Manulife SharePoint Content Migration



Manulife Migration Approach Document

**Prepared for**

Manulife

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**Prepared by**

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Revision and Signoff Sheet

Change Record

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Reviewers

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| Name | Version Approved | Position | Date |
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1. Introduction

The purpose of the document is to present the detailed process and plan for the migration of content from the Manulife’s CDN (MOSS 2007) and US (MOSS 2007) on premise farm to Manulife SharePoint Online tenant. Total size of content to be migrated is 7 TB.

The document includes:

* Environment Details
* Point of Contacts
* Migration Process
* Triage Process
* Wave Activities
* Sample Migration Findings

1. Objectives and Goals
   1. Business-Related Objectives

The objective of this engagement between Microsoft and Manulife to migrate existing content from the customer’s CDN and US on premise environment to SharePoint Online.

* 1. Migration Related Goals

The goals of the migration are:

* **Smooth transition for the users**: The migration process should ensure that the downtime for the users to use the sites is minimized.
* **Agreed Validation criteria is met:** The migration should ensure minimum data loss for the users. Content including (Sites, Lists\Libraries, Items\Documents, Groups, Permission) are migrated.
  1. Scope and Assumptions

MOSS 2007 SharePoint on premise environments are the source environments for the migration. As per the SoW there were 2 farms in scope which are US and CDN.

Please refer to the latest signed SoW for Scope, Out of Scope and Assumptions.

1. Migration Process
   1. Migration Pre-requisites

Following are the activities which need to be completed before initiating the migration of the content:

1. The Assess phase and the Remediation phase should be completed before start of migration phase.
2. All user accounts should be provisioned in the target Environment before the start of the migration.
3. User mapping should be finalized before the start of the migration.
4. Communication should be sent out to the users indicating the dates of the migration waves.
5. Site owners must be identified for each site collection which needs to be migrated.
6. Site owners for each wave should be informed and aligned to perform read only UAT testing post the migration.
7. All pre-requisite activities shared during the enable phase should be completed.
   1. Migration Strategy

Content will be migrated from the Manulife SharePoint on premise farms to Manulife SharePoint Online farm in multiple batches. These batches are called waves.

Content will be migrated from source environment to production environment; there will be no staging or test environment.

SharePoint Content will be migrated in two different manner called.

1. **In Band**
2. **Out Of Band.**
   * 1. In-Band

For In-Band each batch will comprise data up to 300 GB. Each wave will be of Six-week duration.

Migration will be performed across various stages – Pre-Prep week 1, Pre-Prep Week 2, Preparation, Migration, UAT, SOR and Go-Live. These phases are described in detail in the upcoming sub-sections.

* + 1. Out Of Band

For In-Band each batch will comprise data up to 150 GB. Each wave will be of Six-week duration.

Migration will be performed across various stages – Pre-Prep 1, Pre-Prep 2, Preparation, Migration, UAT and Go-Live. Please note that there will be no SOR for OOB content.

Content will be classified as OOB if following criterions are met:

1. Any list/library with more than 5000 Items/Documents including folders.
2. List/libraries requiring more than 5 versions (Up to maximum of 20 version)

Any site/ site collection exceeding 300 GB.

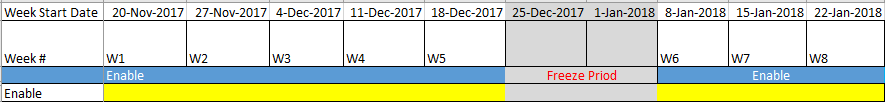
For more information on OOB and In-Band please refer SOW.

* 1. Migration Schedule

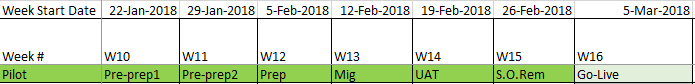
The Enable phase is of 10 weeks (Including freeze period). Complete migration phase schedule will be of 47 weeks (including 7 maintenance weeks). There will be total 1 Pilot wave, 14 In – Band waves and 22 OOB waves followed by 2 weeks of support in the end.

The complete schedule is depicted in the image below.

