

Modernize your SharePoint

How to move from classic publishing & team sites to modern sites?

Katja Jokisalo | #SPSNL 29.6.2019

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Who am I?

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Modernize your SharePoint

- how to move from classic
publishing & team sites to
modern sites?

Is your organization still using classic SharePoint sites? In this session you'll learn how to modernize your existing sites as smoothly as possible.

We'll start with a quick glance at differences between classic and modern infrastructure and features. We'll find out what's the difference and how to deal with it in six main areas: structure, pages and web parts, branding, customization, lists and libraries and group connection.

Then we'll walk through best practices for actually planning and implementing your modern, Office 365 connected sites. You'll learn how to take advantage of PnP modernization tools: SharePoint Modernization scanner to prepare your sites for being modernized and Page Transformation Engine, which converts existing classic pages to modern ones. We'll discuss differences between cross-site and in-place modernization, and you will also learn how to use PowerShell scripts to groupify, teamify and hubify your old sites.

Session structure



WHAT'S THE
DIFFERENCE?



HOW TO DEAL
WITH IT?



LET'S GO
MODERN!

What's the difference?



WHAT'S THE
DIFFERENCE?



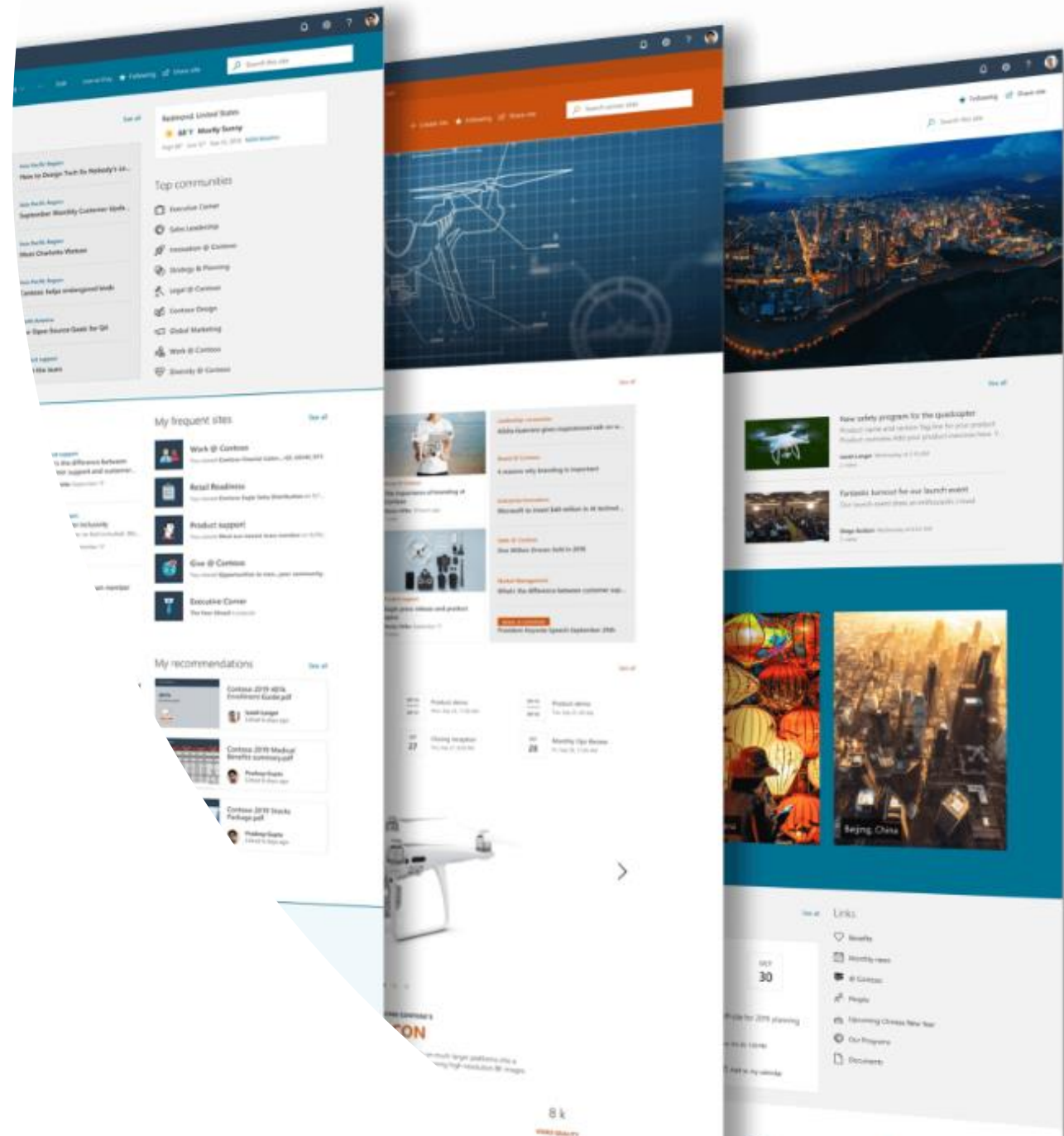
HOW TO DEAL
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LET'S GO
MODERN!

