

Welcome Everyone!

Thank you for joining us!

Best Practices for Making your Migration to SharePoint Online a Success!



PLEASE
Be Sure To
Silence Your
Cell Phone



- Principal Consultant @ Netwoven
- 28+ years of overall development experience including 16 years as a Microsoft Software Design Engineer and Technology Solutions Professional.
- MCTS MCP
- Cloud Solutions (Office365, Nintex Workflow, DocuSign...) development, deployment, and migrations.



Who is Netwoven? 2015 Cloud Computing Excellence Award Winner



- Netwoven is a solution consulting firm serving large & mid-size enterprises
- We were founded in 2001 by former Microsoft executives
- Top domain experts from multiple industries and technology firms like Microsoft, Accenture, Oracle & Intel
- U.S. headquartered company with global development center



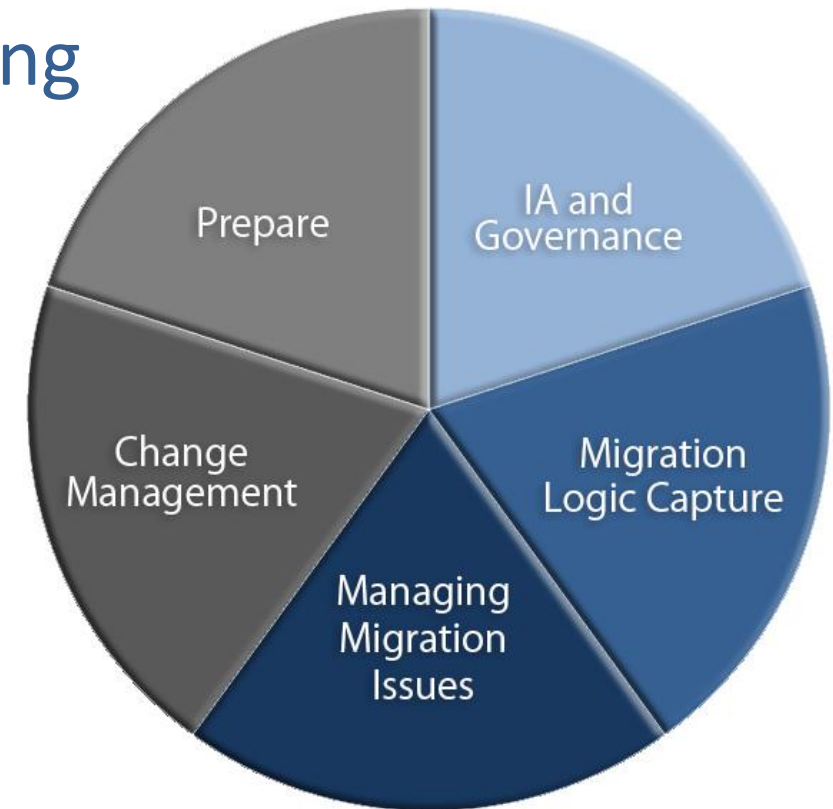
Netwoven Services

- **New Deployments / Migrations to Office365**
- **Dynamics CRM solutions**
- **Social and Search based solutions**
- **Expert Staffing Assistance**
- **Nintex Authorize Reseller**
- **Enterprise Content Management**
- **Web, Intranet & Collaboration Sites**
- **Big Data Management & Visualization**
- **Integrated Digital Marketing**
- **Platform Managed Services**

