

```
# MZ2POL-06: Migration Execution

> **Series:** MZ2POL | **Notebook:** 7 of 8 | **Created:** December 2025

## Overview

This notebook provides a step-by-step guide for executing your migration from Management Zones to Policies, Boundaries, and Segments. It covers the parallel running period, cutover procedures, and rollback strategies.

## Prerequisites

- Completed MZ2POL-01 through MZ2POL-05
- Migration plan document (from MZ2POL-03)
- Policies and boundaries configured (from MZ2POL-04)
- Segments created (from MZ2POL-05)

## Learning Objectives

By the end of this notebook, you will:
1. Know how to execute each migration phase
2. Understand parallel running strategies
3. Be able to perform cutover safely
4. Know how to handle rollback if needed

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## 1. Migration Phase Overview

### Phase Summary

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Phase 1: Foundation Setup
 ↓
Phase 2: Security Context Assignment
 ↓
Phase 3: Policy & Boundary Configuration
 ↓
Phase 4: Segment Creation
 ↓
Phase 5: Parallel Running (MZ + New Model)
 ↓
Phase 6: Cutover
 ↓
Phase 7: Cleanup
```

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```
### Risk Mitigation Strategy

- **Parallel running**: Both systems active simultaneously
- **Phased rollout**: Migrate groups incrementally
- **Rollback capability**: Document how to revert
- **Testing checkpoints**: Verify at each phase
```

2. Phase 1: Foundation Setup

Checklist

- [] Create user groups in Account Management
- [] Document group → MZ mapping
- [] Verify Account Management access
- [] Backup current RBAC configuration

Create User Groups

For each MZ-based access pattern, create a corresponding group:

MZ Access Pattern	New Group Name
Frontend Team MZ	`frontend-team`
Production MZ viewers	`prod-viewers`
SRE full access	`sre-team`

Via Account Management

1. Navigate to **Account Management** → **Identity & Access Management**
2. Select **Group Management**
3. Click **Create group**
4. Configure:
 - **Group name**: Match your naming convention
 - **Description**: Purpose and MZ equivalent
5. Add initial members (or leave empty for now)
6. Click **Save**

3. Phase 2: Security Context Assignment

Why Security Context?

Security context enables entity-level access control with boundaries. Before creating boundaries, entities must have security context assigned.

```
### Query Current Security Context Coverage

```dql
// Check security context assignment status
// Identify entities needing security context
fetch dt.entity.service
| summarize
 total = count(),
 withContext = countIf(isNotNull(dt.security_context)),
 withoutContext = countIf(isNull(dt.security_context))
| fields total, withContext, withoutContext,
 coveragePercent = 100.0 * withContext / total
```
```

```

### ### Assignment Methods

Method	Best For	Automation
Auto-tagging rules	Tag-based assignment	Yes
Settings API	Bulk updates	Yes
UI Settings	Individual entities	No
OneAgent config	Host-level	Yes

### ### Recommended: Tag-Based Security Context

If entities already have team/environment tags, derive security context from tags:

...

Tag: team:frontend → Security Context: team-frontend

Tag: env:production → Security Context: prod-{team}

...

### ### Checklist

- [ ] Identify security context naming strategy
- [ ] Map existing tags to security context values
- [ ] Apply security context to all relevant entities
- [ ] Verify coverage with DQL query
- [ ] Document security context → team/env mapping

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## ## 4. Phase 3: Policy & Boundary Configuration

### ### Verify Policies and Boundaries

Confirm policies and boundaries are created per MZ2POL-04:

- [ ] Default policies identified for each user type
- [ ] Custom policies created where needed
- [ ] Boundary for each access scope (all three domains)
- [ ] Security context conditions configured
- [ ] Boundary naming follows convention
- [ ] Policy and boundary documentation complete

### ### Create Policy Bindings (Parallel Mode)

During parallel running, users have BOTH:

- Existing MZ-based RBAC access
- New policy-based access

**\*\*Important\*\*:** Users should see the same data with both systems.

### ### Binding Process

For each group:

1. Navigate to \*\*Group Management\*\*
2. Select the target group
3. Go to \*\*Permissions\*\* tab
4. Click \*\*Add permission\*\*
5. Configure:
  - \*\*Policy\*\*: Select appropriate policy
  - \*\*Boundary\*\*: Select matching boundary
  - \*\*Environment\*\*: Target environment
6. Click \*\*Save\*\*

