Technical Guide



Migration Capability

Prepared for

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9/24/2017

Version Draft

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Revision and Signoff Sheet

Change Record

|  |  |  |  |
| --- | --- | --- | --- |
| Date | Author | Version | Change Reference |
|  |  | 1 | Initial draft for review/discussion |
|  |  |  |  |
|  |  |  |  |

Reviewers

|  |  |  |  |
| --- | --- | --- | --- |
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1. Overview

The purpose of this document is to detail all aspects of the Migration capability design and implementation as it relates to the <CUSTOMERNAME> - <PROJECTNAME> project. This document is for use by the <PROJECTNAME> project manager, <DELIVERYORG> technical specialists and <CUSTOMERNAME> IS and IT teams.

This document includes the design of features to support the Migration capability design including:

* Feature Migration
* Core Migration
* Migration Approach

1. Technical Design

This section outlines the design options, customer decisions and configuration for the capability.

The design of this capability identifies the appropriate configurations, customer and external services that are required to successfully implement and operate the Migration capability.

The design comprises of three key areas:

* Core infrastructure dependencies – all dependent services required for capability to operate.
* External prerequisites – all external prerequisites in the Configuration Manager offering.
* Design – details each of the features of the capability, including decisions and configuration parameters as discussed and captured through the design workshop for this capability.

The table below identifies key decisions that impact the overall implementation and ownership of the capability:

|  |  |  |
| --- | --- | --- |
| Decision | Justification | Impact |
| The migration capability won’t transfer content to the new Configuration Manager environment | Existing content contains many legacy items that are not required in the new environment. As such, content will be manually transferred to ensure only relevant content is retained. | Medium - The transfer of content to the new environment will be a manual activity performed by IT Administrators and is expected to take x days of effort |
| The migration capability won’t transfer configuration to the new Configuration Manager environment | The configuration of the new environment requires minimal administrative investment; little time or benefit is gained from transferring configuration from the existing environment. | Low - The configuration of the new environment will be a manual activity performed by IT administrators as part of <PROJECTNAME>. |
| The migration capability will transfer content using shared infrastructure | This approach reduces hardware cost, as the infrastructure required to support the design of the new environment requires distribution points to be placed alongside the distribution points in the existing environment | Medium – until all shared infrastructure components are migrated to the new environment, functionality, and features of the new environment (e.g. application model, App-V packages) may be limited |
| The migration capability will transfer configuration to support the following core items and features   * <CORE\_1> * <CORE\_n> * <FEATURE\_1> * <FEATURE\_n> | <CORE\_1> would require more administrative effort to configure manually and maintain than to migrate directly from the existing environment | Medium – administrative effort required to ensure both the current and new environments are kept up to date whilst both environments manage devices in the production environment |
| The migration capability will transfer content to support the following features:   * <FEATURE\_1> * <FEATURE\_n> | All content associated with <FEATURE\_1> in the existing environment is required in the new environment | Medium – administrative effort required to ensure both the current and new environments are kept up to date whilst both environments manage devices in the production environment |

Table 1: Migration Design Decisions

When considering the Migration Capability design, the process is separated into several key areas:

Delete any features from the list below if Migration Capability <FEATURE> is not being migrated in the customer environment.

* Feature Configuration:
* Software Update Management
* Application Management
* Platform Delivery
* Software Metering
* Asset Intelligence
* Settings Management (Desired Configuration Management)
* Core Configuration:
* Content Management
* Site Boundaries
* Client Agent
* Reporting
* Collections
* AMT-Based Devices
  1. Core Infrastructure Dependencies

This section identifies services required for the capability to operate. This includes the following mandatory services:

Delete any deployment infrastructure that isn’t required as part of the migration

|  |  |
| --- | --- |
| Component | Description |
| Environment | The refers to the System Center Configuration Manager environment which will be used to transfer feature and core content/configuration to the new Configuration Manager environment. This environment consists of the infrastructure, software, tools, applications, source files and configuration that will be used to successfully manage devices in the estate. |
| Networking | DNS and DHCP are required for communication between the existing System Center Configuration Manager environment and the new Configuration Manager environment. |
| Active Directory Domain Services | Active Directory Domain Services is required for authentication and authorization of site systems. |

Table 2: Infrastructure Dependencies

* 1. Environment Prerequisites

This section details prerequisites for the Migration Capability and provides context for the design decisions documented in subsequent sections.

