**Guide to perform an Office 365 migration using the Express method (for smaller environments)**

**Step 1: Prepare for the migration**

* Sign up for an Office 365 account and have your global administrator account ready
* Verify your domain
* Make sure that your external domain name is added as an Alternative UPN suffix in AD Domains & Trusts: Right-click Active Directory Domains and Trusts > select Properties. Enter your email domain name > click Add >Click OK.
* Make sure you’re up to date with all patches

**Step 2: Begin migration steps from the Office 365 portal**

Go to Users > Data migration > select Exchange. You will be prompted to download and run the Hybrid Configuration Wizard. This must be run from inside the on-premises network where the Exchange server lives, on a domain-joined Windows computer or member server.

**Step 3: Hybrid Configuration Wizard & Azure AD Connect Setup**

Follow the Microsoft instructions to set this up and Minimal Hybrid Configuration, and the option to Synchronize users & passwords one time. Note: When you select Minimal, you are enabling the “Express” migration features,

**Step 4: Add licenses to the users in the cloud**

After you finish setting up the Hybrid Configuration Wizard & Azure AD Connect, activate the licenses for your users before you start any migrations:

Go to Office 365 Portal > Users > select active users > choose Edit next to Product licenses.

* Note: You will have issues if you licensed users before running the HCW and AAD Connect because mail objects will already exist in the cloud when you are only allowed to have 1 mailbox per user at a time between Exchange Online and on-premise in a hybrid scenario. So don’t license users until AFTER the syncronization is finished because Exchange online will be aware of the on-premises mailboxes, so an cloud mailbox will not be created

**Step 5: Begin migrations**

Go to Users > Data migration >, select the users you would like to migrate > click Start Migration. After the migration is complete, the users will have to close and Open outlook and they’ll now be connected to their Exchange Online Mailboxes and re-login

* If you get continuous password prompts in Outlook after migration, go to Control Panel and delete any entries for Outlook or Office products. When you login again make sure to “remember password”

If you have public folders its easiest to Export it to PST and import into O365 and reset the permissions.

**Step 6: Post-migration Tasks**

**A. Update DNS Records**

Go to Office 365 Admin center > Settings > Domains. You’ll needto enter additional DNS records with your domain registrar/service provider. Mail will be now be delivered to Office 365 after these records have been added.

On-premise, open the DNS management console on your AD server. Remove existing (A) records for autodiscover then expand the DNS zone for your external email domain name, and edit or add the CNAME (alias) record for autodiscover, and make it point to: autodiscover.outlook.com. Verify it is working by clearing the DNS cache and pinging autodiscover.yourdomain.com and it should be point to the Office 365 autodiscover servers.

If you have Skype Intune, etc you can add the other DNS records you need for these services now.

**B. Changes to Exchange Server**

To decommission the Exchange server you’ll have a couple of tasks to do before removing it.

* For Exchange 2007/2010

Open the Exchange Management Shell and type the following: Get-ClientAccessServer | Set-ClientAccessServer -AutoDiscoverServiceInternalUri <https://autodiscover.outlook.com>

* Disable Outlook Anywhere by typing in the following: Disable-OutlookAnywhere –Server <ServerName>

**C. Replace SMTP relay function**

If you were using your Exchange server to relay mail from on-premises line of business apps, or from scan-to-email devices, etc. Office 365 can do this for you.

1. From the Exchange Online admin portal, go to Exchange Admin Center > Mail flow > Connectors. Use the “plus” symbol to add a new connector, choose From: Your organization’s email server and To: Office 365. Go through the wizard, specifying the external IP address(es) of your organization under By verifying that the IP address… and clicking the “plus” symbol. You can leave default in the rest of the wizard.
2. Ensure that your spf record in DNS includes spf.protection.outlook.com as well as ip4:<YourExternalIp>:v=spf1 ip4:[ExternalIPAddress] include:spf.protection.outlook.com -all
3. Make sure that your firewall allows SMTP (25) outbound from the device(s) that require access to the connector.
4. On the device itself, you will need to change the SMTP or smarthost address from the internal Exchange server’s IP to the host of your MX record (ie.. companyinc-com.mail.protection.outlook.com). Ping this address to obtain an IP if the device only accepts inputs of IP rather than hostnames.

**D. Remove Exchange Server**

You can now follow uninstall procedures for Exchange.

**Final Notes: Now that you’re done with this Migration You can choose one of the following methods to manage users.**

1. Cloud-only: Just remove your Exchange server after the migration is over. You can then manage new users, passwords, etc. in the cloud through the Office 365 portal (no more connection with on-premises accounts)
2. Microsoft Essentials Dashboard Integration: Enable this integration to synchronize passwords and have on-premises tools for administering users & mailboxes, without an Exchange Server.
3. Azure AD Connect: This tool can be installed and activated again if you so choose, which also requires a long-term on-premises Hybrid Exchange server to remain in place. This will synchronize passwords or allow you to choose other options such as Single Sign-On.