M&A Integration Framework for Office 365 Tenant Migrations

The framework and reusable tools you need for successful M&A IT integrations — including not just migration but security, governance, and backup & recovery as well

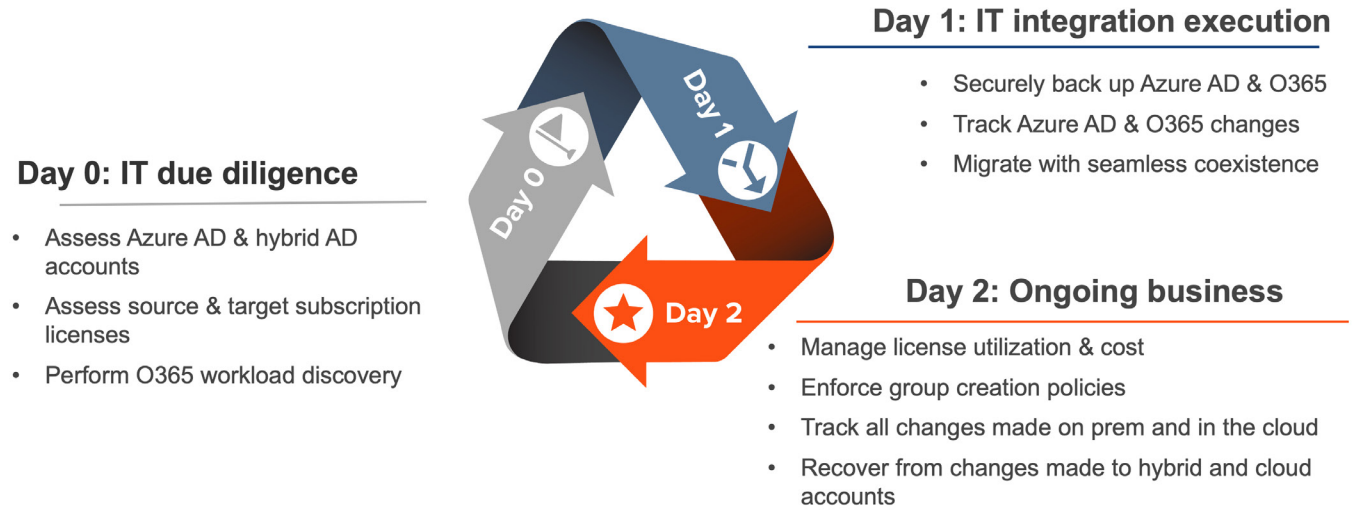

Figure 1. The Quest framework for Office 365 tenant-to-tenant migrations

OVERVIEW

It's common to think of the IT integration effort involved in mergers and acquisitions (M&As) as a one-time technical project: Simply move users and data from one place to another. But with M&A activity on the rise in recent years and so many organizations around the world now using cloud or hybrid environments, IT pros need to be prepared not just for today's IT integration, but tomorrow's as well. Moreover, they need solutions that not only enable a seamless migration, but ensure strong security, proper governance, and reliable backup and recovery across the IT environment, before, during and after each M&A event.

This tech brief presents a proven framework for understanding the phases involved in a tenant-to-tenant migration. We'll walk through each stage of framework and detail reusable solutions that enable you to master the core tasks involved, so you'll be able to not only deliver a successful migration, but efficiently secure and manage the resulting cloud or hybrid IT ecosystem.

The three phases in the framework and the key tasks in each phase are illustrated in Figure 1.

DAY 0: IT DUE DILIGENCE

The first step in any migration is careful planning. While IT teams are often under extreme pressure to get migrations done quickly, especially in high-stakes situations like mergers and acquisitions, taking the time to conduct an in-depth analysis of your source and target tenants will pay off handsomely. By gaining control over your migration and simplifying it as much as possible, you can dramatically reduce not just costs but the risk of missed deadlines and outright IT integration failures.

