



**BINARY TREE**  
Powering Enterprise Transformations®

# Power365®

Quick Start Guide

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This *Quick Start Guide* will give you an overview of the steps to successfully completing your migration project. The first step in any project is to choose your project type from the opening Power365 screen. Choose your Project Type, then jump to that section of this Quick Start guide.

## Project Types

### What is a Power365 Project?

A project in Power365 allows you to configure and manage a subset of features, services and capabilities related to specific environments and/or user groups. There are 3 Power365 project types to choose from.

- Basic Migration Project
- Advanced Migration Project
- Premium Integration Project

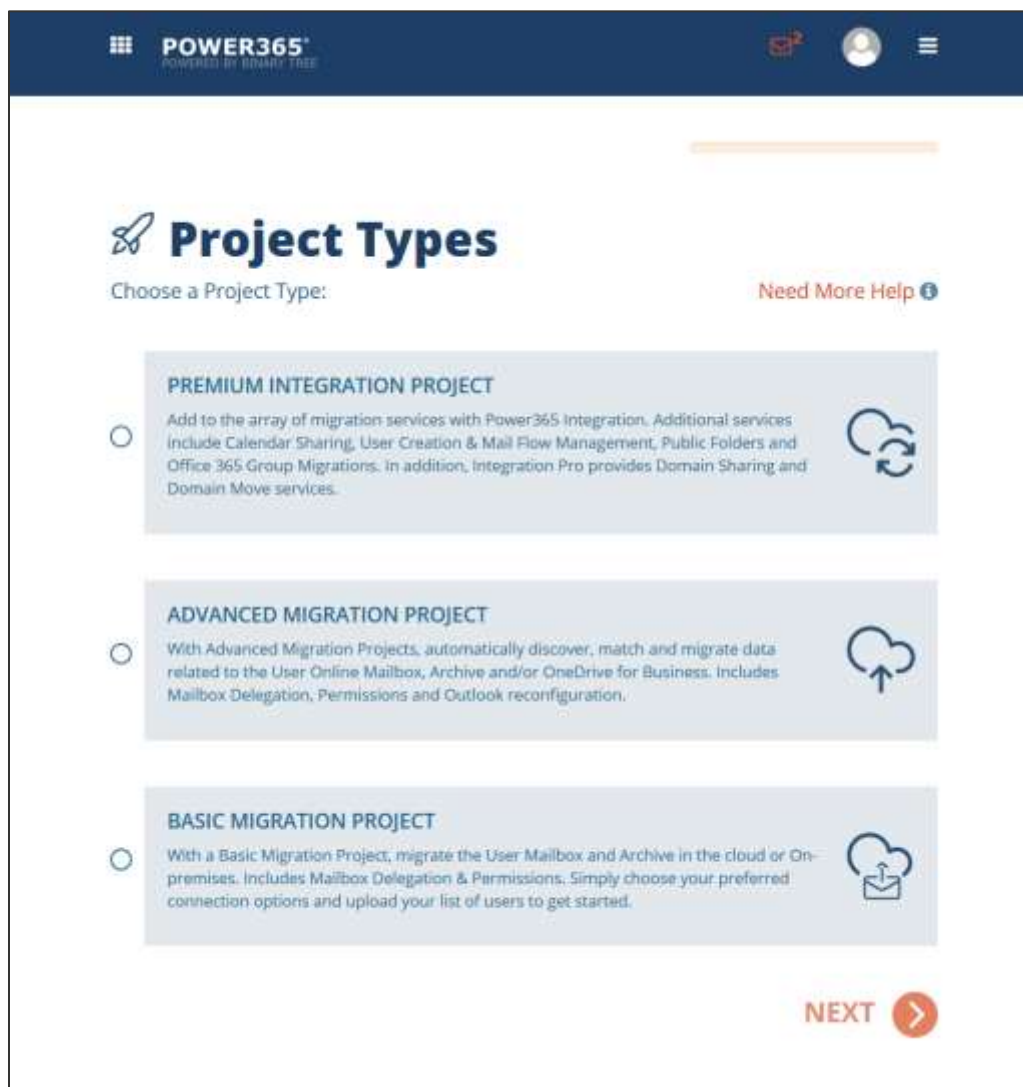











Figure 1: Create New Project Example Page

The following information provides details on the features available for each project type. Some features are optional and may require additional license types. Optional features are indicated by the .

