Key Considerations during UEM Migration
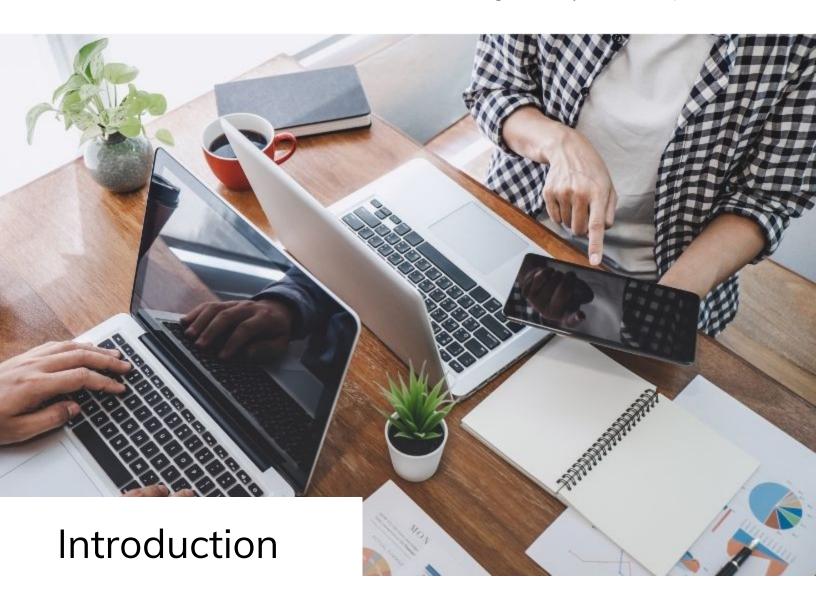
WHITE PAPER

hexnode

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Introduction

Attaining business growth while alienating yourself from technology is a modern utopia. Since desktop and mobile devices have become a fundamental part of the enterprise culture, it hasn't been too easy to keep endpoint management solutions at bay. An endpoint management solution helps you remotely set up, manage, monitor and troubleshoot your endpoints from a single web-based instance.

But what if the UEM (Unified Endpoint Management) solution you have cautiously selected isn't good enough or is incapable of meeting your demands, or you simply require a more robust tool? Well, then switching the UEM vendor is definitely a good option. But isn't switching the vendor a tiresome process? No, it doesn't have to be as tedious or agonizing as you picture it in your head. Read further to know the key points you must remember in order to make the migration process a trouble-free task. About Hexnode UEM

Hexnode is an award-winning Unified Endpoint Management solution that delivers top-notch endpoint, kiosk, content, app, asset and security management capabilities. Though UEM was not a widely acknowledged platform until a few years back, organizations worldwide are now seeking assistance from UEM solutions for delivering seamless device management. Hexnode is a powerful UEM solution that can handle all the enterprise management needs of small to large enterprises. With Hexnode, the IT admin can manage all the endpoints from a single management web portal, irrespective of the make or model. Unlike the market alternatives, the Hexnode cloud-based solution provides secure, scalable and robust management services. In addition, it supports the administration of iOS, Windows, Mac, Apple TV, Fire OS and Android endpoints — both personal and corporate, deployed for work-critical applications.

Key Considerations

This article helps you simplify the migration process and ensure business continuity by providing the necessary tips and instructions to ease the transition. To minimize any possible disruptions, the migration process should only be initiated after careful examination and preparation.

Here are a few things to keep in mind once you have decided to migrate from your current UEM vendor to Hexnode:

- Identify the key migration checkpoints.

- Create a checklist by considering all the necessary migration procedures.

- Formulate a step-by-step migration workflow to ensure an uninterrupted transition.

- Create a timeline based on the migration checkpoints.

While you plan the switch, identify the key factors that have a critical impact and construct a logical timeline. Remember that the timeline should be made only after close consultation with your team members by understanding the crucial milestones like holidays, financial aspects, in-house task deadlines, etc.

The only way to ace the migration timeline is through fully understanding your organizational needs; it includes both the current and potential future requirements. Research and analyze the current vendor to identify their shortcomings, critical workflows and settings, and potential areas of improvement. This would help you create scalable configurations while setting up Hexnode UEM.

While you draw a migration timeline, it is ideal to allot substantial time to complete the migration procedure. Note that the migration procedure can be completed at any pace that you require – fast or slow. Nonetheless, it is better to allocate time to test and troubleshoot the process you have completed before moving on to the next step. Pilot group testing all features before implementation is also a viable method that would help you identify the issues and take timely corrective actions without affecting the day-to-day operations. Also, it is best to migrate resources in batches so that even if the data gets lost or gets destroyed during the switch, the business impact would be minimal.

Before creating the timeline, make sure you closely inspect the contract with the previous device management vendor to avoid any possible consequences in the near future.

Sample Migration Timeline

1. Create a migration checklist

In addition to the migration procedure, create a checklist including all the necessary pre- and post-migration actions. These processes must be finished as per the set timeline.

The checkboxes in the checklist include, but are not limited to:

- Acquiring assets from the previous UEM solution
- Document the connections the UEM has with other external services
- Create the migration schedule and fix the rollout date

Use the above checklist sample to create a custom checklist that addresses all your endpoint management needs during migration.

2. Locate the organizational assets in the previous UEM solution

Navigate through the previous device management platform and gather the assets that could help simplify the device management using Hexnode. This includes devices list, users list, certificates, configured policies and other settings. Before migration, make sure to take a backup of all the organizational data present in the devices to the cloud.

You might not need all the data from the previous device management solution. So, this is the right time to decide which data needs to be kept and which to be trashed. Formulate a strategy to migrate the data that are deemed necessary.

