

TOP 10 UNEXPECTED CHALLENGES IN A SHAREPOINT MIGRATION

Avoid the key gotchas that could delay or even derail your migration project.

Quest®





Unexpected challenges can rear their ugly heads during each stage of a SharePoint migration. Don't let them derail your project.

Introduction

A SharePoint migration is a complex undertaking with many moving parts. The best way to maximize your chances of success is to prepare carefully and follow proven best practices through all the phases of the migration process:

- Discovery
- Planning
- Migration
- Launch

However, even the most thorough and careful migration plan can be delayed or even derailed by unexpected challenges. To help you be successful, this ebook details the top gotchas that can arise in each stage of a SharePoint migration and offers practical guidance for handling them effectively — or, even better, avoiding them in the first place. Then it offers two solid tools that help simplify, streamline and secure all your SharePoint migrations: [Metalogix® Content Matrix](#) and [Metalogix® Essentials for Office 365](#) from Quest.

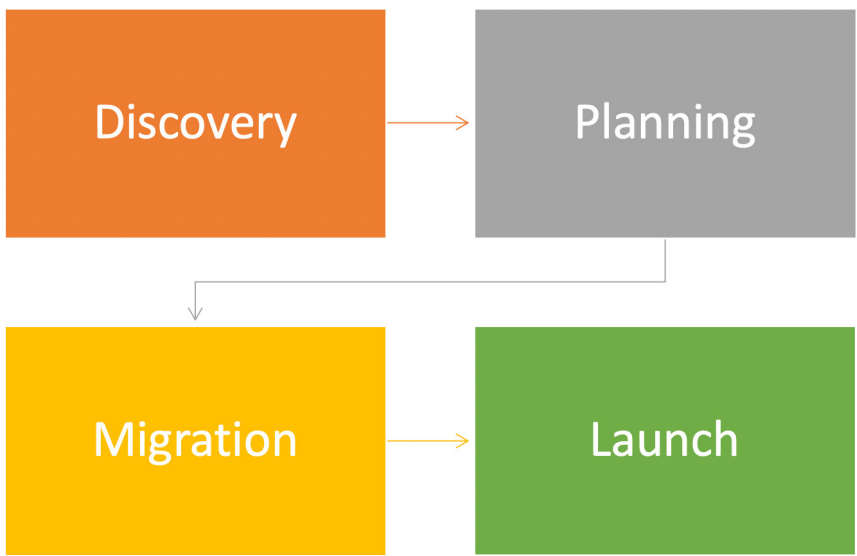


Figure 1. The four phases of a migration

Discovery

The first phase of any migration is discovery. Getting a clear understanding of your source environment is critical to success.

There are two key components to this phase:

- **Technical discovery** — You need to dig deeply into the specifics of the IT environment, detailing all of your sites, site owners, applications, workflows, users, data, web parts, customizations and so on. Technical discovery also includes assessing and documenting how the SharePoint environment affects or interacts with other parts of the IT environment, such as OneDrive and Teams.
- **Business discovery** — It's equally critical to gain a clear understanding of how business processes depend on SharePoint. Which SharePoint workflows are essential, and to whom? Which sites have reached their end of life and are no longer needed? Without a comprehensive business discovery, you cannot properly scope the migration, prioritize various tasks or be confident that the target environment will serve your organization well.

With those two key aspects of discovery in mind, here are the key unexpected challenges to watch out for in this phase of the migration process.

UNDERSTANDING WORKFLOWS AND ACCESS REQUIREMENTS

It's common to think that the goal of a migration is to move a set of objects — users, sites, files — from point A to point B. However, this is actually the means to the goal, and not the goal itself. Your SharePoint is more than a set of things; it's a complex environment for facilitating collaboration and communication. The ultimate goal of a migration, then, is to deliver a target environment that enables users to be productive and happy, and that is also secure and compliant.

