



WHAT YOU NEED TO KNOW BEFORE MOVING TO A NEW SHAREPOINT VERSION

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When it comes to migrating to the newest version of SharePoint, if you are failing to prepare you are preparing to fail. In a recent webcast, Vlad Catrinescu, Microsoft SharePoint MVP, offered insight into what you need to do to be prepared.

“If you don’t prepare, and if you don’t know what you’re trying to migrate and where you’re going to move, it will not be an easy migration,” he told his audience of IT professionals.

Before beginning the nuts-and-bolts work of the actual migration, the IT professional needs to assess the source environment for potential issues, Catrinescu explained. He noted that over the years SharePoint has become especially popular because it allowed organizations to customize it and to essentially make it their SharePoint. But moving from SharePoint 2016 or earlier versions to the latest version of SharePoint requires looking at all those customizations as well as third-party applications that were integrated with the earlier version.



Outlining what IT needs to review, Catrinescu said: “We have libraries, we have lists, we have pages with our content, we have metadata that is assigned to pages, lists, items and documents. And we have workflows; and what would SharePoint be without a few custom solutions?”

You need to think about how to incorporate what you had in SharePoint in the past with what you are going to have after the migration. Most importantly, you have to realize that modern SharePoint is fundamentally different than previous versions.

PREPARING FOR MIGRATION: ONLINE OR ON PREMISES OR HYBRID?

One of the most fundamental decisions that organizations need to make is whether to stay fully on premises by migrating to SharePoint 2019, move to Office 365 if you want to go into the cloud with SharePoint Online, or enable a hybrid mix between the two. Whichever option is chosen, you need to first analyze the kinds of content you have before migrating.

“What do we have in SharePoint on-premises?” Catrinescu rhetorically asked.

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LIBRARIES

“Let’s look at libraries,” Catrinescu began. “You have document libraries, asset libraries, video libraries, and image or picture libraries; so multiple types of libraries depending on the use and the presentation of that library. Most of your content will probably be Office documents. If you are on SharePoint and the Microsoft stack, then that is the most popular document that we use for collaboration. There are also PDFs and other documents, and depending on if you’re an engineering company, you might also have AutoCAD files that are linked to things. If you are in the medical field, you might have x-rays and advanced images out there. What do we have that people really look for when migrating?”

VERSIONING

Automatic versioning has been part of SharePoint since 2013 and continues on in SharePoint Online. This may create many duplicates of what is essentially the same document. In planning for the next migration, Catrinescu advises, IT pros need to determine if all those versions, which may amount to large amounts of data, need to be moved. In some cases, there may be regulatory or legal reasons for keeping all of the versions of a document. For example, if there is a filing for a patent, you may need to keep every

version of every document related to that. However, marketing plans and related documents that tend to change annually, quarterly or even more frequently may not require keeping every version of older and often outdated files. The issue here is that if you include every version of every file, you may have a huge amount of data to move to the cloud, and that will mean the migration will take significantly more time.

LISTS

Lists in SharePoint present another problem because if they are not managed correctly, they can cause performance issues on premises and are now subject to restrictions in the Microsoft cloud. Understanding the lists you are dealing with in migration is a major task.

“We have all sorts of lists,” Catrinescu explains, “custom lists, contact lists, tech lists and even more customized ones that are done by a SharePoint Designer, by other tools, or even by code. And we have multiple types of columns. A lot of you who have done migrations in the past will probably remember a few nightmares from lookup columns. You need to know what your people are using because if I have a list that has managed metadata with terms toward my central taxonomy, I need to migrate that taxonomy because if I don’t, then that list will be

invalid and won't work anymore. The same thing goes for a lookup column if I have a lookup column for another list to get information. If I don't migrate that other list, all of the data will be invalid because it breaks the lookup."

To ensure that end users have what they need, you have to carefully manage the size of lists and understand why there are limitations to the size of lists. This is not some arbitrary rule, Catrinescu explains, it all has to do with user access to the data they need.

"A lot of you might remember the five thousand item limit in SharePoint," he noted. "It wasn't really an item limit. If we think of SharePoint on premises, it was more of a performance recommendation. The five thousand item limit was introduced because it doesn't cause a lockup of the database when you try to get all of the five thousand items. It was more of SQL limitation, not a SharePoint one."

With SharePoint on premises, it is possible to increase the limit from, for example, five thousand to two hundred thousand.

"Unfortunately," Catrinescu notes, "I've seen lists with over a hundred and forty thousand items. That is something to analyze and know where those are. Because while on premises it's easy to change that limitation, in SharePoint Online you cannot change it. They recently added some more smart filters and automatic column indexing to make it easier to manage large lists, but that's only up to twenty thousand. More than that, you might encounter weird errors and people might have problems

accessing those files, so you're better off to break them down."

