint' tab.
- 2) Hit 'Refresh' to load the Sites.
- 3) Select the Sites you want to migrate.
- 4) Click **Migrate**.



Migration from CSV : Select a bunch of Sites in a single shot using this option.

You can **Browse** for a CSV containing the details of the Sites to be Migrated.



Sample CSV :

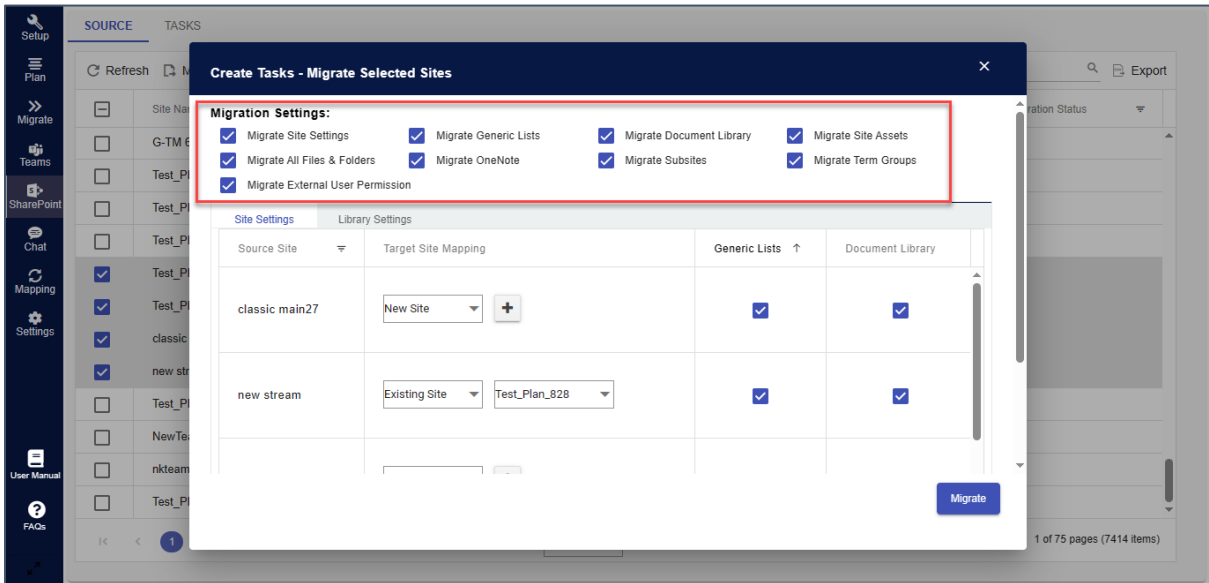
	A	B
1	Source Site Url	Target Site Url
2	https://[redacted].sharepoint.com/sites/AdminSite	https://[redacted].sharepoint.com/sites/admingrp1
3	https://[redacted].sharepoint.com/sites/Adminiteam	https://[redacted].sharepoint.com/sites/AdminSite
4	https://[redacted].sharepoint.com/sites/allcompany	https://[redacted].sharepoint.com/sites/AdminGrpTeam
5	https://[redacted].sharepoint.com/sites/analysis_test	https://[redacted].sharepoint.com/sites/adminportal

Note : When migrating as a new Site, the 'Target Site Url' column will be empty.

Step 4a : Select Other Options

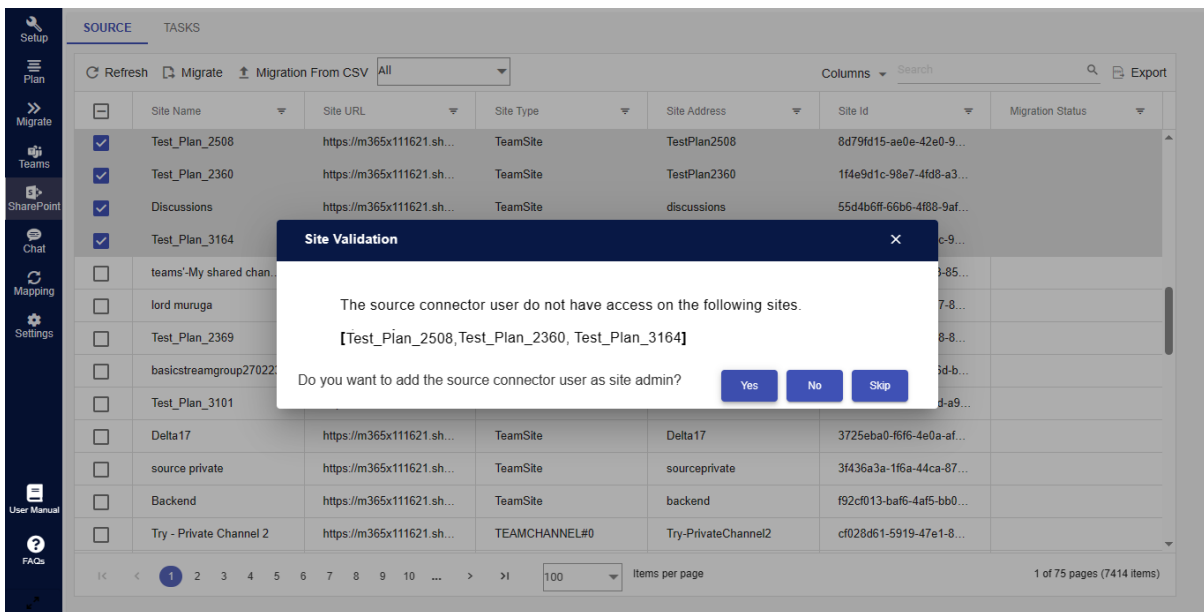
You can also choose the other options whether the SharePoint Migration to include Site Settings, Generic Lists, Document Libraries, Site Assets, All Files & Folders, OneNote, Subsites, Terms Groups and External User Permission.

Migrate External User Permission : When there are external site members who are yet to accept the invitation, enabling this option will migrate those users to the target sites by sharing an "Invitation to join the Target Site".



Add Source Connector as Site Admin : When the source connector account is not an admin of a site chosen for migration, the tool diligently provides an option to the user to add the account as admin to the site during the validation check. The user can choose to

- f. Skip that particular site and proceed with the migration of the rest of the sites OR
- g. Add the source connector as an admin to the chosen site and proceed with the migration

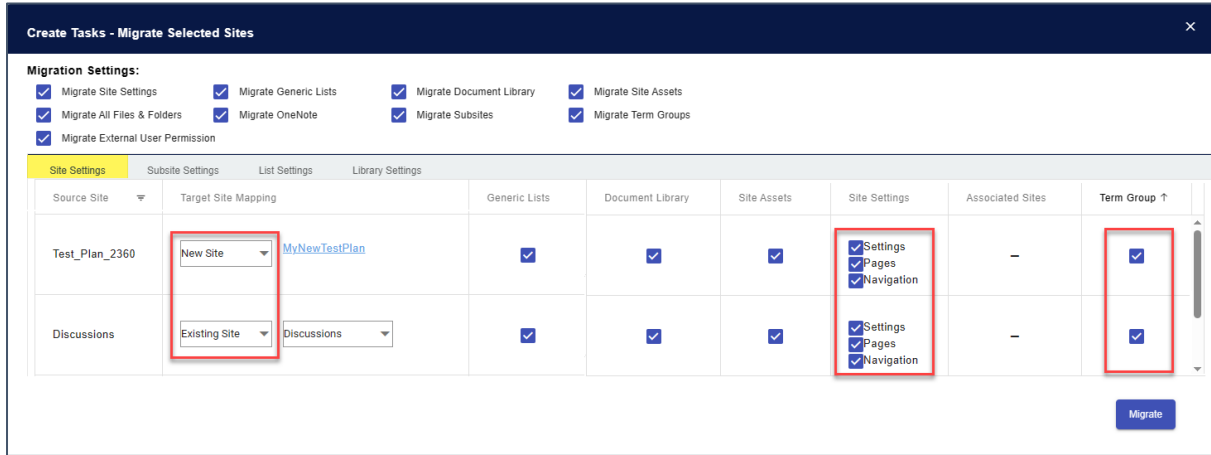


Step 4 : Target Settings

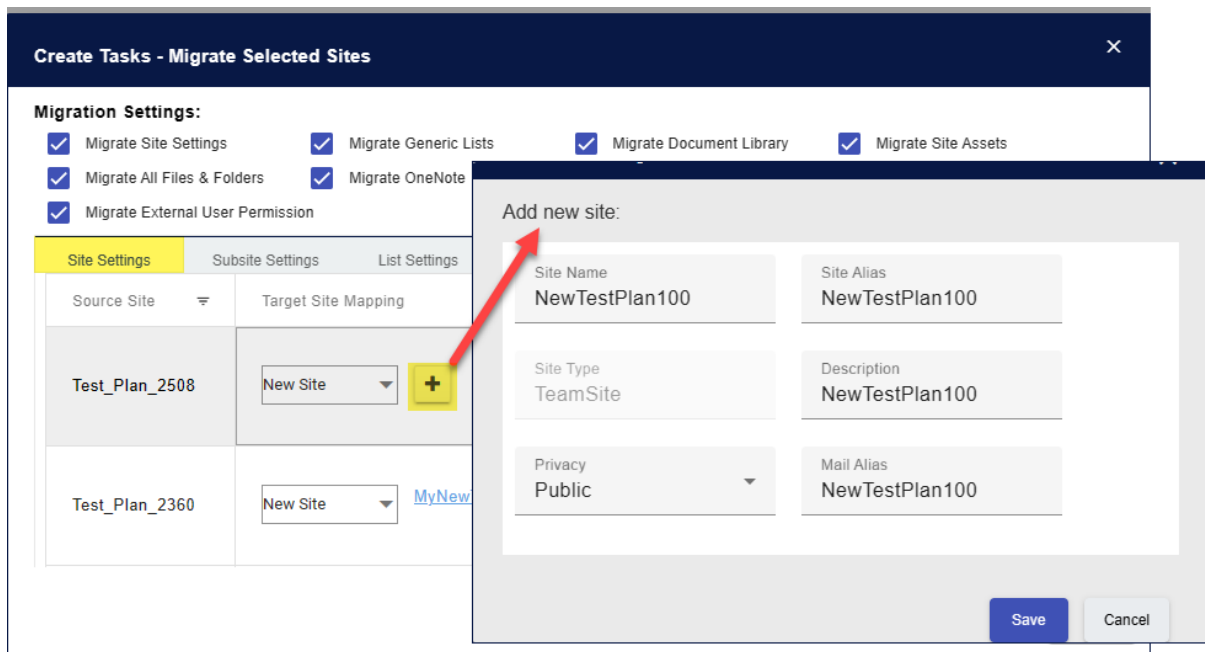
Site Settings

- ✓ You can choose how do you want the target site(s) to be. You will have following two options to decide on.
 - Migrate into a new Site (OR)

- Append all site content into an existing Site
- ✓ You can choose to migrate the Settings – Site Settings, Page Settings, Navigation Settings
- ✓ You can choose to migrate the Term Groups part of the site.

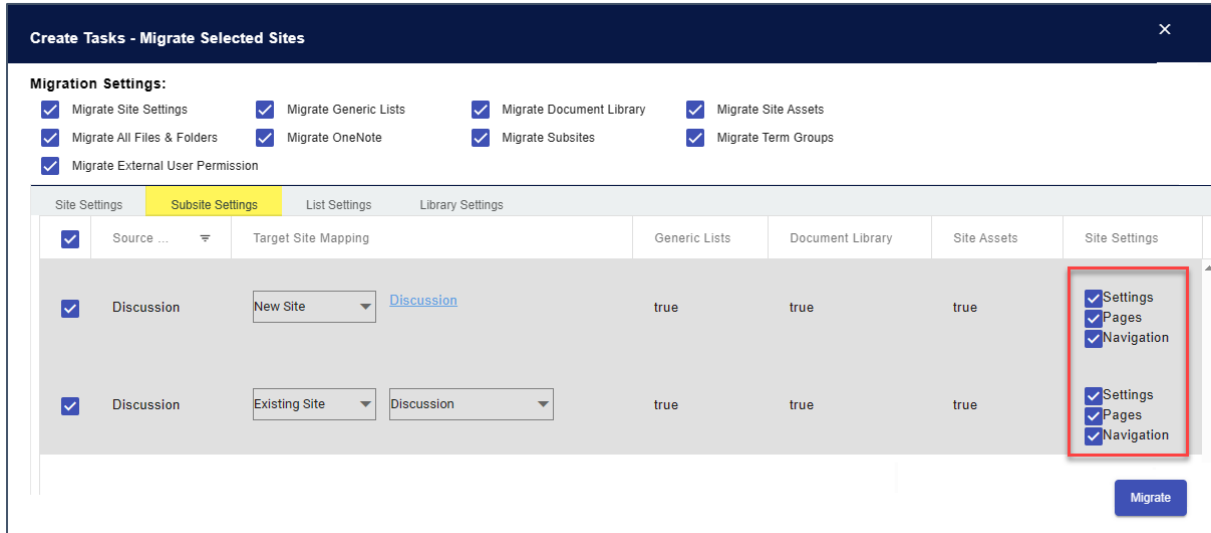


- ✓ You can choose to edit the name of the new Site by clicking on the + symbol.



Subsite Settings

- ✓ It is very much similar to the Site settings except that the migration of Lists and Library are decided from their parent sites settings.

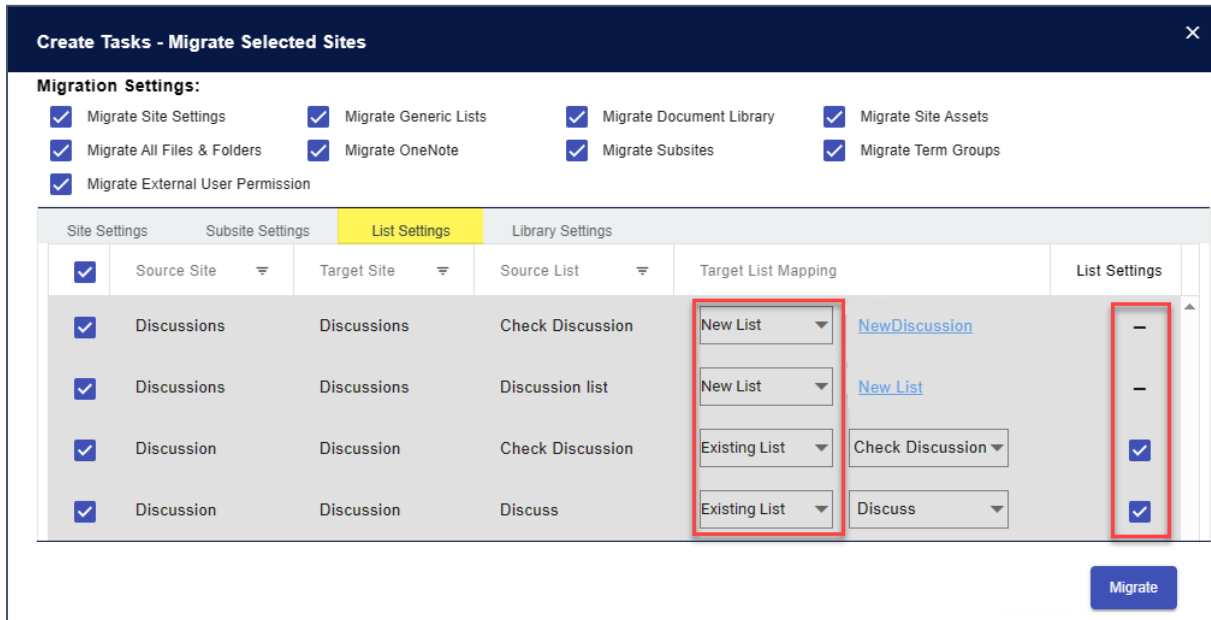


List Settings

You can choose how do you want the list in the target site(s) to be. You will have following two options to decide on.

- Migrate into a new list (OR)
- Append the list content into an existing list

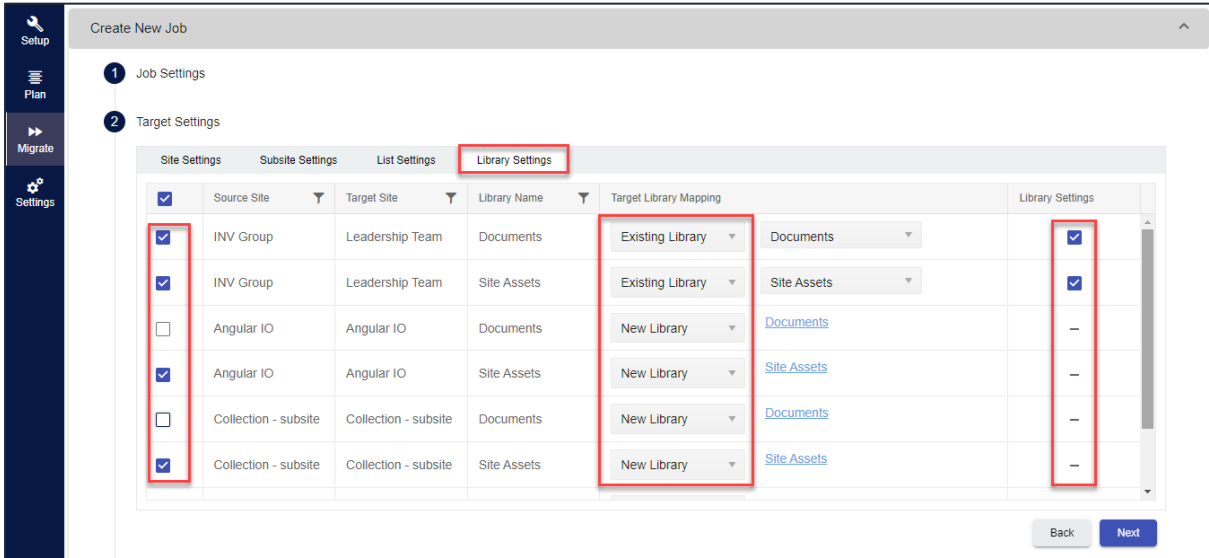
When migrating to an existing list, you can choose if to migrate the settings.



Library Settings

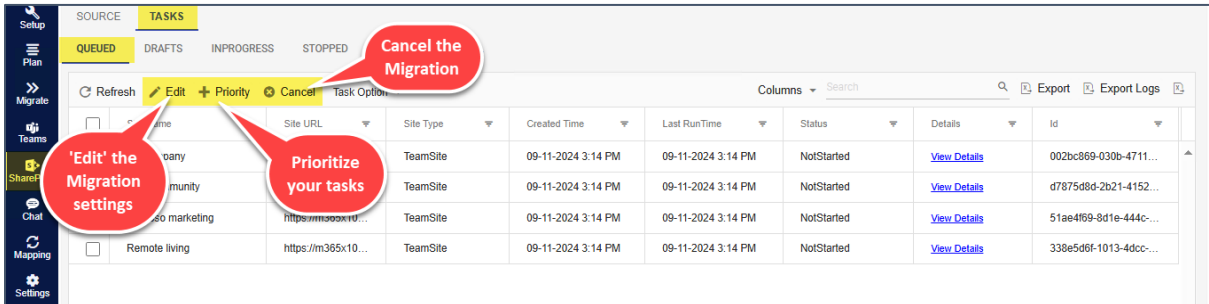
You have the option to

- ❖ Select the Document libraries that you must migrate to the target tenant as below.
- ❖ Choose to migrate to a new Library or an existing one in the target tenant.
- ❖ Choose to migrate the Library Settings.

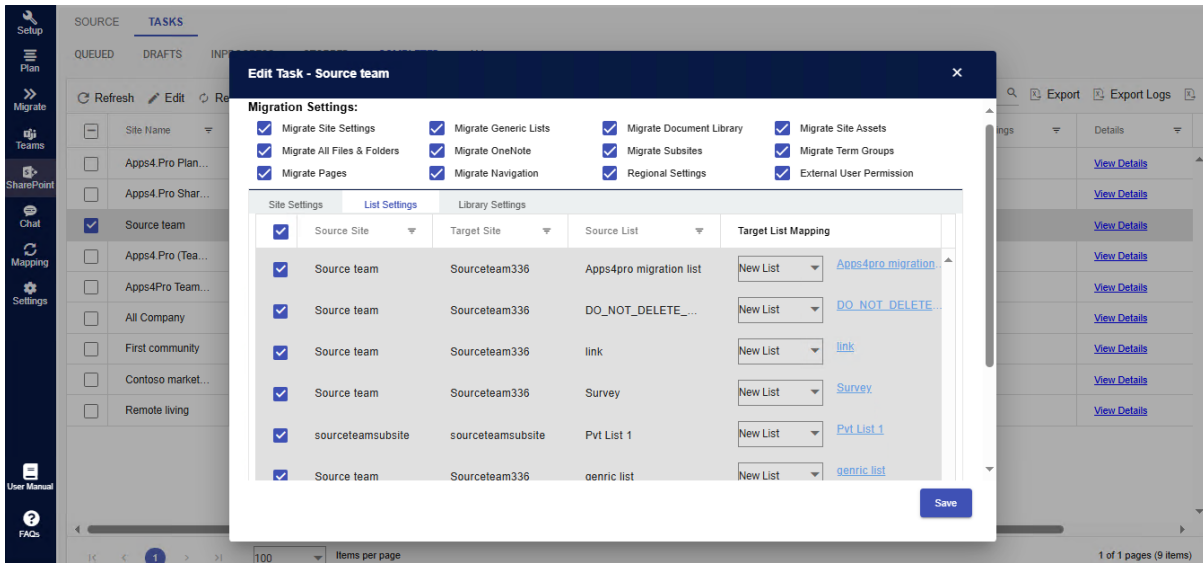


Step 5 : Task Execution

In this step, you can view the list of the sites queued up for Migration. The task gets triggered automatically.

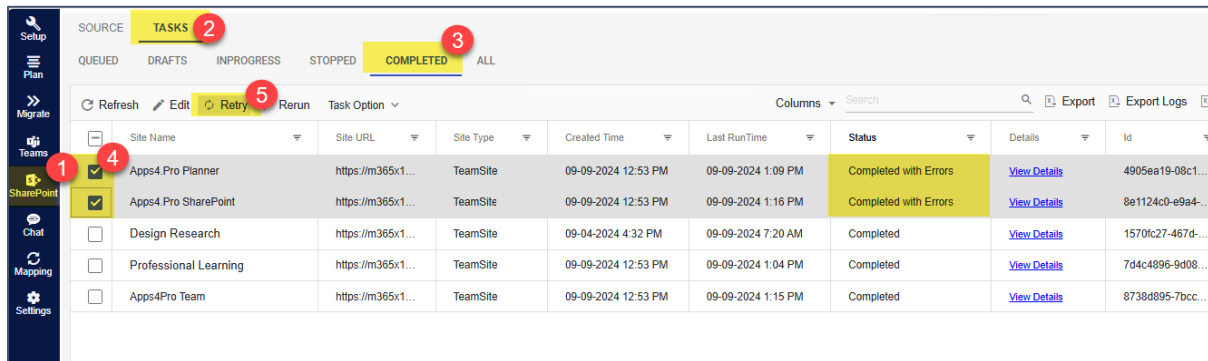


You get to edit the Migration settings by clicking 'Edit'. Make changes as required and 'Save' the changes.



Step 6 : How to 'Retry' a task

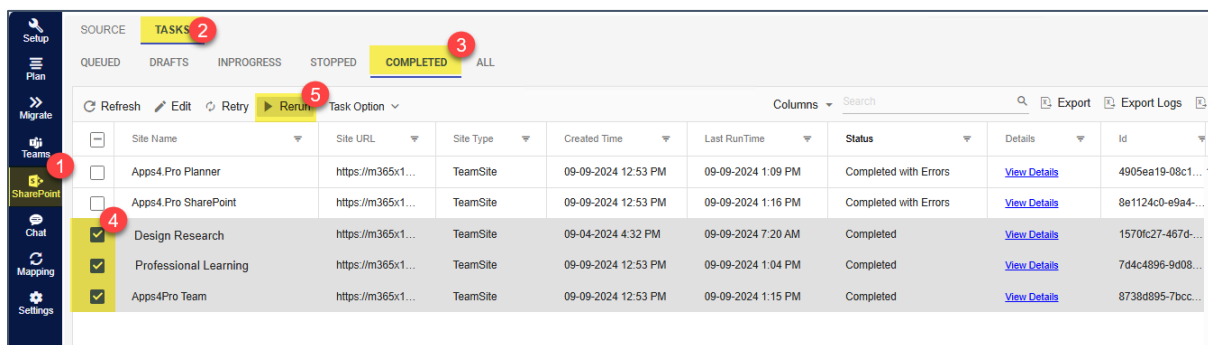
- 1) Navigate to SharePoint -> Tasks -> Completed
- 2) Select tasks that **Completed with Errors / Warnings**
- 3) Click 'Retry'



Step 7 : How to trigger 'Incremental Migration'

- 1) Navigate to SharePoint -> Tasks -> Completed
- 2) Select the Sites for which you need Incremental Migration
- 3) Click 'Rerun', the Incremental Migration gets executed.

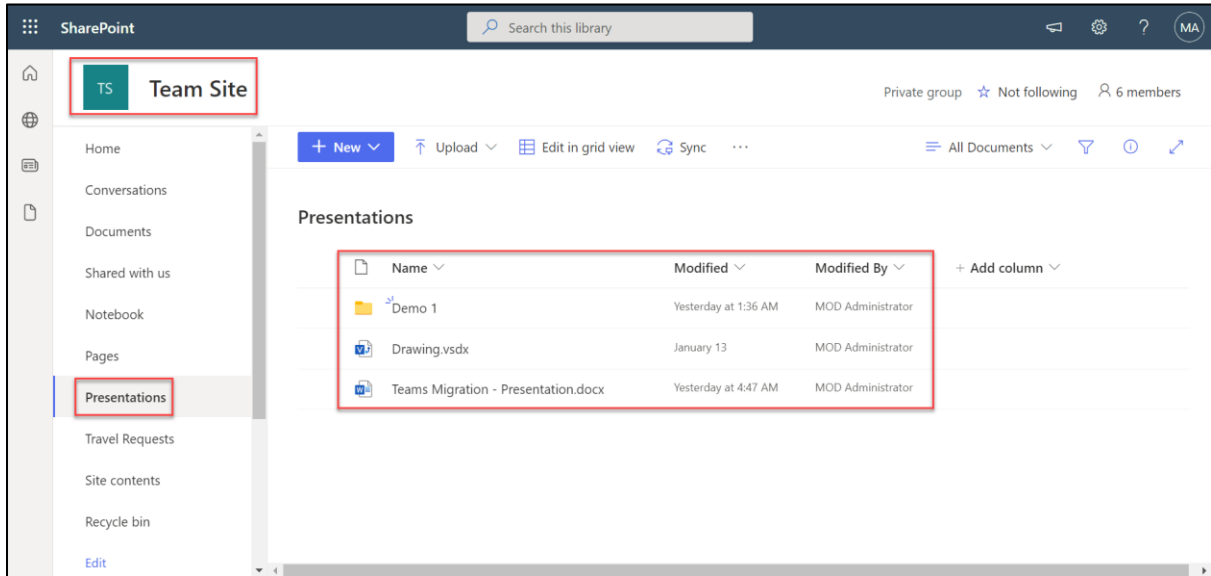
Note : If Status of the task is either "Completed with Errors / Completed with Warnings", please review the errors / warnings with the Support team, before you proceed with the Incremental Migration.



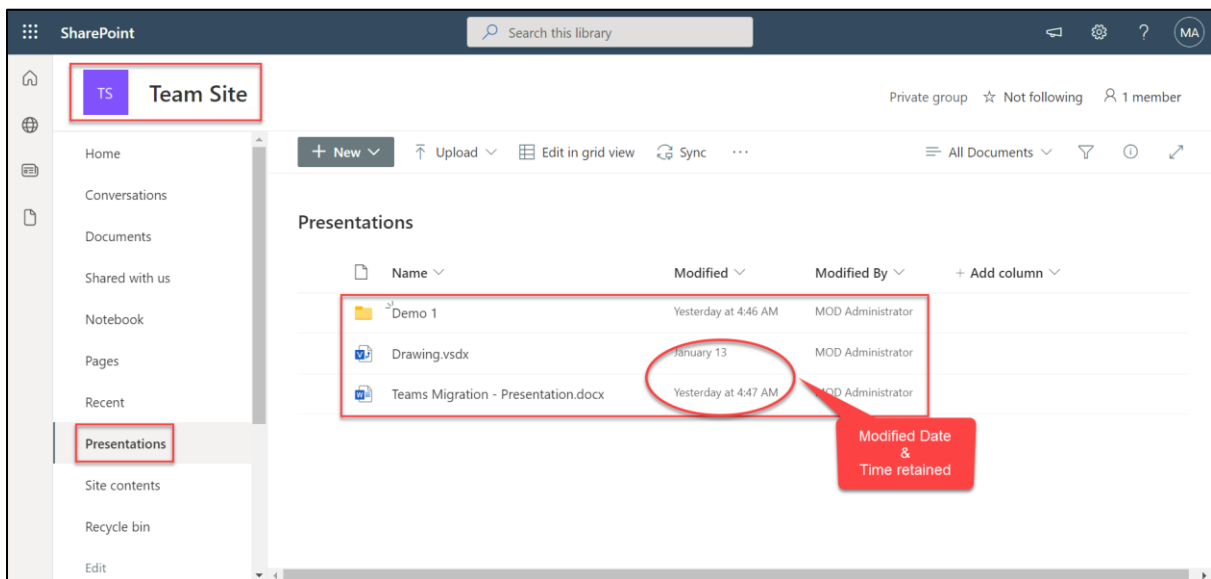
User Experience

Document Library

Source



Target



Version history

Source

SharePoint | Search this library | Private group | Following | 6 members

TS Team Site

Version history

Delete All Versions

No.	Modified	Modified By	Size
4.0	1/25/2022 2:24 AM	MOD Administrator	24.3 KB
3.0	1/25/2022 2:24 AM	MOD Administrator	24.2 KB
2.0	1/20/2022 4:47 AM	MOD Administrator	24.6 KB
1.0	1/13/2022 3:04 AM	MOD Administrator	20.5 KB

Teams Migration - Presentation.docx | About a minute ago | MOD Administrator

Target

SharePoint | Search this library

MT Migrated Team Site

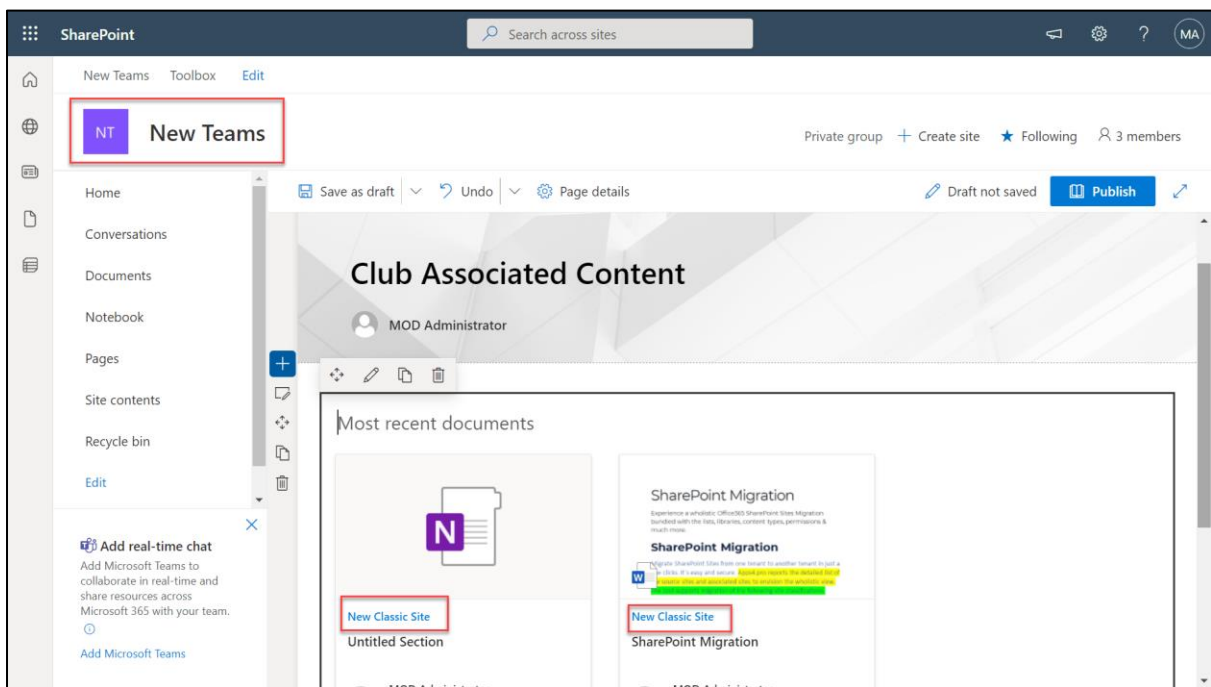
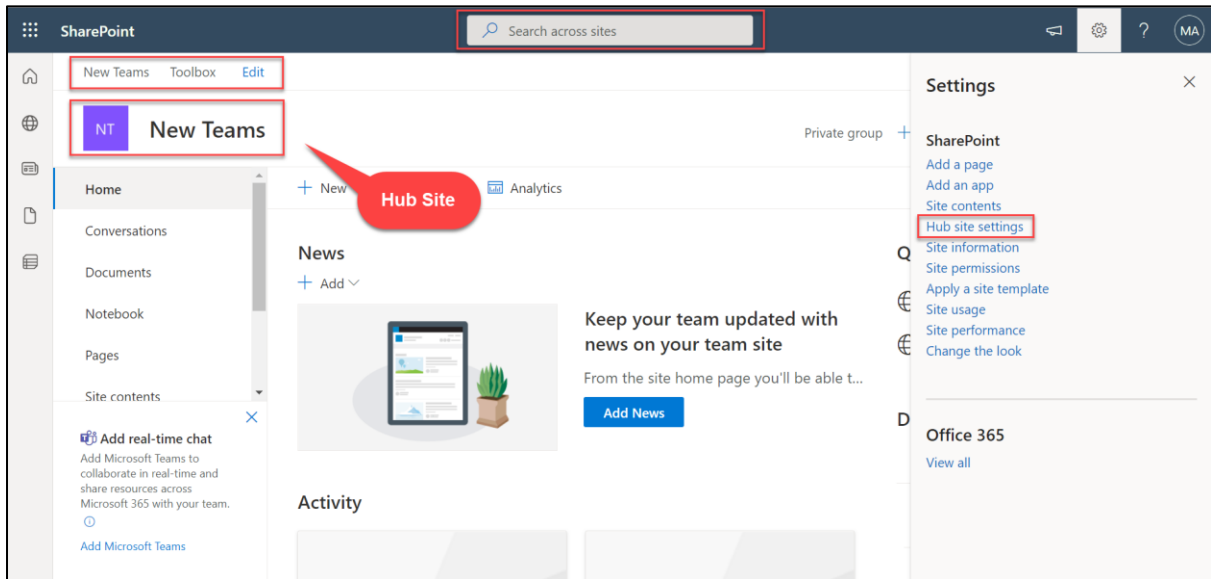
Version history

Delete All Versions

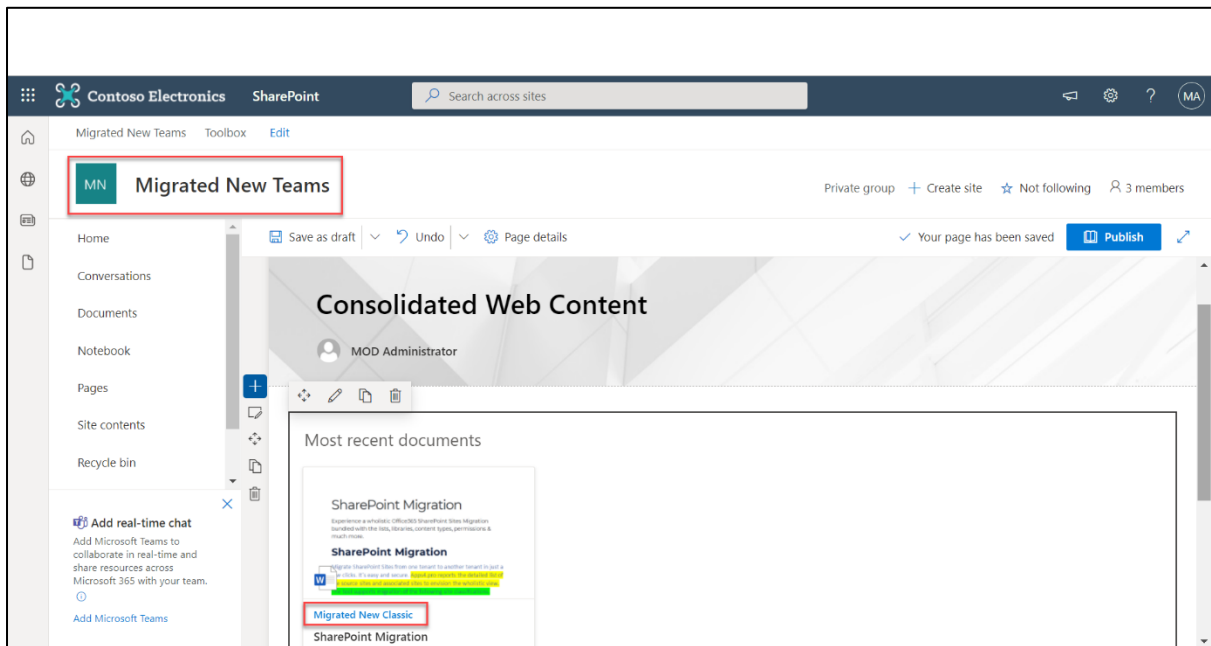
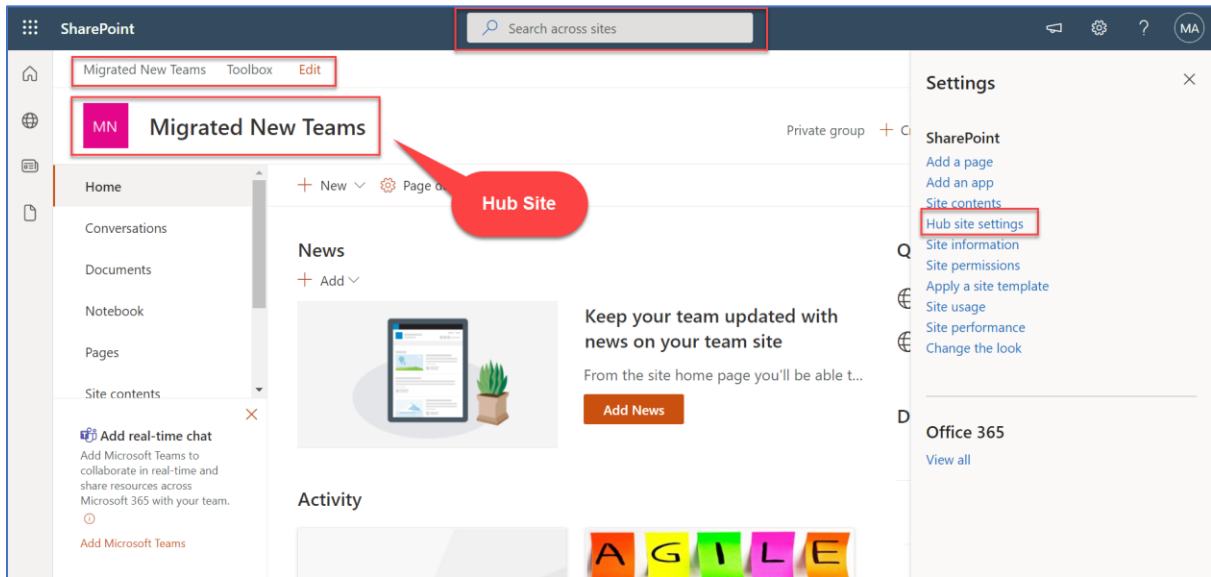
No.	Modified	Modified By	Size
5.0	1/25/2022 2:25 AM	MOD Administrator	24.3 KB
4.0	1/25/2022 5:27 AM	MOD Administrator	24.3 KB
3.0	1/25/2022 5:26 AM	MOD Administrator	24.2 KB
2.0	1/25/2022 5:26 AM	MOD Administrator	24.6 KB
1.0	1/25/2022 5:26 AM	MOD Administrator	24.4 KB

Teams Migration - Presentation.docx | 3 hours ago | MOD Administrator

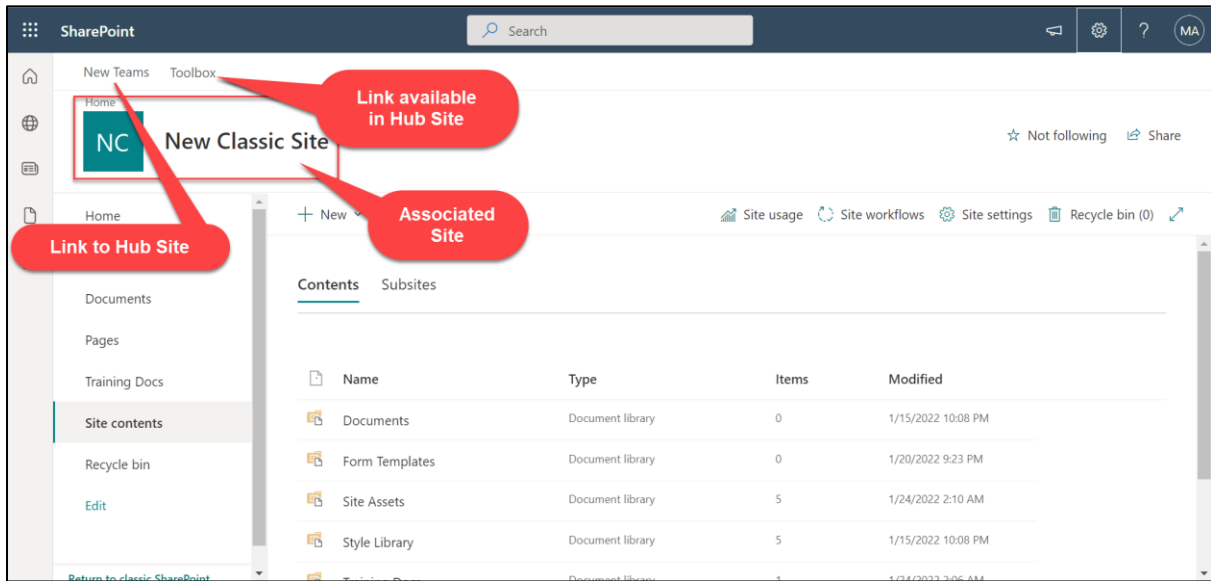
Hub Site - Source



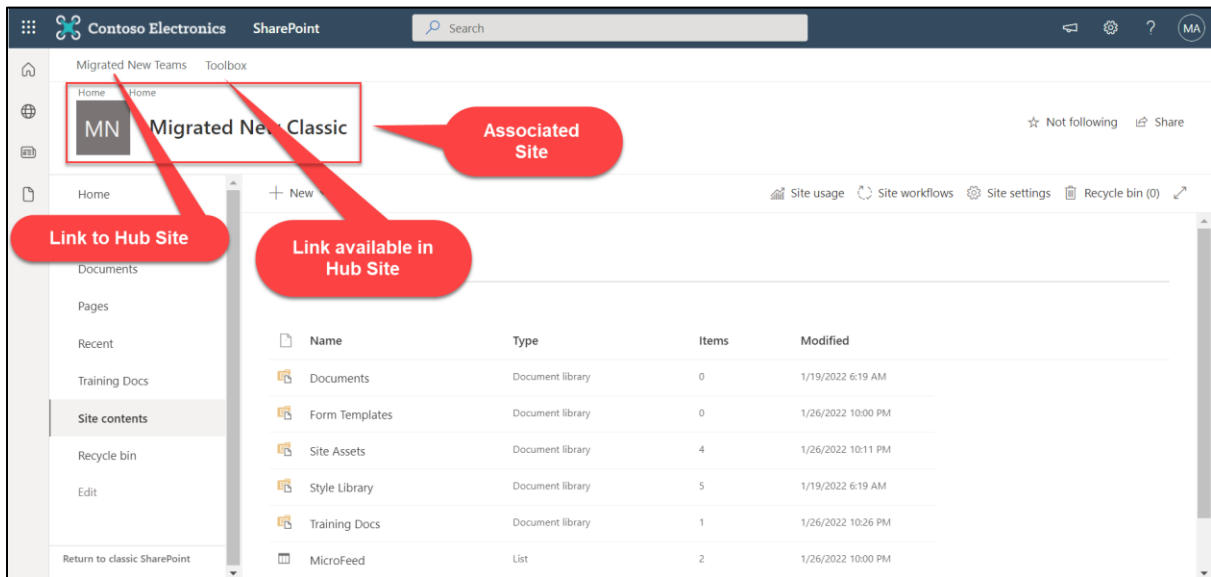
Hub Site - Target



Associated Site - Source

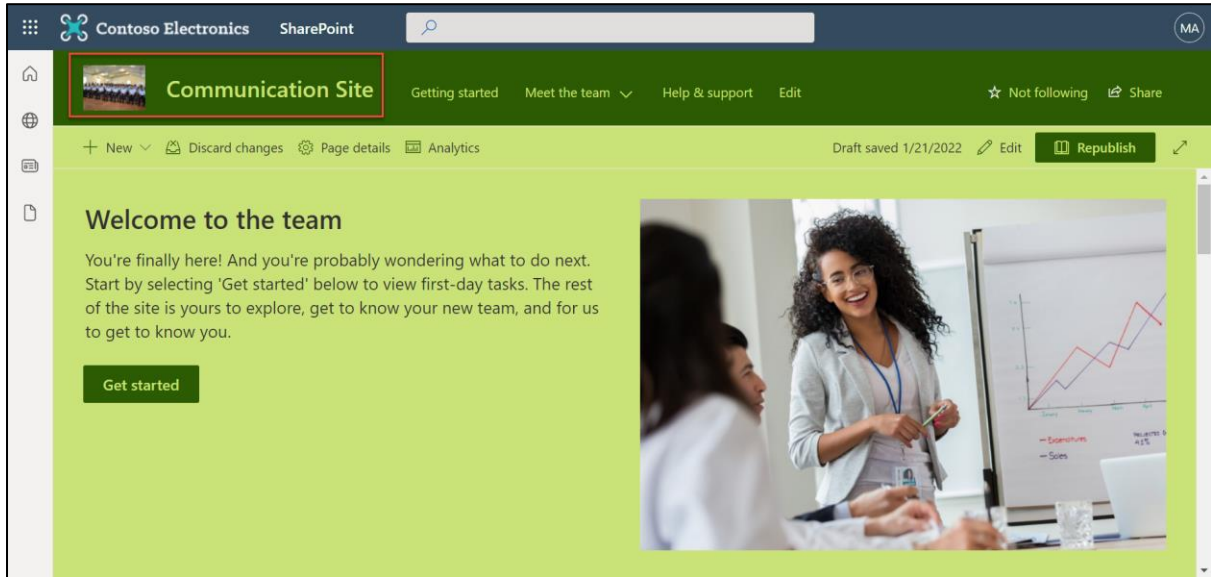


Associated Site – Target

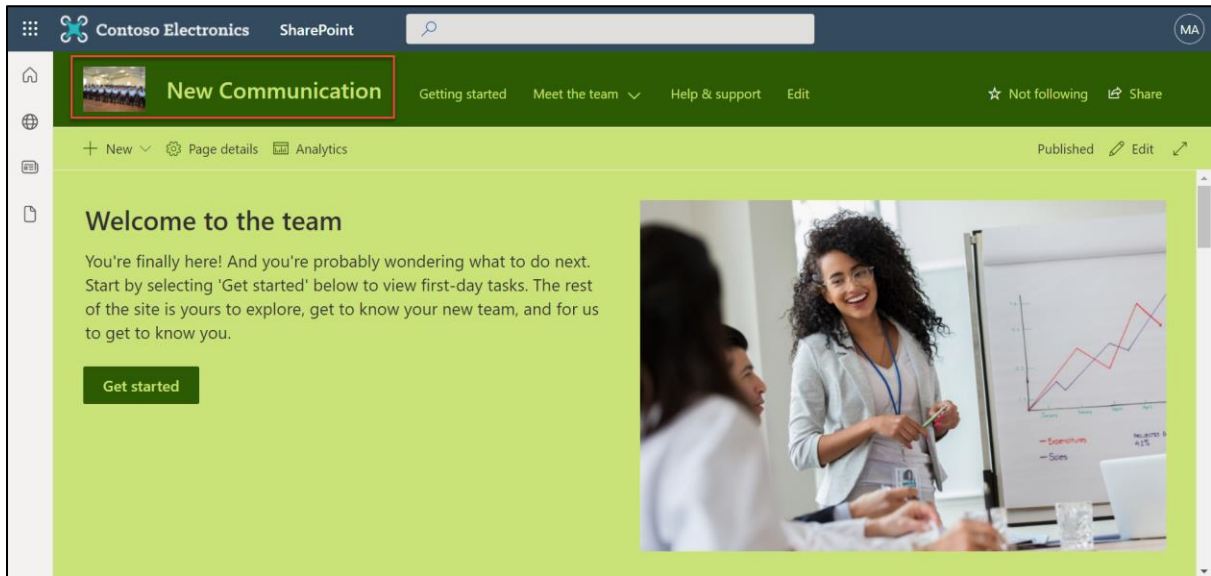


Logo & Theme

Source



Target



List

Source

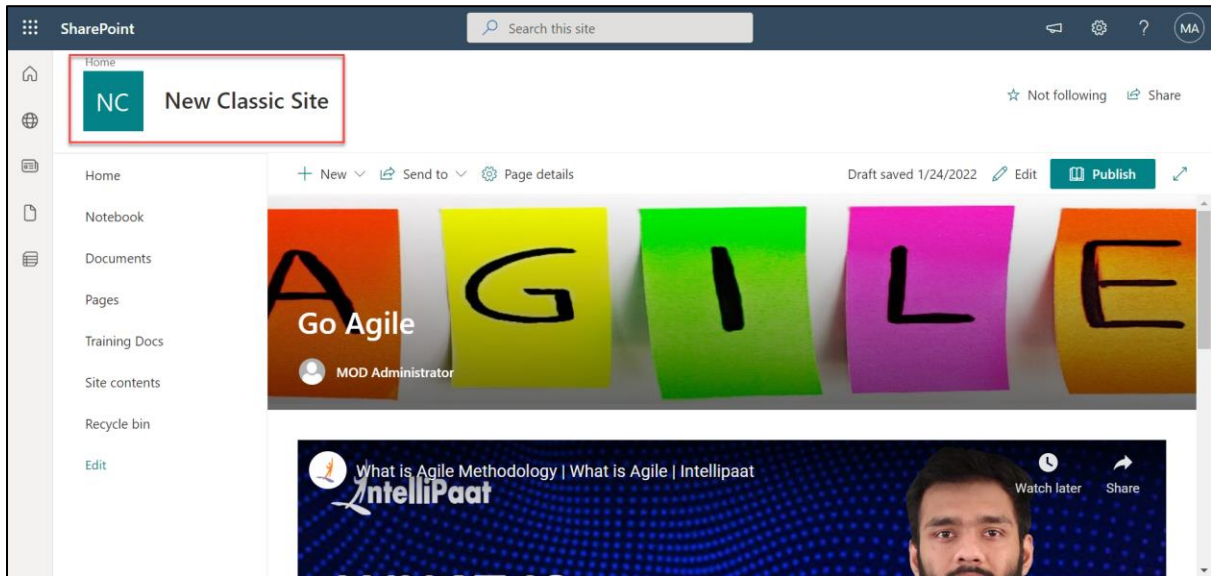
Employee Name	Role	Joining Date	Location	Induction Com...	Completed On	Mentor
Subbulakshmi	UI Analyst	4/5/2021	Chennai	✓	1/21/2022	
Karthiga	MW Developer	3/8/2021	Kerala	✓	1/10/2022	
Maniraj	UI Lead	12/1/2021	Chennai	✓	12/31/2021	

