



# SHAREPOINT MIGRATION

## PREPAREDNESS CHECKLIST

Migrating SharePoint requires strategy, planning, communication, technical knowledge, troubleshooting skills, great execution and sometimes a bit of luck. They say in life, moving is one of the most stressful experiences anyone can go through. SharePoint Migrations definitely fall into that category if not managed and handled well. The SharePoint A Team have been hard at work creating the most comprehensive SharePoint Migration Checklist for anyone's migration project.

## Automated Tools Tuide for the SharePoint Migration Checklist

	Sharegate	Metalogix Control Point/ Content Matrix	PowerShell
Establish an Inventory	Yes	Yes	Possible
Remove Orphan Users	Yes	Yes	<a href="#">Yes</a>
Identify Influential Users	Yes	Yes	No
Clean-up Unused SharePoint Groups	Yes	Yes	No
Find Inactive Users	Yes	Yes	No
Scrubbing your SharePoint Content	Yes	Yes	No
Breakup Large Site Collections	Yes	Yes	No
Manage Content Database Sizes	Yes	Yes	<a href="#">Yes</a>
Find Large Sites (And Promote to Site Collections)	Yes	Yes	No
Find Small Site Collections (Demote to Subsites)	Yes	Yes	No
Identify and Manage Large Lists	Yes	Yes	<a href="#">Yes</a>
Clean up Content	Yes	Yes	No
Remove Duplicate Files	Yes	Yes	Possible
Archive the Audit log	Yes	Yes	No
Are Content Types Being Used	Yes	Yes	No
Custom Solutions and Web Parts	Yes	Yes	<a href="#">Yes</a>

## SharePoint Migration Checklist Target Market

### Identify Influential Users

### Remove Orphan Users

An often overlooked area of the cleanup process is removing orphan users. Orphans are users who no longer have a linking AD account. Orphan users may also have active SharePoint alerts or My Sites. While orphan users can no longer access the content, any legacy alerts and notifications can impact SharePoint's hardware resources. Cleaning out orphans before the migration will help teams gain back resources and better predict SharePoint user growth.

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## Clean-Up Unused SharePoint Groups

On creation of new site collections the default SharePoint Groups (owners, contributors, etc.) are also made. These groups are rarely used. Migrating these unused groups can be costly and delay the migration. Removing unused groups will save time and strengthen security .

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## Find Inactive Users

Users who have failed to adopt SharePoint before can give useful insight as to why. This is an opportunity to address those concerns and rectify them in the new platform.

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## Checked Out Documents

Checked Out Documents don't migrate so well, its important to reach out to users and get them to check in their documents. Else takeover those checked out documents, check them in and migrate them intact.

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## Clean up Custom Permissions

Custom permissions can cause frustration and confusion at first but later serious security risk. Its important to find all custom permissions and move them to group permissions wherever possible..

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## Scrubbing your SharePoint Content

A big part of the [SharePoint Migration Checklist](#) is to make sure to only migrate content that is deemed important, anything that is no longer needed needs to be left behind or archived.

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## Breakup Large Site Collections

Site Collections (or sites) often outgrow their original size. This may point to a potential resource issue. Very large site collections can impact performance which in turn will likely hinder your migration plans.

There is an opportunity to review the content and split the site collection on usage and site structure if a database has grown too large.

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## Manage Content Database Sizes

Any content database over 100GB in [SharePoint 2010](#) and [SharePoint 2013](#) is going to cause issues for backing up and restoring as its not supported. These limits have been removed for SharePoint 2016 however its still not a good idea to keep all your eggs in one basket.

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## Find Large Sites (And Promote to Site Collections)

As part of a migration plan, you might decide to reorganize your sites and promote some of them to site collections based on their size. All sites above 100 GB might be candidates for promotion to Site Collection.

Microsoft has [documented best practices](#) for the size of Site Collections that should be followed.