## Basic Migration Project

With a Basic Migration Project, migrate the User Mailbox and Archive in the cloud or On-premises. Includes Mailbox Delegation & Permissions. Simply choose your preferred connection options and upload your list of users to get started.

Features	Basic
Basic Authentication	
Modern Authentication	
Online Mailbox	
On-Premises Mailbox	
Online & On-Premises Archive Mailbox	
Mailbox Delegates	
Mailbox & Folder Permissions	
Manage Users with Mapping File	

### What is Basic Authentication?

Basic Authentication is one of the connection methods allowed in a Basic migration project. Basic Authentication uses single factor authentication where your environment account name and password are securely stored in the environment connection details which will be used to access assigned environment resources for the purposes of data migrations.

### What is Modern Authentication?

Modern Authentication is the other connection method allowed in all migration project types. Modern Authentication offers a more secure and integrated login experience. OAuth 2.0 provides a seamless, two-factor authentication method across different platforms and applications. OAuth 2.0 is the most secure data sharing standard on the market. The two-factor nature and use of tokenization prevents the single factor disclosure of accounts.

Other advantages of using OAuth is the native support of Multi-Factor Authentication (MFA) when accessing the app and the support for delegated app permissions where the Power365 app is granted permission to the designated resources for the purposes of migration and optionally, integration services.

It's easier to manage, more secure and built-in to your existing identify management controls and policies. Modern Authentication is the recommended connection method.

## Is Modern Authentication required for Exchange Online?

Yes. All Power365 project types (excluding Basic Projects using the Basic Authentication option) take advantage of Modern Authentication to help manage your projects. Modern Authentication is the default behavior for all Office 365 tenants. Unless it was disabled, no action is required. However, we recommend the following configuration parameter is validated prior to deployment.

```
Get-OrganizationConfig | Format-Table Name,OAuth* -Auto
```







If Modern Authentication is disabled it must be enabled prior to any migration activities can proceed. To enable Modern Authentication for Exchange Online, run this command under the correct authority.





```
Set-OrganizationConfig -OAuth2ClientProfileEnabled:$true
```

Here is some additional information about how to [Enable modern authentication in Exchange Online](#).

## Advanced Migration Project

With Advanced Migration Projects, automatically discover, match and migrate data related to the User Online Mailbox, Archive and/or OneDrive for Business. Includes Mailbox Delegation, Permissions and Outlook reconfiguration.

Features	Advanced
Basic Authentication	
Modern Authentication	
Online Mailbox	
On-Premises Mailbox	
Online Archive Mailbox	
Mailbox Delegates	
Mailbox & Folder Permissions	
Automatic Outlook Cutover	

<b>Customizable End-User Cutover Email</b>	
<b>Automatic Discovery &amp; Reporting</b>	
<b>Automatic Matching &amp; Mapping</b>	
<b>OneDrive for Business &amp; OneNote</b>	

## Premium Integration Project

Add to the array of migration services with Power365 Integration. Additional services include Calendar Sharing, User Creation & Mail Flow Management, Public Folders and Office 365 Group Migrations. In addition, Premium Integration provides Domain Sharing and Domain Move services.