Modern SharePoint

- New UI & lots of new features in lists and libraries
- Two new site templates (living side-by-side with the old ones) – team site & communication site
- Flat and flexible structure
 - No subsites but hubs!
- Completely renewed pages
 - Natively responsive and mobile friendly
 - Bunch of awesome new web parts
- Available in cloud and SharePoint Server 2019
 - Feature set in on-premises based on Jan 2018 level



What's the difference?

Modern vs classic



Structure

No subsites - hierarchy and connections made with hubs & navigation



Pages and web parts

New page type, new web parts – old ones do not work on modern pages



Branding

No masterpage or CSS but modern themes + placeholders for extensions



Customizations

Completely renewed model for customizations (... yeah, again :)



Lists and libraries

Modern UI and features already widely in use, some blockers still exist



Group connection

Team workspace is nowadays much more than just a site

How to deal with it?



WHAT'S THE
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HOW TO DEAL
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LET'S GO
MODERN!



Structure

No subsites - hierarchy and connections made with hubs & navigation

-
- Old way
 - Navigation hierarchy and inheritance made by subsites
 - New way
 - Every site is a site collection, joined via hubs
 - How to do it
 - Please - don't use subsites!
 - Create new site collections for old subsites and move / rebuild content there
 - Create hierarchy and connections with hubs & navigation
 - Hub to connect multiple sites to same context (Intranet Hub, Projects Hub, Archive Hub etc)
 - Navigation to create hierarchy on site pages (traveling > travel expenses > daily allowances)



Pages and web parts

New page type, new web parts – old ones do not work on modern pages

-
- Old way
 - Fixed page layout and page content area (publishing pages) and classic web parts
 - New way
 - Modern site pages instead of old wiki-, web part- or publishing pages
 - New authoring canvas, no fixed page layouts
 - All content is created with new modern web parts
 - How to do it
 - You need to change page type AND content (web parts)
 - Old content modules (web parts) do not work on modern pages
 - Rebuild or use Page Transformation tool to create modern versions of existing pages
 - Configure layout and web part mapping



Branding

No masterpage or CSS but modern themes + placeholders for extensions

-
- Old way
 - Old themes or custom masterpage and CSS + JavaScript injections to modify DOM
 - New way
 - OOB responsive! Modern themes and SPFx application extensions
 - How to do it
 - Replace old themes with modern ones
 - Old themes still kind of work, but... It's better to switch to modern themes
 - Revert back to default masterpage & CSS
 - Replace UI customizations
 - With OOB features if possible (footer, megamenu etc)
 - Rewrite with new SharePoint Framework (SPFx) Extensions model (restricted areas and means to modify DOM)



Customizations

Completely renewed model for customizations (... yeah, again :)

