

The ultimate **SharePoint** migration checklist



We know the drill—balancing a smooth SharePoint migration often on a tight schedule while keeping data safe and maintaining all those crucial permissions is no easy feat. There's so much more to SharePoint migrations than just lift and shift; you need to cover every angle—from planning to optimization to governance and beyond.

Whether you want to migrate to a newer version of SharePoint, to the Microsoft cloud, to another tenant—or just reorganize content, we're with you every step of the way.

Since 2009, we've been helping IT professionals working in Microsoft accelerate migrations.

This checklist will guide you through the phases of your migration journey. Follow these steps to save time and minimize risk.

Contents

Plan ahead	3	Prepare your users	7
Choose your migration strategy	3	Migrate	7
Prepare your migration	4	Post-migration	7
Step-by-step	5	Modernize	8
SharePoint migration		Ensure smooth collaboration and	9
Take inventory	5	communication	
Clean up	6	Manage and secure	9
Get ready	6		

Plan ahead

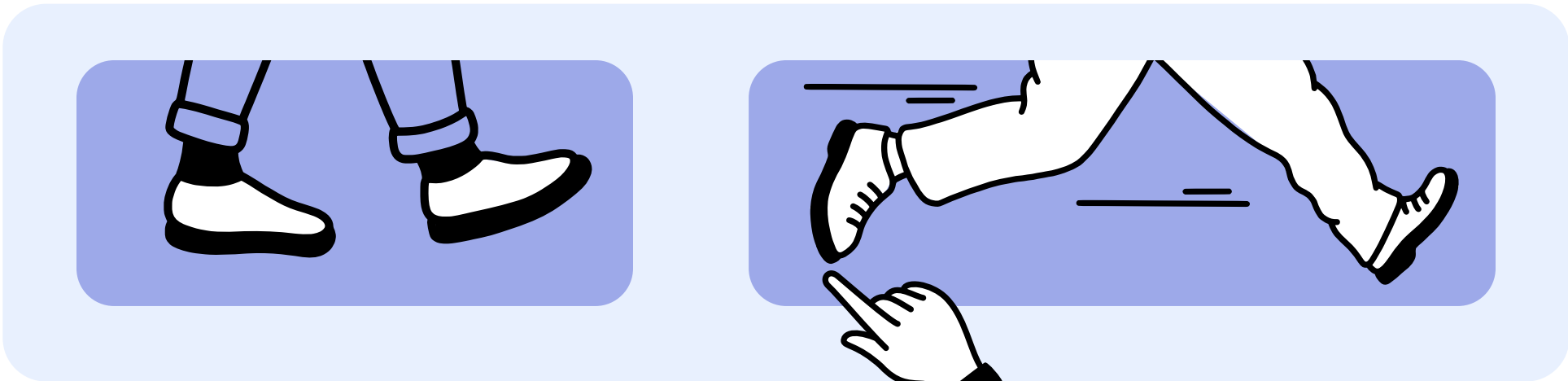
The real work of a successful SharePoint migration is in the planning you do. Regardless of the size and scope of your migration, a solid plan will help you avoid potential errors and ensure that the entire process runs smoothly.



“Not having to go back and fix things manually and rebuild content saves us 15% of project time and helps make our larger projects possible. We couldn’t imagine doing this without ShareGate.”

Doug Punchak, Application Development Manager, Avvenire Solutions

Here are some things to consider before you begin your migration →



Choose your migration strategy

There are a few ways to migrate:

- 1 Several small steps:** A phased approach to SharePoint migration allows you to move small sections of your environment at a time. During this type of migration, users can work continuously and keep productivity going.

DID YOU KNOW?