Target

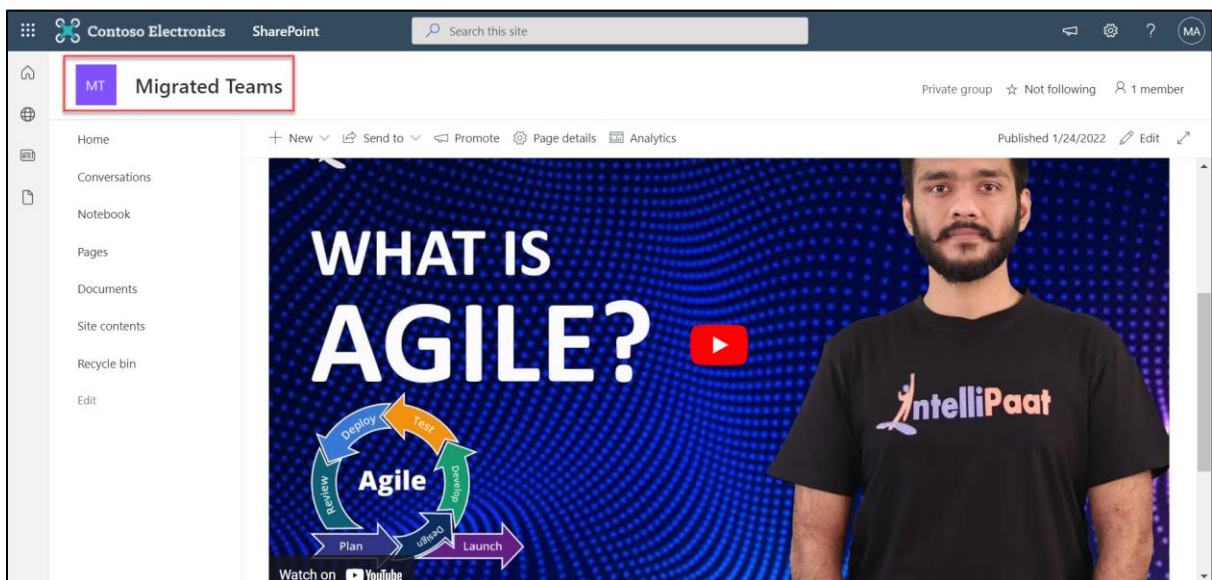
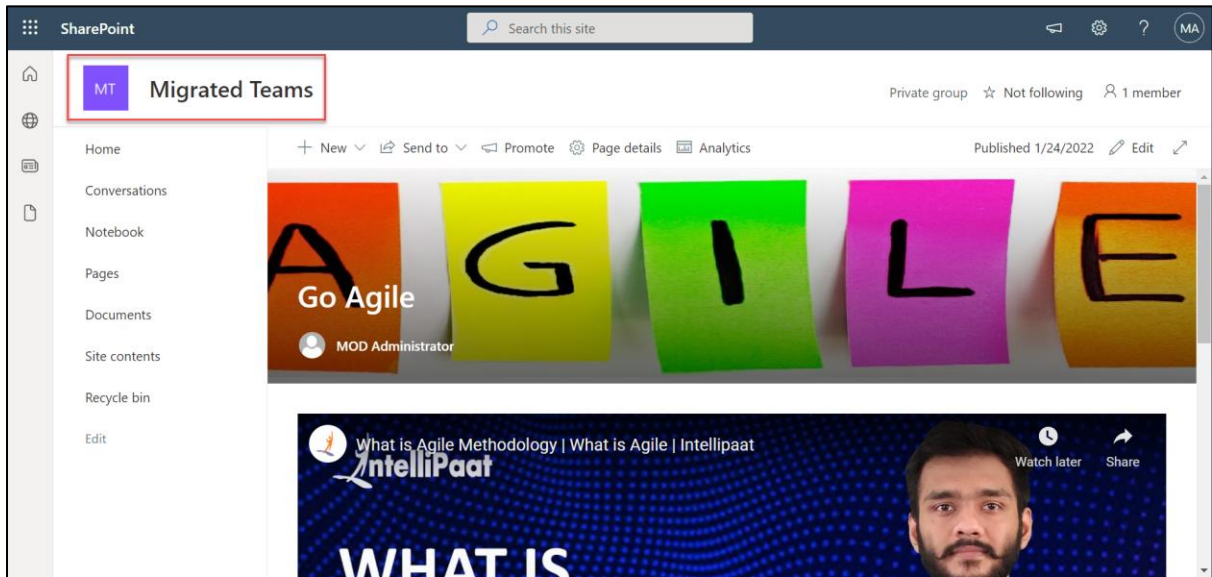
Employee Name	Title	Joining Date	Location	Induction Com...	Completed On	Mentor
Subbulakshmi	UI Analyst	4/5/2021	Chennai	✓	1/21/2022	
Maniraj	UI Lead	12/1/2021	Chennai	✓	12/31/2021	
Karthiga	MW Developer	3/8/2021	Kerala	✓	1/10/2022	

Page Content

Source



Target



New Column

Source

The screenshot shows the SharePoint interface for 'Contoso Electronics'. The 'New Columns' section is highlighted with a red box. The columns listed are:

Column Name	Field Type	Target Site
Classification	Single line of text	New Classic Site

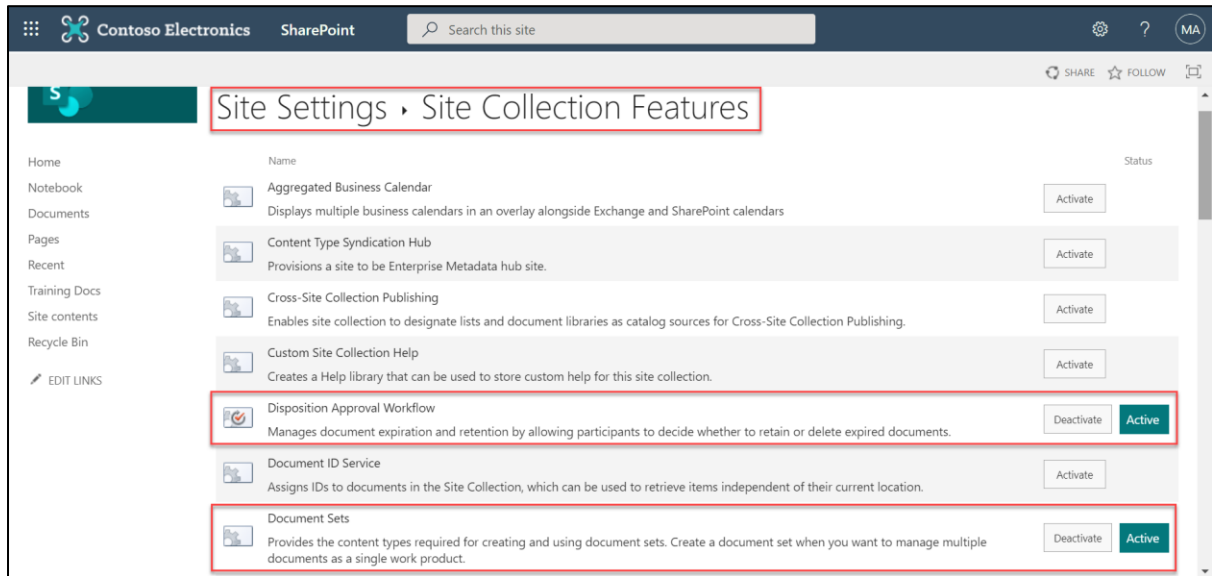
Target

The screenshot shows the SharePoint interface for 'Contoso Electronics' after migration. The 'New Columns' section is highlighted with a red box. The columns listed are:

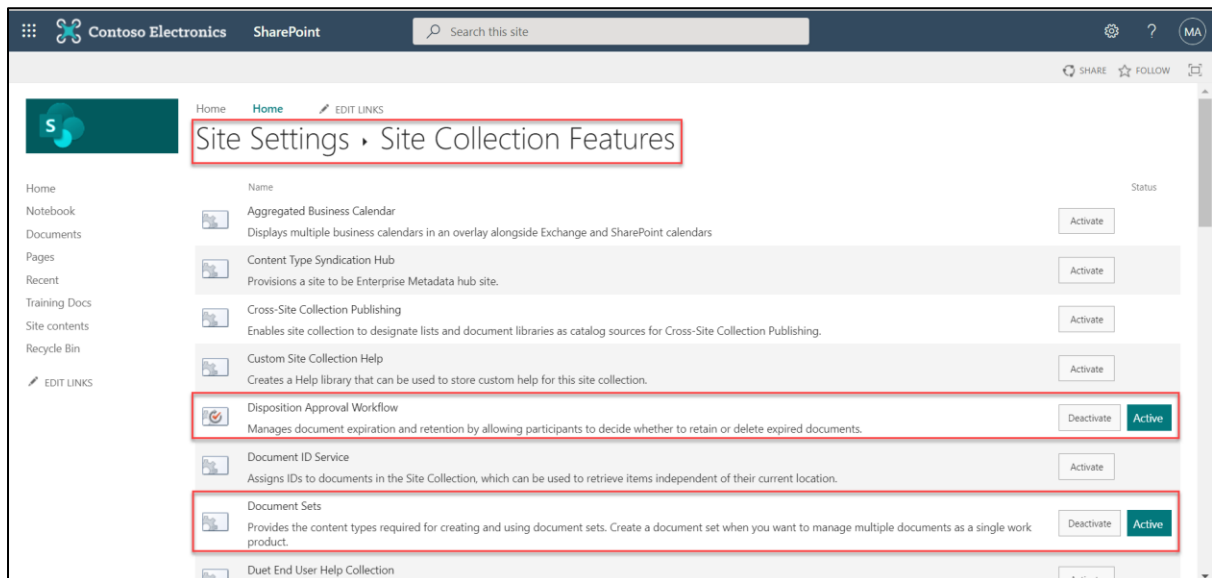
Column Name	Field Type	Target Site
Classification	Single line of text	Migrated Classic Site

Site Collection Features

Source



Target



Email Notification

When migrating a site to the target tenant, each member of the site will get an email notification.

2. Teams Migration

Step 1 : Setup & Configuration

Setup : License and Roles

1. **Microsoft 365/Office 365(E3 or E5) License** is required for Source & Target Connector Accounts.
2. **Microsoft Teams License** is required for both Source & Target Connector accounts.
3. **Teams Administrator role with Admin Consent and Delegated Permission** is required for both Source & Target Connector accounts.
4. Source Connector Account should be a
 - Owner & Member of the Teams that you chose to migrate (Please refer section: - *How to Add 'Source Connector Account' as a member of the Teams*)
 - Owner of the Teams with Private / Shared Channels.
 - Owner of the assignments & OneNote **for an Education Tenant**.

Admin Consent & Delegate Permission: For non-Global Administrators

Admin must provide Admin Consent & Delegate Permission just by clicking a link. Please contact support@jijitechnologies.com for further details.

Configuration : Connector Accounts – Sign-in

Perform the Source & Target Connector Accounts Sign-in as shown in *Global Configuration section*.

Additional Configuration : Additional Connector Accounts – Sign-in

Perform the additional Source & Target Accounts Sign-in as shown in *Additional Configuration section*.

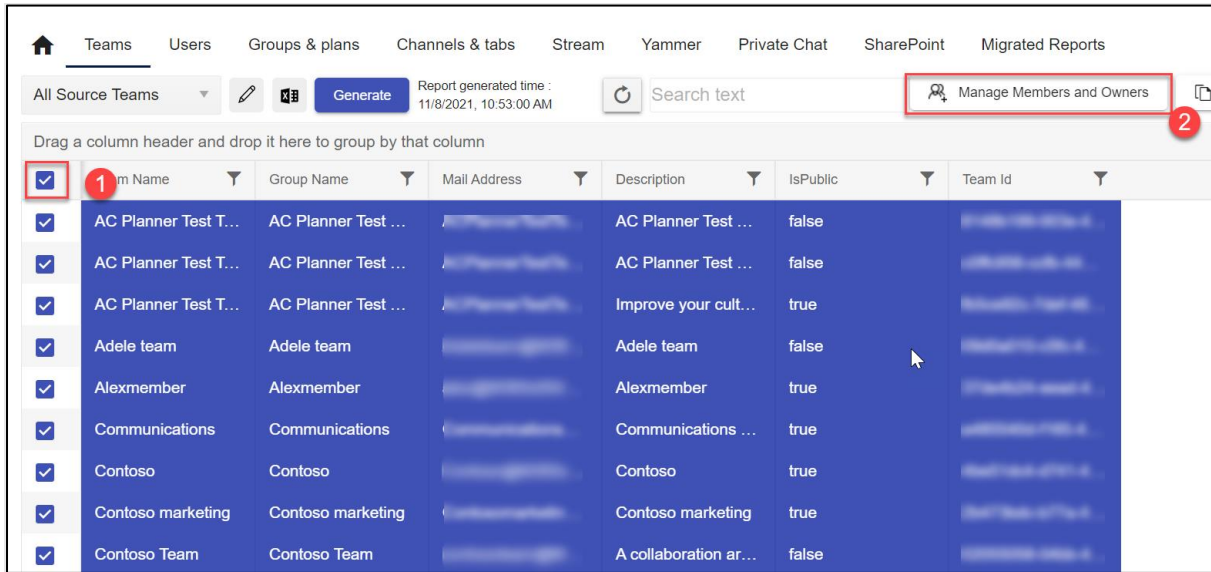
Mapping : Application User Mapping

Perform the Application-level User Mapping as shown in *Application User Mapping section*.

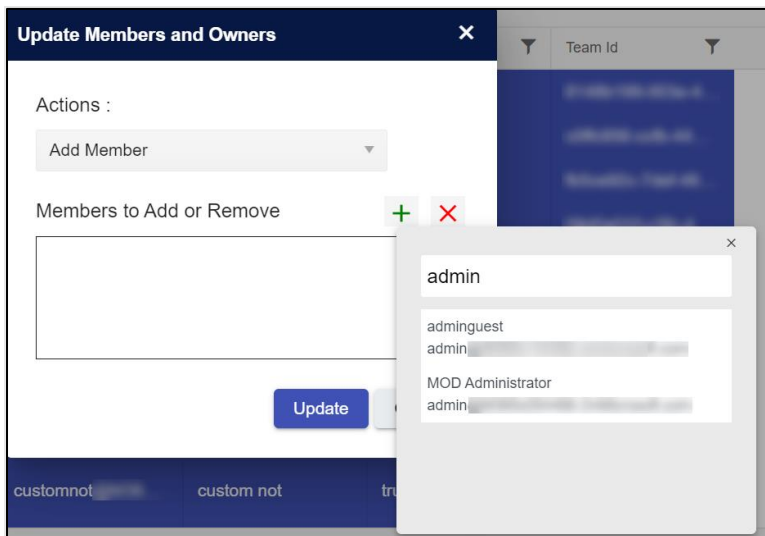
Step 2 : How to Add 'Source Connector Account' as a member of the Teams

The 'Source Connector' must be part of all the teams that has to be migrated. To achieve this in a single shot, we can make it as a member by following the below steps. Please note that "User Administrator" access is recommended to get themselves added.

1. Generate the 'All Source Teams' report by navigating to Plan -> Reports -> All Source Teams.
2. Select All Teams by clicking the checkbox as highlighted below.



3. On clicking “Manage Members and Owners”, below pop-up appears.
 - a. Choose ‘Add Member’
 - b. Choose the ‘Source Connector’ & Update.

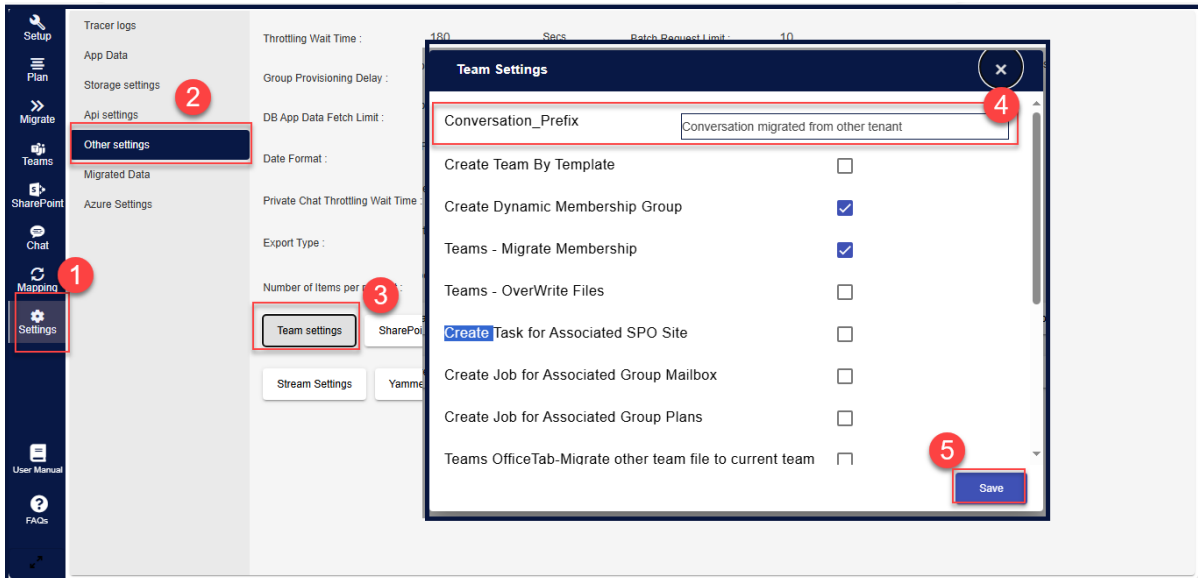


4. Results are shown on if the ‘Source Connector’ is added to the selected teams.

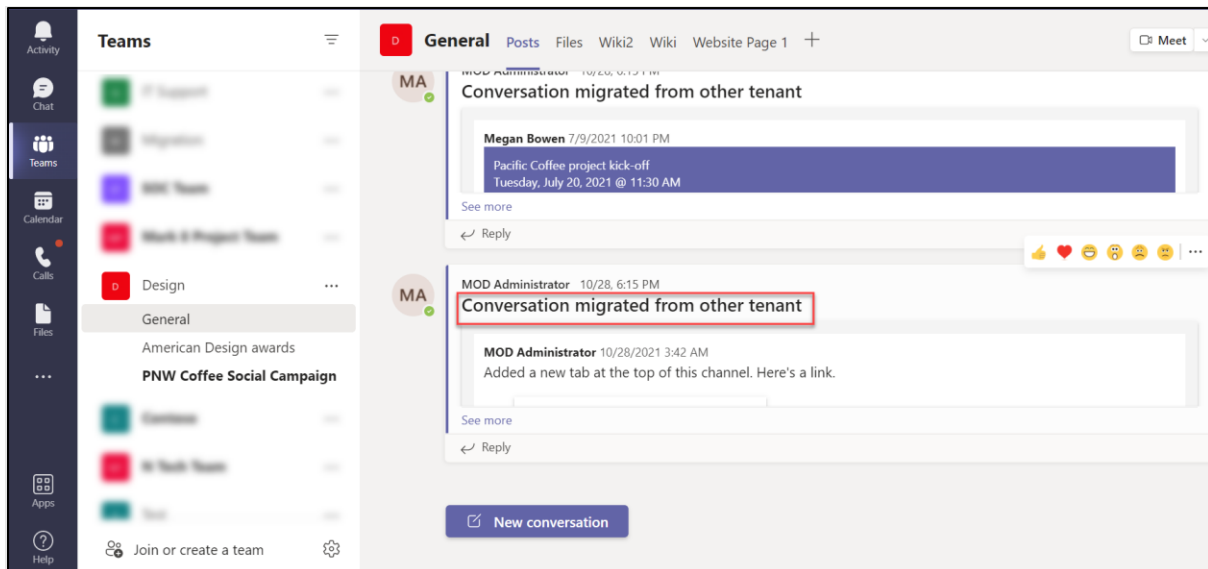
Step 3 : Additional Settings

1. Conversation prefix [OPTIONAL]

The app will migrate the conversations appended with the conversation prefix. To change this prefix, follow the steps as mentioned in the below screenshot. The text given in the below box will be appended along with the migrated conversations.

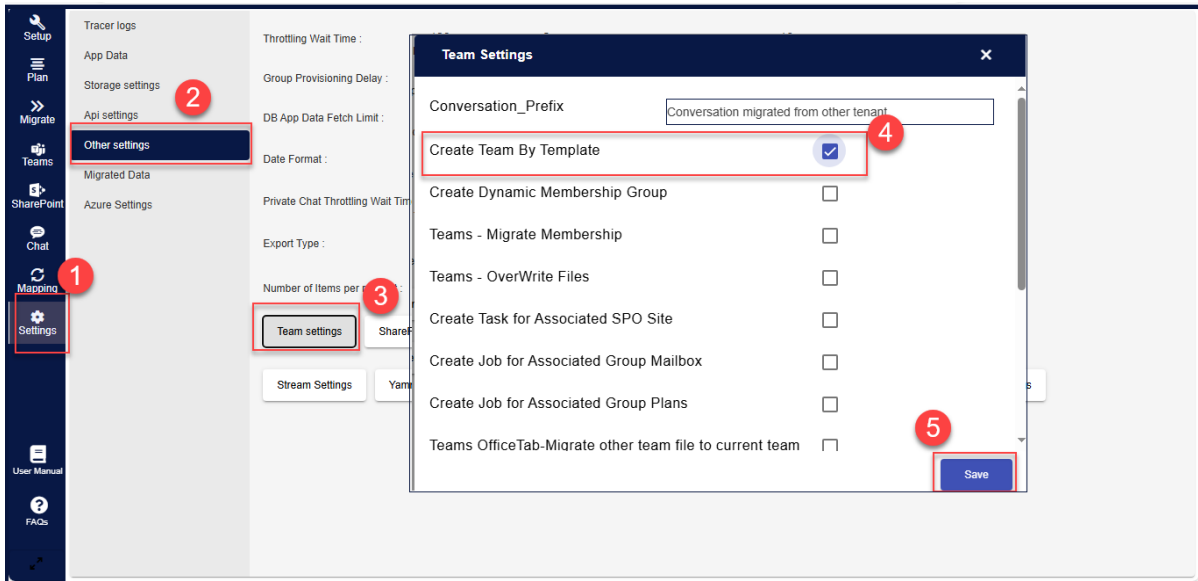


The prefix will be appended before each conversation as below in the target tenant



2. Enable “Create Team By Template” [MANDATORY only for an Education Tenant migration]

For an Education Tenant migration, it is mandatory to enable the “Create Team By Template” flag in Custom settings **before you initiate the migration**. Please refer the below screenshot.



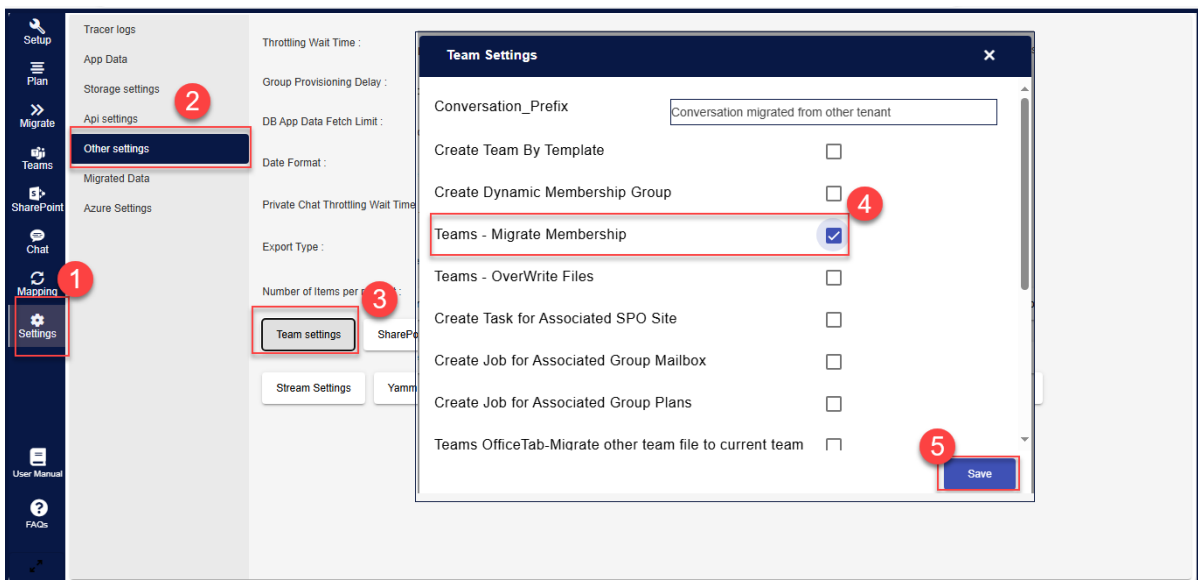
3. Skip “Migrate Membership” during Initial Migration [OPTIONAL]

When you migrate the memberships in the first place, the members will keep receiving notifications during the migration. In order to avoid these notifications, disable the option “Teams – Migrate Membership” before the Initial Migration. It is Enabled by DEFAULT.

You can **migrate the memberships at a later point post the Migration is completed**, by just

- Enabling the option “Teams – Migrate Membership”

Post which, the Migration tasks require re-try.

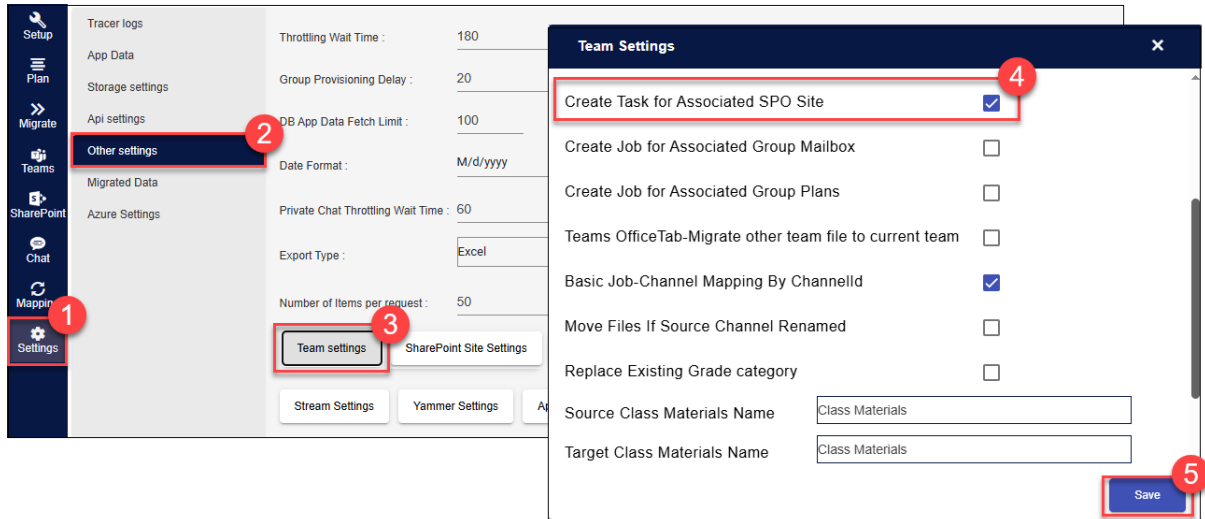


4. Create Associated SPO task [OPTIONAL]

In addition to the channel files, sometimes you would wish to migrate the additional lists and libraries part of the associated SharePoint sites. In such scenario, follow the below steps to achieve the same.

Step 1 : Enable the Option “Create Task for Associated SPO Site”

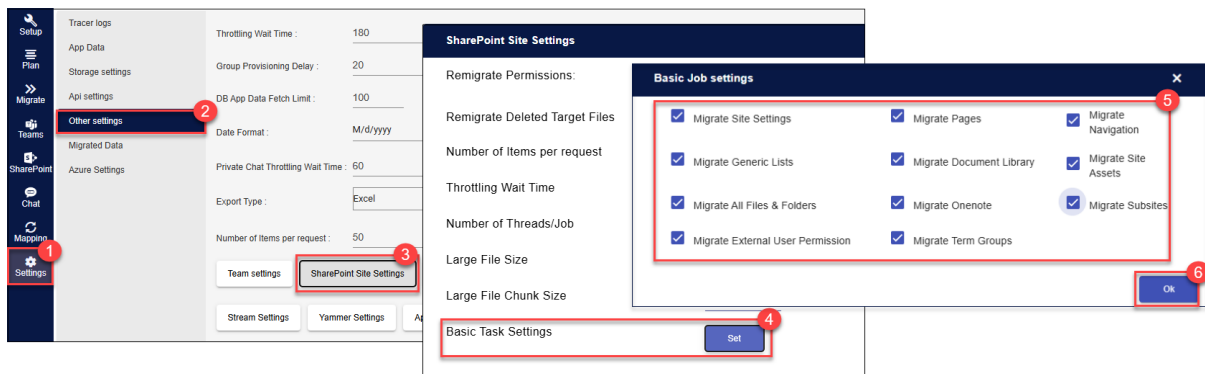
Navigate to Settings -> Other settings -> Team Settings, as depicted below.



Step 2 : Set-up the Basic Task Settings

As the associated SharePoint Task is created automatically, we have to configure the required ‘SharePoint-Basic Task Settings’ in advance for the SPO task to pick them.

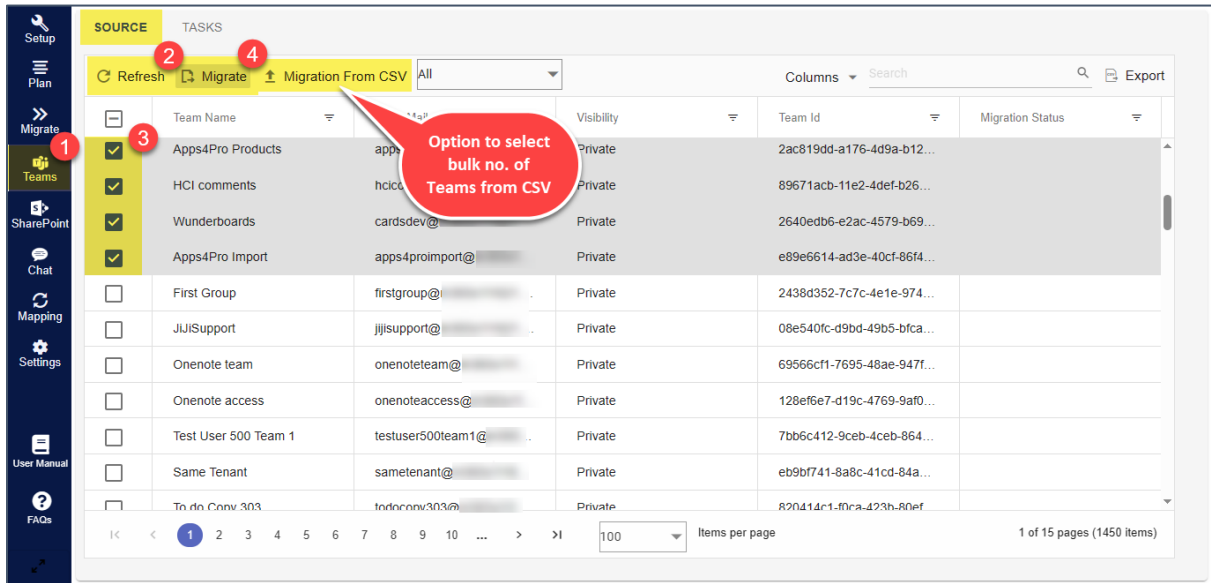
Navigate to Settings -> Other settings -> SharePoint Site Settings, as depicted below.



Step 4 : Create Task

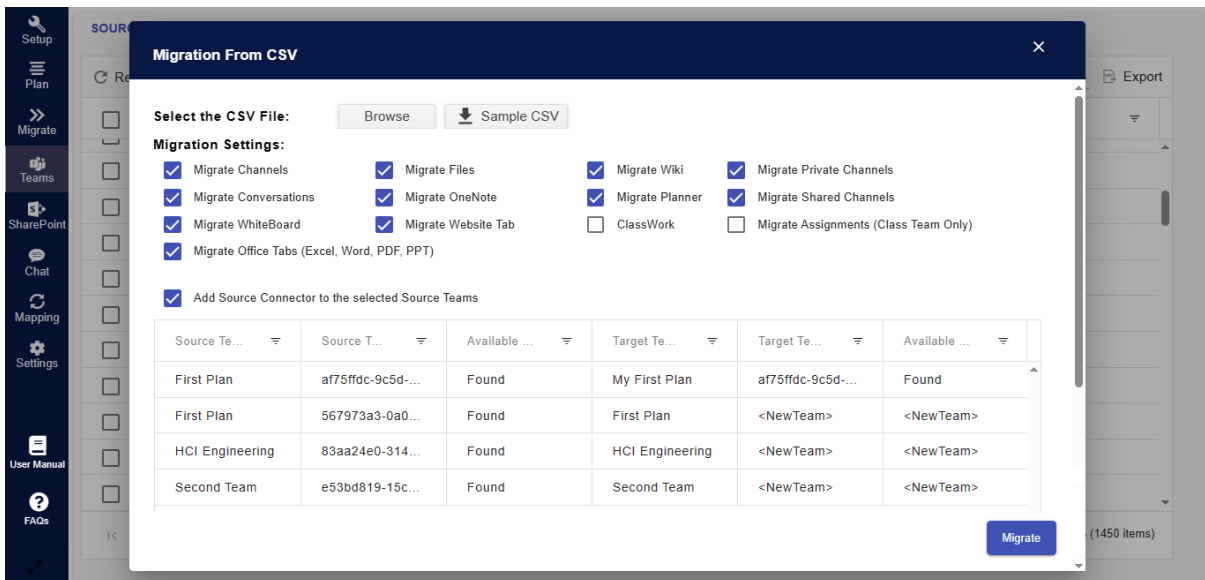
Follow the below steps to create a task

- 5) Navigate to ‘Teams’ tab.
- 6) Hit ‘Refresh’ to load the Teams.
- 7) Select the Teams you want to migrate.
- 8) Click **Migrate**



Migration from CSV : Select a bunch of Teams in a single shot using this option.

You can **Browse** for a CSV containing the details of the Teams to be Migrated.



Sample CSV :

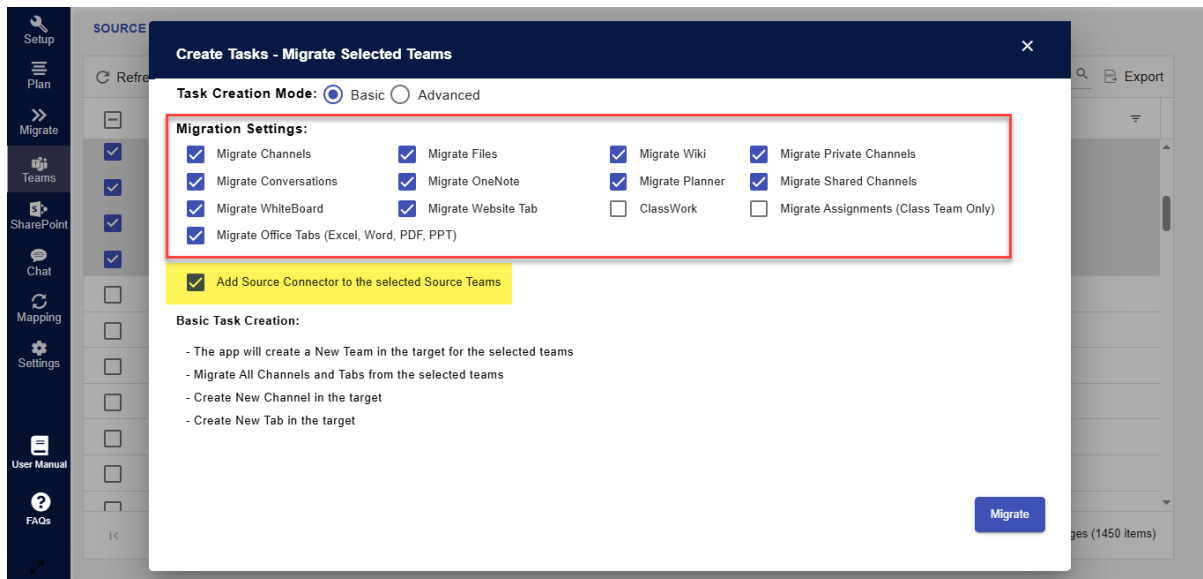
You can always download a sample CSV to feed in your data.

SourceTeamName	SourceTeamid	TargetTeamName	TargetTeamid	TargetTeamMailnickName	MigrateTeamSettings	MigrateTeamUsers
All Company	4c82aeda-f296-43a9-a80a-c7892	All Company			Yes	Yes
Analysis	4918c791-3b78-4353-8ad2-41f2c	Analysis-01		Analysis	Yes	Yes
Apps4Pro Products	73de47bc-ac48-41ea-b45d-740a	Apps4Pro Products	b1fbf564-b8a9-47f2-94c0-316a7b		No	Yes
Admin Team	481e7bd8-1a29-4bff-9974-74b5	Admin Team	2ee4f0d5-c455-46c3-9c81-3f1de		No	Yes

Step 4 : Choose Migration Settings

You can also choose the other options whether the Team Migration process includes Conversations, Files, Private Channels, Shared Channels, OneNote tab, Planner tab, Office tab and Website tab.

Basic Mode : Choose 'Basic' Mode to enable users to have the exact replica of the Source to the Target.



Advanced Mode: Choose 'Advanced' Mode to enable users to make choices to migrate in the target

- As a new / existing team, channel, tab or plan.
- Customise the names of the target team, channel, tab or plan.
- Choose how to migrate the conversations

Add Source Connector to the selected Source Teams: Select this option if you want to add the Source Connector to the teams to be migrated, if they have not been added previously.

Step 5: Target Settings

When you choose **Advanced Mode**, tool lets you tailor the teams, channels, tabs and plans. Will see each of them in detail in this step.

Team Settings

In this step, you can choose how do you want the target team(s) to be. You will have following three options to decide on.

- Migrate into a new Team (OR)
- Append all team data into an existing Team (OR)
- Enable the team for an existing Group – target team's name will be same as that of the group's.

Migrate User : When migrating to an existing team / group, one can choose to migrate the additional members by enabling this option.

Create Tasks - Migrate Selected Teams
✕

Migrate Channels

Migrate Files

Migrate Wiki

Migrate Private Channels

Migrate Conversations

Migrate OneNote

Migrate Planner

Migrate Shared Channels

Migrate WhiteBoard

Migrate Website Tab

ClassWork

Migrate Assignments (Class Team Only)

Migrate Office Tabs (Excel, Word, PDF, PPT)

Add Source Connector to the selected Source Teams

Team Settings
Channel Settings
Tab Settings
Plan Settings

Source Team	Target Team Mapping	Migrate User	Replace with Source Team Settings
Apps4Pro Import	Existing Team	<input type="checkbox"/>	-
Apps4Pro Products	Existing Team	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
HCl comments	New Team	<input checked="" type="checkbox"/>	-
Wunderboards	Existing Group (Enable ...)	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Migrate

Channel Settings

Under Channel Settings tab, you can choose required channels to migrate and required components to be migrated along with channels. For existing target team, you can choose to migrate channel details either to a new channel or an already existing target channel.

Create Tasks - Migrate Selected Teams
✕

Task Creation Mode: Basic Advanced

Migration Settings:

Migrate Channels

Migrate Files

Migrate Wiki

Migrate Private Channels

Migrate Conversations

Migrate OneNote

Migrate Planner

Migrate Shared Channels

Migrate WhiteBoard

Migrate Website Tab

ClassWork

Migrate Assignments (Class Team Only)

Migrate Office Tabs (Excel, Word, PDF, PPT)

Add Source Connector to the selected Source Teams

Team Settings
Channel Settings
Tab Settings
Plan Settings

	Source Team	Target Team	Source...	Target Channel Mapping
<input checked="" type="checkbox"/>	Apps4Pro Import	Apps4Pro Import	Test Channel1	New Channel Test Channel
<input checked="" type="checkbox"/>	Apps4Pro Import	Apps4Pro Import	one	Existing Channel one

Migrate

You can even migrate conversations starting from a particular date.

Create Tasks - Migrate Selected Teams
✕

Task Creation Mode: Basic Advanced

Migration Settings:

<input checked="" type="checkbox"/> Migrate Channels	<input checked="" type="checkbox"/> Migrate Files	<input checked="" type="checkbox"/> Migrate Wiki	<input checked="" type="checkbox"/> Migrate Private Channels
<input checked="" type="checkbox"/> Migrate Conversations	<input checked="" type="checkbox"/> Migrate OneNote	<input checked="" type="checkbox"/> Migrate Planner	<input checked="" type="checkbox"/> Migrate Shared Channels
<input checked="" type="checkbox"/> Migrate WhiteBoard	<input checked="" type="checkbox"/> Migrate Website Tab	<input type="checkbox"/> ClassWork	<input type="checkbox"/> Migrate Assignments (Class Team Only)
<input checked="" type="checkbox"/> Migrate Office Tabs (Excel, Word, PDF, PPT)			
<input checked="" type="checkbox"/> Add Source Connector to the selected Source Teams			

Team Settings	Channel Settings	Tab Settings	Plan Settings
Source... ▾	Target Channel Mapping		Conversation
Test Channel1	New Channel ▾ Test Channel		<input checked="" type="radio"/> Post as Individual Conversations <input type="radio"/> Post as HTML Format <input checked="" type="checkbox"/> MigrateFrom:2020-01-01 📅 <input type="radio"/> None <input type="radio"/> Post as Individual Conversations <input checked="" type="radio"/> Post as HTML Format
one	Existing Channel ▾	one ▾	

Tab Settings

Under Tab Settings, you can choose required tabs to migrate and map the tab with existing tab if you have selected existing target team/channel.

Create Tasks - Migrate Selected Teams ✕

Task Creation Mode: Basic Advanced

Migration Settings:

- Migrate Channels
- Migrate Conversations
- Migrate WhiteBoard
- Migrate Office Tabs (Excel, Word, PDF, PPT)
- Migrate Files
- Migrate OneNote
- Migrate Website Tab
- Migrate Wiki
- Migrate Planner
- ClassWork
- Migrate Private Channels
- Migrate Shared Channels
- Migrate Assignments (Class Team Only)

Add Source Connector to the selected Source Teams

Team Settings	Channel Settings	Tab Settings	Plan Settings
<input checked="" type="checkbox"/>	Tab	Source Ch...	Target ...
<input checked="" type="checkbox"/>	Apps4Pro...	General/Apps4P...	General/Ap...
<input checked="" type="checkbox"/>	new note ...	General/Apps4P...	General/Ap...
<input checked="" type="checkbox"/>	Apps4Pro...	General/Apps4P...	General/Ap...
<input checked="" type="checkbox"/>	new note	General/Apps4P...	General/Ap...

Target Tab Mapping	Tab Type
Existing Tab	Planner
new note (1)	OneNote
Apps4Pro Import	Planner
new note	OneNote

Plan Settings

Under Plan Settings tab, it lists the plans available in the selected teams, and you can select the format of the planner task attachments and comments.

Create Tasks - Migrate Selected Teams ✕

Task Creation Mode: Basic Advanced

Migration Settings:

- Migrate Channels
- Migrate Conversations
- Migrate WhiteBoard
- Migrate Office Tabs (Excel, Word, PDF, PPT)
- Migrate Files
- Migrate OneNote
- Migrate Website Tab
- Migrate Wiki
- Migrate Planner
- ClassWork
- Migrate Private Channels
- Migrate Shared Channels
- Migrate Assignments (Class Team Only)

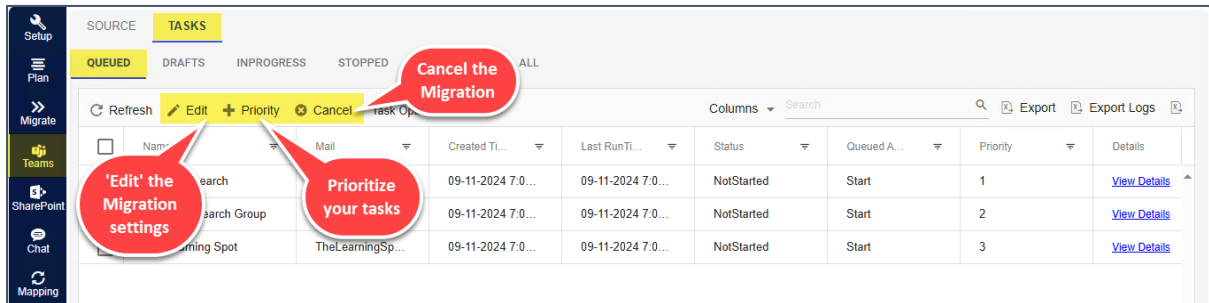
Add Source Connector to the selected Source Teams

Team Settings	Channel Settings	Tab Settings	Plan Settings
Source Channel/Team	Target Channel/Team	Source Plan Name	Target Plan Name
General/Apps4Pro Import	General/Apps4Pro Import	Apps4Pro Import	Apps4Pro Import
General/Apps4Pro Import	General/Apps4Pro Import	Apps4Pro Import	Apps4Pro Import

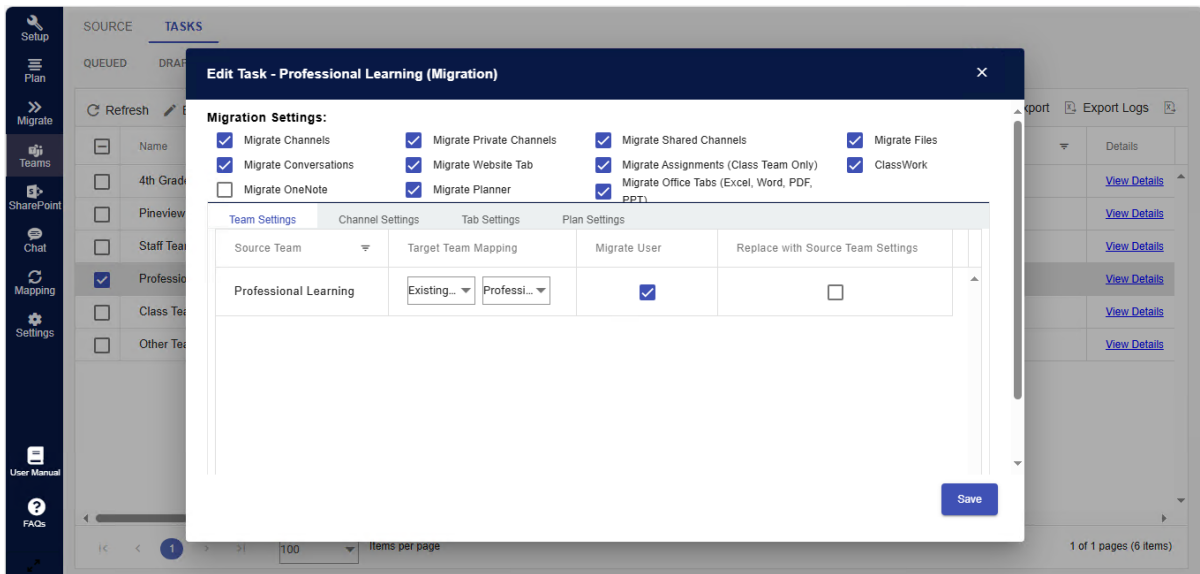
Attachments	Comments
<input type="radio"/> None <input checked="" type="radio"/> Copy URLs and SharePoint Files <input type="radio"/> Copy URLs alone	<input type="radio"/> None <input checked="" type="radio"/> Post as HTML Format <input type="radio"/> Post as Individual Conversation
<input type="radio"/> None <input checked="" type="radio"/> Copy URLs and SharePoint Files <input type="radio"/> Copy URLs alone	<input type="radio"/> None <input checked="" type="radio"/> Post as HTML Format <input type="radio"/> Post as Individual Conversation

Step 6 : Task Execution

In this step, you can view the list of the Teams queued up for Migration. The task gets triggered automatically.



You get to edit the Migration settings by clicking 'Edit'. Make changes as required and 'Save' the changes.



Once the Teams Migration tasks completes,

If “**Create Task for Associated SPO Site**” setting is enabled as mentioned in the Additional Setting : [Create Associated SPO task](#), associated SPO tasks are created automatically as highlighted below.

- Part of the SPO task, associated SharePoint Sites of the Groups linked with the selected Teams are migrated. All aspects of these sites are migrated including - Pages, files, folders, document libraries, Permissions etc.

Note : In this scenario, the OneNote content and the channel files are migrated from the Associated SharePoint Task only.

Site Name	Site URL	Site Type	Created Ti...	Last RunTi...	Status	Errors	Warnings
Learning	https://...	TeamSite	09-06-2024 12:...	09-06-2024 1:0...	Completed	0	0
Learning - Channel 1 (Private)	https://...	TEAMCHANNEL#0	09-06-2024 12:...	09-06-2024 12:...	Completed	0	0
Class Team	https://...	TeamSite	09-06-2024 2.1...	09-06-2024 2.2...	Completed	0	0
Class Team -Shared channel	https://...	TEAMCHANNEL#0	09-06-2024 2.1...	09-06-2024 2.1...	Completed	0	0
Health Research	https://...	TeamSite	09-09-2024 3.4...	09-09-2024 3.4...	Completed	0	0

Step 7 : How to 'Retry' for a task

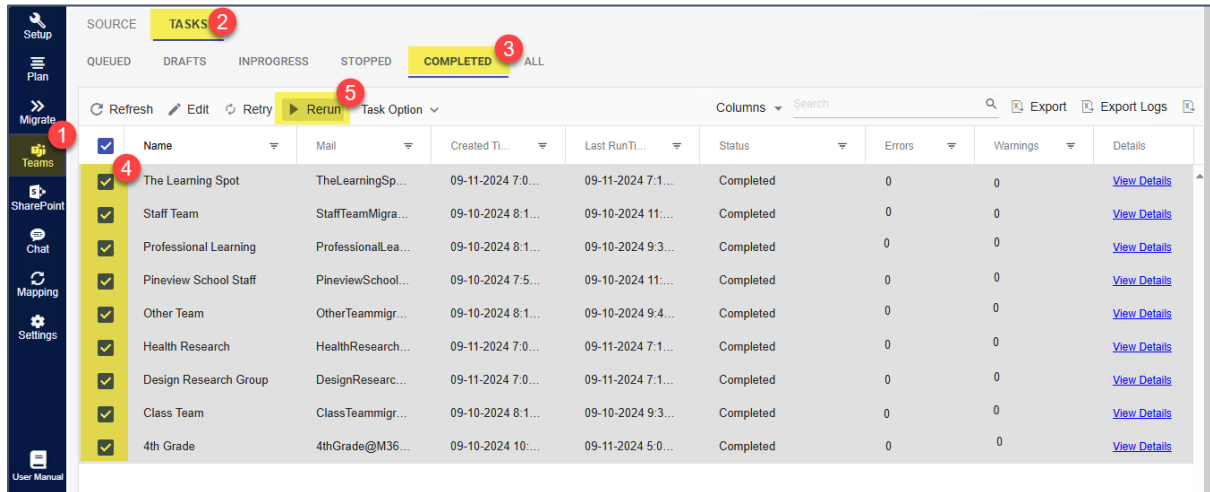
- 1) Navigate to Teams -> Tasks -> Completed
- 2) Select tasks that **Completed with Errors / Warnings**
- 3) Click 'Retry'

Name	Mail	Created Ti...	Last RunTi...	Status	Errors	Warnings	Details
<input checked="" type="checkbox"/> The Learning Spot	TheLearningSp...	09-11-2024 7.0...	09-11-2024 7.1...	Completed with Errors	6	7	View Details
<input checked="" type="checkbox"/> Staff Team	StaffTeamMigra...	09-10-2024 8.1...	09-10-2024 11:...	Completed with Errors	2	0	View Details
<input checked="" type="checkbox"/> Professional Learning	ProfessionalLea...	09-10-2024 8.1...	09-10-2024 9.3...	Completed with Errors	1	1	View Details
<input checked="" type="checkbox"/> Pineview School Staff	PineviewSchool...	09-10-2024 7.5...	09-10-2024 11:...	Completed with Errors	3	5	View Details
<input checked="" type="checkbox"/> Other Team	OtherTeammigr...	09-10-2024 8.1...	09-10-2024 9.4...	Completed with Errors	3	1	View Details
<input checked="" type="checkbox"/> Health Research	HealthResearch...	09-11-2024 7.0...	09-11-2024 7.1...	Completed with Errors	1	2	View Details
<input checked="" type="checkbox"/> Design Research Group	DesignResearc...	09-11-2024 7.0...	09-11-2024 7.1...	Completed with Errors	3	4	View Details
<input checked="" type="checkbox"/> Class Team	ClassTeammigr...	09-10-2024 8.1...	09-10-2024 9.3...	Completed with Errors	4	1	View Details

Step 8 : How to trigger 'Incremental Migration'

- 1) Navigate to Teams -> Tasks -> Completed
- 2) Select the Teams for which you need Incremental Migration
- 4) Click 'Rerun', the Incremental Migration gets executed.

