

To ensure you're fully set up and operational in the new environment, please complete the following steps **after the migration is complete**:

**Post-Migration Tasks:**

- Set up Multi-Factor Authentication (MFA) in the new Microsoft tenant – This is the first step and must be completed before you can access M365 services on a web browser, mobile device, or laptop.
- Access M365 via web browser – Provides immediate access to your emails and files; no syncing or caching required.
- Access M365 on a mobile device – Partial syncing/caching will occur during setup.
- Access M365 on a laptop – Full syncing/caching is required. The time needed for this step depends on the size of your mailbox and OneDrive data, so please allow adequate time for synchronization.
- Access Power BI – Ensure you can sign in and access your reports within the new tenant.

**Be sure to download these documents prior to the migration weekend!**

**BT Support Contact Information**

If you need assistance during or after migration, please reach out to BT Support:

- Phone: 855-271-4357
- Email: support@nicepak.com

If you're unable to access your work email after migration, please contact BT Support using your personal email. Be sure to include the following information:

- A brief description of the issue
- Your cell phone number
- Your personal email address

In-Person Support Availability on Monday, 6/16 (8:00 AM – 6:00 PM):

- Woodcliff Lake: BT will be available in the *Training Room*
- Orangeburg: BT will be available in the *Forest Room*

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## Multi-Factor Authentication (MFA) Setup

As part of the migration, you will be prompted to set up Multi-Factor Authentication (MFA) the first time you sign in to M365. You'll have the option to authenticate using either the Microsoft Authenticator app or SMS text messages.

MFA Setup Instructions:

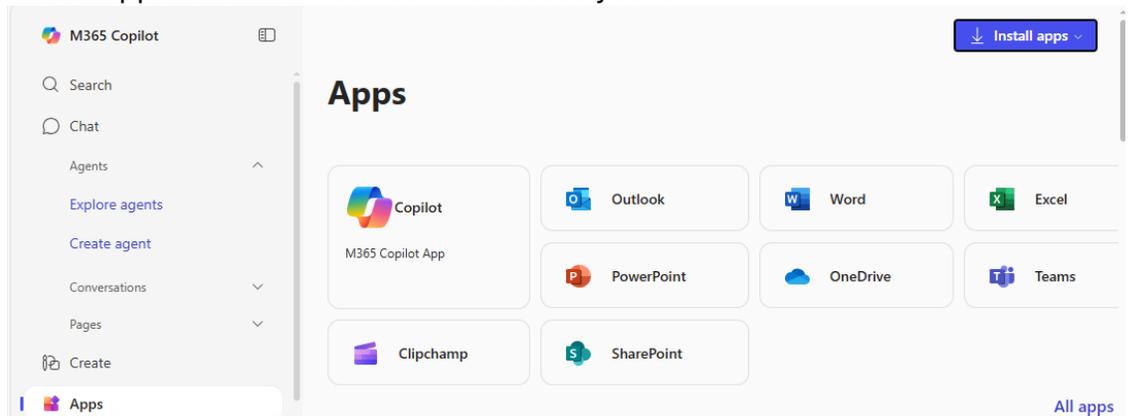
- SMS ([Click here to access instructions](#)) – “MFA Instructions for SMS-Text.docx”
- Microsoft Authenticator app ([Click here to access instructions](#)) – “MFA Instructions for MS Authenticator.docx”

If you need assistance with MFA setup, contact BT Support.

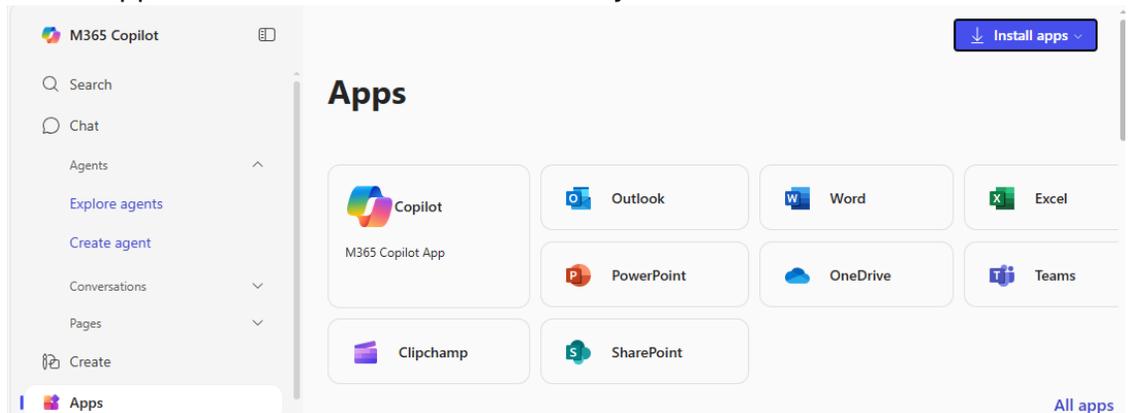
# Accessing M365 via Web Browser

Using a browser is the fastest way to access your data immediately after migration, it does not require caching/sync'ing of email and files:

- Go to <https://www.office.com> and sign in with your PDI email (e.g., @pdipdi.com, @pdihc.co, @saniprofessional.com) and current password.
- From the landing page, open Outlook and confirm recent emails are visible.
  - Press “Apps” and then “Outlook” to access your email



- From the landing page, open OneDrive and confirm files recently updated are visible.
  - Press “Apps” and then “OneDrive” to access your files



## Mobile Device Access

Accessing email, Teams and OneDrive is possible via your mobile device:

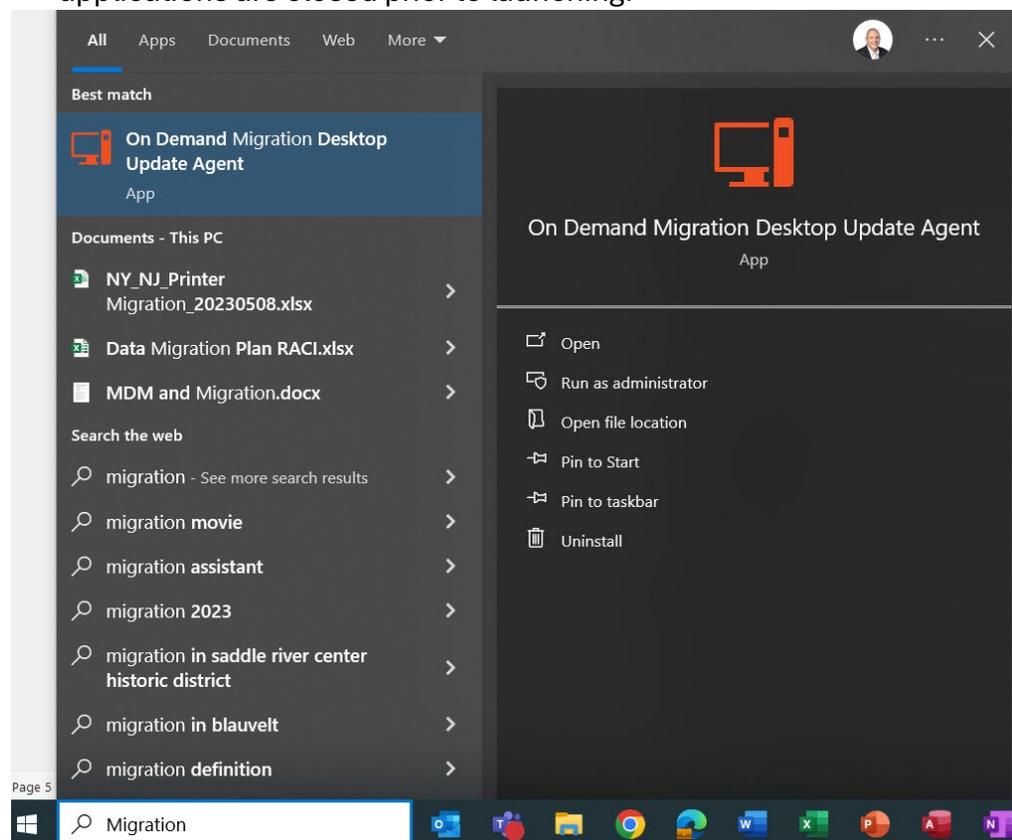
- Open the **Outlook** app on your mobile device, reauthenticate/MFA as prompted. Emails should sync automatically. If issues arise, you may need to reconfigure your account depending on your OS and email client version. **BT Support will assist with this if required.**
- For **Teams** and **OneDrive** on your mobile device, sign out and sign back in. This should configure your migrated account on your mobile device. If issues arise, you may need to reconfigure your account depending on your OS and email client version. **BT Support will assist with this if required.**
- Contact BT Support if you need assistance or if your emails have not sync'd to your mobile device.

# Laptop Sync

Accessing email, Teams and OneDrive via your laptop is completed using the On Demand Migration Desktop Agent. This application will complete the sync/caching of your email, calendar, and OneDrive. Sync/Caching time will vary based on your mailbox and OneDrive size. Keep in mind that you can access all of your emails and files via the browser or mobile device while this is in process.