In an Office 365 tenant-to-tenant migration, IT due diligence includes the following three key tasks:

- Assess your Azure AD and hybrid AD accounts
- Review your source and target subscription licensing
- Perform Office 365 workload discovery

Assess your Azure AD and hybrid AD accounts

The deliverable in a tenant-to-tenant migration is an effective and secure IT ecosystem for the business, so one of the most important components of success is ensuring that you

have exactly the right users, each with exactly the right access permissions. That means a critical task in the due diligence phase is getting a complete and accurate inventory of all the Azure AD and on-prem AD accounts and security groups in all the source and target tenants.

On Demand Migration enables you to scope, plan and manage your tenant-to-tenant migration from a single intuitive dashboard. In particular, you can easily discover all the accounts and groups in your source and target tenants, and assess them to determine exactly which accounts and groups you need to migrate. Moreover, you can spot duplicate users and groups, excessive permissions, and other issues that need to be cleaned up to avoid migration errors, delays and security issues

On Demand Migration enables you to scope, plan and manage your tenant-to-tenant migration from a single intuitive dashboard.

Review your source and target subscription licensing.

Of course, users don't just need the right accounts and permissions; they also need the right Office 365 licenses. Therefore, it's crucial to ensure that you have the right number — and the right types — of licenses on the target to support your migration.

You cannot move licenses from one tenant to another, so before you begin your migration, you need secure the number and types licenses needed to cover the users involved, along with licenses for any additional services and workloads they will require. Failure to do this has stopped several migration efforts dead in their tracks.

On Demand License Management provides the insight you need to ensure users can access the applications and services they need after your migration. You can clearly see how many licenses are available and who are they assigned to, so you won't be caught short and leave users frustrated and unproductive.

Perform workload discovery

The third key task in the IT due diligence phase is to understand the workloads that exist in both the source and target tenants so you can ensure users can continue to do their jobs during and after the migration. On Demand Migration gives you the insight you need into all the critical workloads for your business, including mail and public folders, OneDrive, SharePoint, and Teams:

- **Mail and public folders** — Email remains a vital means of communication and collaboration, both within your workplace and with external entities, including partners and customers. On Demand Migration helps you ensure that users retain access to the email data they need to do their jobs efficiently and effectively. You can understand exactly what content users have in their mailboxes, as well as develop a plan for filtering it by folder, type or date to exclude data that does not need to be migrated. Similarly, the solution enables you to discover and assess the shared email data you have stored in public folders, as well as legacy archived data that you might be need to retain to meet compliance requirements or other needs.
- **OneDrive** — OneDrive is another crucial workload for most organizations today. On Demand Migration enables you to discover and assess the content stored in OneDrive and develop a strategy for migrating it appropriately. In particular, you can assess and preserve user and sharing permissions in order to ensure continued access while maintaining data security, as well as plan how to use filtering to exclude unwanted data. You can also develop a schedule for migration tasks that takes into account the needs of management, the migration team and business users.
- **SharePoint Online** — On Demand Migration also enables you to plan an effective migration of the documents and other valuable data stored in SharePoint. You can discover all your site collections, libraries and lists, and determine how to migrate both classic and modern team sites to your target tenant. As with all the other workloads, you can ensure secure continued access by preserving site and document permissions and metadata. For planning more complex SharePoint migrations, Quest offers Metalogix Essentials for Office 365, which enables you to analyze the content in your current SharePoint against Microsoft guidelines and then use easy-to-read reports to visualize and fix problems before they become roadblocks in your migration.
- **Teams** — Teams is the hub of communication and collaboration in Office 365, and usage has skyrocketed as organizations shifted to a work-from-home model. On Demand Migration enables you to discover all team members and groups, as well as all the valuable data stored in channels, conversations

and documents. You can provision the right Teams and channels in the target to empower users to continue to participate and interact in discussions during and after the migration. You can even plan how you'd like to merge or rename Teams as they are migrated to the target tenant.

