



# Five Things You Need to Know Before a SharePoint Migration / Upgrade



With Microsoft announcing both the release of SharePoint 2016 and the discontinuance of SharePoint 2007 support, many businesses and government agencies must migrate to a newer version of SharePoint.

Here are five things you need to know before migrating to ensure you have a seamless transition:



## 1 There are 4 Distinct Ways You Can Migrate Your SharePoint Environment

SharePoint is a versatile platform with four distinct migration methods. Each approach has strengths and weaknesses.

- **In-place SharePoint Upgrade:** This method isn't actually a migration. Instead, you install a newer version of SharePoint in-place (that is, on the same hardware that is running your current version of SharePoint). It is the least time-consuming method, but it comes with limitations. First, you cannot hop versions; meaning you only upgrade to the next version of SharePoint. For example, if you have SharePoint 2007, you can only upgrade to SharePoint 2010. Second, in-place upgrades often introduce configuration problems when the appropriate pre- and post-migration actions are not executed.
- **Content Database Migration:** Known as the "detach database" method, you install and configure your new SharePoint environment on new hardware, detach the content database(s) from your old SharePoint environment and reattach the content database(s) to your new SharePoint environment. This method assures that 100% of your data is successfully migrated, but requires more time, disk space and network bandwidth than the in-place upgrade method.
- **Manual Data Migration:** Here, you install and configure your new SharePoint environment on new hardware and manually copy your data from the old to the new environment. It is by far the most time-consuming method and not often recommended. However, it may be the best option when a SharePoint environment has major problems that cannot be fixed.
- **Third-Party Tool Migration:** This method requires the purchase and installation of a third-party tool such as [Metalogix Content Matrix](#) or [AvePoint DocAve](#) to facilitate the migration process. While third-party tools simplify migration, allow data reorganization and support configuration updates, they are very expensive.

## 2 SharePoint Customizations Can Be Difficult to Migrate

Have you customized your SharePoint environment? For example, have you introduced customized Master Pages or incorporated custom-developed SharePoint solutions into your environment? If so, you need to prepare and execute a plan to successfully migrate your SharePoint customizations. With each SharePoint version release, Microsoft changes the underlying code base. Therefore, custom code that works perfectly with one version of SharePoint often has problems with newer versions. Be sure to identify all customizations prior to migration, as it may be necessary to test, recompile and redeploy these customizations in the new SharePoint environment.

## 4 Data Cleanup Makes Your Migration Much Easier


Before undertaking any SharePoint migration, analyze your existing SharePoint environment. You most likely have a lot of old, unused content as well as an outdated site collection and folder structure. SharePoint migrations give you an opportunity to analyze your existing system, discard old content and reorganize your site collection and folder structures.

## 3 Effective Communication and End-User Training Is Key

Transitioning to a new SharePoint environment can be scary to users. You can assuage their fears with effective communication and end-user training. SharePoint can be a powerful tool, but only when employees know how to use its features. Understanding the way your users use SharePoint for their daily tasks enables you to address their individual concerns after migration and effectively communicate how to use the new features. Strategic communication and end-user training are two essentials in gaining staff buy-in and empowering them to use SharePoint as a collaborative business process and workflow tool and not just a document management tool.

## 5 SharePoint Governance Enforcement Tools are Essential

What is SharePoint governance? SharePoint governance encompasses the policies, procedures, guidelines and permissions needed to assure that SharePoint content remains organized and aligned with your business needs. Every organization should create a unique governance document. But, creating a governance document is only the first step. The SharePoint environment must contain governance enforcement tools. While SharePoint offers built-in features for governance (including user permissions, document management, version control, etc.), these tools are not enough. Invest in governance enforcement tools, such as Metalogix, to ensure that your SharePoint environment does not become disorganized and incoherent.



➤ Knowing these five SharePoint migration tips will put you and your agency on the right track to a successful transition and allow your staff to be more productive.

### About cFocus Software Incorporated

cFocus Software Incorporated, established in 2006, provides custom SharePoint development, cybersecurity, business intelligence, business process automation and information assurance services to federal government and commercial clients. cFocus Software is dedicated to understanding the needs of our customer and implementing cost-effective, innovative solutions that enhance customer productivity. We are a Microsoft Partner with Gold Competency, ISO 9001:2008 certified and a certified participant in the Small Business Administration's 8(a) program. For more information, please visit: [www.cfocussoftware.com](http://www.cfocussoftware.com).



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