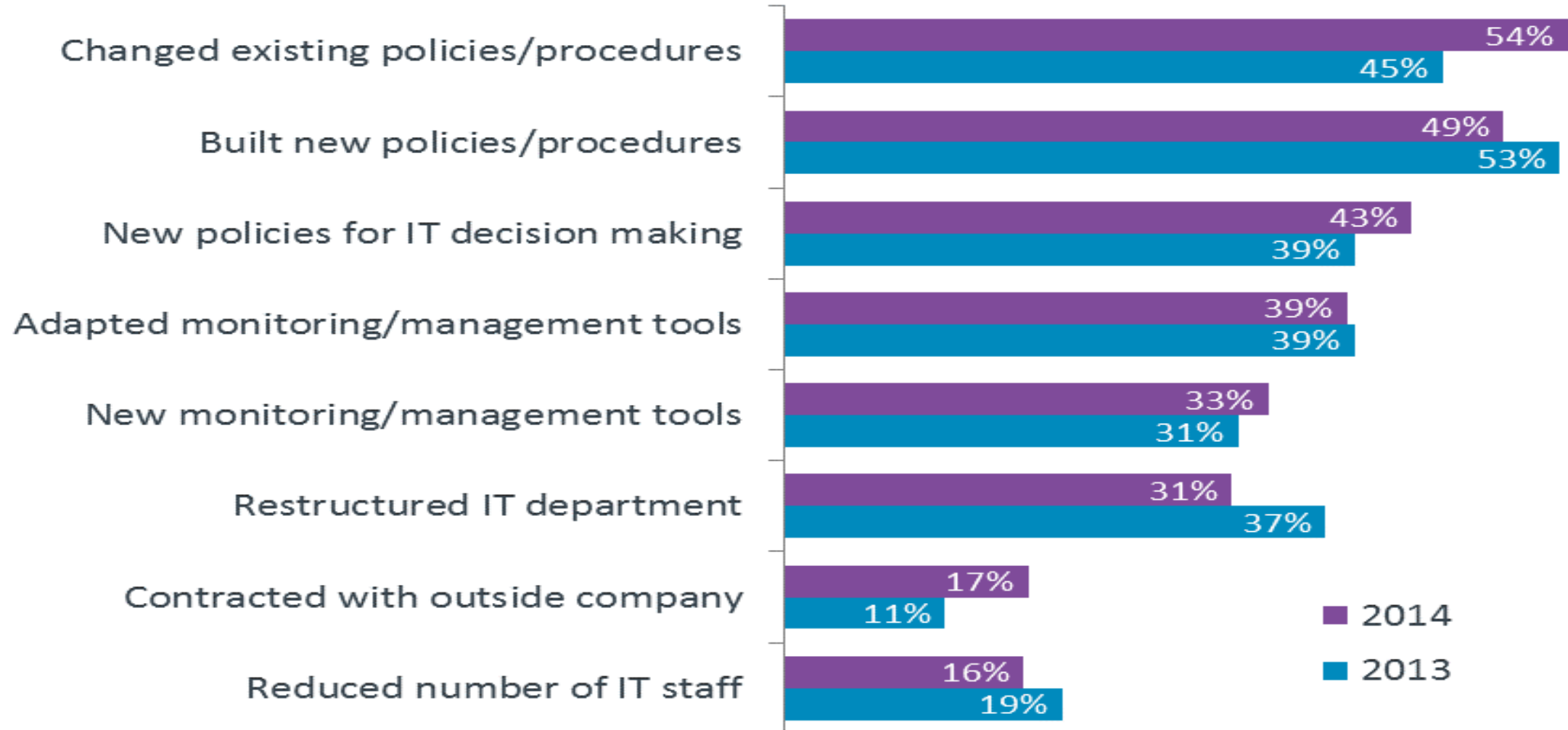


Topics for Today....

- Defining the vision and scope
- Information Architecture and Planning
- Pre-Migration Analysis
- Migration Setup
- Iterative Migration Process
- Post Migration wrap-up
- Governance