DAY 1: IT INTEGRATION

Once IT due diligence is complete, it's time to actually perform the IT integration to ensure mail, calendars, resources and critical applications are connected and working properly. It's essential to securely move content and permissions to the correct locations while maintaining seamless coexistence and user productivity throughout the integration project. The following three key tasks are crucial:

- Back up Azure AD and Office 365
- Track changes to Azure AD and Office 365
- Migrate while ensuring seamless coexistence

Back up Azure AD and Office 365

Before you run any migration job, it's essential to ensure you can quickly recover in case anything goes wrong, from an accidental deletion of a user or an unwanted change to an object attribute, to a runaway script or an untimely attack on your IT ecosystem.

If you have a hybrid environment in which you're synching your on-prem AD up to the cloud, don't be fooled into thinking your on-prem backup and recovery solution has you covered. It can't protect what it doesn't know about, and Azure AD has objects and properties that simply do not exist in on-premises AD, including:

- Roles
- Licenses
- Multi-Factor Authentication (MFA) settings
- Conditional Access policies
- Dynamic group definitions
- Applications and service principals

Therefore, if a user account gets deleted by mistake during the migration, you could restore it from your on-prem AD — but it would be missing its Office 365 license attributes that the user needs to access critical workloads.

Here's another example: Suppose you have several Active Directory OUs with security groups that are being synched to Azure AD to grant certain users access to specific SharePoint Online sites. You also have a rule that whenever a security group exceeds its attestation period, it is moved into a deprovisioning OU to await final decommissioning. Now suppose a security group that enables a key team to access critical data misses its attestation deadline and is therefore moved. As soon as Azure AD Connect detects that the group is no longer in scope, it will remove the security group in the cloud. As a result, users who were members of that group will lose their access to the sites they need and start logging tickets.

To correct the issue, you'll move the security group back into the proper OU, and Azure AD Connect will create a new security group in Azure AD. That security group will have the same name and the same members — but it will be assigned a new ID, so the process will not restore the users' access to the SharePoint Online data. To restore access using native tools, you'll need to consult your documentation about which SharePoint Online sites the group needs to have access to (or scramble to figure it out), and then re-apply the new group to those sites. This process takes time and effort, adding to IT workload and hurting user productivity

What about the native Azure AD Recycle Bin? It can help you recover certain objects. In particular, the following Azure AD objects are "soft deleted," which means they can be restored from the Recycle Bin:

- User and guest accounts
- Microsoft 365 groups (including associated data such as properties, members, e-mail addresses, Exchange Online shared inbox and calendar, SharePoint Online team site and files, OneNote notebook, Planner, Teams, and Yammer group and group content)
- Azure AD applications

Note, however, that soft-deleted objects remain in the Recycle Bin for only

A large wireless provider plans and performs seamless tenant migrations with On Demand Migration, lauding the solution for its "easy interface, easy to identify issues and get status, and fast setup."

Source: TechValidate, TVID 61B-CCO-A74

30 days; then they are permanently deleted and cannot be recovered with native tools.

Other objects, however, are "hard deleted," which means they are never put into the Recycle Bin and therefore cannot be restored from it. Azure AD objects that are immediately hard deleted include:

- Security groups
- Distribution groups
- Service principals
- Conditional Access policies
- Devices

In addition, many Azure AD objects have complex configurations or specific interactions with other systems; those details are not captured by the Recycle Bin and cannot be restored from it. Moreover, the Recycle Bin is for deleted objects only. If an object has been changed rather than deleted, the Recycle Bin cannot help you restore the object to its previous state.

In short, recovering data in Azure AD using native tools works well if the scenario fits two fairly rigid guidelines:

- You want to recover an Azure AD user, Microsoft 365 group or Azure AD application that was deleted (not modified).
- No more than 30 days have passed since the object was deleted.

For other scenarios, you need a comprehensive backup and recovery solution. With On Demand Migration, you can quickly and securely back up and recover your Azure AD and Office 365, which dramatically reduces the risk involved in a tenant-to-tenant migration. On Demand Recovery enables you to granularly search and restore exactly what you need, down to specific attributes, as well as to recover multiple users, groups and group memberships in bulk. Plus, On Demand Recovery integrates with Recovery Manager for Active Directory to deliver a complete hybrid recovery solution with a single recovery dashboard for both hybrid and cloud-only objects.