<b>Features</b>	<b>Premium</b>
<b>Basic Authentication</b>	
<b>Modern Authentication</b>	
<b>Online Mailbox</b>	
<b>On-Premises Mailbox</b>	
<b>Online Archive Mailbox</b>	
<b>Mailbox Delegates</b>	
<b>Mailbox &amp; Folder Permissions</b>	
<b>Automatic Outlook Cutover</b>	
<b>Customizable End-User Cutover Email</b>	
<b>Automatic Discovery &amp; Reporting</b>	
<b>Automatic Matching &amp; Mapping</b>	

<b>OneDrive for Business &amp; OneNote</b>	
<b>Public Folders</b>	
<b>Office 365 Groups</b>	
<b>User Provisioning</b> (Create, Update & License)	
<b>Calendar Sharing</b> (Free/Busy)	
<b>Mail Flow Management</b> (Before & After Migration)	
<b>Directory Sync Services</b> (Supports Azure & AD)	
<b>Domain Sharing Day 1</b> (New Domain Before Migration)	
<b>Domain Sharing Day 2</b> (Original Domain After Migration)	
<b>Long-Term Domain Sharing</b> (Day 1 with No Migrations)	
<b>Domain Move Services with Zero Email Downtime</b>	

## How do I create a new Project?

To create a new project, follow these steps:

1. Login to <https://power365.binarytree.com/>.
2. Click on Migrate and Integrate on the homepage.
3. Click New Project to open the start of a project.
4. Select which type of project you would like to create. See figure 1 above.
5. If a project option is not available, this means you do not have the required licenses.
6. To verify your licenses, login as a client administrator to Power365 then click here to open the Licensing management page.
7. To request additional licenses, contact Binary Tree Support or your local sales account executive.
8. Once the project type is selected, click Next to begin the project. Follow the wizard which will guide you through the setup process.
9. Follow the project wizard until it is complete.



## Additional Information

The online help system and video tutorials can be accessed outside the Power365 interface at <https://help.binarytree.com/power365/default.htm> and outside the Power365 Directory Sync interface at <https://help.binarytree.com/power365/dirsync/default.htm>.

# The *Basic Migration* Project Type

## Get ready

This is an overview, so please refer to the Power365 Prerequisites document for full details. You will need to provide at least one Application Service Account dedicated to Power365 Project Management or an existing account. You will also need at least one available license (E1 minimum) for destination tenants.

For the best application experience, it is recommended to use the Global Administrator role for this account. However, the Global Administrator role is only required during the initial Project setup, reconnections to the tenant or during a Domain Cutover event, where more authority is required.

During project setup, one Cloud-only Binary Tree PowerShell account will be automatically created and assigned the Exchange and SharePoint Administrator roles. One available Office 365 license (E1 minimum) is automatically assigned for destination tenants.

Please note that this account will automatically be assigned the Global Administrator role at the start of a Domain Cutover event, where more authority is required to complete the process.

Pre-create the mailboxes in the target. (NOTE: This step is only required for *Basic Migration* or *Advanced Migration*.)

Plan your Migration Waves ahead of time, if possible. A Migration Wave is a logical grouping of users that you will act against at the same time. For example, if you plan to migrate a subset of users in September, you might make a Migration Wave called *September*. For *Basic Migration*, you can do this by completing the Migration Wave column in the spreadsheet mentioned below. You always have the option to add them manually at any time.

Plan your Migration Profiles ahead of time, if possible. A migration profile contains instructions about the scope and type of data to be migrated. For example, you could make a profile that only migrates email from the past 30 days. Another profile might include email, calendar entries, and contacts for a specific date range. For *Basic Migration*, you can then complete the Profile Name column in the spreadsheet mentioned below. They will be created for you, and then you can go in and configure each one with your data migration choices. You always have the option to add them manually at any time.

You will need to create a spreadsheet of all source users (in scope for migration) matched to all target users using the Exchange Online User address (e.g. [username@domain.onmicrosoft.com](mailto:username@domain.onmicrosoft.com)). If you fail to include all users in scope for migration during the CSV upload, you risk not translating an email address in a message to reflect the migrated user's new target email address.

This spreadsheet has four columns, the source email address, the target email address, and, optionally, but recommended, the migration wave and profile columns. (During the configuration, we will provide a template that you can download.)

You will upload this spreadsheet during the Configuration wizard.

## Run the Configuration Wizard

Choose *New Project*, then *Basic Migration Project* as the Project Type. Answer the questions as they come up. Here are the areas you will be configuring...