The migration capability can migrate content and/or configuration from an existing System Center Configuration Manager 2007 environment, or an existing System Center Configuration Manager environment. Delete the option that isn’t used in the customer production environment.

|  |  |
| --- | --- |
| Item | Description |
| System Center Configuration Manager 2007 Source Hierarchy | The System Center Configuration Manager 2007 source hierarchy refers to the existing implementation of System Center Configuration Manager 2007 in the production environment. The Configuration Manager project requires the existing System Center Configuration Manager 2007 source hierarchy be patched to the following level to ensure content and configuration can be migrated:   * System Center Configuration Manager 2007 SP2 |
| System Center Configuration Manager Source Hierarchy | The System Center Configuration Manager source hierarchy refers to the existing implementation of System Center Configuration Manager in the production environment. The Configuration Manager project requires the existing System Center Configuration Manager 2012 source hierarchy be patched to the following level to ensure content and configuration can be migrated:   * System Center Configuration Manager 2012 SP1 or SP2 * System Center 2012 R2 Configuration Manager SP1 |

Table 3: Environment Prerequisites of Migration Capability.

This section should be changed and/or completed to detail the Migration Capability prerequisite design decisions specified by the customer. Update this section as required

The following table describes how the infrastructure considerations and prerequisites are addressed:

|  |  |  |
| --- | --- | --- |
| Component | Prerequisite Met | Description of service required |
| System Center Configuration Manager 2007 Source Hierarchy | <YES/NO> | Source Hierarchy must be patched to support System Center Configuration Manager 2007 SP2 |
| System Center Configuration Manager Source Hierarchy | <YES/NO> | Source Hierarchy must be patched to support System Center Configuration Manager 2012 SP1/SP2 or System Center 2012 R2 Configuration Manager SP1 |

Table 4: Migration Capability Infrastructure Considerations and Prerequisites

* 1. Migration Approach

This section details decisions related to the approach to migrate content from the current System Center Configuration Manager environment to the new Configuration Manager Environment. The scope of the project provides for the migration of all required core configuration to the new environment, and selected content to be migrated to support the pilot users migrated to the new environment.

Three design options exist to migrate content. The first option is to create a new hierarchy and manually import content into the new environment from the customer definitive media library (DML) without running migration tasks that rely on a connection from the existing environment. The second and third options rely on interacting directly with the existing configuration manager environment, by using migration jobs

The table below provides a list of all design decisions related to the implementation in the customer production environment.

|  |  |  |  |
| --- | --- | --- | --- |
| Design Decision | Design Options | Decision | Justification |
| Migration Approach | * Manual Migration **(Default)** * Hybrid Side-by-Side | **Manual Migration** | * Immediately take full native advantage of all improvements in architecture, security, and functionality * Unwanted configuration drift not migrated into new environment |

Table 5: Design decisions for Migration Approach

* 1. Feature Migration

This section details decisions related to the features within Configuration Manager that will be migrated as part of the Migration capability.

The scope of the project provides for the definition of a migration strategy and the running of a pilot migration to confirm migration functionality

The table below provides a list of all design decisions related to the implementation in the customer production environment.