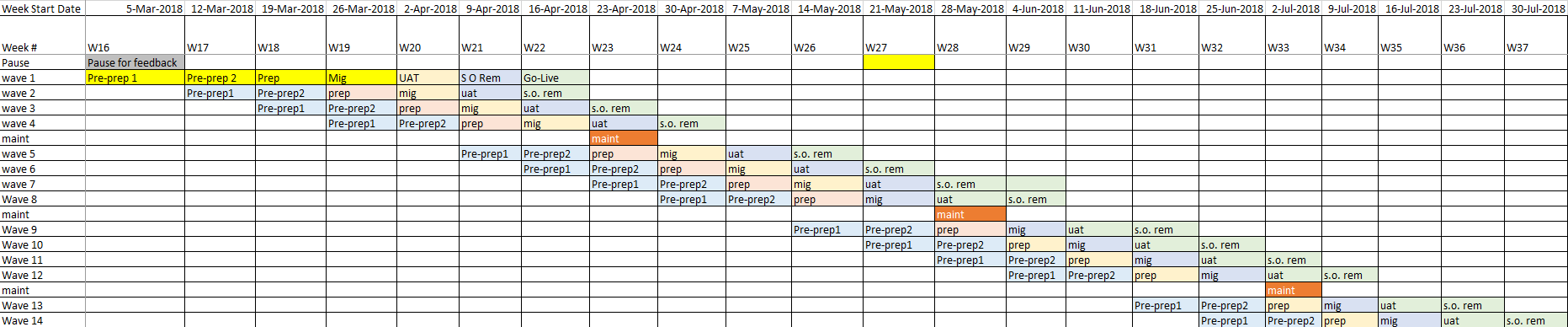
**Enable Phase:**



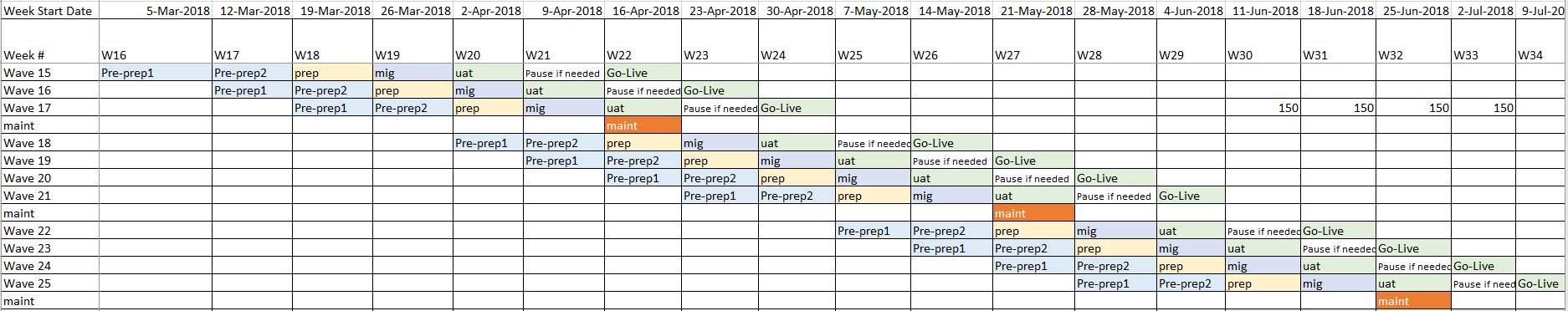
**Pilot Phase:**

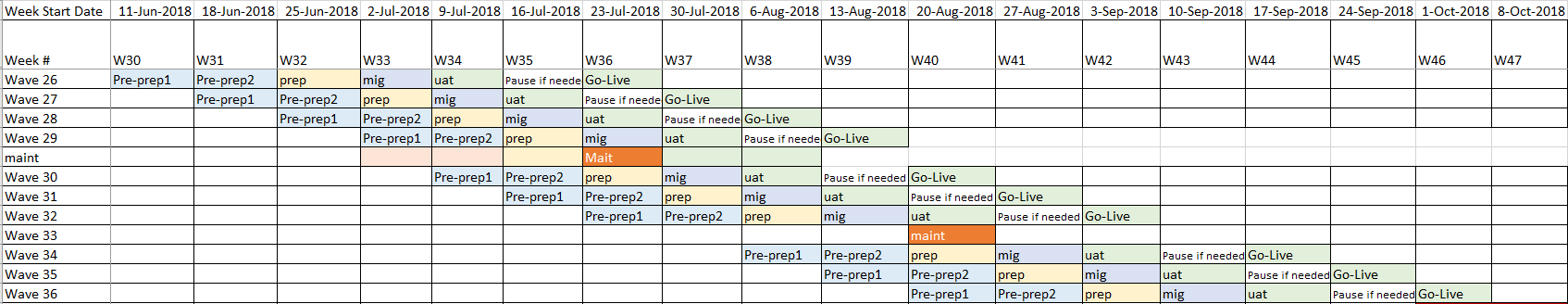


**In-Band Waves: (Please zoom in to 250% for clear image)**



**Out of band Waves: (Please zoom in to 250%)**

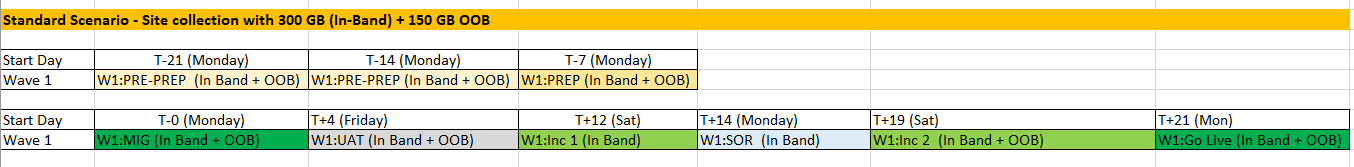




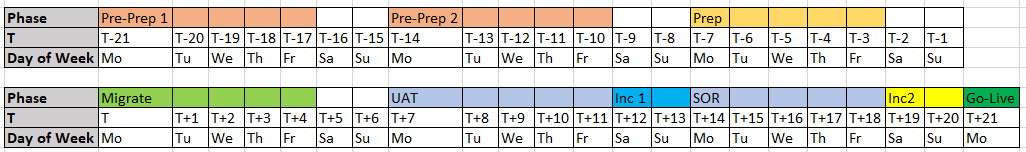
1. Migration Stages & Activities

This section describes all the phases involved in a wave. The section also outlines activities to be performed by Manulife and Microsoft migration team at various stages. Migration start day of every wave is being referred as “T”. T is Monday of migration week for every wave.

Here is the typical wave plan with start day of each phase for any wave. (Zoom in 150% for better clarity)



Following images depicts what “T” represents for a typical wave.



* 1. Pre-Preparation

Planning phase (or Pre-Prep) is starting phase of every wave. Duration of Pre-Prep phase is 2 weeks. Following are the activities to be performed during pre-prep week. During this phase, all planning activities related to Migration Wave are completed. The finalization and validation of Site Plan is carried out in this week.

* + 1. Week 1 - Pre -Prep 1

This is the Week 1 of migration. Following tables explain the Pre-Prep week activities in detail.

**Week 1:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **S. No.** | **Activity** | **Owner** | **Timeline (IST)** | **TimeLine (EST)** |
|  | Provide Final Site Plan with In-Band and OOB content. | Manulife | Complete by Tuesday 3:30 AM IST (T-20) | Complete by Monday 5:00 PM EST (T-20) |
|  | Validate Site plan content | Microsoft Onsite | Complete by Thursday 3:30 AM IST (T-18) | Complete by Wednesday 5:00 PM EST (T-18) |
|  | Provide revised Site Plan (if issues found during verification or there is any re-planning required) | Manulife | Complete by Friday 3:30 AM IST (T-18) | Complete by Thursday 5:00 PM EST (T-18) |
|  | Upload Content DBs | Manulife | Complete by Saturday 3:30 AM IST (T-17) | Complete by Friday 5:00 PM EST (T-17) |
|  | Provide Site Collection Admins access to source site | Manulife | Complete by Saturday 3:30 AM IST (T-17) | Complete by Friday 5:00 PM EST (T-17) |

**Please note:**

* Wave planning should be done keeping in mind the capacity for In-Band and OOB content. Capacity for In-Band is 300 +/- 50 GB and OOB is 150 +/- 50 GB.
* If there is OOB content in Site collections which are planned to go in In-Band. Such OOB content should be planned in the same week’s OOB wave. It is highly recommended that OOB content should not be kept for future waves.
* Migration team will make entire site source collection read-only at the end of In-Band which is before incremental. Due to this any lists/library planned for OOB in the same site collection will also become read-only. Thus, if OOB lists/libraries are not migrated in the same week’s OOB wave, site owners will not have any place where they can add/update content for such lists.
* If it is found that OOB content for a wave is exceeding 150 GB re-planning may be required. Re-planning may include removal of some sites with large OOB content and adding some sites with less OOB content.
* If it’s not possible to remove sites, then migration team will confirm if larger than 150 GB content can be taken for the given wave. The decision will be based on available machine and resource capacity for given OOB wave.
* Site plan must be provided in the attached format.