- What do you want to call the project?
- Describe the project in a few words

- Adding tenants. Choose to use Basic Authentication or Modern Authentication for Office 365 tenants. Enter administrator account information for On-Premises Exchange environments.
- Uploading the User List spreadsheet
- Creating an automatic Sync Schedule (if desired)

## Basic Authentication or Modern Authentication

*Basic Authentication* is one of the connection methods for Exchange Online environments. Basic Authentication uses single factor authentication where your environment account name and password are securely stored in the environment connection details which will be used to access assigned environment resources for the purposes of data migrations.

*Modern Authentication* is the other connection method. Modern Authentication offers a more secure and integrated login experience. OAuth 2.0 provides a seamless, two-factor authentication method across different platforms and applications. OAuth 2.0 is the most secure data sharing standard on the market. The two-factor nature and use of tokenization prevents the single factor disclosure of accounts.

Other advantages of using OAuth is the native support of Multi-Factor Authentication (MFA) when accessing the app and the support for delegated app permissions where the Power365 app is granted permission to the designated resources for the purposes of migration and optionally, integration services.

It's easier to manage, more secure and built-in to your existing identify management controls and policies. Modern Authentication is the recommended connection method.

## Correct Any Errors in the Spreadsheet

After you upload the spreadsheet, Power365 will check it for errors. If any errors are found, Power365 will offer you a downloadable copy of the spreadsheet with the errors marked.

Fix the errors, and re-upload the corrected spreadsheet. Repeat the process, if needed, until all users have been imported error-free.

## The Match Game

After uploading, check the *Users* pane in the Dashboard and look for any unmatched users.

Correct the problem by verifying the names in the spreadsheet against the actual accounts in the target to be sure there was not a spelling issue. If not, then you may have missed creating a target account for that user and you will need to create it. You can then re-import the spreadsheet and be sure that all users are matched.

## Configure your Migration Profiles if you listed any in your spreadsheet

If you chose to complete the migration profile column in your spreadsheet, you will now find those profiles in the expanding menu at the top right, under "*Migration Profiles*". They will all be set to the default settings, so you will want to customize each one according to your preferences.

## Get in Sync

Copying the data from the source mailbox account to the target mailbox account is the *Sync* action. The best way to do this is to set up a Sync Schedule. The configuration wizard will offer to do this for you, but you can create Sync Schedules manually from the Dashboard. A sync schedule consists of a start date, an interval (i.e. every 3 days), and a frequency (how many sync cycles). You can make as many Sync Schedules as you need.

You can tie a sync schedule to a Migration Wave, which is probably the easiest method. Or, you can select users manually and choose *Sync* from the action menu. A single mailbox can be synced an unlimited number of times. However, there is a 100-sync throttling policy. The policy can be adjusted if required, upon a valid request to Binary Tree Support.

Whatever sync method that you choose, pick your users and sync their data.

## Cutover

When it is time for this user to start using the new mailbox in the target, you choose the *Cutover* action. You can apply this to a Migration Wave, or select users individually.

This will provide the user the ability to run the Outlook Configurator, which is a Power365 executable that can automatically reconfigure their Outlook profile.

A final sync will also be performed.

# The *Advanced Migration* Project Type

## Get ready

This is an overview, so please refer to the Power365 Prerequisites document for full details. You will need to provide at least one Application Service Account dedicated to Power365 Project Management or an existing account. You will also need at least one available license (E1 minimum) for destination tenants.

For the best application experience, it is recommended to use the Global Administrator role for this account. However, the Global Administrator role is only required during the initial Project setup, reconnections to the tenant or during a Domain Cutover event, where more authority is required.

During project setup, one Cloud-only Binary Tree PowerShell account will be automatically created and assigned the Exchange and SharePoint Administrator roles. One available Office 365 license (E1 minimum) is automatically assigned for destination tenants.

Please note that this account will automatically be assigned the Global Administrator role at the start of a Domain Cutover event, where more authority is required to complete the process.

Pre-create the mailboxes in the target. (NOTE: This step is only required for Basic Migration or Advanced Migration.)

