

AppHelp Microsoft 365 Migration

Top 5 Reasons to Outsource your Microsoft 365 Email Migration

The transition to the cloud is not one to be taken lightly- migrations can be complex both technically and logistically. Here are the top 5 reasons why outsourcing your project to migration experts may be the safest and most efficient way to get your company's email to the cloud.

1. Access Migration Experts

Transitioning a business from a server-based infrastructure to a cloud environment is a major undertaking that requires access to both the necessary technical tools and the expertise to use those tools properly. Many businesses think that they can save money by making the move themselves. However, the tools and training needed to perform the migration properly add extra steps that can be costly and time consuming, and keep your team from working on core business objectives.

By partnering with AppHelp, your migration will be handled by certified migration experts that take extra care to keep your important business data safe and secure along the way.

2. Custom Migration Plan

Successful migrations require planning and preparation, and comprehensively covering the whole migration process can be a challenge. As a small business it's important to be prepared with the right information and understand how the process will impact your operations.

AppHelp takes care of all the complexities by creating a custom email migration plan specifically for your business. Our migration experts will review your completed Premigration form to assess your business' needs and evaluate your current environment to create a custom migration plan tailored to you.

3. Robust and Secure

InfoWorld reports that many users who choose to migrate to Microsoft 365 in-house have "come back from their migration path battle-worn by a slew of unexpected perils they encountered along the way". These unexpected pitfalls can not only be frustrating but also extremely costly by leaving your data vulnerable to migration errors and

SUPPORT FEATURES

- Custom Migration Plan
- Mailbox, contacts & calendar migration
- Scheduled DNS change
- Desktop Configuration
- 24/7 remote support
- Admin Tutorial & Reference Material

"The migration team member was helpful, knowledgeable, patient and kind. I was nervous about the migration but I gained confidence from working with [them] that the migration will be done right."

-AppHelp Migration Customer



breaches.

AppHelp experts work to preserve the integrity and security of your data at all times by combining best-in-class migration technology with operational best practices. AppHelp's Microsoft Certified migration experts ensure your business data is safe on its way to the cloud. Plus, they will provide your team with tips for safe password resets and other best practices to ensure maximum security in the future.

4. 100% Uptime with Regular Status Updates

When done incorrectly, the migration process can cause interruptions to your business and leave your team with no access to their emails or critical customer info.

AppHelp experts will work in the background making sure all the environments across your system are synchronized to ensure the continuous operation of your organization. Our agents will work remotely, making the migration seemingly invisible to your team, while still sending your appointed administrator regular status updates so that you can go about your day worry-free.

5. Post-Migration: Admin Tutorial, Install & Setup and 24/7 Support

Once the technical part of the migration is complete, if your business isn't properly setup in Microsoft 365, it can result in low efficiency and adoption, meaning the overall transition has not achieved the benefits you originally sought from your Microsoft 365 solution. Each migration is followed by a remote training session with your company's admin to cover all the basics, from creating users and assigning licenses through the marketplace to a quick overview of Outlook or OneDrive.

With our Install & Setup solution, AppHelp will ensure your team is prepped and ready to use Microsoft 365 to its full potential so you can start seeing immediate value from your investment. And when things go wrong, AppHelp experts will be there 24/7/365 to help with technical troubleshooting of Microsoft 365 so you can get back to running your business.

ABOUT APPHELP

AppHelp 'helps' businesses be more successful with their adoption and use of the latest in technology and cloud services. We ensure customers have the support they need to find, buy and use technology and software, giving businesses an easy and affordable way to address SaaS and IT needs, without having to own IT staff.

AppHelp Microsoft 365 Migration FAQs

1. Will I be able to communicate via email with clients and my team during the migration?

Yes, you will be able to send and receive emails throughout the migration process. The migration will occur as you work.



2. What exactly will be migrated?

It will depend on the email server. The most common items that will be migrated include; emails, public folders, tasks and calendars.

3. What should I expect from my migration to Microsoft 365?

- › Expect to receive a premigration form to fill out with information regarding your source environment. This form will help our migration experts plan your migration to the cloud. If you come across any questions or concerns while filling out the form, no worries! A migration expert will be available to assist you by phone or chat.
- › Next, we'll help you choose the ideal time for the procedure and begin the migration.
- › You and your colleagues will receive alerts and updates via email for steps that must be completed throughout the migration (it's important that all members of your business follow the instructions or the migration may be delayed).
- › Every migration to Microsoft 365 is followed by a tutorial with your company's point of contact to show them how to create users and assign licenses through the Marketplace, plus a chance to ask questions and request reference materials!

4. Can I access my email during the migration?

Yes, you can access your emails during the migration. However, you should not modify the folders in your account or change your password.