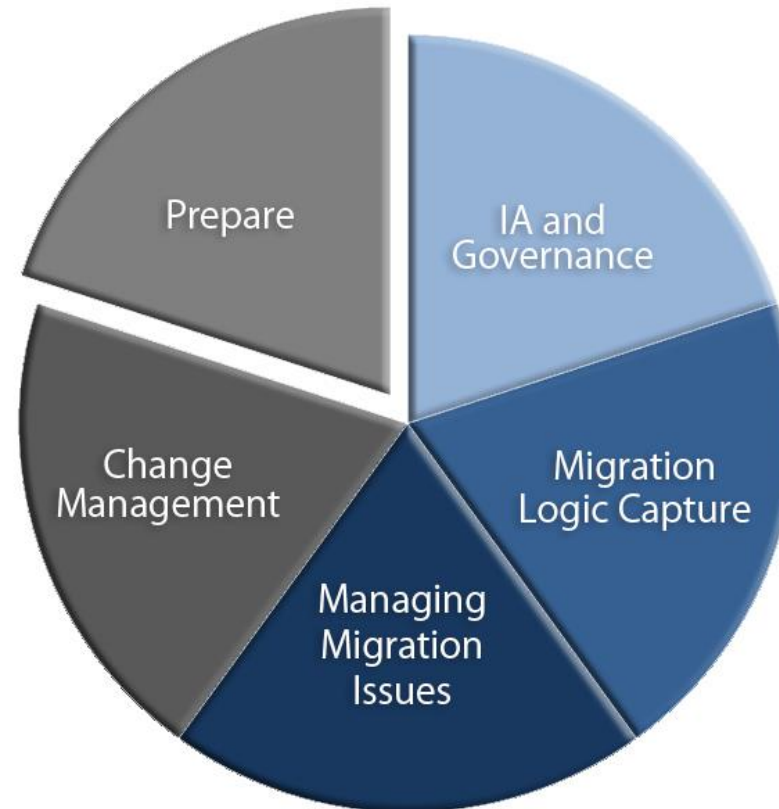


Internal Changes Driven by Cloud



“65% of the large organizations believe that SharePoint will be one of their top five mission critical business applications in 2 years time.”