Track Changes to Azure AD and Office 365

Since migration involves altering the makeup of your IT ecosystem, many of the tasks involved require elevated privileges. If those privileged accounts are being used for unauthorized activities, you need to be able to investigate promptly and determine whether you have a rogue insider or the account was compromised by an attacker. You also need to know right away about changes to critical objects, so you can respond in time to avert a breach or business disruption.

Unfortunately, native Azure AD and Office 365 auditing logs and tools leave a lot to be desired. Here are the top limitations you need to know about:

- To audit Azure AD, administrators must correlate information from two logs: the Audit Log (which contains all change events) and the Sign-in Log (which records all authentication events).
- To audit Office 365, administrators must comb through the Unified Audit Log, which includes all administrator-level and user-level events from each Office 365 application (Exchange Online, SharePoint Online, OneDrive for Business, Teams and so on), as well as events from the Azure Audit Log and Sign-in Log.
- For organizations with hybrid environments, it is not possible to search audit activity across on-premises and cloud workloads in a single view.
- The audit policies for on-premises workloads must be con¬figured separately from those for cloud workloads, and there is no way to monitor whether audit policies are being changed or disabled.
- Events are formatted differently depending on the type of event and whether it occurred on premises or in the cloud, which makes them difficult to interpret and correlate.
- There can be a delay of 24 hours or more in processing some events and adding them to the Unified Audit Log.
- Although both Azure and Office 365 provide a web portal for accessing audit events. the portal displays only 15 events at a time, and the processing delay means that not all rele¬vant audit events are necessarily there at once. It is also possible to access the audit events for Azure and Office 365 through PowerShell.

Don't be fooled into thinking your on-prem backup and recovery solution has your hybrid IT environment covered.

- The retention period of logs in Azure varies based on workload and subscription type, but it is often not long enough to enable effective incident investigation and regulatory compliance.

On Demand Audit consolidates event data from your on-prem and Office 365 workloads and delivers a single view of activity across your hybrid environment. You can easily track AD logon/logoff activity and Azure AD sign-ins, and detect and alert on critical changes in AD, Azure AD, Exchange Online, SharePoint Online, OneDrive for Business and Teams. With that detailed intelligence, you can keep your migration product securely on track.

Migrate while ensuring seamless coexistence

Only the very smallest of migrations can happen over a weekend; in most cases, you need weeks or months to complete the job — and you need to keep users happy and productive throughout.

On Demand Migration enables you to securely migrate users and data from one tenant to another with seamless coexistence. Built-in reporting enables you to easily keep stakeholders informed, and automated HR integration enables you to ensure the right users are provisioned in strict accordance with the least-privilege model.

As explained earlier, On Demand Migration covers all your critical workloads, including email, OneDrive, SharePoint and Teams. Here are just the top capabilities that the solution provides in each area:

- **Mail and public folders**
  - Migrate mail to the primary mailbox or archive mailbox for each user
  - Filter out unneeded mail by folder, type and date
  - Ensure uninterrupted access by migrating permissions and delegates
  - Perform address rewriting to maintain a single domain brand for all or selected users
  - Update Outlook profiles once migration completes
- **OneDrive**
  - Migrate file versions for each document
  - Preserve user and sharing permissions to enable continued access
  - Filter out unneeded data based on folder, type, date and size.
  - Schedule migration tasks to meet your schedule
- **SharePoint**
  - Migrate classic and modern team sites to your target tenant
  - Migrate documents, libraries and lists
  - Preserve metadata and permissions
  - For more complex SharePoint migrations, you can use Metalogix Essentials for Office 365 to move and reorganize content from SharePoint Online, on-prem SharePoint, multiple cloud service providers, and on-premises file shares, all from a single console. You can easily manage permissions and gather valuable intelligence about user adoption.
- **Teams**
  - Preserve user and group access and permissions
  - Migrate files stored in Teams channels
  - Rename or merge Teams while migrating
  - Migrate Office 365 Groups and content

DAY 2: ONGOING BUSINESS

Even when your migration is done, your work isn't. You need to effectively and efficiently manage, secure, and back up and recover your newly consolidated Microsoft environment. With Quest, you can do exactly that — using many of the same solutions used throughout the migration process. And when the next M&A comes along, or you simply need to upgrade or migrate systems for other reasons, you'll not only have the tools you need already installed, you'll be fluent in using them.

