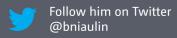Sharegate

MIGRATION CHECKLIST

About Benjamin Niaulin

Benjamin Niaulin is an Office Servers and Services MVP, recognized as one of the Top 25 SharePoint influencers in 2014 and 2nd for Office 365 in 2015. Being a Microsoft Certified Trainer since 2008 has allowed him to become proficient in simplifying complex technologies, making him an expert in SharePoint & Office 365 vulgarization. He spoke at over 200 conferences around the world.

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Get Ready to Migrate

Depending on what you're planning to do, migrating to SharePoint can be a difficult task. More often than not, though, the actual migration is the easiest part. What causes headaches is trying to make sure you've thought of everything prior to migrating.

That's why we've developed a convenient checklist to guide you through the process. Whether you're migrating from a previous version of SharePoint, going to Office 365, or even simply moving files in from your File Shares, this migration checklist will be very helpful.

Make a Detailed Inventory of Your Environment

By having a detailed inventory of everything you have, you'll be able to make better decisions and estimates on the effort of the migration. The more information you have, the easier it will be to plan and respect your migration deadlines.

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- ☐ Establish an Inventory:
  - ☐ Site Collections
- ☐ Sites
- ☐ List and Libraries
- ☐ Pages
- ☐ Custom Solutions
- ☐ Workflows
- ☐ Content Types
- ☐ Site Columns
- ☐ Permissions
- ☐ User Alerts
- ☐ Retention Policies
- ☐ Records
- ☐ Users and Groups used
- ☐ Large lists or libraries
- ☐ All files that have a dependency to another file using a URL
- ☐ Blocked File Types
- ☐ Branding
- ☐ Any other UI customizations (JavaScript, altered menus, etc.)

Clean Up Your Old Environment

SharePoint is all about helping people build what they need to get the work done, but it doesn't mean you still need everything today. Take the time to find, remove and reorganize things in your environment.

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- ☐ Find and remove "Orphaned Users"
- ☐ Remove empty SharePoint Groups
- ☐ Put users with explicit permissions back into Groups
- ☐ Delete any Unused Content Types, Site Columns and Workflows
- ☐ Find sites that haven't been modified in over a year, and see if you still need them
- ☐ Ask users to check-in any document currently checked-out (ensure you migrate the latest version)
- ☐ Find large Site Collections
  - ☐ Break them up into multiple Site Collections
- ☐ Find large Sites
  - ☐ Promote them into Site Collections
- ☐ Remove duplicate content
- ☐ Clean up items containing too many custom permissions
- ☐ Remove unwanted versions from your version history
- ☐ Reorganize Lists and Libraries with too many columns
- ☐ Rethink and reorganize very large lists

Prepare Your Destination Environment

A migration is the best time to wipe the slate clean and start over. Make sure you take the time to plan and structure your new home according to your needs. You might not get the chance again for a long time.

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- ☐ Map your destination's architecture
- ☐ Optimize your new SharePoint Servers' performance [At the install]
- ☐ Configure all Web Applications
  - ☐ Check desired authentication & authorization rules
- ☐ Back everything up
- ☐ Test the restore
- ☐ Check the databases for corrupt data
  - ☐ If any corrupt data: delete it.
- ☐ Run a Test Migration
  - ☐ Highlight any unsupported elements
- ☐ Configure your new Search Topology.
- ☐ Set SharePoint up to import user profiles from any specific sources.
- ☐ Map a plan for the metadata on your content.
- ☐ Look at your customizations
  - ☐ If required, convert them to work in the new model/destination (see appendix)

Communicate With Your Users

Your biggest challenge for the migration is bringing change to your users. For this to be successful, you'll need to make sure they know what's going on and why it's happening.

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☐ Inform your users before starting

    ☐ Downtime planned by the migration

    ☐ The reason for the change and the value for them

    ☐ Possible changes in the environments

        ☐ URL changes

        ☐ Bookmarks

        ☐ Document References (Excel macros, etc)

    ☐ Estimated timeline for the migration

☐ Create sandbox sites for hands-on previews

Start Your Migration

The actual migration effort shouldn't be too complicated if you followed the previous steps. It comes down to moving, and dealing with, anything that pops up that didn't show up during testing.

- ☐ Workflows
  - ☐ Complete or Stop running Workflows about to be migrated
- ☐ Migration scenarios
  - ☐ If migrating from SharePoint 2013 On-Premises
    - ☐ Perform database attach-upgrade to bring everything "as-is"
    - ☐ Use a third-party tool such as Sharegate to granularly migrate and restructure as you move
  - ☐ If migrating from an earlier SharePoint version
    - ☐ Use a third-party tool such as Sharegate

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Post Migration

Before you swing open the doors and let everyone into your SharePoint, make sure everything is ready for them.

☐ Test your Destination Environment

    ☐ Ensure all migrated successfully

    ☐ Test/Run all workflows

    ☐ Check user permissions

☐ Create a backup of your new environment

☐ Remove access to the old SharePoint

☐ Run a full crawl

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For Your Custom Development

FROM **ERWIN VAN HUNEN** MICROSOFT MVP
AND MICROSOFT CERFITIED MASTER WORKING
AT RENCORE

As a product owner for transformation tooling,
Erwin helps customers migrate from on-premises
solutions to the new add-in model for SharePoint.

Additionally, Erwin is also a core member of the
Office 365 Patterns and Practice team, and a regular
speaker at SharePoint conferences around the
world. He is one of the organizers of SharePoint
Saturday Stockholm, the largest SharePoint focused
conference in Scandinavia.

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Considerations for your Custom Solutions

Create an inventory of your customizations. Take a look at what needs to be migrated. A migration is often the perfect time to identify what you don't need anymore, and leave it there. Also, make sure you have a good overview of what you have in your sites (WSP, Sandbox, etc), and if one depends on another. Map it out to be sure to deploy everything in the right order at the destination.

Are you running any Farm Solutions? The good news is that they still work in SharePoint 2016. However, Microsoft recommends you stop using them. Also, they can't be deployed to Office 365. If you do migrate them, open the WSP and change the target deployment.

Do you have any Sandbox Solutions? They still work in SharePoint 2016, but as with Farm Solutions, they recommend you to stay away from them. Instead, look at the artifacts within, and convert them to provisioning in the add-in mode. If you are going to Office 365, though Sandbox Solutions will continue to work, those with Code will not.

For Your Custom Development

FROM ERWIN VAN HUNEN MICROSOFT MVP AND MICROSOFT CERFITIED MASTER WORKING AT RENCORE

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Considerations for your Custom Solutions (cont'd)

Pain Points when migration to Office 365:

· Converting any Web Parts you developed to Add-Ins may prove to be difficult.

· If you've built Timer Jobs, there is no real solution when going Online. You'll have to find new solutions that give you the same result.

· Event Receivers: you'll also need to find a way to host them somewhere, and rewrite them to continue getting the same result you used to.

· You may need to reconsider how you deploy your declarative artifacts. You may need to do this using an Azure Web App, PowerShell, etc.

· Custom Fields is something you should stay away from. Instead, see if Display Templates can help you display content the way you wanted it, instead of creating a new field for it.

· Depending on your migration method, item IDs in lists and libraries will change during the move. If you are using them in your logic you will need to take that into account.