### ### Binding Matrix Template

Group	Policy	Boundary	Environment
frontend-team	Dynatrace Standard User	Frontend Team Scope	Production
sre-team	Dynatrace Professional User	All Production	Production
prod-viewers	Dynatrace Viewer	Production Only	Production

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## ## 5. Phase 4: Segment Creation

### ### Verify Segments

Confirm segments are created per MZ2POL-05:

- [ ] Segment for each MZ filtering use case

- [ ] Segment filters tested with DQL
- [ ] Segments shared with appropriate users

### ### Update Dashboards

For dashboards currently using MZ filtering:

1. Open dashboard in edit mode
2. Configure dashboard-level segment
3. Update individual tiles if needed
4. Save and test

### ### Segment Rollout Strategy

Phase	Action
Week 1	Create all segments, test internally
Week 2	Share segments with pilot users
Week 3	Update key dashboards to use segments
Week 4	Communicate segment availability to all users

---

## ## 6. Phase 5: Parallel Running

### ### Duration

Recommended: \*\*2–4 weeks\*\* depending on complexity

```
![Parallel Running]
(
ciIHZpZXdBzg9IjAgMCA4MDAgMzAwIj4KICA8ZGVmcz4KICAgIDxsaw5lYXJHcmFkaWVudCBpZD0
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C8+CiAgICAgIDxzG9wIG9mZnNldD0iMTAwJSIgc3R5bGU9InN0b3AtY29sb3I6I2Q5NzcwNjtzdG
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gaWQ9InBhclNoYWRvdyI+CiAgICAgIDxmZURyb3BTaGFkb3cgZHg9IjEiIGR5PSIxIiBzdGREZXzp
YXRpb249IjIiIGZsb29kLW9wYWdpdHk9IjAuMTUiLz4KICAgIDwvZmlsdGVyPgogIDwvZGVmcz4KC
iAgPCETLSBCYWNrZ3JvdW5kIC0tPgogIDxyZWN0IHdpZHRoPSI4MDAiIGHlaWdodD0iMzAwIiBmaW
xsPSIjZjh0WZhIiByeD0iMTAiLz4KCiAgPCETLSBUaXRsZSAtLT4KICA8dGV4dCB4PSI0MDAiIHk
```