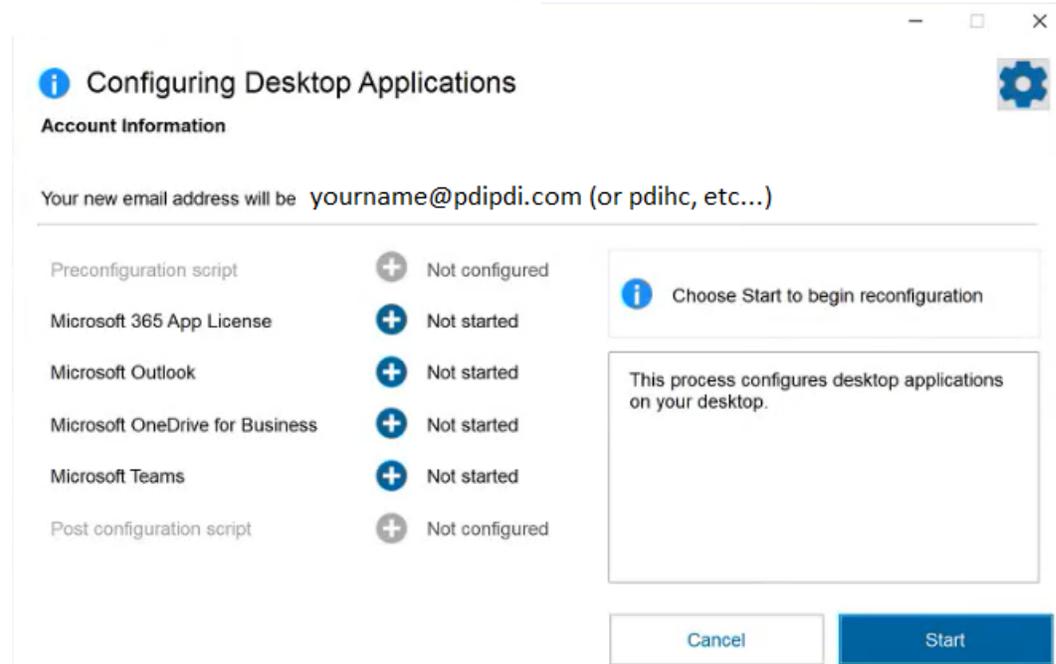
The steps completed here are:

1. Activate Office Licensing
  2. email Sync
  3. OneDrive Sync
  4. Teams Sync
- Launch/Run the Quest Migration tool
    - In the “Search” on the Windows toolbar, enter “Migration” to access the “On Demand Migration Desktop Update Agent”. Make sure all Microsoft applications are closed prior to launching.



- Open the application, confirm that your account name in the account information field is selected and follow the steps to sync/cache each of

the M365 areas to your laptop by pressing “Start”/“Next” after each step (you may be prompted for MFA during this process).



- Click “START” / “NEXT” as each of the steps are completed
- The migration app will ask you to close applications if they are open prior to / during the sync (i.e. Outlook, Teams)
- You may also be prompted to reconnect with your account and password as needed as each step is completed (i.e. for OneDrive, and activation of your MS license)
- If there are any errors, contact BT Support immediately
- See attached instructions for a step-by-step additional reference (DetailedWorkstationMigrationSteps.docx)



DetailedWorkstation  
MigrationSteps.docx

- Once the migration steps are complete, verify **access** to key applications
  - Outlook
  - Teams
  - OneDrive
  - Office Apps (Word, Excel, PowerPoint – online & desktop)
- Outlook – Post-Migration Tasks
  - **New Teams Meeting Links**

- As part of the migration to the new tenant, new Teams meeting links are being generated.
  - The migration tool has automatically created new meetings with updated links in your calendar.
  - For each meeting where you're listed as an attendee, you will receive a new meeting invitation email and a cancellation email for the original meeting.
  - Both versions of the meeting will appear in your calendar until you process the cancellation of the original one.
  - To ensure a smooth transition, we recommend managing these meeting updates directly from your inbox.
- Re-create your **Outlook rules**
- Re-create your **signature block**
- Review your email folder structure and confirm recent emails are present
- OneDrive – Post-Migration Tasks
  - Review your files and folder structures
  - Confirm recently updated files are synced
- Teams – Post-Migration Tasks
  - Confirm your Teams channels are visible
  - Verify associated files and content is accessible

# Power BI Access

All Power BI reports are now available through an updated interface using a single URL at:

<https://app.powerbi.com/groups/me/apps/d65524b4-e471-42a7-b636-059375e98001/reports/2c98ce83-1b49-43fd-a99f-cd0568f7ef7d/ReportSection?ctid=4f9f5dc2-b437-4f49-9fec-4f311a90bd30&experience=power-bi>

This new interface brings all the dashboards you have access to into a single, centralized page. The functionality within Power BI remains the same—only the way you access your reports has changed.