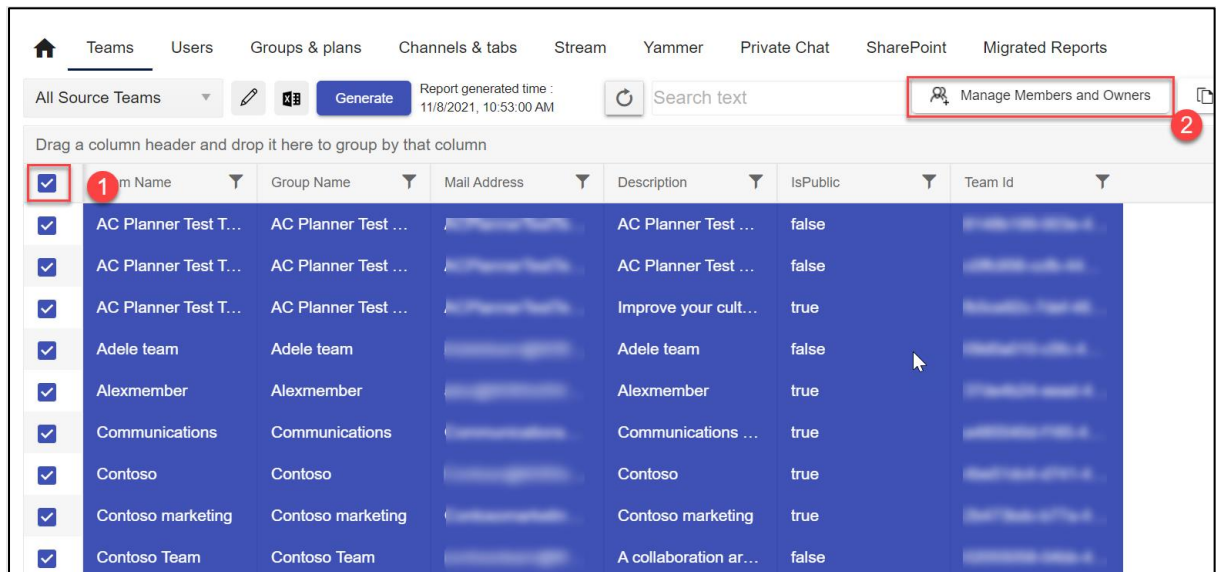
Note : If Status of the task is either *“Completed with Errors / Completed with Warnings”*, please review the errors / warnings with the Support team, before you proceed with the Incremental Migration.



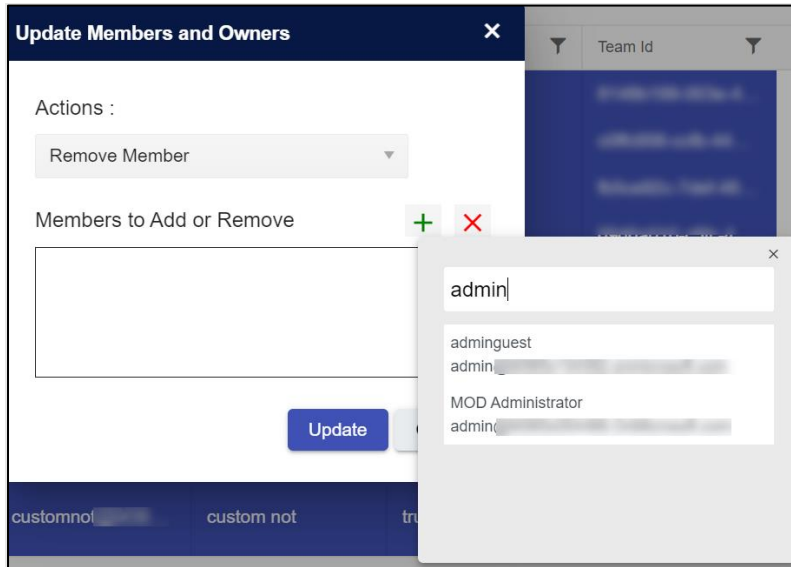
Step 9 : How to Remove 'Source Connector Account' from the Migrated Teams

Once the migration tasks are completed, the 'Source Connector' can be removed from all the teams that were migrated. To achieve this in a single shot, we can remove it by following the below steps.

1. Generate the 'All Source Teams' report by navigating to Plan -> Reports -> All Source Teams.
2. Select All Teams by clicking the checkbox as highlighted below.



3. On clicking "Manage Members and Owners", below pop-up appears.
 - a. Choose 'Remove Member'
 - b. Choose the 'Source Connector' & Update.

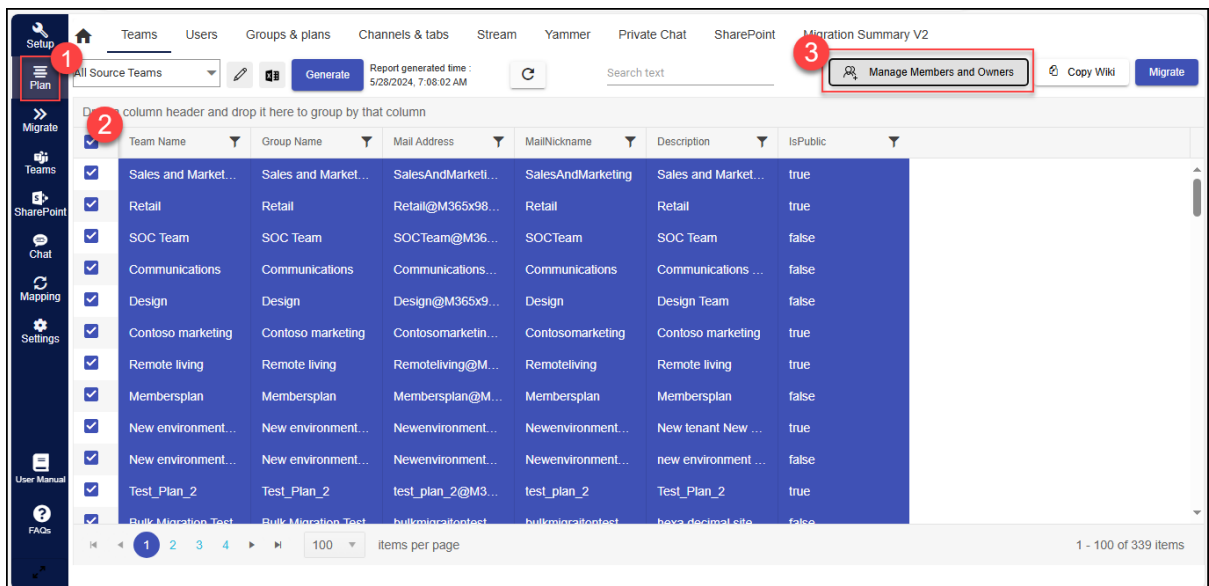


4. Results are shown on if the 'Source Connector' is removed from the selected teams.

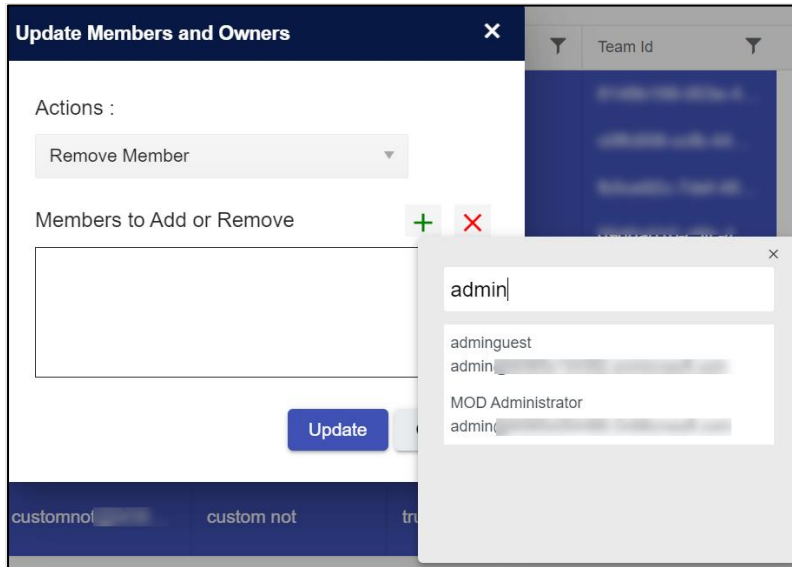
Step 10 : How to Remove 'Target Connector Account' from the Migrated Teams

The 'Target Connector' also is now part of all the target teams migrated. And hence, the 'Target Connector' must be removed from all the teams that were migrated. To achieve this in a single shot, we can remove it by following the below steps.

1. Generate the 'All Target Teams' report by navigating to Plan -> Reports -> All Target Teams.
2. Select All Teams by clicking the checkbox as highlighted below.



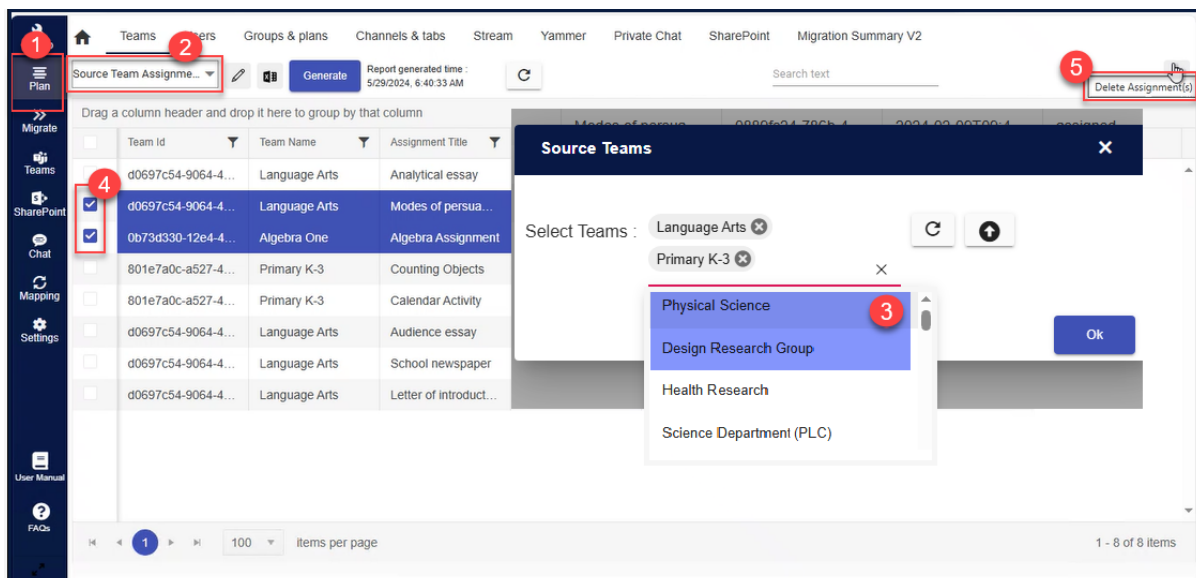
3. On clicking "Manage Members and Owners", below pop-up appears.
 - a. Choose 'Remove Member'
 - b. Choose the 'Target Connector' & Update.



Results are shown on if the 'Target Connector' is removed from the selected teams.

How to delete 'Assignments' from a class Team

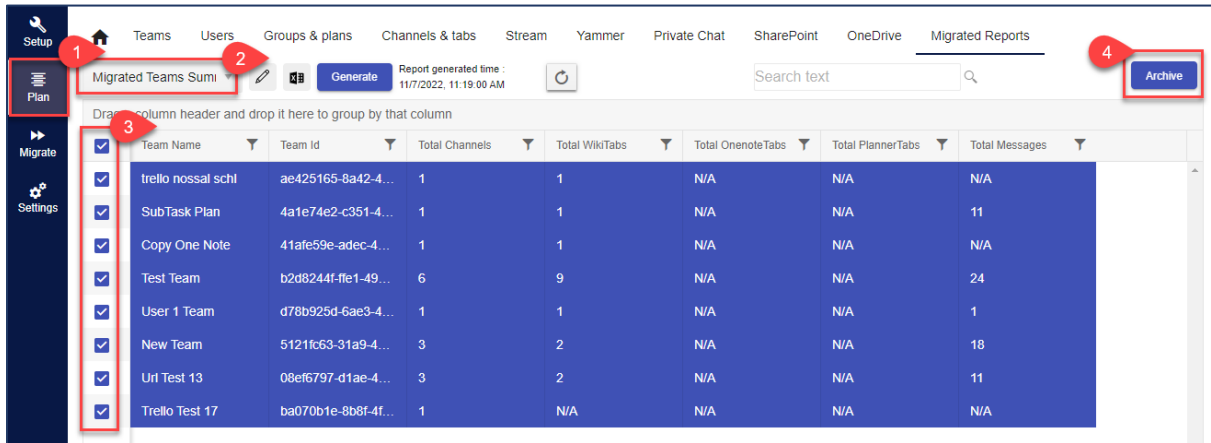
For an education tenant, our tool provides the capability to delete the assignments from a source / target class team. To achieve this, generate the Source Team Assignments / Target Team Assignments report from the Plan tab -> Teams. Then choose the teams, select the assignments to be deleted and click 'Delete'. Please refer the below screenshot.



How to archive 'Source Teams' that are migrated

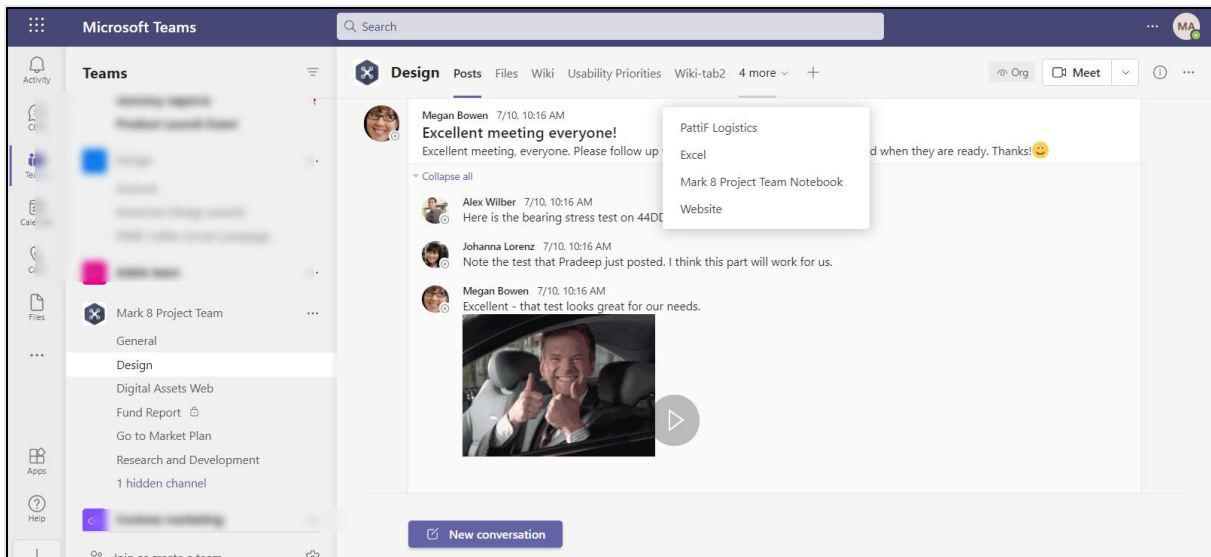
You can very well archive the Teams that has already been migrated via the tool. Please follow the below steps.

1. Navigate to Plan -> Reports -> Migrated Reports -> Migrated Teams Summary
2. Choose the desired teams or all the teams that are listed here and click **Archive**.

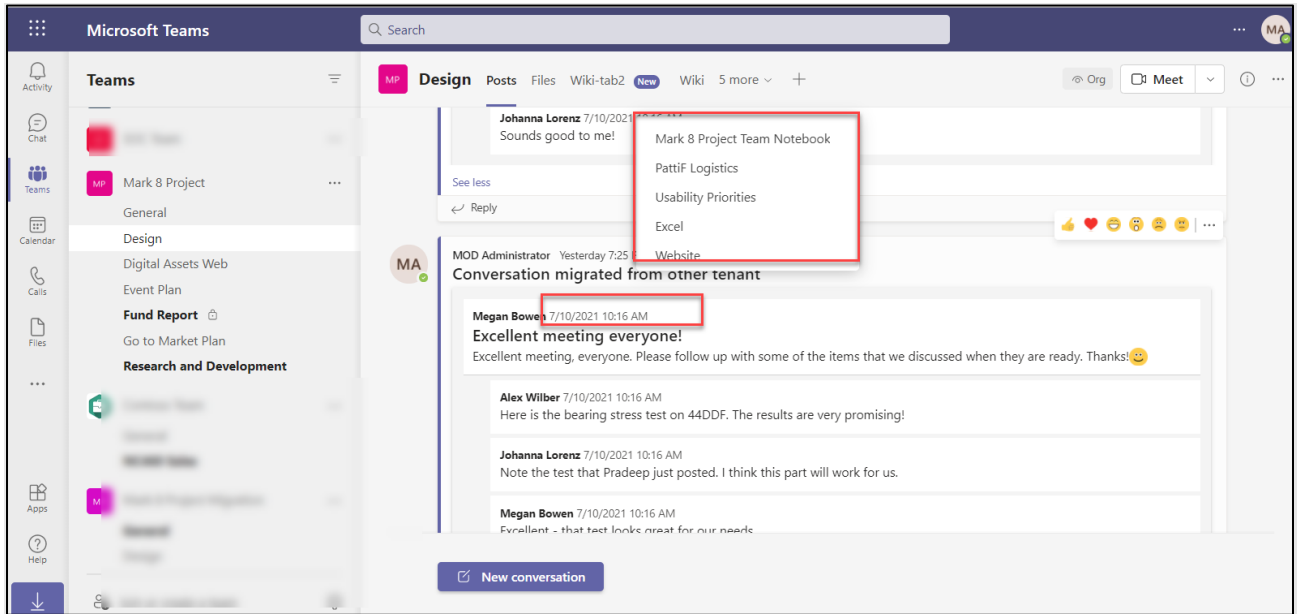


User Experience

Source:

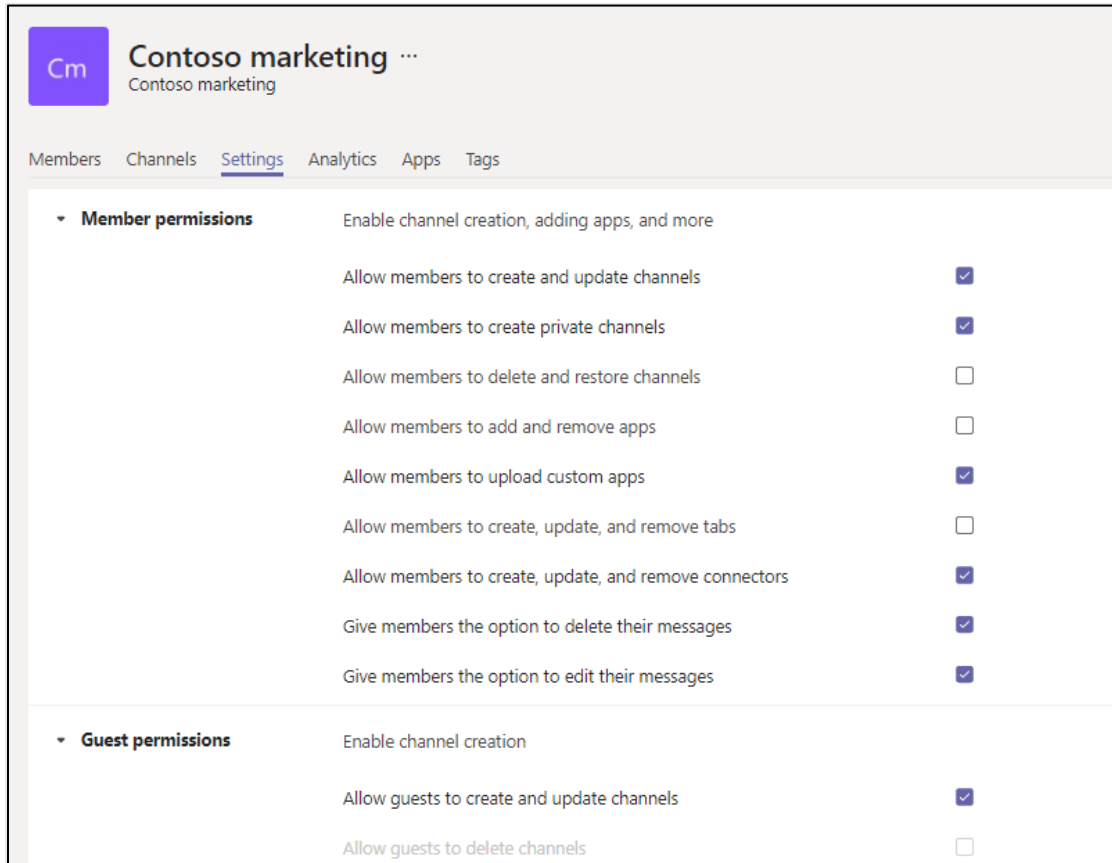


Target:



Migration view of Settings

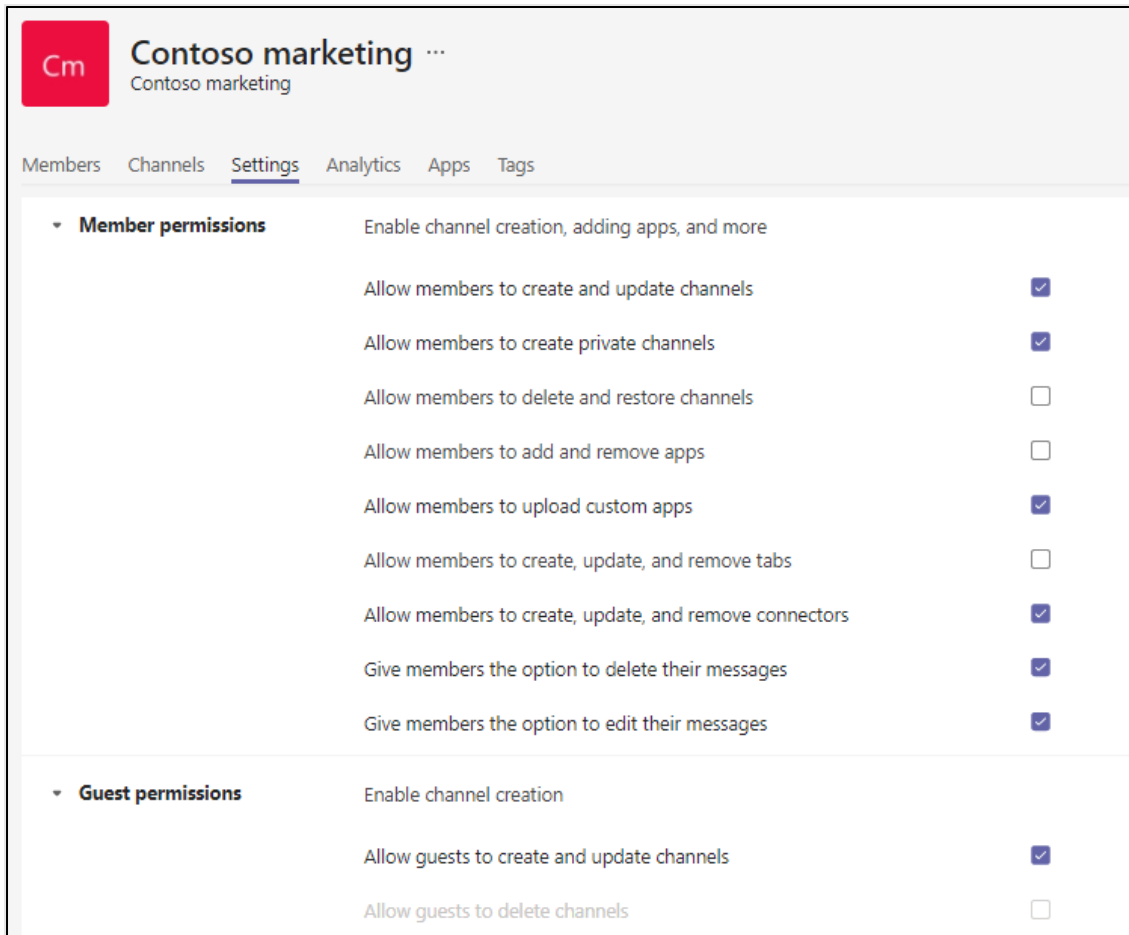
Source:



The screenshot shows the 'Settings' tab for a Microsoft Teams channel named 'Contoso marketing'. The settings are organized into two main sections: 'Member permissions' and 'Guest permissions'. Each section contains a list of permissions with corresponding checkboxes.

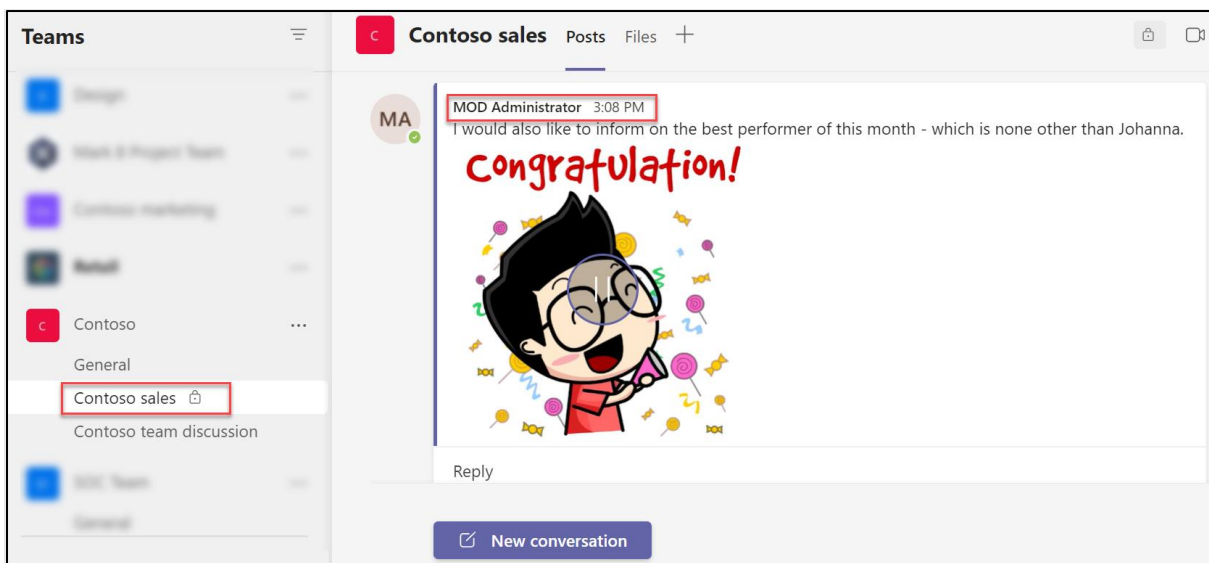
Section	Permission	Status
Member permissions	Enable channel creation, adding apps, and more	
	Allow members to create and update channels	<input checked="" type="checkbox"/>
	Allow members to create private channels	<input checked="" type="checkbox"/>
	Allow members to delete and restore channels	<input type="checkbox"/>
	Allow members to add and remove apps	<input type="checkbox"/>
	Allow members to upload custom apps	<input checked="" type="checkbox"/>
	Allow members to create, update, and remove tabs	<input type="checkbox"/>
	Allow members to create, update, and remove connectors	<input checked="" type="checkbox"/>
	Give members the option to delete their messages	<input checked="" type="checkbox"/>
Give members the option to edit their messages	<input checked="" type="checkbox"/>	
Guest permissions	Enable channel creation	
	Allow guests to create and update channels	<input checked="" type="checkbox"/>
	Allow guests to delete channels	<input type="checkbox"/>

Target:

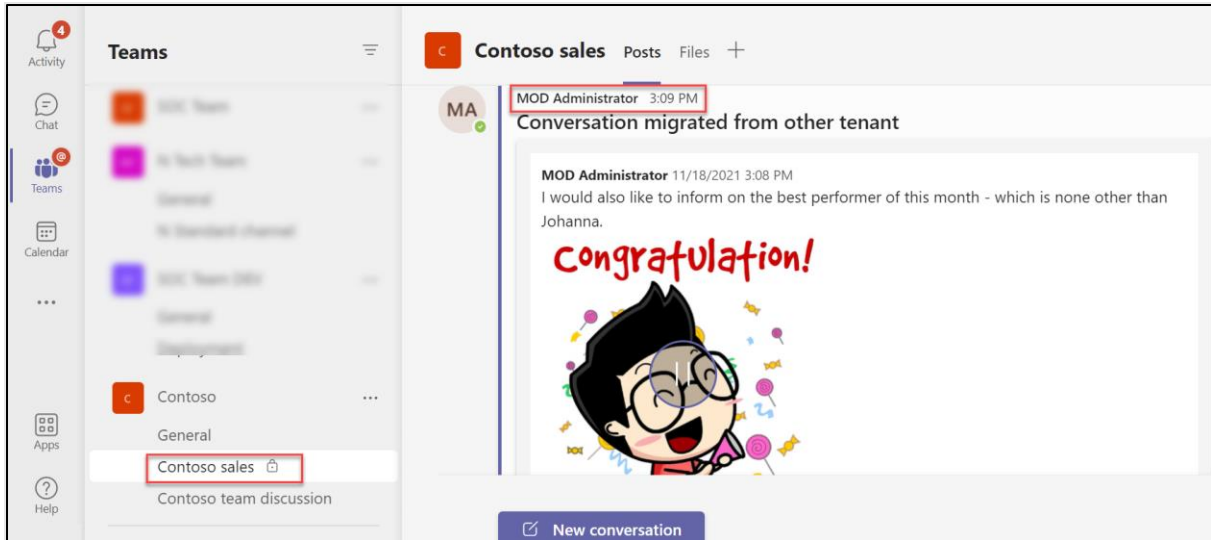


Migration view of Private Channel

Source:

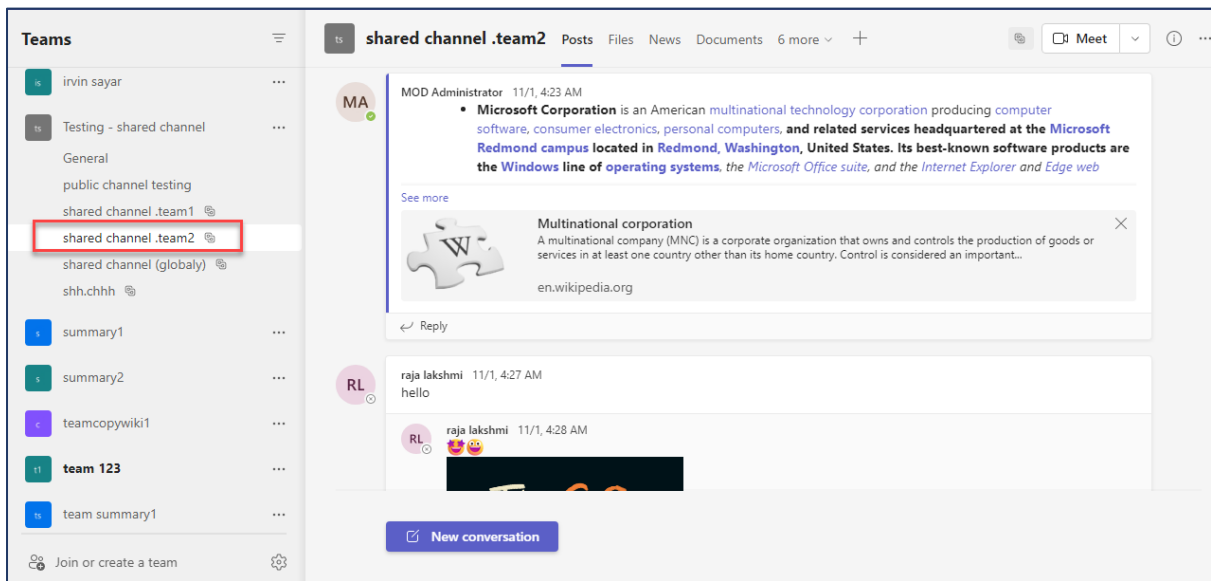


Target:

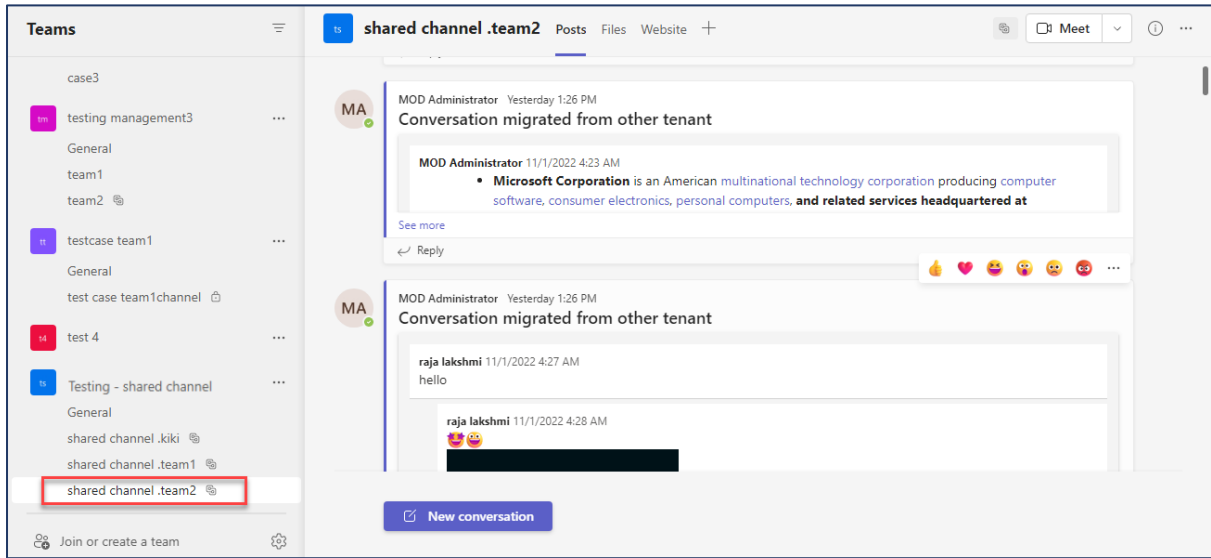


Migration view of Shared Channel

Source:

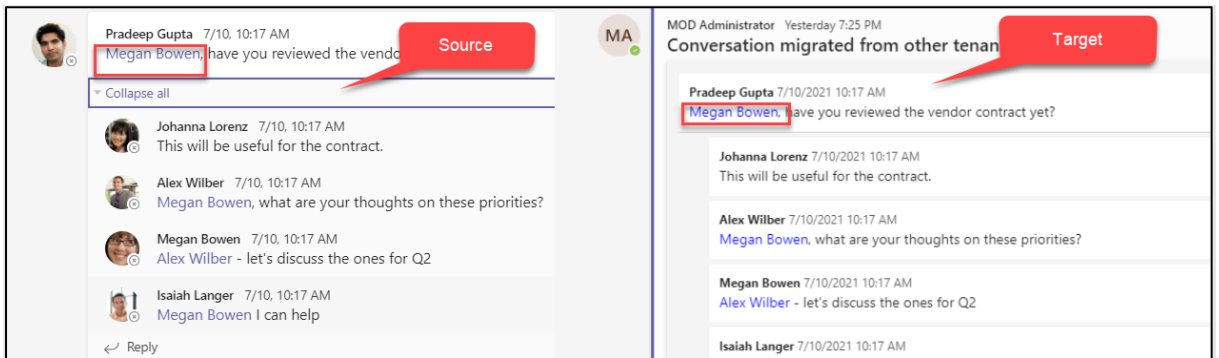


Target:

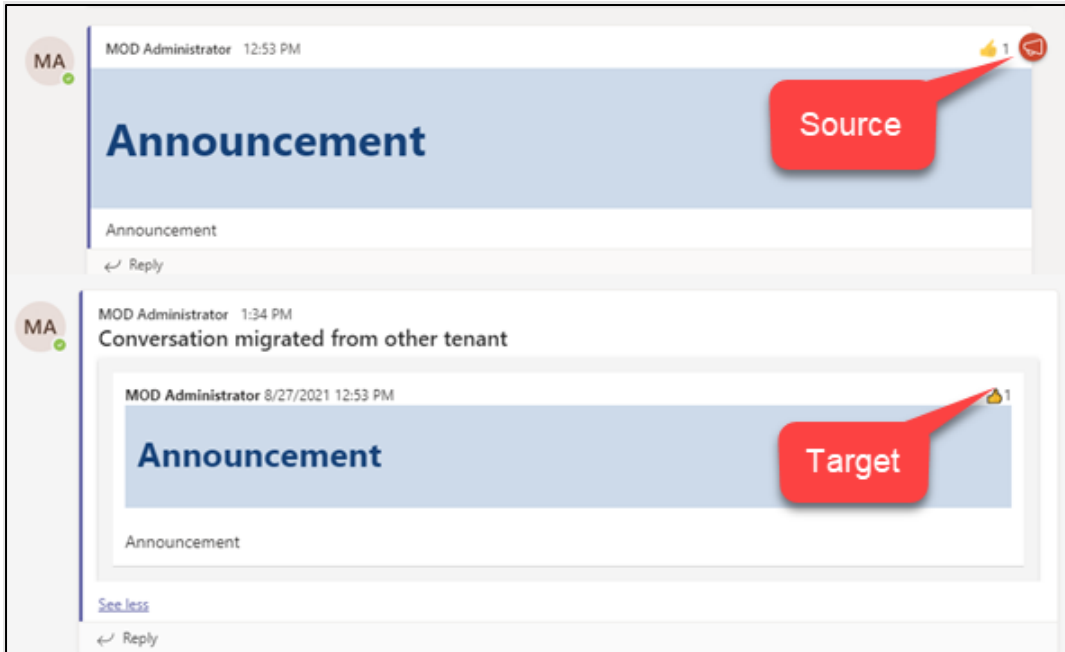


Impact

1. We will migrate the @mention as regular text.

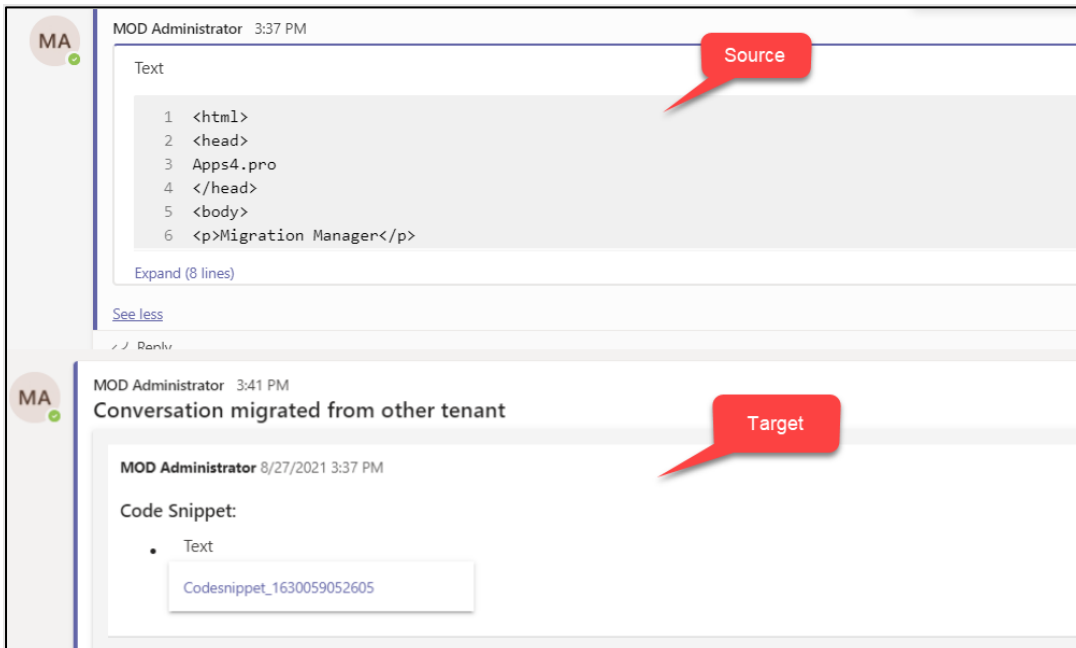


2. Announcement icon will not get migrated.



3. Code snippet :

We will migrate the code snippet as attachment.



4. Delta Sync – Incremental Migration

The following items will not be migrated in the incremental migration

Planner Tab

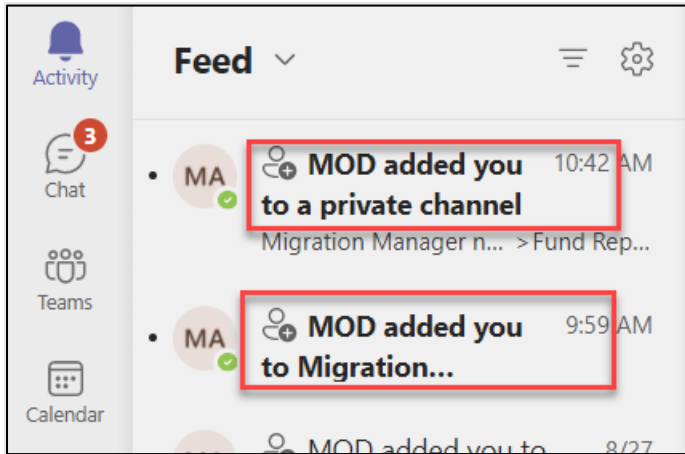
1. Any changes done in an existing Task

Email Notification

Target Team - New

End users will get below notification in Microsoft Teams, when migrating the team’s data to the New Team in target tenant.

- Added You to the team
- Added You to the private channel



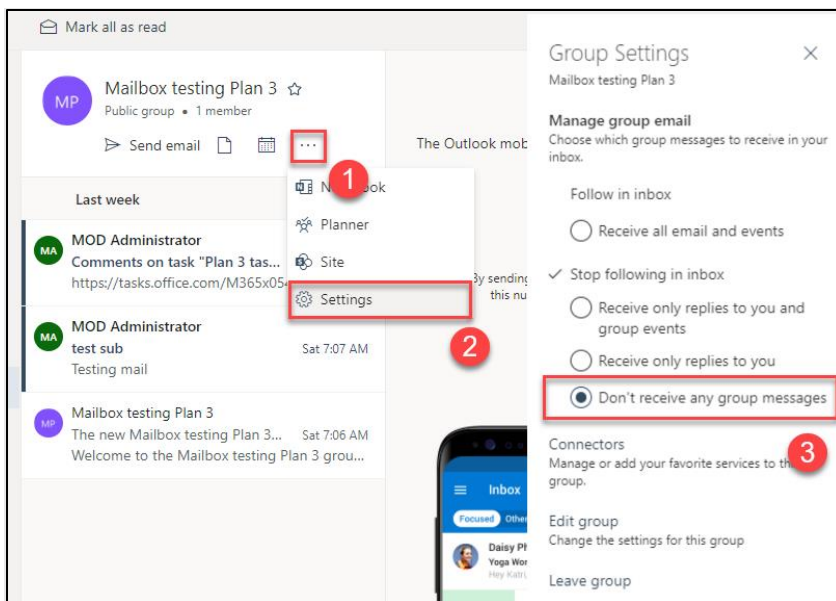
Target Team – Existing - Planner Tab

End user will get notifications when migrating the below stated items in the planner tab.

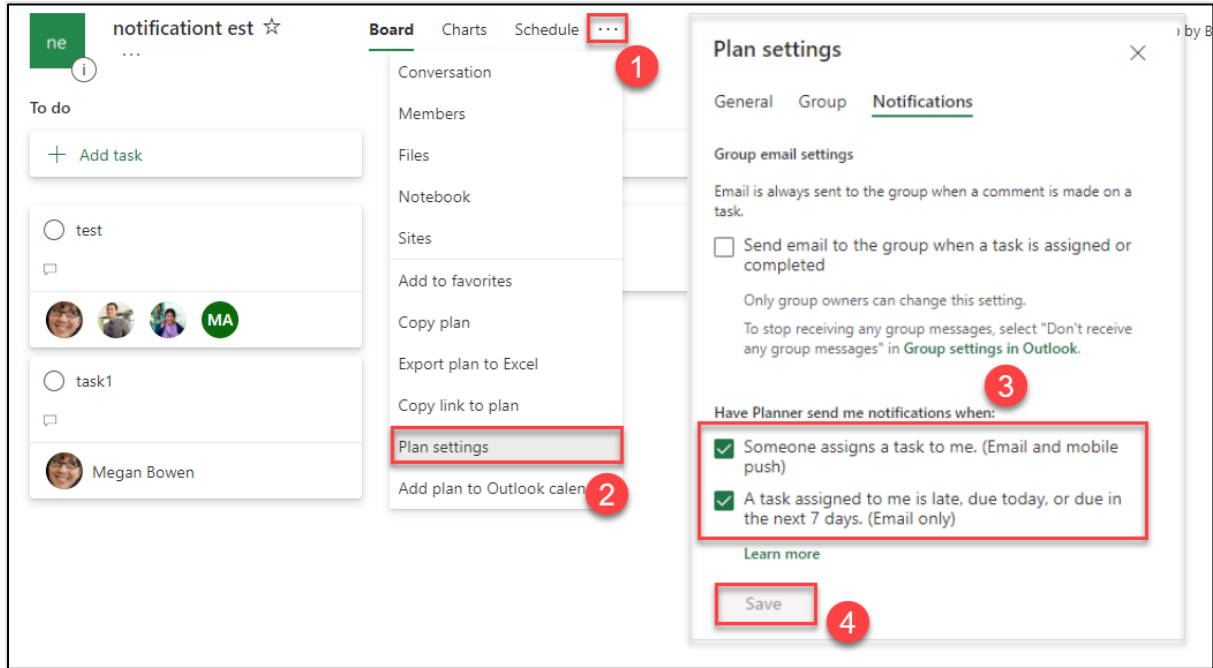
- Comments
- Task Assignments

To avoid these notifications when migrating to Existing Team, **each** end user needs to enable the below settings.

Open the Respective Plans Office 365 group which we are going to migrate in the outlook, then click on settings → Select **Don't receive any group messages**.



Then Go to the Existing plan in the target tenant → Click on more option (...) → Plan Settings → Unselect both settings under “Have Planner send me notifications when”.



Note: However, we can't avoid these notifications, during the plan migration within a **new Team**.

3. Private Chat Migration

How do the chats get migrated as 'Archived Chats'?

Private chats (1:1 and 1: N) gets migrated as **Archived chats** in the target tenant. To achieve this, the app adds the 'Target Connector Account' logged in to the migration app as the member of all the chats (1:1 or 1: N) and migrates the chats as archived chats in target tenant. Please ensure you have used the authenticated account to sign into the migration app Target connection before running the migration tasks.

Step 1 : Setup & Configuration

Setup : License and Roles

1. **Microsoft 365/Office 365(E3 or E5) License** is required for Source & Target Connector Accounts.
2. **Microsoft Teams license** is required for both Source & Target Connector Accounts.
3. **Admin consent and Application Permission** is required for Source Connector Account.
4. **Delegated Permission** is required for Target Connector Account.
5. **Secondary Admin Privilege** is required for the Target users' OneDrive when attachments have to be migrated.

Admin Consent & Delegate Permission: For non-Global Administrators

Admin must provide Admin Consent & Delegate Permission just by clicking a link. Please contact support@jijitechnologies.com for further details.

Configuration: Connector Accounts – Sign-in

Perform the Source & Target Connector Accounts Sign-in as shown in *Global Configuration section*.

Additional Configuration: Additional Connector Accounts – Sign-in

Perform the additional Source & Target Accounts Sign-in as shown in *Additional Configuration section*.

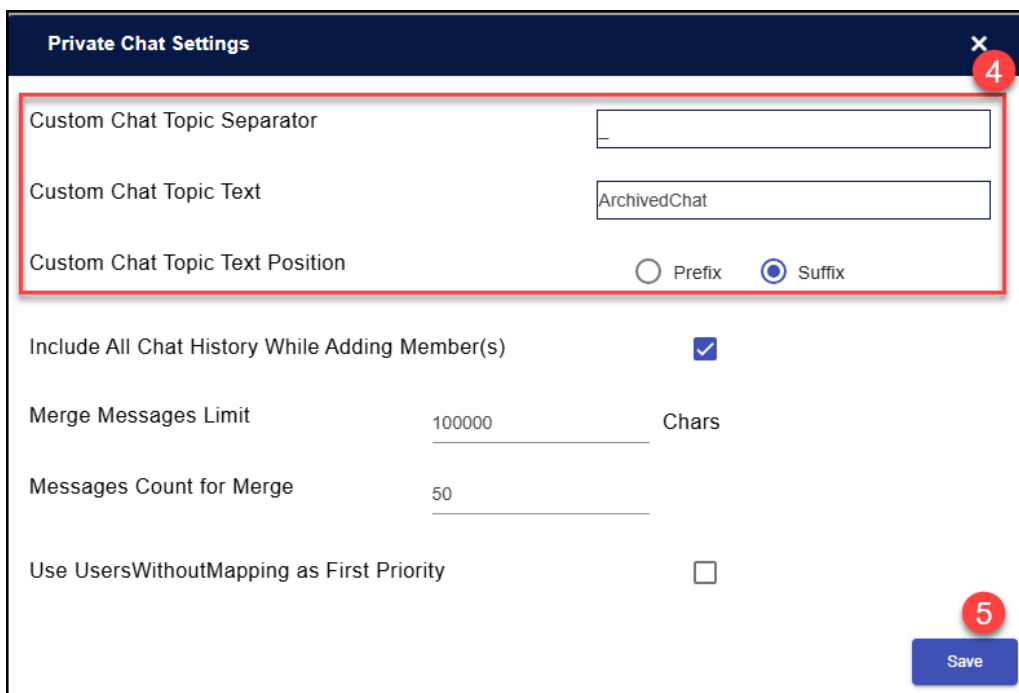
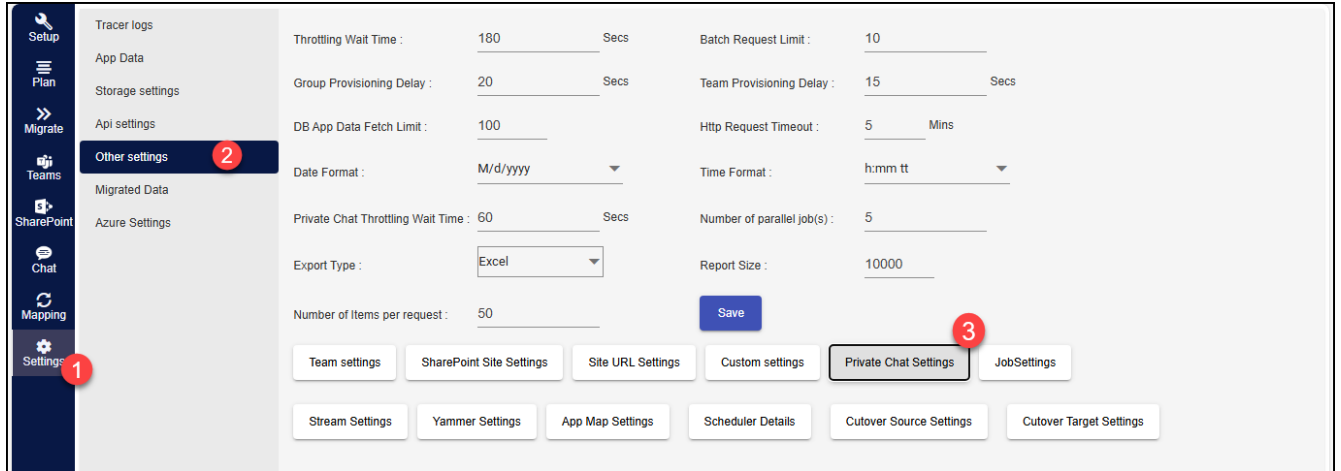
Mapping: Application User Mapping

Perform the Application-level User Mapping as shown in *Application User Mapping section*.