* To upload Content DBs please refer section 6.6 Content DB Upload
  + 1. Week 2 - Pre -Prep 2

Once all the site collections are finalized and content DBs are uploaded Microsoft will download content DBs from Azure Blob Storage and restore those content DBs on SQL Server.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **S. No.** | **Activity** | **Owner** | **Timeline (IST)** | **TimeLine (EST)** |
|  | Initiate internal **communication** with end users for the upcoming migration | **Manulife** | Complete by Tuesday 3:30 AM IST (T-14) | Complete by Monday 5:00 PM EST (T-14) |
|  | **Restore** Content Database in Azure Environment.  Validate that the sites are opening in the Metalogix and raise concerns if any to Manulife | **Microsoft Offshore** | Complete by Wednesday 5:00 PM IST (T-12) | Complete by Wednesday 6:30 AM EST (T-12) |

* 1. Prepare

This is the week 3 of migration. In this week, all preparation activities related to migration are covered. The site collections are created. The Structure and Permission Jobs are executed, and issues related to structure are remediated. In this week first communication from Migration Management App will be sent to Content Owners and Technical Owners informing about the migration schedule and UAT timelines.

Following tables explain the Preparation week activities in detail.

**Week 2 Preparation (Manulife):**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **S. No.** | **Activity** | **Owner** | **Timeline (IST)** | **TimeLine (EST)** |
|  | Validate Banner #1 applied by Microsoft Team | Manulife | Complete by Wednesday 3:30 AM IST (T-5) | Complete by Tuesday 5:00 PM EST (T-5) |
|  | Validate Email #1 sent to Site Owners for Start of Migration | Manulife | Complete by Wednesday 3:30 AM IST (T-5) | Complete by Tuesday 5:00 PM EST (T-5) |

**Week 2 Preparation (Microsoft):**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **S. No.** | **Activity** | **Owner** | **Timeline (IST)** | **TimeLine (EST)** |
|  | Create Target Site Collection,  Feature Activation | Microsoft | Complete by Monday 5:00 PM IST (T-7) | Complete by Monday 6:30 AM EST(T-7) |
|  | Apply Banner #1 on site collection of current wave | Microsoft | Complete by Tuesday 7:30 PM IST (T-6) | Complete by Tuesday 9:00 AM EST (T-6) |
|  | Initiate Email #1 from Migration Management App | Microsoft | Complete by Tuesday 7:30 PM IST (T-6) | Complete by Tuesday 9:00 AM EST (T-6) |
|  | Structure and Permission Migration  Create Jobs  Execute Jobs  Validation & Fix | Microsoft | Complete by Friday 6:00 PM IST (T-3) | Complete by Friday 7:30 AM EST (T-3) |

* 1. Migration

This is the week 4 of Migration. Once preparation activities are complete, actual (Content) Migration is started. On Monday morning (IST) of each migration week 4, Microsoft team will start running Content jobs in Metalogix. Jobs will be monitored closely by Microsoft team on 24/7 basis (i.e. sharing between off-shore & On-site Team). The jobs will usually take 3-3.5 days to complete (The duration of the jobs will vary depending upon the complexity of the site/actual throughput). Microsoft team will monitor jobs for any failure or any error.

For OOB content also the jobs will be triggered in this week. However due to the nature of content for OOB, there is a chance that some jobs may take longer than a week to finish. All such instances will be communicated to Manulife by Email.

End of Migration Week 4, the migrated content will be released to Manulife for verification along with the Wave Migration Reports. Migration validation will be performed by Microsoft migration team prior to releasing the sites to end users. Refer to section on Validation Scenario for more details. Following reports will be shared by Microsoft with Manulife. Please refer the section **11.4 Sample Migration Reports.** Please refer the Read-Me section of the attached reports for more details.

1. **Content Migration Report**
2. **Navigation Mismatch Report**
3. **Site Mismatch Report**
4. **InfoPath Report**
5. **Source Never Checked-In Files**
6. **Workflows**
7. **Permission Report**
8. **Web Part Mismatch Report**
9. **Content Types Reports**

All the reports will be uploaded to following SharePoint site.

https://mfc.sharepoint.com/sites/MigrationDefectTracking/WaveReports

For OOB content status will be shared via E-Mail once jobs are finished and migration team is done with remediation.

**Week 4 Migration (Manulife):**

No Activities for Manulife during this period.

**Week 4 Migration (Microsoft):**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **S. No.** | **Activity** | **Owner** | **Timeline (IST)** | **TimeLine (EST)** |
| 1. | Content Migration  Create Jobs  Execute Jobs | Microsoft | Complete by Thursday 5:00 PM IST (T+3) | Complete by Thursday 6:30 AM EST (T+3) |
| 2. | Remediation  Run validation tool  Perform Manual Validations  Generate reports | Microsoft | Complete by Week 4, Friday 5:00 PM IST (T+4) | Complete by Week 4 Friday 6:30 AM EST (T+4) |

* 1. UAT

In the week 4 Friday EST morning, migrated content will be available for verification to Manulife. Manulife will have until Wednesday (T+9) to report any **P1 and P2** issues related to the migrated content. Any **P3 and P4** type of issue can still be logged in after Wednesday.

Manulife team is expected to report any issues immediately in Migration Management App issue list as and when they discover those issues. Microsoft team will work during this (Monday – Friday) duration to fix issues reported by Manulife.