The first step in attaining this goal is to get a clear picture of what each user can do in the current SharePoint environment. This analysis involves many dimensions. In particular, be sure to consider all the ways that access to data and applications can be granted, including permissions that are assigned directly as well as those granted via membership in various groups, including SharePoint groups, Active Directory groups and Azure AD groups. Also think about permissions related to shares with external members, whether on-prem with forms-based authentication or domain trusts, or online with accounts from other tenants.

What was the most unexpected challenge you had with your SharePoint migration?

“The other company granting access.”

— IT manager, medium enterprise financial services company (Source: TechValidate, TVID 722-165-DEF)



It's also vital to get a clear inventory of all your current workflows, including legacy SharePoint Designer workflows, InfoPath forms, third-party forms and workflows (such as Nintex), custom .Net applications, and workflows built using Microsoft PowerApps or Power Automate. Custom workflows will almost certainly require special attention during all subsequent phases of the migration, so be thorough in your analysis.

Then you need to work with your business counterparts to determine what each user ought to be able to do in the target environment and the best ways to deliver the workflows they need going forward, taking into account the differences in features and functionality between the source and target environments. That way, you can make changes before or during migration to ensure the target environment is both productive and secure. If a merger or acquisition (M&A) is in play, be sure to carefully lay out the access required by each user in all the organizations involved.

What was the most unexpected challenge you had with your SharePoint migration?

“Our biggest challenge has been prioritizing the project.”

— IT manager, medium enterprise healthcare company (Source: TechValidate, TVID 84A-EB1-C20)

UNCOVERING THE TRUE BUSINESS DRIVERS AND STAKEHOLDERS

It's exceedingly rare for a company to undertake a migration simply to get the new features offered by the target platform. Nevertheless, many migration teams fail to take the time to understand the core business reasons behind the migration. As a result, they cannot identify the content and process owners and other key stakeholders in the migration project, or properly prioritize tasks or make decisions about issues such as risk mitigation.

For example, here are some possible business factors that can have a significant impact on your migration project plan and schedule:

- Is the organization concerned about the costs of maintaining the current hardware? Is reducing your hardware footprint a primary goal of the migration?
- Is there some pressing technical concern that has pushed the migration to the top of the priority list?
- Is the project being driven primarily by external factors, such as a merger or acquisition, an upcoming end-of-life date for a core software solution, or a CTO's desire to impress the Board by deploying new technology?
- Does your team have the necessary skills to accomplish the migration? If not, do you have the budget to outsource the work and the ability to choose a reliable provider?

Planning

The second stage of a migration is planning: determining exactly how to get from your current SharePoint environment to the desired target. Here are the key challenges to prepare for.

SETTING REALISTIC TIMELINES

Many IT projects have deadlines imposed from on high, and SharePoint migrations are no exception. In some cases, there are pressing business concerns, like an impending merger or IPO. Sometimes, there are urgent technical worries, such as imminent hardware failures or storage devices that are bursting at the seams. Sometimes, the reasons seem less defensible — like the earlier example of a CTO trying to impress the Board — but the deadline is no less real.

There are three key strategies for dealing with this common migration challenge:

- **Rigorously define the scope of the migration and hold the line against scope creep** — Clearly define and document your project deliverables up front and get sign-off from all project stakeholders and your executive sponsor. Often, you can dramatically slash migration time and effort by thoroughly cleaning up the source environment. Work with your business counterparts to identify content that's no longer needed or that doesn't really belong in SharePoint in the first place.
- **Clearly define the metrics for migration success** — Be sure you have a clear finish line. Keep in mind that victory does not necessarily have to be 100%; often, you can push back and get agreement that the migration of 85% of end users or 90% of the content databases is sufficient for deeming the initial project a success.

- **Invest in the right tools** — There are software solutions that help streamline and automate all stages of the migration process. Look for a tool that simplifies everything from pre-migration planning to post-migration validation, and that can handle everything you need to migrate, including not just users and sites but metadata, permissions, workflows, term stores and so on. Be sure to choose tools that enable you to run multiple migrations simultaneously and provide visibility into the entire project from a single console. And, of course, be certain the tools are easy to learn and use so you don't have to spend precious time in intensive training sessions or waiting for a vendor specialist to walk you through an urgent task.