-
- Old way
 - Lots of injected / embedded JavaScript, add-ins and even full trust code
 - New way
 - SharePoint Framework apps and extensions
 - Add-in model (app parts) still work on modern
 - How to do it
 - Evaluate new modern OOB features and web parts and use them when possible
 - Check out PnP collection as well!
 - Rewrite customizations
 - JSLink / Custom list menu items → SPFx Field Customizer extension / Custom Formatting
 - Custom Action / Script Link → SPFx Application Extension
 - Script Editor web part → SPFx web parts (Community Modern Script Editor)



Lists and libraries

Modern UI and features already widely in use, some blockers still exist

-
- Old way
 - Classic UI and features in lists and libraries
 - New way
 - Modern UI (copy, move, Flow, PowerApps, filter, in-place views etc)
 - How to do it
 - Most of the lists and libraries appear already in modern UI, no action needed
 - Some list types are not yet supported – use modern replacements if possible
 - Tasks → Planner, Posts (blog) → News, Discussion → Teams / Comments, Survey → Forms etc..
 - Get rid of features that are not supported or might prevent using modern UI
 - Column types; publishing (html), geo location
 - Customizations; JSLink, custom ribbon actions
 - Views; webparts in view pages
 - Features; metadata navigation, document sets (rolling out!)



Group connection

Team workspace is nowadays much more than just a site

-
- Old way
 - Just a SharePoint site and all contents and functionality there (tasks, calendar, discussions...)
 - New way
 - SP team site is part of team workspace – dedicated apps for tasks, mailbox, chat etc via O365 Group
 - How to do it
 - Prepare your Team Site – use Scanner
 - Get rid of team SUBsites
 - Check out and solve warnings (publishing feature active, AD groups, custom masterpage etc)
 - Groupify and Teamify (and Hubify, if needed)
 - Take care of adoption of the new features!

Let's go modern!



WHAT'S THE
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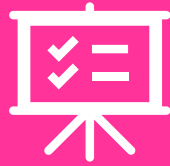


HOW TO DEAL
WITH IT?



LET'S GO
MODERN!

Let's go modern!



How to move from classic to modern

Plan and prepare
Make it flat
Modernize
(Groupify and Teamify)



Tools supporting that move

Modernization
Scanner
Page
Transformation
PowerShell
scripts

Cross-site vs in-place modernization?



Cross-site

Needed, if

- You have subsites
- You are moving to cloud
- You need to modernize publishing sites (other than root)

Pros:

- Modern site template
- “clean start”



In-place modernization

Possible, if

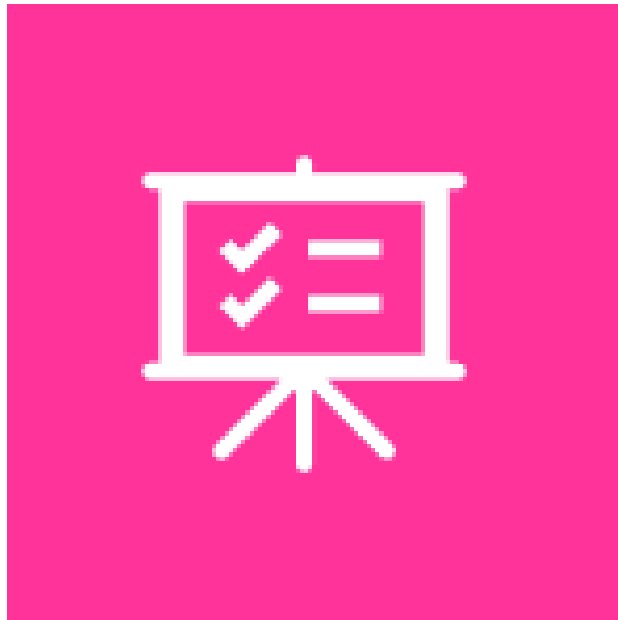
- You have site collections (no subsites)
- You are already in cloud
- You are modernizing team sites