Here are the key tasks you need to be prepared for:

On Demand Recovery dramatically reduces migration risk by enabling you to quickly and securely back up and recover your Azure AD and Office 365.

On Demand Audit consolidates event data from your on-prem and Office 365 workloads and delivers a single view of activity across your hybrid environment.

- Manage license utilization and costs
- Enforce group creation policies
- Track all changes made on prem and in the cloud
- Recover from changes made to hybrid and cloud accounts

Manage license utilization and costs

As explained earlier, On Demand License Management makes it easy to see how many licenses you have and who they are assigned. But the platform goes further, enabling you to not just ensure you have enough licenses to enable productivity, you can ensure that you have the optimal number of licenses to ensure productivity while controlling costs. In particular, On Demand License Management can help you ensure you're not paying for more licenses than you need, and that you're getting full value from the licenses you've purchased. And because you can easily customize rates to your organization, you can understand the true costs of your unused and under-utilized licenses.

- **Minimizing the cost of unused licenses** — Since the demand for Office 365 licenses ebbs and flows over time, many organizations maintain a pool of unused licenses — sometimes as much as 15 or 20 percent of licenses are on standby. For a medium-sized organization with 5,000 users, maintaining a 15-percent pool of basic Enterprise E3 licenses can cost close to $200,000 a year in unused licenses. Tack on the cost of additional licenses, such as security and collaboration products like Microsoft Visio or Power BI Pro, and that number can easily exceed $500,000. On Demand License Management gives you the deep visibility into license usage in each area of the business (department, office and so on), so you can safely reduce the size of the license pool maintain, saving you money year after year.

  Another source of unused licenses is licenses that are assigned to users but that are not being utilized. This situation is more common than you might think. For example, a user might not need a particular license anymore because of a change in job function that never got communicated to IT, or a license might be assigned to an account that is temporarily disabled because it belongs to a seasonal worker or an employee on a leave of absence. On Demand License Management enables you to easily identify licenses that are not being used and see which business area is responsible for them, so you can work with your business counterparts to reclaim and re-use those licenses, thereby reducing costs.

- **Maximizing the value of the licenses you're paying for** — Office 365 licenses typically include many core Microsoft products, but users often don't take advantage of all those solutions. Moreover, using multiple Office 365 products together often enables higher productivity and better collaboration than using just one or two of them separately. Therefore, by increasing the adoption of unused Office 365 products, your organization will realize ROI in two ways: More users will be consuming what you've already paid for, and users and groups will realize a productivity benefit.

  On Demand License Management helps you drive adoption of Office 365 tools by showing you which users and groups are actually using the Office 365 services they have been provisioned, and which ones are not. You can use that intelligence to create targeted adoption campaigns; even simple actions, like letting users and groups know which products they have access to and the benefits they could reap from them, can boost product usage significantly, increasing ROI.

Enforce group creation policies

Years of exponential growth of Active Directory has left many organizations with a serious problem: lack of insight into the security groups, distribution groups and shared mailboxes that give users access to information and applications across the IT environment. When they moved to the cloud, the group sprawl often came with them — and then exploded. Now they also have to worry about:

- Azure AD security groups, which are created to manage cloud-only accounts such as B2B and B2C accounts for partners, customers and other external users.
- Azure AD mail-enabled security groups, which are used for granting users access to SharePoint resources and emailing notifications to those users.
- Microsoft 365 groups, which grant access to resources like the group's shared mailbox and calendar, SharePoint site collection, and OneNote notebook, and possibly to resources in applications like Teams, Yammer, Planner and PowerBI.

Matrix Metals uses On Demand Migration to manage its Office 365 migrations, giving it a "10 out of 10 rating" and applauding its "ease of use and straightforward approach."