38% of surveyed IT organizations reduced SharePoint migration time by 61-80% or more using Quest Software compared to previous solutions.

Source: TechValidate, TVID CA5-666-0CF

CONFIGURING YOUR MIGRATION TOOL AND GRANTING REQUIRED ADMIN PERMISSIONS

Abraham Lincoln once said, “If I only had an hour to chop down a tree, I would spend the first 45 minutes sharpening my axe.” The underlying principle applies to many tasks, from painting a room to fixing a car to preparing your taxes — and definitely to migration. Taking the time to carefully configure your migration tool will save you a great deal of heart-ache and rework. Be sure to pay particular attention to:

- **User mapping** — Specify how users and groups in the source environment are provisioned in the target environment.
- **Versioning** — Control the migration of lists and libraries that have versioning enabled.
- **Azure storage** — Make sure that the Azure storage required by the migration API is in the right location and doesn’t have firewalls or other blocks in place.

Also be sure to grant the administrative rights that will be required to run each part of the migration. If the migration is due to M&A activity, you’ll face the extra challenge of thinking about environments that are not yet fully under your control. But it’s essential to get administrative permissions right; lack of sufficient access is a common cause of failed migration jobs.



One project manager would be very likely to recommend Quest Metalogix migration solutions for this reason:

“The ease with which it can be configured to run the migration, the accuracy of migration, and the very minimum system required to run the tool.”

— Project manager at a medium enterprise energy & utilities company (Source: TechValidate, TVID 1E3-DOC-E22)



PLANNING FOR SHAREPOINT MODERNIZATION

SharePoint Online offers a new modern experience that can transform collaboration and communication for your business users. However, taking advantage of it does complicate the migration process. If you're moving from an on-premises SharePoint, your current information architecture is likely hierarchical: sites have nested subsites that inherit site design, navigation and permissions from their parent sites.

In the modern SharePoint experience, relationships between sites are modeled as links rather than a hierarchy, so you'll need to plan for how you'll flatten your information architecture by promoting your subsites to site collections. Then you'll need to lay out how you'll

associate sites with appropriate hub sites, which are collections of sites that form a useful group (such as a project or geographical location) and share the same look and feel, branding, navigation, metadata, services, and other elements.

In addition to modernizing your information architecture, you'll also want to plan for a productive user experience in the new modern environment, including building effective search and navigation.

To learn more about what's involved, be sure to read the ebook, ["A Beginner's Guide to SharePoint Modernization."](#)

Migration

Thorough discovery and careful planning will help you avoid a multitude of issues during the actual migration process. But there are still some gotchas to know about as you set up and run your migration jobs. Here are the top ones.

MULTIPLE HOPS

The more complex your migration, the longer it will take, the more it will cost, and the more risk you will incur. Therefore, it's best to migrate all of your content to your target SharePoint destination without having to perform incremental upgrades. In particular, if you're migrating Exchange public folders to SharePoint 2019 or SharePoint Online, look for a solution that enables you to avoid having to make two hops: first from Exchange public folders to on-premises SharePoint, and then from SharePoint to SharePoint Online.