Pros:

- URLs don't change
- No 3rd party tools needed



How to: In-place modernization



- Prerequisite:
 - Classic SPO team site collection (in the cloud, no publishing features, no subsites)
- Step 1: Scan & prepare
- Step 2: Transform pages
- Step 3: Modernize
 - Lists and libraries
 - Customizations and theme
- Step 4: Groupify & Teamify
 - Move docs under /General or other suitable channel folders

Groupify and Teamify

- This step is all about SharePoint Team Site becoming Teams team
- Groupify: Connect existing Team Site to a new Office 365 Group
 - Get group calendar, mailbox, planner etc
 - Be aware of changes in site permissions!
- Teamify: Connect existing O365 Group to Teams
 - Get Teams workspace (group chat and much more)
- Tools: Scanner + scripts to bulk-connect

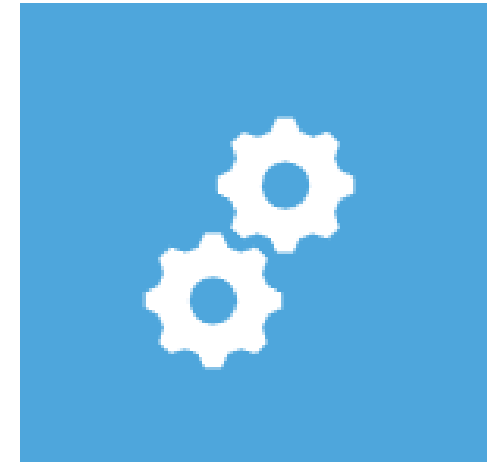


How does groupifying affect permissions?

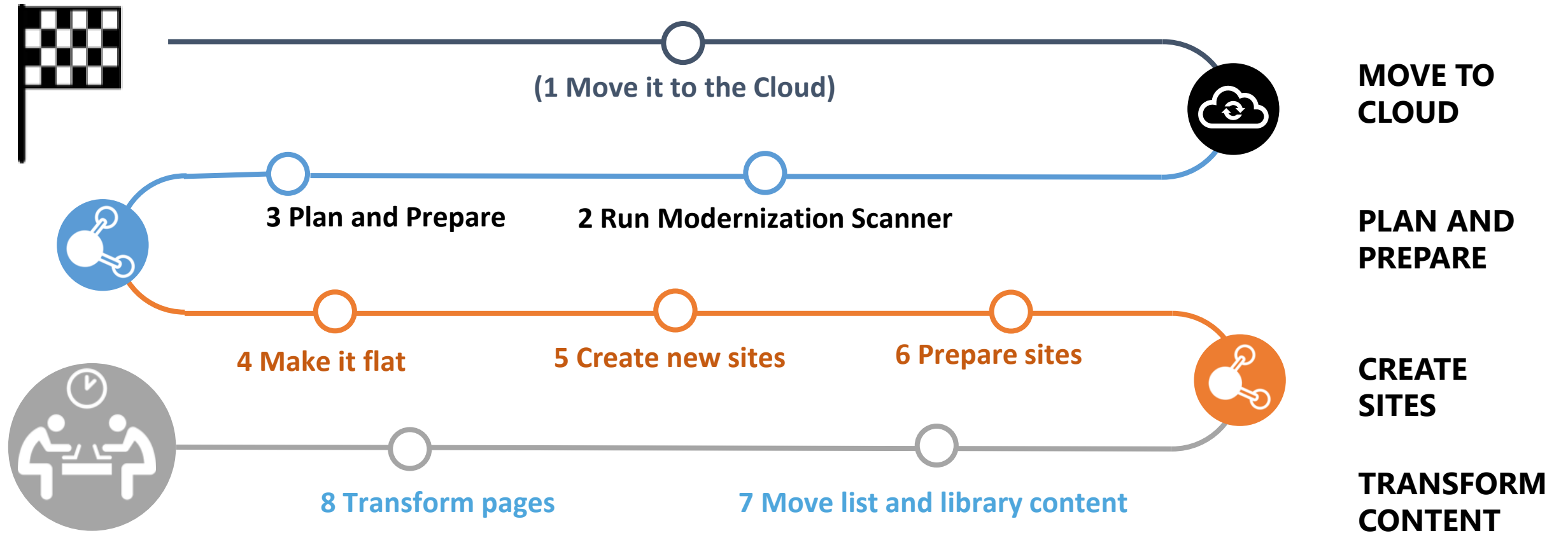
Site collection administrators	Site Owners	Site Members	Site Visitors	Custom permissions
<ul style="list-style-type: none">• Current sitecol admins will be added to group as Owners• Individual sitecol admin rights will be removed• Group owners (group) will become sitecol admin	<ul style="list-style-type: none">• Current ones will stay in SP site owners group• Current ones will be added to group as Members• Group owners (group) will be added to SP site owners group	<ul style="list-style-type: none">• Current ones will stay in SP site members group• Current ones will be added to group as Members• Group members (group) will be added to SP site members group	<ul style="list-style-type: none">• Private group: Current ones will stay in SP site visitors group with no access to group• Public group: Current ones will be added to group as Members (with Edit permission to site content)	<ul style="list-style-type: none">• Current ones will stay as-is• No access to group