|  |  |  |  |
| --- | --- | --- | --- |
| Design Decision | Design Options | Decision | Justification |
| Software Update Management | * Do not migrate **(Default)** * Migrate – Selective * Migrate – Full | **Do not migrate** | Provides the cleanest implementation of Configuration Manager |
| Application Management | * Do not migrate **(Default)** * Migrate – Selective * Migrate - Full | **Do not migrate** | Provides the cleanest implementation of Configuration Manager |
| Platform Delivery | * Do not migrate **(Default)** * Migrate – Selective * Migrate - Full | **Do not migrate** | Provides the cleanest implementation of Configuration Manager |
| Software Metering | * Do not migrate **(Default)** * Migrate – Selective * Migrate - Full | **Do not migrate** | Provides the cleanest implementation of Configuration Manager |
| Asset Intelligence | * Do not migrate **(Default)** * Migrate – Selective * Migrate - Full | **Do not migrate** | Provides the cleanest implementation of Configuration Manager |
| Settings Management | * Do not migrate **(Default)** * Migrate – Selective * Migrate - Full | **Do not migrate** | Provides the cleanest implementation of Configuration Manager |

Table 6: Design decisions for Feature Migration

* 1. Core Migration

This section details decisions related to the core infrastructure aspects of System Center Configuration Manager that will be migrated as part of the Migration capability.

The scope of the project provides for the definition of a migration strategy and the running of a pilot migration to confirm migration functionality

The table blow provides a list of all design decisions related to the implementation in the customer production environment.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Design Decision | Design Options | Decision | | | Justification |
| Content Management | * New Distribution Point Infrastructure **(Default)** * Shared Distribution Point Infrastructure | | **New Distribution Point Infrastructure** | Allows customer to take immediate advantage of Application Model format and App-V package deployment | | |
| Site Boundaries | * Do not migrate **(Default)** * Migrate Site Boundaries | | **Do not migrate** | Allows customer to reduce risk by manually creating new site boundaries | | |
| Client Agent | * Client Push **(Default)** * Existing infrastructure * Machine Rebuild * Startup Script * Manual | | **Client Push** | Provides the simplest deployment mechanism | | |
| Reporting | * Re-create SQL Reporting Services Reports in Configuration Manager **(Default)** * Do not migrate * Export and Import Reports through SQL Reporting Services | | **Re-create SQL Reporting Services Reports in Configuration Manager** | Allows customer to retain required report functionality | | |
| Collections | * Do not migrate **(Default)** * Migrate Collections and Assigned Advertisements * Migrate Collections only | | **Do not migrate** | Ensures that collection structure is closely coupled with the implemented RBAC model | | |
| AMT-based Computers | * De-provision at Destination **(Default)** * De-provision at Source * Not required | | **De-provision at Destination** | Minimizes lack of out-of-band functionality during migration process. Note that Intel SCS Add-on must be installed in Destination environment | | |

Table 7: Design decisions for Core Migration

1. Technical Implementation

This section details the implementation of the Migration capability developed for the environment and the steps to install, configure, and operate the required component that will deliver the Migration capability.

The following high-level activities are needed:

|  |  |
| --- | --- |
| Section | Activity |
| 3.2 | Configure Source Hierarchy |
| 3.3 | Shared Distribution Points |
| 3.4 | Configure Collection Migration Jobs |
| 3.5 | Configure Object Migration Jobs |
| 3.6 | Configure Changed Object Migration Jobs |
| 3.7 | Run Migration Jobs |
| 3.8 | Migrate Clients |
| 3.9 | Upgrade Shared Distribution Points |
| 3.10 | Complete Migration |

Table 8: List of tasks to prepare for the Migration capability

* 1. Implementation Activities and Tasks

Remove the high-level tasks that are not applicable to the chosen migration approach



Figure 1: Migration component implementation steps

* 1. Configure Source Hierarchy

Applicable for Hybrid Side-by-Side Migration, remove if not applicable

A Source Hierarchy must be configured to enable Hybrid Side-by-Side migration using the steps below.

|  |  |  |
| --- | --- | --- |
| Task | Rationale | Implementation Guidance |
| Create Source Site Account | Account required to access the SMS Provider at the source site | * Create an account with **Read** permission to all source site objects |
| Create Source Site Database Account | Account required to access the SQL Server database at the source site | * Create an account with **Connect**, **Execute**, and **Select** permissions to the source site database |
| Configure Source Hierarchy | Required to allow Hybrid Side-by-Side migration to migrate collections and objects | * Refer to <https://docs.microsoft.com/en-us/sccm/core/migration/configuring-source-hierarchies-and-source-sites-for-migration> |

