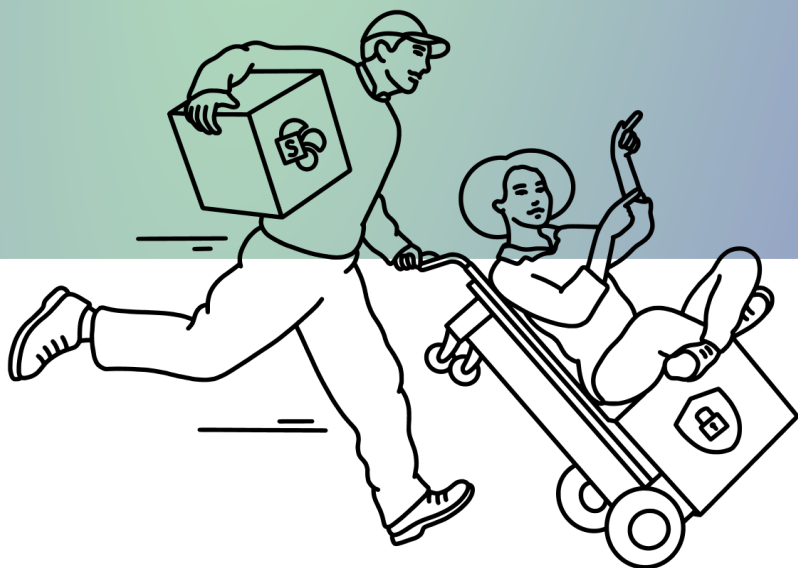


ShareGate:

The ultimate **SharePoint** migration checklist



Planning a SharePoint migration?
Make sure you're prepped for the anywhere workplace. With so many options, variables, and moving parts involved in a SharePoint migration, the entire process hinges on careful planning.

Whether you want to migrate to a newer version of SharePoint, to the Microsoft cloud, to another tenant—or just reorganize content, we're with you all the way.

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Since 2009, we've been helping IT professionals working in Microsoft simplify migrations. For every ounce of effort we've poured into our migration tool, an equal amount is dedicated to helping organizations get the most out of Microsoft 365.

We've created this checklist to make migration planning easy for you.

Ready to build a foolproof migration plan?

Follow these simple steps to save time and minimize risk.

What's in this checklist

Plan ahead

Choose your migration strategy

Prepare your migration

Step-by-step SharePoint migration

Take inventory

Clean up

Get ready

Prepare your users

Migrate

Post-migration

Modernize

Manage and secure

Microsoft 365 migrations. We got this.

The SharePoint migration tool built for IT admins

Plan ahead

The real work of a successful SharePoint migration is in the planning you do.

Regardless of the size and scope of your migration, a solid plan will help you avoid potential errors and ensure that the entire process runs smoothly.

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“Not having to go back and fix things manually and rebuild content saves us 15% of project time and helps make our larger projects possible. We couldn’t imagine doing this without ShareGate.”

– Doug Punchak, Application Development Manager,
Avvenire Solutions

Choose your migration strategy

There are two ways to migrate:

Several small steps: A phased approach to SharePoint migration allows you to move small sections of your environment at a time. During this type of migration, users can work continuously and keep productivity going.

® Did you know?

ShareGate's incremental copy feature allows you to move only what's changed since your last migration.

[See how it works here](#)

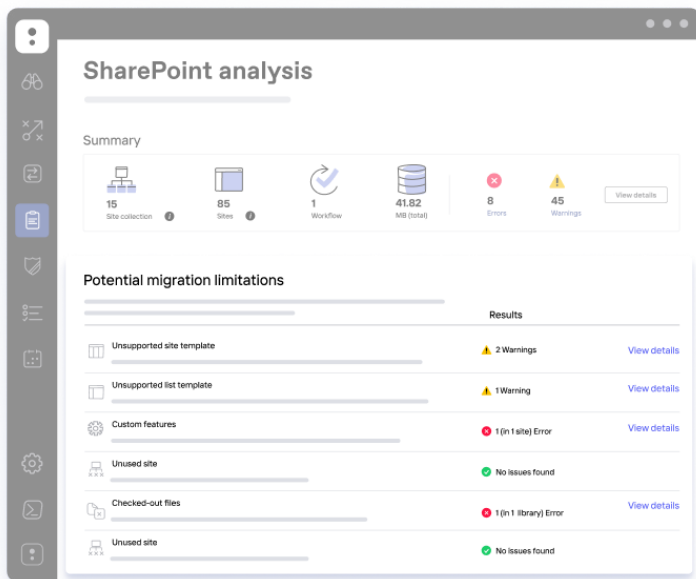
One giant leap: A single-event migration allows you to move your environment in one go. Although this approach reduces the time you spend on migration, it poses a higher risk. This is where a third-party tool comes in handy to automate the process and ensure the least possible impact on end users and your organization.