9IjI4IiBmb250LWZhbWlseT0iQXJpYWwsIHNhbnMtc2VyaWYiIGZvbnQtc2l6ZT0iMTgiIGZvbnQt d2VpZ2h0PSJib2xkIiBmaWxsPSIjMzMzIiB0ZXh0LWFuY2hvcj0ibWlkZGxlij5QYXJhbGxlbcBSd W5uaW5nIFN0cmF0Zwd5PC90ZXh0PgogIDx0ZXh0IHg9IjQwMCiGeT0iNDgiIGZvbnQtZmFtaWx5PS JBcmlhbCwgc2Fucy1zZXJpZiIgZm9udC1zaXplPSIxMiIgZmlsbD0iIzY2NiIgdGV4dC1hbmnob3I 9Im1pZGRsZSI+Qm90aCBzeXN0ZW1zIGfjdG12ZSBkdXJpbmcgMi00IHdlZWsgdHJhbnNpdGlvbiBw ZXJpb2Q8L3RleHQ+CgogIDwhLS0gVGltZWxpmbUgLS0+CiAgPGxpmbUgeDE9IjgwIiB5MT0iODUiI HgyPSI3MjAiIHkyPSI4NSIgc3Ryb2tlPSIjZTJl0GYwIiBzdHJva2Utd2lkdGg9IjIiLz4KCiAgPC EtLSBUaW1lbGluZSBtYXJrZXJzIC0tPgogIDxjaXjbGUgY3g9IjgwIiBjeT0iODUiIHI9IjUiIGZ pbGw9IiM2NDc00GIiLz4KICA8dGV4dCB4PSI4MCiGeT0iMTAwIiBmb250LWZhbWlseT0iQXJpYWws IHNhbnMtc2VyaWYiIGZvbnQtc2l6ZT0iMTAiIGZpbGw9IiM2NDc00GIiIHRleHQtYW5jaG9yPSJta WRkbGUIPlN0YXJ0PC90ZXh0PgokICA8Y2lyY2x1IGN4PSIy0DAiIGN5PSI4NSIgcj0iNSIgZmlsbD 0iIzY0NzQ4YiIvPgogIDx0ZXh0IHg9IjI4MCiGeT0iMTAwIiBmb250LWZhbWlseT0iQXJpYWwsIHN hbnMtc2VyaWYiIGZvbnQtc2l6ZT0iMTAiIGZpbGw9IiM2NDc00GIiIHRleHQtYW5jaG9yPSJtaWRk bGUIPlldlZWsgMTwvdGV4dD4KCiAgPGNpcmNsZSBjeD0iNDgwIiBjeT0iODUiIHI9IjUiIGZpbGw9I iM2NDc00GIiLz4KICA8dGV4dCB4PSI00DAiIHk9IjEwMCiGZm9udC1mYW1pbHk9IkFyaWFsLCBzYW 5zLXNlcmlmIiBmb250LXNpemU9IjEwIiBmaWxsPSIjNjQ3NDhiIiB0ZXh0LWFuY2hvcj0ibWlkZGx lIj5XZWVrIDItMzwvdGV4dD4KCiAgPGNpcmNsZSBjeD0iNjAwIiBjeT0iODUiIHI9IjUiIGZpbGw9 IiNlZjQ0NDQilZ4KICA8dGV4dCB4PSI2MDAiIHk9IjEwMCiGZm9udC1mYW1pbHk9IkFyaWFsLCBzY W5zLXNlcmlmIiBmb250LXNpemU9IjEwIiBmaWxsPSIjZwy0NDQ0IiB0ZXh0LWFuY2hvcj0ibWlkZG xlIj5DdXRvdmVyPC90ZXh0PgokICA8Y2lyY2x1IGN4PSI3MjAiIGN5PSI4NSIgcj0iNSIgZmlsbD0 iIzIyYzU1ZSiVPgogIDx0ZXh0IHg9IjcyMCiGeT0iMTAwIiBmb250LWZhbWlseT0iQXJpYWwsIHNh bnMtc2VyaWYiIGZvbnQtc2l6ZT0iMTAiIGZpbGw9IiMyMmM1NWuiIHRleHQtYW5jaG9yPSJtaWRkb GUIPkNvbXBsZXRLPC90ZXh0PgokICA8IS0tIE1aIFRyYWNrIChkZWNyZWFzaW5nKSAtLT4KICA8dG V4dCB4PSI1MCiGeT0iMTM1IiBmb250LWZhbWlseT0iQXJpYWwsIHNhbnMtc2VyaWYiIGZvbnQtc2l 6ZT0iMTAiIGZvbnQtd2VpZ2h0PSJib2xkIiBmaWxsPSIjZdk3NzA2Ij5NwnM8L3RleHQ+CiAgPHJ1 Y3QgeD0iODAiIHk9IjEyMCiGd2lkdGg9IjUyMCiGaGVpZ2h0PSIyNSIgcng9IjQiIGZpbGw9InVyb CgjbXpBY3RpdmVHcmFkKSIgZmlsdGVyPSJ1cmwoI3Bhc1NoYWRvdykiLz4KICA8dGV4dCB4PSIzND AiIHk9IjEzNyIgZm9udC1mYW1pbHk9IkFyaWFsLCBzYW5zLXNlcmlmIiBmb250LXNpemU9IjEwIiB maWxsPSJ3aGl0ZSiGdGV4dC1hbmnob3I9Im1pZGRsZSI+TWFuYWdlbwVudCBab25lcyBBY3RpdmUg KENsYXNzaWMgQXBwcyk8L3RleHQ+CgogIDwhLS0gRmFkZSBvdXQgLS0+CiAgPHJ1Y3QgeD0iNjAwI iB5PSIxMjAiIHdpZHRoPSIxMjAiIGHlaWdodD0iMjUiIHJ4PSI0IiBmaWxsPSIjZmVmM2M3IiBzdH Jva2U9IiNmNTllMGIiIHN0cm9rZS13aWR0aD0iMSIgc3Ryb2tlLWRhc2hhcnJheT0iNCwyIi8+CiA gPHRleHQgeD0iNjYwIiB5PSIxMzciIGZvbnQtZmFtaWx5PSJBcmhbCwgc2Fucy1zZXJpZiIgZm9u dC1zaXplPSIxMCiGZmlsbD0iIzkyNDawZSiGdGV4dC1hbmnob3I9Im1pZGRsZSI+UmV0aXJpbmc8L 3RleHQ+CgogIDwhLS0gTmV3IE1vZGVsIFRyYWNrIChpbmNyZWFzaW5nKSAtLT4KICA8dGV4dCB4PS I1MCiGeT0iMTgwIiBmb250LWZhbWlseT0iQXJpYWwsIHNhbnMtc2VyaWYiIGZvbnQtc2l6ZT0iMTA iIGZvbnQtd2VpZ2h0PSJib2xkIiBmaWxsPSIjMTZhMzRhIj50Zxc8L3RleHQ+CgogIDwhLS0gUmFt cCB1cCATLT4KICA8cmVjdCB4PSI4MCiGeT0iMTY1IiB3aWR0aD0iMjAwIiBoZWlnaHQ9IjI1IiBye D0iNCIgZmlsbD0iI2QxZmFlNSIgc3Ryb2tlPSIjMjjNTVlIiBzdHJva2Utd2lkdGg9IjEiIHN0cm 9rZS1kYXNoYXJyYXk9IjQsMiIvPgogIDx0ZXh0IHg9IjE4MCiGeT0iMTgyIiBmb250LWZhbWlseT0 iQXJpYWwsIHNhbnMtc2VyaWYiIGZvbnQtc2l6ZT0iMTAiIGZpbGw9IiMwNDc4NTciIHRleHQtYW5j aG9yPSJtaWRkbGUIPlRlc3Rpbmc8L3RleHQ+CgogIDxyZWN0IHg9IjI4MCiGeT0iMTY1IiB3aWR0a D0iNDQwIiBoZWlnaHQ9IjI1IiByeD0iNCIgZmlsbD0idXjsKCNUZxdBY3RpdmVHcmFkKSIgZmlsdG VyPSJ1cmwoI3Bhc1NoYWRvdykiLz4KICA8dGV4dCB4PSI1MDAiIHk9IjE4MiIgZm9udC1mYW1pbHk 9IkFyaWFsLCBzYW5zLXNlcmlmIiBmb250LXNpemU9IjEwIiBmaWxsPSJ3aGl0ZSiGdGV4dC1hbmnob3I9Im1pZGRsZSI+UG9saWNPzXMgKyBCb3VuZGFyaWVzICsgU2VnbwVudHMgQWn0aXZlPC90ZXh0P goKICA8IS0tIEN1dG92ZXIgbGluZSAtLT4KICA8bGluZSB4MT0iNjAwIiB5MT0iMTEwIiB4Mj0iNj AwIiB5Mj0iMjAwIiBzdHJva2U9IiNlZjQ0NDQIiHN0cm9rZS13aWR0aD0iMiIgc3Ryb2tlLWRhc2h

```

hcnJheT0iNSwzIi8+CiAgPHJlY3QgeD0iNTcwIiB5PSIxOTUiIHdpZHRoPSI2MCiGaGVpZ2h0PSIy
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DkiIGZvbnQtZmFtaWx5PSJBcmlhbCwgc2Fucy1zZXJpZiIgZm9udC1zaXplPSIxMCiGZm9udC13ZW
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GxlIj5UcmFpbB1c2VyczwvdGV4dD4KPC9zdmcc+Cg==)