3. Identify the external connections of the current UEM

Failing to set up necessary integrations on time during the migration might disturb the smooth functioning of the organization. Therefore, it is essential to make time to identify and document the organization's external connections. This includes integrations like Google Workspace, Okta, ABM/ASM, etc. Also, for effective migration, you should move the tokens, certificates and other data that are required to set up the integration with Hexnode from the previous UEM vendor. For instance, for migrating ABM enrolled devices, you should create a device management server for Hexnode in ABM and move the devices to that server before executing device wipe.

4. Define your endpoint management requirements

Seamless migration is impossible without fully understanding the requirements of a UEM solution. You should be aware of the current corporate demands, future expansions, and the capabilities of the Hexnode UEM solution. Appropriately identifying these will enable you to make well-informed decisions as well as set up an airtight workflow. Note that you can always request additional features required for managing your devices if Hexnode does not currently support it.

5. Select the potential enrollment workflow

Identify the best workflow to complete asset migration to the Hexnode console. Also, formulate a foolproof plan for an effective endpoint management.

Select an enrollment method to add your device to your Hexnode server. The device should be first removed from the previous UEM server to get it enrolled in Hexnode.

Hexnode offers a number of bulk enrollment options for all device platforms, which requires minimal to zero human interaction. This includes, but is not limited to Google Zero-touch enrollment, Samsung Knox Mobile enrollment, Apple Device Enrollment Program, Apple Configurator enrollment, etc. Lesser the human interaction, more convenient it is for the IT administrators to remotely roll out the devices.

If you want to bind a device to the organizational policies as soon as it gets enrolled in the console, use the pre-approved enrollment option. This enrollment option enables you to add device details like IMEI and serial number to the UEM console prior to device enrollment. You can proactively attach pre-configured organizational policies to the pre-approved devices. So, as soon as the device completes the enrollment procedure, Hexnode sends out the organizational configurations to the devices, leaving time for no errors.
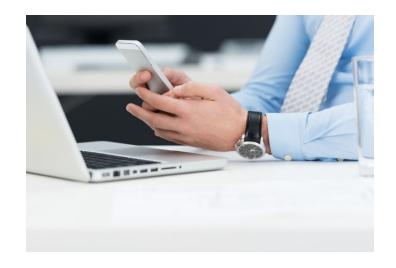
6. Notify the end-users about the transition

Inform your end-users about the UEM switching process to ensure a smooth transition and operational continuity throughout the transition state. This lets them prepare for the changes beforehand, and ensure that the critical work data is secured. It is recommended that you create a help guide for the end-users with step-by-step instructions for all the processes that you want them to perform. For instance, "How to back up the device?"
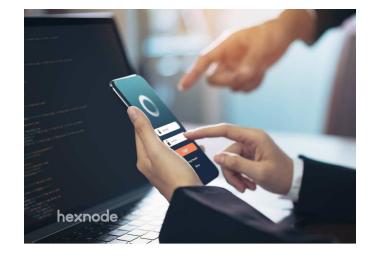
7. Set up the Hexnode UEM portal

Before actually migrating the devices, set up and configure the Hexnode UEM console. This includes adding resources into Hexnode, like the essential apps, contents, scripts, certificates like APNs, etc. This would be the apt time to set up the integrations like Okta, Google Workspace, ABM/ASM, etc.

Also, you can pre-configure the policies in Hexnode as per your requirement. Policy pre-configuration allows you to set up policies without defining the target entities.

8. Remove devices from the previous UEM server

Therefore, to move devices to Hexnode, you should first remove them from the current UEM. Note that some specific devices and enrollment techniques employed demand devices to be wiped to remove management. So, make sure to disable the activation lock or factory reset protection on the devices prior to wipe. Additionally, backup any important data stored on the device.

9. Track device enrollment

Enrollment is one of the crucial steps of device management. It is recommended to migrate your devices in small batches instead of migrating them altogether. This helps to ensure that even if you are migrating the devices during work hours, the functioning of the whole organization will not get disturbed. This is also helpful in determining and correcting any shortcomings in your device enrollment strategy.

Nevertheless, keep in mind that not all devices can be rolled out as quickly as you would like. There will always be a minor share of devices, which might get delayed to be enrolled as they would have gone missing, unresponsive or offline. Proper tracking of such devices is essential for a successful migration.

With Hexnode, you can easily track the enrollment status of the devices. You can identify the enrolled and pre-enrolled devices, the devices to which enrollment requests are sent and the devices that are yet to be enrolled.

10. Apply the concerned policies to the devices

After successfully enrolling the devices, the next step is to apply the organizational configurations to those devices. Note that if you have pre-enrolled your devices to Hexnode, policies can be proactively attached to them before device enrollment.

Policies and other remote managerial actions in Hexnode can target individual users, devices, groups and domains. For easy policy association, it is best to group the users or devices with similar tasks and attach the managerial policies with that particular user/device group.

11. Post-migration checks

After migration, compare the assets you have exported from your previous device management vendor to the Hexnode inventory. Confirm that everything is in check and transferred correctly. Remotely monitor the device status using Hexnode, and instruct the users to approve any pending access request for the Hexnode app on their device.

Hexnode Support Team will be on standby to provide you with our professional expertise at every step throughout the journey. Feel free to contact us at your convenience. We are determined to solve all your UEM related hiccups and make the UEM transitioning a walk in the park.

Once the devices are enrolled in Hexnode, you can exploit the UEM platform to its full potential to meet any of your use-cases. With Hexnode, you can add additional technicians with specific roles to assist the admin in managing the devices. Hexnode helps you streamline your device management experience through its advanced features like telecom expense management, identity management, device, user, app, kiosk and content management, etc. With Hexnode's dynamic dashboard, admins can keep an eye on all the assets and other device-related activities, ensuring device and data security at all times.

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