**Migration Procedure Outline**

**Process Outline:**

Kickoff Call:

* Preliminary call between CSP, their PS/implementation team, and the end-customer to review the migration and steps to proceed.
  + Outline the migration and give an overall understanding of the expectations.
  + Outline possibility of Support engagement, in preparation for any issues that may arise and cannot be quickly resolved
  + Provide sizing documentation, best practices, and other documentation as needed
    - If endeavor is a migration only and continued replication with Zerto will not be used after, suggest 1-hour journals and other best practices for datastore conservation
  + Schedule the next steps during this call. Either the migration itself, if end-customer is already a Zerto user, or the initial ZVM installation and setup.
* If ZVM installation is required, make sure to review the follow on the preliminary call:
* Gather customer environment information. I.E. Hypervisor (VMware/Hyper-v/Etc.), networking items, etc.
* Provide customer with Zerto Enterprise Guidelines PDF during the call and again in an email afterwards
* Review the Enterprise Guidelines PDF with customer, highlighting ZVM configuration, VRA configuration, Port requirements, and VPG configuration
* Q&A session held with customer regarding requirements, timeline for completion, and any unique circumstances for installation (environment variables)
* Schedule installation and provide further install documentation during the call and after via email (along with the guidelines documentation)

ZVM installation:

* Single site ZVM installation for customers who are not already using Zerto.
* Confirm Windows Servers are created for ZVR installation. If not, session must be rescheduled or extended to complete the preliminary actions.
* Confirm that the latest ZVR installer package is downloaded, and if not, download the latest from the myZerto site.
* Remotely connect to the Windows Server and copy the ZVM installation package to the VM (for each ZVM)
  + Unzip the package, then right click the installation file and choose “run as administrator” to begin the installation
  + Discuss EULA, installation directory (C:\ or other) and vCenter credentials needed
  + Confirm connectivity from ZVM to vCenter (port 443) discuss installer process while awaiting completion
  + Once complete, review best practices for ZVM (updates, AV, snapshots etc)
* If needed, log into vSphere Client, navigate to Plugin Manager, Enable Zerto Replication Plugin
* Navigate to Zerto Replication Plugin in the hypervisor or use the Zerto Replication GUI icon on the installed VM’s desktop
* Once the user is logged into the GUI, apply the Zerto license or pair to an existing site with a license.
* Review Zerto dashboard with customer to highlight enhanced GUI and features
* Navigate to the SETUP tab to enable Zerto VRAs. Assist customer with installing their VRAs
  + During initial configuration discuss each configuration option of VRA
* Assist customer in the creation of a VPG with full knowledge transfer
  + Create VPG name, review importance of VPG priority
  + Select virtual machines from list, show customer searchable VM field, review Boot Order and discuss use cases for delayed VM power on (SQL, AD DC, etc.)
  + Choose Recovery site, discuss recovery site options (no multi-site rep support, self rep)
  + Review Host configuration, highlight choice of host cluster vs. host, same with data store
  + Discuss Journal history (point in time fail over) review benefits of journal history length **\*Focus on function with migration and Move operation.**
  + Highlight “Advanced” field, inform customer of Journal Hard Limit, ability to change JRNL data store or replica data store (ZVM will sVmotion)
  + Discuss customers current RPO, Zerto RPO setting, inform customer checkpoints are system defined 5 seconds and not changed by RPO
  + Discuss current testing strategy and usefulness of Test reminder
  + Review WAN compression (LZ4) and best practices
  + Highlight Thin provision and Swap settings, discuss using Swap with paging files, SQL TempDB
  + Ensure customer understands Storage “Edit Selected” options, highlight initial sync vs Delta Sync (pre-seeding strategies) and ability to protect RDM’s
  + Discuss FailOver/Move Network and Test Network, importance of Test Bubble network (In AWS this will be VPC network and Instance Family / Type)
  + Recovery Folder and Templates if customer has them setup in DR environment
  + Discuss Zerto’s ability to execute pre/post scripting and location scripts should be posted
  + Ask customer about their need to change IPs when failing over, if applicable review RE-IP functionality, supported guest OS versions, need for VMware tools.
  + At high level discuss backup functionality, configuration of repository, length of archive (discuss jFLR)
  + Review Summary screen and go over details of VPG creation
  + Create VPG, navigate to VPG pane in ZVM GUI to discuss VPG settings screen and initialization

\***If engagement is migration only, limit journal size and cut down knowledge transfer**

Migration Engagement:

* CSP representative will perform the migration using the Move Operation of the VPGs
* Perform Move Operation of the VPGs
* Initiate Move Operation through the Zerto Actions button
* Review Execution parameters
* Highlight that the Move will always shut down the VM and why (flush data to disk)
* If applicable, discuss use cases of Fail Over Live vs Move (reverse protection)
* Log into target vCenter that the Move operation is executed to
* Review vCenter tasks while operation is occurring
* Allow customer the ability to console into VM once the operation is complete
  + Answer other questions accordingly, but within the scope of the migration
  + Schedule the final review call

Final Summary Call - “Environment Assessment”

* Call to review the finalized migration and any ending notes
  + Not a Healthcheck, review of only the VMs migrated and their status
  + End session with additional Q&A to wrap up engagement
  + Closing ceremony – May vary Can be handing off a runbook, final configuration documents, or simply an end of services departure.