Source: TechValidate, TVID E60-792-41D

Maintaining a 15-percent pool of basic E3 licenses could be costing you $200,000 a year in unused licenses. Plug that hole in your budget with On Demand License Management.

Microsoft 365 groups are particularly concerning for two reasons. First, they can include guests, which gives users from outside the organization access to the group's resources. Second, users can create Microsoft 365 groups as they please, and these groups are also created automatically by various applications, such as Teams and SharePoint Online. As a result, Microsoft 365 groups can spiral out of control quite quickly.

- Cloud-only distribution groups and shared mailboxes, which can give access to sensitive or regulated data.

Failure to manage this groups effectively can lead to authorization creep and leave the organization vulnerable to serious security and compliance risks. Group sprawl also hurts productivity in multiple ways. Without insight into who has access to what, IT administrators will struggle with incident investigations compliance audits and provisioning tasks. Since the person who creates an Microsoft 365 group can name it anything they please, and the name of each group appears in the GAL, over time, users will find it harder and harder to locate the individuals and groups they need. From there, the problem can snowball: Since it's hard for users to determine whether there's already a group that would serve their needs, they create a new one — making the GAL even longer and perpetuating the cycle.

On Demand Group Management enables you to reign in the chaos of creating and managing Azure AD, Office 365 and hybrid AD groups. You can establish robust group creation policies and enforce rules as groups are created. In particular, you can ensure that on-premises and cloud groups conform to standard naming conventions and have clear ownership with an established purpose. Moreover, you can reduce IT overhead by enabling users to quickly determine their group memberships and request changes, and empowering owners to add and remove members and perform regular attestation.

Track all changes made on prem and in the cloud

We saw earlier how On Demand Audit enables you to gain control over changes and sign-in activity during your migration, but clearly, you need the same control moving forward. On Demand Audit will continue to deliver value long after your migration project is complete, giving you unified insight into activity across your hybrid environment. You can easily track Azure AD sign-ins and AD logon/logoff activity, including both Kerberos and NTLM authentications. You can also detect and alert on critical configuration, user and administrator changes made in AD, Azure AD and Office 365 workloads as listed above in the Day 1 phase. And in case of an incident, On Demand Audit slashes investigation time with fast, flexible searches and interactive data visualization.

Recover from changes made to hybrid and cloud accounts

Similarly, reliable, flexible backup and recovery is just as essential after your migration as it was in preparation for it. In addition to enabling you to back up and restore hybrid and cloud objects like Office 365 license attributes, Azure AD groups, and B2B and B2C user accounts, On Demand Recovery offers:

- **An intuitive hybrid recovery dashboard** — By integrating On Demand Recovery with any edition of Recovery Manager for Active Directory, you get a complete recovery solution that covers both hybrid and cloud-only objects from a single dashboard.
- **Difference reporting** — You can run difference reports to visually compare your current AD and Azure AD with any past backup, and then roll back errant changes right from the report.
- **Comprehensive, bulk recovery** — Recover multiple on-premises AD, Azure AD and Office 365 users, groups, attributes and other object properties at the same time, without having to write PowerShell scripts or access multiple admin interfaces.
- **Granular search and restore** — Search for modified or deleted on-premises and cloud-only objects, either entire user accounts or just specific attributes, and restore exactly what you need. Reduce the risk of manual error and ensure all recovery-related tasks are auditable.
- **Secure, encrypted backups** — Easily and securely back up critical data in Azure, including Azure AD and Office 365 users, attributes, groups, group memberships, and Azure applications. Choose the backup retention period that best fits your company's compliance and other needs.

Office 365 licenses typically include multiple products. If you're not using those products, you're underutilizing the licenses you're paying for.

A construction company that used On Demand Migration to clean up its tenants after acquisitions rated it "9 out of 10," noting it "worked well" and had "reasonable pricing."

Source: TechValidate TVID 349-2FD-6FA

"Without On Demand Audit, I wouldn't be able to track privileged changes to critical systems."