Groupify and Teamify scripts

- PowerShell scripts to Groupify
 - <https://docs.microsoft.com/en-us/sharepoint/dev/transform/modernize-connect-to-office365-group>
 - <https://github.com/SharePoint/sp-dev-modernization/tree/master/Tools/SharePoint.Modernization/Scripts/Groupify>
- ...Teamify...
 - <https://docs.microsoft.com/en-us/powershell/module/teams/new-team> (use param -Group)
- and Hubify
 - <https://docs.microsoft.com/en-us/sharepoint/dev/features/hub-site/create-hub-site-with-powershell>



The Great Cross-Site Modernization Journey



(Move it to the Cloud)

- Have to keep it on-prem?
 - SP2019 supports modern sites BUT
 - Feature set in on-premises based on Jan 2018 level
 - No hubs, no group connection, no Teams
 - No PnP tooling for preparing and page transformation available
- Lift and shift “as-is”?
 - You can then take advantage of Scanner and other cloud-based tooling
 - Easiest way: 3rd party migration tools, for example Sharegate
 - Same tool can be used in moving list and library content later on
- Move just contents later on?
 - You can also move list contents and transform pages directly to their target destination
 - Free SharePoint migration tool can be used



Plan and prepare

- Decide your scope
 - Which sites should be modernized - Is it active? Is it important?
 - You can also mix classic and modern sites
 - typical Intranet scenario: modern frontpage and news, classic content sites
- Run Modernization Scanner!
 - Find out how complex your environment is
 - Check best practices
- Evaluate custom code and configurations
 - Is there OOB option which could be used?
 - Do you need to rewrite some code?