Prepare your migration

Run a source analysis to get a complete understanding of your environment's inventory and usage. With your free ShareGate trial, you can run a resource analysis to help you determine:

- The size of your environment
- The size of your file shares
- The number of site collections
- The number of sites
- The number of unused or abandoned sites
- The number of files and folders
- The number of workflows
- Potential issues

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Watch the demo

If you're ready to hit the ground running and want to fast-track your migration process, get started today with a full-featured trial of **ShareGate's migration tool**.

Step-by-step SharePoint migration

Whatever kind of SharePoint migration you're planning, if you're here, it's because you're ready to get started. But how should you do it? What should you move?

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Creating a detailed migration plan will help you answer these questions and more.

Here are the steps you'll want to follow.

Take inventory

Among the most important pre-migration steps is taking a complete inventory of your current environment.

This way, you can make better decisions about what to migrate and determine how long it will take to achieve a complete migration.

- ☐ Site collections
- ☐ Sites
- ☐ List and libraries
- ☐ Pages
- ☐ Shared files
- ☐ Tasks
- ☐ File size
- ☐ Documents
- ☐ Custom solutions
- ☐ Workflows
- ☐ Content types

- ☐ Site columns
- ☐ Templates
- ☐ Owners and permissions
- ☐ (Modern SharePoint) team site permissions through associated Microsoft 365 Groups
- ☐ User alerts
- ☐ Information protection policies
- ☐ Retention policies
- ☐ Records
- ☐ Users and groups used
- ☐ Large lists or libraries
- ☐ All files that have a dependency to another file using a URL
- ☐ Branding
- ☐ Any other UI customizations (JavaScript, altered menus, etc.)
- ☐ URL length

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Clean up

Time to roll up your sleeves and do some cleaning. With your users working in SharePoint every day, things can get messy fast. Once you have a solid inventory, start hammering away to weed out data that's redundant, unused, or no longer up to date. The goal is to migrate only what you need to create a more efficient environment that's easy to manage.

- ☐ Orphaned users
- ☐ Empty SharePoint groups
- ☐ Empty lists and libraries
- ☐ Unused custom content types, site columns, and workflows
- ☐ Sites that haven't been accessed or modified within a custom timeframe
- ☐ Duplicate content
- ☐ Items containing too many custom permissions
- ☐ Microsoft 365 Groups permissions

- ☐ Unwanted versions from your version history
- ☐ Recycle bin

Tips for cleaning up:

- ☐ Ask users to check in any document currently checked out, including those that have never been checked in (ensure you migrate the most recent version)
- ☐ Reorganize lists and libraries with too many columns
- ☐ Rethink and reorganize very large lists
- ☐ Promote sites to a site collection

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Get ready

A SharePoint migration is a timely opportunity for a fresh start. Before you move, you'll need to prep your new home. Spend some time planning and structuring your environment according to your needs.

- ☐ Create your new environment's architecture
- ☐ Create and configure SharePoint hub sites settings accordingly
- ☐ Optimize your new SharePoint Servers' performance (at the install)
- ☐ Configure all Web Applications – check desired authentication and authorization rules
- ☐ Back up everything
- ☐ Test the restore
- ☐ Check the database for corrupt data and delete any
- ☐ Run a test migration
 - ☐ Highlight any unsupported elements
 - ☐ Resolve issues that occurred
 - ☐ Determine migration speed
 - ☐ Create a migration schedule that works for you

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- ☐ Configure your new Search Topology
- ☐ Set SharePoint up to import user profiles from any specific sources
- ☐ Map a plan for the metadata on your content
 - ☐ Update your metadata, bulk additions or edits to metadata
 - ☐ Optimize mapping of templates, columns, or users
- ☐ Look at your customizations – if required, convert them to work in the new model /destination
- ☐ Establish a governance plan

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Tips for creating a governance plan:

- Define roles and responsibilities
- Classify your business information
- Configure guest access settings
- Review external access
- **Map permissions and metadata of users or groups** with ShareGate

Prepare your users

Throughout the migration, end-user training and communication are key factors to drive adoption. To achieve the best possible outcome, you'll want to make sure users understand the benefits behind the move. Determine what you'll offer in terms of training and support to set your team up for long-term success.

- ☐ Communicate your migration plan
 - ☐ Downtime planned
 - ☐ The reason for the change and the value for them
 - ☐ Possible changes in the environments
 - ☐ URL changes
 - ☐ SharePoint Sync
 - ☐ Bookmarks
 - ☐ Document references (Excel macros, etc.)
 - ☐ Estimated timeline
 - ☐ No working in the source location during migration
- ☐ Train users how to use SharePoint effectively
- ☐ Work with key users during migration

Migrate

It's essential to note the issues that arise during the migration and resolve them as needed. It's easier when you have the right tools that help to make sure your move is a successful one.

