**How to Perform a Cut-Over Office 365 Migration**

**Step 1. Prepare for the migration**

1. Sign up for an Office 365 account and have your global administrator account ready
2. Have a good backup before making any changes–for Active Directory as well as Exchange
3. Ensure your source server has the latest service packs / updates
4. Run Best Practices Analyzers to identify potential issues with existing configuration
5. Any users with more than 15-20 GB mail data should archive old items (e.g. prior to 1-2 years)
6. Review the steps in advance and communicate the plan to stakeholders/end users/etc.

**Step 2. Migrate Exchange data**

There are 2 ways to do this. Creating and Migrating Batch Online and a manual PST export/import. The manual way is the fall back.

**A. Create a Migration Batch Online**

Go to the Exchange admin center in the Office 365 Admin portal. Go to to recipients > migration and find the 3 little dots.

* Go through the wizard to define your on-premises Exchange server as the migration endpoint. Pick Outlook Anywhere since this is a cutover migration.
* After the endpoint is defined, choose the plus symbol and select Migrate to Exchange Online from the drop down.
* Go through the rest of the wizard–you will need to provide the Internet address of your Exchange server as well as credentials for reading the mailbox data. Once you complete the wizard, data will begin to copy. You can return to this portal later on to watch the progress of your sync.

**B. Export Outlook data to .pst files (optional)**

As a rule of thumb you should always have a back up before do anything as big as this. You should have a fail-safe, so you can do the manual way so you can export and import your email, contacts and calendars to an Outlook .pst file:

* Export email, contacts and calendars to Outlook .pst file

(Note: You can use the .pst export/import method to migrate Public Folders also, if needed)

**C. Export other Outlook settings**

Whether you use a migration batch, or do manual .pst export/import, Outlook rules and signatures are not included. User should back up their own rules, signatures and auto-complete lists. This should be done in advance of the cut over date

• Import or Export a set of rules

• Copy / back up your signatures

• Import Auto-Complete List

**Step 3. Finalize the migration batch & activate mailboxes**

If you were able to use the cutover migration batch successfully, the status of your migration batch(es) will say “Synced”. This means the initial synchronization is completed, and deltas will continue to run every 24 hours. You can now cut over your DNS records at any time. Note, depending on when your batches finish and when you cutover mailboxes, there may be some “delayed” mail items, since there is a chance some new messages have been delivered on-premises. Over the next 24 hours, this should get all caught up, so just be sure to set expectations in advance.

* If you haven’t activated your licenses you should make sure this is done. Go to Office 365 Admin center > select your Users > and click Edit product licenses.

**Step 4. Complete the Office 365 Setup and cut-over DNS**

The final steps should be done after hours. You should probably just say email will be unavailable until the morning after he end of the day.

After you have finalized the migration batch, you’re ready to complete the Office 365 setup process you verified your domain.

* Go to the Office 365 Admin center > Settings > Domains to complete your set up. You will need to enter additional DNS records with your domain registrar / service provider.
* After you have added the records, mail will no longer be delivered to your on-premises Exchange server.

**Step 5. Changes to on-premises Active Directory and Exchange**

There may be some changes that need to made On-premises also.

* .If the zones for your Email domain names exist on-premises DNS will need to be updated. You only need to add the autodiscover records for the Email domains, and not for “.local” or “.lan” DNS zones. If you only have a “.local” DNS zone, and no zones for the Internet domain name that you use for Email, you can skip the on-premises DNS update.
* Update DNS Records - Go to the DNS management console on your Active Directory server. If you have existing (A) records for autodiscover, remove them, then expand the DNS zone for your Email domain, and edit or add the CNAME record for autodiscover here: autodiscover.outlook.com. Verify it is working by clearing the DNS cache on the server and then pinging autodiscover.yourdomain.com. It should return a value for one of the Microsoft datacenters, such as nameast, namwest, namnorth, etc.
* If you’re using Skype, Intune, etc, you can add the other DNS records you need now as well but for Exchange Online you’re done

B. There will be different adjustments to your Exchange server depending n which version of Exchange you’re migrating from to ensure that clients no longer attempt to connect to the local server.

Exchange 2007/20100

* Open the Exchange Management Shell and type the following: Get-ClientAccessServer | Set-ClientAccessServer -AutoDiscoverServiceInternalUri <https://autodiscover.outlook.com>.
* Disable Outlook Anywhere you enter the following: Disable-OutlookAnywhere –Server <ServerName>

Exchange 2003

* Open the Exchange System Manager. Expand the tree to find your server, right-click to open Properties, go to the RPC-HTTP tab, and select Not part of an Exchange managed RPC-HTTP topology.

**Step 6: Depending on your mail flow, you may need to add a SMTP relay connector**

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.

**Step 7. Create new Outlook profiles, import data & settings**

A. Outlook clients

Users will now have to setup a new Outlook profile and import the data & settings that were exported earlier. You should provide instructions on the following things they need to do:

1. Create an Outlook profile
2. Outlook email setup
3. Import email, contacts and calendars from an Outlook .pst file (if needed)
4. Import or Export a set of rules (if needed)
5. Copy email signatures to another computer (if needed)
6. Import Auto-Complete List (if needed)

B. Public Folders (if needed)

If you have Public Folders and exported it to PST, you’ll need to create a Public Folder mailbox in Exchange admin center first, before importing it to Office 365. Go to Exchange admin center > public folders > public folder mailboxes.

**Step 8. Reconfigure mobile devices**

Users will have to reconfigure their mobile devices. Assuming that you set up the auto discover correctly, all they’ll have to do is remove the email account and set up a new one.

**Step 9. Post-migration tasks**

Now that you are done migrating Email to Office 365, you no longer need your on-premise Exchange server. Follow the procedure to decommission the on-premise exchange environment to clean things up