

## # 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

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Phase 2: Security Context Assignment

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Phase 3: Policy & Boundary Configuration

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Phase 4: Segment Creation

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Phase 5: Parallel Running (MZ + New Model)

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Phase 6: Cutover

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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

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## ## 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**

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## ## 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 |

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## ## 6. Phase 5: Parallel Running

### ### Duration

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

```
! [Parallel Running]
```

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[illegible]

hcnJheT0iNSwzIi8+CiAgPHJlY3QgeD0iNTcwIiB5PSIx0TUiiHdpZHRoPSI2MCIgaGVpZ2h0PSIy  
MCIGcng9IjQiIGZpbGw9InVybcGjY3V0b3ZlckdyYWQpIi8+CiAgPHRleHQgeD0iNjAwIiB5PSIyM  
DKiIGZvbnQtZmFtaWx5PSJBcmllhbCwgc2Fucy1zZXJpZiIgZm9udC1zaXplPSIxMCIGZm9udC13ZW  
lnaHQ9ImJvbGQiIGZpbGw9IndoaXRlIiB0ZXh0LWFuY2hvcj0ibWlkZGxLIj5DdXRvdmVyPC90ZXh  
0PgoKICA8IS0tIFZhbkYXRpb24gYWN0aXZpdGllcyAtLT4KICA8cmVjdCB4PSIzMCIgeT0iMjMw  
IiB3aWR0aD0iNzQwIiBoZWlnaHQ9IjU1IiByeD0iOCIGZmlsbD0iI2ZmZiIgc3Ryb2t1PSIjZTJlO  
GYwIiBzdHJva2Utd2lkdGg9IjEiLz4KICA8dGV4dCB4PSI0MDAiIHk9IjI1MCIGZm9udC1mYW1pbH  
k9IkFyaWFsLCBzYW5zLXNlcmMlIiBmb250LXNpemU9IjExIiBmb250LXdlawdodD0iYm9sZCIgZml  
sbD0iIzMyIgdGV4dC1hbmNob3I9Im1pZGRsZSI+UGFyYWxsZWwgUnVubmluZyBBY3Rpdml0aWVz  
PC90ZXh0PgogIDx0ZXh0IHg9IjEyMCIGeT0iMjcwIiBmb250LWZhbnWlseT0iQXJpYWwsIHhbnMtc  
2VyaWYiIGZvbnQtZmFtaWx5PSJBcmllhbCwgc2Fucy1zZXJpZiIgZm9udC1zaXplPSIxMCIGZml  
sbD0iIzY0NzQ4YiIgdGV4dC1hbmNob3I9Im1pZGRsZSI+RG9jdW1lbnQgZGZlY3JlcGFuY2llc  
zwvdGV4dD4KICA8dGV4dCB4PSI2NDAlIiHk9IjI3MCIGZm9udC1mYW1pbHk9IkFyaWFsLCBzYW5z  
LXNlcmMlIiBmb250LXNpemU9IjEwIiBmaWxsPSIjNjQ3NDhiIiB0ZXh0LWFuY2hvcj0ibWlkZGxLI  
j5UcmFpbjB1c2VyczwvdGV4dD4KPC9zdmc+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:

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

```
```sql
// 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
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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

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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]

...

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### ## 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

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## ## 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

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## ## 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
```
```

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## ## 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 **MZ2P0L-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>)