Enterprise Strategy Group

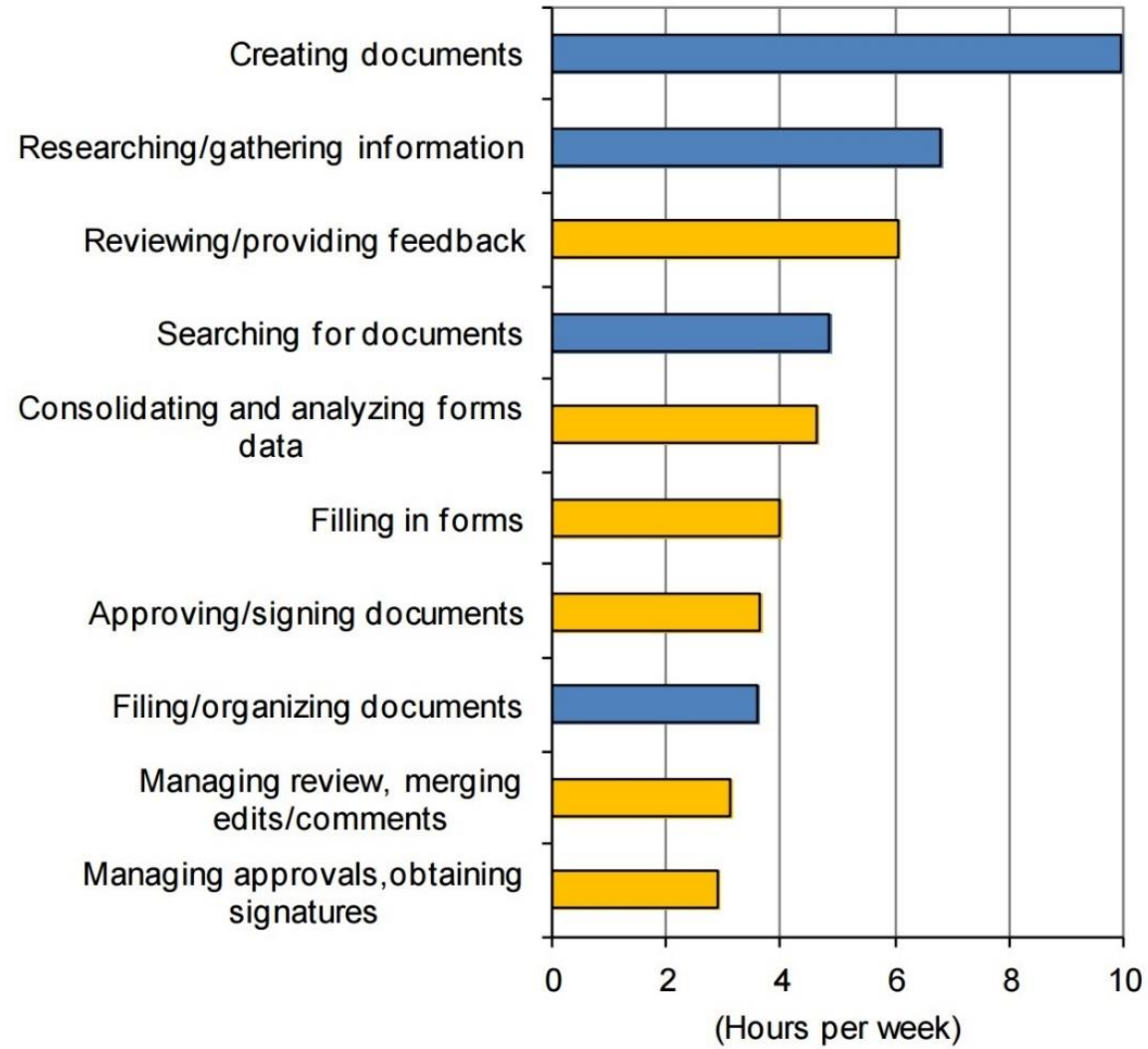


**ARE YOU PROPERLY PREPARED FOR YOUR
MIGRATION TO  SharePoint Online ?**

Assemble a Working Group



Educating the Group



■ Activities related to creating/managing documents (personal productivity)

■ Activities related to review/approval of documents (collaboration)

Run a Workshop to answer the following questions:

- Collaboration Strategy and Common Issues?
- What is SharePoint/O365?
- What is Information Architecture?
- How do Permissions, Inheritance and Groups work?
- What types of Site Templates and what does my Organization need in them?
- What can and should we do with Creative Design and Branding?
- What is Governance and why should I care?

- Reports
 - Content, Versions and Distribution