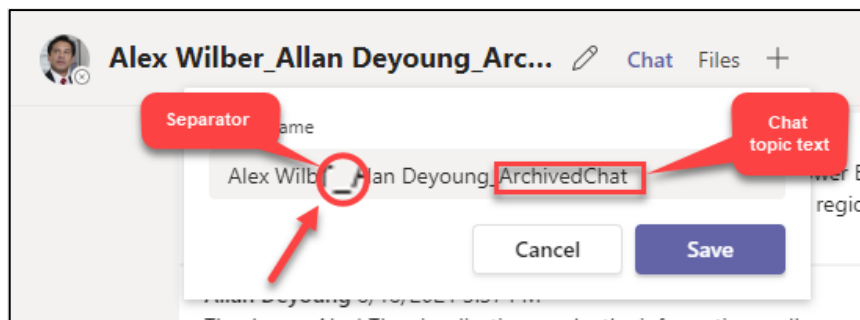
Step 2: Private Chat Settings

Chat Topic Separator & Position

As the chats are migrated as Archived Chats, the app will create chat titles with the participant names in the chat. It will appear in the format "**Alex Wilber_Megan Bowen_ArchivedChat**". To customize this format, follow the steps as mentioned in below screenshot.



Custom Chat topic Separator, text and topic text position can be customized.



Merge Messages Settings

When you to migrate the messages in Merged fashion, You can configure the characters & message count in **Settings -> Other Settings -> Private Chat Settings**.

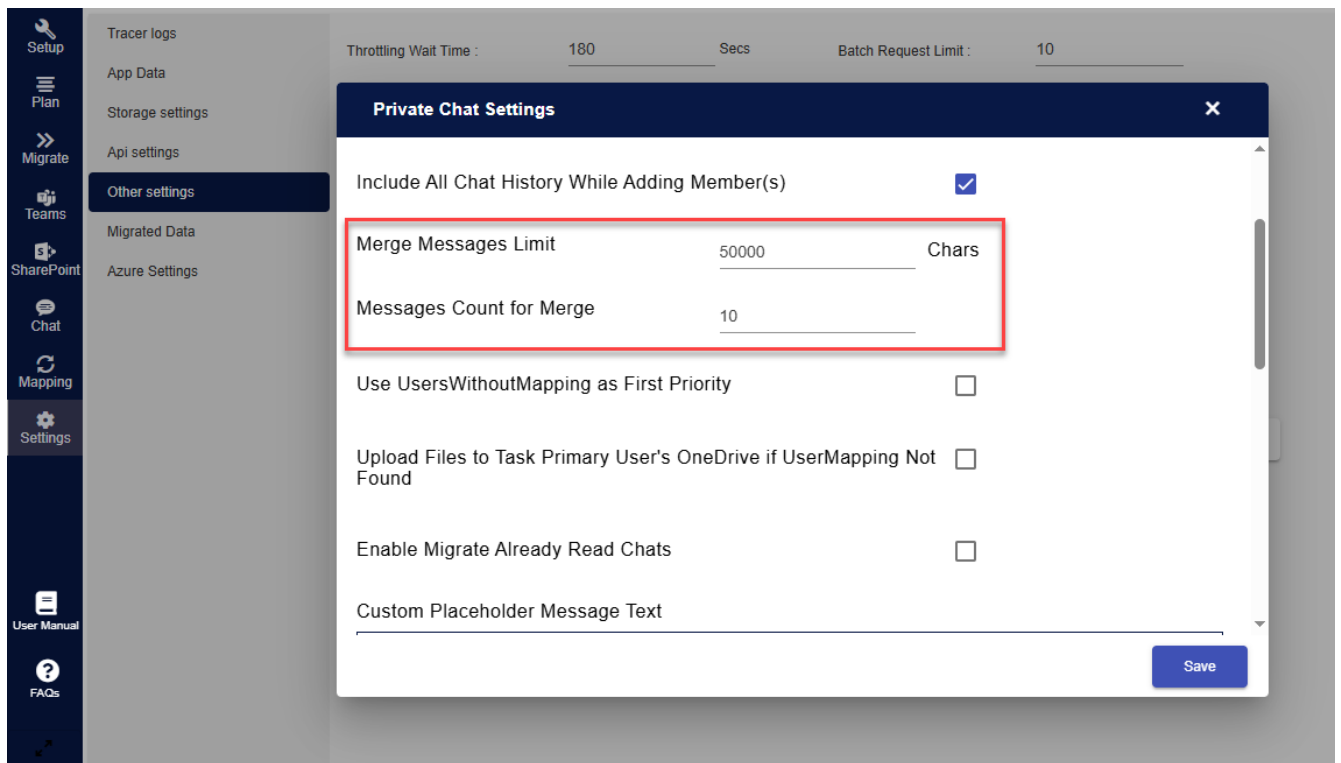
Please refer the below screenshot. The values displayed here are the default values.

The maximum limit recommended by the tool would be

Merge Messages Limit : 50,000 Chars

Messages Count for Merge : 50

Note : When you do not want to post your Messages in a Merged fashion, set the 'Messages Count for Merge' as '1'

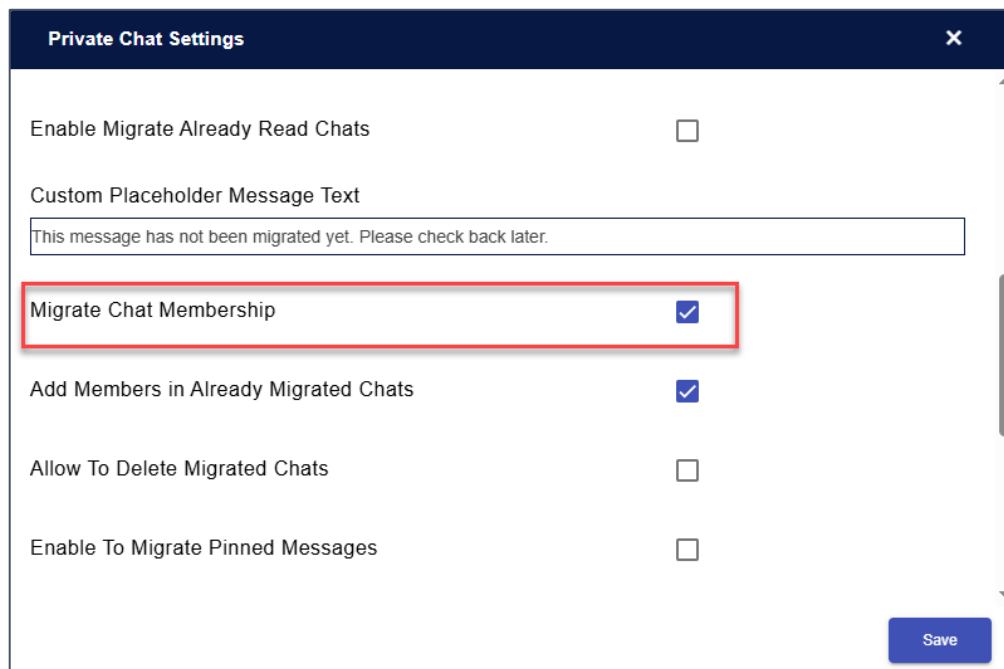
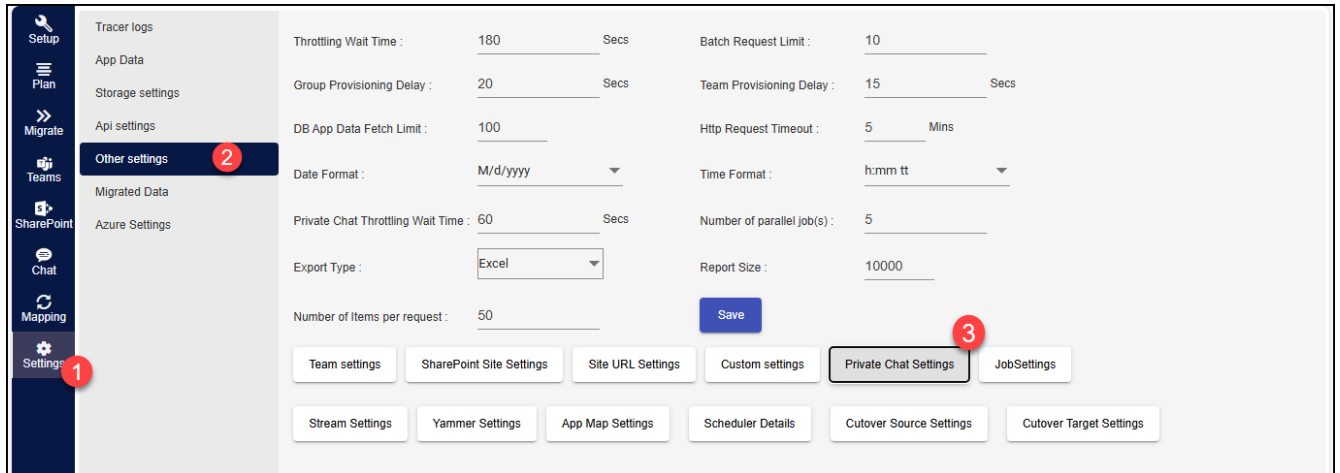


Skip "Migrate Chat Membership" during Initial Migration [OPTIONAL]

When you migrate the chat memberships in the first place, the members of the chat will keep receiving notifications during the migration. In order to avoid these notifications, **disable the option "Migrate Chat Membership" before the Initial Migration**. It is Enabled by DEFAULT.

You can **migrate the memberships at a later point post the Migration is completed**, by just

- Enabling the option "Migrate Chat Membership"



File Attachment (OneDrive) Migration Settings

We have three options related to the Attachment Migration Settings. You can choose any one by navigating to **Settings -> Other settings -> Private Chat Settings.**

Option 1: Keep Source URL: Conversation Attachments not migrated, instead Source URL is retained.

Go for this option, when you

- Already migrated the attachments/files,
- Do not want App4.Pro to migrate them &
- Want to retain Source URL in the Conversation attachments

Option 2: Replace Target Domain in Source URL: Conversation Attachments not migrated; it will replace the Target Domain (configured in the Domain [Cut-Over settings](#)) in the Source URL.

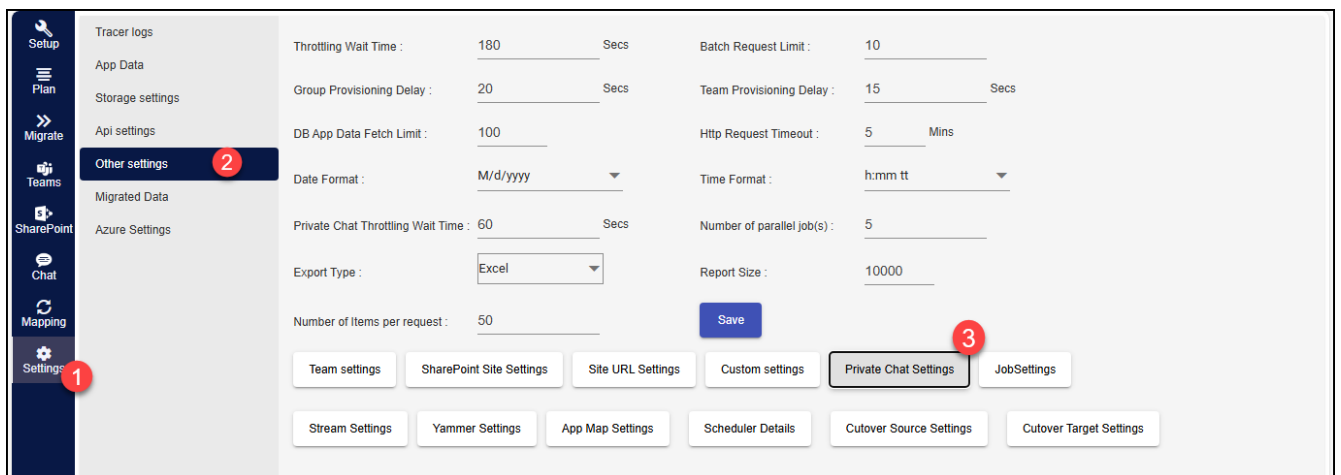
Go for this option, when you

- Already migrated the attachments/files,
- Do not want App4.Pro to migrate them &
- Want to Replace Target Domain in Source URL in the Conversation attachments

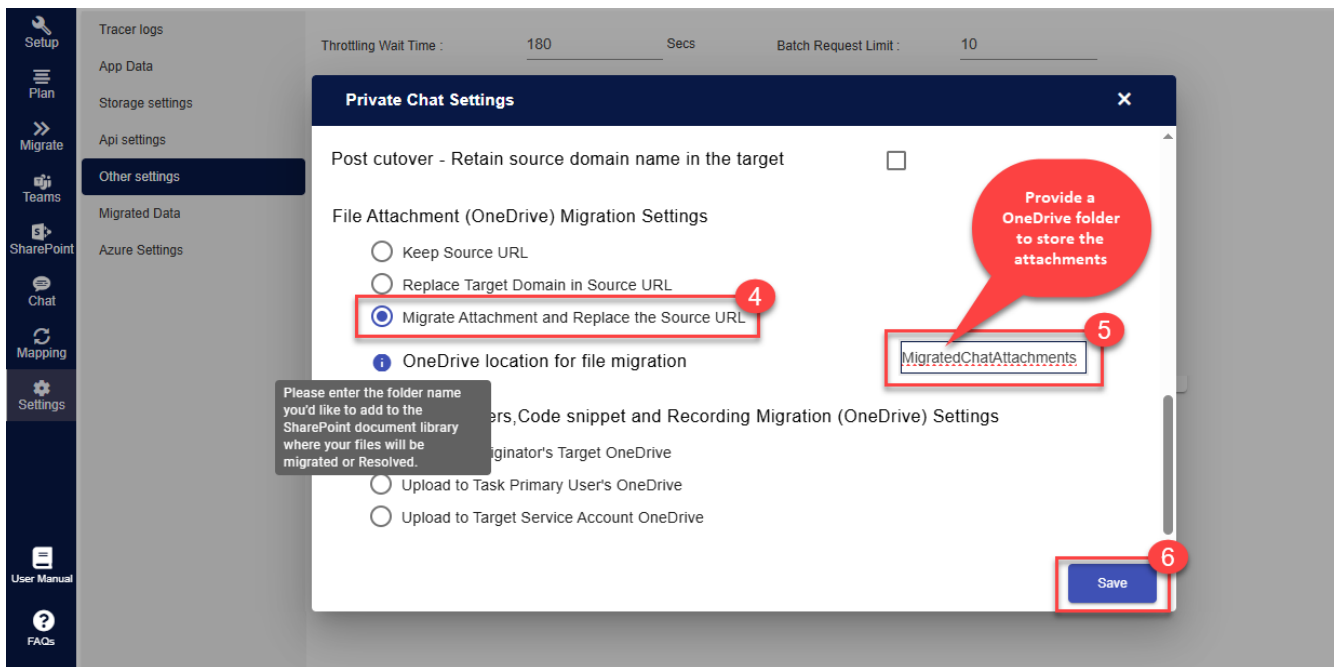
Option 3 [DEFAULT]: Migrate Attachment and Replace the Source URL: Conversation Attachments are migrated, and the URLs are replaced with Target Domain (configured in the Domain [Cut-Over settings](#)) in the Source URL.

Go for this option, when you want

- App4.Pro to migrate the Conversation attachments &
- To Replace Target Domain in Source URL in the Conversation attachments



OneDrive Location for file migration : You can also provide a custom OneDrive folder to store the attachments.

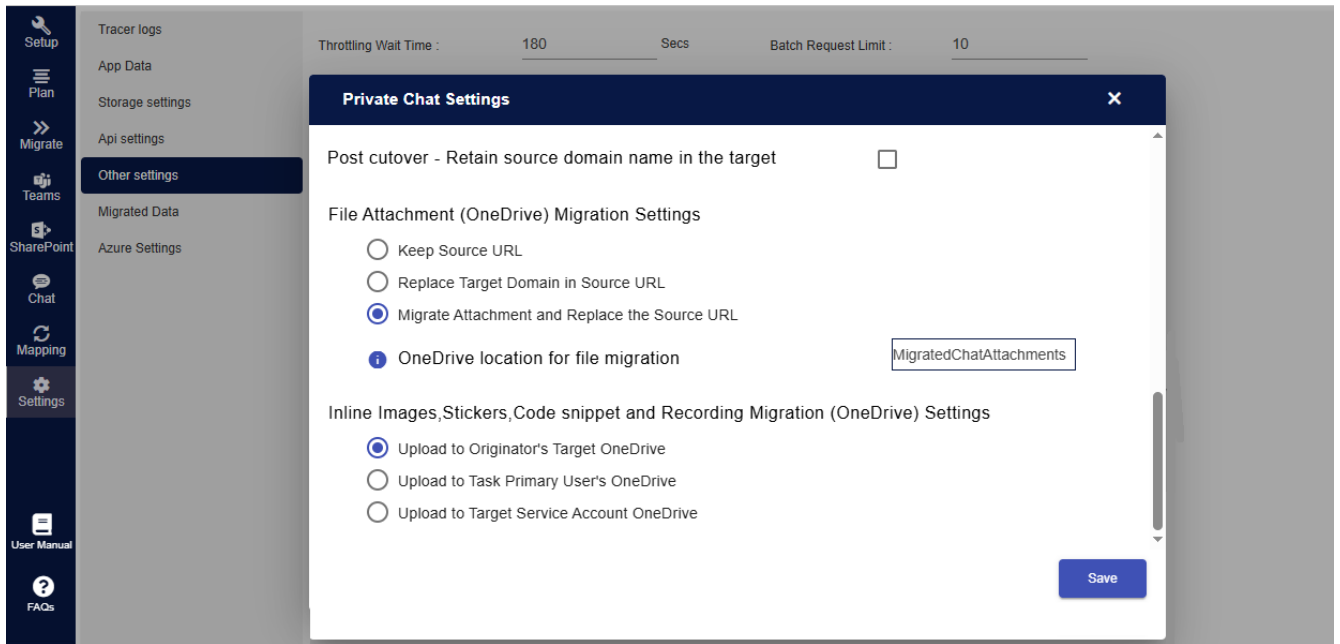


Inline Images, Stickers, Code snippet and Recording Migration (OneDrive) Settings

We have three options related to this. You can choose any one by navigating to

Settings -> Other settings -> Private Chat Settings.

Option #	Option	Inline Images, Stickers, Code snippet and Recording are stored in
1	Upload to Originator's Target OneDrive	OneDrive of the Chat Originator
2	Upload to Task Primary User's OneDrive	OneDrive of the User selected for migration
3	Upload to Target Service Account OneDrive	OneDrive of the Target Service Account



Step 3: Cutover Settings [Domain Switch]

During chat migration, the app will include the shared link of the files in the chats. This setting is required in order to retain the workable URL after the tenant cut-over (Domain switch). Based on the below migration scenarios, you can perform the required settings in the app.

Scenario	Setting to be performed
Same source domain name will be moved to the target (Single domain) Ex: abc.com > abc.com OR Same source domain(s) name will be moved to the target (in case source has multiple domains)	Go to Settings > Other Settings > Private chat settings > Enable 'Post Cutover - Retain source domain name in the target'. [Reference: Image1]

Source tenant name will not be moved to the target Ex: abc.com > xyz.com	Go to Settings > Other settings > Target cutover settings and provide domain names before and after cutover. [Reference: Image 2 and Image 2.1]
---	---

Image 1:

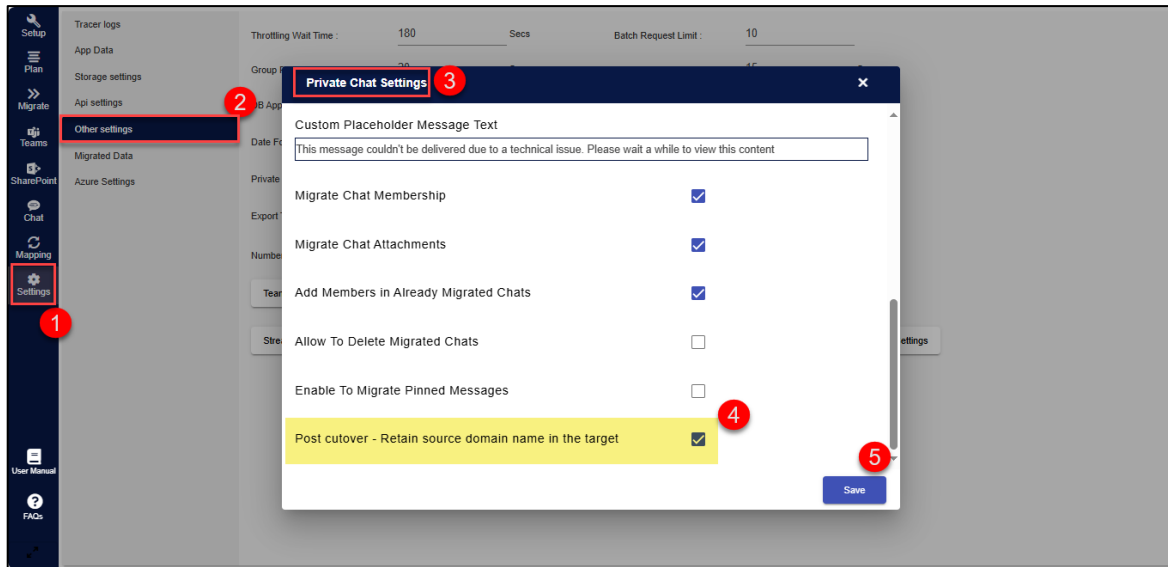


Image 2 :

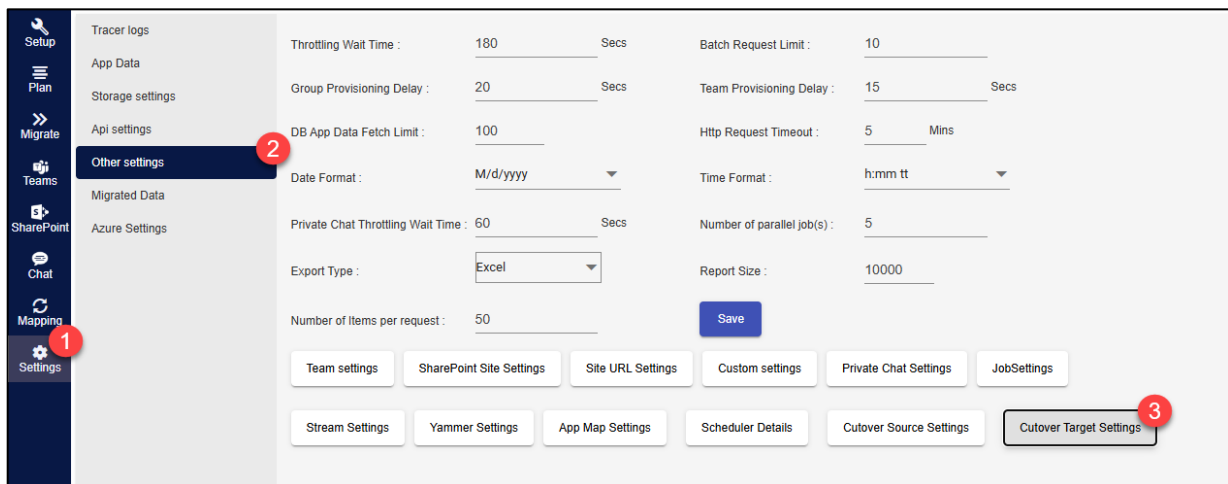


Image 2.1 :



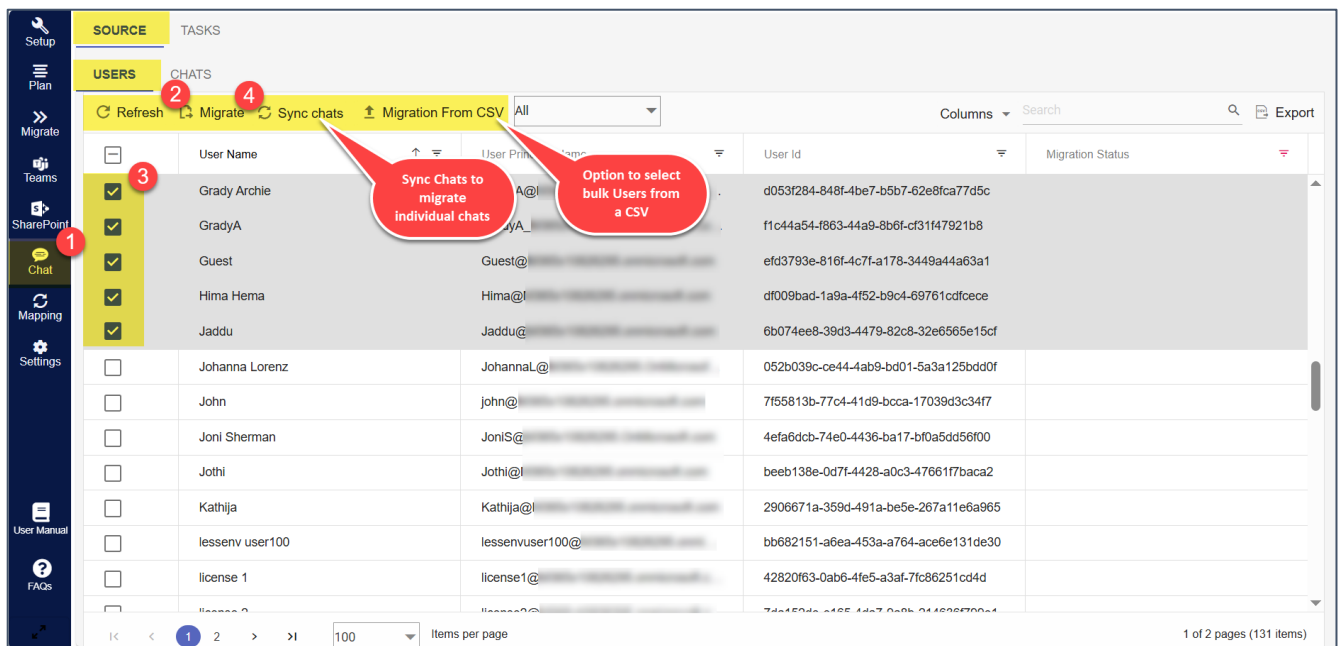
Step 4: Create Task

Migration of Chats for Enterprise License

Follow the below steps to create a task

- 1) Navigate to 'Chat' tab.
- 2) Navigate to Source -> Users.
- 3) Hit 'Refresh' to load the users.
- 4) Select the Users whose chats to be migrated.
- 5) Click **Migrate**.

Note: Please ensure the selected source tenant users are mapped with target tenant users. Also ensure that you have provided the user mapping for all the required source tenant users in the "Application Users Mapping" which is located in the "Mapping" tab.



Migration from CSV: Select a bunch of Users in a single shot using this option.

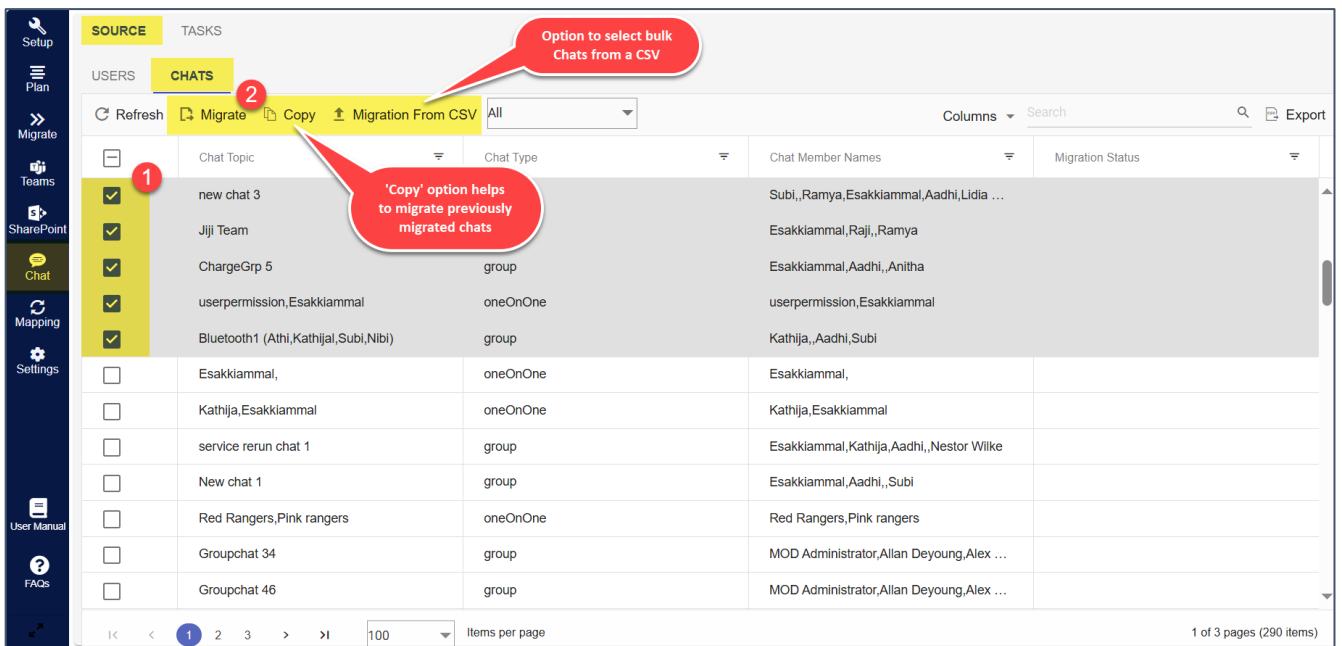
You can **Browse** for a CSV containing the details of the Users' whose chats to be Migrated.

Sample CSV:

SourceUserMail	SourceUserId	SourceUserName
Alex@contosa.com	4c82aeda-f296-43a9-a80a-c789216976b4	Alex
Allan@contosa.com	4918c791-3b78-4353-8ad2-41f2073bfe3b	Allan
Megan@contosa.com	73de47bc-ac48-41ea-b45d-740a1370d6e0	Megan
AllanD@contosa.com	481e7bd8-1a29-4bff-9974-74b53fd5865d	AllanD

Sync Chats : Migrate Individual Chats using this option. Choosing which, populates the chats of the selected users in the 'CHATS' tab as below.

Here, you can choose the individual chats and migrate them. In addition, you can use Option 'Copy' to migrate the previously migrated chats.



Step 5: Migration Settings

You can also choose the below settings for the Private Chat Migration

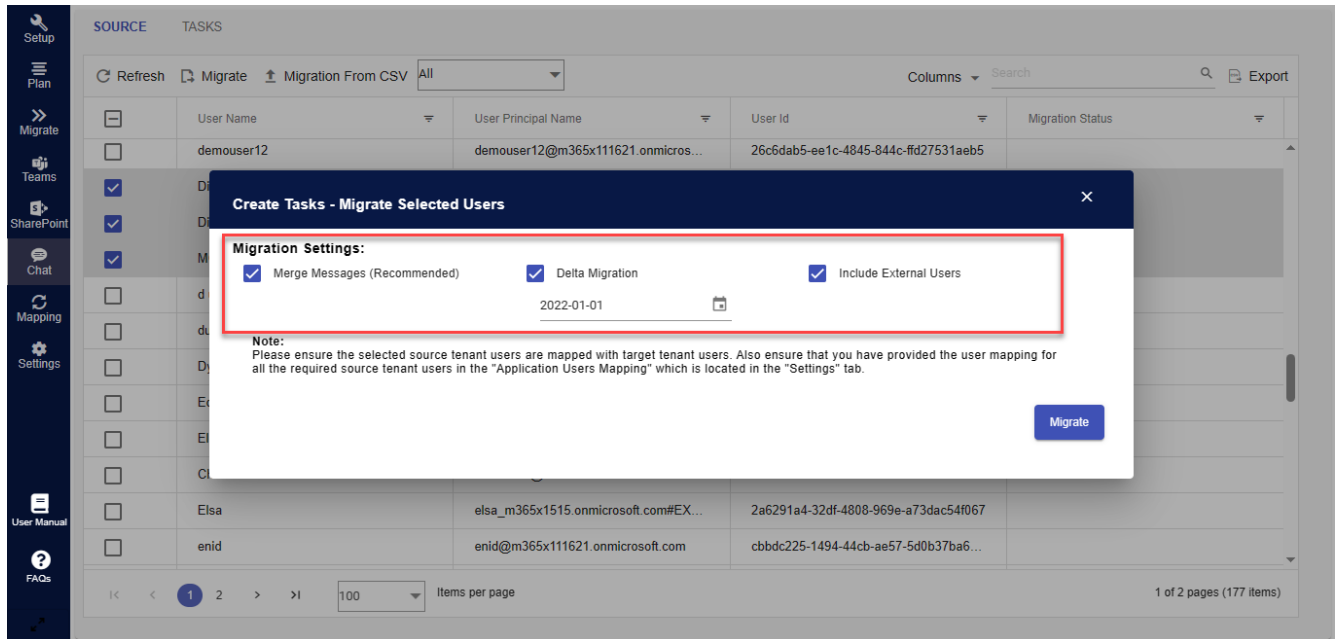
- ✓ **Merge Messages:** It is enabled by default and the recommended approach. It merges multiple messages (based on the count set for 'Messages Count for Merge') and post them to the target in a single shot. Please refer to [Merge Messages Settings](#).
Merging the messages speeds up the Migration process. But in other hand, it could pester the search experience as multiple messages are posted as a single one.

Post as single Messages : The user can also opt to post as a single message by setting the 'Messages Count for Merge' to '1'. Please refer to [Merge Messages Settings](#).

Posting as single message makes the migration process slower but ends up in an effective search experience post migration.

- ✓ **Delta Migration:** You can choose to migrate the chats from a particular date by choosing the 'Delta Migration' Option.
- ✓ **Include External Users [OPTIONAL]:** You can choose to include the external users to the migrated target chats – 'chats with people from different domains' by selecting the option as below.

Note: All external users who have been added to the migrated target chats will receive notification of the migration if this parameter is enabled.

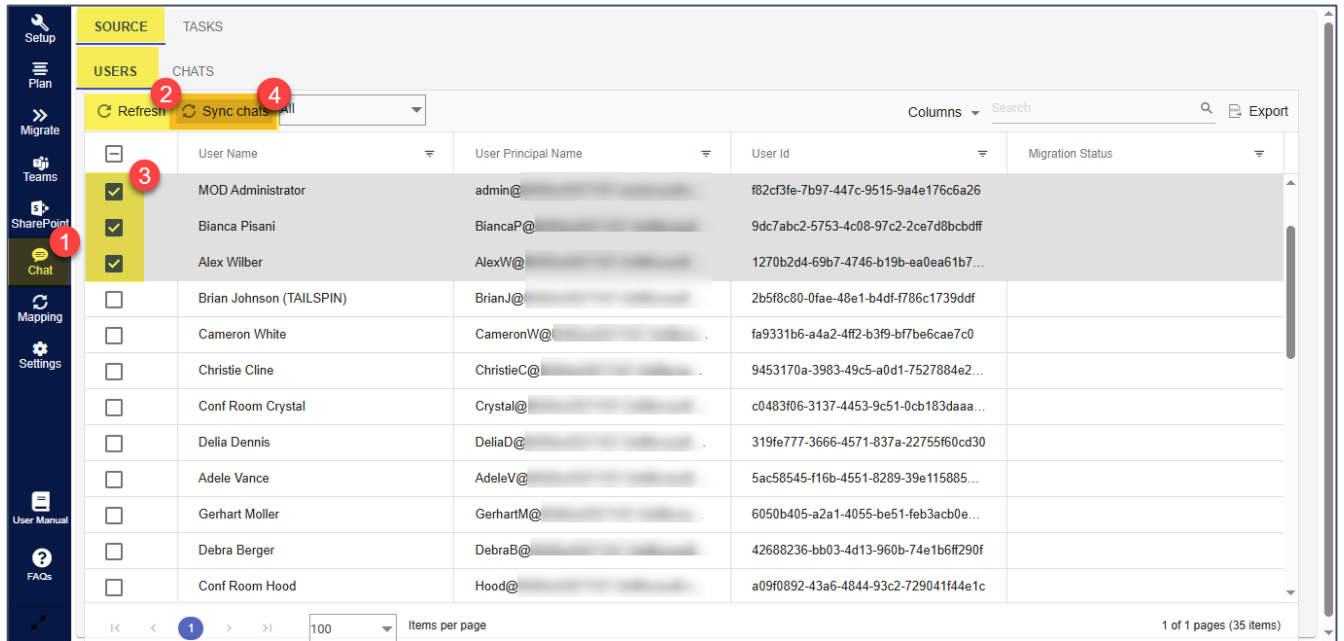


Click 'Migrate' to proceed further.

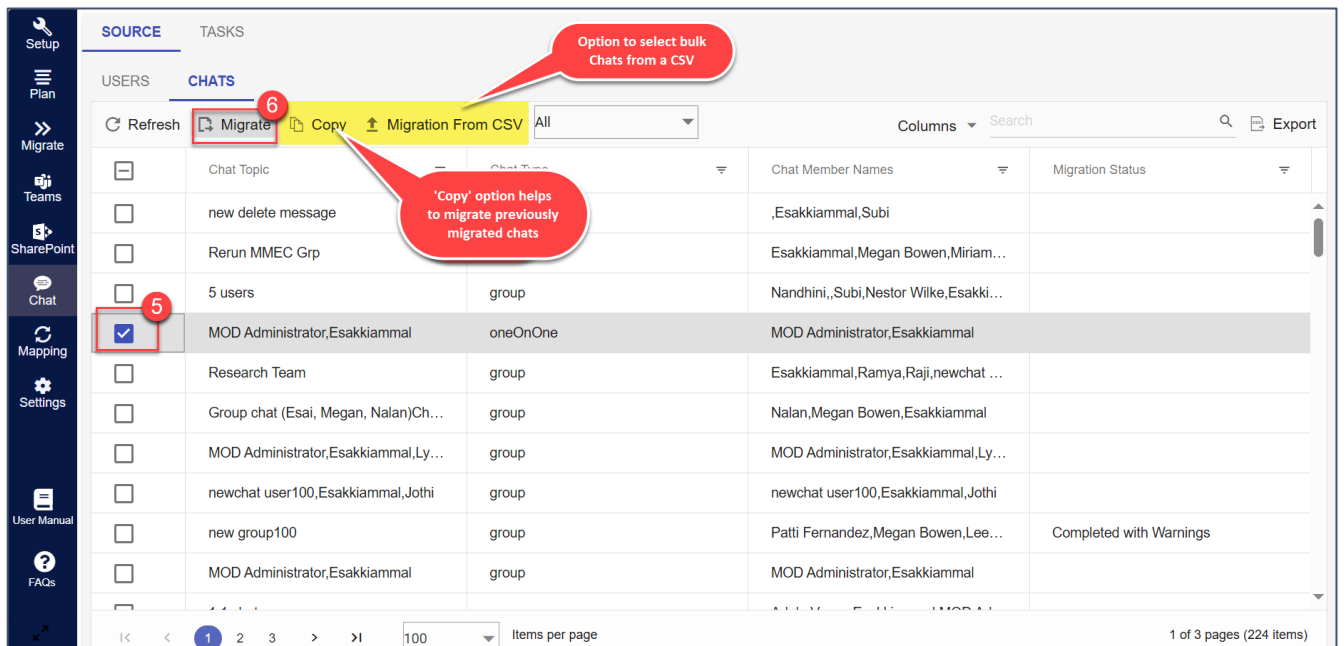
Migration of Chats for Trial License

The Migration of Chats follow slightly different flow in case of Trial License.

Step 1 : Under 'Chat' tab, choose Users whose chats has to be Migrated and click 'Sync Chats'



Step 2 : Choose the chats to be migrated and click 'Migrate'. Please note that only 1:1 chat can be migrated, **Meeting & Group Chats are out of scope for Trial License.**



Migration from CSV :

The Chats can be migrated using 'Migration from CSV' option also.

Chats uploaded through CSV

Migration From CSV ✕

Select the CSV File: Browse 📄 Sample CSV Migrate Chat Copy Chat

Migration Settings:

Merge Messages (Recommended) Delta Migration Include External Users

Note:
Please ensure the selected source tenant users are mapped with target tenant users. Also ensure that you have provided the user mapping for all the required source tenant users in the "Application Users Mapping" which is located in the "Mapping" tab.

Source Chat Topic	Source Chat Id	Available Status
Rerun MMEC Grp	19:ea8bbf964d584d90aa23090796e83...	Found
5 users	19:a28bbec187fe4a9091a00b40b5aac...	Found
MOD Administrator,Esakkiammal	19:9a78d635-b8c8-4bcc-bb0d-593ad0...	Found

Migrate

Sample CSV

	A	B
1	ChatTopic	SourceChatId
2	Alex,Allan	4c82aeda-f296-43a9-a80a-c789216976b4
3	Allan,Megan	4918c791-3b78-4353-8ad2-41f2073bfe3b
4	MondayMeeting	73de47bc-ac48-41ea-b45d-740a1370d6e0
5	Support	481e7bd8-1a29-4bff-9974-74b53fd5865d
6		

Step 6 : Task Execution

In this step, you can view the list of the Users queued up for Migration. The task gets triggered automatically.

SOURCE
TASKS

QUEUED
DRAFTS
INPROGRESS
STOPPED
DELETED
ALL

🔄 Refresh
✎ Edit
⬆️ Priority
✖️ Cancel
Task Option ▾
Columns ▾ Search 🔍
📄 Export
📄 Export Logs

	Name	Original Name	Created TI...	Last RunTI...	Status	Queued A...	Prio
<input type="checkbox"/>	Adele Vance	Adele Vance	09-11-2024 7:1...	09-11-2024 7:1...	NotStarted	Start	1
<input type="checkbox"/>	Grady Archie	Grady Archie	09-11-2024 7:1...	09-11-2024 7:1...	NotStarted	Start	2
<input type="checkbox"/>	Irvin Sayers	Irvin Sayers	09-11-2024 7:1...	09-11-2024 7:1...	NotStarted	Start	3

If the Target Connector does not possess Secondary admin privileges over a Target User, then the Task completes with Errors.

You can download script to provide Secondary admin privileges, with the Option “OneDrive Access Provisioned” as depicted below.

The screenshot shows the 'TASKS' section of the migration tool. A table lists various migration tasks with columns for Task Name, User Principal Name, Created Time, and Last Run Time. A dropdown menu is open over the table, showing options like 'Mapping Not Found Users', 'License Not Found Users', and 'OneDrive Access Provisioned' (highlighted in yellow). Red callout numbers 1 through 5 are placed on the interface to highlight specific elements.

Task Name	User Principal Name	Created Time	Last Run Time	Status	Count
Adele Vance	AdeleV@M365x10826295.OnMicrosoft.com	09-11-2024 7:1...	09-11-2024 7:2...	Completed with ...	1
Domain case us...	Domaincaseuser@M365x10826295.onmicrosoft.com	09-10-2024 11:...	09-10-2024 11:...	Completed with ...	0
Esakkiammal	Esakkiammal@M365x10826295.onmicrosoft.com	09-09-2024 5:2...	09-11-2024 5:4...	Completed with ...	0
Grady Archie	GradyA@M365x10826295.OnMicrosoft.com	09-11-2024 7:1...	09-11-2024 7:2...	Completed with ...	0
Irvin Sayers	IrvinS@M365x10826295.OnMicrosoft.com	09-11-2024 7:1...	09-11-2024 7:2...	Completed with ...	0
new yamuser1	newyamuser1@M365x10826295.onmicrosoft.com	09-10-2024 1:0...	09-10-2024 1:0...	Completed with ...	0
Nila	Nila@M365x10826295.onmicrosoft.com	09-10-2024 4:0...	09-10-2024 4:0...	Completed with ...	0
Universe	Universe@M365x10826295.onmicrosoft.com	09-09-2024 9:1...	09-10-2024 4:1...	Completed with ...	0
User setting1	Usersetting1@M365x10826295.onmicrosoft.com	09-09-2024 6:3...	09-11-2024 5:5...	Completed with ...	0

The dialog box titled 'OneDrive Access Provisioned' contains the following text: 'The Target Connector Account do not have required permission (Secondary Admin) in the following OneDrive Account(s)'. Below this, it lists the 'Target Connector Account: admin@...' and a table of affected users.

Target Tenant User	Task User Name
saliha@l...	Universe

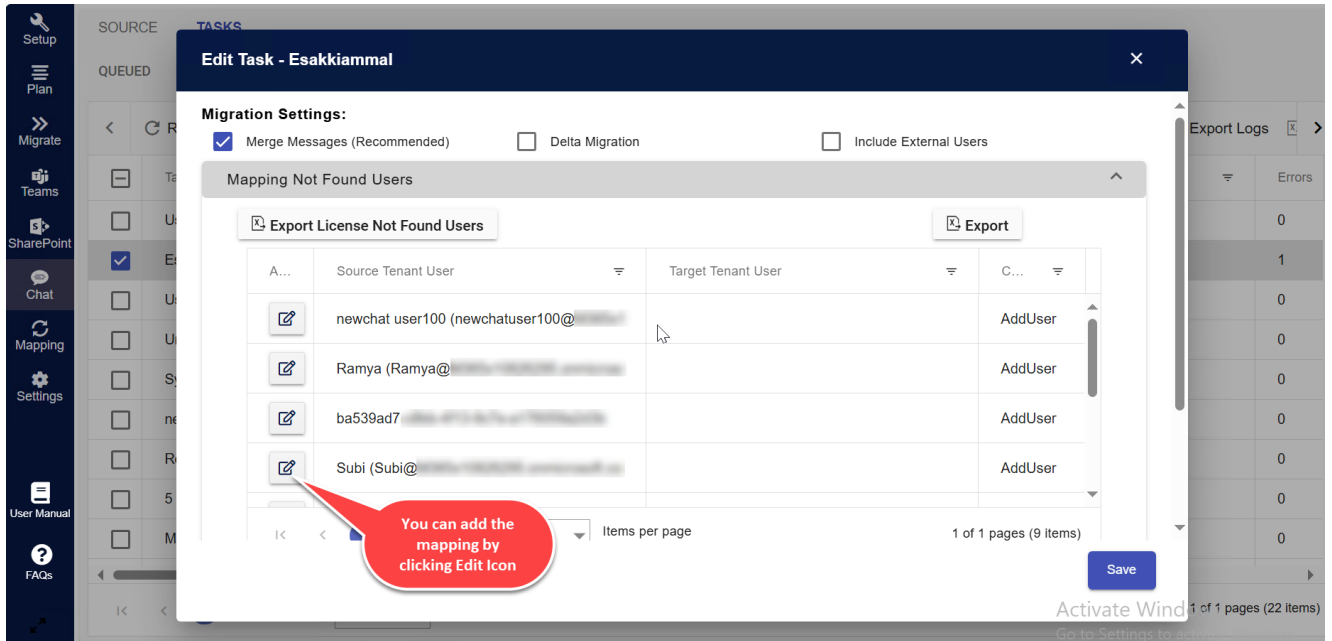
At the bottom, there are instructions: 'Steps to Set Secondary Admin access for Target Connector Account:' followed by a list of steps: 'Click the below Download button', 'Copy the Powershell commands from the downloaded file', and 'Run the copied Powershell commands in the Tenant Environment'. A 'Download' button is highlighted with a red callout number 6.

Review & Edit Missed User Mappings

You get to **edit the Migration settings** by clicking 'Edit'. Make changes as required and 'Save' the changes. The task then gets executed with the updated details.

You can **add the missed user mappings** for this specific task, one-by-one by clicking the **Edit icon** near the Source Tenant User OR

If you would like to upload the user mappings in a bulk manner, get them added in the 'Application User Mapping' and retry the task. You can export the missed mapping from here to feed in to the 'Application User Mapping' – please refer to section '[Application User Mapping](#)'.

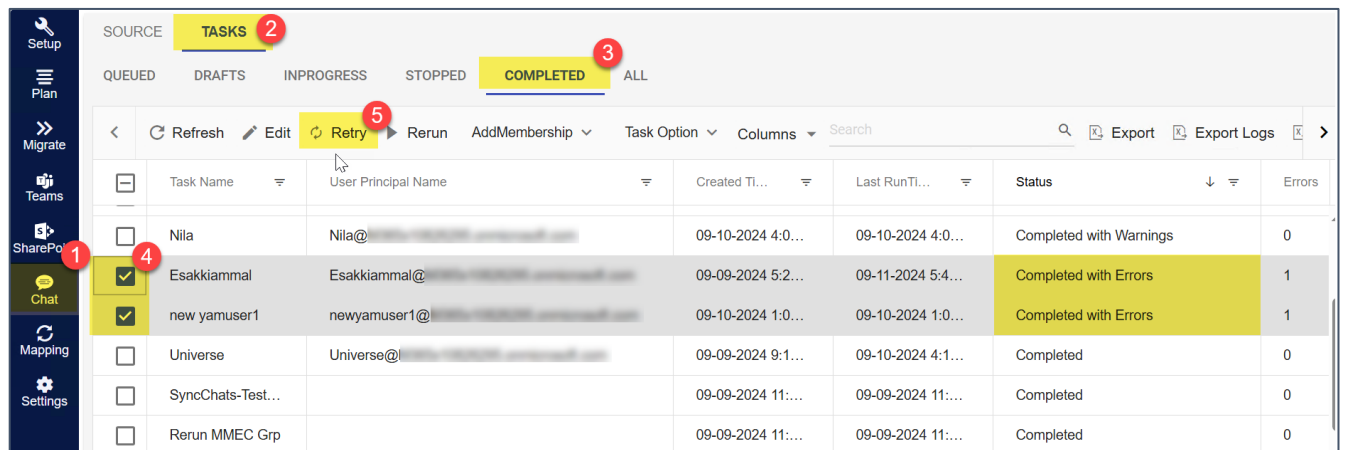


Automatically in a certain time interval, through [Scheduler Settings](#).



Step 7 : How to 'Retry' a task

- 1) Navigate to Chat -> Tasks -> Completed
- 2) Select tasks that **Completed with Errors / Warnings**
- 3) Click 'Retry'



Step 8 : How to trigger 'Incremental Migration'

- 1) Navigate to Chat -> Tasks -> Completed
- 2) Select the Users for whom you need Incremental Migration
- 5) Click 'Rerun', the Incremental Migration gets executed.

Note : If Status of the task is either *“Completed with Errors / Completed with Warnings”*, please review the errors / warnings with the Support team, before you proceed with the Incremental Migration.

Task Name	User Principal Name	Created TI...	Last RunTI...	Status	Errors
<input checked="" type="checkbox"/> Domain case us...	Domaincaseuser@M365x10826295.onmicrosoft....	09-10-2024 11:...	09-10-2024 11:...	Completed	0
<input checked="" type="checkbox"/> Adele Vance	AdeleV@M365x10826295.OnMicrosoft.com	09-11-2024 7:1...	09-11-2024 7:2...	Completed	0
<input checked="" type="checkbox"/> Grady Archie	GradyA@M365x10826295.OnMicrosoft.com	09-11-2024 7:1...	09-11-2024 7:2...	Completed	0
<input type="checkbox"/> Irvin Sayers	IrvinS@M365x10826295.OnMicrosoft.com	09-11-2024 7:1...	09-11-2024 7:2...	Completed	0
<input type="checkbox"/> Esakkiammal	Esakkiammal@M365x10826295.onmicrosoft.com	09-09-2024 5:2...	09-11-2024 5:4...	Completed with Errors	1
<input type="checkbox"/> new yamuser1	newyamuser1@M365x10826295.onmicrosoft.com	09-10-2024 1:0...	09-10-2024 1:0...	Completed with Errors	1
<input type="checkbox"/> User setting1	Usersetting1@M365x10826295.onmicrosoft.com	09-09-2024 6:3...	09-11-2024 5:5...	Completed with Warnings	0
<input type="checkbox"/> User setting 5	Usersetting5@M365x10826295.onmicrosoft.com	09-10-2024 11:...	09-11-2024 5:3...	Completed with Warnings	0
<input type="checkbox"/> new group100		09-09-2024 11:...	09-09-2024 11:...	Completed with Warnings	0

Step 9 : How to Add 'Membership Migration'

- 1) Navigate to Chat -> Tasks -> Completed
- 2) Select the Users for whom you need Membership Migration
- 3) Click 'Add Membership', the Membership Migration gets executed.

