SharePoint 2016 Pre-Migration Checklist

6-point pre-migration checklist to SharePoint 2016

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Upgrades or migrations entail a significant amount of investment of time and money, so before you go through the process, you need to assess your readiness first.

We have put together this handy 6-point pre-migration checklist so you can understand best practices for a successful Microsoft SharePoint 2016 migration. It is intended to help you perform a systematic and effective evaluation of your business collaboration tool requirements so you can maximise the success of your migration.

☑ PLAN FOR SUCCESS

Before jumping straight on the tools, take a moment to understand the impacts on your end users. New environment, new features, different URLs (possibly) are all things they will be confronted with. It is recommended that clear messaging goes out to all users to state the reasons for the migration, what is in it for them and what the risks are if not done.

Getting people involved early and throughout the project is a good way to establish and maintain user anticipation to something that is intended to be of benefit to them, and not just another change that your IT team is pushing on them.

☑ CONDUCT AN AUDIT

It is vitally important to understand what you are up against before performing a migration. The better your understanding of the current environment, the better and more accurate you can be when it comes to estimating delivery timelines, establishing deadlines and uncovering any potential risks or issues that you may be confronted with when the migration starts.

This data collection process should look at a minimum capture the details around the web applications, site collections, sites, lists and libraries in play. Key areas that need to be considered too include custom developed solutions, third party and native workflows as well as security settings.

In almost all cases, we provide a branding layer over the top of SharePoint to bring the look of the application in-line with company branding guidelines. In scenarios like this, it is important to understand how this solution was deployed and the assets (master pages, page layouts, style sheets, javascript files etc.) used in order to bring it across to your target 2016 environment.

☑ PERFORM A SPRING CLEAN

When speaking with our clients about the process and opportunities presented when migrating between SharePoint versions, we often use the analogy of moving house. To summarise, do you want to pack absolutely everything (even those items that you don't use any more) or do you only want to take the items that you need?

Translating this into SharePoint terms, there may be several project or committee sites that haven't been viewed or changed for a long period of time. Established or published documents might still have a heap of previous versions that are no longer needed. Lists might contain thousands of records that are no longer relevant. There might even be workflows lying around that were made but are not used.

This is a great opportunity to restructure your environment and remove any unneeded content.

☑ BUILD YOUR 2016 FARM

A little bit of thought and planning when building your shiny new SharePoint 2016 Farm is essential. Everything from the hardware specs, number and roles of the servers to the placement and configuration of service applications is something that we need to get right to ensure optimal performance and user satisfaction.

Keep in mind that this guide assumes that you are migrating from SharePoint 2013. If you are still running SharePoint 2010, you will need to build an intermediate SharePoint 2013 farm to migrate to first.

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Once the upgrade has been performed there, we can then repeat the process and migrate to SharePoint 2016.

When performing this task for our clients, we will always run a test migration first to get an idea of any blockers that may arise that weren't uncovered in the audit.

MIGRATE YOUR CONTENT

There are typically two ways that the migration can be done.

The database attach-upgrade is simply a case of bringing the databases across from the SQL instance of the old farm to the SQL instance of the new farm. This work is, in essence, a lift-and-shift exercise so if you are happy with bringing everything across, then this is the simplest approach.

CAUTION: Keep in mind, if you have decided not to do any clean-up or restructuring, then those issues will carry across to the new environment.

The granular migration approach is a lot more tedious and manual. You can most definitely leverage third party tools to make the task easier. However, it is a good way to perform a more selective and targeted migration.

Another key piece of work here is to run a full crawl over the new environment so that your new Search service application can respond accurately to users' search queries.

TEST, TEST AND TEST

Upon the completion of the migration, be sure to test everything. Users will lose faith in the work that has been done if all of a sudden, they do not have access to the files and content they did before. Be sure to confirm that any custom solutions that were brought into this new environment still function as expected and there are no broken links to content.

We will often organise a group of users from various teams or departments to go through and perform that testing for us.

IS IT TIME TO MIGRATE?

Upgrading to SharePoint 2016 and migrating potentially critical business information and processes is often a daunting and complex undertaking for many organisations. But if you are still using SharePoint 2007 or 2010, then you need to start planning for a migration ASAP because Microsoft no longer supports these versions. Your system is at risk and is highly susceptible to security and compatibility issues, so it's imperative not to be complacent and reactive only when problems arise.

Consider speaking to a SharePoint expert to help you understand how to mitigate risks and identify the appropriate migration path. Professional Advantage can assist you from planning your project, budgeting and project management, down to supporting your new SharePoint 2016 environment. We can also help you ensure end user adoption through our change management workshops.

Contact us today for a free migration analysis with one of our Solution Architects to help you get started.

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For more information

1800 126 499

www.pa.com.au

enquiries@pa.com.au

About Professional Advantage

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