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## Find Small Site Collections (Demote to Sub sites)

Identify small site collections and demote them to sub sites. Often user requests for sites are satisfied by creating site collections. Over time, it might become apparent that those site collections could or should have been created as sub sites of a different site collection.

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## Remove Duplicate Files

It's not uncommon for SharePoint to be the repository for the same document in multiple places. Migrating multiple versions of the same content will cost time and money, best locate those duplicates and remove them where possible.

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## Archive the Audit log

Audit logs can be potentially huge excel files and may be better off in blob storage or in alternative locations.

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## Are The Content Types Being Used

Content types are a powerful tool in SharePoint that enable organizations to organize, manage, and handle content in a consistent way across site collections. Gaining insight into the custom content types and where they are being used will help determine how the data will be managed once you migrate. Investigating the use of Content types will also help to highlight opportunities for creating enterprise content types that will provide broader scope. Remember you will also need to setup the Content Hub on your source location before migrating any content.

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## Custom Solutions and Web Parts

Web parts are used everywhere - your SharePoint environment probably includes Microsoft web parts, custom web parts, and third party web parts.

Create an inventory of your customizations. Take a look at what needs to be migrated. A migration is 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?** Most likely they will still work on the destination farm and if they are 3rd party most likely have an update. Microsoft have leaned towards developing on the SharePoint Framework from here on out, so we would suggest looking at updating any WSP's and webparts with that mind.

**Do you have any Sandbox Solutions?** Its time to upgrade them leveraging the SharePoint Framework.

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## 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.

- Build source SharePoint Farm
- Map your destination's architecture
- Optimize your new SharePoint Servers' performance [At the install]
- Configure all Web Applications
- Check desired authentication & authorization rules
- Backup the new SharePoint environment (Fall back if all goes wrong)
- Configure your new Search Topology.
- Deploy all 3rd party and custom solutions
- Update Content Hub
- Import Termset and Metadata
- Set SharePoint up to import user profiles from any specific sources. (Only for SP2010 and 2013)
- Look at your customizations
- If required, convert them to work in the new model/destination (see appendix)
- Backup the migrating environment
- Restore the migrating environment to the new environment
- Check the databases for corrupt data
- If any corrupt data: delete it.
- Run a Test Migration
- Highlight any unsupported elements

## Communicate and involve your Users

A big part of the [SharePoint Migration Checklist](#) is to ensure the migration schedule is made available to all users. The expected downtime or freeze period needs to be communicated clearly to each site owner well in advance of the migration process.

This will ensure you can manage your users expectations and be flexible to requests. It is strongly advised to notify all key stakeholders and users after each migration phase of the project.

## User Acceptance Testing

Migrations that are not tested thoroughly often result in data being lost. A formal UAT document that has been signed off by selected users will give peace of mind before the final cut-over. UAT users should be identified during the analysis phase and made responsible for testing their sites and identifying issues that can be rectified prior to the final incremental migration cut-over.

- Inform users before the migration
- Downtime planned during the migration
- The reason for the change and the value for them (New Features and Scenarios)
- Possible changes in the environments
- URL changes
- Bookmarks
- Document References (Excel macros, etc)
- New look and feel
- Estimated timeline for the migration
- Create sandbox sites for hands-on previews for users to test out new features and experience the new look and feel

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## Start the Migration

Run the migration and deal with issues as they arise, making notes is essential. Its even easier if you have the right tools.

- Workflows
- Complete or Stop running Workflows about to be migrated
- Migration scenarios
- If migrating from SharePoint 2013 On-Premises
- Switch source farm to read only during this communicated freeze period to avoid having to run too many incremental
- Perform database attach-upgrade to bring everything "as-is"
- Use a third-party tool such as [Sharegate](#) or [Content Matrix](#) to granularly migrate and restructure as you move
- If migrating from an earlier SharePoint version
- Use a third-party tool such as [Sharegate](#) or [Content Matrix](#)
- Or you could be the one person who does a double hop migration from 2010 to 2013 to 2016 with content database attach method. Please don't be that person.