```

### ### During Parallel Running

System	Status	User Experience
Management Zones	Active	Users see MZ-filtered data
Policies + Boundaries	Active	Access control via ABAC
Segments	Active	Users can select segments

### ### Validation Queries

Compare data visibility between systems:

```

```dql
// Compare: Services visible via MZ
// Run as user with MZ access
fetch dt.entity.service
| filter in(managementZones, {"Frontend-Team"})
| summarize mzServiceCount = count()
```

```

```

```dql
// Compare: Services visible via Segment
// Should match MZ count
fetch dt.entity.service
| filter matchesValue(tags, "team:frontend")
| summarize segmentServiceCount = count()

```

```

### ### Parallel Running Checklist

- [ ] All groups have policy bindings
- [ ] Users added to new groups
- [ ] Segments available and shared
- [ ] Dashboards updated (optional in parallel phase)
- [ ] Test users verify equivalent access
- [ ] Document any discrepancies

### ### Issue Tracking

Track issues during parallel running:

| Issue   | MZ Behavior            | New Model Behavior    | Resolution                             |
|---------|------------------------|-----------------------|----------------------------------------|
| Example | Users see 100 services | Users see 95 services | Missing security context on 5 services |

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## ## 7. Phase 6: Cutover

### ### Cutover Prerequisites

- [ ] Parallel running completed successfully
- [ ] All discrepancies resolved
- [ ] User training completed
- [ ] Communication sent to stakeholders
- [ ] Rollback plan documented

### ### Cutover Steps

#### #### Step 1: Update Dependencies

Before removing MZ access:

- [ ] Alerting profiles: Update to use segments (when available)
- [ ] API integrations: Update to use new access model
- [ ] Automation workflows: Verify still functional

#### #### Step 2: Remove RBAC MZ Assignments

For each user/group:

1. Navigate to user/group management
2. Remove MZ-based permission assignments

```
3. Verify policy-based access still works
```

```
Step 3: Verify Access
```

For each user type:

1. Log in as test user
2. Verify expected data access
3. Verify restricted data not accessible
4. Document verification result

```
Step 4: Monitor
```

For 24–48 hours after cutover:

- Monitor for access issues
- Check support tickets
- Verify critical workflows

```
Cutover Communication Template
```

```

Subject: Dynatrace Access Model Migration – Cutover Complete

Team,

We have completed the migration from Management Zones to the new Policies/Boundaries/Segments access model.

What changed:

- Access is now controlled via IAM Policies
- Data filtering uses Segments (select in app header)
- Management Zone filters no longer work in new apps

Action required:

- Select your team's Segment when using Logs, Traces, Services apps
- Report any access issues to [contact]

Documentation: [link to internal docs]

Questions? Contact [team/channel]

```

---

```
8. Phase 7: Cleanup
```

```
Post-Cutover Cleanup
```

```
After successful cutover (recommended: wait 2+ weeks):
```

```
Step 1: Archive MZ Configuration
```

- Export MZ settings via API
- Store in version control or documentation
- Document MZ → new model mapping

```
Step 2: Remove Unused MZs
```

```
Caution: Only remove MZs no longer referenced anywhere
```

- [ ] Verify no alerting profiles use MZ
- [ ] Verify no API integrations use MZ
- [ ] Verify no dashboards rely on MZ filtering
- [ ] Delete MZ via Settings

```
Step 3: Update Documentation
```

- [ ] Update internal runbooks
- [ ] Update onboarding documentation
- [ ] Archive MZ-related documentation
- [ ] Create new model reference guide

```

```

## ## 9. Rollback Procedures

### ### When to Rollback

- Critical access issues affecting multiple users
- Data visibility significantly different than expected
- Business-critical workflows broken

### ### Rollback Steps

#### #### Quick Rollback (During Parallel Running)

1. Communicate rollback to users
2. Instruct users to use MZ filtering (classic apps)
3. Investigate and resolve issues
4. Re-attempt cutover when ready

#### #### Full Rollback (After Cutover)

1. Re-enable RBAC MZ assignments
2. Communicate to users

3. Document what went wrong
4. Create remediation plan
5. Schedule new cutover date

#### ### Rollback Checklist

- [ ] Identify affected users/groups
- [ ] Re-apply MZ-based RBAC
- [ ] Verify access restored
- [ ] Communicate status
- [ ] Document root cause

---

#### ## 10. Migration Verification Queries

##### ### Final Verification

```
```dql
// Verify: Security context coverage is complete
fetch dt.entity.service
| summarize
    total = count(),
    withContext = countIf(isNotNull(dt.security_context))
| fields total, withContext,
    coveragePercent = 100.0 * withContext / total
| filter coveragePercent < 100
```

```

```
```dql
// Verify: Entities accessible via segment match MZ
// Adjust filters to match your environment
fetch dt.entity.service
| summarize
    viaMZ = countIf(arraySize(managementZones) > 0),
    viaTag = countIf(isNotNull(tags))
| fields viaMZ, viaTag
```

```

---

#### ## Summary

In this notebook, you learned:

1. \*\*Migration phases\*\*: Foundation → Security Context → Policies → Segments  
→ Parallel → Cutover → Cleanup
2. \*\*Parallel running\*\*: How to run both systems simultaneously

3. **\*\*Cutover process\*\*:** Step-by-step cutover with verification
4. **\*\*Rollback procedures\*\*:** How to revert if needed

## ## Next Steps

Continue to **\*\*MZ2POL-07: Validation and Troubleshooting\*\*** to:

- Validate migration success
- Troubleshoot common issues
- Perform ongoing maintenance

## ## Additional Resources

- [Upgrade from RBAC to IAM Policies]  
(<https://docs.dynatrace.com/docs/manage/identity-access-management/permission-management/manage-user-permissions-policies/advanced/migrate-roles>)
- [Management Zones Documentation]  
(<https://docs.dynatrace.com/docs/manage/identity-access-management/permission-management/management-zones>)
- [Grant Access to Dynatrace]  
(<https://docs.dynatrace.com/docs/manage/identity-access-management/use-cases/access-platform>)