



## PSC GROUP, LLC

OFFICE 365/SHAREPOINT ONLINE MIGRATION  
TRAPS AND TRICKS



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# How SharePoint Online/Office 365 is different from traditional SharePoint implementations



## No Central Admin

- No access to items such as web apps, alternate access mappings, search configurations, etc.
- Legacy full trust farm solutions have to be redone or replaced.



# How SharePoint Online/Office 365 is different from traditional SharePoint implementations



## No Server access to either SharePoint or SQL Servers

- All resources are part of MS Cloud.
- Content DB attach migration is not an option.



# How SharePoint Online/Office 365 is different from traditional SharePoint implementations



## Office 365 is often referred to as an “Evergreen” environment

- Environment is not static. Updates are constantly being added to the Office 365 apps.
- Change management strategy is vitally important when deploying Office 365.



## Identity Management

- **Cloud Identity** -- Each user has a separate username and password for O365 other than their AD account.
- **Synchronized Identity**– AD directory and password synchronization with O365 portal. Users have to login to the portal but with same username and password. Requires Azure AD Connect.
- **Federated Identity**– Single Sign On. Requires ADFS Server, Web Application Proxy greater management.
- <https://support.office.com/en-us/article/Understanding-Office-365-identity-and-Azure-Active-Directory-06a189e7-5ec6-4af2-94bf-a22ea225a7a9>

## License Planning

- **What licenses and resources do we need for our users?**
- <https://products.office.com/en-us/compare-all-microsoft-office-products?tab=2>

## Domain Planning

- **Adding your Domain to Office 365 Tenant**
- <https://support.office.com/en-us/article/Add-users-and-domain-with-the-setup-wizard-6383f56d-3d09-4dcb-9b41-b5f5a5efd611>

## How many Global Administrators and who are they?

- Global Administrator controls all aspects of the Office 365 tenant.

## Do we want other role based administrators?

- SharePoint Administrator, Billing Administrator, Exchange Administrator, etc...

## How are we going to assign user licenses?

- Individually through the UI or via bulk options with PowerShell scripts, etc...
- <https://technet.microsoft.com/en-us/library/dn771770.aspx>

## Release Preferences

- Standard Release vs First Release
- <https://support.office.com/en-us/article/Set-up-the-Standard-or-First-Release-options-in-Office-365-3B3ADFA4-1777-4FF0-B606-FB8732101F47>

## Identify Requirements for Content Migration

- Keep date stamps, created by, modified by, version history?
- Workflows to migrate? Migration tools can migrate the SPD workflows but “in flight” status doesn’t migrate.
- Migrating entire sites or the lists and libraries from the site?
- Legacy sites or list or library components that have issues?
- Metadata columns and/or site content types to migrate?
- Term Sets?
- Custom solutions (i.e. Sandbox solutions)?
- Custom Branding ?
- Checked Out Documents? We will need to check them in to account for the latest published versions.

## Key Elements

- **Complete a worksheet of key decisions on SP Online config**  
I.E Branding, Site Navigation, Security Planning, etc...
- **Evaluate, identify and test 3<sup>rd</sup> party migration tool to assist with content migration**  
Some good choices include ShareGate, Metalogix Content Matrix, and others.
- **Enlist and setup a select group of users for a pilot group**  
Enable a small group of qualified users who can do initial production pilot testing to identify issues and clean up items prior to enterprise migration.
- **Plan your work and work your plan**  
A comprehensive migration plan is a must. Items to include would be migration and rollout schedules, post migration support for new users, roll back options in the event of problems, etc...
- **Communication plan for our end users**  
Tell them what to expect and when to expect it, what do they need to do to prepare for migration (i.e. check in old documents), how to request support on first days on new portal, etc...



# Migration “Traps” Items that can impact our migration



## Custom Script Setting

- Default is restricted. This impacts legacy workflows, other legacy SharePoint features and may impact performance of migration tools.
- <https://support.office.com/en-us/article/Turn-scripting-capabilities-on-or-off>

## SharePoint Lists and Libraries Experience

- Default is “New Experience”. It is very different than what our users have been used to with SharePoint lists and libraries. We should provide orientation and support if we want to deploy.
- <http://sharepointpals.com/post/New-SharePoint-Online-New-Look-and-Feel-experience-Part-1>

## Office Software Install

- Do we want to have our users have the option to “Install Office 2016” on their own?
- <https://practical365.com/clients/office-365-proplus/configure-software-download-settings-end-user-byod/>

**Thank you for attending!**

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