 - Permissions and Inheritance
 - Migration Known Issues (File Size, Unsupported File Types, etc.)
 - Identify where extra attention is needed: Workflows, Custom Features, InfoPath Forms, etc.
- User, Group and Template Mapping
- Purchase a Migration Tool!
- Baseline your Migration Throughput and Tune
- POC your Migration and identify Post Migration Configurations required
- Dial in the configuration options available with the Migration Tool

- Disposition or skip migrating unnecessary content
- Clean Up Permissions or don't migrate them

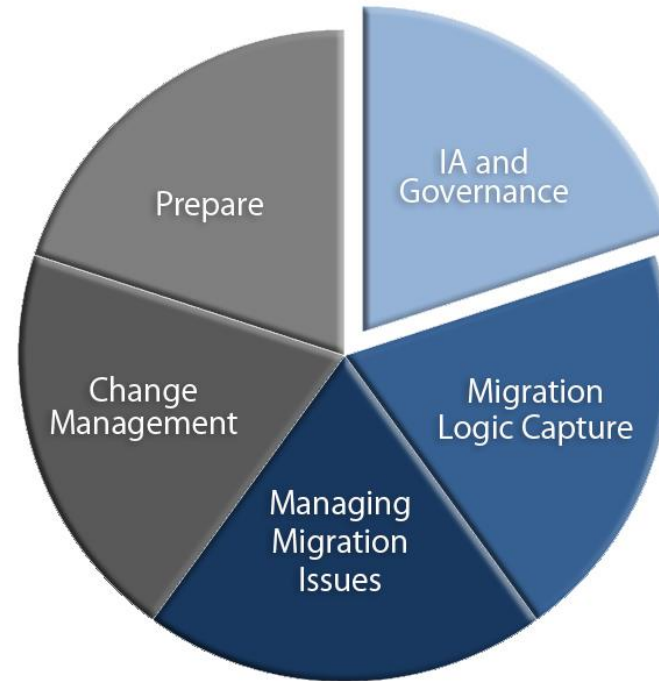
Embrace the opportunity that has presented itself and don't forklift extra baggage into your shiny new 3CS Platform

3CS

- Content
- Collaboration
- Communication
- Social

Metalogix Demo...