CUSTOMIZATIONS

All of the customization you have done with past versions of SharePoint need to be looked at carefully because they are not going to easily migrate to the latest version of SharePoint.

"SharePoint is a web-based system," Catrinescu explains, "so whatever you consume is on a SharePoint page. If you have content directly on this page or Web parts that can be an image Web part, a custom Web part or a Web part displaying documents or list items from one of your lists, you need to look at how those customizations will migrate. A lot of SharePoint environments have also been branded, so that needs to be looked at too."

The look and feel, the rules that have been applied, and even the basic layout of columns in your current SharePoint pages can prove problematic.

"You need to know which pages have been customized and how they have been customized," Catrinescu cautions. "In SharePoint Online, for example, if you had a master page on-prem, you cannot or at least should not migrate that to SharePoint Online, especially if you are going to the modern architecture. Your current page layouts will not work anymore so you can't just migrate them as is."

It is important to analyze all these things because if you try to shoehorn your old SharePoint with its branding and other customizations, end users will find that things they relied on don't work after

IF YOU ARE MOVING TO EITHER OFFICE 365 OR SHAREPOINT 2019, YOU MAY NEED TO RECODE THOSE ADVANCED WORKFLOWS.

the migration. You are likely to get Help tickets that say SharePoint is broken.

METADATA

SharePoint metadata is often found in multiple places. You have your farm-level taxonomy, which is managed by your taxonomy person if you are a big company or by your SharePoint admin if you are a smaller company. That covers all of the taxonomy that is accessible on all of the farm level. You also have metadata for columns at the site collection level as well as at the list level. It's important to document all of the places where you have managed metadata terms because you will need to migrate those terms, and if possible keep the same IDs when you migrate it to SharePoint Online so you don't have any broken links between content and the taxonomy.

WORKFLOWS

"SharePoint has been really big on business process automation," notes Catrinescu. "We're able to create workflows in a ton of ways. So, we have SharePoint 2010 and 2013 type workflows that can either be created by the UI or we have custom workflows."

The workflows created by individual power users are not an issue. What IT needs to look at are advanced workflows calling APIs and calling web services

done by a developer. If you are moving to either Office 365 or SharePoint 2019, you may need to recode those advanced workflows.

CUSTOM CODE

"The reason SharePoint got so popular was because every company was able to take SharePoint and make it their own," Catrinescu says. Code created using one of the newest development methods, apps, add-ins and sandbox solutions all need to be looked at.

Remember that even though add-ins are one of the newest features with SharePoint 2013, it still is not the most recent one," the Microsoft MVP explains, "because SharePoint now has SharePoint Framework. So, there is always a framework coming out and it's always important to know if you might not only need to migrate the code, but to also recode it so you can get the latest benefits with modern SharePoint.

MICROSOFT SHAREPOINT MIGRATION TOOL

Looking at all the complexity involved in migrating to modern SharePoint, IT professionals may want to look at tools that could help automate or at least ease the process. Microsoft does offer the SharePoint Migration Tool, which the company says: "... lets you migrate lists or

files from your SharePoint on-premises document libraries or from your on-premises file shares and easily move them to either SharePoint or OneDrive in Office 365.” The tool is available for Office 365 users.

However, Catrinescu cautions that the tool is limited in what it can do. The Microsoft MVP suggests IT pros look at Quest Metalogix as an alternative.

QUEST METALOGIX CONTENT MATRIX

Quest Metalogix solutions help you accelerate and streamline content migration, management and security for Microsoft SharePoint, OneDrive for Business, Office 365, Exchange and other cloud collaboration services. Designed with industry best practices, Quest Metalogix enables you to execute today’s most complex and strategic collaboration priorities—whether your platform is on-premises, in the cloud or in a hybrid environment. You can also move deprecated and custom line-of-business applications into the platform of your choice; manage storage, archiving and system performance; and protect and govern your entire collaboration ecosystem.

Quest Metalogix’s award-winning cloud, hybrid and on-premises solutions provide you with the freedom and control to migrate, manage and secure

content within enterprise collaboration platforms. Over 20,000 organizations trust Quest Metalogix to optimize the availability, performance and security of their content across the collaboration lifecycle.

Quest’s Metalogix Content Matrix provides capabilities for migrating directly to SharePoint, OneDrive for Business or Office 365 and manage sites, content and metadata on an on-going basis. See for yourself how to:

- Migrate to SharePoint, OneDrive for Business and Office 365 in one hop—with zero downtime.
- Connect and move terabytes of content from file shares, websites, blogs, wikis, Exchange Public Folders, PST files and eRoom content.
- Analyze, identify and fix potential migration roadblocks and prepare your environment for a successful migration.
- Enable end-users to define and control their migration by using a pre-defined migration configuration.
- Add, organize and edit metadata based on content location and other properties.

For more information:

www.quest.com/SharePoint/Migration