For OOB content UAT will start as soon the jobs are finished and migration team is done with remediation. Microsoft will inform SPOC via e-mail about completion of OOB jobs.

**Week 5 UAT (Manulife):**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **S. No.** | **Activity** | **Owner** | **Timeline (IST)** | **TimeLine (EST)** |
| 1. | Validate Email #2 sent to Content Owner that site collections are open for UAT. | Manulife | Complete by Friday 7:30 PM IST (T+4) | Complete by Friday 9:00 AM EST (T+4) |
| 2. | UAT Active: Content Owners to Validate the Site and raise issues.  Stakeholders to attend Issues Triage Calls  UAT issue reporting closes Thursday Close of Business | Manulife | Complete by Friday 4:30 AM IST (T+4) | Complete by Thursday 5:00 PM CT (T+4) |
| 3 | Attend Daily Triage Call | Manulife | Daily Call | Daily Call |

**Week 5 UAT (Microsoft):**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **S. No.** | **Activity** | **Owner** | **Timeline (IST)** | **TimeLine (EST)** |
| 1. | Releases sites for UAT and Send email to Manulife Team with Wave Migration Report. Email communication will be sent out to SPOC | Microsoft | Complete by Friday 5:00 PM IST (T+4) | Complete by Friday 6:30 AM EST (T+4) |
| 2. | Initiate Email #2 from Migration Management App for UAT | Microsoft | Complete by Monday 7:30 PM IST (T+7) | Complete by Monday 9:00 AM EST (T+7) |
| 3. | Attend Daily Triage Call | Microsoft | Daily Call | Daily Call |
| 4. | Resolve Triaged Issues | Microsoft | Complete by Friday 5:00 PM IST (T+ 11) | Complete by Friday 6:30 AM EST (T+ 11) |
| 6. | Preparation for Incremental Migration 1 | Microsoft | Complete by Friday 5:00 PM IST (T+ 11) | Complete by Friday 6:30 AM EST (T+ 11) |
| 7. | Execute Incremental Migration 1 | Microsoft | Start by Saturday 5:30 am IST | Start by Friday 7:00 pm EST |

* 1. Incremental 1

At the end of the week 5, Incremental migration will be carried out over the weekend. Any structural changes after the content database is backed up will not be migrated. Structural changes include but is not limited to changes/additions to site, workflows, lists, content types etc.

For OOB there will not be any incremental on live sites.

**Week 5 Incremental 1 (Microsoft):**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **S. No.** | **Activity** | **Owner** | **Timeline (IST)** | **TimeLine (EST)** |
|  | Preparation for Incremental Migration 1 | Microsoft | Complete by Friday 5:00 PM IST (T+ 11) | Complete by Friday 6:30 AM EST (T+ 11) |
|  | Execute Incremental Migration 1 | Microsoft | Start by Saturday 5:30 am IST (T+ 12) | Start by Friday 7:00 pm EST (T+ 12) |

* 1. SOR

In the week 6 Monday EST morning (T+14), Site owners will again resume site content validation. Manulife will have until Wednesday (T+16) to report any **P1 and P2** issues related to the migrated content. Any **P3 and P4** type of issue can still be logged in after **Wednesday**.

Manulife team is expected to report any issues immediately in Migration Management App issue list as and when they discover those issues. Microsoft team will work during this (Monday – Friday) duration to fix issues reported by Manulife.

For OOB there will not be any SOR Week.

**Week 6 SOR (Manulife):**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **S. No.** | **Activity** | **Owner** | **Timeline (IST)** | **TimeLine (EST)** |
| 1. | Validate Email #3 sent to Content Owner that site collections are open for SOR. | Manulife | Complete by Monday 7:30 PM IST (T+14) | Complete by Monday 9:00 AM EST (T+14) |
| 2. | SOR Active: Content Owners to Validate the Site and raise issues.  Stakeholders to attend Issues Triage Calls  UAT issue reporting closes Wednesday Close of Business | Manulife | Complete by Thursday 4:30 AM IST (T+16) | Complete by Wednesday 5:00 PM CT (T+16) |
| 3 | Attend Daily Triage Call | Manulife | Daily Call | Daily Call |
| 4. | UAT Go/No-Go | Manulife | Complete by Saturday 2:30 AM IST (T+18) | Complete by Friday 4:00 PM EST (T+18) |

**Week 6 SOR (Microsoft):**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **S. No.** | **Activity** | **Owner** | **Timeline (IST)** | **TimeLine (EST)** |
|  | Initiate Email #3 from Migration Management App for SOR | Microsoft | Complete by Monday 7:30 PM IST (T+14) | Complete by Monday 9:00 AM EST (T+14) |
|  | Attend Daily Triage Call | Microsoft | Daily Call | Daily Call |
|  | Resolve Triaged Issues | Microsoft | Complete by Friday 5:00 PM IST  (T+18) | Complete by Friday 6:30 AM EST  (T+18) |
|  | UAT Go/No-Go | Microsoft | Complete by Saturday 1:30 AM IST (T+18) | Complete by Friday 4:00 PM EST (T+18) |

* 1. Incremental 2

At the end of the week 6 - by Friday 5PM EST- Manulife team will make the source site collections “Read-Only”. Then Microsoft team will start incremental migrations.

Incremental migration will be carried out over the weekend after the sites are locked. Any structural changes after the content database is backed up will not be migrated. Structural changes include but is not limited to changes/additions to site, workflows, lists, content types etc.

**Incremental for OOB will be performed in this weekend for a wave. Please note that**

1. OOB content may run longer than expected timeframe.
2. Incremental date for OOB content is always tentative.

**Week 6 Incremental 2 (Manulife):**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **S. No.** | **Activity** | **Owner** | **Timeline (IST)** | **TimeLine (EST)** |
| 1. | Lock sites to start incremental. | Manulife | Complete by Saturday 2:30 AM IST (T+18) | Complete by Friday 5:00 PM EST (T+18) |

**Week 6 Incremental 2 (Microsoft):**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **S. No.** | **Activity** | **Owner** | **Timeline (IST)** | **TimeLine (EST)** |
|  | Preparation for Incremental Migration 2 | Microsoft | Complete by Friday 5:00 PM IST (T+ 18) | Complete by Friday 6:30 AM EST (T+ 18) |
|  | Execute Incremental Migration 2 | Microsoft | Start by Saturday 5:30 am IST (T+ 18) | Start by Friday 7:00 pm EST (T+ 18) |

* 1. Go Live

This is the week 7 of migration wave. Microsoft team will complete the incremental migration, perform validations and share the Site Collection lists with Manulife. The Manulife team needs to validate the banner and communicate to user for Go Live.