Plan your Migration Waves ahead of time, if possible. A Migration Wave is a logical grouping of users that you will act against at the same time. For example, if you plan to migrate a subset of users in September, you might make a Migration Wave called *September*. For *Basic Migration*, you can do this by completing the Migration Wave column in the spreadsheet mentioned below. You always have the option to add them manually at any time.

Plan your Migration Profiles ahead of time, if possible. A migration profile contains instructions about the scope and type of data to be migrated. For example, you could make a profile that only migrates email from the past 30 days. Another profile might include email, calendar entries, and contacts for a specific date range. For *Basic Migration* and *Advanced Migration*, you can then complete the Profile Name column in the spreadsheet mentioned below. They will be created for you, and then you can go in and configure each one with your data migration choices. You always have the option to add them manually at any time.

## Pre-Create some AD groups for Discovery (suggested)

Pre-create some AD Groups for migration scope use. These group(s) may be synchronized from your local AD or be groups that exist in the cloud only. When creating the group, choose *Mail-Enabled, Universal Security group* type. The configuration wizard will be asking you to how you want to choose your users for migration. You can choose All Users, or select by Active Directory Group. By Active Directory group is the better method, so we suggest you make AD groups just for this purpose. Add the users to be migrated to these groups. Multiple groups are supported, so we encourage you to setup each discovery group as your migration wave group. Populate the group membership based on your migration waves. This will provide more granular control over who is in scope for each migration event.

## Run the Configuration Wizard

Choose *New Project*, then *Advanced Migration Project* as the Project Type. Answer the questions as they come up. Here are the areas you will be configuring...

- What do you want to call the project?

- Describe the project in a few words
- Adding tenants
- Choose to upload a user list or use discovery
- Selecting environment pairs
- Selecting domain pairs
- Choosing how to discover users (all users, or by AD group)
- Choose your attributes for matching (Such as *UserPrincipalName*, *Mail...etc.*)
- Creating your Migration Waves (if desired)
- Creating an automatic Sync Schedule (if desired)

## The Match Game

The discovery process will run and pull all the users from the AD groups that you have selected (or all users if that's what you chose).

Now go to the Dashboard and look at the *Users* pane. If there are any users that show *No Match* as the status, you need to fix the issue. The most common fix is to create the missing users in the target.

## Create and Configure some Migration Profiles (optional)

A profile contains instructions about the scope and type of data to be migrated. For example, you could make a profile that only migrates email from the past 30 days. Another profile might include email, calendar entries, and contacts for a specific date range.

In the expanding menu at the top right, open "*Migration Profiles*". Add profiles as desired and configure them as needed. Any Migration Wave that has not been assigned a Migration Profile will use the settings in the *Default* profile.

## Get in Sync

Copying the data from the source mailbox account to the target mailbox account is the *Sync* action. The best way to do this is to set up a Sync Schedule. The configuration wizard will offer to do this for you, but you can create Sync Schedules manually from the Dashboard. A sync schedule consists of a start date, an interval (i.e. every 3 days), and a frequency (how many sync cycles). You can make as many Sync Schedules as you need.

You can tie a sync schedule to a Migration Wave, which is probably the easiest method. Or, you can select users manually and choose Sync from the action menu. A single mailbox can be synced an unlimited number of times. However, there is a 100-sync throttling policy. The policy can be adjusted if required, upon a valid request to Binary Tree Support.

Whatever sync method that you choose, pick your users and sync their data.

## Cutover

When it is time for this user to start using the new mailbox in the target, you choose the *Cutover* action. You can apply this to a Migration Wave, or select users individually. This will provide the user the ability to run the Outlook Configurator, which is a Power365 executable that can automatically reconfigure their Outlook profile.

# The *Premium Integration* Project Type

The *Premium Integration* project type includes the *Email Rewrite Service*, also known as ARS (address rewrite service). *Premium Integration* allows users who have not yet been migrated to send email as if they are already in the target tenant. Or, conversely, you can choose to allow users who are already migrated, to send email as if they are still in the source tenant.

This feature requires a few additional steps, mainly configuring some SSL certificates, and setting up some DKIM records in the public DNS.