Table 9: configure Source Hierarchy Implementation

* 1. Shared Distribution Points

Applicable for Shared Distribution Points, remove if not applicable

Shared Distribution Point functionality is a site-wide setting that must be configured using the steps below.

|  |  |  |
| --- | --- | --- |
| Task | Rationale | Implementation Guidance |
| Share Distribution Point | Required to allow the Configuration Manager clients to access content from the System Center Configuration Manager 2007 SP2 environment | * Refer to <https://docs.microsoft.com/en-us/sccm/core/migration/operations-for-migration#Create_Edit_migration_Jobs> |

Table 10: Shared Distribution Points Implementation

* 1. Configure Collection Migration Jobs

Applicable for Collection Migration from System Center 2012 Configuration Manager only, remove if not applicable

Collection migration can be configured for collection-only migration or collection and advertisement migration using the steps below.

|  |  |  |
| --- | --- | --- |
| Task | Rationale | Implementation Guidance |
| Create migration job to migrate collections | Required to migrate collections and associated objects | * Refer to <https://docs.microsoft.com/en-us/sccm/core/migration/operations-for-migration#Create_Edit_migration_Jobs> |

Table 11: Configure Collection Migration Jobs Implementation

* 1. Configure Object Migration Jobs

Applicable for Object Migration, remove if not applicable

Each object required for migration must be defined within an object migration job that is configured using the steps below.

|  |  |  |
| --- | --- | --- |
| Task | Rationale | Implementation Guidance |
| Destination site Software Update Synchronization | The destination site Software Update Point must be configured with the same settings as the source site and be fully synchronized with the upstream source or migration could fail | * Refer to <https://docs.microsoft.com/en-us/sccm/core/migration/planning-for-the-migration-of-objects#Plan_migrate_Software_updates> |
| Remove MDT based tasks in a copy of the source site task sequences | Migration of OSD Task Sequences with MDT based tasks will fail as these cannot be interpreted by the migration tool | 1. Copy existing MDT based Task Sequences 2. Edit copied version of MDT based Task Sequences to replace the MDT based tasks with non-MDT based placeholder tasks |
| Create Migration Job to migrate objects | Each object to be migrated must be defined within a Migration Job | * Refer to <https://docs.microsoft.com/en-us/sccm/core/migration/operations-for-migration#Create_Edit_migration_Jobs> |

Table 12: Configure Object Migration Jobs Implementation

* 1. Run Migration Jobs

Applicable for Object Migration, remove if not applicable

Once the migration jobs have been configured as detailed in the previous sections, it is necessary to run them using the steps below.

|  |  |  |
| --- | --- | --- |
| Task | Rationale | Implementation Guidance |
| Start Migration Jobs | Required to run migration jobs | * Refer to <https://docs.microsoft.com/en-us/sccm/core/migration/operations-for-migration#a-namerunmigrationjobsa-run-migration-jobs> |

Table 13: Run Migration Jobs Implementation

* 1. Configure Changed Object Migration Jobs

Applicable for Object Migration, remove if not applicable

Migrated objects that are modified in the source environment after the initial synchronization should be resynchronized with the destination environment using the steps below.

|  |  |  |
| --- | --- | --- |
| Task | Rationale | Implementation Guidance |
| Create migration job to migrate objects that have changed since migration | Required to migrate objects that have been changed after the initial migration. This job overwrites the previously migrated objects | * Refer to <https://docs.microsoft.com/en-us/sccm/core/migration/operations-for-migration#a-namecreateeditmigrationjobsa-create-and-edit-migration-jobs> |

Table 14: Configure Changed Object Migration Jobs Implementation

* 1. Migrate Clients

For a machine to communicate with the Configuration Manager environment, the Configuration Manager client must be installed using the steps below.

|  |  |  |
| --- | --- | --- |
| Task | Rationale | Implementation Guidance |
| Deploy Configuration Manager client to existing client machines | Clients must have Configuration Manager client installed to communicate with the destination hierarchy | * The installation of the client agents is addressed in the Core Infrastructure Technical Guide. Refer to the Core Infrastructure Technical guide for further information. |