On the left side of the page, you'll find a panel listing all your dashboards and reports. You can easily navigate individual pages within each report from this panel.

**Daily Sales Summary**

Days Remaining in Month: 19 | % Month Comp: 10% | % Year Comp: 42%

Previous Day Invoiced			Previous Day New Orders		
Division Group Name	Cases	Amount	Division Group Name	Orders	Amount
HEALTHCARE	25,664	\$1,385,111	HEALTHCARE	50	\$1,460,645
SANI PROFESSIONAL	6,046	\$200,321	CONTRACT	7	\$647,705
CONTRACT	3,782	\$131,053	SANI PROFESSIONAL	20	\$452,568
<b>Total</b>	<b>35,492</b>	<b>\$1,716,486</b>	<b>Total</b>	<b>79</b>	<b>\$2,567,649</b>

Month To Date - Current Month										
Division Group Name	PY	Budget	LE	Invoiced	Ship Not Inv	Open (incl Hold)	Inv + Open	I+O vs Bud	I+O vs LE	
HEALTHCARE	\$37,544,568	\$40,719,228	\$40,881,466	\$1,976,361	\$1,465,598	\$6,514,190	\$9,963,797	24.47%	24.37%	
SANI PROFESSIONAL	\$7,633,164	\$9,145,364	\$9,157,303	\$465,307	\$267,607	\$2,629,942	\$3,362,856	36.77%	36.72%	
TRU D	\$615,742	\$1,195,498	\$1,097,798	\$50,246		\$172,422	\$222,668	18.63%	20.28%	
CONTRACT	\$1,705,749	\$1,147,306	\$2,695,121	\$145,876	\$19,127	\$2,498,637	\$3,300,865	287.71%	122.48%	
NPP TSA		\$21,286	\$21,286			\$27,341	\$27,341	128.45%	128.45%	
<b>Total</b>	<b>\$47,499,224</b>	<b>\$52,228,682</b>	<b>\$53,852,973</b>	<b>\$2,637,791</b>	<b>\$1,752,332</b>	<b>\$11,842,533</b>	<b>\$16,877,527</b>	<b>32.31%</b>	<b>31.34%</b>	

Year To Date										
Division Group Name	PY	Budget	LE	Invoiced	Ship Not Inv	Open (incl Hold)	Inv + Open	I+O vs Bud	I+O vs LE	
HEALTHCARE	\$213,200,756	\$234,657,556	\$240,894,686	\$201,475,872	\$1,465,598	\$6,524,531	\$209,473,640	8	8	
ENVIRONMENT OF CARE	\$178,902,371	\$195,290,221	\$198,382,397	\$165,568,691	\$1,189,957	\$5,148,884	\$171,909,012	6	6	
INTERVENTIONAL CARE	\$22,289,875	\$27,110,280	\$29,674,453	\$25,083,704	\$219,959	\$986,620	\$26,296,415	6	6	
PATIENT CARE	\$12,008,510	\$12,257,055	\$12,837,835	\$10,823,477	\$55,682	\$389,027	\$11,268,221	9	9	
UNDEFINED	\$0	\$0	\$0	\$0	\$0	\$0	\$0			
SANI PROFESSIONAL	\$43,589,086	\$51,569,288	\$50,215,409	\$40,904,323	\$267,607	\$3,405,516	\$44,577,445	8	8	
CONTRACT	\$6,585,354	\$10,916,574	\$13,512,637	\$11,197,948	\$19,127	\$8,130,149	\$19,984,449	18	18	
TRU D	\$4,550,810	\$5,249,458	\$7,153,821	\$3,772,211		\$646,422	\$4,418,633	8	8	
NPP TSA	\$0	\$21,286	\$21,286	\$0		\$27,341	\$27,341	128	128	
<b>Total</b>	<b>\$268,074,292</b>	<b>\$302,490,888</b>	<b>\$311,895,300</b>	<b>\$257,439,526</b>	<b>\$1,752,332</b>	<b>\$18,754,570</b>	<b>\$278,591,299</b>	<b>9</b>	<b>9</b>	

As part of our move to the new Microsoft tenant, any bookmarks and subscriptions you previously saved could not be migrated automatically. You will need to set up new bookmarks and subscriptions within the reports in the new tenant.

If you are unable to access this page or any of your reports, please contact BT Support.