OOB content go-live will happen along with In-Band go live.

**Week 7 Go-Live (Manulife):**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **S. No.** | **Activity** | **Owner** | **Timeline (IST)** | **TimeLine (EST)** |
| 1. | Unlock Sites for banner application. Lock After banner application is run and sanity check is performed. | Manulife | Post email received from Microsoft generally by Monday 7:30 PM IST (T+21) | Post email received from Microsoft generally by Monday 9:00 AM EST (T+21) |
| 3. | Communicate End Users to start using the Target Environment | Manulife | Post email received from Microsoft generally by Monday 7:30 PM IST (T+21) | Post email received from Microsoft generally by Monday 9:00 AM EST (T+21) |
| 4. | Validate Email #3 sent to Content Owner that site collections Live. | Manulife | Post email received from Microsoft generally by Monday 7:30 PM IST (T+21) | Post email received from Microsoft generally by Monday 9:00 AM EST (T+21) |

**Week 5 Go-Live (Microsoft):**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **S. No.** | **Activity** | **Owner** | **Timeline (IST)** | **TimeLine (EST)** |
| 1. | Complete Incremental Migration and hand over target sites. | Microsoft | Complete by Monday 7:30 PM IST (T+21) | Complete by Monday 9:00 AM EST (T+21) |
| 2. | Initiate Email #3 from Migration Management App for Go Live to Content Owners | Microsoft | Complete by Monday 7:30 PM IST (T+21) | Complete by Monday 9:00 AM EST (T+21) |
| 3. | Apply banner #2 on the Go Live Site collections | Microsoft | Complete by Monday 6:00 PM IST (T+21) | Complete by Monday 7:30 AM EST (T+21) |

* 1. Maintenance

Maintenance weeks allows the Microsoft Migration team to perform several necessary activities, as required at that time. Such as:

* + Updates and patch deployments for the machines and tools.
  + Clean up old content, logs, databases from Migration environment.
  + Update User mapping file if Manulife provides a new one.

In this week, NO content Migration will be carried out. Other activities for previously running wave and upcoming wave will be carried out. (Pre-Prep1, Pre-Prep2, Preparation, UAT, SOR and Go Live)

* 1. Large Site Collection Migration (More than 350 GB)

During enable phase it was found that it’s not possible to make site collections read-only in partially like at sub-site level. Due to that splitting large site collection in smaller chunks is not possible.

Large site collections that are not going out of band (let’s call this “**Large Band**”) is stretched during the content migration weeks based on the amount of content exceeding ~350 GB.  Each additional ~350 GB will result in an additional week added on to the migration wave.  In this way, Large band waves will be

1. **7-week Large Band Wave:** Following are some instances found for such site collections.
   1. <http://centralsharepoint/ii> (415 GB, -22 GB of large lists OOB)
   2. <http://mfcglobalinv/pm> (460 GB -20 GB of large lists OOB)
   3. <http://centralsharepoint2/invops1> (527 GB -380 GB large lists OOB – this can likely go velocity)
   4. <http://centralsharepoint/mbps> (730 GB -123 GB large lists OOB)
2. **8-week Large Band Wave** (*but not really, as both will be 7 weeks once OOB content is accounted for)*
   1. USShared (840 GB)
      1. Note that the top ten large lists by storage footprint found in USShared account for 200 GBs of content. That likely pushes this to 7 weeks.
   2. USLife (1.05 TB)
      1. Note that the top ten large lists by storage footprint found in USLife account for 650 GBs of content.   That likely pushes this to 7 weeks – it really may make more sense to take the entire site collection out of band.
      2. <http://uslife.mtl.manulife.com/LifeOps/SPIM/RIPData/Shared> Documents alone is 450 GBs of the 1.05 TB.

For Large Band waves:

1. The first ~350 GBs of content are migrated and start their UAT as with a typical velocity wave (orange ‘Migration Webs A-M’ cell)
2. Another ‘wave’ of 350 GBs of content are migrated on the following Monday (green ‘Migration Webs N-Z’ cell) while the first 350 GBs are undergoing UAT.
3. Incremental migrations are done the same as with a typical velocity wave, but additional incremental is completed during post-SOR weeks to ensure that the final incremental can be completed in a single weekend.
4. Go live for the entire site collection occurs Monday of the final week.

So, in summary,

* In-band site collections will be migrated via a velocity wave that takes exactly 6 weeks.
* Out of band content and site collections will be migrated via the out of band process which takes a minimum of six weeks, with no maximum based on the amount of content.
* Large Band site collections will be migrated via the Large band process that will take 7 weeks.
* For large band waves, the read-only gap is the same as with a typical velocity wave – only the final weekend during the read only incremental.  Owners with a web in A-M in the example above, would have a week of waiting with no responsibilities assigned (M6-F6), however, the source site collection can still be written to at that time.  Once the SOR week has completed for Webs N-Z, the entire site collection (webs A-Z) will be set to read only for the final incremental, and go live on that Monday.