Table 15: Migrate Clients Implementation

* 1. Upgrade Shared Distribution Points

Applicable for Shared Distribution Points, remove if not applicable

Once client migration is complete, the Shared Distribution Points should be upgraded (if required) using the steps below.

|  |  |  |
| --- | --- | --- |
| Task | Rationale | Implementation Guidance |
| Add rights to Source Site Account | Source Site account requires additional permissions to allow removal of distribution points from the source site | * Grant the Source Site account **Read**, **Execute**, and **Delete** permissions to the **Site** class on the source site |
| Upgrade Shared Distribution Point | Required to convert the System Center Configuration Manager 2007 SP2 Shared Distribution Points into the Configuration Manager environment | * Refer to <https://docs.microsoft.com/en-us/sccm/core/migration/operations-for-migration#BKMK_ProcUpgrdSS> for further information |

Table 16: Upgrade Shared Distribution Points Implementation

* 1. Complete Migration

To complete migration the Migration jobs must be stopped, System Center Configuration Manager 2007 SP2 site information publishing stopped and the System Center Configuration Manager 2007 SP2 infrastructure decommissioned using the steps below.

Remove the ‘Stop migration’ step if conducting a manual migration approach

|  |  |  |
| --- | --- | --- |
| Task | Rationale | Implementation Guidance |
| Stop migration | Required to prevent migration jobs running during decommissioning | * Refer to <https://docs.microsoft.com/en-us/sccm/core/migration/operations-for-migration#Complete_Migration> |
| Stop System Center Configuration Manager 2007 SP2 publishing site information into AD | To ensure that any references to System Center Configuration Manager 2007 SP2 environment are removed from AD | * Refer to <https://technet.microsoft.com/en-us/library/bb680429.aspx> |
| Decommission System Center Configuration Manager 2007 SP2 infrastructure | No requirement to leave legacy infrastructure powered-on | * Power off all remaining System Center Configuration Manager 2007 SP2 infrastructure |

Table 17: Complete Migration Implementation

1. Test Plan

This section details the test plan for the Migration component developed for the environment.

Remove the test scenarios that are not applicable to the chosen migration approach



Figure 2: Migration Test Scenario

The following sections define the description of how testing should start, pause, and stop for each test criteria. These are key quality metrics to be used in ensuring the items under test are ready to progress to the next stage in the testing process.

* 1. Migration Jobs

Applicable for object and collection migration, remove if not applicable

List of tasks we need to perform to test the migration of jobs

|  |  |  |
| --- | --- | --- |
| Task ID | Description | Pass / Fail |
| 1 | Confirm that the migrated collections and objects are correctly displayed and accessible in the Configuration Manager environment and that the migration job monitoring displays no errors | Choose an item. |

Table 18: Migration Jobs Test Criteria

* 1. Software Update Migration

Applicable for Software Update migration, remove if not applicable

List of tasks we need to perform to test software updates

|  |  |  |
| --- | --- | --- |
| Task ID | Description | Pass / Fail |
| 1 | Migrated Software Update Lists deploy successfully to machines in the Configuration Manager environment | Choose an item. |

Table 19: Software Update Test Criteria

* 1. Package Migration

Applicable for Package migration, remove if not applicable

List of tasks we need to perform to test package migration

|  |  |  |
| --- | --- | --- |
| Task ID | Description | Pass / Fail |
| 1 | Migrated packages deploy successfully to machines in the Configuration Manager environment | Choose an item. |

Table 20: Package Migration Test Criteria

* 1. Operating System Deployment Migration

Applicable for OSD migration, remove if not applicable

List of tasks we need to perform to test the migration of Operating System Deployment components

|  |  |  |
| --- | --- | --- |
| Task ID | Description | Pass / Fail |
| 1 | Migrated OSD Task Sequences deploy successfully to machines from the Configuration Manager environment | Choose an item. |