## Get ready

This is an overview, so please refer to the Power365 Prerequisites document for full details. You will need to provide at least one Application Service Account dedicated to Power365 Project Management or an existing account. You will also need at least one available license (E1 minimum) for destination tenants.

For the best application experience, it is recommended to use the Global Administrator role for this account. However, the Global Administrator role is only required during the initial Project setup, reconnections to the tenant or during a Domain Cutover event, where more authority is required.

During project setup, one Cloud-only Binary Tree PowerShell account will be automatically created and assigned the Exchange and SharePoint Administrator roles. One available Office 365 license (E1 minimum) is automatically assigned for destination tenants.

Please note that this account will automatically be assigned the Global Administrator role at the start of a Domain Cutover event, where more authority is required to complete the process.

And finally, for Directory Sync Lite, one local Active Directory user service account for each forest or domain is required for the *Premium Integration* project type. This account must have Domain User rights with ability to Create and Modify objects in local Active Directory.

If you plan to also migrate Public Folders, you will need an additional license for each tenant in addition to the licenses already described.

You don't need to create any mailboxes in the target unless you want to, as the *Premium Integration* project type can create the mailboxes for you. (This is what the *Prepare* action does.)

Plan your Migration Waves ahead of time, if possible. A Migration Wave is a logical grouping of users that you will act against at the same time. For example, if you plan to migrate a subset of users in September, you might make a Migration Wave called *September*.

Plan your Migration Profiles ahead of time, if possible. A profile contains instructions about the scope and type of data to be migrated. For example, you could make a profile that only migrates email from the past 30 days. Another profile might include email, calendar entries, and contacts for a specific date range. You can also choose to copy Litigation Hold data as part of a profile.

The Email Rewrite Service of *Premium Integration* requires a single public SSL certificate for one domain from each tenant that has users who will have their email rewritten. (Even if a single tenant has multiple domains, you only need one SSL cert for just one of the domains, it doesn't matter which one. You will choose that domain during configuration.) If you plan to use the *Domain Cutover* feature of Power365, the subject name of the certificate cannot be a domain that you will be moving. If you will be moving all your domains, you will want to create a new "empty" domain as a placeholder and configure that domain as the subject of a new certificate. Please refer to the *Power365 Prerequisites* document for more details if you plan to use the Email Rewrite Service.



## Plan for the installation of Power365 Directory Sync

The *Premium Integration* project type will require the installation of *Power365 Directory Sync* software on a dedicated server located in the source and target Local AD Forests, and must connect to their respective Global Catalog Servers.

It is acceptable for *Power365 Directory Sync* to be installed on a single server only if that server has the proper network access between source and target Domain Controllers.

*Azure AD Connect* or another 3rd party synchronization tool must also be deployed from local AD Forest to Azure AD to allow modifications of the on-premises objects (those that were performed by *Power365 Directory Sync*) to be reflected in Office365.

*Power365 Directory Sync* is a special version of the Binary Tree Directory Sync Pro on-premises product. The hardware and software requirements are the same as the on-premises product including:

- Windows Server 2008 R2 64-bit, or Windows Server 2012 R2 (recommended); US English Operating System
- SQL Server - SQL Server can be a new or existing database. If you choose the "Default Install", *Power365 Directory Sync* will download and install SQL Express 2016 sp2 for you if no SQL server is detected on the machine.

The following SQL Server versions (English versions) are supported:

- SQL Server 2008 R2
- SQL Server 2008 R2 Express with Advanced Services
- SQL Server 2012 SP2
- SQL Server 2012 SP2 Express with Advanced Services
- SQL Server 2014
- SQL Server 2014 Express with Advanced Services
- SQL Server 2016
- SQL Server 2016 Express with Advanced Services
- Outbound port 443 must be open to the following destination:  
<https://power365.binarytree.com/Api/DirSync>

You will be able to download the *Power365 Directory Sync* software during the initial configuration wizard. (You can also re-download at any time from the Power365 Dashboard.)