5. How long will the migration take?

The duration depends on several factors including the number of accounts, the amount of data and the network connection.

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SCOPE OF SUPPORT

Microsoft 365 Migration



This document provides comprehensive scope of support for AppHelp's Microsoft 365 Migration service offering

PRODUCT DESCRIPTION

Geared towards a company's point of contact (POC), this one-time session from AppHelp takes all the complexities out of setting up a Microsoft 365 tenant, migrating domains, and moving mail from a customer's source email environment. This service includes migration planning, email data migration, domain change management as well as an Admin-level tutorial.

Combining the industry's leading email migration technologies, skilled Microsoft 365 specialists and user-friendly processes, customers will benefit from a seamless and zero downtime migration.

SCOPE OF SUPPORT

PRE-MIGRATION TASKS

- > Inbound support, as required, to assist the company's POC with completing the Migration form to define migration requirements:
 - Confirm mailbox size and number of mail items
 - Identify mailbox type (e.g., IMAP), number of mailboxes (seats) and services
 - Identify source environment and any infrastructure requirements

MIGRATION TASKS

- > Kickoff session to complete migration form and confirm requirements
- > Confirm sufficient license assignments
- > Discovery: source system, registrar, DNS service, mailboxes, and public folders
- > Confirm mailboxes, shared mailboxes, and public folders identified for migration
- > Installation of Outlook Assistant tool to enable automatic configuration of Outlook
- > Where possible: form emailed to all end users to collect login credentials
- > Migrate mailbox data and back-end monitoring
- > Recreate Exchange rules from old server
- > Recreate any distribution groups and/or public folders
- > Update DNS records for Microsoft 365

POST-MIGRATION TASKS

- > Perform post-migration service testing and confirm migration success with POC
- > Automatic configuration of Outlook is available for all users who have Outlook 2010+ with Outlook Assistant installed

- > Reference material with details on where to download desktop software shared for end users (if applicable, based on Microsoft 365 edition)
- > Admin tutorial for the point of contact where reference material is provided. Content covered includes an overview of the Marketplace and how to add licenses for new users and a brief Q&A where other topics may be addressed (e.g., how to migrate PST files).

See **Exhibit A** for sample migration flow.

EXHIBIT A: SAMPLE MIGRATION FLOW

	Description / Purpose following a successful sale
1	Microsoft 365 tenant created *
2	Domain added to the Marketplace *
3	Users created in the Marketplace *
4	Licenses assigned in the Marketplace *
5	Domain configuration confirmed
6	Migration form submitted by POC to confirm requirements - users, licenses, distribution groups, domain, Outlook configuration, email migration, DNS verification and access, problem resolution (i.e., permissions) **
7	Consultation scheduled and booking information confirmed **
8	Text record added to hosting service and Microsoft portal (if applicable)
9	Project initiated and cutover date set
10	Automated communication emails sent to POC and / or end users
11	Project is continuously reviewed to ensure plan is executing correctly
12	Cutover date reminder emailed to POC
13	Confirm receipt and acceptance
14	Cutover date rescheduled, if required
15	DNS and migration cutover performed
16	Completion of migration sync confirmed
17	Validate successful migration by testing
18	Project completion confirmation
19	Admin tutorial
20	Final email to confirm migration completion along with instructions for support within the 15-day warranty period and where to obtain support after the warranty period

* This step is not currently completed by AppHelp.

** This step may be completed with the assistance of an AppHelp agent, as needed.

REQUIREMENTS / ASSUMPTIONS

- > All users must have an active Microsoft 365 subscription purchased from a Partner’s Marketplace
- > One POC per migration
- > POC will have access to all technology required for the project, including, but not limited to:
 - Administrator access to source server(s)
 - Administrator access to M365 destination
 - Network
 - Desktops

- Third-Party hardware/software that may impact the project
- Public DNS provider
- All necessary facilities, hardware, and software
- > POC must grant source access to all mailboxes to perform the migration
- > POC will provide timely responses to questions and requests
- > The migration can only be scheduled and delivered after the POC completes and submits the Migration form
- > Company has reliable topology, bandwidth, and services in place, as it pertains to the project
- > Changes will not be made to the source environment prior to the migration date. This includes changing passwords, mailboxes, distribution groups, shared mailboxes, aliases, public folders, admin users, domains, emails addresses, policies, etc. As this may interfere with the migration process.
- > The source email environment will remain available for a minimum of 72 hours, or until all users have been migrated
- > The public facing DNS record for email will remain in place for 72 hours to allow data sweep syncs to run
- > Email forwarding will not be enabled from the source environment to avoid the creation of duplicate items
- > All users' systems must be up to date with the latest software to have their mailbox migrated
- > All users must be using Exchange 2003 Online or above to perform the migration
- > All users must be using Outlook 2010 or above for the best migration experience, as older versions have reduced functionality with Microsoft 365
- > All users must be using one of the supported operating systems for the following versions of Outlook:
 - Outlook 2016
 - Windows 7 or later
 - Mac OS X 10.10 or later
 - Outlook 2011
 - Windows 7 or later
 - Mac OS X 10.5.8 or later

