Avoid a Migration Headache: Plan for a Successful Move to Office 365
Agenda

• Introductions 10 min.

• End to End Migration Plan 40 min.

• Questions and Comments 10 min.
Introduction

Dorinda Reyes
Senior Solutions Engineer/SharePoint Migration Expert

Damon Thompkins
Vice President of WW Sales & Marketing
<table>
<thead>
<tr>
<th>Pre-Migration Analysis</th>
<th>Run Pre-Migration Analysis</th>
<th>Migration Checklists</th>
<th>Migration Checklists</th>
<th>Post Migration / Known Issues</th>
<th>Known Issues</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-Migration Analysis</td>
<td>Site Template</td>
<td>Design Package</td>
<td>Validate all content is checked in prior to migration</td>
<td>Configure web-parts</td>
<td>Master Page &amp; Page Layouts</td>
</tr>
<tr>
<td></td>
<td>Features</td>
<td>Storage Increase (if needed)</td>
<td></td>
<td>Configure Site Navigation</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Web Parts</td>
<td>Site Collection Features</td>
<td></td>
<td>Update Search URL</td>
<td></td>
</tr>
<tr>
<td></td>
<td>List &amp; Libraries</td>
<td>Site Features</td>
<td></td>
<td>Set old environment to READ Only</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Workflows</td>
<td>Term Store</td>
<td></td>
<td></td>
<td>Master page and page layouts do not migration due to compatibility</td>
</tr>
</tbody>
</table>

- Evaluate items that will fail due to non-compatibility
- Import Design Package (page layouts, master page, branding)
- Enable Site Collection/Site Features
- Import Managed Metadata/Term-store
- Check in all pages and documents
- Use Metavis to remap users and web-parts
- Manually configure content query web-parts (if applicable)
- Change permissions on source site to READ Only
The Process

- Create the Schedule
- Content Audit and Mapping
- Create Checklists
  - Pre-Migration
  - Migration
- Validation
- Known Issues
Create Migration Schedules

Planning out every phase of a migration is key to ensure you are successful. It doesn't matter the tool you use just as long as you track your milestone and deliverables.

Below is an example of the types of milestone that need to be tracked. Using Microsoft Project as shown can help you with a quick at a glance.

Additionally, you can add additional sub-tasks at each level to ensure nothing is missed.

It is also useful to have a calendar that is accessible to all of the Site users that will show the dates of the migration so that everyone has a point of reference.
Pre-Migration Checklist

This checklist is used to track information about the source site of the migration and any special configurations or needs that maybe needed for and prior to migration and the size of the migration.

☐ Pre-Migration Checklist Title: ____________________________________________

☐ Migration Checklist: _____________________________________________________

☐ Does your site include any sensitive data? (Yes/No) __________________________

☐ Does your site leverage BI Capabilities? (Yes/No) ____________________________

☐ Does a tool or other application link to your current site? (Yes/No) __

☐ Target Site being migrated: _______________________________________________
Create Migration Checklists

Migration Checklist
Use this checklist to create an entry for each site being migrated. This checklist is used to track all items that need to be done for the migration by your companies migration teams. A detailed guide has been provided on the One Drive.

- Source Location
- Target Location
- Create destination site collection in SharePoint Online
- Create site collection
- Add site collection administrators
- Configure destination site collection
- Activate site collection features
- Activate site features
- Increase site storage limit
- Use MetaVis to migrate the site to SharePoint Online
- Use MetaVis to copy resource files to destination site collection
- Master Pages
- Page Layouts
- XSL Templates (if applicable)
- HTML and XSL Templates (if applicable)
- Publish master page and page layouts
- Apply master page to site
- Update site navigation to "structural" or "managed" based on design
- Update search settings URL (if applicable)
Content Audit & Mapping for Migration

There are occasions when you will be consolidating content from multiple site collection as well as reviewing the existing content to see if it needs to be migrated to your new SPO environment.

• When you ran your Pre-Migration Analysis report it will provide you with the detail of all of your content to use.
• It will be important to have a site hierarchy and know what sites or content will be going to which locations.