## Pre-Create some AD groups for Discovery (suggested)

Pre-create some AD Groups for migration scope use. These group(s) may be synchronized from your local AD or be groups that exist in the cloud only. When creating the group, choose *Mail-Enabled, Universal Security group* type. The configuration wizard will be asking you to how you want to choose your users for migration. You can choose All Users, or select by Active Directory Group. By Active Directory group is the better method, so we suggest you make AD groups just for this purpose. Add the users to be migrated to these groups. Multiple groups are supported, so we encourage you to setup each discovery group as your migration wave group. Populate the group

membership based on your migration waves. This will provide more granular control over who is in scope for each migration event.

## Pre-Create some AD Groups for Global Address List sync (if desired)

Power365 can add users from one tenant as contacts in the other so that they appear in the recipient tenants Global Address List even before migration. This is done by adding those users to an Active Directory group. We suggest making an AD group just for this purpose. You can choose to sync from source to target, from target to source, in both directions, or not all. Add the desired users to this group. Keep in mind any users in scope for migration will be setup automatically during the *Prepare* action for GAL visibility. Therefore, only add members to the GAL Sync group if they are not part of the user mailbox migration.

## Pre-Create some AD Groups for Calendar (free\busy) sync (if desired)

Power365 enable specific users to be in scope for availability (free/busy) services between the tenants, if you only want to expose some users to availability services during a divestiture project or provide these services in phases by specific work groups. This is done by adding those users to an Active Directory group. We suggest making an AD group just for this purpose. Add the desired users to this group.

## Run the Configuration Wizard

Choose *New Project*, then *Advanced Migration* as the Project Type. Answer the questions as they come up. Here are the areas you will be configuring...

- What do you want to call the project?
- Describe the project in a few words
- Adding tenants
- Reviewing the tenant “pairs”
- Selecting domains
- Reviewing the domain “pairings”
- Choosing how to discover users (all or by AD group)
- Choose your attributes for matching (Such as *UserPrincipalName*, *Mail...etc.*)
- Deciding if you would like Power365 to create users for those without a match
- Choose how to discover distribution groups (if desired). You will be offered a sample template to fill and upload, or you can do it manually.
- Creating your Migration Waves (if desired)
- Creating an automatic Sync Schedule (if desired)
- Choosing environment pairs to discover Office 365 Groups
- Choosing to create a unified address book (GAL) You will be asked for your AD group for this purpose.
- Choosing to share calendar availability. You will be asked for your AD group for this purpose.
- Do you want to migrate public folders? You will be offered a sample template to fill and upload, or you can do it manually.
- You will be asked to download and install the Power365 Directory Sync application for each tenant in the project. Refer to the “*Installing Power365 Directory Sync Pro*” video for more info.

- *For Premium Integration:* You will be asked if you want to have email rewritten. When you answer “Yes” you will be asked for an SSL certificate for one domain in each tenant that will include users to be “rewritten”.
- *For Premium Integration:* You will be given the DKIM text record information that will need to be published in your public DNS. NOTE: You will not be able to continue until these records are successfully published and propagated. You will get email notifications throughout this process.
- The discovery process will now begin, and you can choose to be emailed when the process is finished.

## The Match Game

The discovery process will run and pull all the users from the AD groups that you have selected (or all users, if that’s what you chose).

Now go to the *Dashboard* and look at the *Users* pane. For any users that show *No Match* as the status, you need to fix the issue. The most common fix is to create the missing users in the target. With the Advanced Migration (and Premium Integration) project types, you can have Power365 do this for you! (This is the *Prepare* action explained below.)

## Populate the Email Rewrite Eligibility Groups as desired.

When you properly configure the Email Rewrite section of the configuration wizard, Power365 will create two Office365 groups for you for this purpose.

If you want users who have not yet been migrated to send email as if they already have been migrated, (the email will appear to come from the target tenant) then add them to the *BT-IntegrationPro-DayONE* Office365 group.

If you want users who have already been migrated (the *Cutover* action has been taken) to send email as if they are still in the source tenant (as if they hadn’t been migrated yet), then add them to the *BT-IntegrationPro-DayTWO* Office365 group.

