



SHAREPOINT MIGRATION CHECKLIST

When transitioning from an earlier version of SharePoint to SharePoint Online (O365), use this checklist to plan a successful migration

SITE CONFIGURATION

Analyze your site configuration to ensure the functionality and end user experience are upheld post migration

- Determine number and types of Site Collections currently in usage
- Identify when sites were last used and the frequency of which content is modified
- Determine whether sites not modified within the past 2 years will be migrated to an active site, archived or deleted entirely
- Determine number of users and permissions
- Identify content author and if they are still with your organization or in a different role
- Determine whether a Group and Team will be created per site collection
- Determine if any workflows have been built

DOCUMENT LIBRARIES

Analyze the content of your document libraries

- Review document libraries for volume, count, and indexed columns
- Identify libraries without any categorization (i.e. columns and data values)
- Identify lookup values mapped to the data value of column
- Review column data values to identify opportunity to normalize or consolidate values (e.g. 'United States', 'United States of America', 'USA' = 'United States')
- Determine if the columns are related to other sites or libraries. If so, define 'Site Columns' and/or 'Managed Metadata' properties and values
- Identify documents that do not serve a long-term legal or operational value
- Purge transitory information in advance to migration where possible
- Identify content authors and if they are still with your organization or in a different role

LISTS

Analyze the content of your lists

- Review lists for volume, count and indexed columns
- Identify lookup values mapped to other List and Document Libraries
- Identify opportunity to simplify values (e.g. 'United States', 'United States of America', 'USA' = 'United States')
- Identify which columns, where users can add manually, can be standardized from the bottom up (e.g. Document Types)
- Determine if the columns are related to other sites or libraries. If so, define 'Site Columns' and/or 'Managed Metadata' properties and values
- Identify content author(s) and if they are still with your organization or in a different role

RECORDS RETENTION AND CLASSIFICATION

Analyze your data retention and classification controls to ensure content is accurately managed through its lifecycle

- Review content types where an Information Management Policy has been applied (as these will need to be converted to 'Retention Labels')
- Create or refer to a list of records classification and retention criteria based on legislated and operational requirements to store information
- Map out how the Retention Labels will be applied either at a Site, Library, or Document Type level (Note: this method enables classifications to be inherited by the documents contained therein)
- Specify Retention Labels that will be applied using: Auto Classification, Power Automate (flows), or Machine Learning (Note: E5 licensing may be required depending on your solution design)
- Determine if the Information Management Policies are calendar or event based retentions
- Determine if any event based retentions have been associated with other systems for event triggers

CONTENT TYPES

Identify predefined categories of information that that drive standard treatment of a document

- Any content types used
- How many?
- Which libraries/lists are they assigned to?
- Attached to site columns?
- Site Collection or hub level parent content types?

METADATA

- Determine what is proper
- Obtain list of properties and data values
- Identify which columns are used across multiple lists/libraries to determine eligibility to become site columns

SECURITY

- Review all existing security groups and list them
- Identify unique permissions to specific sites, libraries/lists, folders and documents
- Identify broken inheritance
- Map existing user groups to O365 Groups and SharePoint user groups

MISCELLANEOUS

- Workflows - determine any workflows are being actively used and will have to be rebuilt in Power Automate
- Webparts determine if any webparts have been deprecated and no longer compatible in the new environment
- Use a data migration tool (or vendor) to assist: Bittitan, Mover, or ShareGate