- ☐ Workflows
 - ☐ Complete or stop running workflows about to be migrated
- ☐ Use a third-party tool like PowerShell or ShareGate's migration tool to automate the process and restructure as you move
- ☐ Have a migration account with access to source and destination environments

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Post-migration

After making the move, you'll want to test everything out.

Ensure the migration was successful and that everything is where it should be.

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A post-migration checklist plays a big role in reducing headaches before and after you swing open the doors and let everyone in.

Post-migration

- ☐ Ensure everything migrated successfully
 - ☐ Use ShareGate's post-migration report feature to see all the details of your migration
- ☐ Test/run all workflows
- ☐ Check user permissions
- ☐ Create a backup of your new environment
- ☐ Switch source to read-only mode
- ☐ Remove access to the old SharePoint
- ☐ Run a full crawl
- ☐ Run a script to remove sharing links
- ☐ Get the migration approved by key users
- ☐ Check in with end users to see how they are adjusting to their new environment

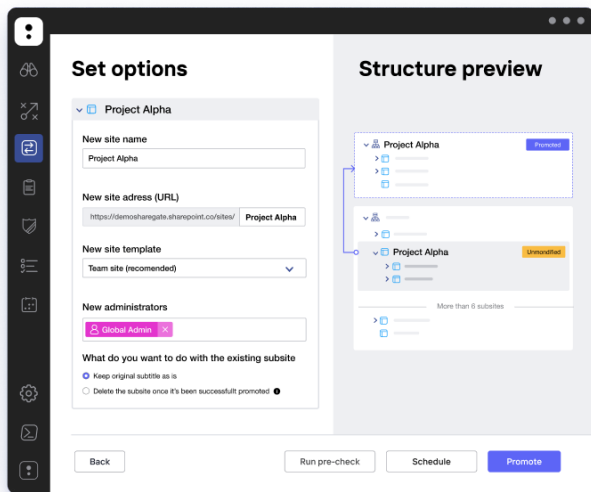
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Modernize

To take advantage of new collaboration tools in Microsoft 365, your site architecture needs to go from top-down to flat. When you modernize your SharePoint environment, it's easier to work with Teams and move things around as your organization evolves. Using SharePoint sites, Lists, and other content types for collaboration ensures your users can work better together, from anywhere.

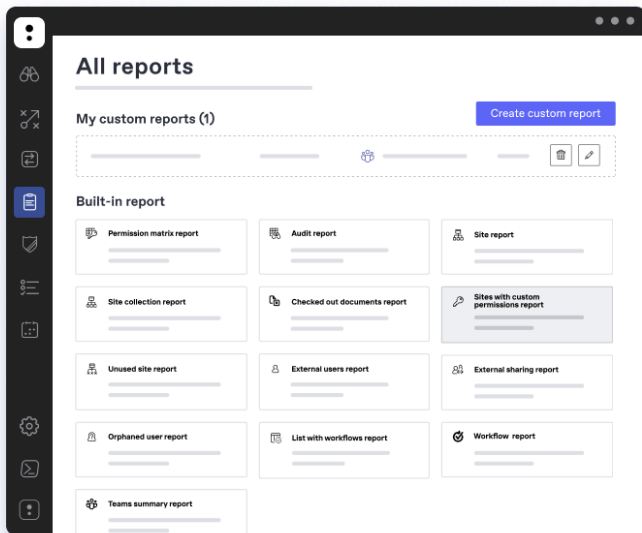
Instead of rebuilding what you already have, use a third-party tool like ShareGate to restructure your architecture in just a few clicks. **See this feature in action**

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Manage and secure

After completing your migration, run regular reports to keep an eye on what's happening in your environment, manage permissions, and make sure users are complying with your governance policies. The key to keeping on top of everything is automating and customizing SharePoint for your organization.



**“We don’t have any anxiety after the fact...
because we know that ShareGate just works.”**

– Doug Punchak, Application Development Manager,
Avvenire Solutions

Microsoft 365 migrations. We got this.

ShareGate's migration tool takes the heavy lifting out of your migration project. Intuitive features help you prepare, execute, and validate your move, whether you're migrating an entire environment or just a few lists.

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ShareGate:



The SharePoint migration tool built for IT admins

Tour ShareGate's full suite of migration features and learn how you can:

- Prepare your source for a snag-free migration and fix potential issues ahead of time
- Move data to the cloud at insane speeds and with minimal impact on your users
- Modernize your site architecture to enable modern workloads like Microsoft Teams
- Monitor your migration and see a summary of any warnings or errors that might have occurred
- All with award-winning ShareGate support

Try it for free

[Learn more](#)

For more helpful content written by
Microsoft experts, head over to
sharegate.com/blog

ShareGate:
by GSoft