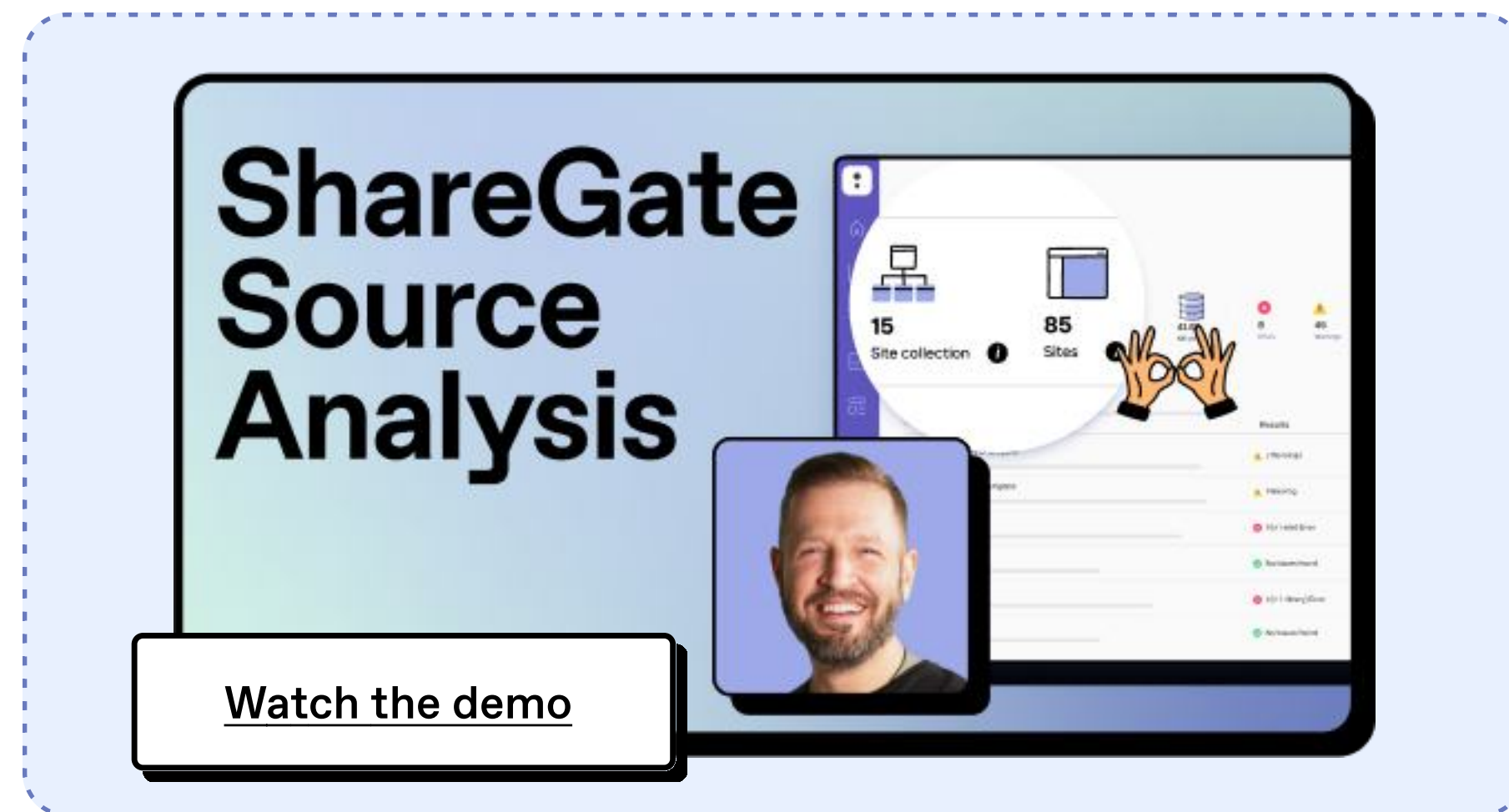
ShareGate’s incremental copy feature allows you to move only what’s changed since your last migration.
[See how it works here](#)

- 2 One giant leap:** A single-event migration allows you to move your environment in one go. Although this approach reduces the time you spend on migration, it poses a higher risk. This is where a third-party tool comes in handy to automate the process and ensure the least possible impact on end users and your organization.
- 3 Sequenced migration:** Move data in stages, one after the other in a specific order. This approach is typically automated so that the completion of one task triggers the next. However, if an error occurs, it can stall the entire sequence, leaving you with incomplete migrations.
- 4 Concurrent migration:** Run migrations on multiple workstations simultaneously. This creates a larger data pipeline, accelerating data transfer. If one migration stalls, the other keeps running smoothly.