1. Point of Contacts
   1. Microsoft

Below is a list of contacts in case issues are discovered during migrations. Between the hours of 8 AM EST to 6 PM EST please use the contacts in the order they are listed below starting with Darshit. In case an emergency arises that cannot wait for business hours listed above please contact other resources listed below.

|  |  |  |  |
| --- | --- | --- | --- |
| Role | Contact | Email | Time zone |
| Onsite Coordinator | Darshit Shah | dashah@microsoft.com | EST |
| MCS Consultant | Conor Sweeney | Conor.Sweeney@microsoft.com | EST |
| Project Manager | Paul Jacks | pajac@microsoft.com | MST |
| Offshore Lead | Sourabh Goyal | [sogoyal@microsoft.com](mailto:sogoyal@microsoft.com) | India, IST |
| Project Manager | Navita Kosta | navitak@microsoft.com | India, IST |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Role | | Contact | Email | Time zone |
| US Helpdesk | 1-877-472-5005 | | [North\_American\_Service\_Desk\_Mailbox@Manulife.com](mailto:North_American_Service_Desk_Mailbox@Manulife.com) | EST |
| Canada Helpdesk | 1-888-990-9917 | | [North\_American\_Service\_Desk\_Mailbox@Manulife.com](mailto:North_American_Service_Desk_Mailbox@Manulife.com) | EST |
| Ming Li |  | | [MingLi\_Ooi@manulife.com](mailto:MingLi_Ooi@manulife.com) | EST |

* 1. Manulife Contacts

1. Technical Details

This section provides details regarding the environments that will be used for the migration. Following diagram depicts the Environment Details.

* 1. Source Environment

Manulife SharePoint (MOSS 2007) on-premise environments are source environments for the migration. As per SoW, there are two farms consist of overall data volume approximately 7 TB. Manulife has been in-process to perform remediation activities in source to make them compatible prior migrating to target environment.

Following are the details of the Environment which are currently in Scope. Manulife requested to perform sample migration on UAT site collections, however Manulife later provided additional 2 site collections from Production environments upon request from Microsoft.

|  |  |  |
| --- | --- | --- |
| **SL. No.** | **Farm Name** | **SP Version** |
| **1** | CDN | MOSS 2007 |
| **2** | US | MOSS 2007 |

**Accounts:** Manulife has provided 5 accounts to access source environment. Two accounts will be granted site collection admin during Pre-Prep week 1 before start of a wave.

Following are the details of source accounts.

|  |  |  |
| --- | --- | --- |
| **Account** | **Connect to** | **Role** |
| mliddomain1\spsyncadm1  mliddomain1\spsyncadm2  mliddomain1\spsyncadm3  mliddomain1\spsyncadm4  mliddomain1\spsyncadm5 | Source (Connect using MEWS 8.5.0.3 for Tools and Incremental for Migration waves)  Incremental machines (Sync servers) | Site Collection Admins (spsyncadm1 and spsyncadm2)  All 5 accounts - Local administrator of 15 incremental machines (Sync servers) |

2 accounts with admin access to the source production environment will be used for the migration.

* 1. Target Environment

Manulife Office 365 SharePoint Online (SPO) environment is the target environment for the migration. Following are the details of the same.

|  |  |
| --- | --- |
| URL | Site Type |
| https://mfc-admin.sharepoint.com | SharePoint Online admin site |
| https://mfc.sharepoint.com | Root site collection. |
| https://mfc.sharepoint.com/sites/<<sitecollction>> | Target site collection format |

* Manulife will provide URL mapping for source and target site collection.
* Microsoft will provision all the Target site collections. Size of the site collections on the target will be double of that of source site collection.
* While provisioning **SPMigration** AD Group will be added to all the site collections as Site Collection admin on target sites.

**Target Accounts:**

Microsoft will need 30 accounts to perform migration activities. All these 30 accounts are part of **SPMigration** AD Group and will have site collection admin access on target site collection.

|  |  |  |
| --- | --- | --- |
| **Connect to** | **Type** | **Role** |
| [SPOTest1@MFCGD.com](mailto:SPOTest1@MFCGD.com), [SPOTest2@MFCGD.com](mailto:SPOTest2@MFCGD.com),  …  [SPOTEST30@mfcgd.com](mailto:SPOTEST30@mfcgd.com) | SPO Users | Site Collection Admins – to perform migration activities. |
| [shdarsh@MFCGD.COM](mailto:shdarsh@MFCGD.COM)  [goyasou@MFCGD.COM](mailto:goyasou@MFCGD.COM)  [tirumsa@MFCGD.COM](mailto:tirumsa@MFCGD.COM)  [murusan@MFCGD.COM](mailto:murusan@MFCGD.COM)  [singtaa@MFCGD.COM](mailto:singtaa@MFCGD.COM) | SPO Users | SPO Admin - to perform activities using higher privilege such as provisioning site collection in SPO tenant. |
| SPMigration | AD Group | AD Group containing all the 30 Accounts |
| i:0#.f|membership|spmigrate@mfcgd.com | SPO User | Default account to map missing users from source. If any user is not present in the target or in User Mapping file, such user will be mapped to this default account in target. |

* 1. Microsoft Azure Migration Servers

The migration servers are hosted on Microsoft Azure Subscription. Following is the detail.

|  |  |  |
| --- | --- | --- |
| **No.** | **VM Name** | **Role** |
| 1 | MLSQL1 | SQL Server Database for Content Databases. |
| 2 | MLSQL2 | SQL Server Database for Migration Logs. Instance name is JOBS |
| 3 | MLWORKER1  MLWORKER2  …  MLWORKER30 | VM to run migration jobs |

* 1. Manulife Migration Servers

These migration servers will be used to run utilities and incremental migration. These servers are hosted with in Manulife Environment. Following is the details.

All the accounts mentioned in section **6.1 Source Environment** will have local admin access in migration VMs.

|  |  |  |
| --- | --- | --- |
| **No.** | **VM Name** | **Role** |
| 1 | CPCWVGISMSPP07 | SQL Server Database for Migration Logs. Instance name is JOBS |
| 2 | CPCWVGISMSPP08  CPCWVGISMSPP09  CPCWVGISMSPP10  CPCWVGISMSPP11  CPCWVGISMSPP12  CPCWVGISMSPP18  CPCWVGISMSPP20  CPCWVGISMSPP22  CPCWVGISMSPP26  CPCWVGISMSPP28  CPCWVGISMSPP29  CPCWVGISMSPP30  CPCWVGISMSPP31  CPCWVGISMSPP32 | Migration VMs |

* 1. Metalogix Content Matrix

The migration will be performed using a licensed version of the Metalogix Content Matrix: SharePoint Edition 8.5.0.4.

For incremental MEWS Version 8.5.0.3 has been installed on both US and Canada Farms.