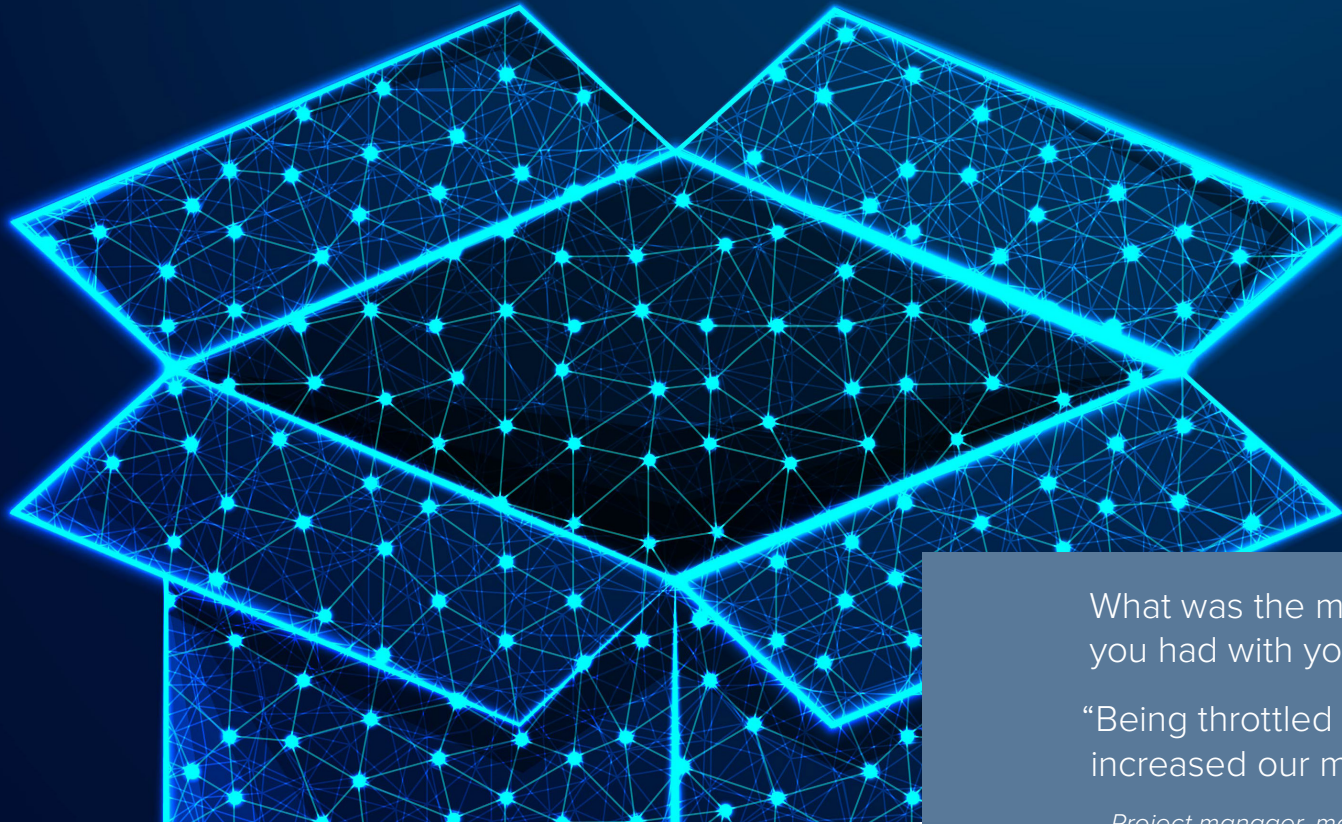
LATENCY

A SharePoint migration usually involves a great deal of data, so latency can be a huge challenge. To mitigate this issue, ensure that you locate your migration machines close to either the source or the target. That way, you minimize the travel time for data and thereby shorten the elapsed time required for each migration job to complete. Remember, even small savings on each migration job can really add up over the course of a full migration. Indeed, it can be a huge factor in whether you meet your timeline.

What was the most unexpected challenge you had with your SharePoint migration?

“Running multiple migrations overnight and making sure they were completed by the morning.”

— IT Architect, Fifth Third Bancorp
(Source: TechValidate, TVID E26-A5C-8DD)



What was the most unexpected challenge you had with your SharePoint migration?

“Being throttled during migration that increased our migration window.”

— Project manager, medium enterprise energy & utilities company (Source: TechValidate, TVID 13D-2A7-309)

THROTTLING

Microsoft is understandably concerned about ensuring strong SharePoint performance for the business-critical applications of all its customers. To keep SharePoint and OneDrive services highly available and reliable, Microsoft puts throttling limits on background processes — including migration jobs — during weekday daytime hours.

To improve migration throughput, you should:

- Use small batches (package at least 250 files per transfer, and keep each package between 100MB and 250MB).