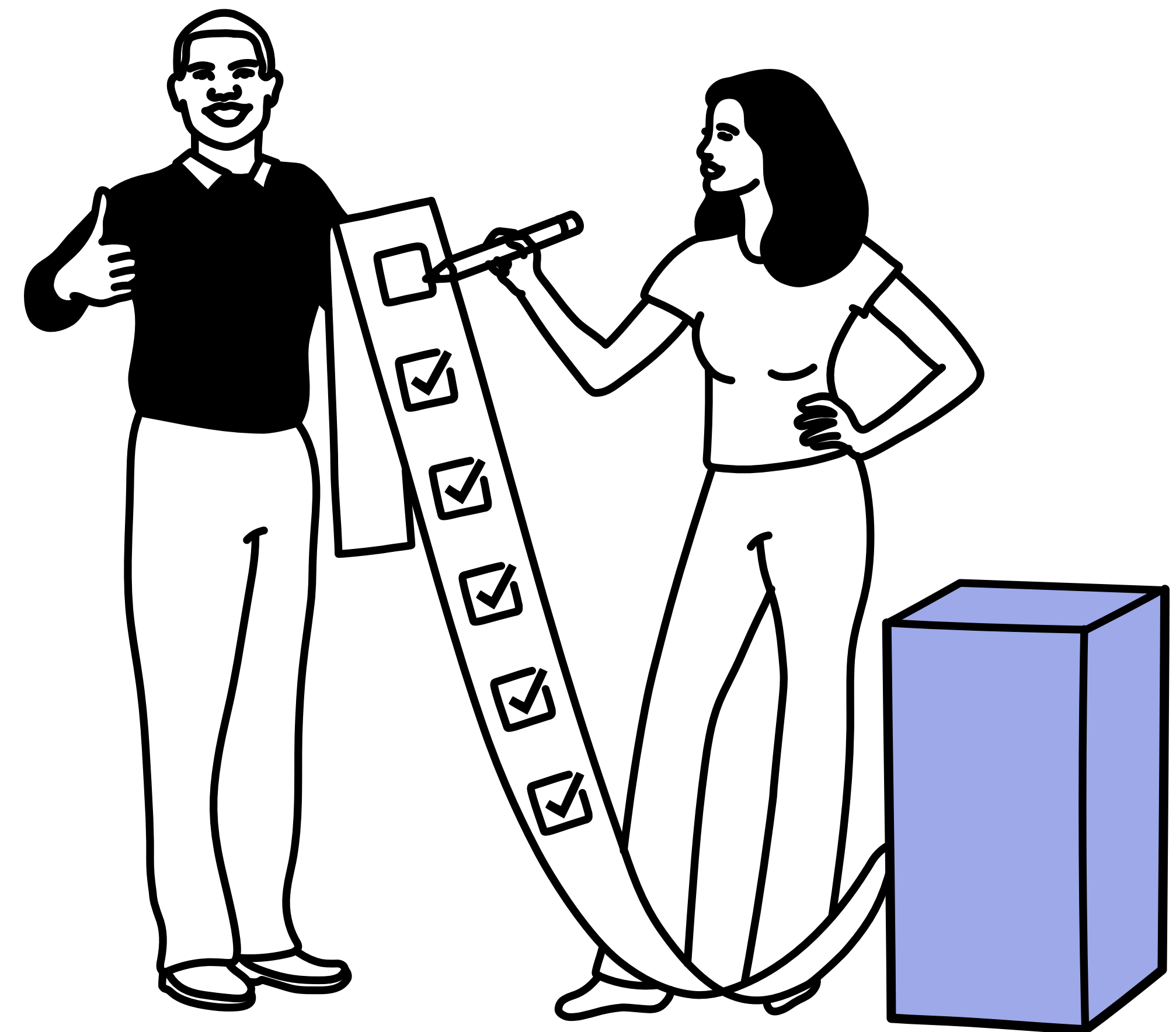
Prepare your migration

Run a source analysis to get a complete understanding of your environment's inventory and usage. With your free ShareGate trial, you can run a resource analysis to help you determine:

- ✓ The size of your environment
- ✓ The size of your file shares
- ✓ The number of site collections
- ✓ The number of sites
- ✓ The number of unused or abandoned sites
- ✓ The number of files and folders
- ✓ The number of workflows
- ✓ Potential issues



If you're ready to hit the ground running and want to fast-track your migration process, get started today with a full-featured trial of ShareGate's migration tool.



Step-by-step SharePoint migration

Whatever kind of SharePoint migration you're planning, if you're here, it's because you're ready to get started. But how should you do it? What should you move?

Creating a detailed migration plan will help you answer these questions and more.

Here are the steps you'll want to follow.



Take inventory

Among the most important pre-migration steps is taking a complete inventory of your current environment. This way, you can make better decisions about what to migrate and determine how long it will take to achieve a complete migration.

- ☐ Site collections
- ☐ Sites
- ☐ List and libraries
- ☐ Pages
- ☐ Web parts
- ☐ Shared files
- ☐ Tasks
- ☐ File size
- ☐ Documents
- ☐ Custom solutions
- ☐ Workflows
- ☐ Content types
- ☐ Site columns
- ☐ Templates
- ☐ Owners and permissions
- ☐ (Modern SharePoint) team site permissions through associated Microsoft 365 Groups
- ☐ User alerts
- ☐ Information protection policies
- ☐ Retention policies
- ☐ Records
- ☐ Users and groups used
- ☐ Large lists or libraries
- ☐ All files that have a dependency to another file using a URL
- ☐ Branding
- ☐ Any other UI customizations (JavaScript, altered menus, etc.)
- ☐ URL length

Clean up

Time to roll up your sleeves and do some cleaning. With people working in SharePoint every day, things can get messy fast. Once you have a solid inventory, start hammering away to weed out data that's redundant, unused, or no longer up to date. The goal is to migrate only what you need to create a more efficient environment that's easy to manage.

- ☐ Orphaned users
- ☐ Empty SharePoint groups
- ☐ Empty lists and libraries
- ☐ Unused custom content types, site columns, and workflows
- ☐ Sites that haven't been accessed or modified within a custom timeframe
- ☐ Duplicate content
- ☐ Items containing too many custom permissions
- ☐ Microsoft 365 Groups permissions
- ☐ Unwanted versions from your version history
- ☐ Recycle bin

TIPS FOR CLEANING UP

- ☐ Ask users to check in any document currently checked out, including those that have never been checked in (ensure you migrate the most recent version)
- ☐ Reorganize lists and libraries with too many columns
- ☐ Rethink and reorganize very large lists
- ☐ Promote sites to a site collection
- ☐ Use [pre-built or custom reports](#) to review the contents and health of your environment

Get ready

A SharePoint migration is a timely opportunity for a fresh start. Before you move, you'll need to prep your new home. Spend some time planning and structuring your environment according to your needs.

- ☐ Create your new environment's architecture
- ☐ Create and configure SharePoint hub sites settings accordingly
- ☐ Optimize your new SharePoint Servers' performance (at the install)
- ☐ Configure all Web Applications – check desired authentication and authorization rules
- ☐ Back up everything
- ☐ Test the restore
- ☐ Check the database for corrupt data and delete any
- ☐ Run a test migration
 - ☐ Highlight any unsupported elements
 - ☐ Resolve issues that occurred
 - ☐ Determine migration speed
 - ☐ Create a migration schedule that works for you
- ☐ Configure your new Search Topology
- ☐ Configure and synchronize user profiles in the new environment
- ☐ Set SharePoint up to import user profiles from any specific sources
- ☐ Map a plan for the metadata on your content
 - ☐ Update your metadata, bulk additions or edits to metadata
 - ☐ Optimize mapping of templates, columns, or users
- ☐ Look at your customizations – if required, convert them to work in the new model /destination
- ☐ Establish a governance plan

