GTConsult

SharePoint Migration Best Practices

CONTENTS

1.   WHY SHOULD YOU PLAN BEFORE MIGRATING?

Creating a detailed migration plan will help you avoid potential errors, reduce downtime, and ensure that your SharePoint migration project runs smoothly.

2.   PREPARING FOR THE MIGRATION

2.1.   TAKE INVENTORY OF YOUR SHAREPOINT DATA

The most important pre-migration step is taking stock of what's in your current environment with a solid audit.

1. Is it file share?
2. On-premises?
3. Box?

A previous version of SharePoint or SharePoint Online?

You need to know what's under the hood... This way, you can make better decisions with proper planning about what to migrate and determine how long it will take to upgrade your end users into their modern workspace.

Take inventory of:

1. Site collections
2. Sites
3. List and libraries
4. Pages
5. Shared files
6. Tasks
7. File size
8. Documents
9. Custom solutions
10. Workflows
11. Content types
12. Site columns
13. Templates
14. Owners and permissions
15. (Modern SharePoint) team site permissions through associated Microsoft 365 Groups

16. User alerts
17. Information protection policies
18. Retention policies
19. Records
20. Users and groups used.
21. Large lists or libraries
22. All files that have a dependency to another file using a URL
23. Branding
24. Any other UI customizations (JavaScript, altered menus, etc.)
25. URL lengths

2.2. CLEAN UP YOUR ENVIRONMENT

Time to roll up your sleeves and do some cleaning. With your users working in SharePoint every day, things can get messy fast.

Once you have a solid inventory, start hammering away to weed out data that's:

1. redundant,
2. unused, or
3. no longer up to date.

The goal is to migrate only what you need to create a more efficient environment that's easy to manage.

Do this by:

1. Orphaned users
2. Empty SharePoint groups
3. Empty lists and libraries
4. Unused custom content types, site columns, and workflows
5. Sites that haven't been accessed or modified within a custom timeframe
6. Duplicate content
7. Items containing too many custom permissions
8. Microsoft 365 Group permissions
9. Unwanted versions from your version history
10. Recycle bin

2.2.1. TIPS FOR CLEANING UP

1. Ask users to check in any document currently checked out, including those that have never been checked in (ensure you migrate the most recent version)
2. Reorganize lists and libraries with too many columns
3. Rethink and reorganize very large lists
4. Promote sites to a site collection

2.3. GET YOUR NEW ENVIRONMENT READY

A SharePoint migration is a timely opportunity for a fresh start. Before you move, you'll need to prep your new home.

Spend some time planning and structuring your environment according to your needs.

1. Create your new environment's architecture
2. Create and configure SharePoint hub sites settings accordingly
3. Optimize your new SharePoint Servers' performance (at the installation)
4. Configure all Web Applications – check desired authentication and authorization rules
5. Back up everything
6. Test the restore
7. Check the database for corrupt data and delete any
8. Run a test migration
9. Highlight any unsupported elements
10. Resolve issues that occurred
11. Determine migration speed
12. Create a migration schedule that works for
13. Configure your new Search Topology
14. Set SharePoint up to import user profiles from any specific sources
15. Map a plan for the metadata on your content
16. Update your metadata, bulk additions or edits to metadata
17. Optimize mapping of templates, columns, or users ❏ Look at your customizations – if required, convert them to work in the new model /destination
18. Establish a governance plan

3.   PREPARE YOUR USERS

Throughout the migration, end-user training and communication are key factors to drive adoption.

To achieve the best possible outcome, you'll want to make sure users understand the benefits behind the move.

Determine what you'll offer in terms of training and support to set your team up for long-term success.

1. Communicate your migration plan
2. Downtime planned
3. The reason for the change and the value for them
4. Possible changes in the environments
5. URL changes
6. SharePoint Sync
7. Bookmarks
8. Document references (Excel macros, etc.)
9. Estimated timeline
10. No working in the source location during migration
11. Train users how to use SharePoint effectively
12. Work with key users during migration

4.   MIGRATE

It's essential to note the issues that arise during the migration and resolve them as needed.

It's easier when you have the right tools that help to make sure your move is a successful one.

1. Workflows
2. Complete or stop running workflows about to be migrated
3. Use a third-party tool like PowerShell to automate the process
4. Have a migration account with access to source and destination environments

5. POST-MIGRATION

Rather safe than sorry! Tick off the following to ensure everything is perfect when starting work on your new home:

1. Ensure everything migrated successfully
2. Test/run all workflows
3. Check user permissions
4. Create a backup of your new environment
5. Switch the source to read-only mode
6. Remove access to the old SharePoint
7. Run a full crawl
8. Run a script to remove sharing links
9. Get the migration approved by key users
10. Check in with end users to see how they are adjusting to their new environment