Task Name	User Principal Name	Created TI...	Last RunTI...	Status	Errors
<input checked="" type="checkbox"/> User setting1	Usersetting1@...	09-09-2024 6:3...	09-11-2024 5:5...	Completed with Warnings	0
<input checked="" type="checkbox"/> User setting 5	Usersetting5@...	09-10-2024 11:...	09-11-2024 5:3...	Completed with Warnings	0
<input checked="" type="checkbox"/> Nila	Nila@...	09-10-2024 4:0...	09-10-2024 4:0...	Completed with Warnings	0
<input type="checkbox"/> Esakkiammal	Esakkiammal@...	09-09-2024 5:2...	09-11-2024 5:4...	Completed with Errors	1
<input type="checkbox"/> new yamuser1	newyamuser1@...	09-10-2024 1:0...	09-10-2024 1:0...	Completed with Errors	1
<input type="checkbox"/> User setting 2	Usersetting2@...	09-10-2024 10:...	09-11-2024 8:0...	Completed	0
<input type="checkbox"/> Universe	Universe@...	09-09-2024 9:1...	09-10-2024 4:1...	Completed	0
<input type="checkbox"/> SyncChats-Test...		09-09-2024 11:...	09-09-2024 11:...	Completed	0
<input type="checkbox"/> Rerun MMEC Grp		09-09-2024 11:...	09-09-2024 11:...	Completed	0

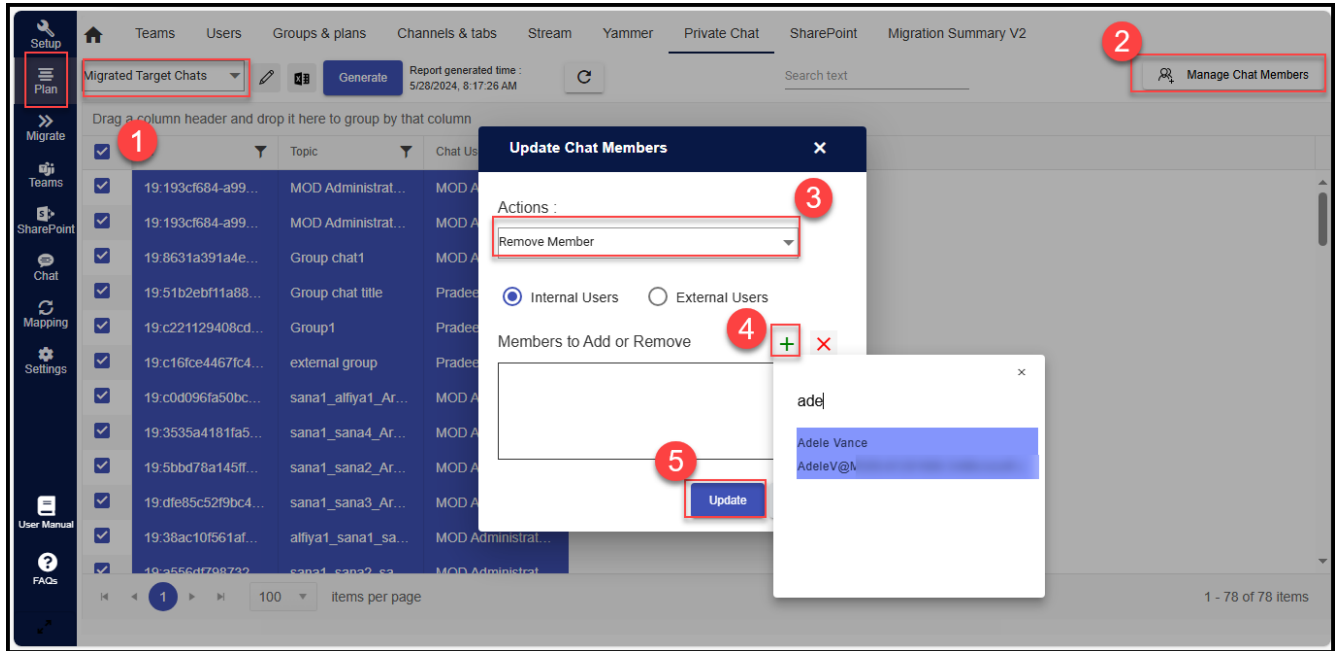
Step 10 : How to Remove 'Target Connector Account' from the migrated chats

Post migration, review the migration results and once satisfied, remove the Connector Account from the migrated chats. To do this, follow the below steps.

Generate the report as shown in below screenshot

App	Completed migration	Available quota
Teams	12	88
Plans	4	96
Sites	5	95

Now the app lists all the chats migrated to the target account. Select all and click on Manage Chat Members → Choose 'Remove Members' under **Actions** → click + icon → Search for the Target Connector Account & select it → Update.

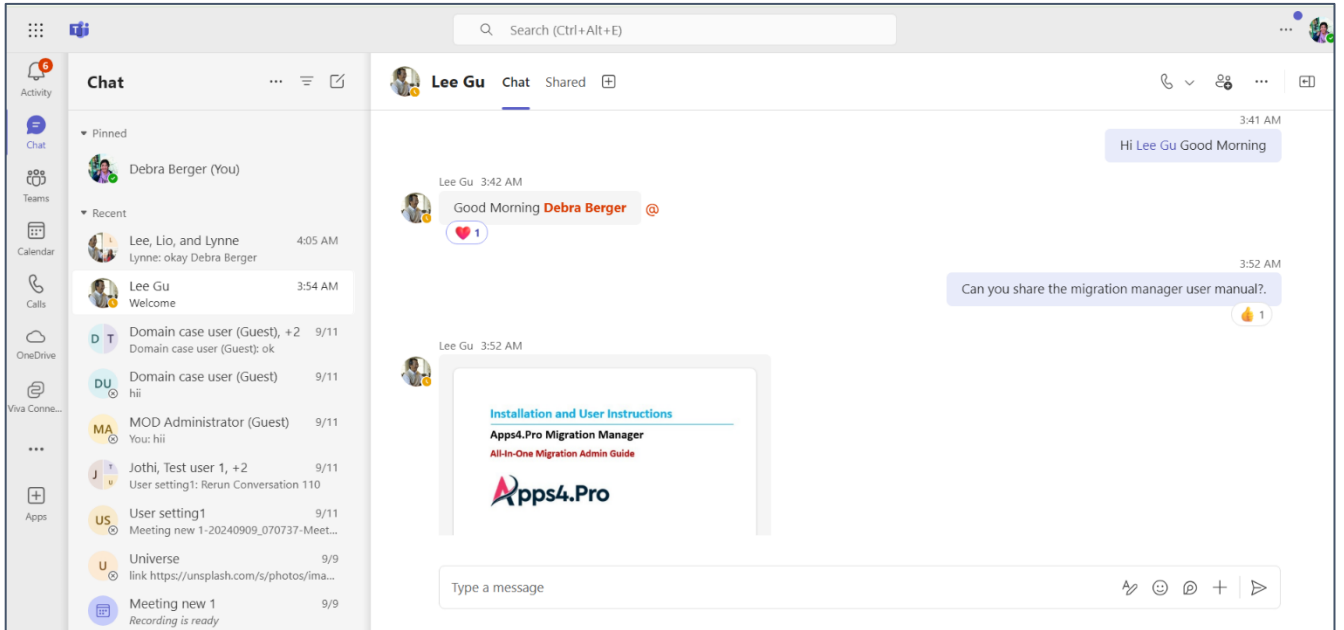


User Experience

When 'Messages Count for Merge' is set as '1'

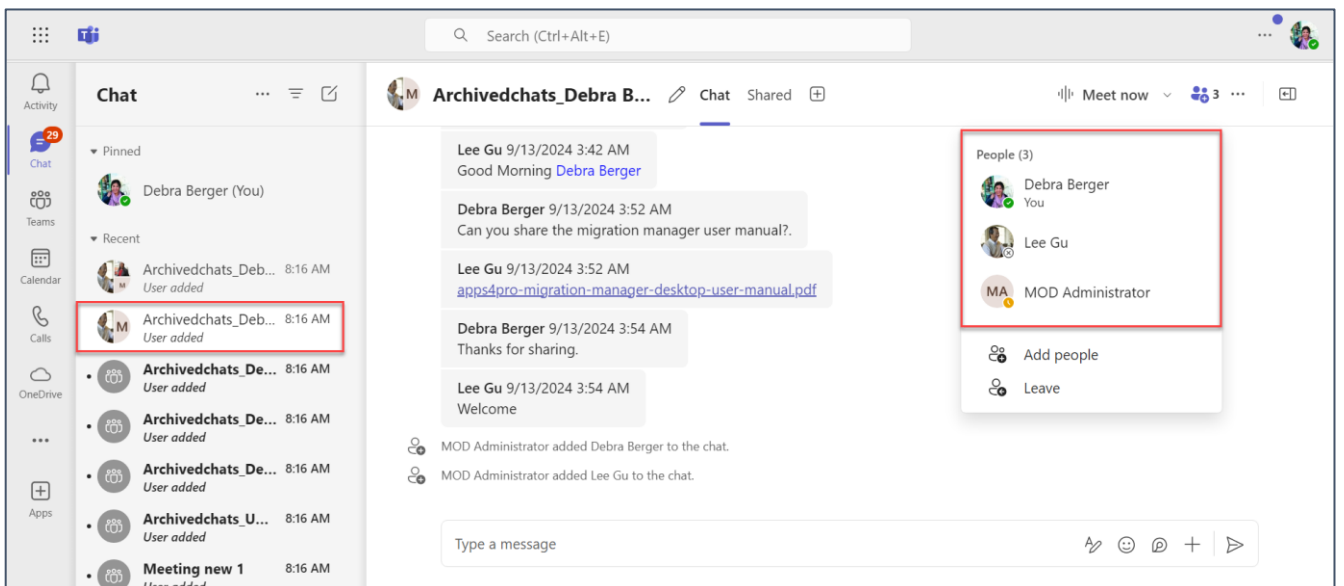
1:1 Chat

Source



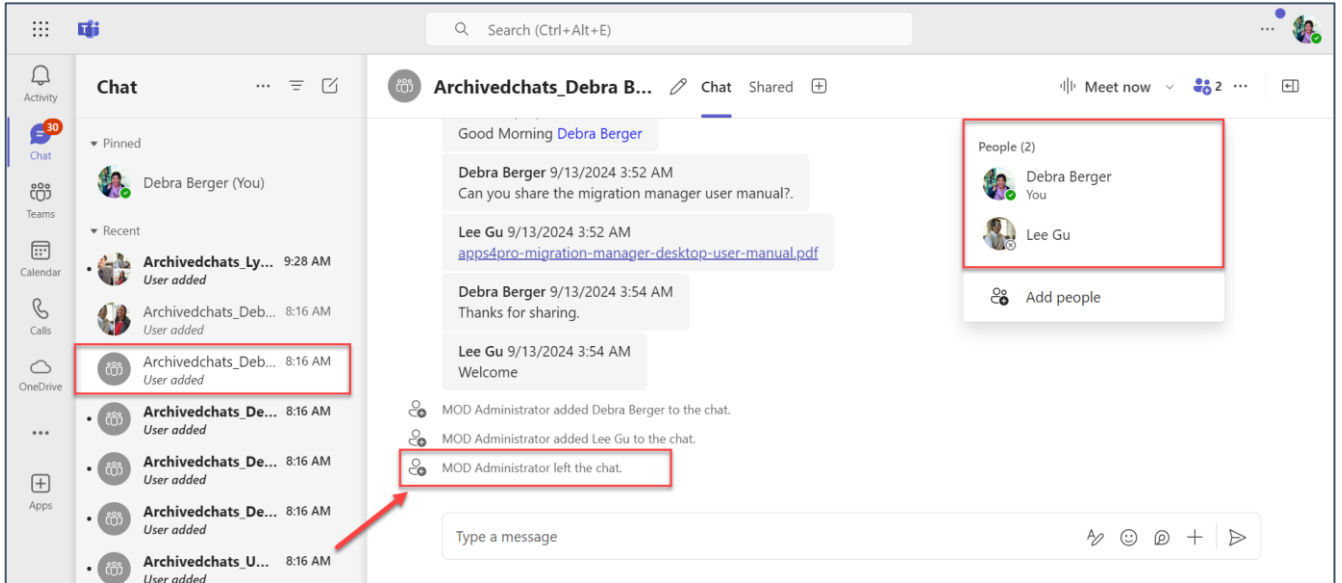
Target

Private chats (1:1 and 1:N) get migrated as **Archived chats** in the target tenant with the Service Account being added as member of all the chats.



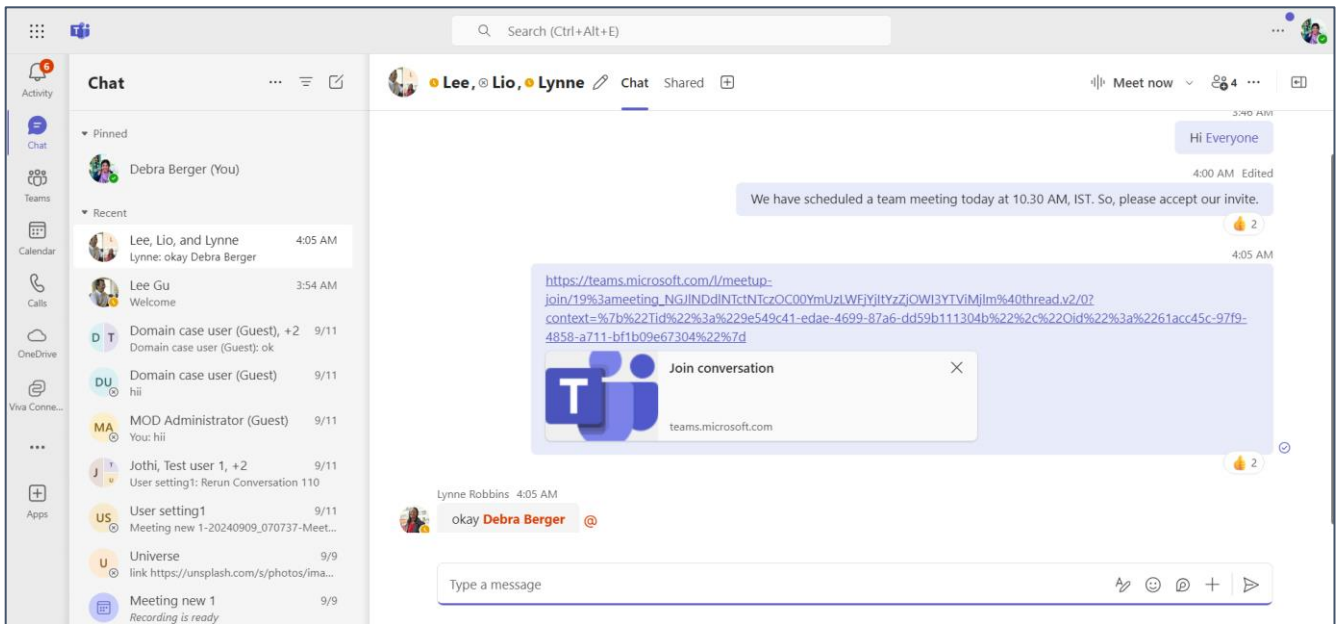
After removing the connector account in the target tenant, the archived chat resembles as in below screenshot.

Note : After Migration, we can remove the Service Account from all the chats via the tool as shown in [Step 10 : How to Remove 'Target Connector Account' from the migrated chats](#)

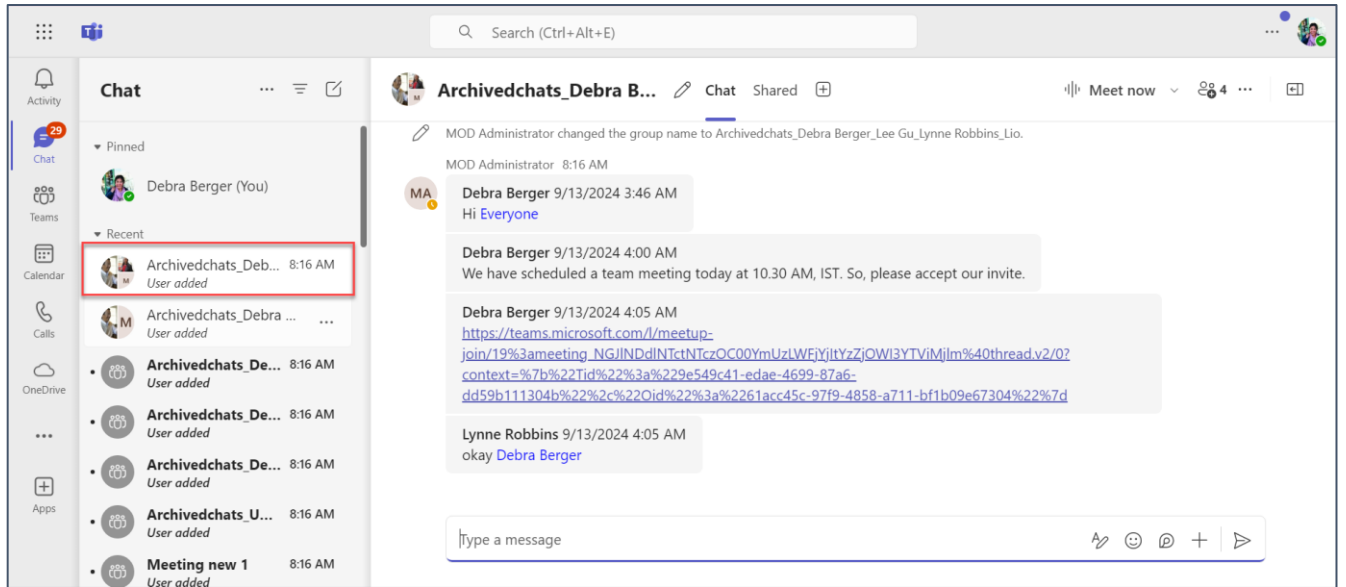


Group Chat

Source



Target

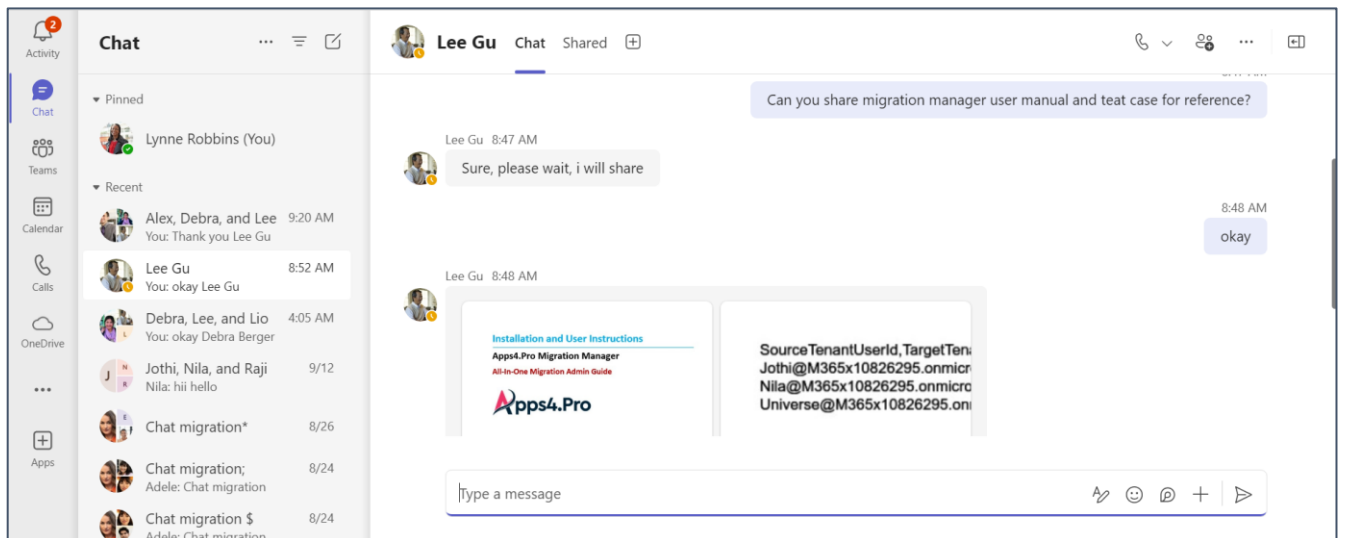


When 'Messages Count for Merge' is set more than '1'

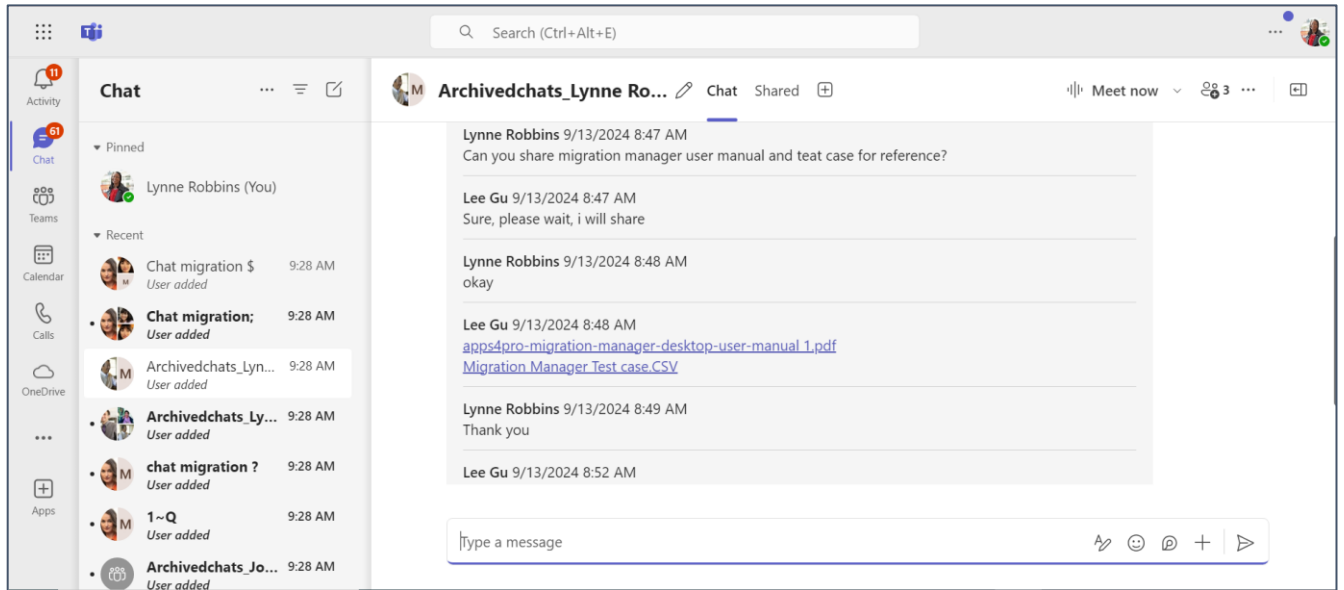
Consider 'Messages Count for Merge' is set as '10'

1:1 Chat

Source

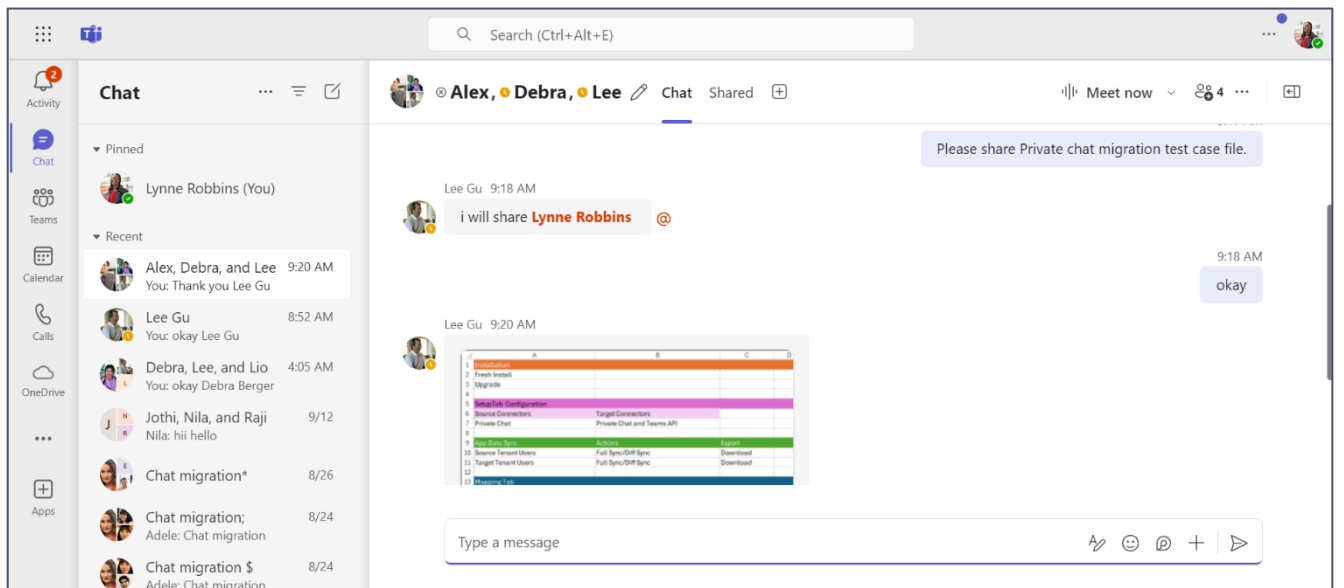


Target

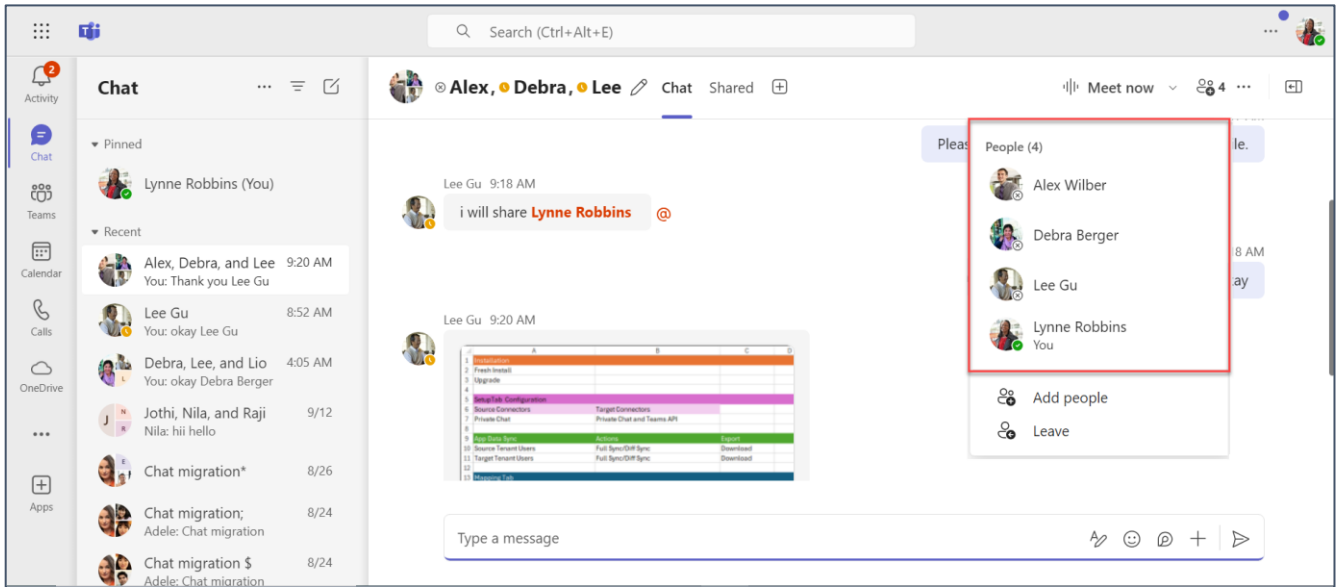


Group Chat

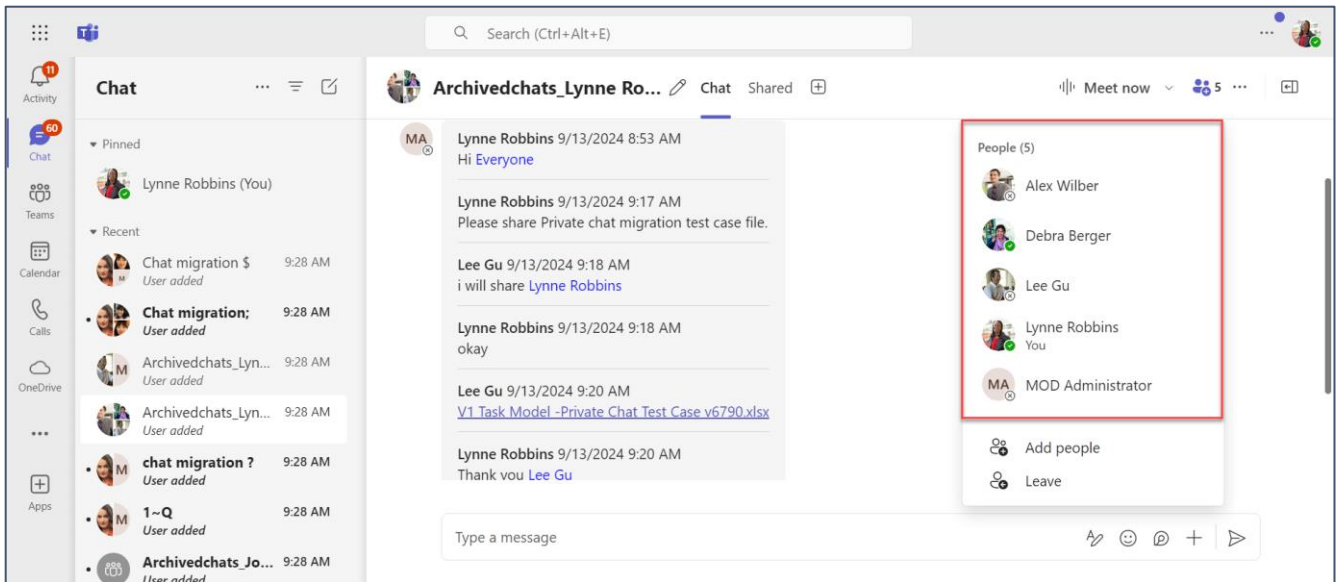
Source



With Participants



Target



4. Planner Migration

Step 1 : Setup & Configuration

Setup : License and Roles

1. **Microsoft 365/Office 365(E3 or E5) License** is required for Source & Target Connector Accounts.
2. **Microsoft Planner License** is required for both Source & Target Connector Accounts.
3. **Exchange Online License** is required for Target Connector Account.
4. **User Administrator** is required for both Source & Target Connector Accounts.
5. Source Connector Account should be a Member or Owner of the Plans that you chose to migrate (Please refer section :- *How to Add 'Source Connector Account' as a member of the Plans*). **Configuration :** Connector Accounts – Sign-in

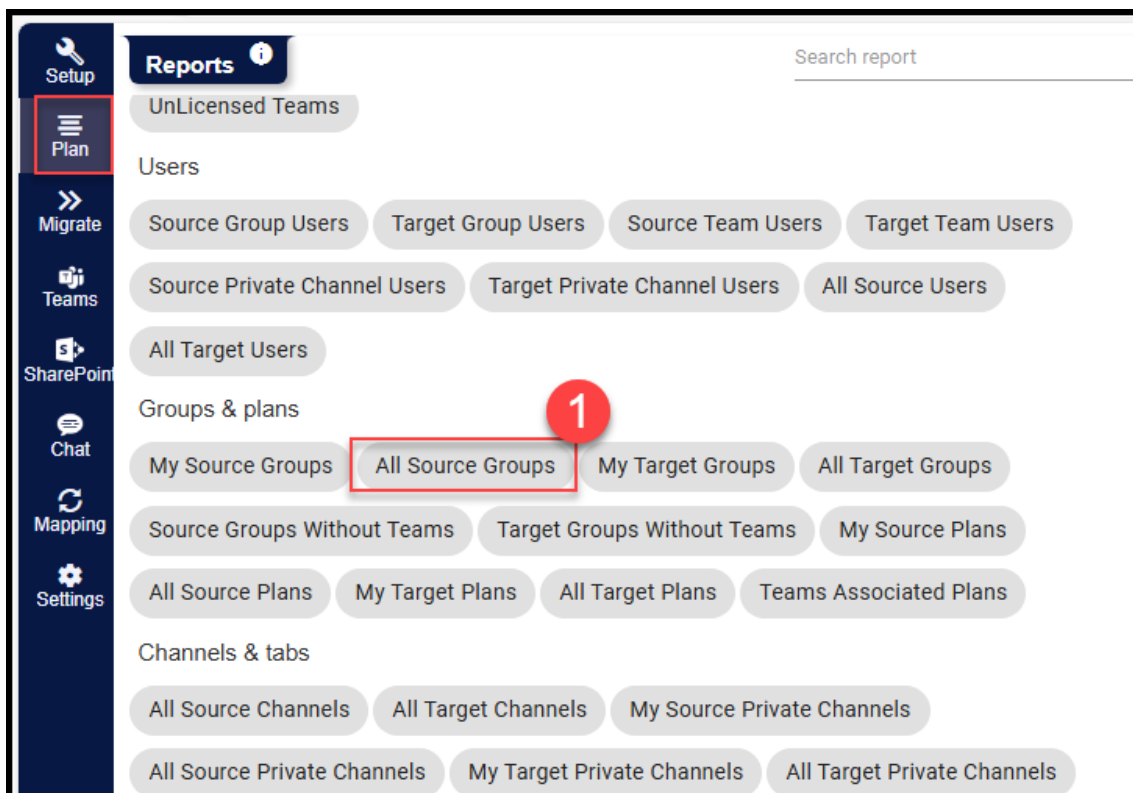
Perform the Source & Target Connector Accounts Sign-in as shown in *Global Configuration section*.

Mapping : Application User Mapping

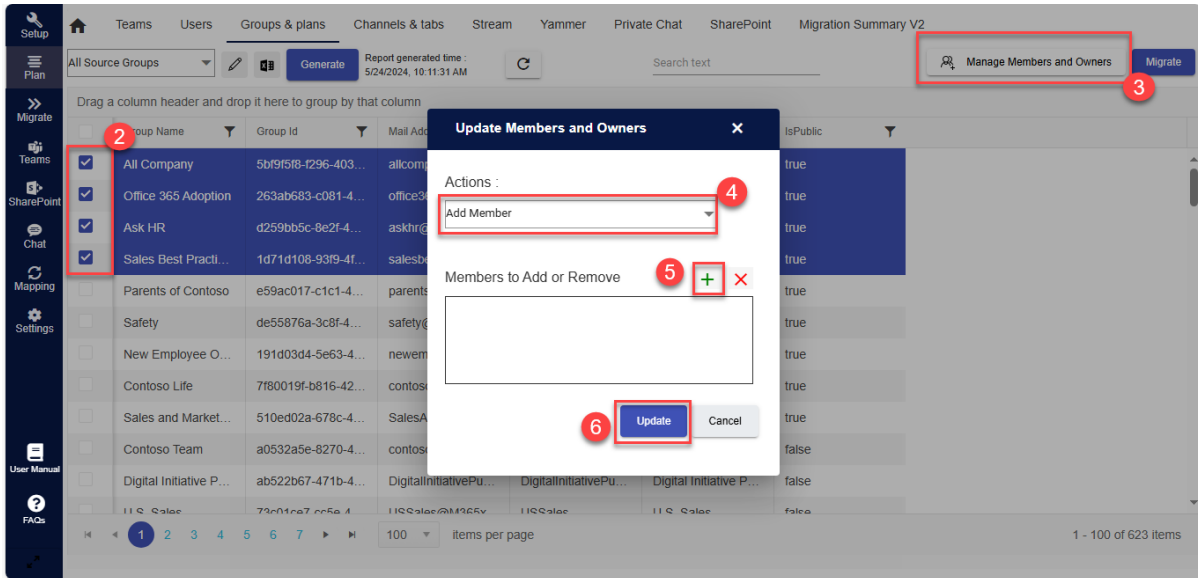
Perform the Application-level User Mapping as shown in *Application User Mapping section*.

Step 2 : How to Add 'Source Connector Account' as a member of the Plans

Go to **Plan Tab** -> Generate the "All Source Groups" report.



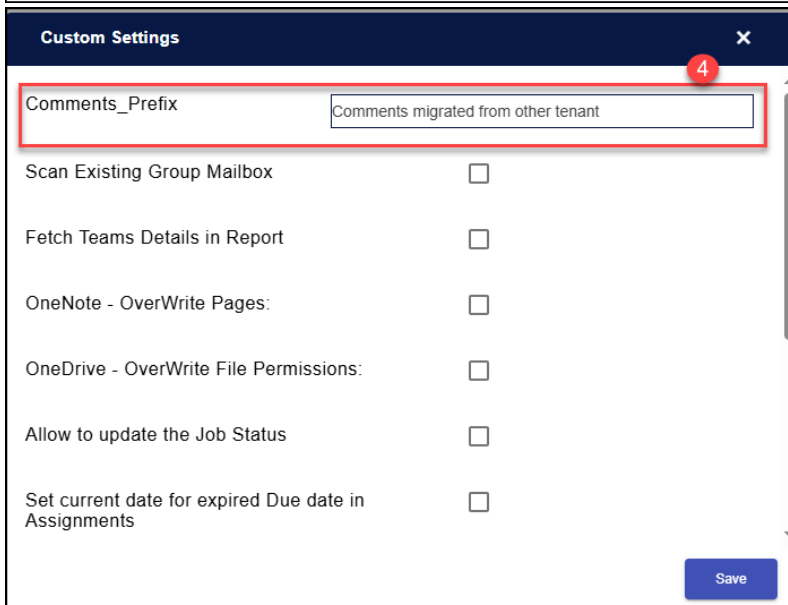
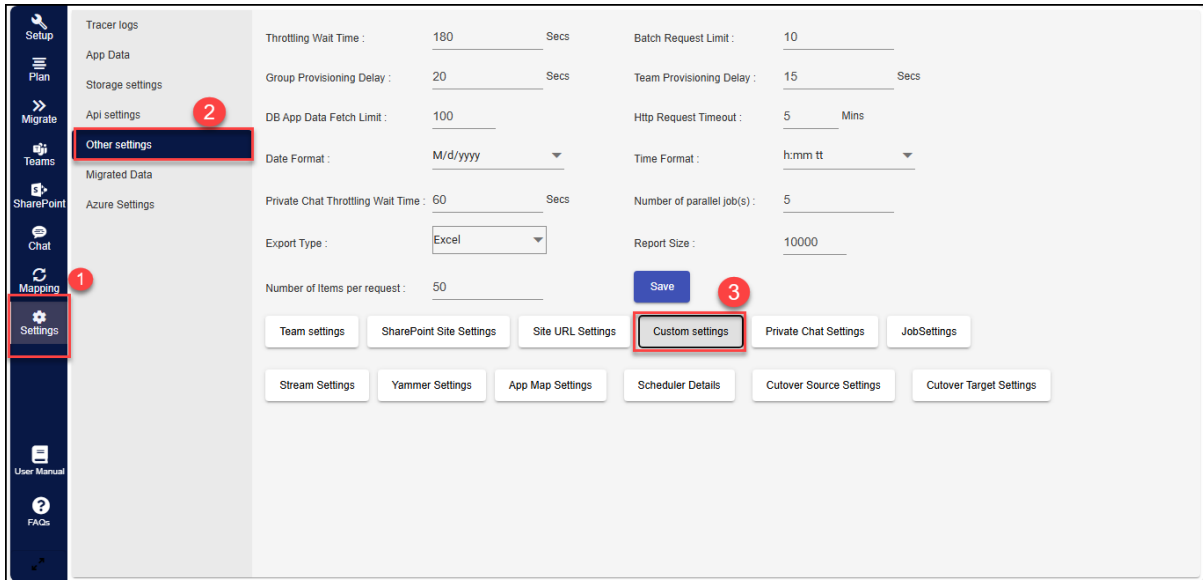
Then select the groups associated with the plans to be migrated where you need to add as member and click on **Manage Members and Owners** option and add the Source Connector Account under Member and update.



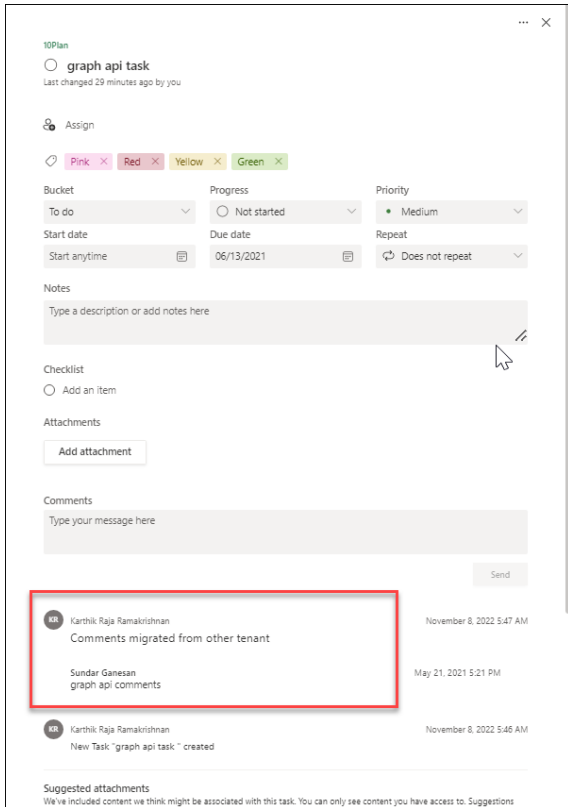
Step 3 : Additional settings

Comments prefix [OPTIONAL]

The app will migrate the task comments appended with the comments prefix. To change this prefix, follow the steps as mentioned in the below screenshot. The text given in the below box will be appended along with the migrated comments.



The prefix will be appended before each comment as below in the target tenant



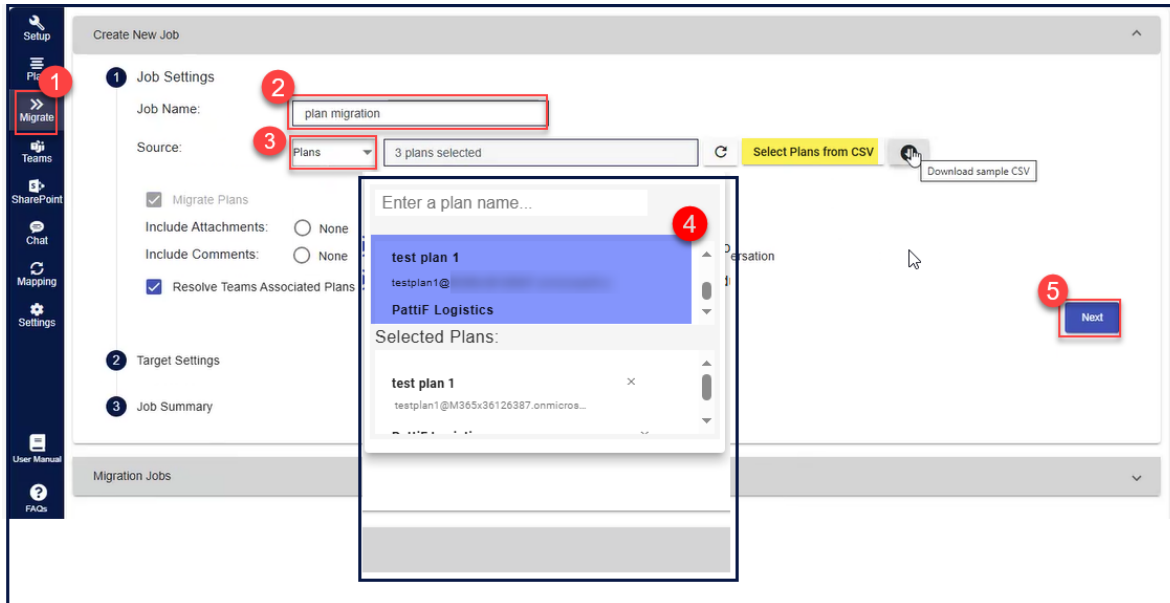
Step 4 : Create Migration Job

First provide the name of the current job. Then, select the required source tenant plan(s) to migrate. Choose the format of planner task attachments and comments.

Download Sample CSV : When you have to upload a bunch of Plans through the highlighted option – “**Select Plans from CSV**”, you can always use the Download option to download a sample format.

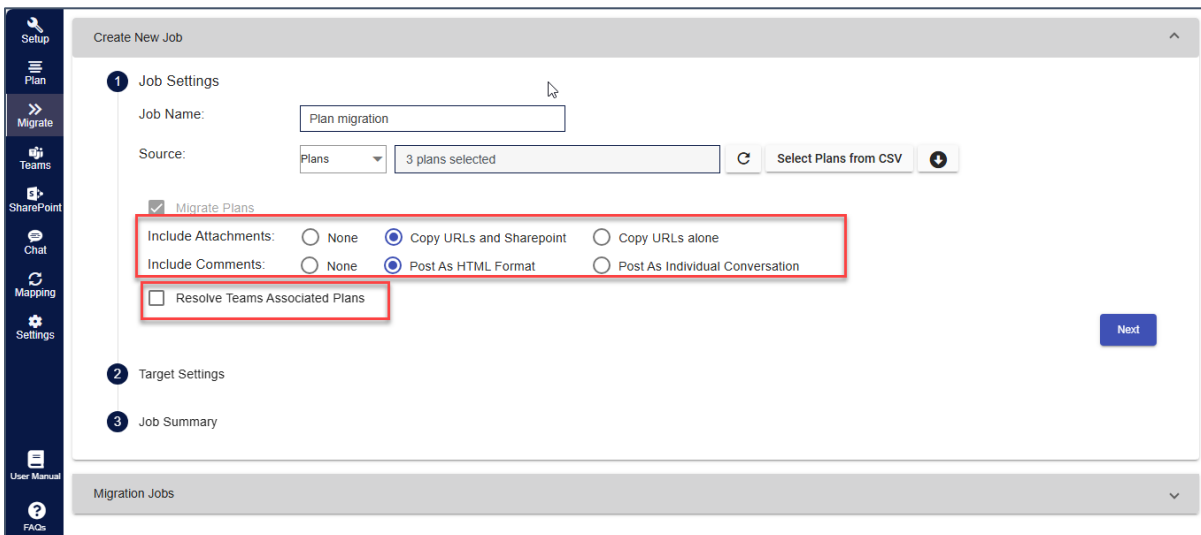
Sample CSV :

PlanName	PlanId
Communications	EjpG47In-kOcB6FoM9qoWskAHkKb
Plan	kTapqQ-ISEC-WIYtuNJEGMkAEHZ8
Tasks	1_UBDsLAHkG5_V7rUnGjsMkAE02L
Golf Assist	BaSDnu5N8kO416YRtyhwnskAFe2b



You can choose how the attachments and comments has to be migrated to the target from the below options.
Resolve Teams Associated Plans – This option is completely **OPTIONAL** and the user has to select / deselect based on the scenario.

- **Select** this option only when some of the plans you are migrating are part of Teams.
- **Deselect** this option when you are sure that none of the “plans to be migrated” are part of Teams. In this case, Team related details are not retrieved, which in turn **improves the performance of the Migration**.



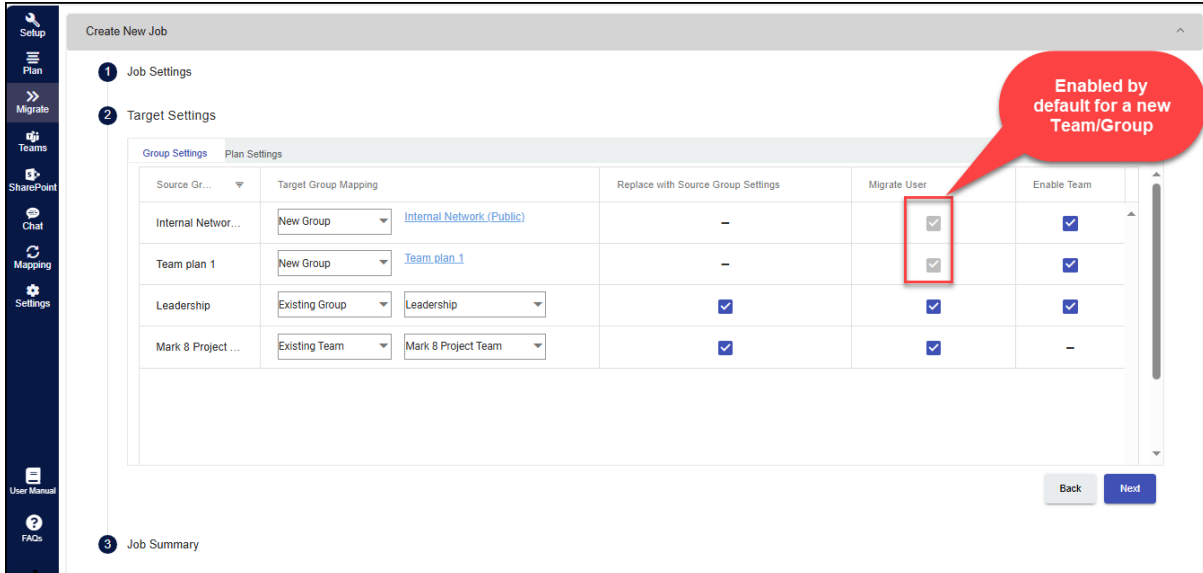
Step 5 : Target Settings

In this step, provide the target group(s) to migrate plans. The following options are available to select target groups.

- Migrate into the new group/team.

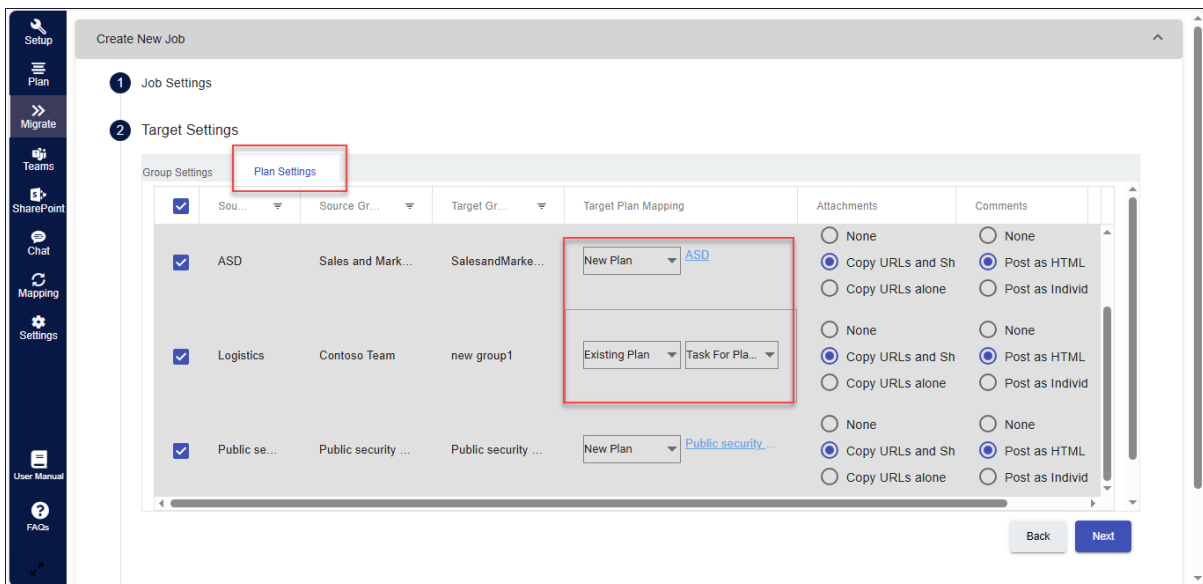
- Migrate data to the existing group/team. Here, you can choose to 'Replace with source Group Settings'. Upon choosing 'New Group' or 'Existing Group' option, you can enable the team for that group.

Migrate User : When migrating to an existing team / group, one can choose to migrate the additional members by enabling this option.



