

Pilot: M365 Pre- and Post- Migration Checklist

Thank you for participating in the pilot. This will allow us to gather valuable information to make the experience as smooth as possible for your colleagues during the general migration. There are items in this checklist that you will want to be aware of for the pilot, and others that will not directly impact you until the general migration.

- Topics in **red are pilot** related.
- If only part of the items in a red topic will impact you during the pilot, they have been called out in a **Pilot subtopic**.
- The topics in blue and the black General Migration subtopics are those that don't directly impact you during the pilot, but ones you'll definitely want to revisit leading up to and after the general migration.

Pre-Migration

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.

3. OneDrive & SharePoint

- OneDrive*: Your OneDrive files will be moved into the AMC environment. After the migration, your OneDrive files in the West and Sparrow environments will become read-only.

- Your files will need to be resynced/downloaded after you sign-in to OneDrive, so it may take some time before they are all available through the desktop application.
- 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.
- Shared File links (awareness):* Because you are moving into the AMC environment, you will become an external user relative to West and Sparrow. Any file share links shared with you, or by you, will need to be reshared.
- SharePoint:* Your SharePoint sites **are not** moving with the pilot.

4. Microsoft Teams

Pilot

- Your Teams:* You will start with a fresh MS Teams account, meaning you will not be a member of any Teams or have any chat in the new environment. **Your West and Sparrow Teams will come over with the general migration.**
- Accessing Teams:* During the pilot you will access your Teams by logging into Teams online using your @umhwest.org or @umhsparrow.org credentials.
- Individual Settings:* Take screenshots or notes of individual settings (e.g. notifications, layout, etc.)

For the General Migration

- 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 (mobile device management)

- This application allows you to access M365 from your mobile device. If you want to use your mobile device, **you will complete this setup post-migration.**

Pilot considerations:

- If you want to access Outlook and OneDrive on your mobile device, you will need to create an Intune profile for the AMC environment.
- If you want to access Teams and other M365 applications (except Outlook and OneDrive) from your West/Sparrow account, you will not change your Intune setup until after the general migration occurs.

7. OneNote

- Your OneNote notebooks will be included in the migration.

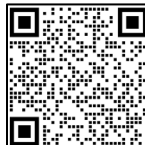
8. Microsoft Authenticator

- You will need Microsoft Authenticator when you log in to the AMC environment for the first time. You can download it to your mobile device before migration, or you will be asked to do it when you first log in post-migration. Get the mobile app here:

[Android](#)



[iPhone](#)



During Migration

Starting at **5 pm on Tuesday, 2/24**, 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.

Post-Migration

After you have migrated into the UofM Health M365 environment, you will need to take some steps to verify everything is working correctly as well as reconfigure some of your settings that did not migrate over.

You must complete the Wednesday Morning tasks in order to configure and sign in to your desktop/computer M365 applications, so they are connected to the AMC environment.

If you encounter an error during the Wednesday morning process,

- Submit a ticket to the Service Desk and they will assist you in the process.

Until the general migration occurs, you will use your desktop applications in the AMC environment (@uofmhealth.org account) for accessing email.

To access your West or Sparrow M365 resources you will use the online applications and your West/Sparrow credentials.

- Outlook (OWA): <https://outlook.office.com/>
- Teams: <http://teams.microsoft.com/>
- OneDrive: West - <https://metrohealthgr-my.sharepoint.com/>
Sparrow – <https://sparrowhealth-my.sharepoint.com/>
- SharePoint: West - <https://metrohealthgr.sharepoint.com/>
Sparrow - <https://sparrowhealth.sharepoint.com/>

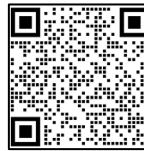
1. Wednesday Morning

- Step 1:* If you haven't already done so, download Microsoft Authenticator. You will also be prompted to do this during the first time you log in to M365. Get the mobile app here:

[Android](#)



[iPhone](#)



- Step 2:* Follow the **post-migration configuration instructions** you were prompted to download or print that were sent in the pre-migration communications. They can also be found in the Mich Med Migration folder on your desktop.



Did you complete the M365 **post-migration configuration instructions** as indicated in Step 2 above? If not, stop and complete Step 2 above. If yes, then continue.

2. Email & Outlook

During the pilot you will only use your email in the AMC environment. *Your email account at West or Sparrow will no longer be directly accessible*, but any messages you receive at that address will be forwarded to your @uofmhealth.org email address.

- Open Outlook:* Verify your email, folders, and calendar events are there.
- Email Folders:* Some of your folders may be empty. *It will take some time to download all your email.* If you need them immediately, you can use [Outlook online](#).
- Meetings:* Any meeting you have created that contains a Microsoft Teams meeting will be cancelled and rescheduled during the migration. You will have to accept the new meeting invites.
- Setup:* Recreate any [Outlook rules](#), [signatures](#), or [Quick Steps](#) if they didn't migrate over. For your signature, if it contains your email, be sure to use your new @uofmhealth.org email address.
- Shared Mailboxes:* Verify they are all there. If you do not see one of your shared mailboxes, follow these instructions to [re-add a shared mailbox](#). If you cannot add it, submit a ticket.
- Mobile Devices:* Re-add your email account on mobile devices, if needed. (Refer to the Intune/MDM section below.)

3. OneDrive

- Open OneDrive:* Confirm your OneDrive files are present, accessible, and syncing. To verify they are syncing, the AutoSave will be on in an open document.
- Sharing Links:* If you have any files you are actively working on that were shared, they will need to be reshared as you are now an external user relative to Sparrow and West.
 - To see all the files you have shared, you can access your [OneDrive files directly in Teams](#) and open the Shared topic, or you can go to OneDrive online at <https://umhealth-my.sharepoint.com/>.
 - File links shared West to West or Sparrow to Sparrow will still work after the migration.

