

Migration Guides

Migrate Windows computers - Apps reset only

Valid for version 3.3x

Introduction

This Migration Guides is an aide memoir, and the intended audience is experienced migration Engineers. It does not capture all use cases and scenarios. You may need to tailor your Runbooks and Batch configurations for your particular project and requirements.

Below are the high-level steps that you should review and complete at a minimum to migrate a Windows 10 or 11 workstation that only requires the default Microsoft Apps reset.

This use case typically happens when you are migrating the Microsoft 365 tenant workloads in advance of a device join state migration and will therefore configure the Microsoft Apps for fresh start on the device. Your end state project may be to migrate the devices to a new Active Directory or directly Entra joined in a subsequent phase of your overall project.

USE CASES

- You might have completed an AD-to-AD migration in advance and now need to reset the Apps. This is not a common order of migration.
- You Workstations might not be Hybrid joined and Intune enrolled at all, and you simply need to reconfigure Apps only.

You might be migrating computers from:

SOURCE	TARGET
Active Directory Domain joined with or without Hybrid Entra join. Microsoft apps consumed from source tenant "A"	Do not leave source Active Directory Domain. Microsoft apps consumed from source target "B"

This Migration guide does NOT provide details for switching the Entra device join state.

Typically, as part of this use case you would be also switching workstations from being Hybrid Entra joined in your SOURCE tenant and become Hybrid Entra joined to your TARGET tenant in the same phase of the project. AD to AD.

These instructions should be read in conjunction with the latest Configuration Guide <https://downloads.powersyncpro.com/current/PSPMA-ConfigurationGuide.pdf>

STEPS

Create and Configure Directories

Create your source and target directories that you will be working with. You will need to have created an Entra App Registration in advance for any Microsoft Entra ID Directories. You will need:

- Source AD
- Target AD
- Target Entra ID

You must ensure that you have scoped the Import Object Types to a minimum of Users and computers.

Create a Sync Profile for Migrating Users

You must create at minimum “Match Only” sync profile with correctly scoped users that are your target for Windows workstation App reset Migrations. These are the users that have an active Windows profile on a computer that will require Apps reset.

For Apps reset to happen there must be a User Translation Table, and that is built via the Sync Profiles.

Enable the DirSync Schedule

Configure and enable the sync schedule to ensure that Users and computers will be imported into the PSP Database for you to work with.

Obtain and apply a licence

You will not be able to migrate any workstations without a valid licence. You must be accurate with your domain FQDN and / or Microsoft 365 Tenant information when procuring your licence. Apply the licence at Global Settings\Licences options.

Run an end-to-end DirSync

Be sure that an end-to-end sync cycle has run including Import, Sync and Export

Message Logs

Check the Message Logs for **Warning and Errors**. Confirm or remediate any unmatched users

What If

Confirm the **What If** report has been checked and accepted so that DirSync will run in steady state on the schedule.

Check the Translation Table

Go to the **Translation Table** view (Migration Agent\Reports\Translation Table) and spot check any users that you know are in scope for migration. If your migrating users do NOT appear in the translation table, then **do not migrate their device**. It will **NOT** be re-permissioned.

Single Object Report

Validate your Users and Computers via the single object report to spot check and search for a user or computer you are migrating.

Migration Agent Configuration

Create a pre shared key

The pre-shared key is mandatory requirement for the installation of the Migration Agent on the computer. This sets-up the initial secure channel communication.

Create a Certificate

The private certificate is mandatory requirement for the installation of the Migration Agent on the computer. This ensures that all communication between the workstation and the PowerSyncPro server is secure and encrypted.

Create Runbooks

A Runbook contains all the instructions for the Migration Agent to execute on the computer including the device join state, Intune enrolment, Windows profile repermissioning, application reconfiguration and any pre and post migration scripts.

We advocate only having one primary runbook and one prerequisite Runbook unless you explicitly need to achieve different outcomes for different batches of users and computers. Use your single Runbook and any prerequisite Runbook in any Batches you have, even if they are Early Adopters, Pilot and Main migration waves and events.

Prerequisite Runbook

As the name states, this is a Runbook that must run in advance of your primary Runbook. The main Runbook will not start until the prerequisite runbook has successfully completed.

- **Name:** Choose any meaningful label you like. This will be seen in reports, dashboards and logs. Include the word Pre-Req or Prerequisites in the name for ease.
- **Source Directories:** This should be your source Active Directory and Source Entra Tenant
- **Target Directories:** This should be your target Microsoft 365 Entra Tenant
 - The source and target you choose here controls what Runbooks you can choose for your Batches. You should choose the target to be your target Entra tenant so that the Batch will correctly present the User Translation Table entries.
- **Startup:**
 - **User Interaction** should be set to "Silent Mode"
 - **Do Not Run Startup** should be selected
- **User Experience:** Nothing is required to configure here

- **Device State:** Nothing should be configured here.
 - **Remove From** and **Domain Join** should both be set to "None"
- **Permission Updates:** This should be set to "Don't update permissions" - The computer and its Windows profile will remain domain joined in the source AD.
- **App Reconfiguration:**
 - **Reconfigure applications** should be selected
 - **Make OneDrive Files Cloud Only** should be selected
 - **No other settings are required to be configured**
- **Completion:**
 - **Do Not Run Completion** should be selected