INFORMATION ARCHITECTURE

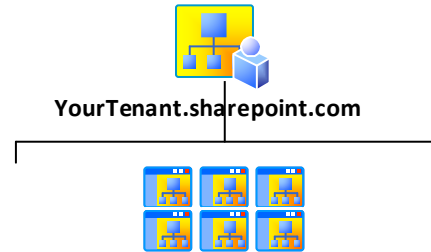
Why Would I Design When I Can Just Build?

- Information Architecture and Design is not intended to be done by the masses
- Make it easy to determine where to put content as well as how to find it
- One design doesn't fit all, however a common, extensible foundation works as a starting point for nearly everyone
- What content management, content storage systems, or technologies currently exist within the organization?
- Does your organization have a complex or even massive file-share environment in place?
- Is there an existing intranet with documents or static content that will need to be analyzed and considered? If so, who owns or updates this content?
- What does your organization consider to be a record?

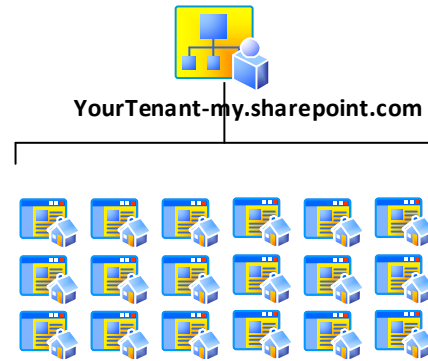
Site Collections and Site Architecture

YourTenant.sharepoint.com

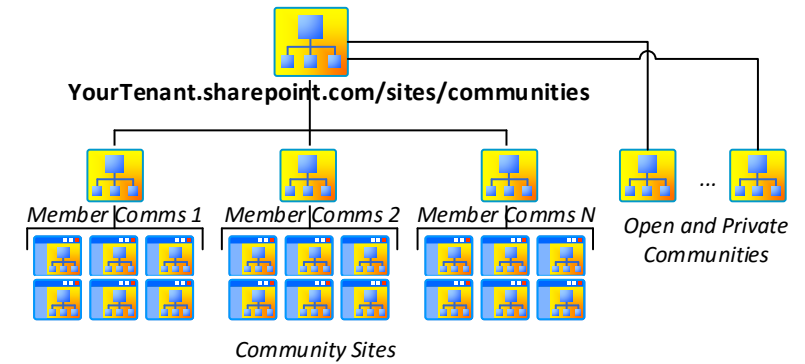
Intranet Home



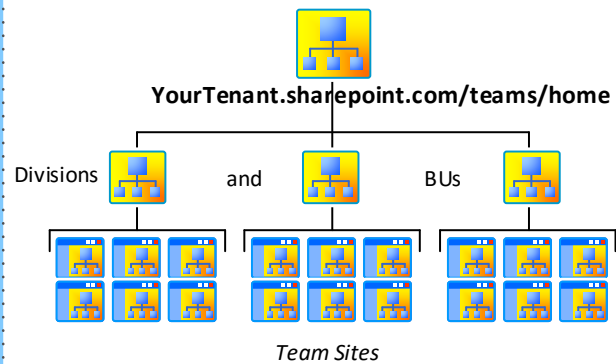
My Sites and OneDrive for Business



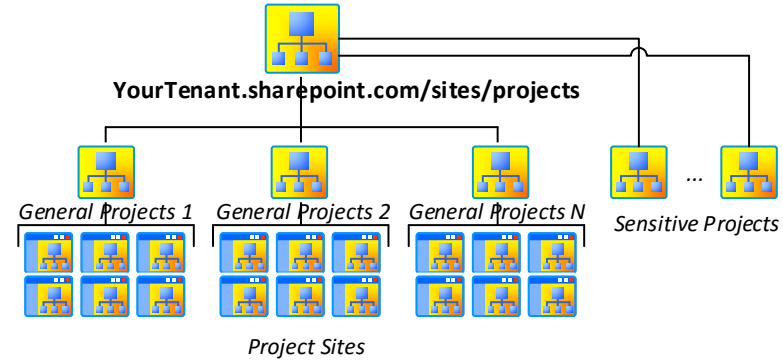
Communities



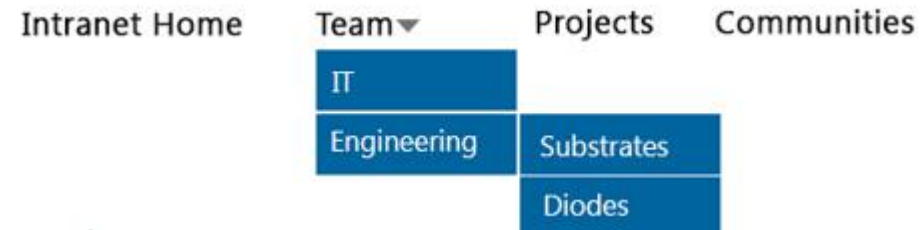
Teams



Projects / Inter-Team Collaboration



Top Level Global Navigation



Structural Team Site Collection Global Navigation



- Consider whether you have any organization-wide tagging requirements first
- Move into more specific cases as you define your templates
- Don't worry if this is not part of your initial rollout... Many times it comes later with structured Document Management or ECM for your Intranet Portal