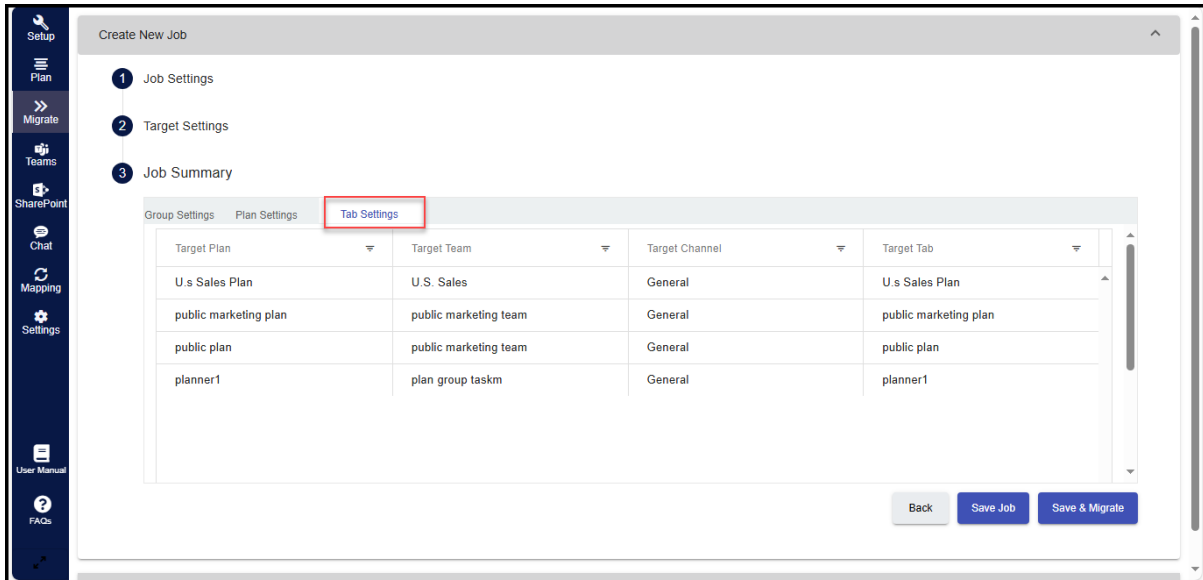
Plan Settings

Under this settings tab, select the required plans to migrate into New or Existing Plan and select the format of the planner task attachments and comments, as well as you can select the option 'Add as tab in Teams'.



Tab settings

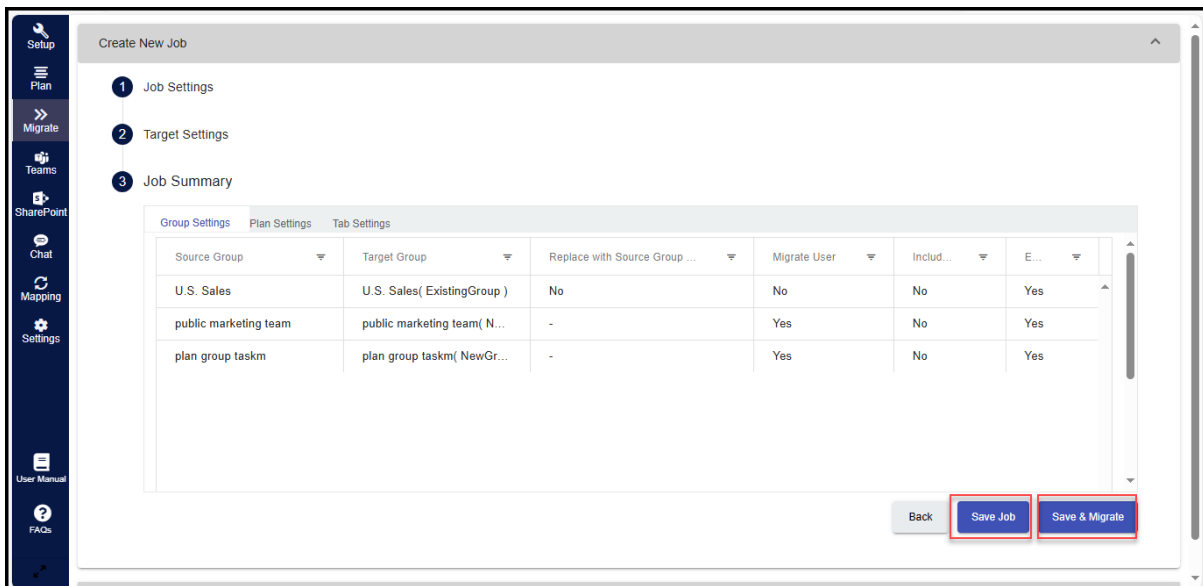
Here you can choose the target channel to add the migrating plan as a tab.



Step 6 : Job Summary

In this step, you can view the summary of job. After checking the summary, you can select one of the following two options.

- Save Job -> It saves the current job, then you can run later by clicking Start button from Migration Jobs grid.
- Save & Migrate Job -> It saves the current job and starts the migration process immediately.



Execute Saved Jobs

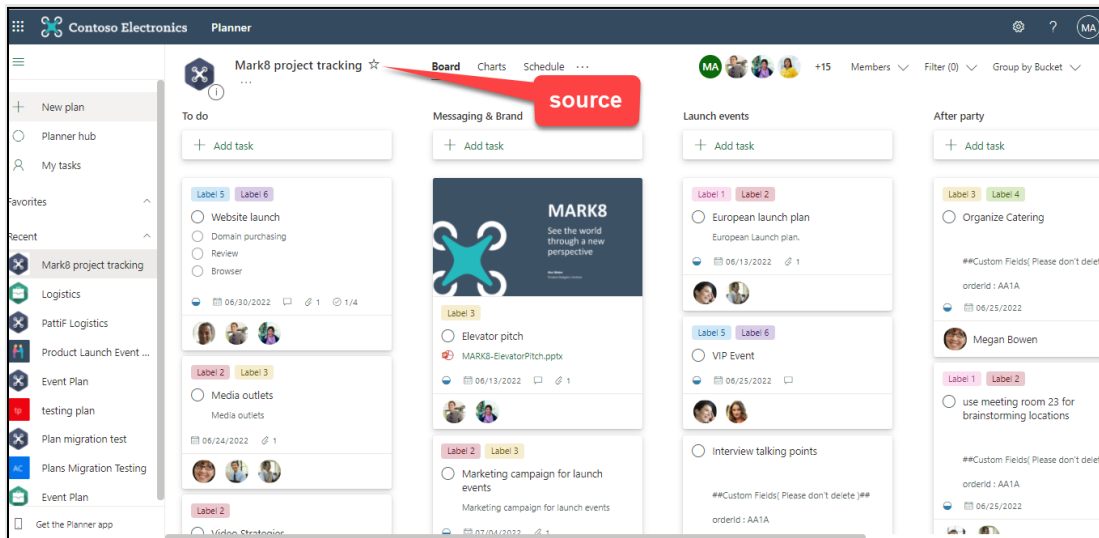
Under Migration Jobs tab – the list of Jobs and their summary are listed. You can opt to run the previously saved jobs as below.

The screenshot displays the 'Migration Jobs' section of the Apps4.Pro interface. At the top, there is a navigation bar with a 'Migration Jobs' tab highlighted. Below this, a summary bar shows 'Total No Of Jobs: 5' and 'Completed Jobs: 4 Notstarted Jobs: 1'. An 'Upload Job' button is visible on the left. The main area contains a table with the following columns: Job Name, Job Cre..., Job Last..., It..., Job Type, Job Status, Summary, and Action. The first row shows a job named 'Plans Migration' with a status of 'NotStarted'. The 'Action' column for this job contains a 'Start' button, which is highlighted with a red box. Below the table, there is a pagination control showing '1' of 1 pages (5 items) and a dropdown for 'Items per page' set to 100.

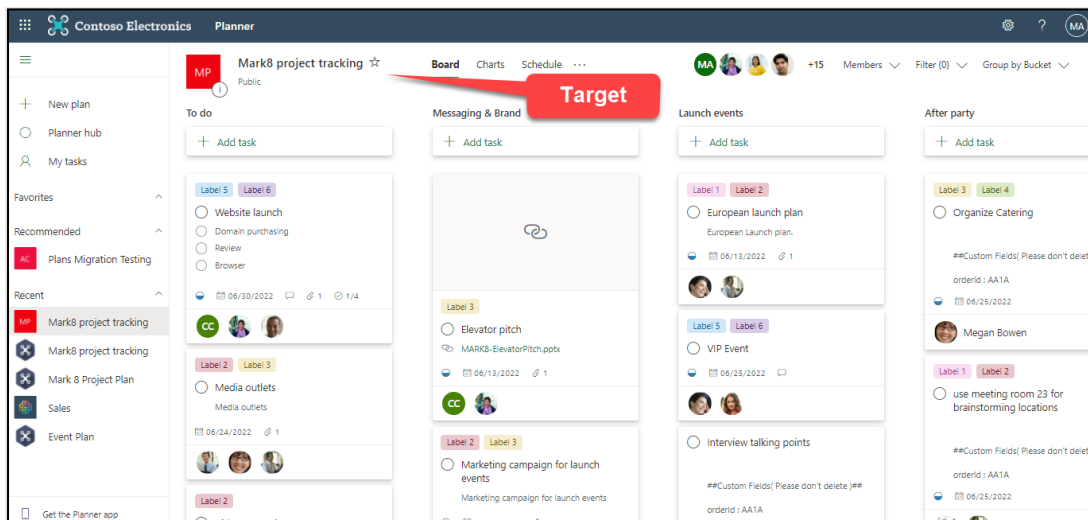
	Job Name	Job Cre...	Job Last...	It...	Job Type	Job Status	Summary	Action
	Plans Migration	2024-06-03T...	2024-06-03T...	1	Plans	NotStarted	View Summary	

User Experience

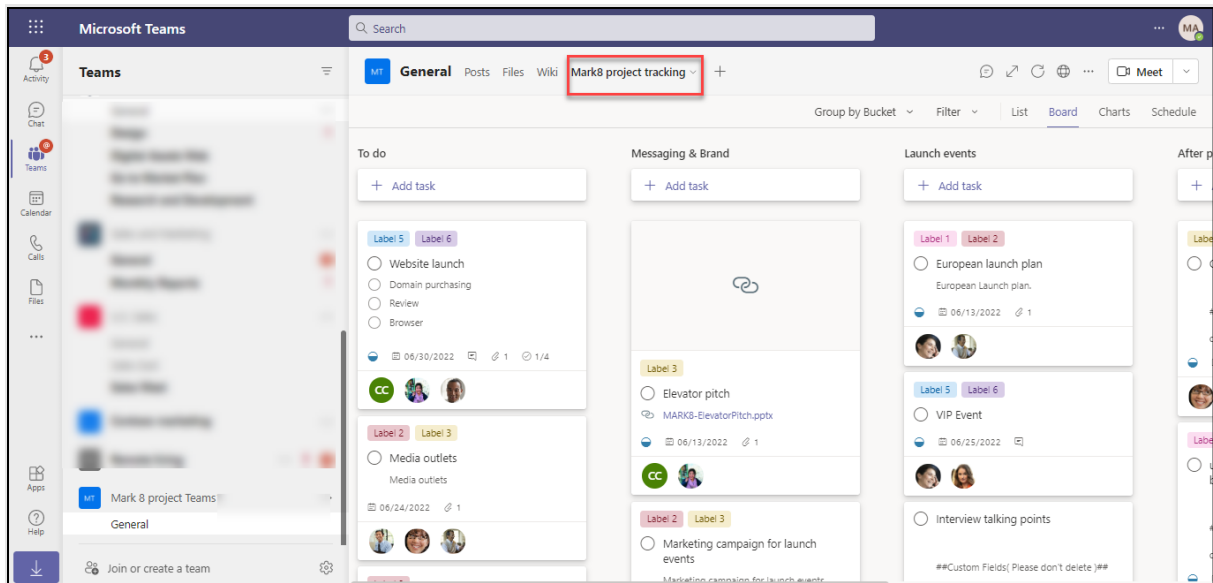
Source:



Target:

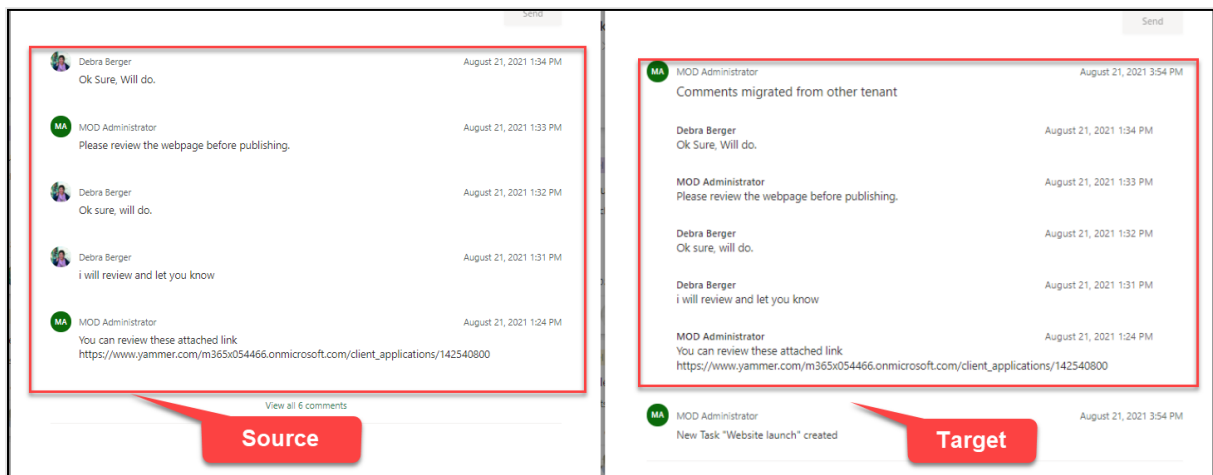


Teams Tab:

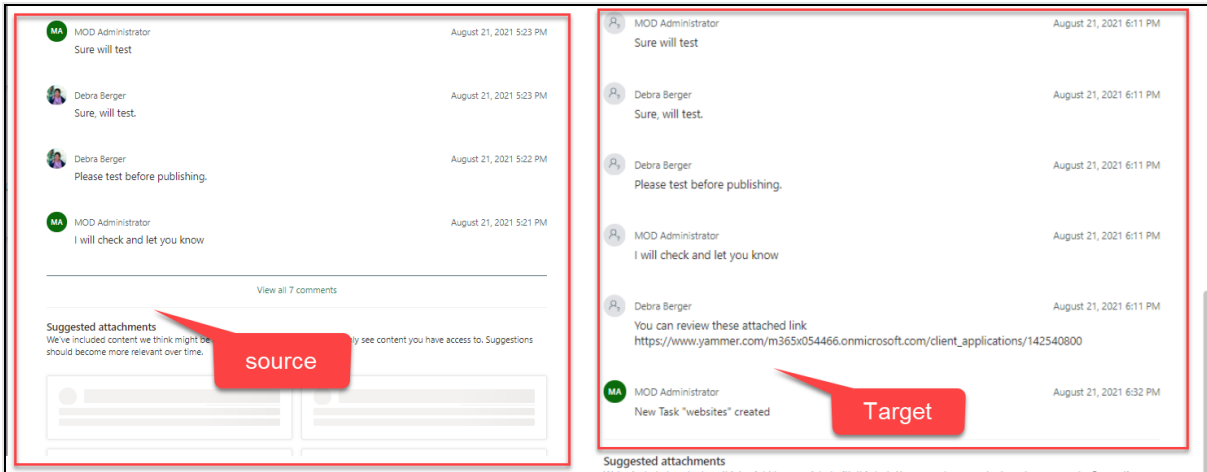


Comments:

Post as HTML Format:

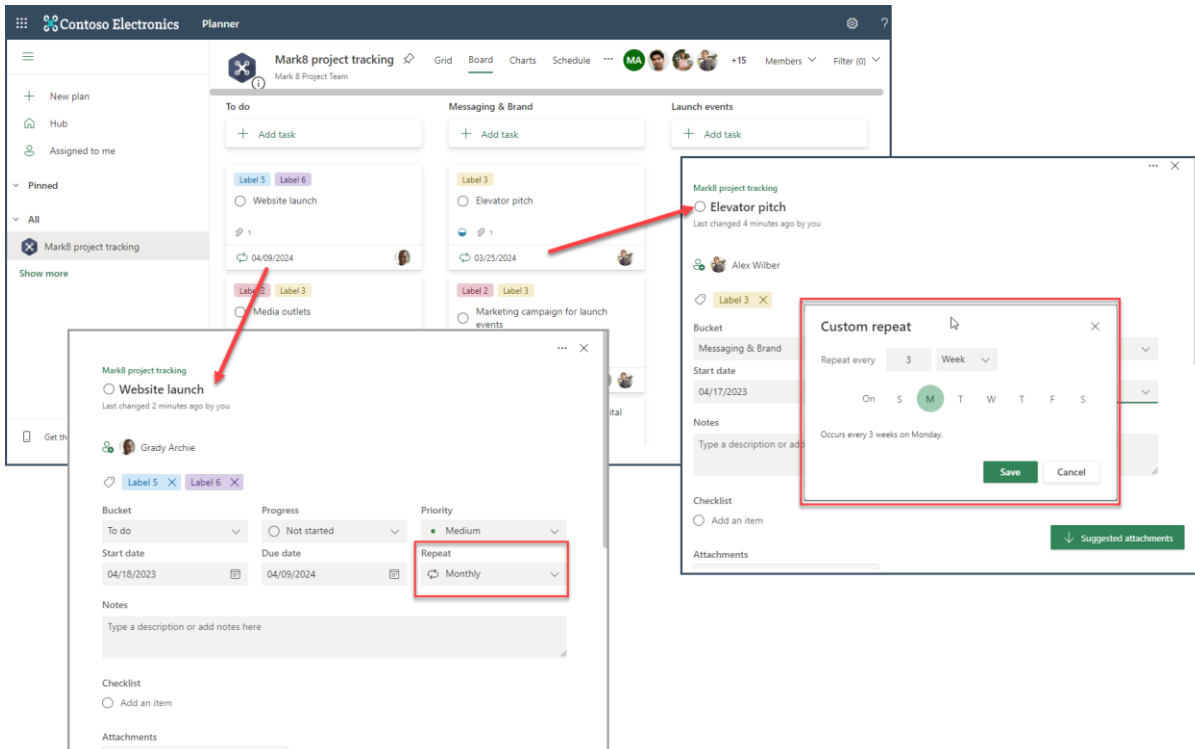


Post as Individual Conversation:

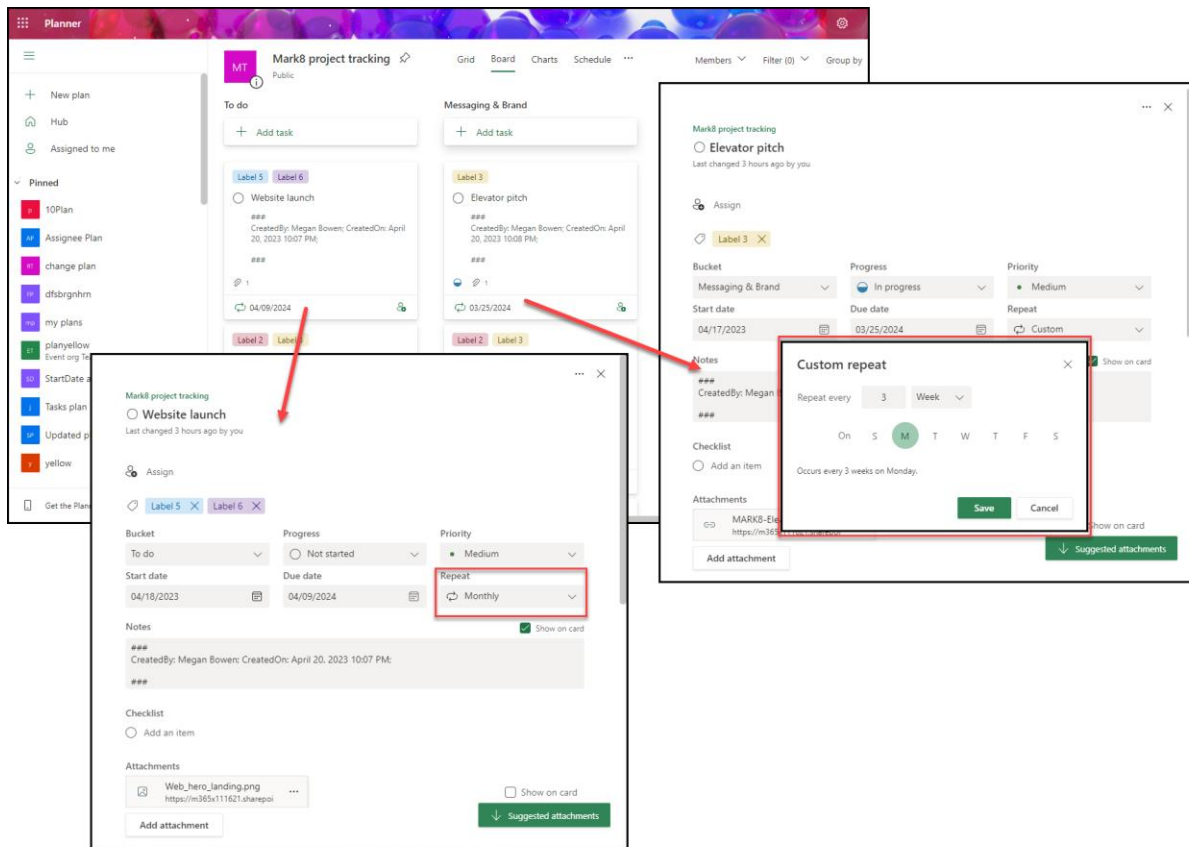


Repeat property

Source



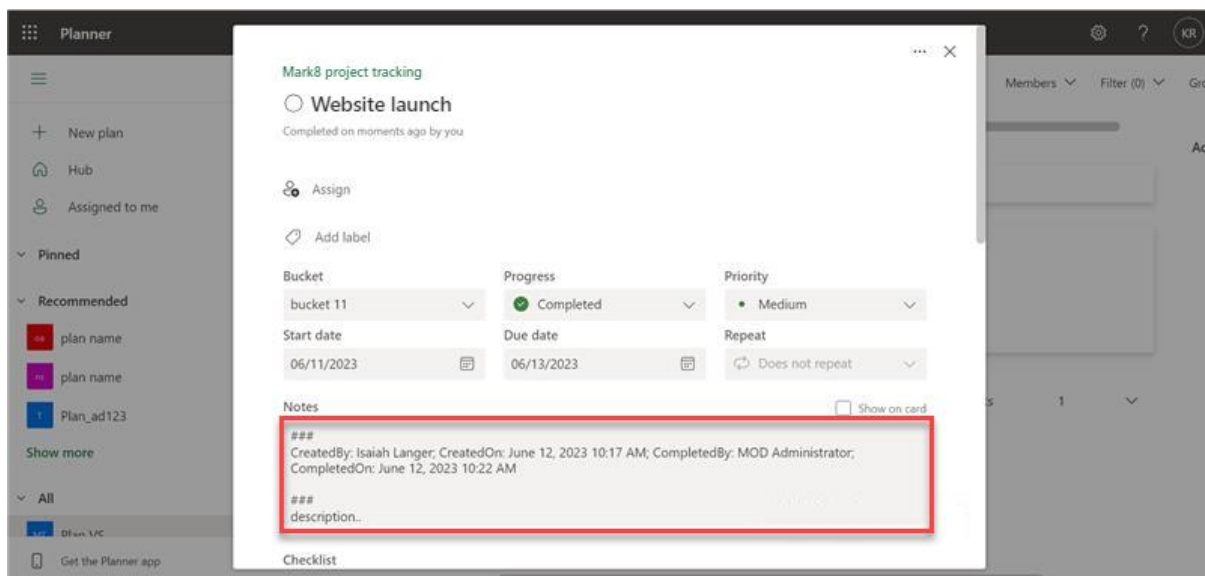
Target



Metadata

The below Metadata information gets migrated to Target and displayed in the Description as below.

- Created By
- Created Date
- Completed By
- Completed Date



Impact

Any edit done in an existing task will not be migrated in the incremental migration (i.e., when you re-run a previously completed JOB).

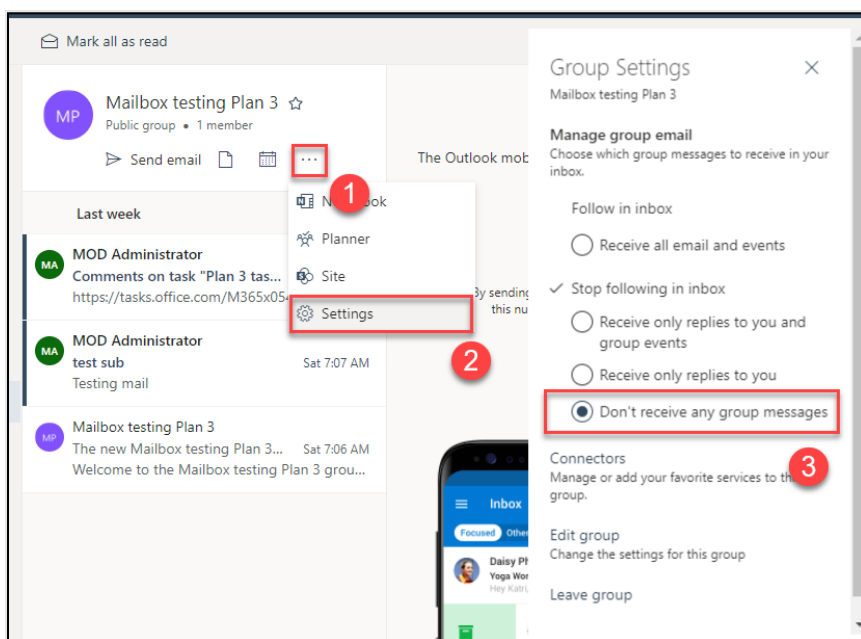
Email Notification

End user will get a notification when migrating the below stated items.

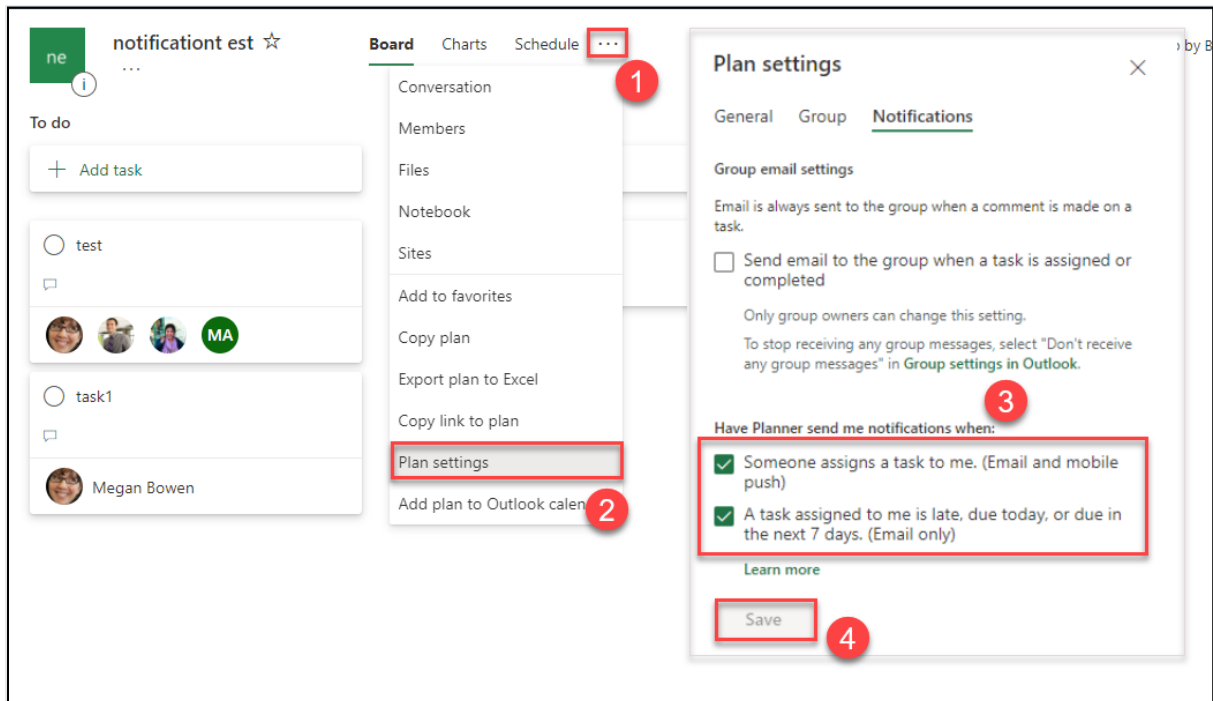
- Comments
- Task Assignments

To avoid the notification problem when trying migration with **Existing group/plan**, each end user needs to enable the below settings.

Open the Respective Plans Office 365 group which we are going to migrate in the outlook, then click on settings→Select **Don't receive any group messages**.



Then Go to the Existing plan in the target tenant→ Click on more option (...)→Plan Settings→Unselect both settings under “Have Planner send me notifications when”.



Note: We can't avoid these notifications, when trying the plans migration with **new group/plan** through Apps4.Pro tool.

5. Viva Engage (Yammer) Migration

Migration Approach

The tool supports Viva Engage (Yammer) Migration through the following approaches

- Non-Native mode to Native mode.
- Hybrid mode to Native mode.
- Port Viva Engage (Yammer) Networks from US to EU Geo

Non-Native Mode to Native Mode

When you migrate a group from Non-Native Mode to Native Mode, the files from the source Viva Engage (Yammer) internal group are migrated to the SharePoint-Online Site Document Library corresponding to the Target Viva Engage (Yammer) Office365 Group.

Hybrid mode to Native mode

When you migrate an External group from Hybrid Mode to Native Mode, the files from the source External group are migrated to the SharePoint-Online Site Document Library corresponding to the Target Viva Engage(Yammer) Office365 Group.

Port Viva Engage(Yammer) Networks from US to EU Geo

When you migrate the Viva Engage (Yammer) Networks from US to EU Data Centre, the Viva Engage(Yammer) data including Networks, Communities, Messages, Files, Topics, Likes, Best Reply etc.] gets ported to the EU Data Centre.

Step 1 : Setup & Configuration

Setup : License and Roles

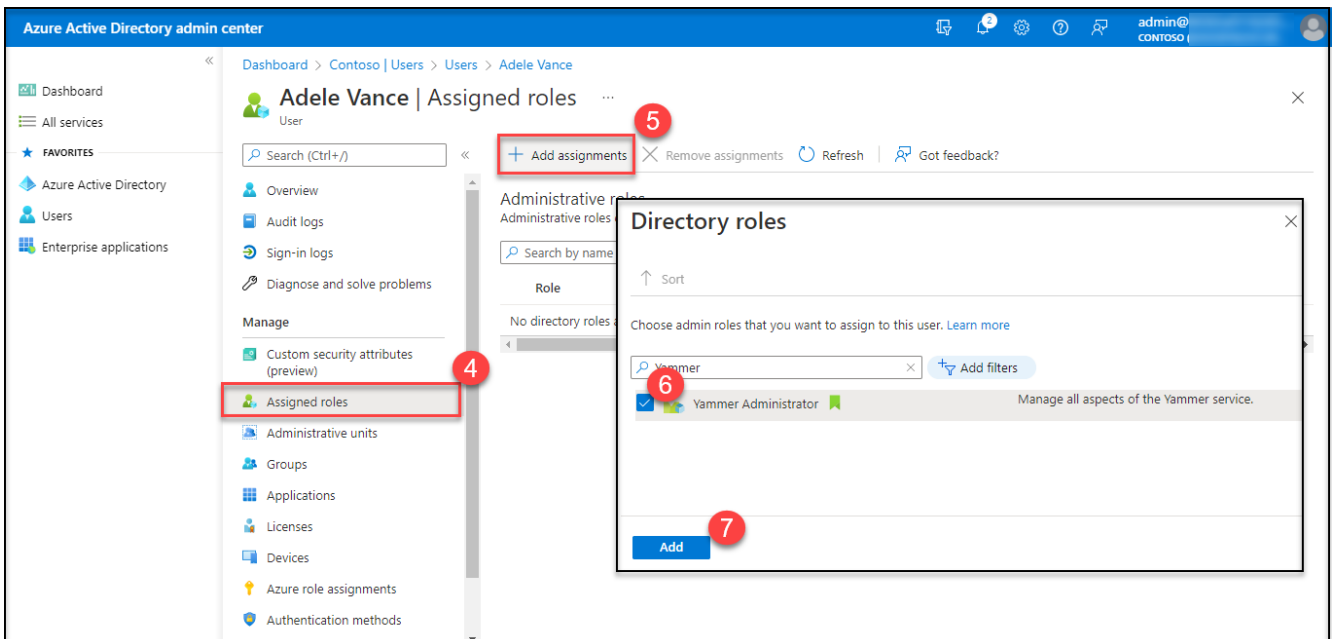
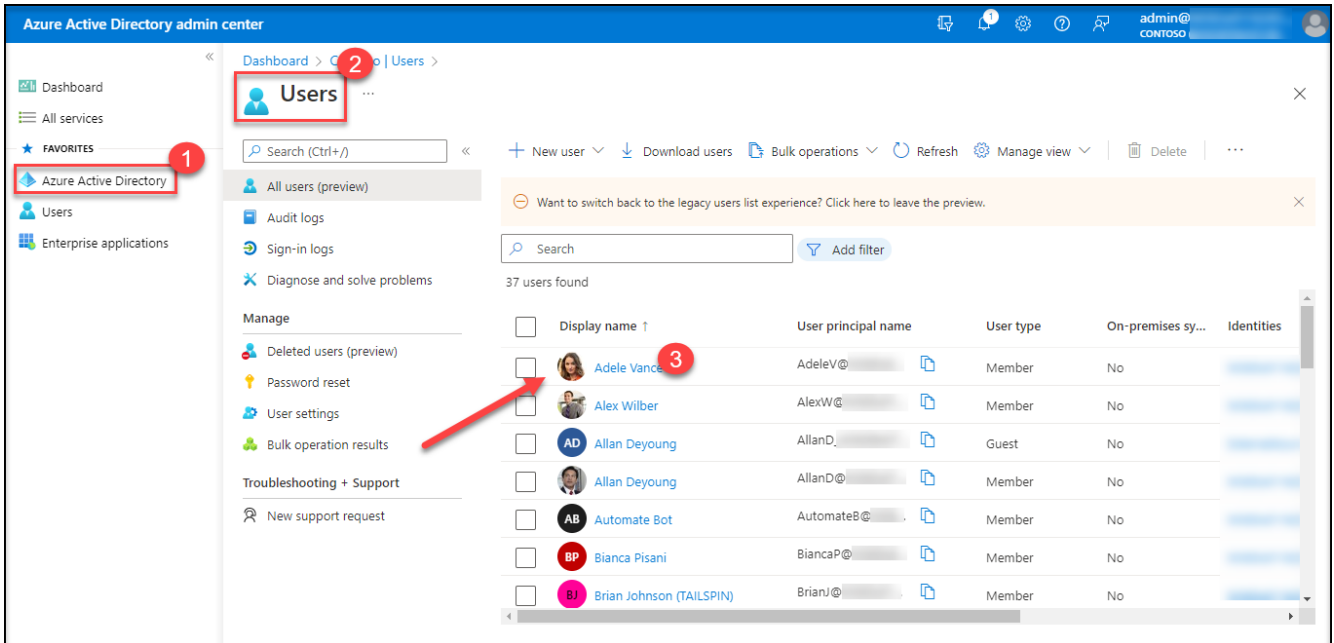
1. **Microsoft 365/Office 365(E3 or E5) License** is required for Source & Target Connector Accounts.
2. **Yammer Enterprise license** is required for both Source and Target Connector Accounts.
3. **Yammer Administrator + User Administrator** role is required for both Source & Target Connector accounts. (Refer sections : "[Setup : Yammer Administrator in Azure Portal](#)" & "[Setup 'User Administrator' Role](#)")
4. Source Connector Account should be a Member of the "Viva Engage(Yammer) Private Groups" that you chose to migrate.

Setup : Yammer Administrator in Azure Portal

Follow the steps to add the Service account as a **Yammer Administrator**.

Please login to the Azure Portal(<https://aad.portal.azure.com>) as a Global admin.

1. Navigate to Azure Active Directory -> Users
2. Click on the Service Account
3. Navigate to “Assigned Roles”
4. Click “+ Add assignments”
5. Select “Yammer Administrator”
6. Click Add



Configuration : Connector Accounts – Sign-in

Perform the Source & Target Connector Accounts Sign-in as shown in *Global Configuration section*.

Additional Configuration : Additional Connector Accounts – Sign-in

Perform the additional Source & Target Accounts Sign-in as shown in *Additional Configuration section*.

Mapping : Application User Mapping

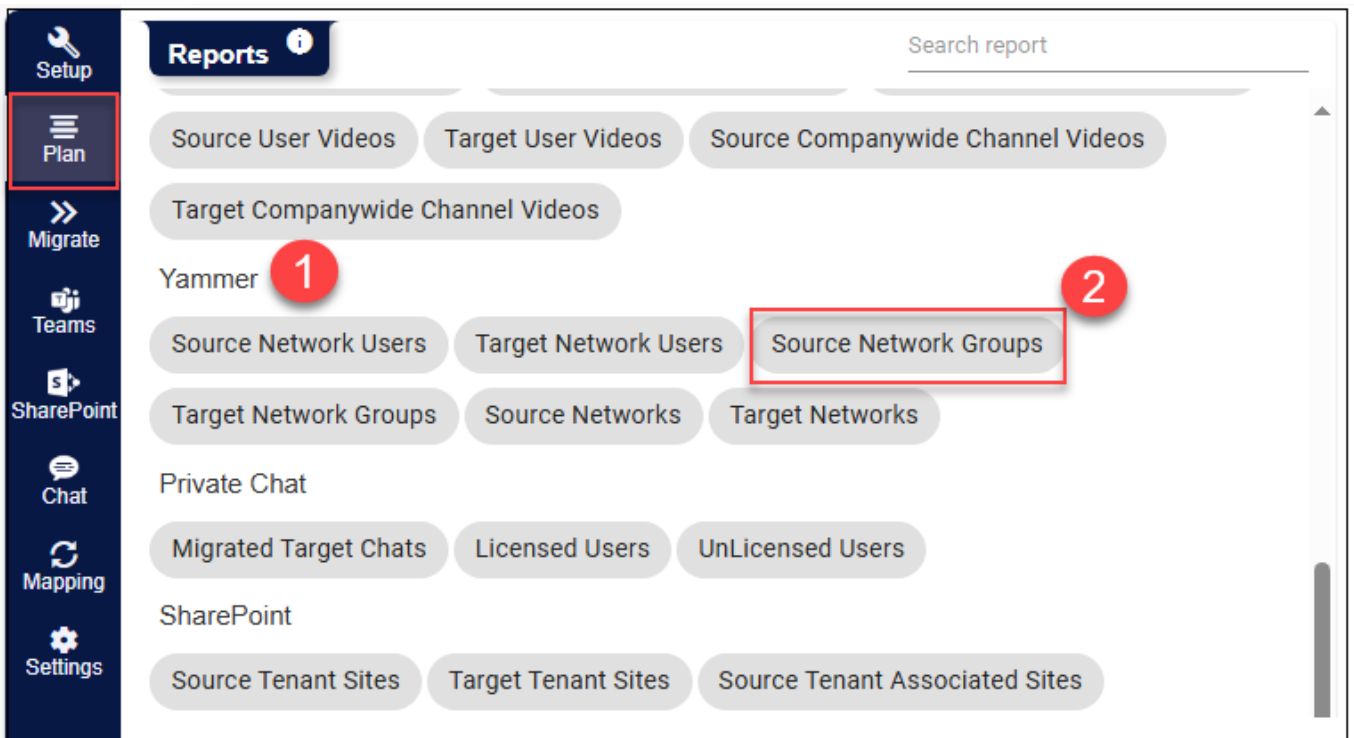
Perform the Application-level User Mapping as shown in *Application User Mapping section*.

Step 2 : Pre-requisites

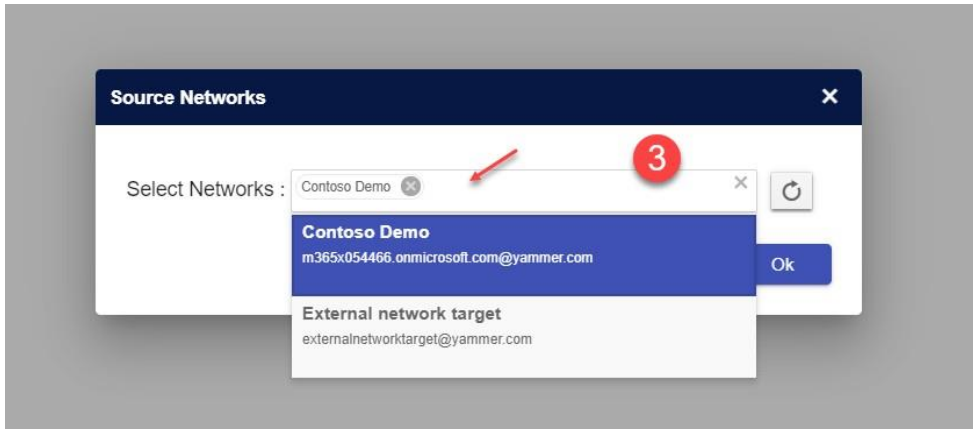
1. All the users should login to Viva Engage(Yammer) portal in target tenant with their accounts at least once before the migration starts.
2. To migrate an External network to target client, a Network has to be pre-existing / created manually in the Target Viva Engage(Yammer) Portal.
3. To migrate a Private group, source connector account should be member of that Private group (Please refer - *How to Add Source Connector account as a member in the Private Group*).

Step 3 : How to Add Source Connector Account as a member in the Private Group?

Go to Plan Tab & Generate the “Source Network Groups” report.



Then Select the Network(s) to list all the groups inside the selected network(s).

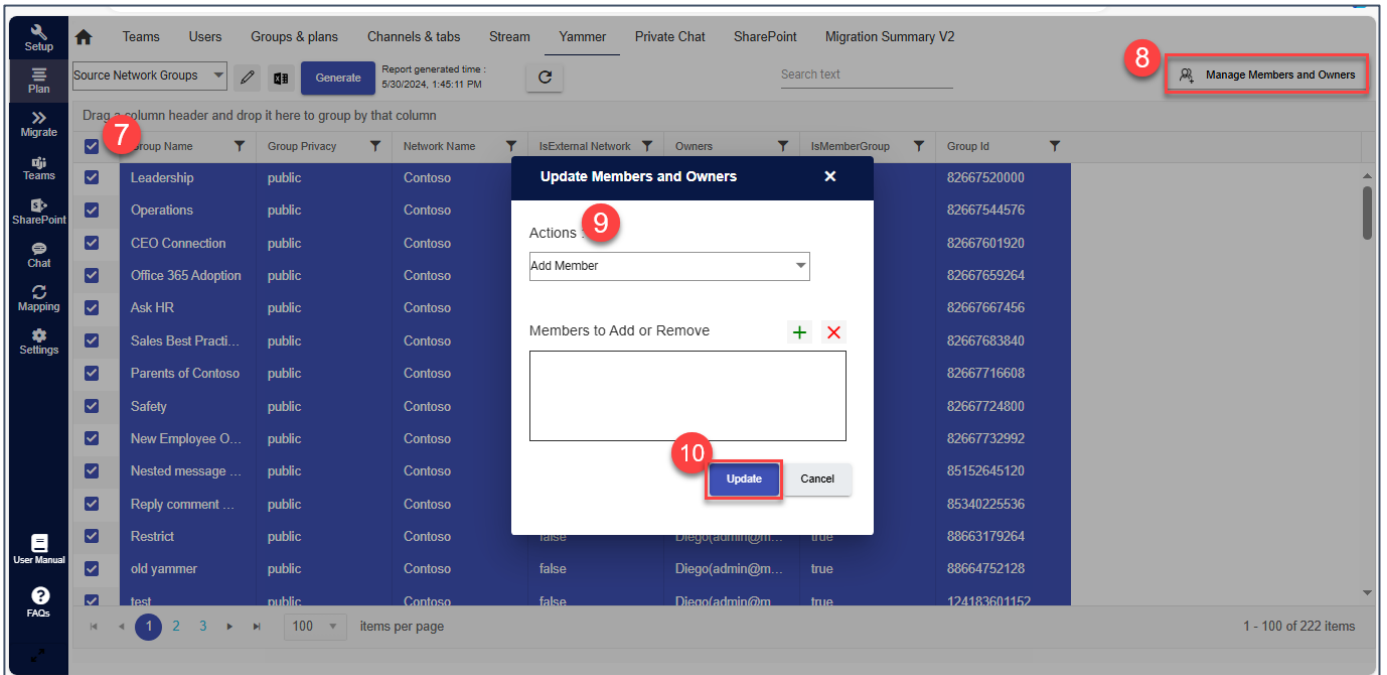


Now filter the Group Privacy column as “private” and IsMemberGroup column as “false”

Group Name	Network Name	IsMemberGroup	IsExternal Network	Owners	Group Privacy	Group Id
sample	Contoso	true	<input type="checkbox"/> Select All	itti Fernandez(...)	private	164139008000
sangi group	Contoso	true	<input type="checkbox"/> true	ego(admin@m...)	public	
check 100	Contoso	true	<input checked="" type="checkbox"/> false	itti Fernandez(...)	private	164148256768
user pf private co...	Contoso	true	1 items selected	ni Sherman(jon...)	private	
user pf public co...	Contoso	true	<input type="button" value="Filter"/>	e Gu(leeg@m3...)	public	
Today19	Contoso	true	<input type="button" value="Clear"/>	ego(admin@m...)	public	
external user in p...	Contoso	true	false	megan(megan@...)	private	
External user in p...	Contoso	true	false	Diego(admin@m...)	public	
sangi private group	Contoso	true	false	Diego(admin@m...)	private	
multiple user group	Contoso	true	false	Diego(admin@m...)	public	
sangi public group	Contoso	true	false	Diego(admin@m...)	public	
'sandi' sinale pri a...	Contoso	true	false	Diego(admin@m...)	private	

Here you can see the private groups where the source connector is not a member.

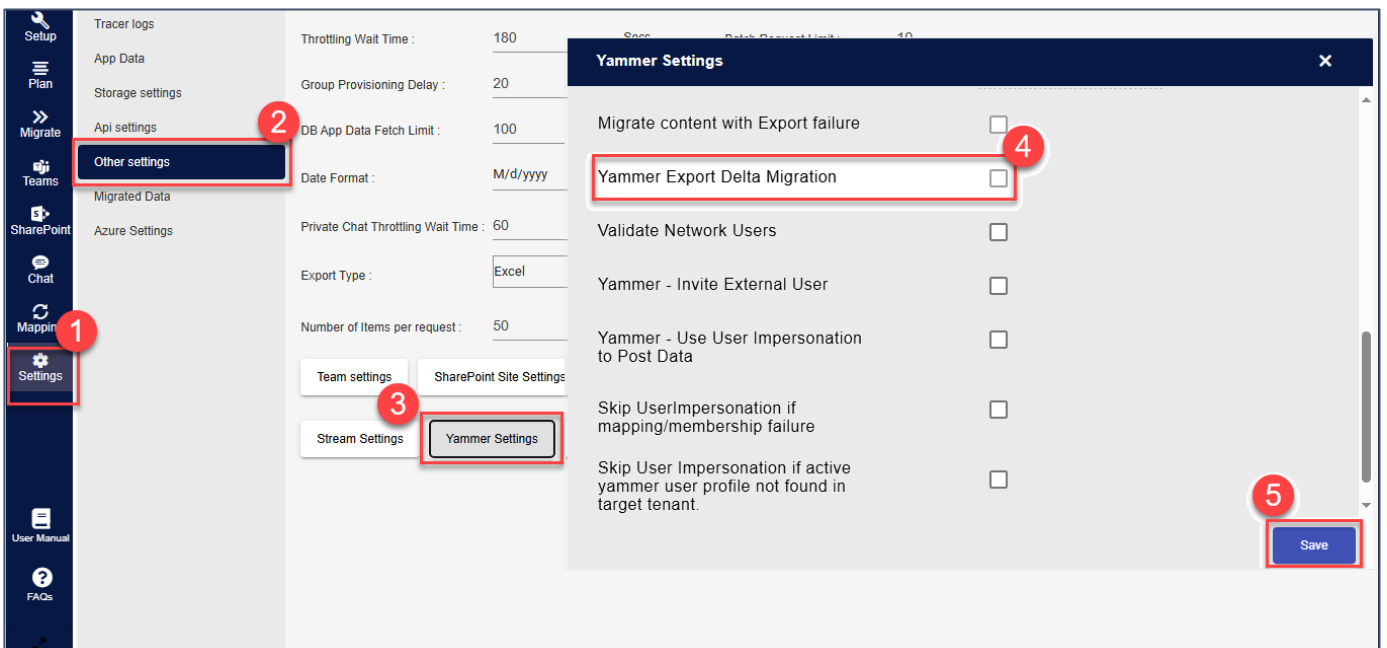
To add the Source Account as member, Select the groups and click on **Manage Members and Owners**. Then add the source connector as a member by clicking on the (+) option and update.



Step 4 : Additional Settings

Viva Engage(Yammer) Export Delta Migration [OPTIONAL]

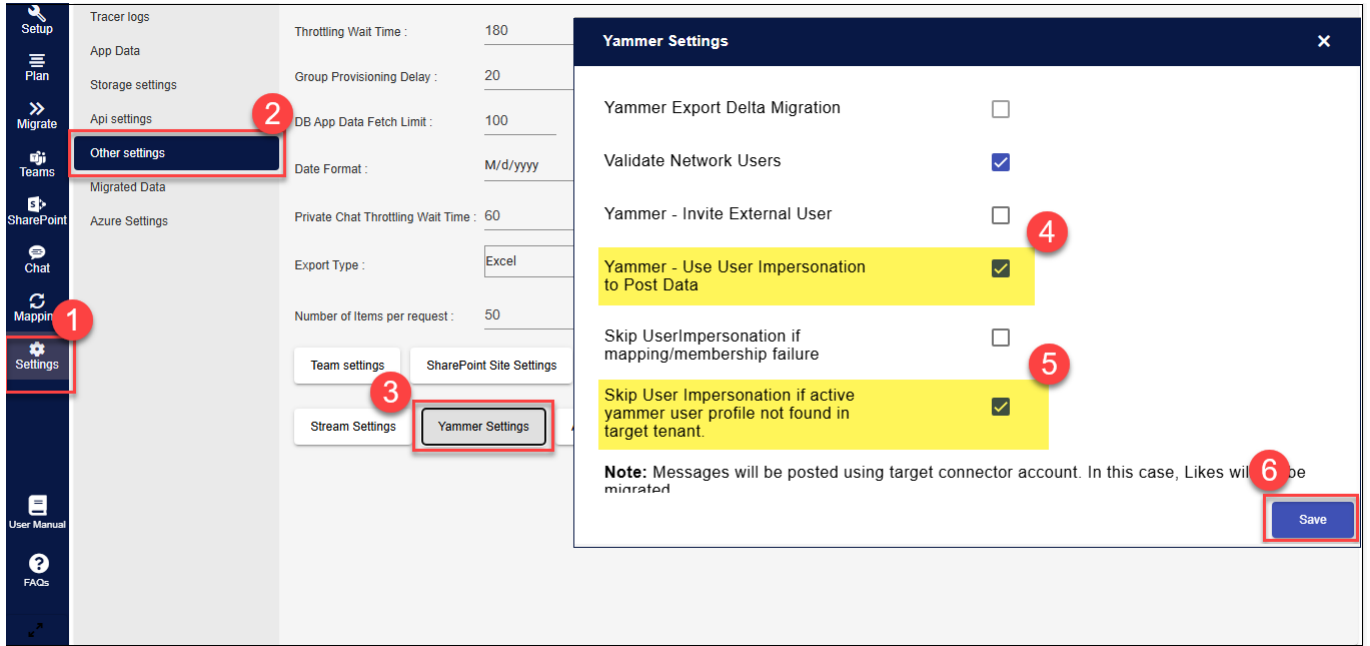
You can perform a Delta Migration in Viva Engage(Yammer) Export by enabling the setting “Yammer Export Delta Migration” as indicated below.