Main Runbook

- **Name:** Choose any meaningful label you like. This will be seen in reports, dashboards and logs.
- **Source Directories:** This should be your source Active Directory and Source Entra Tenant
- **Target Directories:** This should be your target Microsoft 365 Entra Tenant

The source and target you choose here controls what Runbooks you can choose for your Batches. You should choose the target to be your target Entra tenant so that the Batch will correctly present the User Translation Table entries.
- **Prerequisite Runbooks:** This is the Runbook you created earlier. Click the field to choose and select
- **Startup:**
 - **User Interaction** should be set to "Show Progress" and
 - **Do Not Run Startup** should NOT be selected.
 - Be sure to configure an Admin fallback account, any custom pre-migration script(s), Legal Notice, Prevent Login and a Lock Screen image. PowerSyncPro provides a default image if you prefer.
- **User Experience:** You should choose your own wording here for what your end users will see and if you need to create additional languages (Culture). You can accept the defaults. You do not need to configure Cache Credentials
- **Device State:** When resetting the Microsoft default Apps you should ensure that on the device State tab you:
 - **Remove From:** **Entra ID only**. Your computers will stay Domain joined to the current AD
 - **Domain join:** **None**. Your computers will remain domain joined to the source AD
- **Permission Updates:** This should be set to "Don't update permissions" - The computer and its Windows profile will remain domain joined in the source AD.
- **App Reconfiguration:** When migrating from one Microsoft 365 Tenant to another you **MUST Reconfigure applications** to ensure that the migrated user can access all these apps in the target tenant.

- **Completion:** Any post migration script(s)

Create a Batch

Batches contain the list of computers in scope, the Runbooks to execute and the start time and date.

- **Name:** Choose any meaningful label you like. This will be seen in reports, dashboards and logs.
- **Source Directory** is your Source AD
- **Target Directory** should be your Target Microsoft 365 Entra Tenant
- **Available From Time** When selected, the workstation agent shows a dialog notifying the user their migration is ready to run from this date/time onward. The user can start the migration or click Snooze to defer (Snooze is the only way to dismiss the dialog).
 - Typically, for Tenant-to-Tenant migrations you will be performing a cutover migration so you would not use the Available From option.
- **Enforced After Time** The mandatory run time. If the machine is on, no user is logged in, and the PowerSyncPro server is reachable, the migration starts within 15 minutes of this date/time.

For testing and early adopters: You can create your batches with an **Enforced After** date far in advance if necessary but then have the **Available from** closer to your present time to facilitate self-service migrations and testing. For Production migrations you should settle on the actual date you will use.

Batches can have multiple Runbooks. Do not have computers in multiple Batches. Your Batch should include your Prerequisite Runbook and your Main Runbook

Adding a computer to Batch less than 24 hours before migration is unlikely to be successful unless you restart the PowerSyncPro on the Computer. Always ensure that you have a valid and populated Translation Table for your use case.

Confirm a working migration endpoint URL

If you are using IIS with a reverse proxy your endpoint will be https (TCP port 443) using your friendly DNS name and a valid SSL certificate binding. E.g. <https://powersyncpro.contoso.com/Agent>

To test: From an in-scope computer open the browser and connect to the URL this should resolve successfully to a landing page

If you are using the *default installation*, then your endpoint will be the PowerSyncPro server FQDN with TCP port 5000. Typically, this would be only used for your initial end-to-end testing. E.g. <http://pspserver.contoso.local:5000/Agent>

The PowerSyncPro server endpoint URL must be available at the start of the migration to confirm the latest runbooks and scheduling information, and critically to get SID translation data from the server



during the migration. Once the computer migration has started, reporting information such as migration status and logging will be written back to the server.

Agent Installation

The .NET 8.x Desktop Runtime prerequisites must be installed. These can be installed separately in advance or bundled with the complete PSP Migration Agent Installer. It is more common to use the bundled version.

Agent Registration

Confirm that Agents are successfully registering on the PowerSyncPro server by reviewing the Agents view and Failed Communications report.

Checklist

TASK	COMPLETE
Create and configure Directories	
Create and configure Sync Profile for Users and Groups	
Enable the schedule	
Obtain and apply a software licence	
Run an end-to-end Import/Sync/Export	
Check Message Logs for Warnings and Errors	
Confirm the What If report	
Spot check the Translation Table	
Spot check the Single Object Report	

Agent Preparation	COMPLETE
Create a pre shared key and Certificate	
Create Runbooks and Batches – including prerequisite Runbook	
Confirm a working PowerSyncPro server endpoint URL	
Confirm Microsoft 365 tenant Entra join and Intune Enrol settings	
Confirm Agent Installation with prerequisites	
Confirm Agent Registration and profile harvests	
Test with non-production users and computers	

Documentation

We take a lot of pride on the documentation. If you follow the guides, we believe that you should be able to get yourself up and running. <https://powersyncpro.com/documentation>

Knowledge Base

We are regularly adding and updating articles in the Knowledge Base, so also try here as a good resource. <https://kb.powersyncpro.com/>

Support

Support is available from: <https://tickets.powersyncpro.com/>

If you are logging a ticket, be prepared to send the Migration Event Logs plus Windows Application Event logs from the affected computer and the Server / Agent version.