TIPS FOR CREATING A GOVERNANCE PLAN

- Define roles and responsibilities
- Classify your business information
- Configure guest access settings
- Review external access
- Map permissions and metadata of users or groups
- Define workspace collaboration templates
- Establish security strategies and processes
- Manage the lifecycle of your organization's data

Prepare your users

Throughout the migration, end-user training and communication are key factors to drive adoption. To achieve the best possible outcome, you'll want to make sure users understand the benefits behind the move. Determine what you'll offer in terms of training and support to set your team up for long-term success.

- ☐ Communicate your migration plan
 - ☐ Downtime planned
 - ☐ The reason for the change and the value for them
 - ☐ Possible changes in the environments
 - ☐ URL changes
 - ☐ SharePoint Sync
 - ☐ Bookmarks
 - ☐ Document references (Excel macros, etc.)
 - ☐ Estimated timeline
 - ☐ No working in the source location during migration
- ☐ Train users how to use SharePoint effectively
- ☐ Work with key users during migration

Migrate

It's essential to note the issues that arise during the migration and resolve them as needed. It's easier when you have the right tools that help to make sure your move is a successful one.

- ☐ Workflows
 - ☐ Complete or stop running workflows about to be migrated
- ☐ Use a third-party tool like PowerShell or ShareGate's migration tool to automate the process and restructure as you move
- ☐ Have a migration account with access to source and destination environments

Post-migration

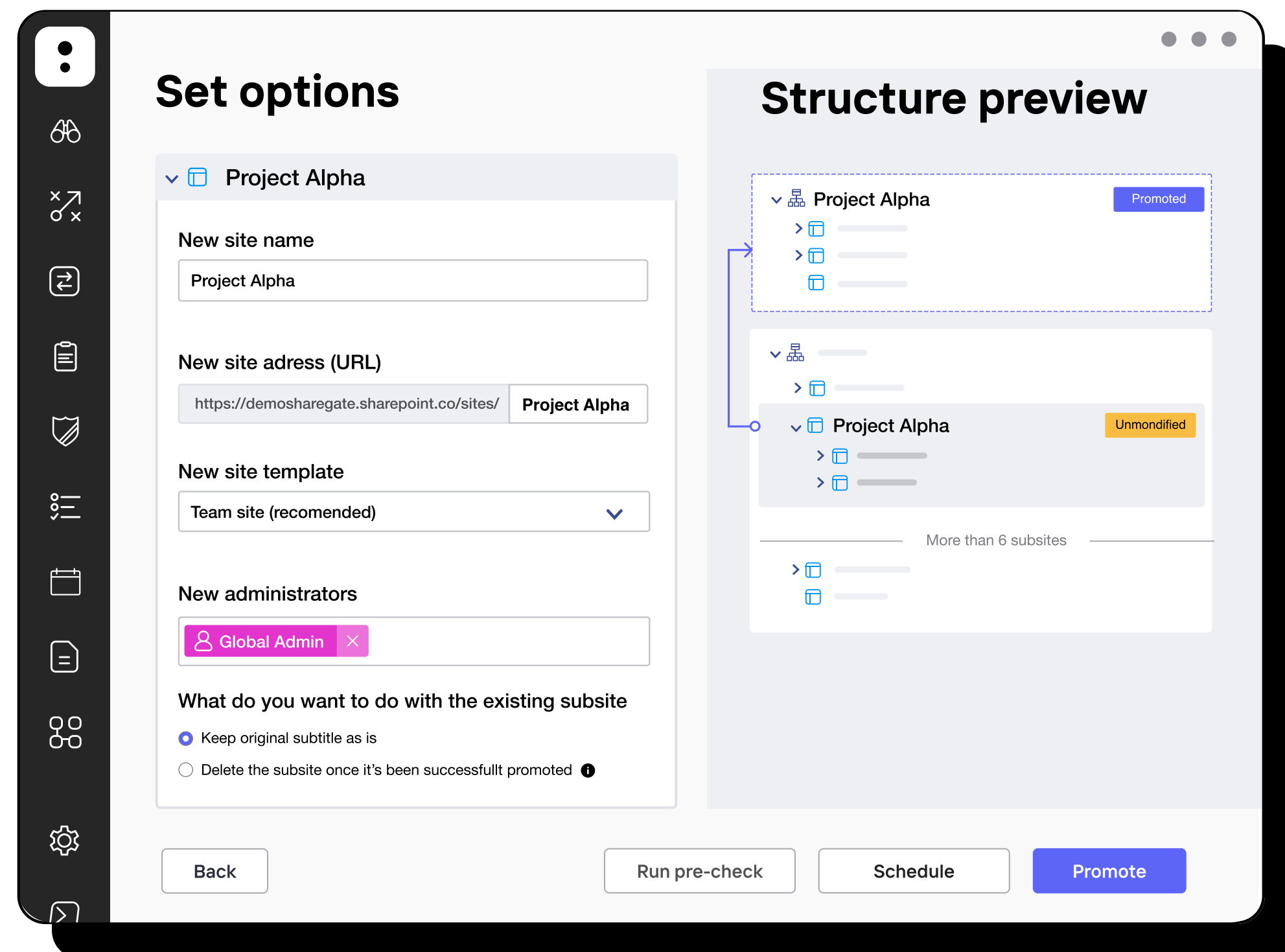
After making the move, you'll want to test everything out. Ensure the migration was successful and that everything is where it should be. A post-migration checklist plays a big role in reducing headaches before and after you swing open the doors and let everyone in.

