

## # MZ2POL-03: Assessment and Migration Planning

> **Series:** MZ2POL | **Notebook:** 4 of 8 | **Created:** December 2025

### ## Overview

This notebook guides you through a comprehensive assessment of your current Management Zone implementation and helps you create a detailed migration plan to the new Policies, Boundaries, and Segments model.

### ## Prerequisites

- Completed MZ2POL-01 and MZ2POL-02
- Admin access to Dynatrace environment
- Access to Account Management
- List of current user groups and their MZ assignments


### ## Learning Objectives

By the end of this notebook, you will:

1. Have a complete inventory of your Management Zones
2. Understand the mapping from MZs to new constructs
3. Have a prioritized migration plan
4. Know the risks and mitigation strategies

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### ## 1. Management Zone Inventory


>  **Important:** Management Zone configurations **cannot** be queried via DQL.

>

> **Options for MZ inventory:**

- > 1. **Dynatrace UI (Recommended):** Settings → Management Zones
- > 2. **SDK Analysis:** See **MZ2POL-00: SDK Management Zone Analysis Tool** for comprehensive analysis including rule patterns, coverage metrics, and migration readiness.

#### ### Entity Distribution Across MZs

>  **Limitation:** DQL queries against `managementZones` may not accurately reflect the full MZ entity distribution due to how MZ rules propagate. For accurate counts, use the **classic Dynatrace UI** which shows entity counts directly on each Management Zone configuration.

The query below provides an approximation of entity distribution:

```

```python
// Service distribution by Management Zone
fetch dt.entity.service
| expand mz = managementZones
| summarize serviceCount = count(), by:{managementZone = mz}
| sort serviceCount desc
| limit 25
```

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## 2. MZ Pattern Classification

### Categorize Your Management Zones

Group your MZs by their primary purpose:

#### Category 1: Team/Ownership Based
- Pattern: MZs named after teams (e.g., "Team-Frontend", "Platform-Team")
- Migration: → Security Context + Policies + Boundaries
- Priority: High (affects user access)

#### Category 2: Environment Based
- Pattern: MZs for environments (e.g., "Production", "Staging", "Development")
- Migration: → Boundaries with environment conditions
- Priority: High (critical for access separation)

#### Category 3: Geographic/Region Based
- Pattern: MZs for regions (e.g., "NA-East", "EU-West", "APAC")
- Migration: → Segments with cloud region/location filters
- Priority: Medium (primarily filtering)

#### Category 4: Application/Service Based
- Pattern: MZs for applications (e.g., "Payment-System", "User-Portal")
- Migration: → Segments with service/application filters
- Priority: Medium (primarily filtering)

#### Category 5: Infrastructure Based
- Pattern: MZs for infrastructure (e.g., "Kubernetes", "Legacy-VMs")
- Migration: → Segments with infrastructure type filters
- Priority: Low (usually informational)

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## 3. Security Context Planning

### Design Your Security Context Strategy

```

Security Context enables entity-level access control. Plan how to tag your entities:

```
Entity Type	Security Context Value	Purpose
Services	`team-{teamname}`	Team ownership
Hosts	`env-{environment}`	Environment separation
Applications	`app-{appname}`	Application isolation
```

### ### Query Entities Without Security Context

Identify entities that need security context assignment:

```
```sql
// Find services without security context
// These need to be tagged before migration
fetch dt.entity.service
| filter isNull(dt.security_context)
| fields entity.name,
        managementZones,
        tags
| limit 50
```
```

```
```sql
// Count entities by security context presence
// Helps estimate security context tagging effort
fetch dt.entity.service
| summarize
    withContext = countIf(isNotNull(dt.security_context)),
    withoutContext = countIf(isNull(dt.security_context))
```
```

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## ## 4. Migration Priority Matrix