Points to Ponder

Please consider the below points when it comes to User Impersonation(Posts are posted by the users themselves in the target)

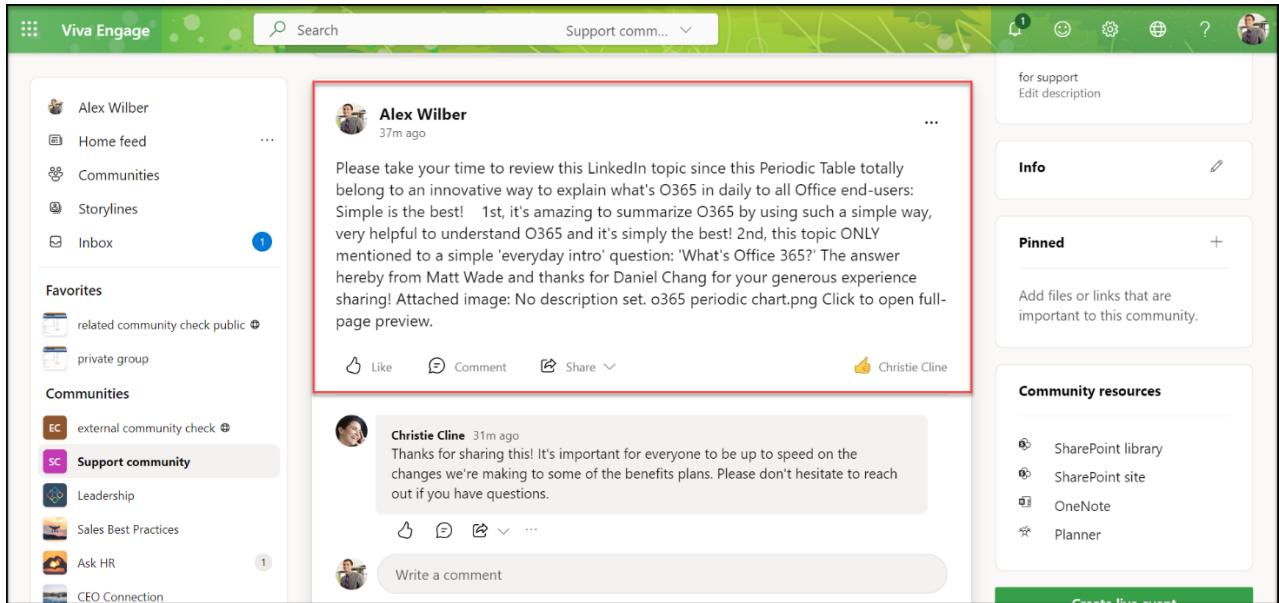
- ❖ BY DEFAULT, Apps4.Pro follows User Impersonation and hence Posts are posted by the users themselves in the target [Step# 4 indicated in the below picture].



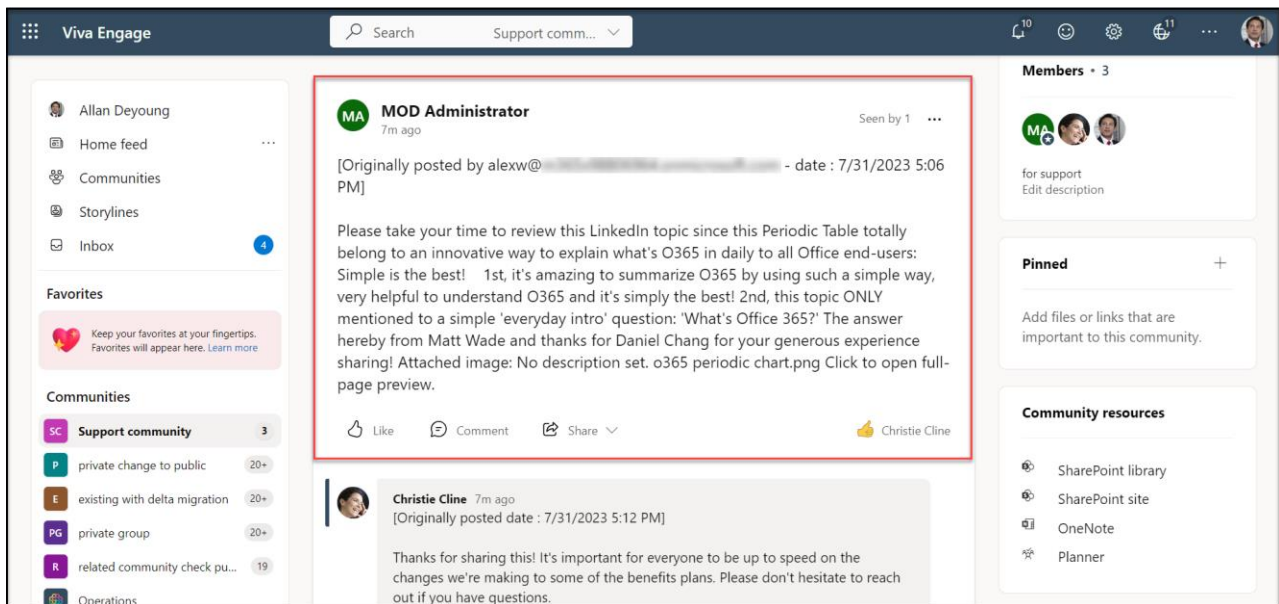
- ❖ If any of the user has skipped the pre-requisite# 1(Users should login to Viva Engage(Yammer) portal in target tenant with their accounts at least once before the migration starts), active user profile will not be found in the target and hence the migration job cannot proceed. To avoid this, TOGGLE-ON the option indicated in Step# 5 of the above picture. This will skip 'User Impersonation' and the posts will be posted by the Service Account instead.

Skipping User Impersonation will look like this :

Source



Target

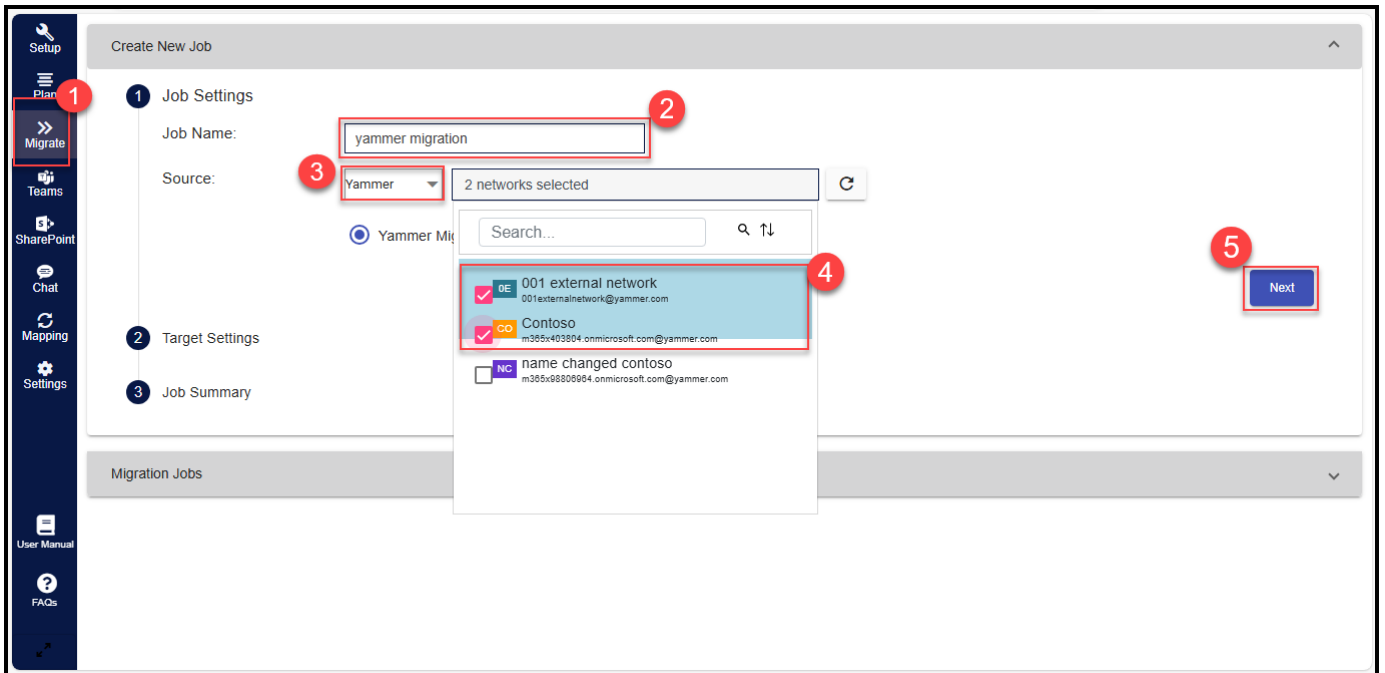


Step 5 : Create Migration Job

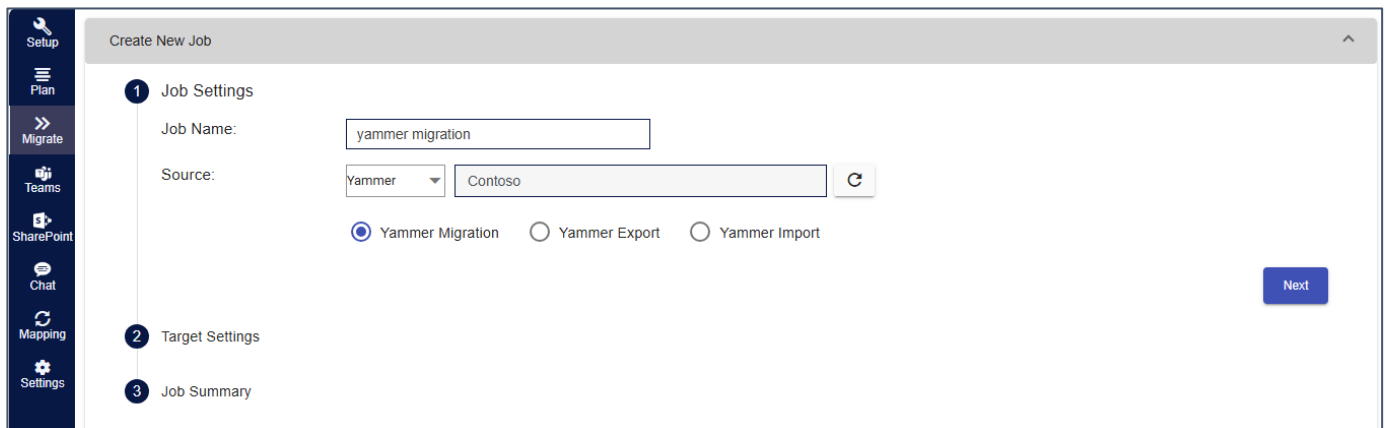
First, you must provide the name of the current Job. In this step, it lists all the internal and external network, you can choose the network(s) to migrate.

Options

1. Viva Engage (Yammer) Migration across tenants : Perform the common migration of Viva Engage(Yammer) networks from Source to destination tenants.



You can also perform a delta migration by specifying Start Date & End Date, to migrate the data within that particular period.



2. Viva Engage (Yammer) Migration between data centers

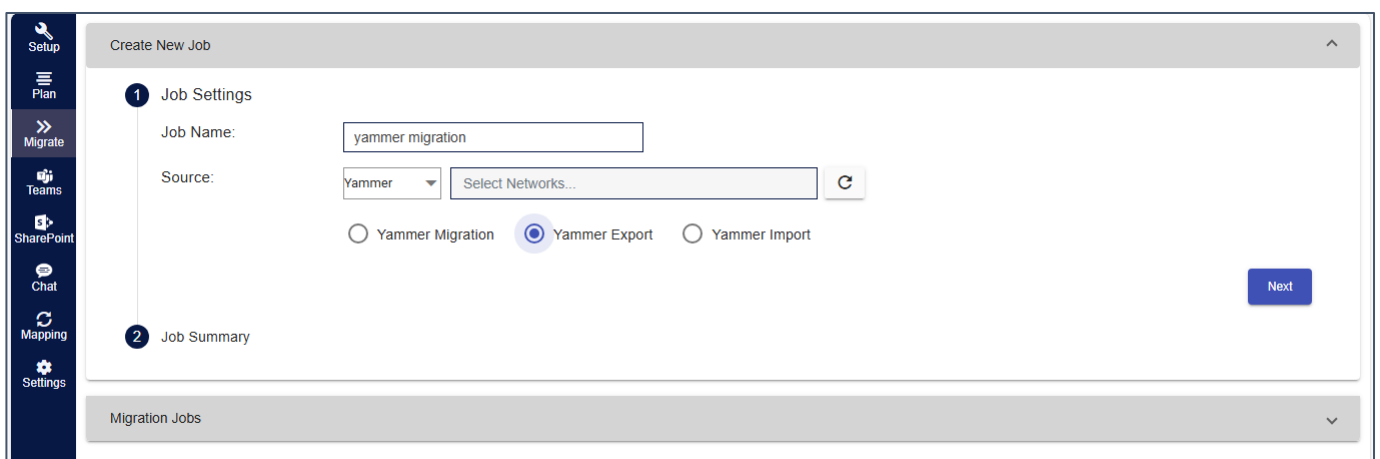
You can use Export & Import options to port the data from US to EU Geo location. Here, please ensure the source Connector is the tenant in the US Geo and the Target is the re-provisioned tenant in the EU Geo.

- Yammer Export** : This option performs a download of the Viva Engage(Yammer) data from tenant in the Source Data Center and saves the data offline. If you have enabled the setting “Yammer Export Delta Migration” as mentioned [in this step](#), you will find Start Date & End Date, to export the data within that input period.

Do remember to perform this step before the tenant cut over in the US Data Centre.

- Yammer Import** : This option uploads the offline downloaded data(via export) to the tenant in the Target Data Center.

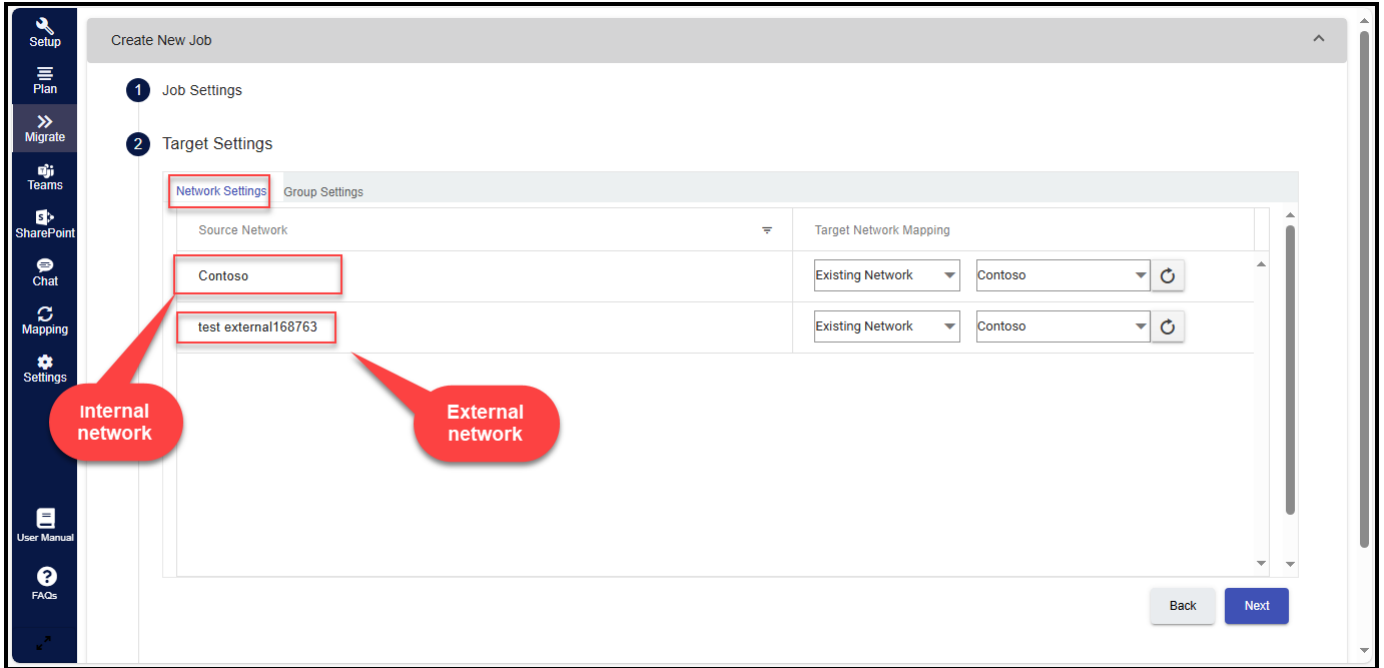
Perform this step post completion of the re-provision of Viva Engage(Yammer) Network in EU Data Centre.



Step 6 : Target Settings

Network Settings

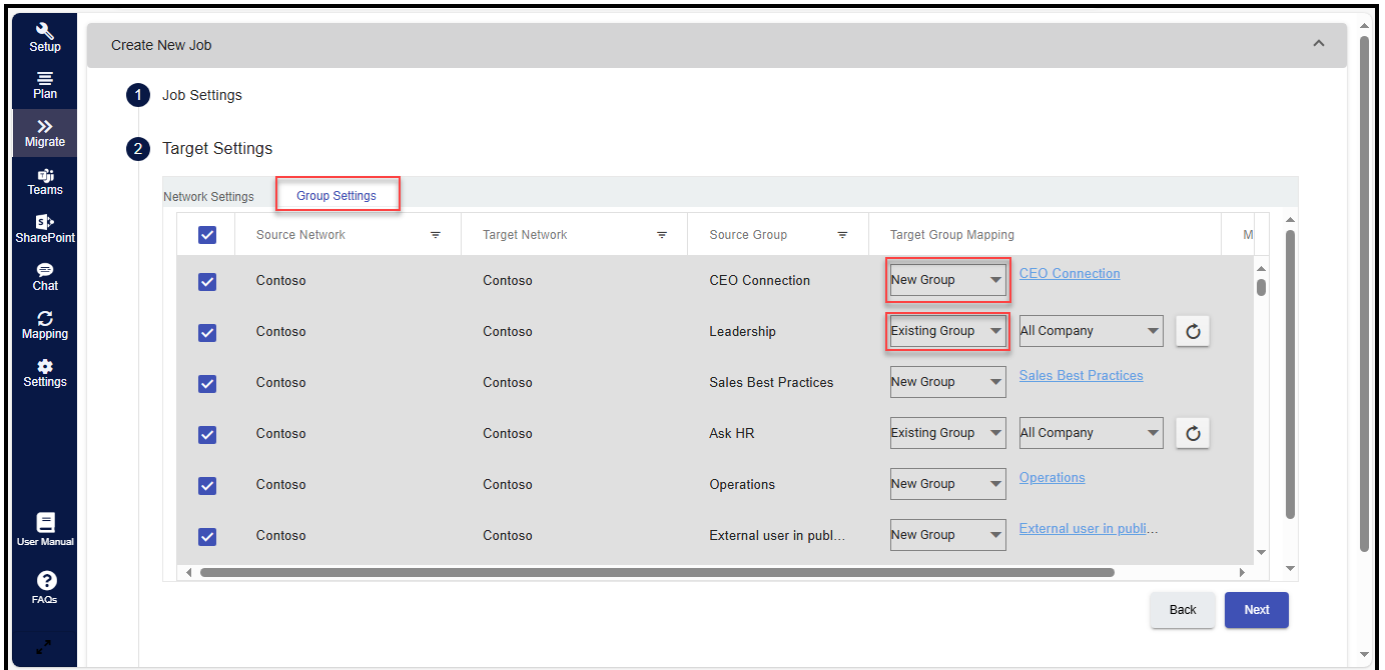
In this step, you can provide the target network(s) to migrate data. You can only map the internal network with the target internal network and similarly External network with Target external network (cross network mapping not allowed).



Group Settings

In this step, you can provide the target group(s). You have following options to select target groups.

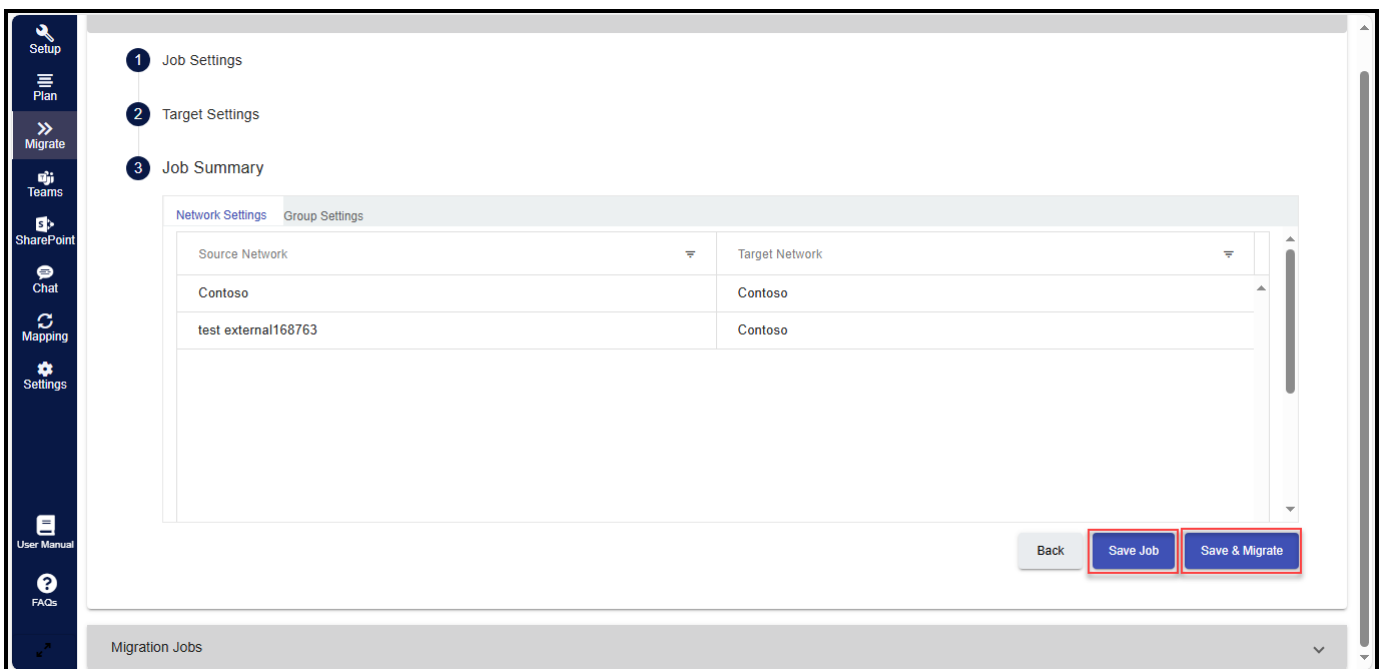
- Migrate into a new group.
- Migrate into an existing group.



Step 7 : Job Summary

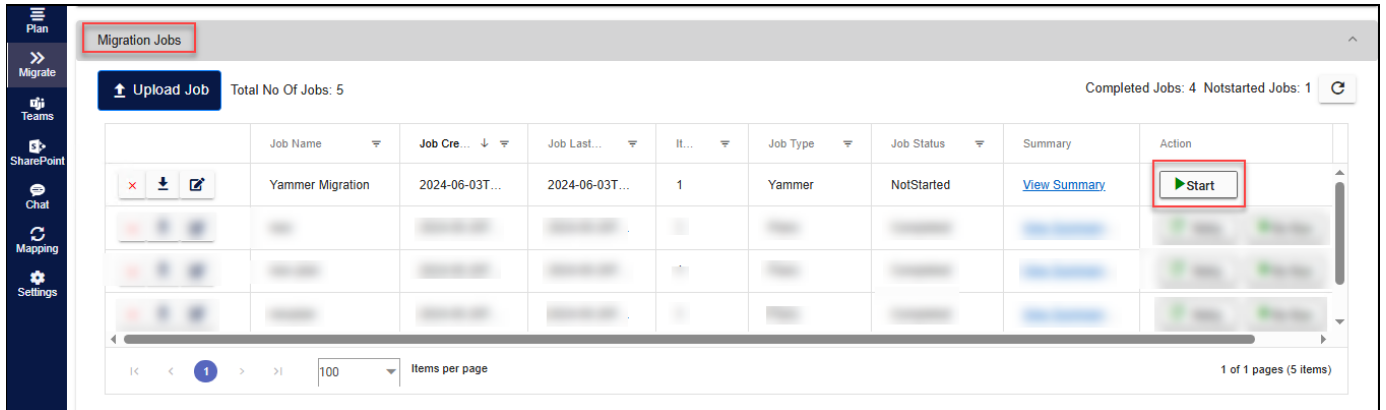
In this step, you can view the summary of job. After checking the summary, you can select one of the following two options.

- Save Job -> It saves the current job, then you can run later by clicking Start button from Migration Jobs grid.
- Save & Migrate Job -> It saves the current job and starts the migration process immediately.



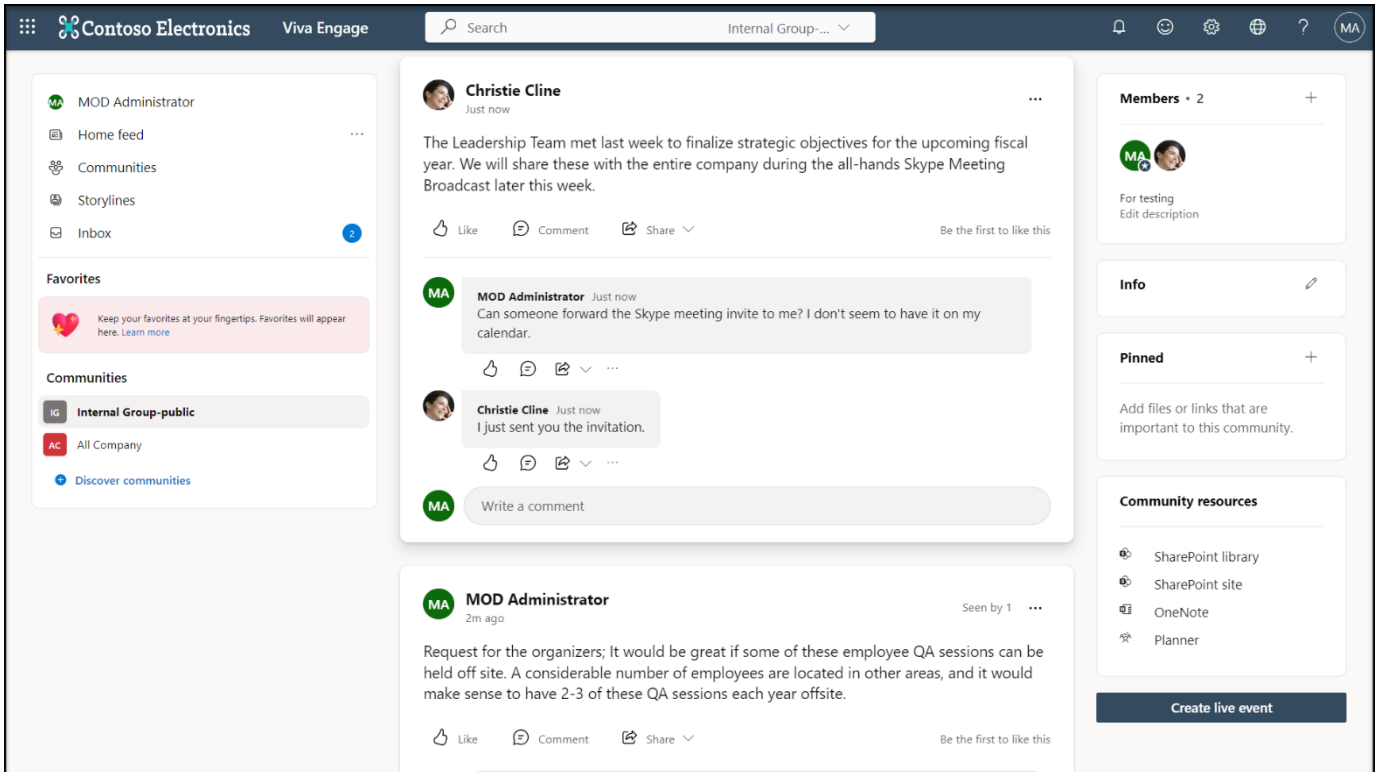
Execute Saved Jobs

Under Migration Jobs tab – the list of Jobs and their summary are listed. You can opt to run the previously saved jobs as below.



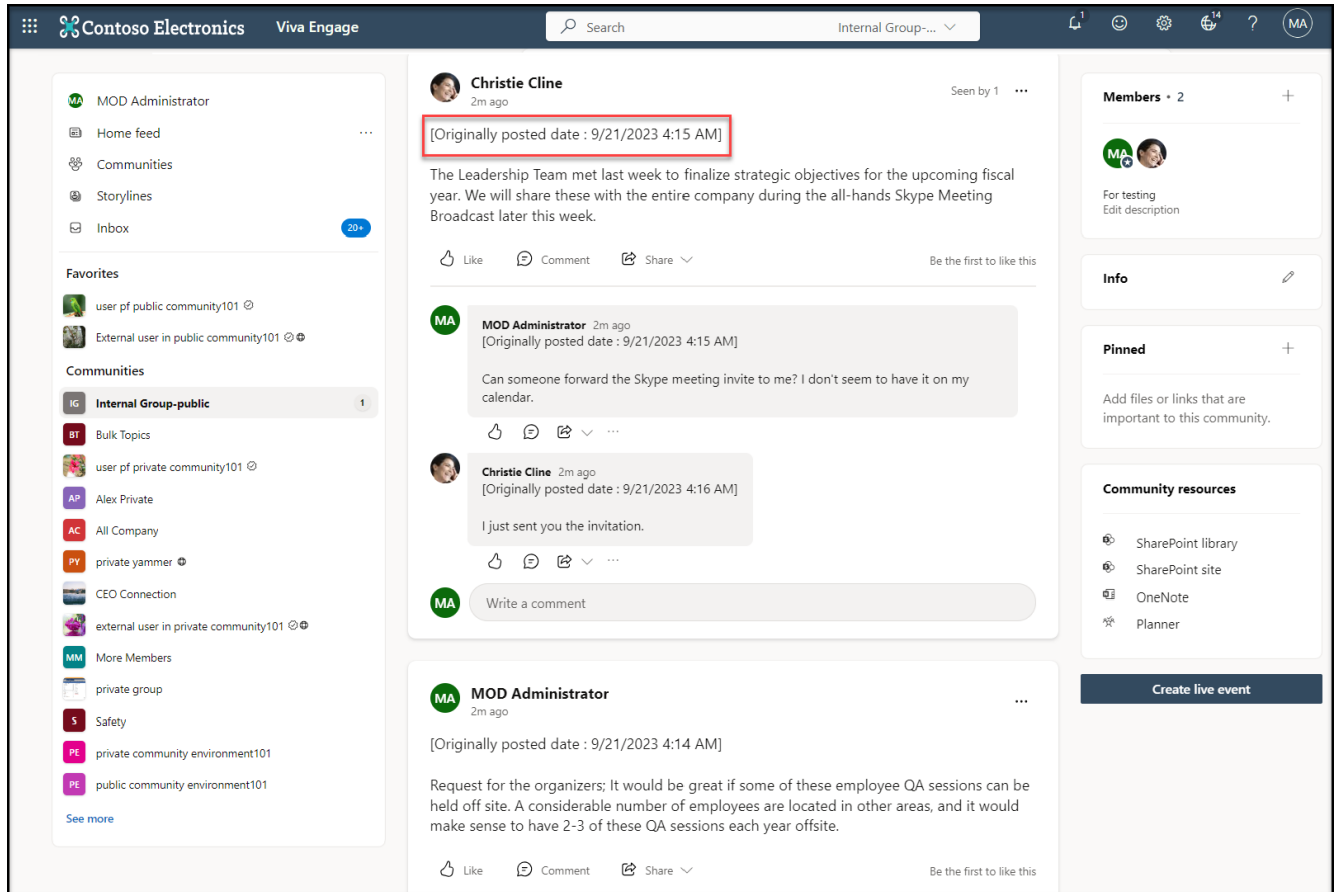
User Experience

Source



Target

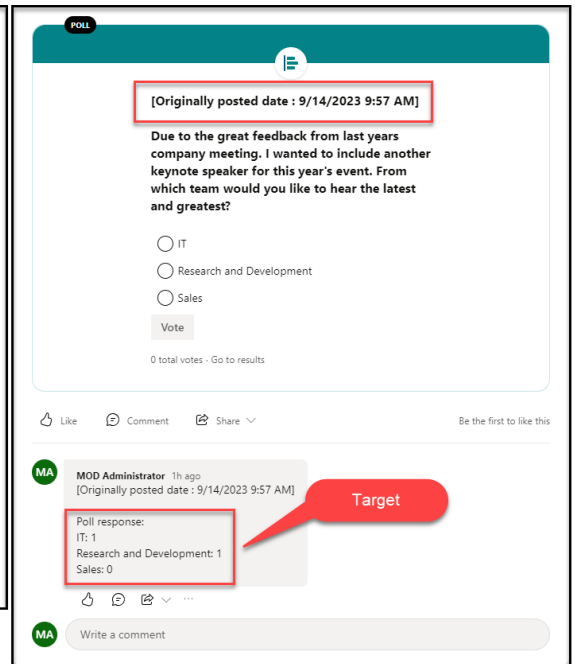
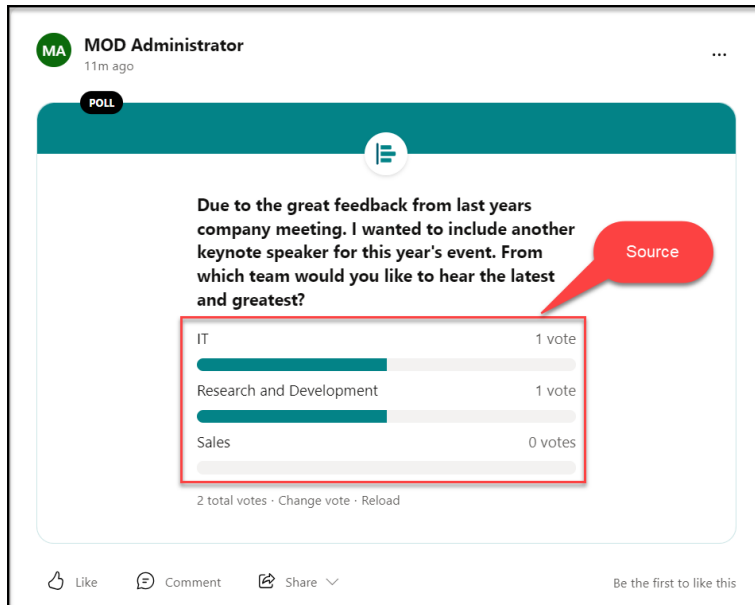
In the migration experience, the conversations will be posted by the actual user with posted time and date at the top.



Impact

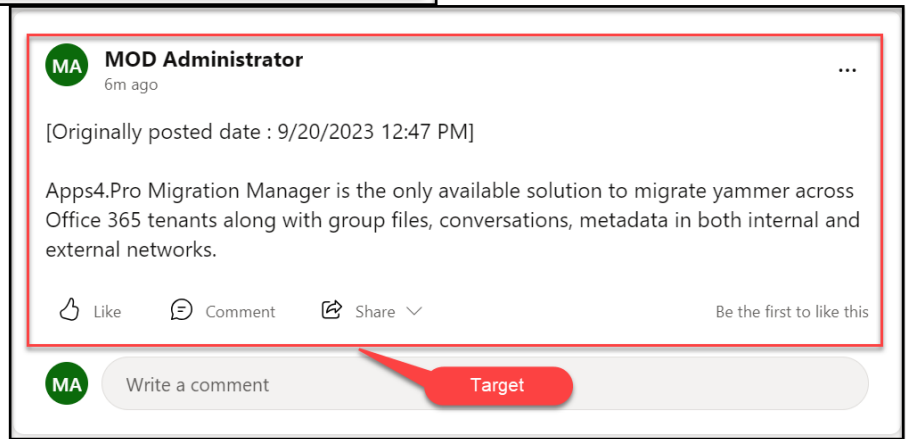
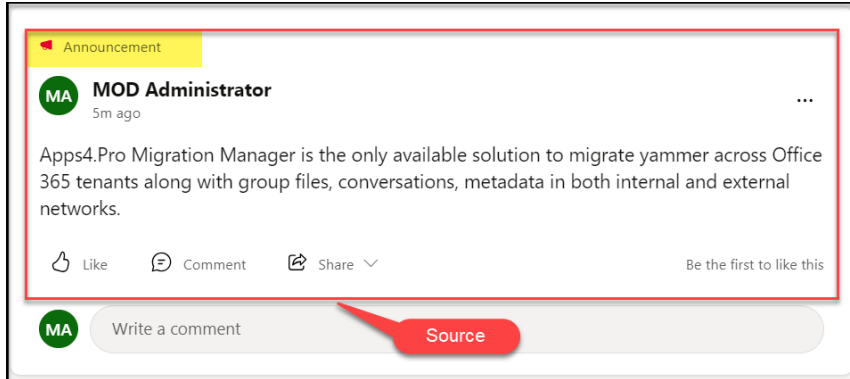
1. Polls

The Poll Response in Source are posted as Comment in the Target.

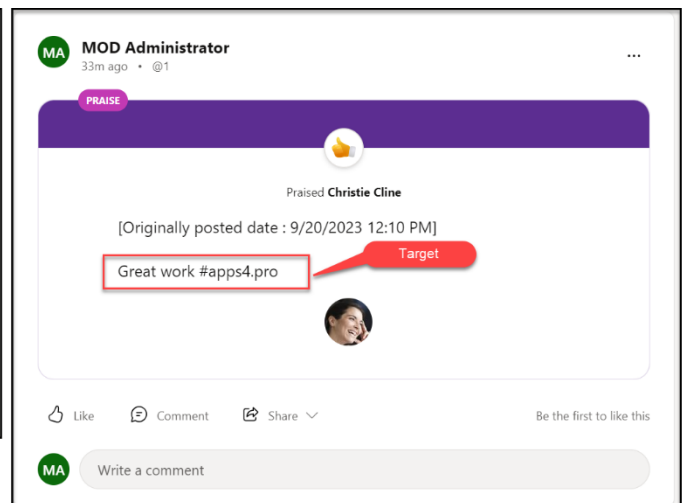
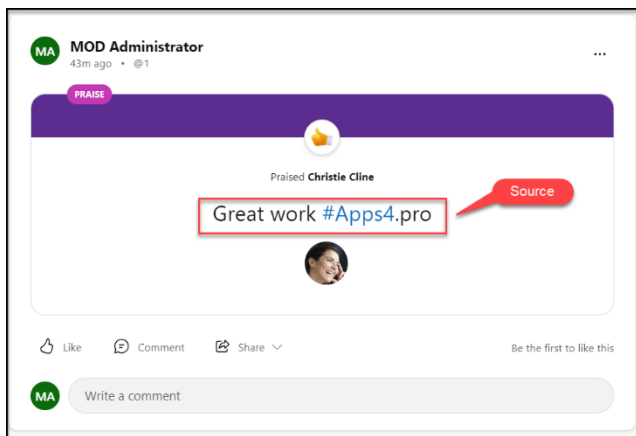


2. Announcement Messages

Announcement Messages will be migrated as Normal Conversations due to API limitations.



3. Tags in Praise Messages will be migrated as a regular text



4. Style Formats

Style Formats will not be reflecting in Target as in Source Tenant.

MA MOD Administrator 52m ago Source

The Leadership Team met last week to finalize strategic objectives for the upcoming fiscal year. We will share these with the entire company during the all-hands Skype Meeting Broadcast later this week.

Like Comment Share Be the first to like this

MA Write a comment

MA MOD Administrator 1h ago Target

[Originally posted date : 9/16/2023 9:36 AM]

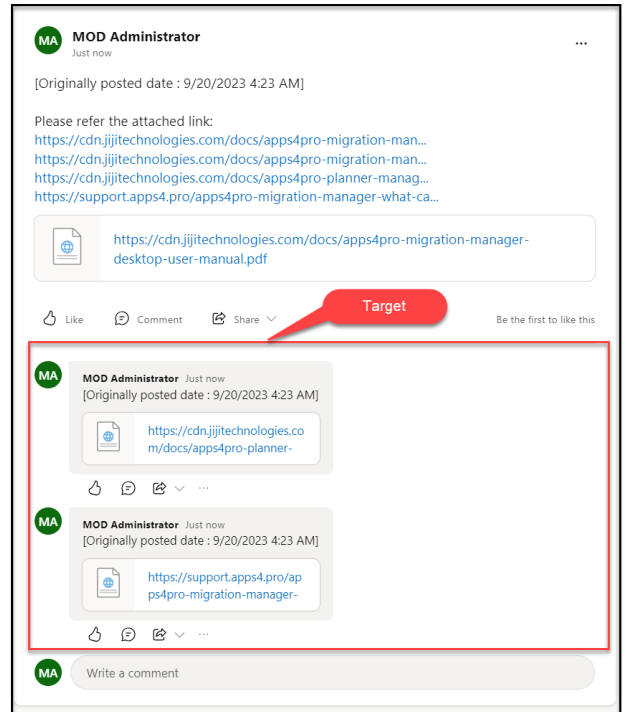
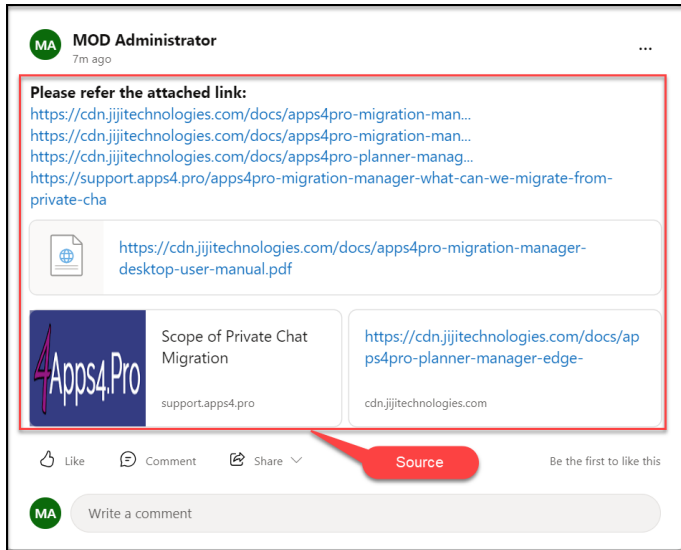
The Leadership Team met last week to finalize strategic objectives for the upcoming fiscal year. We will share these with the entire company during the all-hands Skype Meeting Broadcast later this week.

Like Comment Share Be the first to like this

MA Write a comment

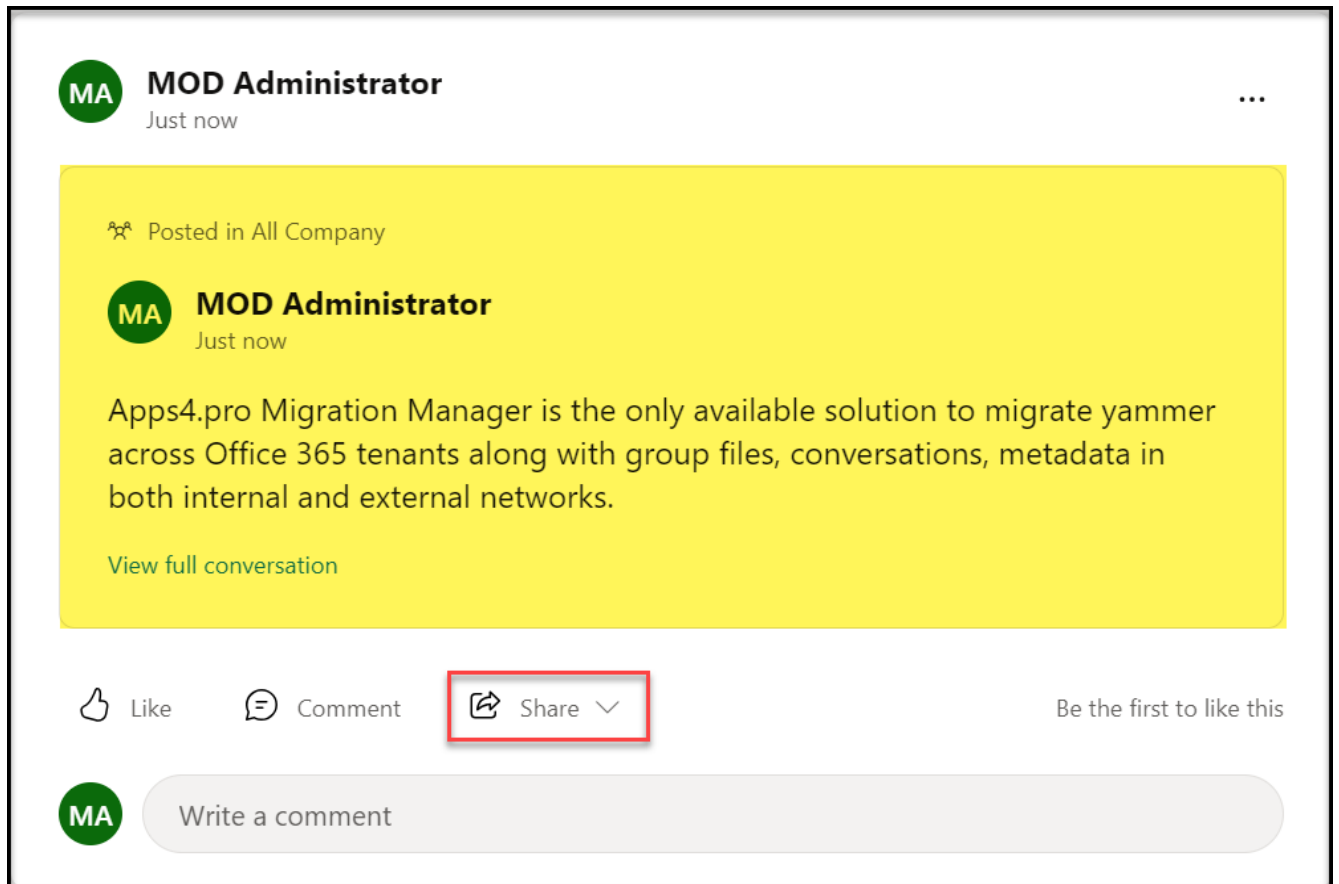
5. URL in Conversation

If you post Multiple URLs in a single post, then it will migrate each link as separate conversations.



6. Shared messages

The messages that are shared from another group will not be migrated.



7. Incremental Migration

The new Network Users / Groups / Group Members will not be supported in the Incremental Migration.

8. External user

When performing the migration of an Internal group with External members, the external members will not be added to the target tenant by default whereas the conversations will get migrated.

As this action adds the external user to the Azure Active Directory, it is not viable to get them added directly in the target tenant. Rather the user can send an invite post migration to get them added to the group.

Email Notification

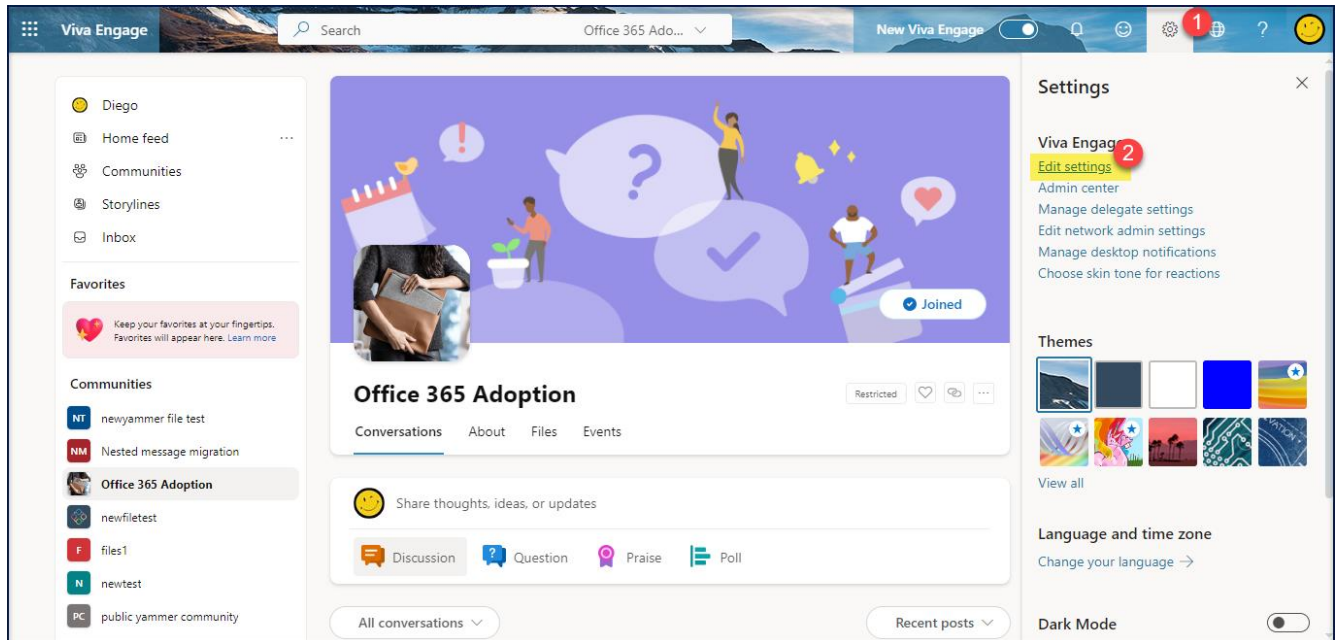
End users get an email notification when migrating the below mentioned items.

- ✓ Group invite
- ✓ Praise
- ✓ Update

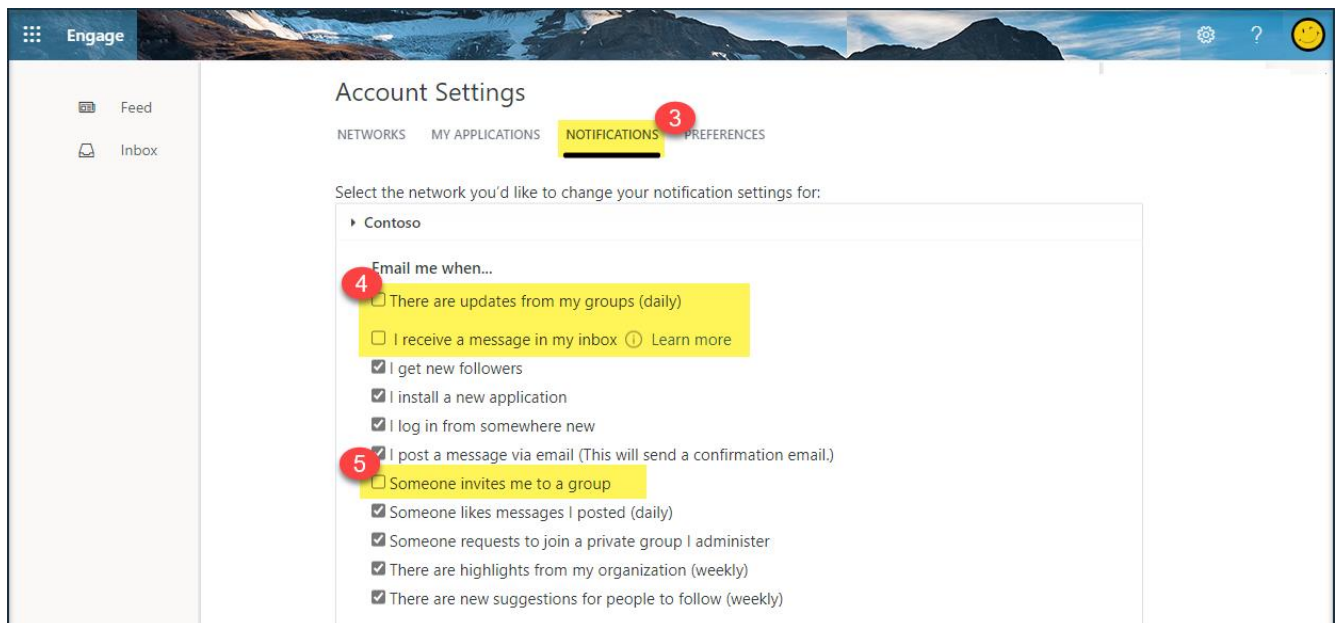
- ✓ Update with @ mentions
- ✓ Announcement

In order to prevent these unpleasant notifications, each end user needs to enable the below options before initiating the migration.