4. Microsoft Teams

Many Teams contained members from both Sparrow and West. Teams created at West will move with West and only have West members, and those created at Sparrow will move with Sparrow. Once both Sparrow and West are migrated, the remaining Team members will be added.

Pilot

- Your Teams:* You will start with a fresh MS Teams account, meaning you will not be a member of any Teams or have any chat in the new environment. **Your West or Sparrow Teams will come over with the general migration.**
- Accessing Sparrow/West Teams:* During the pilot you will access your Teams by logging into Teams online using your @umhwest.org or @umhsparrow.org credentials.
- Personal Settings:* Adjust your personal settings (notifications, look and feel, etc.).
- Any new team created in the AMC environment will have a suffix of .mm.

For the General Migration

- Open Teams:* Verify access to all your teams. If you are missing a team, contact the team owner to add you.
- Personal Chats:* Your 1:1 and group chats are not in Teams but have been migrated over as HTML documents in your OneDrive in a folder called **Migrated Teams Chats**. You can use the OneDrive Search bar to find specific chats.
- All Chats:* Both personal and channel chats have a 1-year retention period, after which they will be deleted. Files in chats will not be deleted.
- Channel Chats:* All channel chats were migrated over. This reset their creation date, so after 1-year, these will all be deleted in accordance with the 1-year retention policy.
- Teams Owners:* Re-pin important apps, tabs, or files in Teams.
- Teams Names:* Migrated Teams have a suffix appended to their name. West = .umhw. Sparrow = .umhsp. Any new Team created in the AMC environment will have a suffix of .mm.

5. SharePoint

- Your Sites:* Your SharePoint sites were not migrated as a part of the pilot.

6. Intune / MDM (mobile device management)

To access your email and other M365 resources on your mobile devices you will need to install Intune/MDM on those devices first.

Instructions to set up Intune Company Portal.

[Android](#)

[iPhone](#)

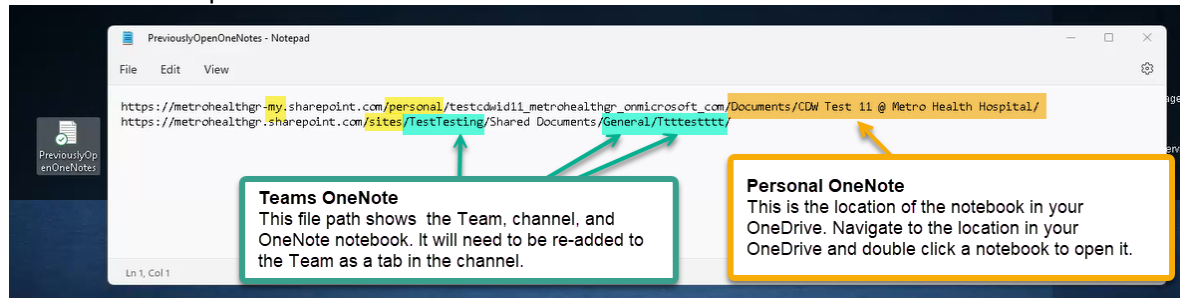
You can only have one Intune profile on your mobile device.

- If you want to access Outlook and OneDrive on your mobile device, you will need to create an Intune profile for the AMC environment.
- If you want to access Teams and other M365 applications (except Outlook and OneDrive) from your West/Sparrow account, you will not change your Intune setup until after the general migration occurs.

7. OneNote

OneNote notebooks are not automatically loaded after the migration. You will have to add them back to your OneNote desktop app using one of the methods below.

- Log in to OneNote online
 - a. Login to OneNote online (<https://onenote.cloud.microsoft/>) with your **@uofmhealth.org** credentials.
 - b. Hover over a notebook in the list and click the ellipsis (...).
 - c. Hover over Open.
 - d. Select Open in OneNote.
 - e. This opens and adds the notebook to your OneNote desktop app. Repeat for all notebooks.
- Use the text file on your desktop called *PreviouslyOpenOneNotes*.
 - a. Login During the day of migration configuration process, the PreviouslyOpenOneNotes file containing file paths to all your OneNote notebooks, for both personal and Teams, is added to your OneDrive desktop.



- a. Personal OneDrive location contains <https://uofmhealth-my.sharepoint.com/personal/>
 - b. Teams OneDrive location contains <https://metrohealthgr-sharepoint.com/sites/>
 - b. For your Personal OneNote notebooks, navigate to the location in your OneDrive as indicated by the file path and open the notebook file with the .one file type.
 - c. For the Teams OneNote notebooks, those will need to be added back to the channel as a tab.
- In OneDrive, navigate to *Documents > OneNote Notebooks*. Then open the files for the notebooks you want. They should have a .one file extension.
- You can [pin OneNote in Teams](#).

8. Other Apps & Services

- Check access to other Microsoft 365 apps you use.
- Planner (<https://planner.cloud.microsoft/>). You can [view your Plans in Teams](#).
- Forms (<https://forms.cloud.microsoft/>)
- Reinstall or reconnect any third-party apps or add-ins if needed.
- Submit a ticket if you notice any missing data, access issues, or unexpected behavior. Be sure to provide screenshots or error messages to help resolve issues faster.

Be sure to download the checklist that is sent out to non-pilot users as well. It contains some other items you will want to be aware of.