### ### Prioritize Based on Impact and Complexity

```
! [Migration Phases]
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```

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| Priority          | Criteria                         | Examples                  |
|-------------------|----------------------------------|---------------------------|
| **P1 – Critical** | Security/compliance requirements | Production access control |
| **P2 – High**     | Actively used for access control | Team-based MZs            |
| **P3 – Medium**   | Used for filtering only          | Region/app MZs            |
| **P4 – Low**      | Informational/rarely used        | Legacy MZs                |

### Risk Assessment

| Risk                   | Likelihood | Impact | Mitigation                   |
|------------------------|------------|--------|------------------------------|
| Users lose access      | Medium     | High   | Parallel running period      |
| Wrong data visible     | Medium     | High   | Thorough testing             |
| Alert routing breaks   | High       | Medium | Update alerts before cutover |
| Dashboard filters fail | Medium     | Low    | Pre-update dashboards        |

## 5. Migration Timeline Template

### Recommended Phases

#### #### Phase 1: Preparation

- [ ] Complete MZ inventory
- [ ] Document current user access patterns
- [ ] Create migration mapping for all MZs
- [ ] Design security context strategy
- [ ] Identify dependencies (alerts, dashboards, APIs)

#### #### Phase 2: Foundation

- [ ] Apply security context to entities
- [ ] Create user groups in Account Management
- [ ] Set up IAM policy structure
- [ ] Create boundary definitions

#### #### Phase 3: Segments

- [ ] Create segments for data filtering
- [ ] Test segment functionality
- [ ] Update dashboards to use segments
- [ ] Validate filtering behavior

#### #### Phase 4: Policy Assignment

- [ ] Bind policies to groups
- [ ] Apply boundaries to policy bindings
- [ ] Test user access (parallel with MZs)
- [ ] Document access verification results

#### #### Phase 5: Cutover

- [ ] Update alerting profiles to use segments
- [ ] Migrate API integrations
- [ ] Remove MZ-based access (RBAC)
- [ ] Monitor for access issues

#### #### Phase 6: Cleanup

- [ ] Verify no MZ dependencies remain
- [ ] Archive MZ configurations
- [ ] Remove unused MZs
- [ ] Update documentation

---

## ## 6. Dependencies Checklist

### ### What References Management Zones?

Before migrating, identify all MZ dependencies:

#### #### Alerting

- [ ] Alerting profiles using MZ filters
- [ ] Problem notifications scoped to MZs



- [ ] Metric events with MZ dimensions

#### #### Dashboards & Reports

- [ ] Dashboards with MZ filters
- [ ] Reports scoped to MZs
- [ ] SLOs using MZ-filtered data

#### #### Integrations

- [ ] API calls with MZ parameters
- [ ] Automation workflows using MZ scopes
- [ ] Third-party integrations filtering by MZ

#### #### Access Control

- [ ] User groups with MZ assignments
- [ ] RBAC roles using MZ restrictions

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## ## Summary

In this notebook, you:

1. **Inventoried** all Management Zones with DQL queries
2. **Classified** MZs by pattern (team, environment, region, etc.)
3. **Created** migration mapping templates
4. **Planned** security context strategy
5. **Prioritized** migration based on risk and impact
6. **Identified** dependencies to address

## ## Deliverables Checklist

- [ ] Complete MZ inventory spreadsheet
- [ ] Migration mapping document for each MZ
- [ ] Security context assignment plan
- [ ] Prioritized migration schedule
- [ ] Risk assessment and mitigation plan
- [ ] Dependencies checklist

## ## Next Steps

Continue to **MZ2POL-04: Policies and Boundaries** to:

- Learn policy syntax and structure
- Create custom policies
- Understand default policy capabilities

## ## Additional Resources

- [Management Zones Documentation]

(<https://docs.dynatrace.com/docs/manage/identity-access-management/permission-management/management-zones>)

- [Upgrade from RBAC to IAM Policies]

(<https://docs.dynatrace.com/docs/manage/identity-access-management/permission-management/manage-user-permissions-policies/advanced/migrate-roles>)

- [Grant Access to Entities with Security Context]

(<https://docs.dynatrace.com/docs/manage/identity-access-management/use-cases/access-security-context>)