EXCLUSIONS

DATA SOURCE

- > Data stored locally on Macs and/or PCs (e.g.: PST and archive files are out of scope and cannot be migrated). Mailboxes larger than 20GB in size. Reference material may be provided upon request to help the point of contact with this task.
- > Other data migration (e.g.: data migrations from G Drive to OneDrive are out of scope)
- > All source environments other than M365, Google Workspace, Exchange, IMAP and POP3 are not supported. For POP3: locally stored data is not supported. Unsupported environments and configurations include:
 - Third-party webmail (e.g., Yahoo), Lotus Notes

- SyncML
- Third-party applications that customize the MAPI properties of Outlook items or add additional, proprietary properties
- Migrating within a hybrid environment
- POP3 migrations and migration of non-mail data for IMAP migrations when the user's source mailbox is not set to an English locale or region
- Environments that are not publicly accessible over the internet (e.g., a server that requires connection through a VPN tunnel)
- Microsoft 365 tenants with Multi-Geo capabilities enabled
- Microsoft 365 US Government tenants (GCC, GCC High, DoD)

CUSTOMER ENVIRONMENT

- > Updates to the customer's source operating system or version of Microsoft Outlook
- > Updates to servers (e.g., Exchange, Active Directory...) and virtual machines including auto-discovery settings. (For Active Directory password synchronization, AppHelp makes an optional add-on product available.)
- > Troubleshooting connectivity, firewall and/or internet issues
- > Other custom settings and/or customizations (other than default setting) in the Exchange Admin Centre will not be recreated in Microsoft 365 (e.g., protection settings, permission settings, mobile setting, public folder settings, etc.). Reference material may be provided upon request to help the point of contact with these settings.
- > All other custom settings and / or customizations (e.g., group policies and permissions, distribution group settings, resource room settings, recurring meeting exceptions, contact groups, mail-flow rules, Quick Steps) will not be carried over

MICROSOFT OUTLOOK

- > Manual installation, patching and supporting of the Outlook client. For eligible users (i.e., those with Outlook 2010+ installed), installation/ updates to the Outlook application will be done automatically.
- > Recreation of local Outlook rules and / or creating new rules on Exchange Online. Recreation of server-side rules limited to conditions and actions handled by the Exchange server (e.g., <from addresses in the Global Address List or contacts list> move to <specified folder>. Reference material may be provided upon request to help the point of contact with this task.
- > Locally configured permissions for calendars, contacts, tasks, or mailboxes will not be recreated in Microsoft 365
- > Manual configuration and customization of Outlook for end users

THIRD PARTY SOFTWARE AND DEVICES

- > Non-ActiveSync email applications/devices will not be updated (e.g., network printers, print servers, terminal servers, CRM systems, mass mailing systems such as Mailchimp)
- > Malware and anti-spam solutions will not be updated

- > Configuration of mail software on mobile and secondary devices

OUTLOOK ASSISTANT TOOL UNSUPPORTED SCENARIOS

- > Multi-factor Authentication (MFA) on the destination Office 365 tenant. MFA (e.g., 2FA) will prevent Outlook profiles from being created in Office 365. If possible, delay deployment of MFA or disable it for migrating end users until after the migration is complete.
- > Running two versions of Outlook side-by-side
- > Upgrading Outlook after the Outlook Assistant has been installed
- > Terminal Servers/Services (e.g., VDI, RDP, Citrix, etc.)
- > Third-party applications that customize the MAPI properties of Outlook items or add additional, proprietary properties (e.g., MDAemon)
- > Mobile Devices (e.g., Android, iOS, etc.)
- > Outlook 2003 and 2007. Microsoft 365 does not support Outlook 2003 and 2007. When migrating from these versions of Outlook, the Outlook Assistant provides desktop readiness checks. In the final email, users are given a link to access Microsoft 365 email through Outlook Web Access (OWA). If Outlook 2003 or 2007 is upgraded, the Outlook Assistant will automatically configure the upgraded Outlook to work with Microsoft 365.
- > Macs and Outlook for Macs. In the final end user email, Mac users are provided with instructions to set up Outlook, and access Outlook Web Access (OWA).