



The
ultimate
Office 365
migration
checklist

ShareGate:

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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's spoken at over 200 conferences around the world.

 Follow him on Twitter [@bniaulin](https://twitter.com/bniaulin)

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Planning a migration

So you're ready to take the plunge and migrate to Office 365. You're sold on the benefits of cloud-based business, mobile access, anytime, anywhere productivity, and the ability to use all of Microsoft's latest tools as soon as they become available. I mean, why wouldn't you be?

More often than not, though, the migration is actually the easy 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 help guide you through the process. Whether you're moving from a previous on-premises version of SharePoint or simply from file shares, this migration checklist will no doubt be very helpful.

Make a detailed inventory of your environment

Having a detailed inventory of your source environment will help you make better decisions and a more accurate assessment of the effort involved. The more information you have, the easier it'll be to plan your migration and meet your deadlines.

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.)

Notes:

Clean up your old environment

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

- Find and remove “orphaned users”
- Remove empty SharePoint groups
- Put users with explicit permissions back into groups
- Delete any unused custom content types, site columns and workflows
- List sites that haven't been accessed or modified in a while and determine whether they're still needed
- Ask users to check in any currently checked-out documents, including those that have never been checked in (make sure you migrate the most recent 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
- Ask users to complete any pending workflow tasks

Notes:

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.

- Map your destination's architecture
- Back up all data
- Test the restore
- Check the databases for corrupt data
 - If any corrupt data: delete it
- Run several migration tests
 - Highlight any unsupported elements
- Use achieved speed to extrapolate the overall time required for all sites
- 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)
- Find deprecated native templates or features and plan for their replacement

Notes:

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.

- Before you start, inform your users of
 - Expected downtime
 - 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
- Find out where to go to get an updated status or help during the transition
- Create sandbox sites for hands-on previews
- Circulate the proposed calendar ahead of time to ensure it will not interfere with business-critical efforts

Notes:

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
 - Use a third-party tool such as ShareGate Desktop to granularly migrate and restructure as you move
- For very large sites, perform a multi-stage (incremental) migration

Notes:

Post-migration

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

- Test your destination environment
 - Ensure everything migrated successfully
 - Test/run all workflows
 - Check user permissions
- Create a backup of your new environment
- Revoke access to the old SharePoint