Source: TechValidate TVID C0A-DCB-775

- **Restore and reconnect hard-deleted mailbox data —** When an Office 365 mailbox is deleted, the connection between the mailbox and the email data is lost. On Demand Recovery re establishes this connection to eliminate email data loss and minimize the impact on productivity.

CONCLUSION

Quest has been helping customers achieve successful Microsoft platform migrations and consolidations for decades. For tenant-to-tenant migrations, look to the On Demand family of solutions, as summarized in Figure 2. On Demand solutions are proven to help simplify migration planning, overcome migration challenges and speed project completion while minimizing costs, risks and business disruptions. Moreover, they are reusable — after your migration, you can rely on them for ongoing governance and management of your target environment, and you'll be well prepared to handle all the additional migrations in your future.

On Demand is your go-to SaaS dashboard for tackling Microsoft challenges in a hybrid world.

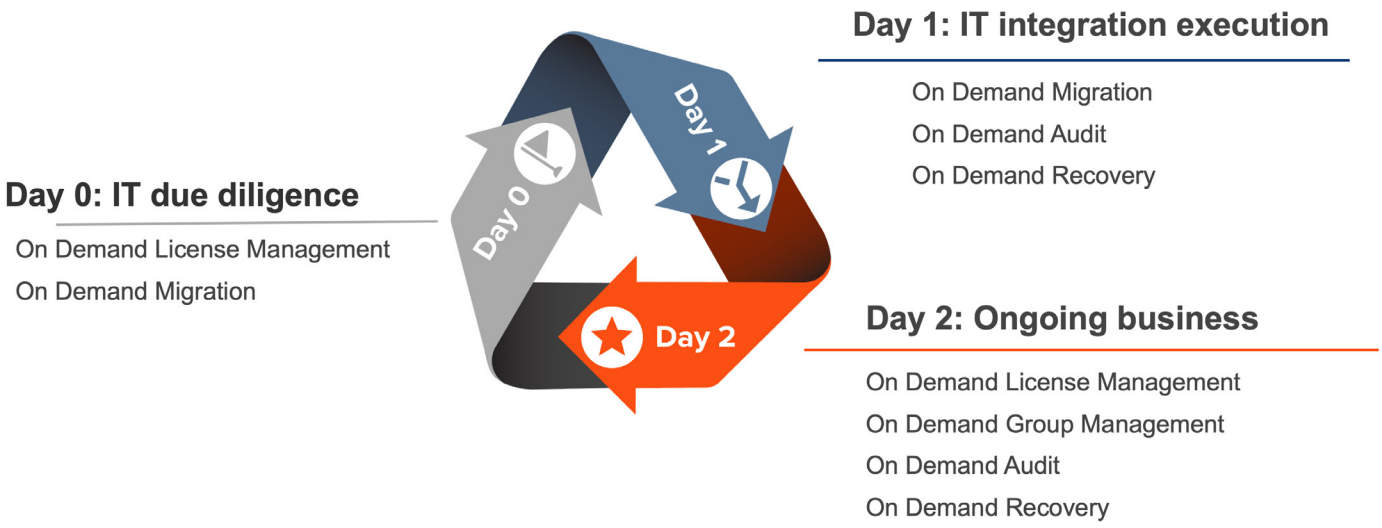

Figure 2. Quest offers reusable solutions for tenant-to-tenant migration that deliver ongoing value.

ABOUT QUEST

Quest provides software solutions for the rapidly changing world of enterprise IT. We help simplify the challenges caused by data explosion, cloud expansion, hybrid data centers, security threats and regulatory requirements. We're a global provider to 130,000 companies across 100 countries, including 95% of the Fortune 500 and 90% of the Global 1000. Since 1987, we've built a portfolio of solutions which now includes database management, data protection, identity and access management, Microsoft platform management and unified endpoint management. With Quest, organizations spend less time on IT administration and more time on business innovation. For more information, visit www.quest.com.

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Quest Software Inc.
Attn: LEGAL Dept
4 Polaris Way
Aliso Viejo, CA 92656

Refer to our website (www.quest.com) for regional and international office information.