

Office 365 Exchange Migration Cutover

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PREPARATION:

1. See other document if Exchange Hybrid Migration is option
 1. [365 Exchange Hybrid Migration](#)
2. MFA
3. Need to get login information for DNS and domains
4. Need to get login information for current email server
5. Work to get Office 365 account created for client
6. Start process to setup method of quick access to computers during cutover. AKA setup GPO for Automate.
7. Get listing of all current email accounts and provide to client to verify no unknown accounts they are unaware that will need to be migrated
8. Work with client to ID all devices where email is generated
 1. Outlook or similar desktop application
 2. Smartphones
 3. LOB applications that email
 4. MFD/Copier/Scanners that scan to email
9. Work with the client to ID all locations where email is generated (for SPF records)
 1. Current Exchange/email server location
 2. Office 365 SPF records
 3. If email is direct generated from LOB what is the public IP
 4. If email is direct generated from scanner/copier what is public IP
 5. If marketing email service is used, what IP need to be included for SPF
10. Link domains to Office 365
11. Increase licensing for Office 365 to appropriate number
12. Add user accounts to Office 365 and license
 1. AD Sync when possible
 2. Manual input when necessary
13. Ask client which personnel they want to have email on phone. Some companies do not want this.

14. Update SPF record to additionally include Office 365 SPF records
15. Review requirements for non-Outlook nor smartphone email processes
16. Create documents for email on phone
17. DNS TTL - Be aware and communicate the length of time it will take for changes
18. Once all is ready work with client to set expectations for process and schedule cutover

1. CUTOVER:

1. Day Before: reduce TTL on all DNS records
2. Day Before: Email all client personnel email on phone setup
3. At designated time confirm with client that we are making change
 1. Client is not to email during this transition. This will reduce missed email during the process
4. Update DNS and wait for TTL to expire. That way any transition email to the old server is captured.
5. Update Internal AD Autodiscover location: [Autodiscover Update](#)
6. Have full listing of users posted and coordinate which techs will address which users
7. Outlook migration
 1. Remote to individual's computer
 2. Ensure all mail is downloaded. Verify it is not just caching recent messages, all message.

Machine generated alternative text: Change Account Server Settings Enter the Microsoft Excl

 3. Export entire mailbox to C:\Accent\PST (Ensure all aspects including contacts, calendar, email)
 4. Duplicate file(s)
 5. Create a new mail profile
 6. Import old email and allow to process
8. LOB/MFD - update per individual specifications

2. Decommission

1. Review what steps will be needed to properly decommission the old system
2. Review and remove newly unused anti-spam and other related services.

Revision #1

Created 23 December 2023 04:34:42 by ColtM

Updated 13 June 2024 01:28:01 by ColtM