In the example below you can see that quite a bit of the tagging is captured so that when you move this content you know how to map the tagging.
The Content Mapping Spreadsheet will also allow you to map your tagging and disposition of content based on your review. It is easy to modify to your organization so that the dropdown menus are relevant.

<table>
<thead>
<tr>
<th>Program/Platforms</th>
<th>Role</th>
<th>Content Type</th>
<th>Program Category</th>
<th>Program Sub-Category</th>
<th>Region</th>
<th>Project Phase</th>
<th>Action</th>
<th>Access Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Art Collection</td>
<td>REM/PEPM</td>
<td>Playbook</td>
<td>FATTI</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Communications</td>
<td>Integrator</td>
<td>Design Guideline</td>
<td>Awareness Campaign</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CISO</td>
<td>Tier 1 &amp; 2</td>
<td>Branding Guideline</td>
<td>Survey Notices</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Site Services</td>
<td>RE&amp;P Field</td>
<td>PER Workbook</td>
<td>Survey Reports</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Env Sustainability</td>
<td>BOM/HRD</td>
<td>Template</td>
<td></td>
<td></td>
<td>Americas</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Facilities Management</td>
<td>FPOC</td>
<td>Contract</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finance</td>
<td>All</td>
<td>Training Document</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Governance</td>
<td>Other - See Comments</td>
<td>Training Video</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Industry &amp; Customer Engagement</td>
<td>RE&amp;P</td>
<td>Training Desk</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Infrastructure</td>
<td>Support Document</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Labs &amp; Building Architecture</td>
<td>Reference Guide</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Procurement</td>
<td>SOP</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project Management</td>
<td>SOV</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RE Strategy</td>
<td>Performance Management</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RECOD Site</td>
<td>Survey</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TMS</td>
<td>Scorecard</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Technology</td>
<td>Report</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TM</td>
<td>User Guide</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TM &amp; IMF</td>
<td>Case Study</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transaction Management</td>
<td>Best Practice</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Workplace Advantage</td>
<td>Other - See Comments</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>See Comments</td>
<td>Tracker</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Pre-Migration Analysis – Configure the Report

Analyze Sites
The selections listed below will provide important information on the compatibility of your site in migrating to your new SPO environment.

- Analyze Site Templates
- Analyze Site Features
- Analyze Site Web Parts
- Include Sub-sites

- Total Items
- List Site Limitation (mb)

- Item Size Limitation
- File Path Length
- Blocked File Extensions
- Detail Reporting Level
Site Templates: Some of them are not included in the SPO environment or have been deprecated and no longer in use or provided in other ways.

- Team Meeting Sites
- Workspace Sites

Web Parts: In most cases this will be around any custom (SharePoint Designer) Web parts that have been created. These could include but are not limited to:

- Dataview web parts
- Script Editor web parts
- Web Controls
- Data form web parts
- Page Viewer web parts

Lists & Libraries: The default list view threshold for optimal SharePoint performance is 5000 items.

- This is particularly important when migrating into SharePoint Online, as this value is not user configurable in online tenants.
Before you migrate

Consider the Storage Space Needed (if applicable)
The default storage for a SharePoint Online site will vary by organization. Investigate your situation and request more space if needed.

Import Term Store Managed Metadata
One of the most important tasks that need to be included before you migrate is to import your Managed Metadata which is located in the Term Store. Most of the content types as well as managed navigation are driven from this list.

Check-in Content
Prior to migration ensure that all of the content on your site is checked in. This included documents and pages.

Navigation
The SPO Publishing site use managed navigation by default you will need to change it if you want to use structured navigation instead.
<table>
<thead>
<tr>
<th>ISSUE</th>
<th>SOLUTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code from the SP2010 master page(s) is inserted into the SP2010 page layout(s), making them quite a mess</td>
<td>Rebuild the Master pages - do not copy them over</td>
</tr>
<tr>
<td>Don’t deploy a Design Package w/ page layouts tied to custom content types if those custom content types are already present in your SPO site.</td>
<td>If you have already migrated content types from your old environment and are thinking of creating a design package as well. Do one or the other, not both.</td>
</tr>
<tr>
<td>We’ll need to go into each page layout, through the browser, and provide a Title and Associated Content Type</td>
<td>Ensure that Content Types are present in your design package when you deploy it to save you time in having to go into every page.</td>
</tr>
<tr>
<td>Watch out for hard coded URLs, even relative URLs not using site/sitecollection tokens</td>
<td>Use relative URL’s whenever you can. Absolute URL’s from the old site will not change when migrated and will have to be manually adjusted.</td>
</tr>
<tr>
<td>Watch out for content placeholders used in your SP2010 page layouts that aren’t in the new SPO master page</td>
<td>To determine whether you have this issue, you can create an evaluation site collection that is also a publishing site, and then set the master page to the master page that ships with SharePoint 2013.</td>
</tr>
</tbody>
</table>