- Choose a tool that uses the migration API.
- Use multiple accounts and machines to run the migration jobs.
- Beef up your on-premises architecture to minimize hardware bottlenecks.

In addition, remember that if you need to migrate over 100TB, you need submit a support request from the Microsoft 365 admin center (from the left navigation pane, select **Support**, and then select **New Service Request**).

Launch

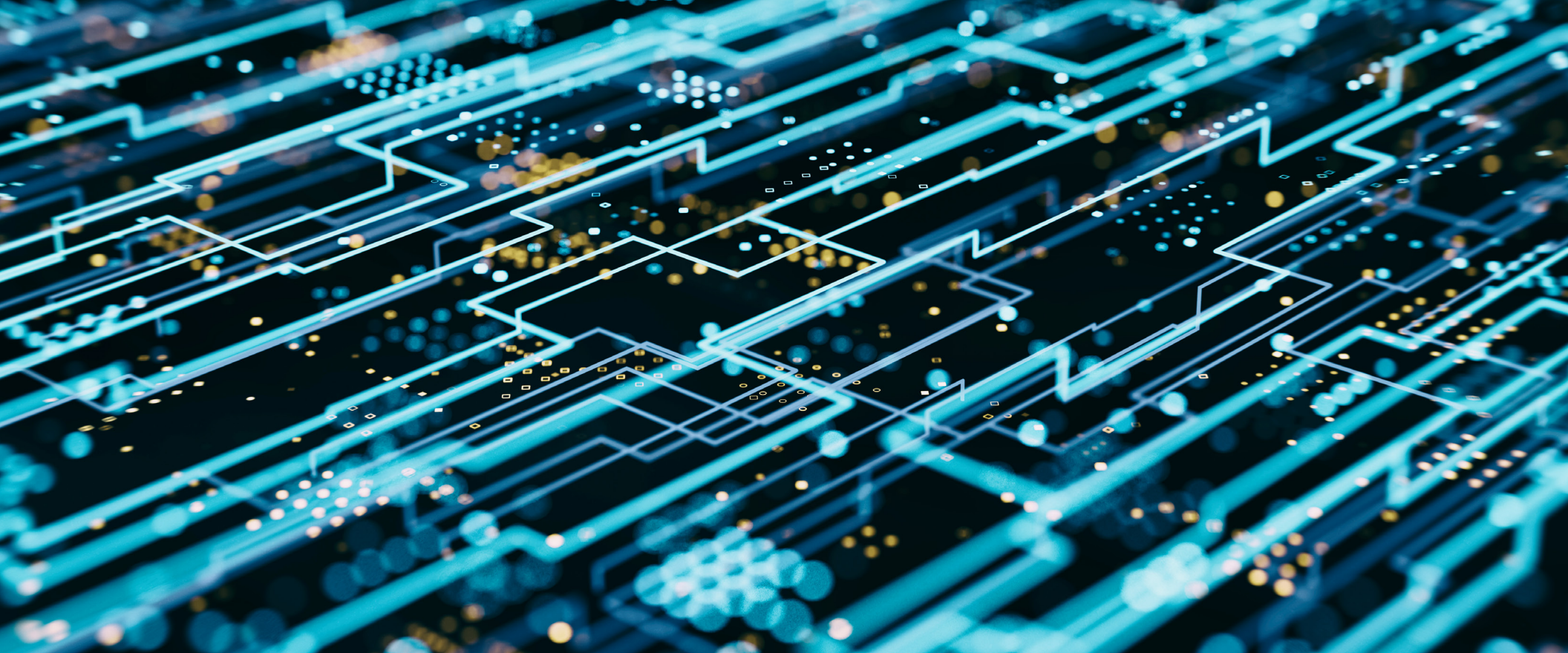
The next phase of the migration — launch — might seem as simple as flipping a switch. But two unexpected challenges can quickly put a damper on your roll-out celebration.