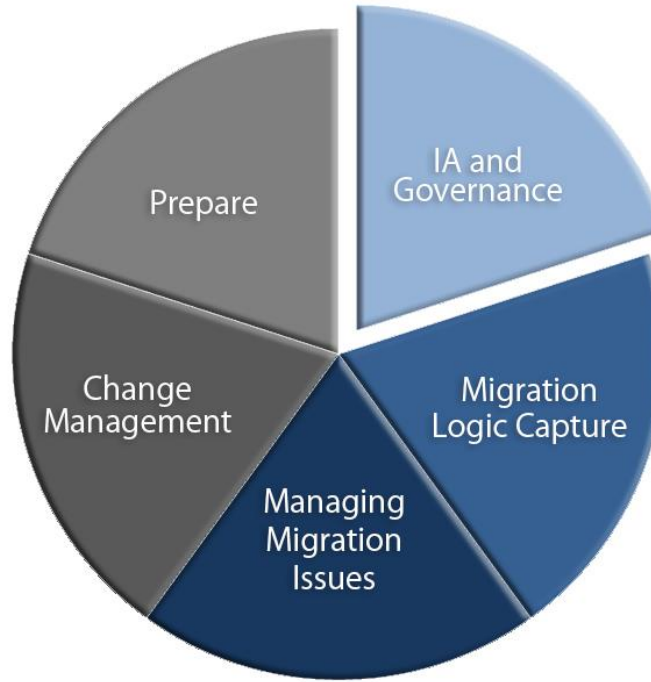
Examples

Security Classification

Expiration Date

Project Phase Gate

Business Requirements
Document



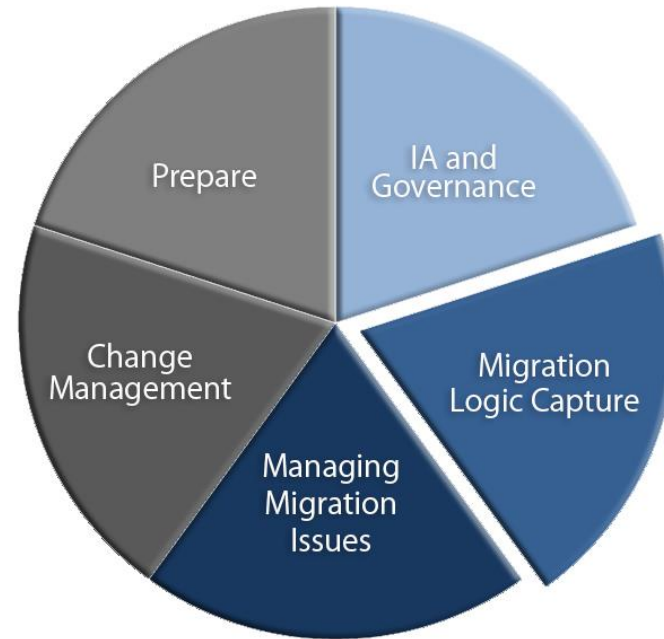
SITE PROVISIONING, BRANDING, TEMPLATES AND GOVERNANCE

- Build a Custom Site Provisioning Application
 - Leverage the “Provisioning Sites and Site Collections” Project - <http://dev.office.com/>
- Automate the governance rules for Site Creation to reduce ongoing overhead and remove potential for mistakes
- Consider the ability to introduce a Workflow into your Site Provisioning Process
- Stick to the OOTB Master Pages and use JS Injection

- If you decide against taking the Custom Site Provisioning App approach, at the very least:
 - Keep living sites that you create your Web Templates from in a central location
 - Strictly enforce the policy for managing, updating and deploying your Web Templates across your content site collections
 - Employ JS in your Master Pages to enforce where your site owners can create sites of each template type
- Consult with an expert to avoid the many pitfalls with using Web Templates... There are a lot of them!

- Centralize your branding components for ease of management (CSS, JS, Images and other Assets, etc.)
- Strongly advocate keeping it simple and leveraging the Theming Framework for Collaboration Branding
- Be cognizant that you don't break Minimal Download Strategy (MDS) with your branding and JS

**Whether by Automation
or Manual Process,
Make sure you clearly define &
enforce your Governance
Policies!**

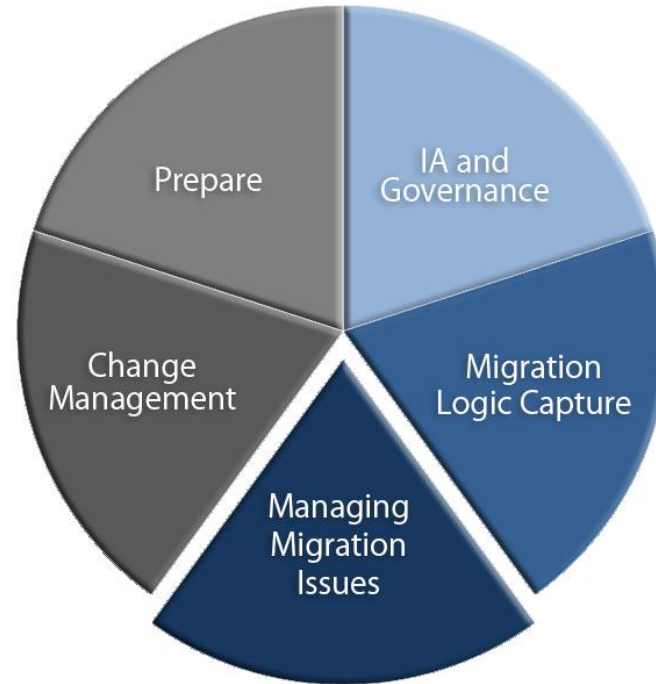


MIGRATION LOGIC CAPTURE AND ANALYSIS

Why Should I Organize the Mapping Logic Capture?