* 1. Content DB Upload

Manulife decided to upload content data using AzCopy upload operation. Microsoft initially shared AzCopy command including encoded SAS token to upload content data manually and Manulife was able to upload content data for sample migration successfully with good network bandwidth. As per Manulife’s request to reduce overhead of uploading database chunks manually, Microsoft suggested to use “Microsoft Storage Azure Explorer” tool to upload single folder that consists of all the content database chunk in it.

**Approach 1)** The following AzCopy Manual approach document was shared with Manulife -



**Approach 2)** The following automated approach to upload content database using “Microsoft Storage Azure Explorer” was shared with Manulife –



The approach document consists of the following items –

1. Page #1 - Steps and detail regarding “Migration Azure Storage Explorer” – How to install, connect azure storage, upload parent folder, monitor and troubleshoot with retry.
2. Page #2 - Test with big dummy database using script

As of now, Manulife has tested this automated approach using 700 GBs dummy content.

With both the approaches to upload content database to Azure Blob Storage, Microsoft has shared encoded SAS token through policy instead of sharing storage key. Microsoft plans to re-issue this SAS token through policy for better security on timely manner. Microsoft will keep sharing new SAS token with Manulife on timely manner and thus all the old tokens will be expired.

Content data must be made available to Microsoft team in Azure Storage by end of pre-prep week #1 (N-3 week) for every wave so that Microsoft team has enough time to restore and validate the content.

Microsoft team will download and restore the database to validate that Metalogix Content Matrix is able to successfully read the sites present in the database within 5 business days of Content Database availability in Azure Storage and Site Plan. If there are any issues with Database, Manulife has to reconfirm on the Site Plan and other pre-requisites at pre-prep week #2 (N-2 week) during weekdays as per migration approach and ensure that the content is uploaded. If there are issues at that point with the content, best available approach must be taken quickly at that point by Manulife so that there is no impact on schedule.

* 1. Locking Source Site

The Source site collections need to be locked before the incremental migration is started so that there are no updates on the source which do not get carried forward to target. These site collections will be in locked state going forward.

The source site collection will be locked on Friday of Migration week in the wave and any changes post that will not be migrated to target environment. The locking activity will be done by the Manulife team.

**Placeholder to be replaced:** Lock site commands and user guide

* 1. Maintenance Schedule

It is assumed that the Source, Target connectivity and Incremental machines (Sync Servers) are available without any downtime during the migration schedule of the project. Manulife must do MOSS 2007 server restart every week. Following is the schedule.

**Manulife Maintenance Schedule**

|  |  |  |
| --- | --- | --- |
| No. | Downtime Planned Scheduled | Notes |
| 1 | Fridays 3:30am-6:00am EST | These server refresh activities are scheduled for every week. |

Microsoft need to be informed in advance about any planned downtime. Any source or target un-availability due to any reason will block migration activities and may have schedule impact.

1. UAT and Triage Process
   1. User Acceptance Testing

The sites will be available for UAT and SOR weeks for review to content owner and site owners for a duration of 9 days. The content owners and the users must validate the content during this duration and report issues into the issue tracking location which will be shared with them via email communication.

The Target Site Collections will be a Read-Only validation, users will have permissions to modify the content but should refrain from modifying or adding anything to the new environment. Modifications during the validations will break the migration process or generate false reports.

* 1. Triage Process

All the issues which are logged, are taken up for discussion by Manulife and the Microsoft Project Team. A daily meeting will be scheduled for issue triage Monday - Thursday during the Week of UAT of the Wave.

In Triage following to 3 questions will be considered:

**Is this a valid migration issue?**

Only the issues related to content migration will be considered as valid issues. Issues will not be considered valid if they are related to customizations, deprecated features, new feature request or not in scope as per the signed SoW.

**What is the Severity of the Issue?**

The severity will be defined based on the Impact of the issues. The severity needs to be agreed by both Manulife and Microsoft Team.

**Who’s responsible to resolve the issue?**

In case it is a valid P1 or P2 issue, it will be assigned to Microsoft Team. If it is an invalid bug or falls under the list of activities to be performed post go live then it will be assigned to the creator of the bug. All out of scope issues and new features will be assigned to creator.

Only the issues which have completed triage and assigned to Microsoft team will be worked upon by Microsoft team.

It is recommended that Manulife Team reviews the issues raised before the triage meeting to cover important bugs which have business impact.

* 1. Priority

As defects are identified during testing, the defect priority will be jointly agreed upon by the Manulife and Microsoft. Microsoft team will triage the defect and fix all in scope P1 and P2 defects. Defect severities are shown in the following table.

|  |  |
| --- | --- |
| Defect Priority | **Description of Priority and associated Business Impact** |
| P1 (Critical) | Showstopper defect. Development, testing, or production launch cannot proceed until  the defect is corrected.  Must fix as soon as possible. The defect is blocking further progress in this area.  The solution cannot ship, and the project team cannot achieve the next milestone. |
| P2 (Major) | The defect must be fixed before moving to production.  Does not affect test plan implementation. |
| P3 (Minor) | It is important to correct the defect. However, it is possible to move forward into  production by using a workaround.  Does not affect functionality as designed (for example, message change in user  experience program). |
| P4 (Trivial) | Feature enhancement or cosmetic defect.  Design change from original concepts. |

**Sample Issues:**

Following are some sample issues with severity. Severity depends on the impact which can vary from scenario to scenario. These issues are only for reference.

* + 1. P1 (Critical) – Major Data Loss

**Site Collection/Site/List Missing:** In this, the site collection or sub site or a list is not found, and browser throws 404 error.

**Permission Missing for All users:** In this, no permission is migrated from source to target. All users cannot access the target site even though proper mapping was provided.

* + 1. P2 (Major) – Minor Data Loss

**Single or Multiple Items missing:** A list/library will have some items/documents are missing.

**Site Pages are missing:** If there are pages apart from home of root site collection missing.

* + 1. P3 (Minor) – Configuration Loss

**List View is not working correctly** If one of the list views is not working correctly, then the site will still go live as there are alternate views or content owners can create new views. For e.g., In view of the site the filter/default sort is not working properly.

**Web Part is non functional or missing:** If one of the out of the box web part is missing or broken, but users can access data using standard list views. For e.g., in List Web Part on source the number of columns is 4 whereas on target there are 3.