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## Post Migration

Run the migration and deal with issues as they arise, making notes is essential. Its even easier if you have the right tools.

- An important step to check the newly migrated content for any required fixes, before notifying the user base.
- Test your Destination Environment
- Ensure all migrated successfully
- Test/Run all workflows
- Check user permissions
- Setup DNS changes to point to new location and update GPO to load new Intranet
- Create a backup of your new environment
- Keep old SharePoint in Read Only for a month while users get to grips with the new environment. Remove DNS to the old SharePoint.
- Create Post Migration Issue list for users to update and track fixes.

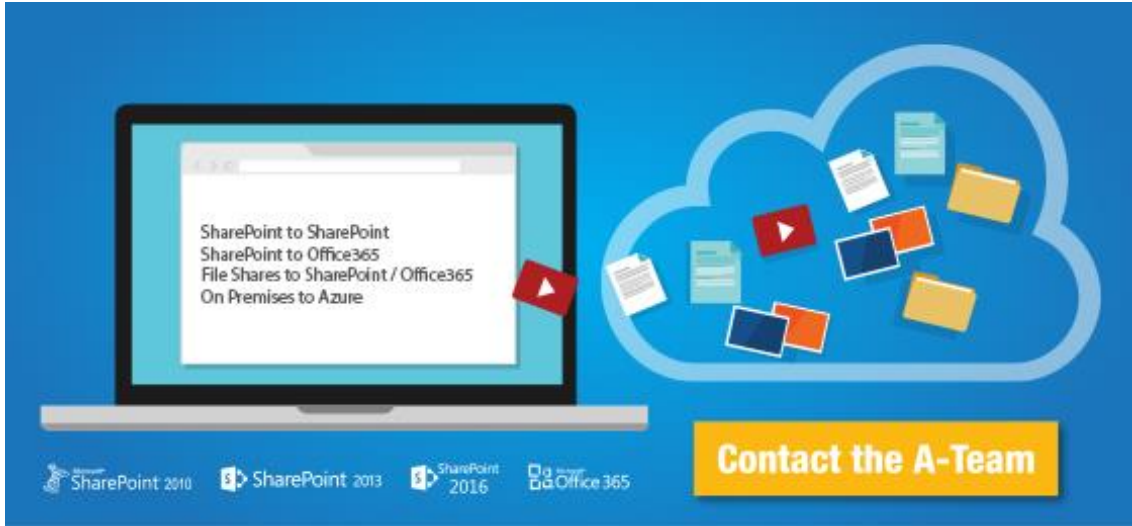
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Hoping everything went well in the SharePoint Migration Checklist above a successful launch should be the final step.

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## Useful Links

1. [The Ultimate SharePoint Migration Checklist – Sharegate](#)
2. [SharePoint Pre-Migration Checklist – Metalogix](#)
3. [Planning a successful SharePoint Migration – GTconsult](#)



A blue banner featuring a laptop on the left with a white screen displaying the following text: "SharePoint to SharePoint", "SharePoint to Office365", "File Shares to SharePoint / Office365", and "On Premises to Azure". To the right of the laptop is a light blue cloud icon containing several colorful document and folder icons. Below the laptop, there are four small logos for "SharePoint 2010", "SharePoint 2013", "SharePoint 2016", and "Office 365". A yellow button with the text "Contact the A-Team" is positioned in the bottom right corner.

SharePoint to SharePoint  
SharePoint to Office365  
File Shares to SharePoint / Office365  
On Premises to Azure

SharePoint 2010   SharePoint 2013   SharePoint 2016   Office 365

**Contact the A-Team**



A blue banner featuring a laptop on the left with a white screen displaying the text "OUR MIGRATION WHITE PAPER". To the right of the laptop is a light blue cloud icon containing several colorful document and folder icons. Below the laptop, there are four small logos for "SharePoint 2010", "SharePoint 2013", "SharePoint 2016", and "Office 365". A yellow button with the text "DOWNLOAD" is positioned in the bottom right corner.

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