

M365 Pre-Migration Checklist

Before migrating into the AMC M365 environment, there are preparation steps you can complete to make it as seamless as possible.

For your M365 apps, the migration process is like getting a new computer. Your content is there, but your personalized settings are mostly gone and need to be redone. The checklist is a tool to help you prepare and to remind you of what items should be captured in order to make the post-migration personalization process go as smoothly as possible.

You may not be using some of the M365 applications so only need review the topics that apply to you.

1. Communication & Awareness

- Read all migration-related emails or announcements, noting important dates.
- This migration only impacts Microsoft 365 related tools, including mobile device access.

2. Email & Outlook

- Outlook Rules*: Document or [export Outlook rules](#) (Outlook Classic only).
- Quick Steps*: Document your quick steps.
- Shared Mailboxes*: Make note of these to verify they are all there after the migration.
- Signatures*: Document these so they can easily be recreated.
- Shared Calendars*: Document the shared calendars you use.
- Email "To" History*: The "To" field history is cleared as a part of the migration.
- Meetings (awareness)*: Any meeting you created that contains a Microsoft Teams meeting will be cancelled and rescheduled during the migration. You will have to accept the new meeting invites.
- Archives*: Archives will be migrated after the general migration, so expect them to be available towards the end of the week.

3. OneDrive & SharePoint Files

- Files*: During the **three weeks before your migration date**, normal day-to-day file use for your work is fine.
 - Avoid making significant changes to files during this time, such as moving or deleting large numbers of files or folders.
 - Do not** take this time to do a file cleanup and reorganization.
 - File syncing may not be completed by Monday morning after migration.
 - If you have critical files you are working on that you will need Monday, you may want to save a copy into your Downloads folder so you will be able to access it if the sync has not completed.
- SharePoint Sites*: Your favorited and recent site settings will not come over. Go to <https://umhealth.sharepoint.com/>, sign in, open the SharePoint app, and take screenshots/document your recent/favorited sites.
- SharePoint Browser Favorites*: If you have browser favorites for SharePoint sites, those will come over, but you will have to modify them to point to the new SharePoint site address.

- Shared File links* (awareness): File share links between West to West or Sparrow to Sparrow should still work after the migration. File share links between West and Sparrow will break.

4. Microsoft Teams

- Chats and Files*: Chats and the files shared in individual, group, and channel chats will be migrated.
 - Post-migration, these chats will not be in Teams, but in searchable HTML files in your OneDrive.
 - It may take an extended period to complete the chat migration.
 - One year of personal chat history will be migrated.
- Individual Settings*: Take screenshots or notes of individual settings (e.g. notifications, layout, etc.)
- Team Owners*: Document key Teams settings, tabs, or custom apps. These items will not be migrated.
- Meeting Notes*: [Copy any meeting notes](#) you want to keep as they will not be migrated. Meeting transcripts can only be downloaded by the meeting creator.
- Meetings in Channels*: Document any existing channel meetings as they will be deleted and then you'll need to recreate them after the migration.
- Teams containing both West and Sparrow members*: The Team will migrate when the environment (Sparrow or West) it was created in is migrated. For West Teams with Sparrow members, the Sparrow members will be added after the Sparrow migration is completed.
- Shared Channels*: Shared channels are migrating with the Team.

6. Intune / MDM

- This application allows you to access M365 from your mobile device. If you want to use your mobile device, *you will complete this post-migration setup using the Intune Company Portal app on your mobile device.*

7. OneNote

- Your OneNote notebooks will be included in the migration.

During the Migration

Migration Start Dates

Friday, **3/20**

Starting at **5 pm on your migration start date**, avoid logging in to your Microsoft account or using any M365 applications. Your files are being migrated to the AMC environment and accessing them may cause issues with file integrity. During some of this time there will be an email outage while your email is being synced into the AMC environment.