Table 21: Operating System Deployment Migration Test Criteria

* 1. Settings Management Migration

Applicable for Settings Management migration, remove if not applicable

List of tasks we need to perform to test settings management

|  |  |  |
| --- | --- | --- |
| Task ID | Description | Pass / Fail |
| 1 | Migrated Settings Management Baselines deploy successfully to machines in the Configuration Manager environment | Choose an item. |

Table 22: Settings Management Test Criteria

* 1. Software Metering Migration

Applicable for Software Metering migration, remove if not applicable

List of tasks we need to perform to test software metering

|  |  |  |
| --- | --- | --- |
| Task ID | Description | Pass / Fail |
| 1 | Migrated Software Metering Rules deploy successfully to machines in the Configuration Manager environment | Choose an item. |

Table 23: Software Metering Test Criteria

* 1. Shared Distribution Points

Applicable for Shared Distribution Points, remove if not applicable

List of tasks we need to perform to test shared distribution points

|  |  |  |
| --- | --- | --- |
| Task ID | Description | Pass / Fail |
| 1 | Packages residing on Shared Distribution Point infrastructure deploy successfully to machines in the Configuration Manager environment | Choose an item. |
| 2 | Packages residing on Shared Distribution Point infrastructure deploy successfully to machines in the Microsoft System Center Configuration Manager 2007 SP2 environment | Choose an item. |

Table 24: Shared Distribution Points Test Criteria

* 1. Client Migration

List of tasks we need to perform to test client migration

|  |  |  |
| --- | --- | --- |
| Task ID | Description | Pass / Fail |
| 1 | Machines upgrade to the Configuration Manager client, correctly assign to the destination site, and successfully communicate with the destination site infrastructure | Choose an item. |

Table 25: Client Migration Test Criteria

* 1. Collection Migration – Advertisement Run-State

Applicable for Collection migration, remove if not applicable

List of tasks we need to perform to test the run-state retention of advertisements

|  |  |  |
| --- | --- | --- |
| Task ID | Description | Pass / Fail |
| 1 | Migrated Configuration Manager clients retain their advertisement run-state and migrated advertisements are not re-run | Choose an item. |

Table 26: Advertisement Run-State Test Criteria

1. Component Operation

This section details the operation of the capability as implemented in the production environment. The following scenarios encompass the common operational tasks required during the migration process.

|  |  |  |
| --- | --- | --- |
| Scenario | Outcome | Tasks |
| Monitor Migration Job Status | Migration jobs complete successfully | Refer to <https://docs.microsoft.com/en-us/sccm/core/migration/operations-for-migration#a-namemonitormigrationa-monitor-migration-activity-in-the-migration-workspace> |
| Monitor Client Migration status | Clients are successfully migrating into the Configuration Manager environment | Refer to <https://docs.microsoft.com/en-us/sccm/core/clients/manage/monitor-clients> |
| Re-run Migration Jobs | Migration jobs run successfully | Refer to <https://docs.microsoft.com/en-us/sccm/core/migration/operations-for-migration#a-namerunmigrationjobsa-run-migration-jobs> |
| Configure Changed Object Migration Jobs | Modified source environment objects are resynchronized successfully | Refer to <https://docs.microsoft.com/en-us/sccm/core/migration/operations-for-migration#a-namecreateeditmigrationjobsa-create-and-edit-migration-jobs> |

Table 27: Component Operation for Migration Capability

1. Feature Migration

|  |  |  |  |
| --- | --- | --- | --- |
| Feature | Content to migrate | Configuration to migrate | Comments |
| Software Update Management |  |  |  |
| Application Management |  |  |  |
| Platform Delivery |  |  |  |
| Software Metering | N/A |  |  |
| Asset Intelligence | N/A |  |  |
| Settings Management | N/A |  |  |

Table 28: Feature Migration Configuration

1. Core Migration

|  |  |  |
| --- | --- | --- |
| Core | Configuration to migrate | Comments |
| Site Boundaries |  |  |
| Client Agent |  |  |
| Reporting |  |  |
| Collections |  |  |
| AMT-based Computers |  |  |

Table 29: Core Migration Configuration