Additional information about all of these issues can be found here: [http://technet.microsoft.com/en-us/library/dn178510(v=office.15).aspx](http://technet.microsoft.com/en-us/library/dn178510(v=office.15).aspx)
### Web Pages

<table>
<thead>
<tr>
<th>ISSUE</th>
<th>SOLUTION</th>
</tr>
</thead>
</table>
| • Web pages that have been detached from their layouts will have the SP2010 master page code inserted into them, making it even harder to discern the reason for detaching in the first place, which will make them harder to migrate.  
• Detached web pages will come in with the SP2010 look/feel and incorrect formatting.  
• Web pages can be re-attached to their SP2010 page layout | • Ensure that all pages are re-attached prior to migrating them or creating a design package.  
• If the layout has moved to a different location (sub folder) the web page will attach to a different page layout with the same content type. |
| Some pages just don’t migrate and will have to be re-created manually | Use 2013 page layouts to recreate with the content from the old location. |
| Home pages with a filename other than default.aspx don’t migrate. SPO may use home.aspx within Site Pages and put some web parts on it. | As part of your audit notate the landing page naming convention so you can be prepared when migrating. This may even include manually recreated the pages. |

### Content Query Web Parts

<table>
<thead>
<tr>
<th>ISSUE</th>
<th>SOLUTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Will need to update GUIDs from within SP Designer</td>
<td>You will need to update the GUID from the new location list in SPD or recreate the webpart over again.</td>
</tr>
<tr>
<td>Failing to migrate the itemstyle.xsl file will result in all content query web parts pointing to custom item styles to revert back to “image on left”</td>
<td>Ensure that you have updated and migrated the itemstyle.xsl</td>
</tr>
<tr>
<td>For content query web parts, within web part zones, all filter dropdowns are reset to “no filter”.</td>
<td>The value on the other side of each operator remains, however. If you do nothing with the filter dropdowns, the next time you open the web part properties, the value on the other side of each operator will be blank. Regardless, the web part will continue to display the correct information on the page.</td>
</tr>
</tbody>
</table>
Solution Overview

Information Management Platform

- Migration - Increase Portability & Interoperability
- Administration - Analysis & Insights
- Security - Ensure Proper Access
- Architecture - Better Organization / Reduce Sprawl
- Protection - Backup & Recovery

Cloud On-Boarding Made Easy

- Zero server footprint truly agentless (cloud ready)
- Easy to install, intuitive design
- Rapid & self-evident value
- Single platform client, server, private or public cloud
- Enterprise grade without enterprise cost or effort
Highlighted Use Cases

Enterprise-wide use of MetaVis Migration 365 Suite for their own internal migration to Office 365 and on-going content management

Multiple business units use of MetaVis Architect Suite for multiple migrations and on-going content management of several versions of SharePoint

Enterprise-wide use of MetaVis Architect Suite for multiple migrations and on-going content management of several versions of SharePoint

Enterprise-wide use of Office 365 Suite for multiple migrations and on-going content management of several versions of SharePoint
Questions & Comments
Helpful Links

Building

- Company Information- www.buldingi.com
- One Drive- Migration Templates
- SlideShare- http://www.slideshare.net/metavistech

MetaVis TECHNOLOGIES

Product Information & Trials

- Migration Suite- www.metavistech.com/category/migration-suite

White Papers & Presentations

- SlideShare- www.slideshare.net/metavistech
- Blog- http://blog.metavistech.com/
Thank You & We Look Forward to Working Together!