- ☐ Ensure everything migrated successfully
 - ☐ Use ShareGate's post-migration report feature to see all the details of your migration
- ☐ Test/run all workflows
- ☐ Check user permissions
- ☐ Create a backup of your new environment
- ☐ Switch source to read-only mode
- ☐ Remove access to the old SharePoint
- ☐ Run a full crawl
- ☐ Run a script to remove sharing links
- ☐ Get the migration approved by key users
- ☐ Check in with end users to see how they are adjusting to their new environment

Modernize

To take advantage of new collaboration tools in Microsoft 365, your site architecture needs to go from top-down to flat. When you modernize your SharePoint environment, it's easier to work with Teams and move things around as your organization evolves. Using SharePoint sites, Lists, and other content types for collaboration ensures your users can work better together, from anywhere.

Instead of rebuilding what you already have, use a third-party tool like ShareGate to restructure your architecture in just a few clicks.



Ensure smooth collaboration and communication

Now that the essential files, folders, and data have been successfully migrated, turn your attention to your collaboration and communication tools. After all, they play a vital role in everyone’s day-to-day.

Migrate Microsoft Teams: Move channels, content, teams, conversation history, Planner plans, tabs, and more.

Migrate Exchange Online: Move messages, attachments, calendars and events, contacts, and folders to your destination.