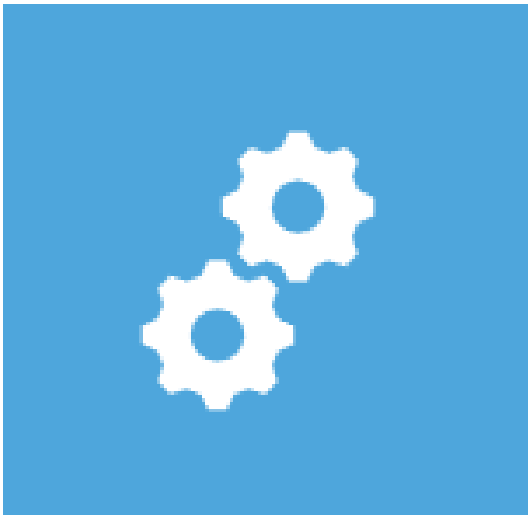
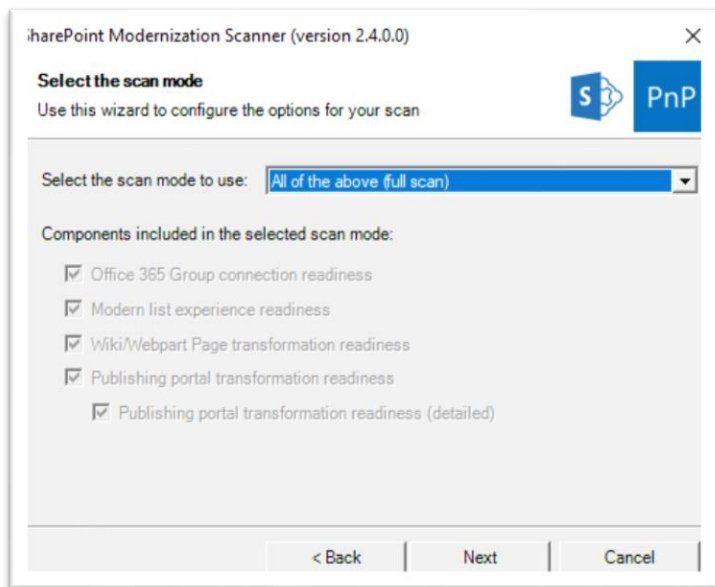
Modernization Scanner

- Free tool by Microsoft
- First version 1/2018, getting updates frequently
- **Cloud only!** Cannot scan on-prem!
- Download and run from your machine
- Gives great insight about classic features in use

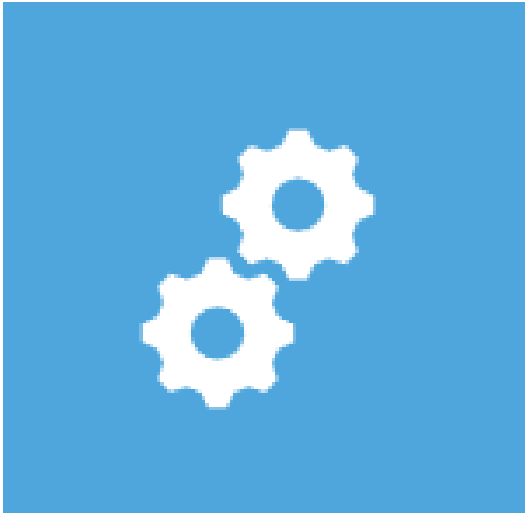


Modernization Scanner - options

- Run with app-only principal
 - admin accounts don't usually have direct access to all sites
- Scan whole tenant or specific site collections
- Modes:
 - Full
 - Group connection
 - Lists
 - Pages (transformation)
 - Publishing portal



- errors
- ModernizationListScanResults
- ModernizationPublishingPageScanResults
- ModernizationPublishingSiteScanResults
- ModernizationPublishingWebScanResults
- ModernizationSiteScanResults
- ModernizationUserCustomActionScanResults
- ModernizationWebScanResults
- Office 365 Group Connection Readiness
- Office 365 List Readiness
- Office 365 Page Transformation Readiness
- Office 365 Publishing Portal Transformation ...
- PageScanResults
- ScannerSummary
- SitesWithCustomizations
- UniqueWebParts



Modernization Scanner - results

- Excels = dashboards, analyse and review
 - Group Connection Readiness
 - List Readiness
 - Page Transformation Readiness
 - Publishing Portal
- CSV's = data

DEMO

Modernization Scanner



Create and prepare sites

- Plan your new modern architecture – make it flat
 - NO SUBSITES!
 - How many hubs and for what purpose?
 - Which subsite level will be “lifted” to site collection level?
- Create new sites
 - PS script or manually
 - Team sites: decide whether to create Teams or Teamify later
 - Note: with new URL renaming you can later swap the site url's
- Prepare sites
 - Promote hub site(s) and join other sites to hub, implement hub navigation
 - Set up site permissions and settings (use Site Designs for that)
 - Create and apply new modern theme, deploy SPFx extensions