- Why can't I just let my site owners do this on their own accord?
- Team sites... representatives from each to reflect the desired organization hierarchy into the site structure
- Central validation from someone that "Get's it"
- Save money on Migration Tooling Licenses
- Automate the migration and testing from the structured logic captured





PROACTIVELY TACKLING MIGRATION ERRORS AND OMISSIONS

Proactive Migration Error Handling

- Migration tools don't always capture all of their own errors and omissions when run at a large scale
- Don't put yourself in an endless support situation, automate the testing of the migrated content



- Provision Testing Servers to run your Automated Tests
- Test: Lists, Libraries, Configurations, Views, Versions, Authorship Data, Navigation, Web Parts



BROKEN LINKS

Fixing Links versus URL Redirection

Fixing Links

- Permanently Fixes the Problem
- Requires Specialized Tooling
- Can be time consuming and expensive to implement
- Need to ensure it covers all file types you need
- Can be difficult to manage updating absolute hyperlinks on Wiki and other Page Content during migration

URL Redirection

- Requires ongoing support of another solution
- Overhead of ongoing management is fairly low
- Cost to implement is comparatively low
- Supports redirecting of all links in all types of content



ESTIMATING AND MANAGING YOUR MIGRATION TIMELINE

Focus

- Minimize your Blackout Window
- Catch as many issues as possible with automation
- Continually reinforce your unified communications

Process

1. Pre-Migration Analysis
2. Migration Logic Capture
3. Full Migration, Automated Testing and QA/UAT
4. Delta / Incremental Migration, Automated Testing and QA/UAT
5. URL Redirection and Go-Live

Estimating and Managing your Timeline

- This project likely affects the whole organization... Getting the timeline right is very important
- Size of Content required to be moved after cleanup / Avg. Throughput Rate = Time for Full Migration
- Break the Migration into Logical Steps or Chunks
- Plan on overlapping QA/UAT for one Step with Migration of the next



MANAGING THE CHANGE

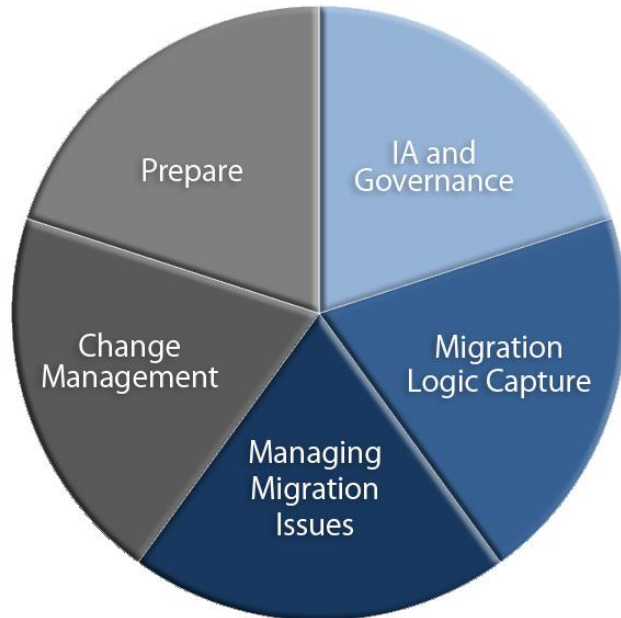
Communications Plan

- Unified Communications
- Regular Email Messaging from Communications
- Insert prominent Announcements and Notifications in system to be retired
- Create a Site with all project publicly shared information (Timeline, Status, Open Issues, Updates, etc.)
- Create a Help Center / Community where people can ask questions and find answers
- Collaboration Strategy

- Questions your users need to know the answer to:
 - What is our Organization's Collaboration Strategy?
 - Where can I look for Help and How to Content?
 - Who can I talk to if I need help with how to best leverage SharePoint?
 - Are there new features of SharePoint that I should consider leveraging to enable better collaboration with my colleagues?
- Allow your team to leverage the platform to its fullest!

Call to Action

Jump start your Migration strategy with our expert advice!



- **Information Architecture Workshop**
- **Migration Strategy Review**
- **Migration POC**

Expert Advice



Strategy



Review



Migrate



Thank you for your time and participation!

Questions: AlexV@Netwoven.com

Connect with us!



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