Click on Settings in the target tenant → Click the 'Edit settings' option.



Then Navigate to Notifications Tab → here you can see the listed Networks which is available in the tenant. Need to unselect the options which are marked in the below image for each of the network you are planning to migrate.



6. Groups Migration

Step 1 : Setup & Configuration

Setup : License and Roles

1. **Microsoft 365/Office 365(E3 or E5) License** is required for Source & Target Connector Accounts.
2. **Microsoft Planner License** is required for both Source & Target Connector accounts.
3. **Exchange Online License** is required for Target Connector Account.
4. **Groups Administrator** role is required for both Source & Target Connector accounts.
5. Source Connector Account should be an Owner & Member of the "Groups" that you chose to migrate. (Please refer section :- *How to Add 'Source Connector Account' as a member of the Groups*)

Configuration : Connector Accounts – Sign-in

Perform the Source & Target Connector Accounts Sign-in as shown in *Global Configuration section*.

Additional Configuration : Additional Connector Accounts – Sign-in

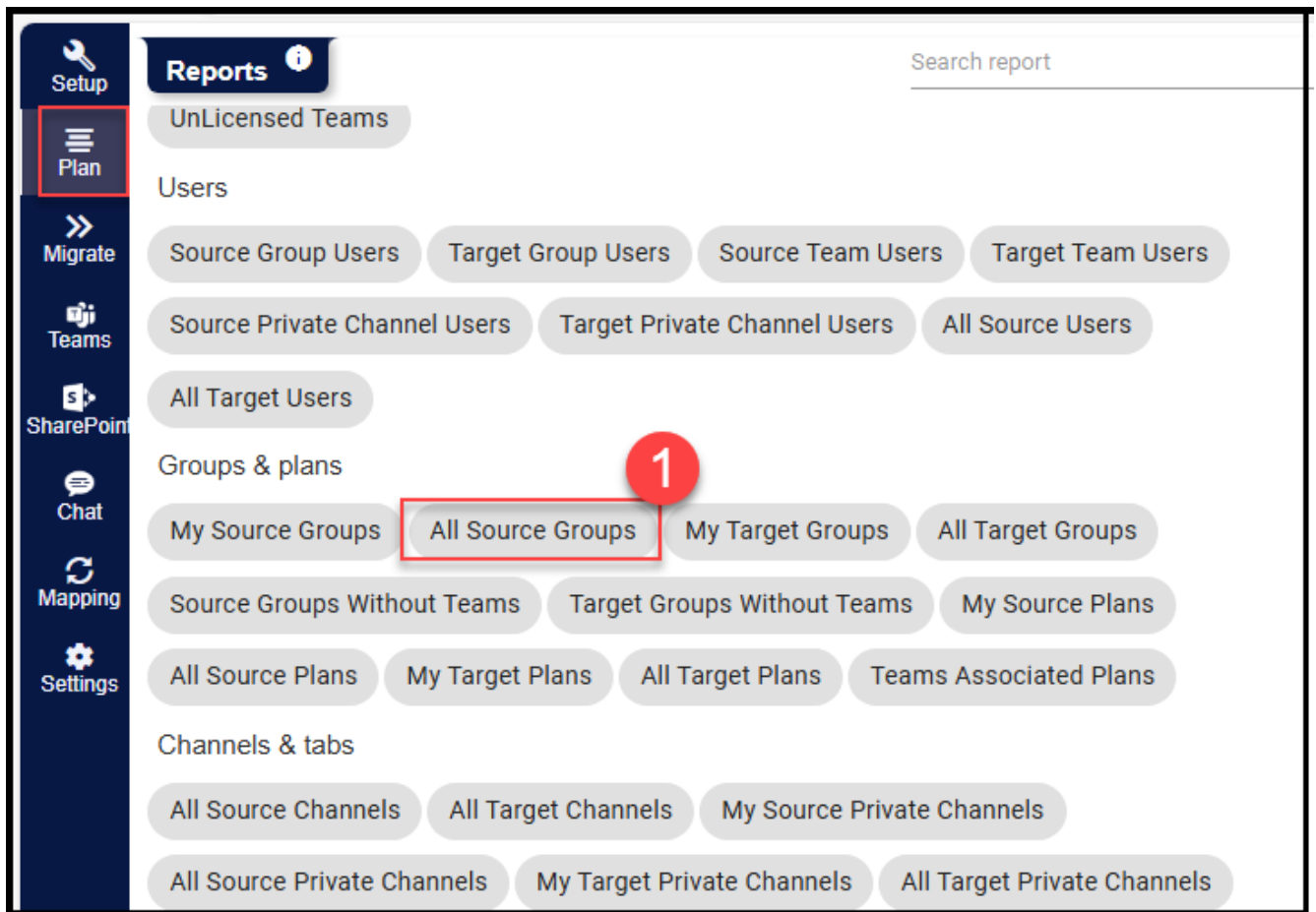
Perform the additional Source & Target Accounts Sign-in as shown in *Additional Configuration section*.

Mapping : Application User Mapping

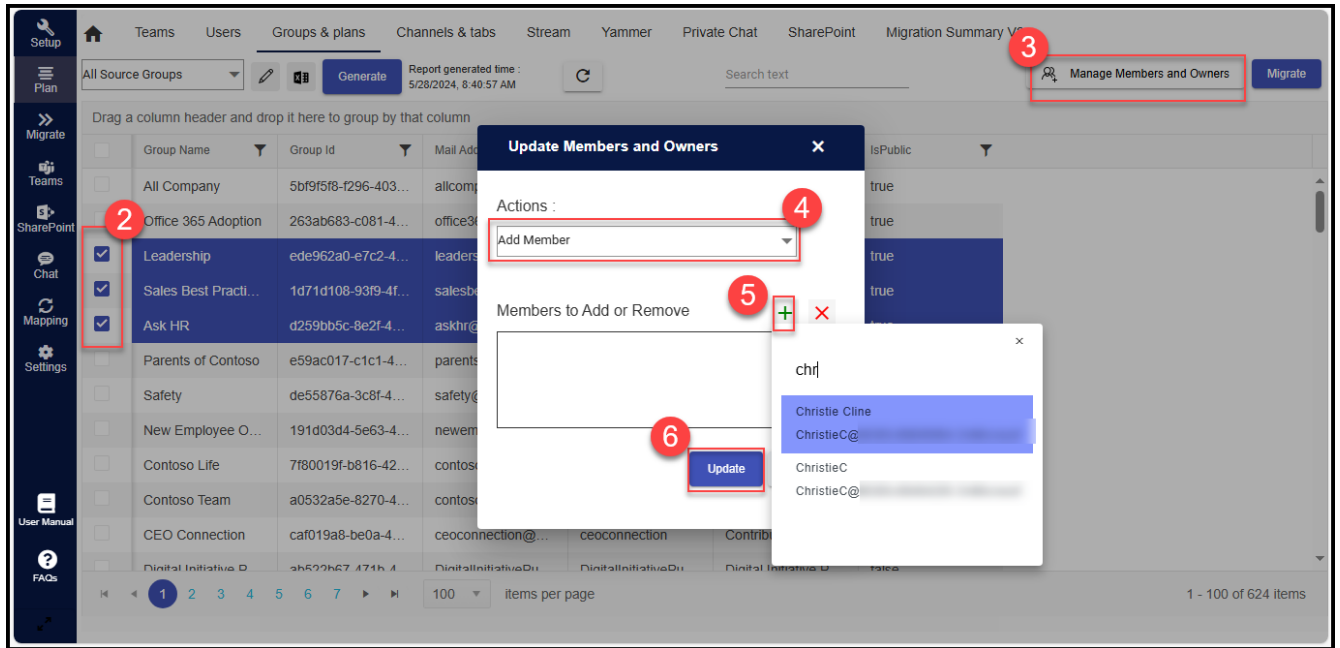
Perform the Application-level User Mapping as shown in *Application User Mapping section*.

Step 2 : How to Add 'Source Connector Account' as a member of the Groups

Go to **Plan Tab** -> Generate the "All Source Groups" report.



Then select the groups to be migrated where you need to add as member and click on **Manage Members and Owners** option and add the Source Connector Account under Member and update.



Step 3 : Create Migration Job

First, you must provide the name of the current job. Then select **Groups** as source and then you can select the required source tenant group(s) to migrate.

Download Sample CSV : When you have to upload a bunch of Groups through the highlighted option – “**Select Groups from CSV**”, you can always use the Download option to download a sample format.

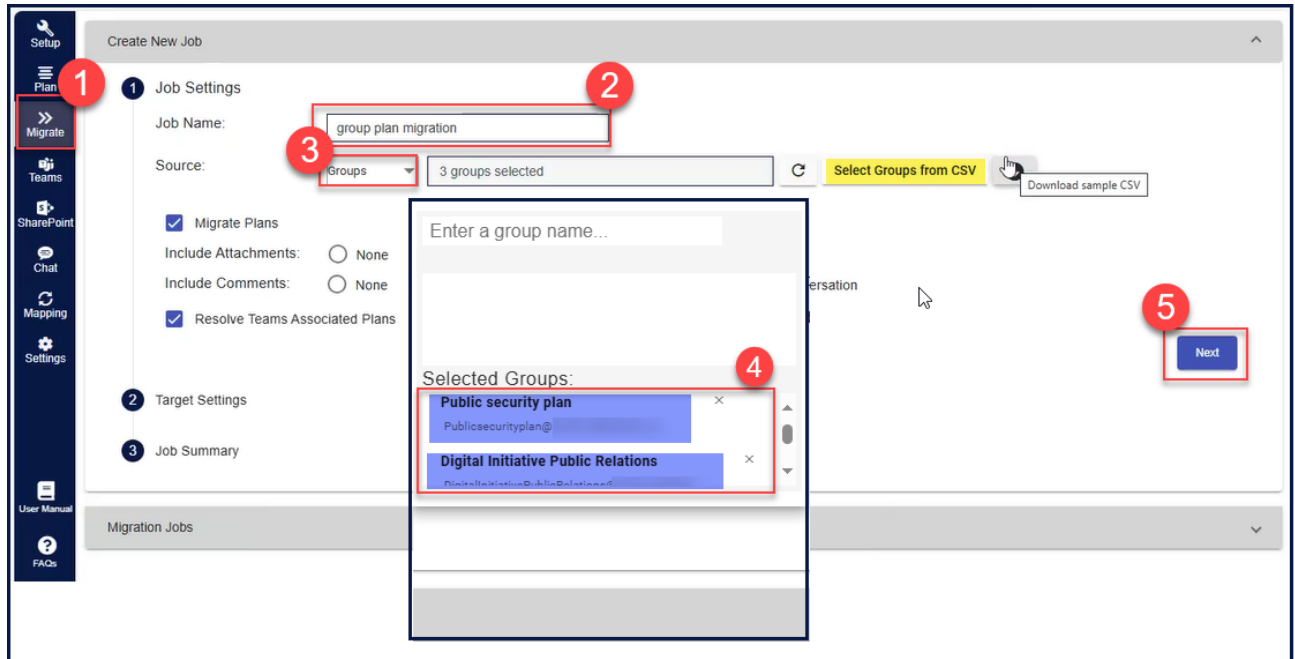
You can provide the source & target details to save time entering these information in the target settings. [Providing the Group Id ensures to pick the right group](#) when there are multiple groups with the same name.

Sample CSV :

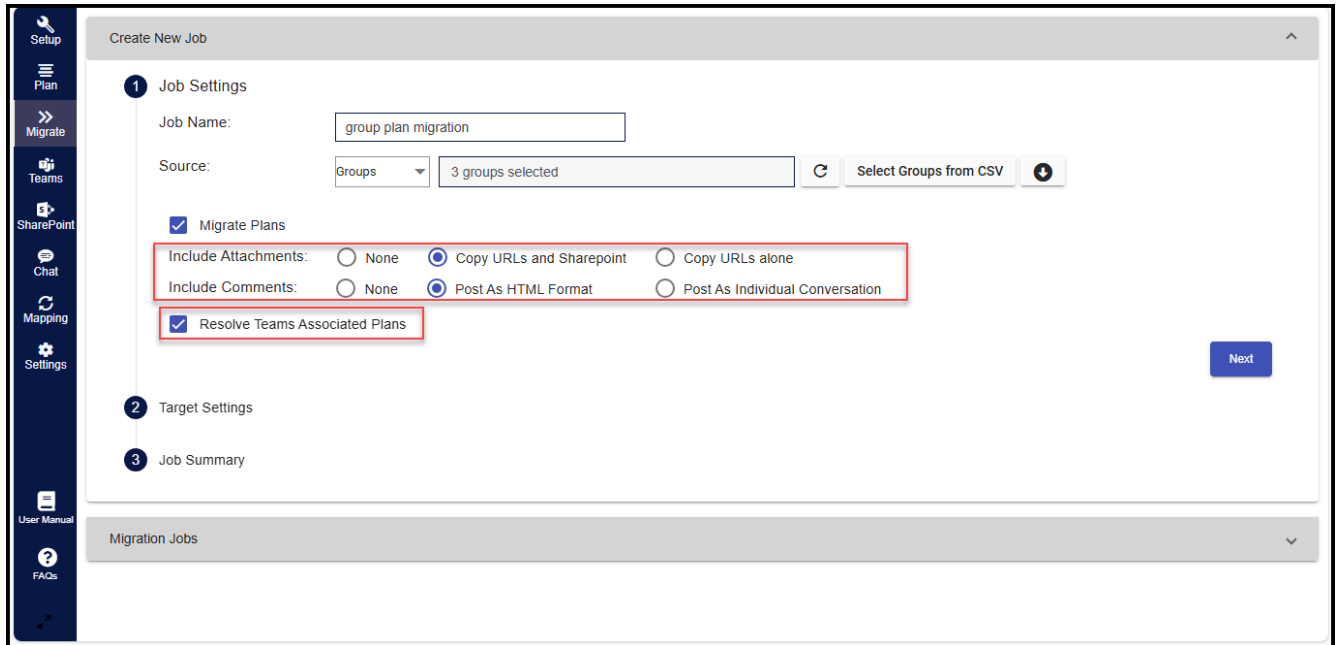
SourceGroupName	SourceGroupId	TargetGroupName	TargetGroupId	TargetGroupMailnickName	MigrateGroupSettings	MigrateGroupUsers
All Company	4c82aeda-f296-43a9-a80a-c789216976t	Sales and Marketing		Salesmarket	Yes	No
Analysis	4918c791-3b78-4353-8ad2-41f2073bfe:	Retail		retail	Yes	Yes
Apps4Pro Products	73de47bc-ac48-41ea-b45d-740a1370df	Communications	ac6704fb-1365-401f-b40a-7bf8277d		No	Yes
Admin team	481e7bd8-1a29-4bff-9974-74b53fd586:	Analysis	d3117d26-2fa2-4162-8dc1-2554dad		Yes	No

Migrate Plans

- You must select **Migrate Plans** option to Migrate the plans associated with the selected Groups.
- Download Sample CSV** : When you have to upload plans part of a bunch of Groups through the highlighted option – “**Select Groups from CSV**”, you can always use the Download option to download a sample format.



- You can choose how the attachments and comments has to be migrated to the target from the options as in below screenshot.
- **Resolve Teams Associated Plans** – This option is completely **OPTIONAL** and the user has to select / deselect based on the scenario.
 - **Select** this option only when some of the plans you are migrating are part of teams.
 - **Deselect** this option when you are sure that none of the “plans to be migrated” are part of Teams. In this case, Team related details are not retrieved, which in turn **improves the performance of the Migration.**



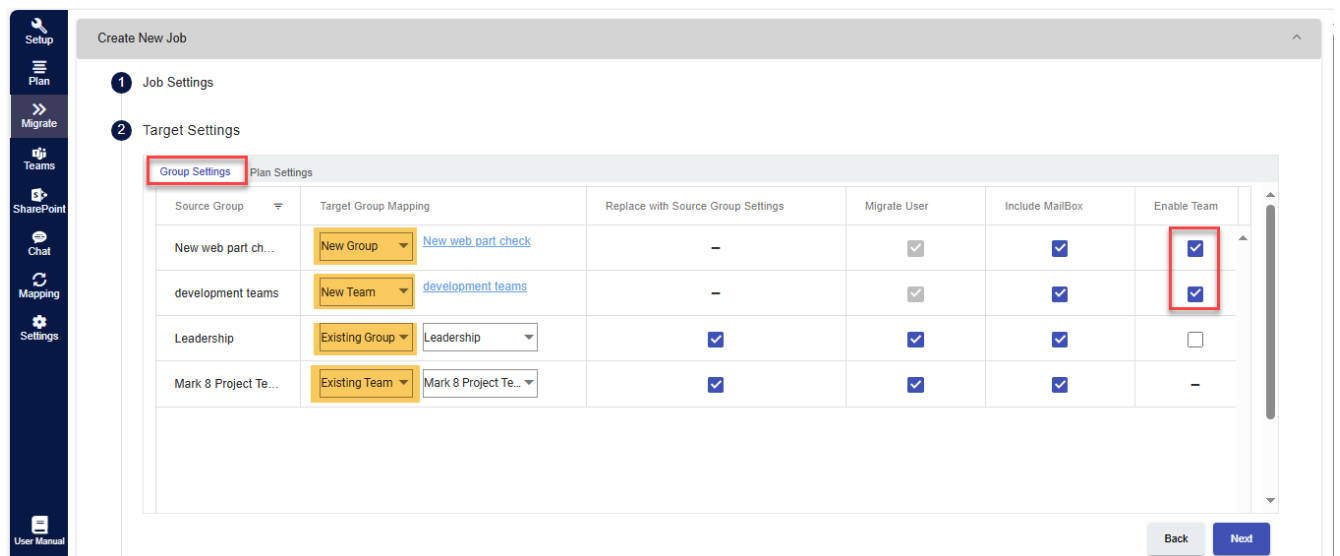
Step 4 : Target Settings

Group Settings

In this step, you can provide the target group(s) to migrate mailbox. You have following options to select target groups.

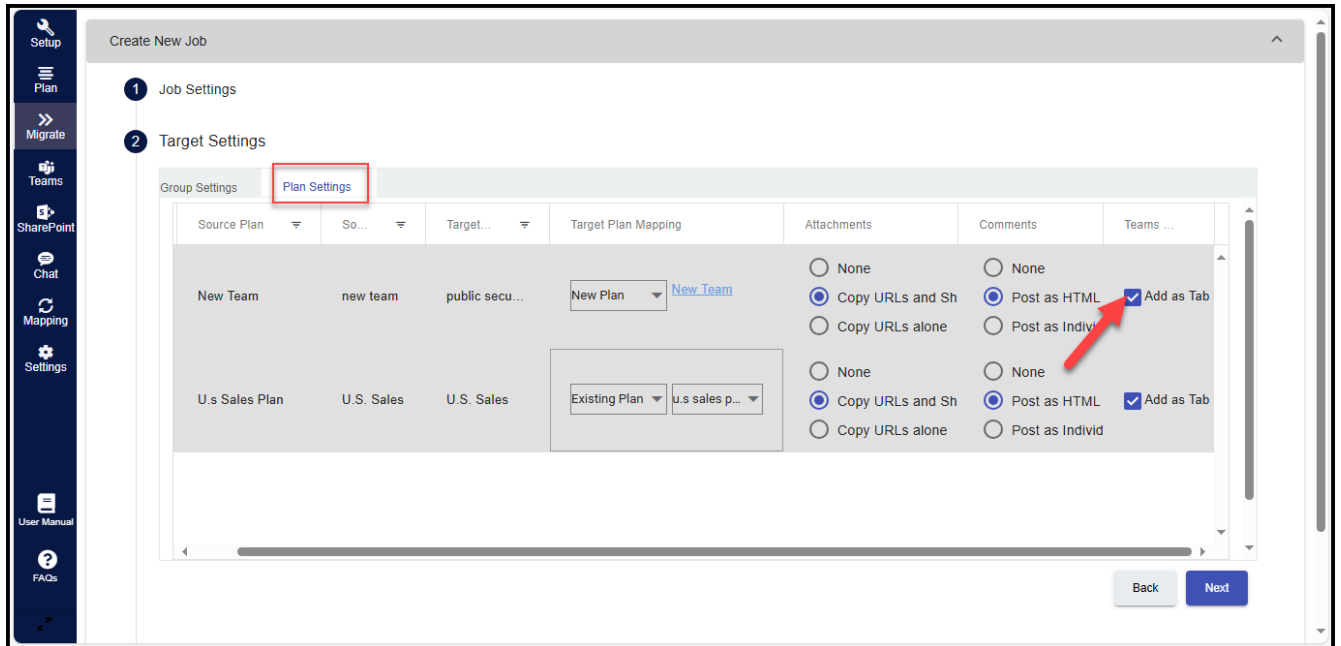
- **Migrate into the new group/team.**
- **Migrate data to the existing group/team.**

If you select 'New Group' or 'Existing Group' option, then you can enable the team for that group.



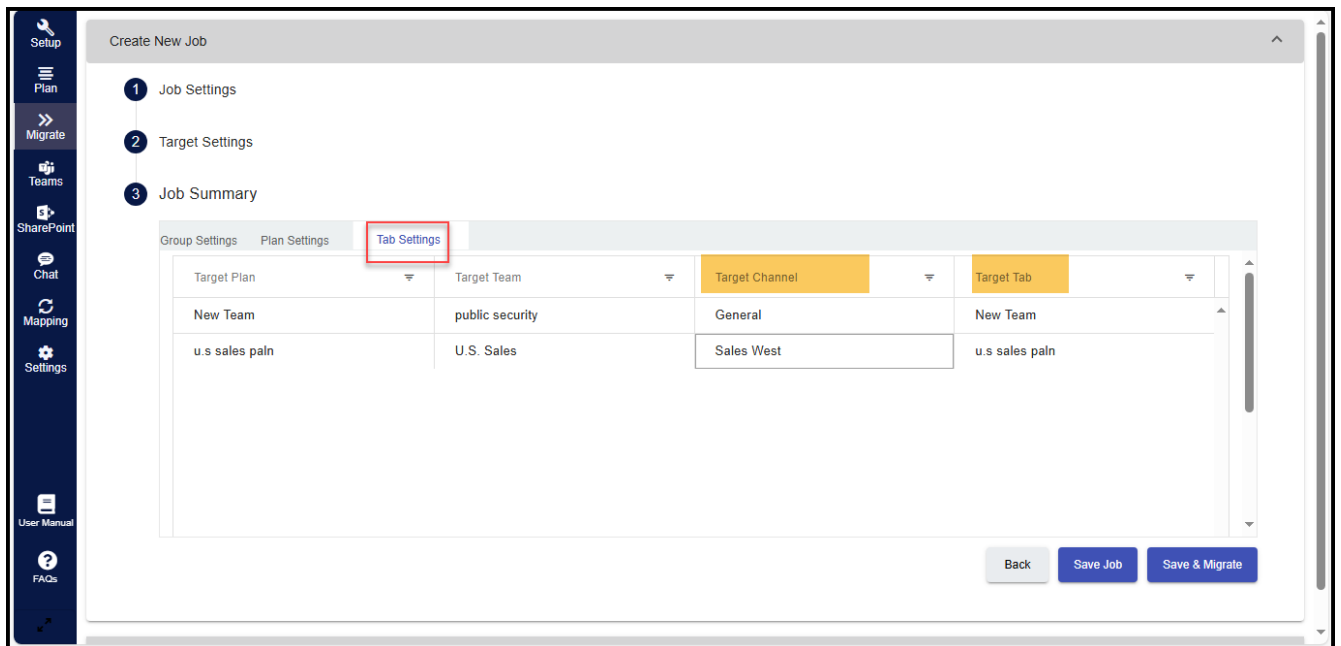
Plan Settings

Under this settings tab, select the required plans to migrate into New or Existing Plan and select the format of the planner task attachments and comments, as well as you can select the option 'Add as Tab in Teams'.



Tab settings

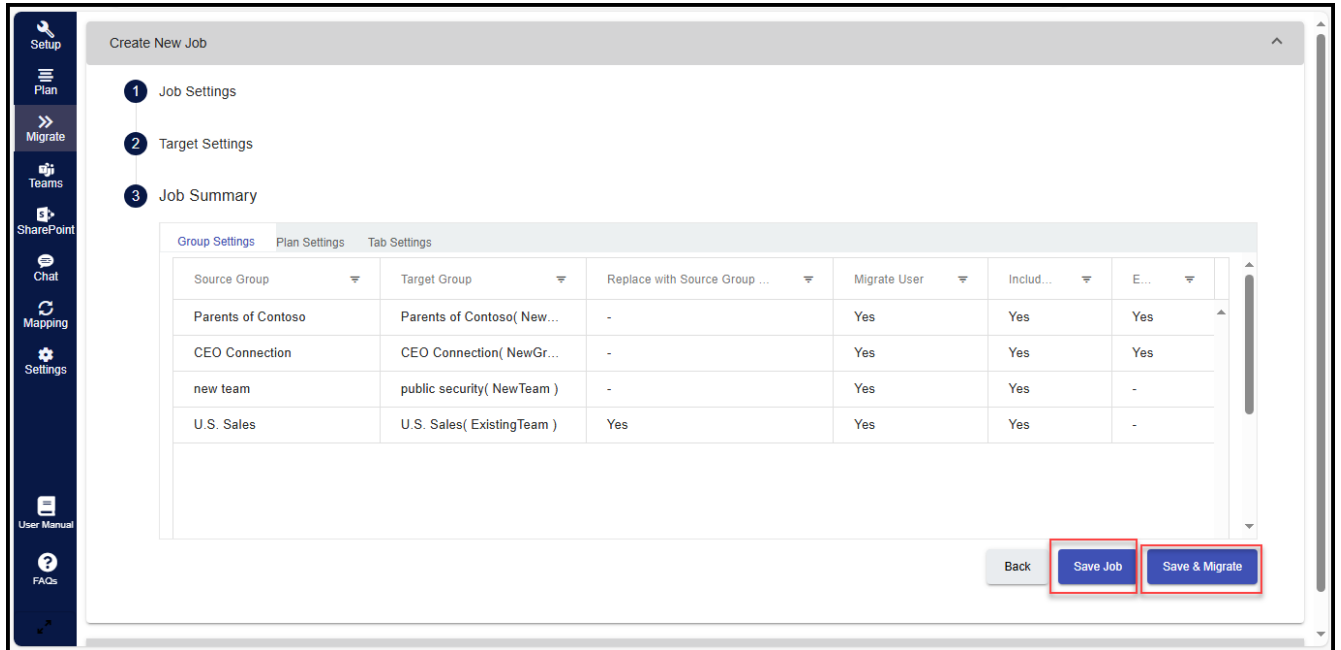
Here you can choose the target channel & name of the target tab to add the migrating plan.



Step 5 : Job Summary

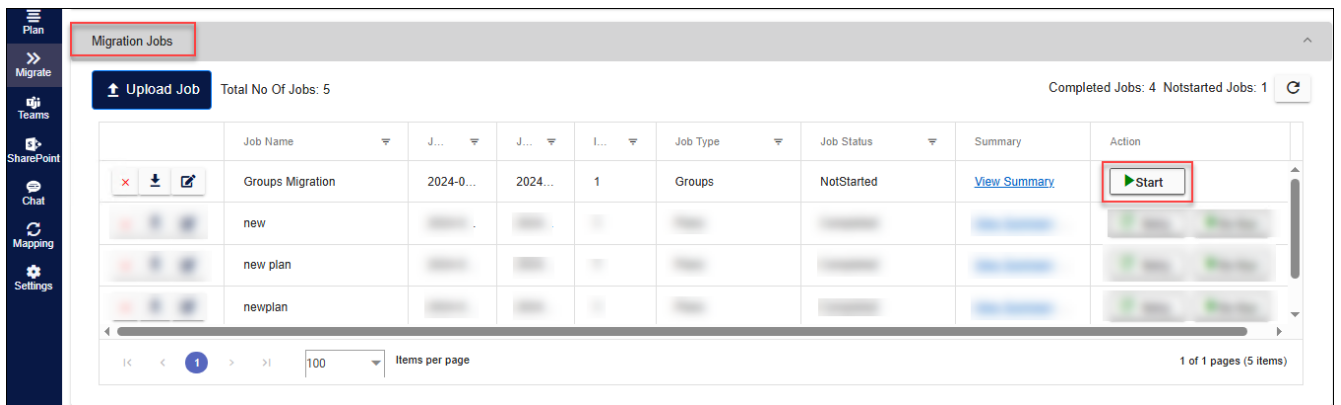
In this step, you can view the summary of job. After checking the summary, you can select one of the following two options.

- Save Job -> It saves the current job, then you can run later by clicking Start button from Migration Jobs grid.
- Save & Migrate Job -> It saves the current job and starts the migration process immediately.



Execute Saved Jobs

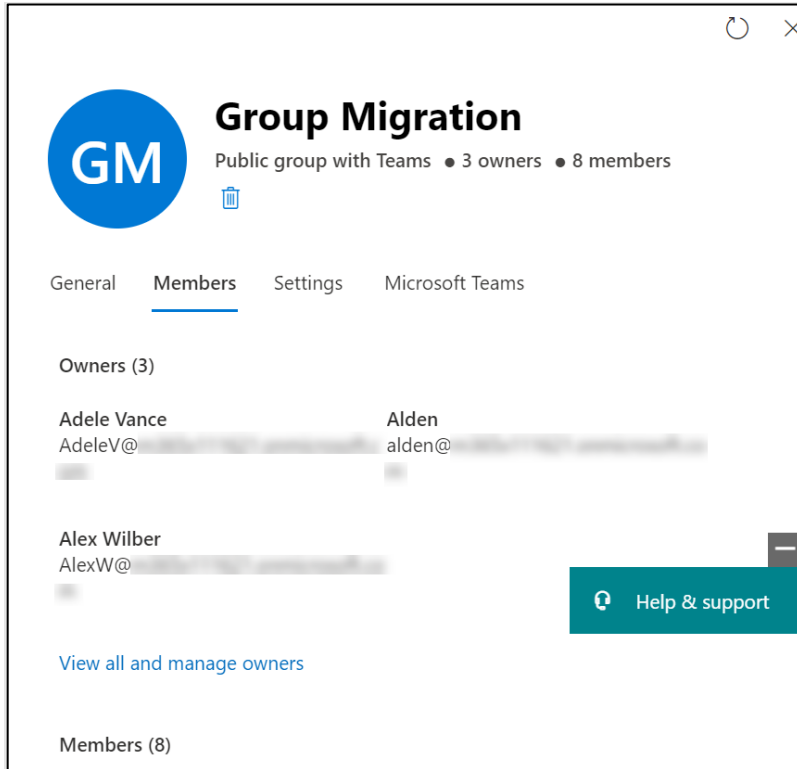
Under Migration Jobs tab – the list of Jobs and their summary are listed. You can opt to run the previously saved jobs as below.



User Experience

Group Settings

Source



Group Migration
Public group with Teams • 3 owners • 8 members

General **Members** Settings Microsoft Teams

Owners (3)

Adele Vance
AdeleV@ [redacted]

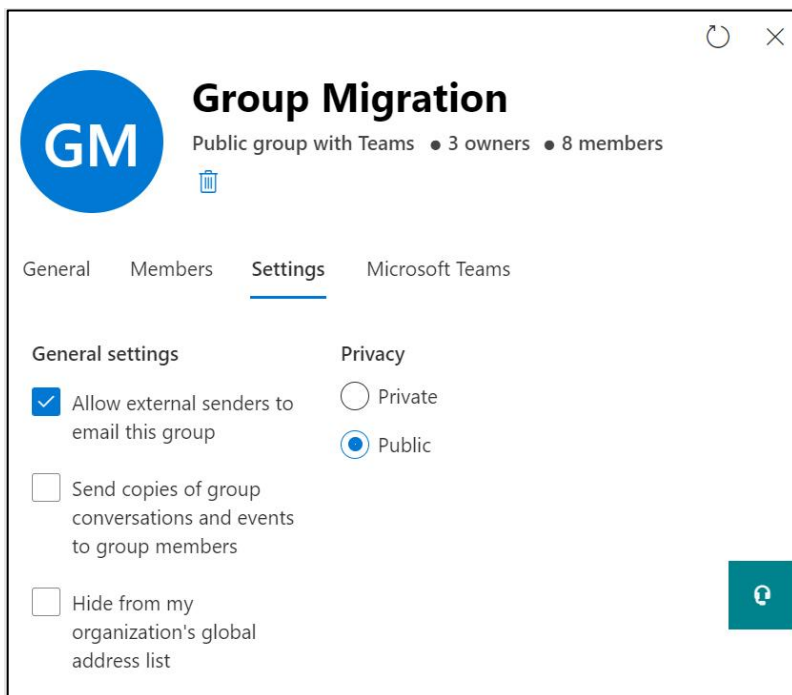
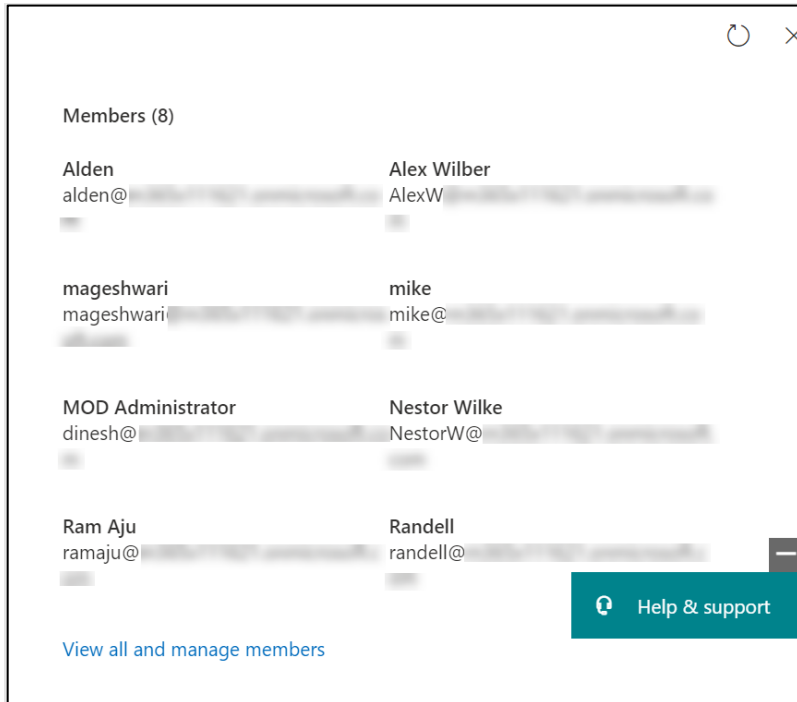
Alex Wilber
AlexW@ [redacted]

Alden
alden@ [redacted]

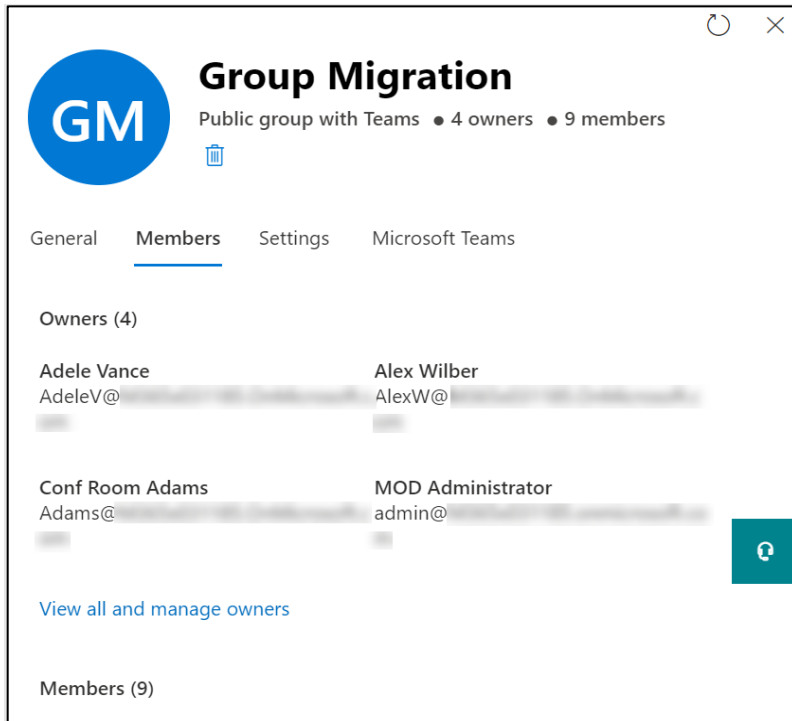
[View all and manage owners](#)

Members (8)

Help & support



Target



Group Migration
Public group with Teams • 4 owners • 9 members

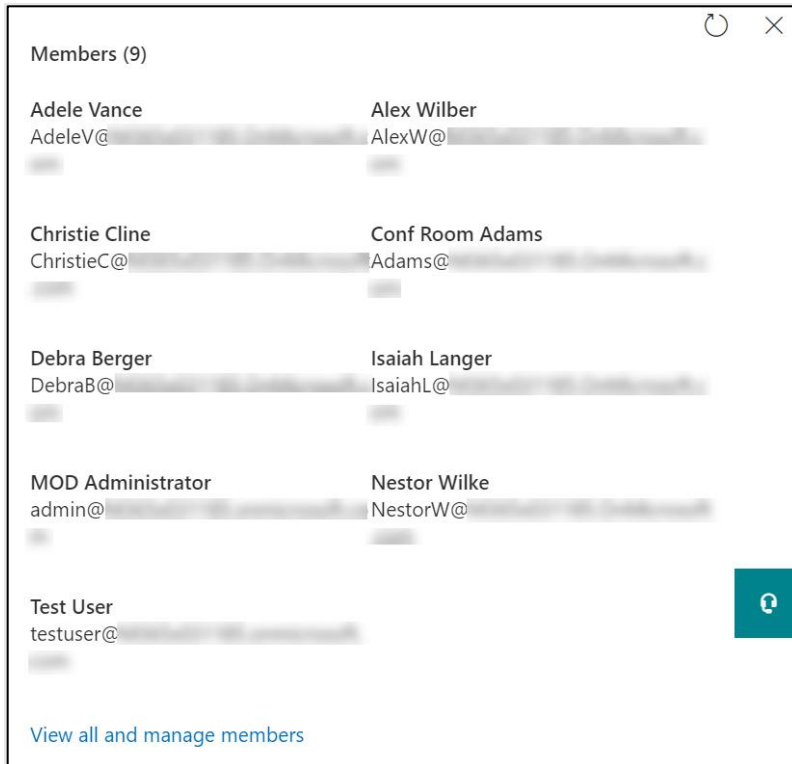
General **Members** Settings Microsoft Teams

Owners (4)

Adele Vance AdeleV@	Alex Wilber AlexW@
Conf Room Adams Adams@	MOD Administrator admin@

[View all and manage owners](#)

Members (9)

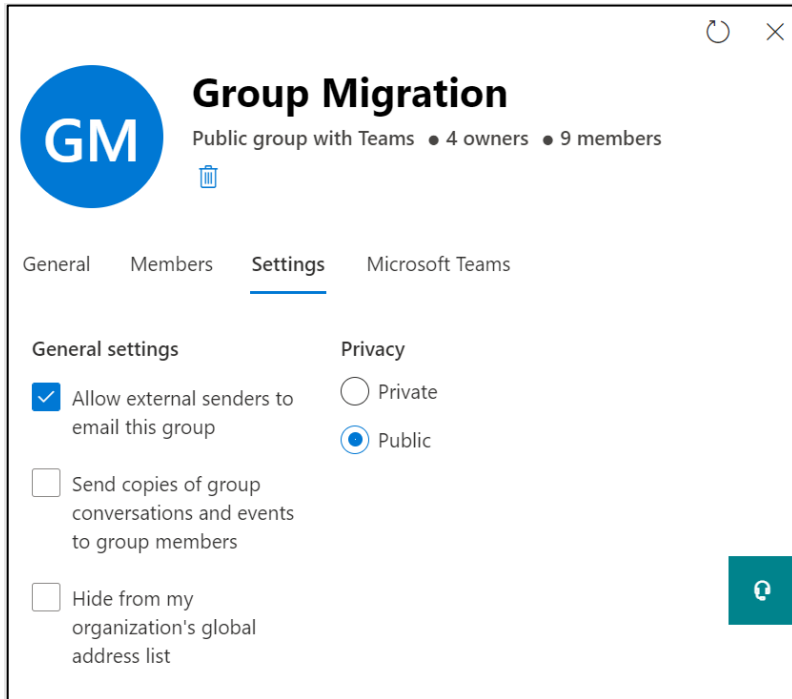


Members (9)

Adele Vance AdeleV@	Alex Wilber AlexW@
Christie Cline ChristieC@	Conf Room Adams Adams@
Debra Berger DebraB@	Isaiah Langer IsaiahL@
MOD Administrator admin@	Nestor Wilke NestorW@
Test User testuser@	

[View all and manage members](#)

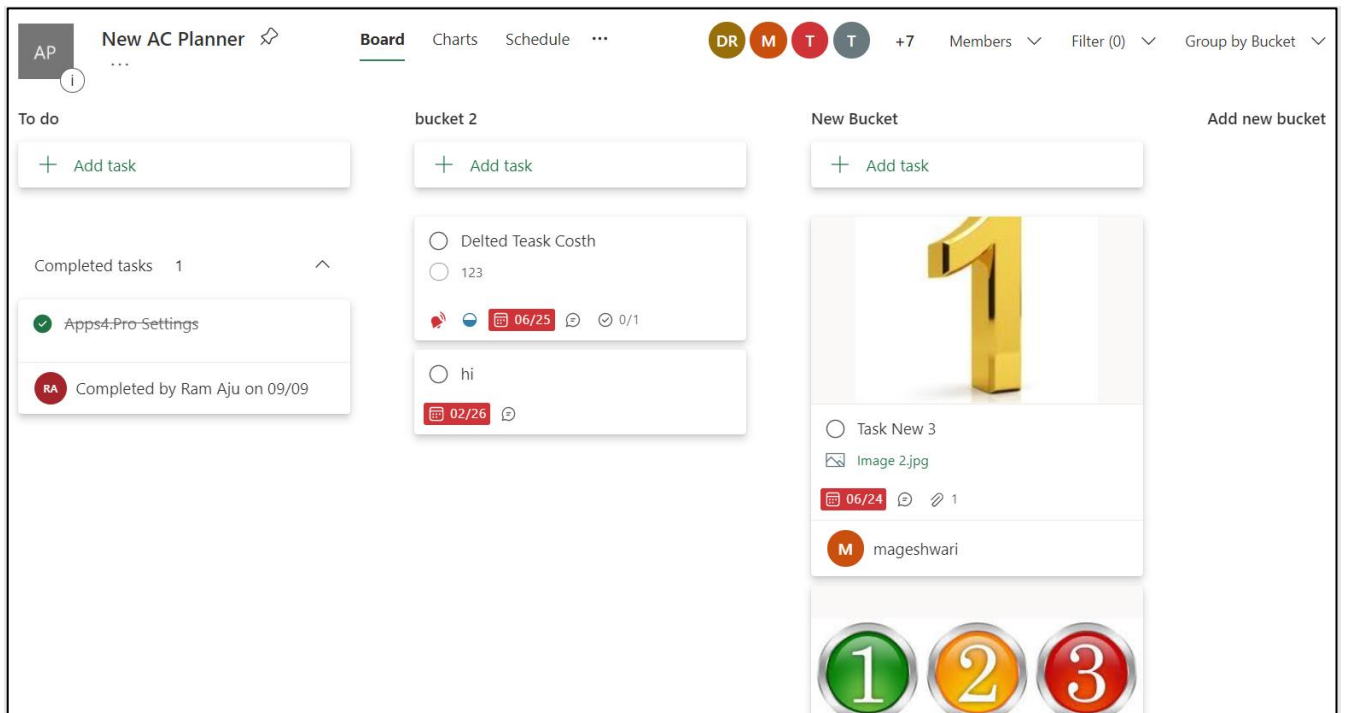
Please note that the Service account also gets added as owner & member to the migrated group in target.



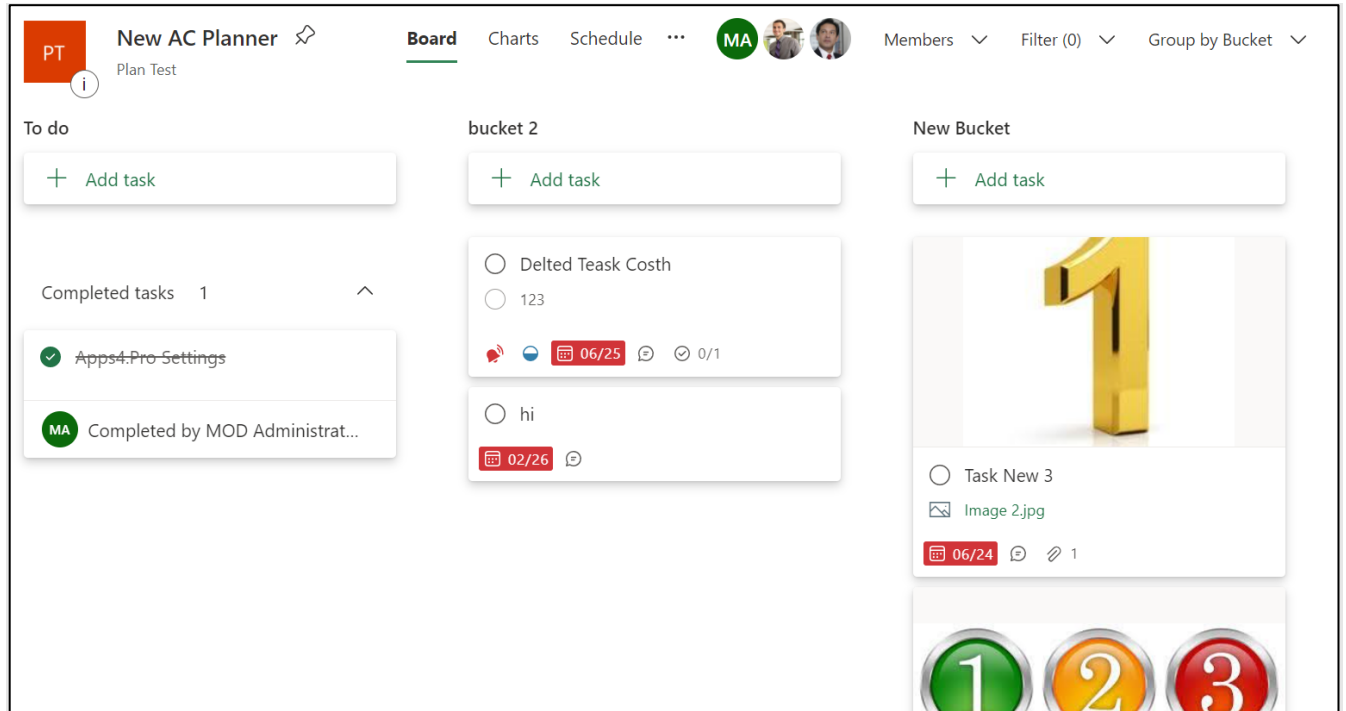
Impact

Plan Migration

Source



Target



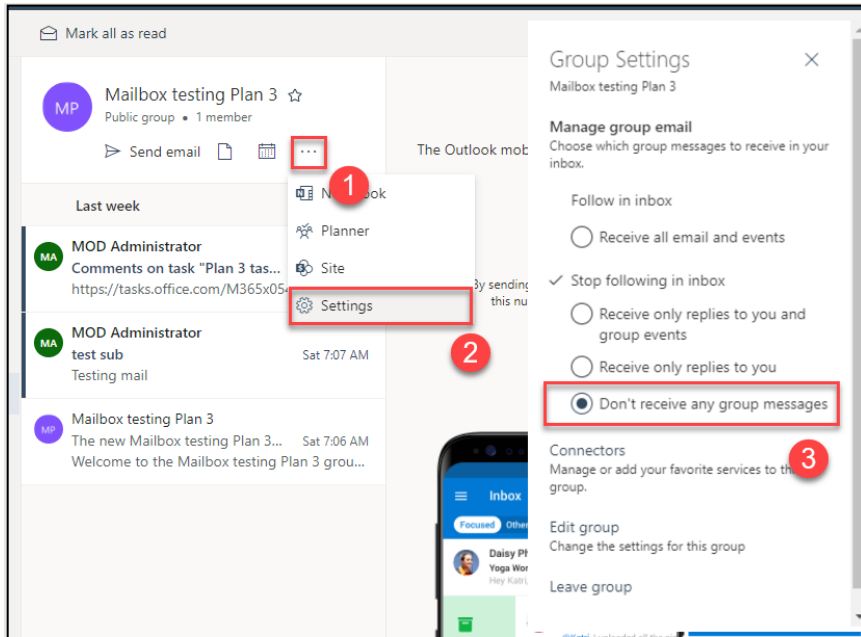
Email Notification

End user will get a notification when migrating the below stated items.

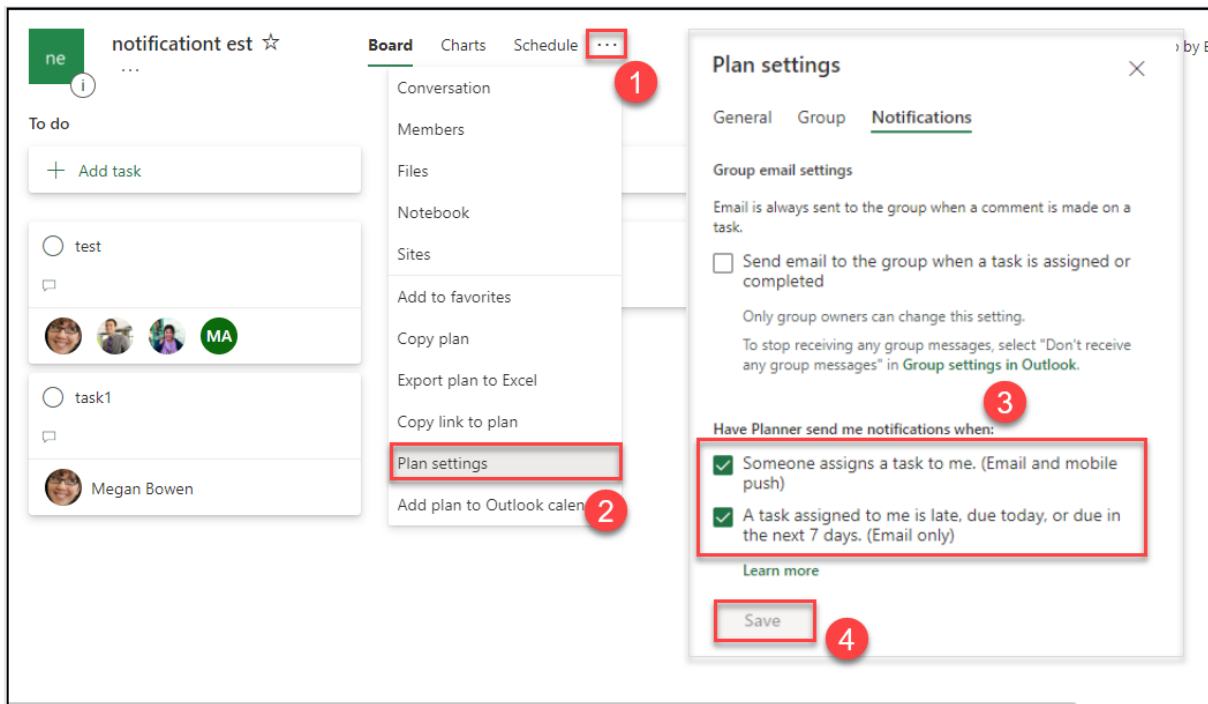
- Comments
- Task Assignments

To avoid the notification problem when trying migration with **Existing group/plan**, each end user needs to enable the below settings.

Open the Respective Plans Office 365 group which we are going to migrate in the outlook, then click on settings → Select **Don't receive any group messages**.



Then Go to the Existing plan in the target tenant → Click on more option (...) → Plan Settings → Unselect both settings under “Have Planner send me notifications when”.



Note: We can't avoid these notifications, when trying the plans migration with **new group/plan** through Apps4.Pro tool.