Move content

- Move list and library content
 - 3rd party tool, manual (sync / file explorer), PS scripts or SP Migration Tool (from on-prem)
 - Subsite contents should be moved to new top-level modern site collection
 - If you have a deep hierarchy, you're most likely moving lists from different subsites to the same top-level site – some mapping and renaming is probably needed
 - Note: take care of Teams channel <> folder connection
- Transform pages
 - Rebuild pages manually OR use Page Transformation Tool
 - Create local navigation in sync with page creation (pages should be added to navigation)
- Check contents and switch to modern features

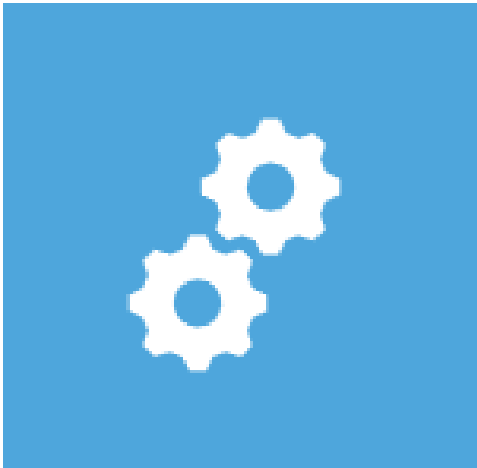


Page Transformation Engine

- Free tool / code base available in PnP github
- Allows you to transform existing classic page to a new modern site page
 - Note: publishing pages came in April, still in preview
 - Note2: transforming from on-premises came in June
- Creates a copy of the page with modernized content
- Transformation can be controlled with XML configuration file



```
# Create a modern version of this page
Write-Host `Modernizing $page.FieldValues
$modernPage = ConvertTo-PnPClientSidePage
Write-Host "Done" -ForegroundColor Green
```



Page Transformation Engine - options


- 3 ways to use;
 - UI – let users do it page by page
 - PowerShell – transform multiple pages with script and config xml
 - .Net – create your own transformation tool with full control
- Publishing page transformation with PowerShell
 - You need Page Layout mapping file for your custom page layouts – there's default one for OOB page layouts
 - Mapping file can be created with *Export-PnPClientSidePageMapping* cmdlet
 - Edit the XML file to fit your needs
 - Run transformation with *ConvertTo-PnPClientSidePage* cmdlet
- Check out the list of mapped web parts
 - <https://docs.microsoft.com/en-us/sharepoint/dev/transform/modernize-userinterface-site-pages-webparts>
 - Note! No cross-site support for custom, content query or content search webparts

DEMO

Page Transformation



Recap!

- No need to modernize everything – focus on active & important
- If you can, move to cloud “as is” and then take advantage of the PnP tooling
- Use Modernization Scanner to find out where to focus
- Make it flat! Hub before you sub!
- Cross-site modernization = create new sites, move content
- Evaluate existing customizations and try to find OOB replacement
- Transform your existing pages
- Enjoy Modern 

Wanna know more?

Microsoft docs

- <http://aka.ms/sppnp-modernize>
 - <https://docs.microsoft.com/en-us/sharepoint/publishing/sites-classic-to-modern-experience>
 - <https://docs.microsoft.com/en-us/sharepoint/dev/transform/modernize-publishing-portal>

Tools

- <https://github.com/SharePoint/sp-dev-modernization>
- <https://github.com/SharePoint/sp-dev-fx-webparts/tree/master/samples>

Scripts mentioned

- Create sites <https://docs.microsoft.com/en-us/powershell/module/sharepoint-pnp/new-pnpsite>
- Set up sites with site design <https://laurakokkarinen.com/the-ultimate-guide-to-sharepoint-site-designs-and-site-scripts/>
- Example: transform classic blog posts to modern news pages
<https://github.com/ollij/Demos/blob/master/TechDays%20Finland%202019/Copy-BlogsToNews.ps1>

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