* + 1. P4 (Trivial) – Look and feel change

**The sequence of the Navigation:** If the sequence of the navigation items is different from the navigation items at the source.

**Site Logo not visible correctly:** If the site logo is not visible as per the source. Note: If the Logo is not part of the same Site Collection then this is not a bug.

**The sequence of the Web Part:** If the sequence of the web part is different from the navigation at the source.

* + 1. Invalid Bugs - Few examples -

**User Missing on Target:** If a user is missing in Target or is missing in the mapping or does not have an active account during migration - No action can be taken post-migration. The content owner should provide permission manually.

**Documents with No Checked In version missing:** If the document exists on the source without any checked in version, such documents will not be migrated, at least one checked in version is required for migration.

**Custom Components are missing:** Any component like site template, custom web parts, designer modification will not be available on the target. Any issues related will these will not be validated.

**Branding:** If the site is themed or have modified master page these will not be migrated and cannot be considered as a bug.

**Navigation\Links:** If there are links across site collections then these links will not work anymore as the target URL may have changed. These must be updated by Content Owners manually.

**Groups:** If there are groups which are not being used, do not have any permission will not get migrated.

**Versions are missing**: If versions are missing for few documents, then this is not a bug. As remediation of versioning is not in scope.

**Workflow not migrated**: Any workflows which are broken or has missing elements (such as task, definition, publishing) in source environment will not be migrated. Any workflows which are not supported by Migration tool will not be migrated.

**Absolute URLs:** Any functionality broken due to a link which does not refer to the current site and in turn does not resolve properly is out of scope.

* 1. Tools

Migration Management App (MMS) will be used for Issue tracking and email communication for each wave.

The Migration Management App is a SharePoint hosted app. Its purpose is to provide a central hub for migrations. The app maintains the migration status of each site collection. It tracks issues related to a migration. It also can generate individual emails to the site owners for each site collection depending on the migration phase that they are into.

Migration Management App can be accessed by using the URL below:

<https://mfc-6fefc538490be7.sharepoint.com/sites/MigrationDefectTracking/ManuLifeMigrationManager>

For out-of-band wave or any custom velocity wave, the communication to Manulife SPOC will be manual. For defect tracking, there will be separate list outside MMS app.

* 1. UAT GO – No GO

After the UAT and SOR are closed, a decision needs to be made which site collections are approved and ready for incremental and Go-Live.

* If both velocity wave and Out-of-band (OOB) waves are in sync –
  + A final meeting will be held on Friday of SOR week of the wave migration to take this decision.
* If both velocity wave and Out-of-band (OOB) waves are NOT in sync –
  + For velocity wave, a meeting will be held on Friday SOR week of the Wave Migration to take this decision.
  + For OOB wave, a meeting will be held on Friday of UAT week of the Wave Migration to take this decision.

All site collections NOT having any P1 or P2 issue open, post triage, will be automatically approved for Go-Live.

1. Communication

Communication is a crucial factor in Migration. Keeping the end users updated and informing them what to expect post migration is particularly important.

Manulife needs to establish a communication plan for key migration dates, notifications, activities, and actions required by the various content owners.

Recommendations for the communication plan include:

* + Prepare email communications, such as notifications, readiness, queries for outdated/unused content, post-migration validation activities, etc.
  + Compile lists of affected content owners, such as site owners, alert owners, etc.
  + Prepare a schedule for sending email communications.

Target site collection URLs should not be shared with any users before UAT Day 1. Content owners can access the site collection during UAT.

* 1. Email Communication

**For velocity wave -**

Automated email notifications from the Migration Management Site will be sent at four different points during the team site migration process.

1. Pre-migration communication (Migration started behind the scenes)
2. Site content validation communication #1 (Site collection ready for UAT)
3. Site content validation communication #2 (Site collection ready for SOR)
4. Site migration complete communication (Site collection successfully migrated).

Migration Management App will be used to send emails to Content and Technical owners. Manulife will manage end user communication.

**For Out-of-band wave -**

For out-of-band wave or any custom velocity wave, the communication to Manulife Single Point of Contact (SPOC) will be manual.

1. Sample Migration

Sample Migration was carried out for 12 site collections comprising of 100Gb content. Post completion of the migration, a Sample Wave Migration Reports was shared. Similar reports will be shared with Manulife for every wave before UAT. Please find the report in the Appendix section.

Following sheet contains lists of site collections migrated as part of sample migration.



* 1. Findings

Following reports have been shared with Manulife for review as sample migration findings.

1. **Content Migration Report**
2. **Navigation Mismatch Report**
3. **Site Mismatch Report**
4. **InfoPath Report**
5. **Source Never Checked-In Files**
6. **Workflows**
7. **Permission Report**
8. **Web Part Mismatch Report**
9. **Content Types Reports**

**Custom/Deprecated Site Templates:**

* Custom/Deprecated site template not available
* Mapped to Team Site

**Structure Modification**

* It was found that some sub-sites have been deleted from sites after content DB backup.
* Such changes may cause issues in reporting and overall migration and remediation. Please refer the To-do list in **SP Migration Settings and Limits** document.

**Custom Content Types:**

* Custom Content Types exists which are not getting migrated using Metalogix. Report for such content types has been shared with customer.

**Workflows:**

* While migrating Metalogix has failed to migrate some workflows Designer Workflow.
* Any Workflow failure will have to remediated manually by Manulife.

​

​

1. Migration Limitations

The target environment is SharePoint Online, all features or functionalities which are not supported or configured on target will not be migrated. As there are unsupported scenarios, there may be some loss of data when the content is migrated. Please refer the SP Migration Settings and Limits document for all the limitations. Refer section **11.1 SP Migration Settings and Limits** for the document.

1. Appendix
   1. SP Migration Settings and Limits



* 1. Manulife Wave Activity Plan



* 1. MMS and Issue Triage Process



* 1. Sample Migration Reports

Please refer ReadMe section in each report for details.

1. **Content Migration Report**

****

**Navigation Mismatch Report**



1. **Site Mismatch Report**

****

1. **InfoPath Report**

****

1. **Source Never Checked-In Files**

****

1. **Workflows**

****

1. **Permission Report**



1. **Web Part Mismatch Report**

****

1. **Content Types Reports**