- CAUTION: If you use this group, you must create and apply a migration profile for any included users to “Hide the Source Mailboxes” so that we can create a contact object during the *Cutover* process. (See the *Cutover* section below)

## “Prepare” for Success

In the Dashboard, select a group of unmatched users, either individually or by Migration Wave. You will then choose the *Prepare* action, and click *Apply Action*.

*Prepare* does the following:

- Creates or Updates the Target User (Based on migration profile)
- Mail-Enables the Target User
- Set Target Address for Forwarding on Target Mailbox to Source Mailbox
- Hide the Target Mail-Enabled User (MEU)
- Create a Target Mail Contact Pointing to the Source Mailbox for Mail and Free/Busy

## Create and Configure some Migration Profiles (optional)

A profile contains instructions about the scope and type of data to be migrated. For example, you could make a profile that only migrates email from the past 30 days. Another profile might include email, calendar entries, and contacts for a specific date range.

In the expanding menu at the top right, open “*Migration Profiles*”. Add profiles as desired and configure them as needed. Now edit the *Migration Waves* pane in the Dashboard and choose the “*Add to Profile*” action for the desired waves. As with any Action Menu choice, you could also just apply the “*Add to Profile*” action to selected individual users, if you didn’t want to use a Migration Wave.

## Get in Sync

The first Sync action executed against a user will provision the mailbox, license the user for Exchange Online and set the appropriate forwarding address to maintain coexistence during Integration projects.

Once the mailbox is established, the Sync will begin copying the data from the source mailbox account to the target mailbox account based on the assigned migration profile.

The best way to do this is to set up a Sync Schedule. The configuration wizard will offer to do this for you, but you can create Sync Schedules manually from the Dashboard. A sync schedule consists of a start date, an interval (i.e. every 3 days), and a frequency (how many sync cycles). You can make as many Sync Schedules as you need.

You can tie a sync schedule to a Migration Wave, which is the easiest method. Or, you can select users manually and choose Sync from the action menu. Whatever sync method that you choose, pick your users and sync their data. A single mailbox can be synced an unlimited number of times. However, there is a 100-sync throttling policy. The policy can be adjusted if required, upon a valid request to Binary Tree Support.

## Cutover

When it is time for this user to start using the new mailbox in the target, you choose the *Cutover* action. You can apply this to a Migration Wave, or select users individually. This will perform several finalization steps, including:

- Perform a final mailbox sync

### Mailbox Cutover Actions: (Target AD)

- Backup *LegacyExchangeDN* of the contact object that was created during the *Prepare* action
- Update & Hide Target Mail Contact
- Move the *LegacyExchangeDN* from the target contact object, and add it to the target mailbox as an x500 address to handle replies
- Unhide Target Mailbox
- Remove Mail Forwarding
- Send Outlook Configurator agent information to source User Mailbox (this is optional, and is one of the Migration Profile choices)
- If any users were added to the “*BT-IntegrationPro-DayONE*” email rewriting group, they will now be removed from the target “*NC*” (for “*Not Cutover*”) group.
- If any users were added to the “*BT-IntegrationPro-DayTWO*” email rewriting group, the source CONTACT object will be added to that group.

#### Mailbox Cutover Actions: (Source AD)

- Hide Source Mailbox (Optional)
- Create Mail Contact for new Target Mailbox (Only if “*Hide Source Mailbox*” was chosen)
- Set Forwarding on Source Mailbox

## Domain Move

Optionally, Power365 can complete the steps required to move the source domain to the target tenant in a process called Domain Move. This feature performs all the tasks that previously had to be performed manually. This includes deprovisioning the domain from a source tenant, adding the new domain to the target tenant and migrating the email addresses associated with the domain. To ensure mail delivery throughout the process, an SMTP relay is automatically provided.

# Learn more about Binary Tree

For more information on Binary Tree, visit us at [www.binarytree.com/company/about-binary-tree](http://www.binarytree.com/company/about-binary-tree).

## Binary Tree Social Media Resources



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