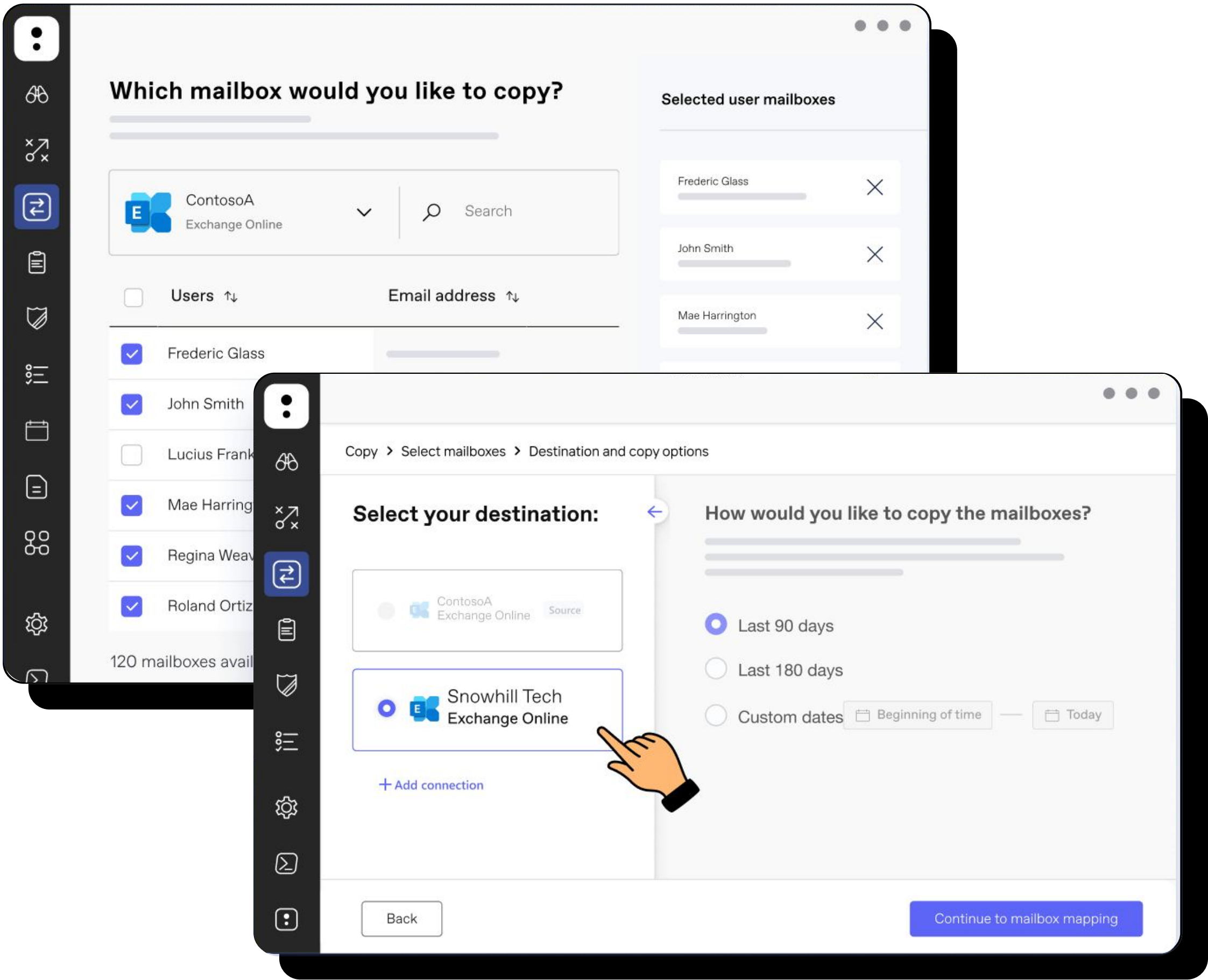
Manage and secure

After completing your migration, run regular reports to keep an eye on what’s happening in your environment, manage permissions, and make sure users are complying with your governance policies. The key to keeping on top of everything is automating and customizing SharePoint for your organization.



“We don’t have any anxiety after the fact... because we know that ShareGate just works.”

Doug Punchak, Application Development Manager, Avvenire Solutions



One tool to migrate faster and secure your tenant

ShareGate is your out-of-the box migration and governance solution for Microsoft 365, packed with best practices to guide you at every step.

Get accelerated migrations

Meet your deadlines with high-performance data transfer deployments

Move and modernize

Transform your Microsoft 365 environment with powerful configurations while maintaining data integrity

Leave no best practice behind

From planning to optimization to Microsoft 365 end-user training, make your migration a total success!

Secure your data

Keep your tenant in check, master the lifecycle of your workspaces, and get ready for Copilot



[Try it for free!](#) →

[Learn more](#) →

ShareGate
by workleap