BOTCHING THE CUTOVER

The cutover is the most exciting part of a migration, since it's when users will actually start working in the target platform. But too many organizations assume the cutover is as easy as picking a date and throwing a switch. In reality, a number of factors can complicate the cutover.

In particular, think through how the switch could affect different groups of users and disrupt important workflows — especially if you've moving users to another domain. If you've got multiple geographical locations, you need to look into how your functional groups are laid out and think through the logistics of cutting over sites in different time zones. If you're switching site by site instead of all at once, you need to plan for coexistence to ensure the everyone can still collaborate and communicate when some have been moved to the target platform and others are still in the old SharePoint.

Cutover is never as easy as picking a date and throwing a switch — especially if you're moving users to a new domain or you have multiple locations in different time zones.



INSUFFICIENT COMMUNICATION AND TRAINING

Many organizations fail to build communications into their SharePoint migration plan, and those failures really come home to roost in the launch phase. Remember that effective communication is two-way: You want to learn about the needs and preferences of your users and other stakeholders, and you need to keep them apprised of migration progress and provide the information they need to be successful with the target platform.

There are many options for communication, and adopting multiple tactics is often a good way to maximize your effectiveness and reach. Some of your users will likely prefer interactive conversations like lunch & learn sessions, supplemented by regular email notifications. Others will probably gravitate towards self-paced online training and an online FAQ they can consult on demand. Feel free to get creative! To drive interest and spur adoption, consider holding a contest to name the new SharePoint intranet or provide the best graphic.

Whatever communications channels you pick, be sure to document exactly who is responsible for what, as well as the associated timelines and frequency of updates or training sessions.

How Quest can help

To help you simply and streamline every phase of your SharePoint migration, Quest offers two proven solutions: Metalogix Content Matrix and Metalogix Essentials for Office 365.

METALOGIX CONTENT MATRIX

Metalogix Content Matrix is the industry's most powerful SharePoint and Office 365 migration solution, backed by award-winning technical support. With Content Matrix, you can:

- Accurately move metadata, customizations, workflows, permissions and more, all with zero downtime
- Migrate lists, libraries, files, folders, and Nintex forms and workflows
- Automatically distribute migration jobs across multiple machines so they run simultaneously
- Quickly restructure sites and consolidate content
- Meet tight migration timelines with industry-leading migration speeds
- Migrate directly into SharePoint 2019 or SharePoint Online in one hop

A senior IT architect at a large enterprise insurance company would be very likely to recommend Content Matrix, calling it a “powerful and scalable toolset.”

Source: TechValidate, TVID: 81B-FFD-20F



Figure 2. Content Matrix is the industry's most powerful SharePoint migration solution.

METALOGIX ESSENTIALS FOR OFFICE 365

Metalogix Essentials for Office 365 is a complete solution for migration to SharePoint Online and OneDrive, as well as post-migration management. From a single console, you can:

- Scan and assess your source file shares and clean up permissions and metadata before migration
- Migrate content from on-prem SharePoint and SharePoint Online — as well as OneDrive for Business, Box, Dropbox, Google Drive, shared drives, file shares and public folders
- Clean up and reorganize content, including making changes to data in flight
- Manage permissions and licenses
- Gather key intelligence about SharePoint Online and OneDrive adoption



Figure 3. Metalogix Essentials for Office 365 streamlines migration to SharePoint Online from a wide variety of content sources — and enables efficient management of the target environment.

Conclusion

Don't let unexpected challenges get in the way of delivering a successful SharePoint migration. By following the practical tips provided here and investing in the right migration tools, you can meet your migration timeline and ensure a target SharePoint environment that delights your users.

To learn more about how Quest Metalogix solutions can help you with your next SharePoint migration, please visit <https://www.quest.com/products/metalogix-content-matrix/> and <https://www.quest.com/products/metalogix-essentials-for-office-365/>.

One project manager would be likely to recommend Metalogix Essentials for Office 365 for this reason:

“Best in class for competently managing the transition from old world to cloud.”

— Project manager at a large enterprise financial services company (Source, TechValidate, TVID B9B-37B-836)

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