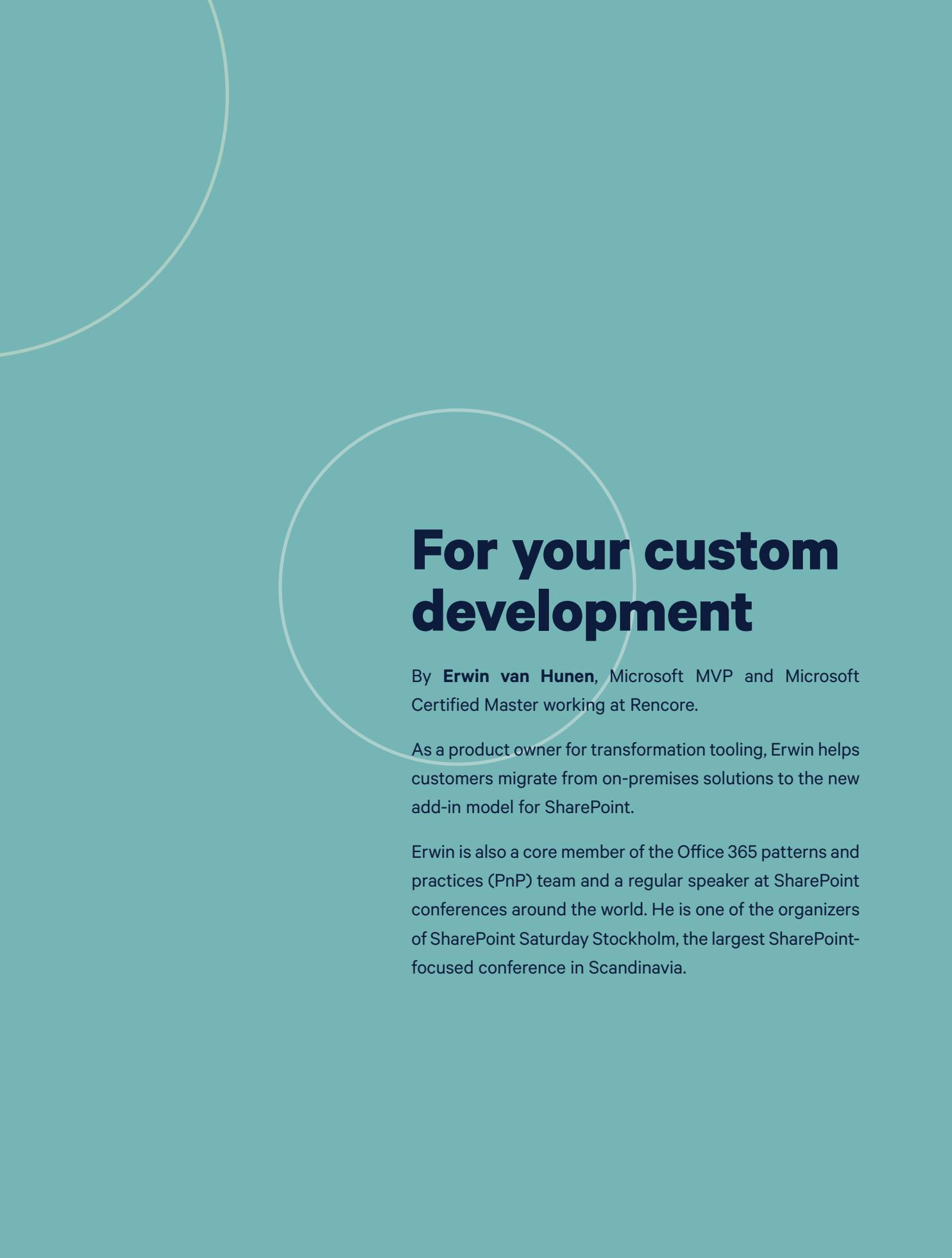
Notes:

Monitor your new environment weekly

Now that your Office 365 platform is up and running, it's incredibly important to constantly monitor usage, security and other important elements to gain visibility and ensure a clean and bulletproof environment.

- Monitor usage
 - Make sure users are getting all they can out of Office 365
- Monitor security
 - Check for data breaches
 - Control external sharing
- Monitor permissions
 - Identify broken or custom permissions
 - Ensure users have the proper permissions

Notes:

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For your custom development

By **Erwin van Hunen**, Microsoft MVP and Microsoft Certified 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.

Erwin is also a core member of the Office 365 patterns and practices (PnP) 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.

Considerations for your custom solutions

- Create an inventory of your customizations.
- Determine what needs to be migrated. A migration is the perfect time to identify what you don't need anymore and should therefore leave behind.
- Make sure you have a good overview of your sites' contents (WSP, sandbox, etc.) and any potential dependencies. Map it out to ensure that everything is deployed in the right order at the destination.
- Are you running any farm solutions? These can't be deployed to Office 365. Besides, Microsoft recommends you stop using them.
- Do you have any sandbox solutions? Although they will continue to work in Office 365, those with code will not. As with farm solutions, it is recommended you stay away from these.

Notes:

Considerations for your custom solutions (cont'd)

Known issues when migrating to Office 365:

- Converting custom-developed web parts to add-ins may prove to be difficult.
- Classic timer jobs aren't supported in SharePoint Online. You'll need to find new solutions to achieve the same results.
- Event receivers will need to be hosted remotely as well as rewritten in order to maintain consistent results.
- You may need to reconsider how you deploy your declarative artifacts. You may need to do this using an Azure Web App, PowerShell, etc.
- Stay away from custom fields. Instead, consider using display templates or Office 365 column formatting to display your content how you want 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.

Notes:



ShareGate:

Every business will eventually move to the cloud and adapt to it. That's a fact. ShareGate helps with that. Our products help IT professionals worldwide migrate their business to the cloud, increase cloud adoption while reducing sprawl, and control cloud costs.

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