



# Migrate on- premises to SharePoint Online

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# Executive summary

## Overview

The migration of on-premises data to SharePoint Online represents a strategic move towards modernizing your IT infrastructure, enhancing collaboration, and improving data accessibility. This transition aligns with our digital transformation goals, ensuring that our organization leverages cloud-based technologies to drive efficiency, security, and scalability.

## Objectives

- **Enhanced Collaboration:** Facilitate seamless collaboration across teams and departments, regardless of geographic location.
- **Increased Accessibility:** Provide secure, anytime-anywhere access to critical business documents and data.
- **Improved Security:** Leverage Microsoft's robust security measures, including data encryption, compliance standards, and regular updates.
- **Scalability and Flexibility:** Scale our storage needs dynamically without the limitations of physical infrastructure.
- **Cost Efficiency:** Reduce the costs associated with maintaining on-premises servers, including hardware, power, and physical space.

## Key Benefits

1. **Improved Productivity:** Streamlined workflows and real-time collaboration features enhance productivity and efficiency.
2. **Security and Compliance:** SharePoint Online offers advanced security features and compliance with various industry standards.
3. **Cost Savings:** Lower total cost of ownership by eliminating the need for on-premises server maintenance and upgrades.
4. **Enhanced User Experience:** Intuitive interfaces and integration with other Microsoft 365 applications improve user adoption and satisfaction.
5. **Business Continuity:** Robust backup and disaster recovery capabilities ensure data availability and business continuity.

## Migration Strategy

1. **Assessment and Planning**
  - Conduct a thorough assessment of current on-premises data, including file types, sizes, and access patterns.
  - Develop a detailed migration plan with timelines, resource allocation, and risk management strategies.
2. **Preparation**
  - Cleanse and organize data to ensure only necessary and relevant information is migrated.
  - Set up SharePoint Online environment, including site structures, permissions, and metadata configurations.

### 3. Migration Execution

- Utilize migration tools and services to transfer data from on-premises to SharePoint Online.
- Perform incremental migrations to minimize downtime and ensure data integrity.

### 4. Post-Migration

- Validate the migration by conducting thorough testing and verification of data accuracy and accessibility.
- Provide training and support to users to facilitate a smooth transition and adoption of new systems.

### 5. Optimization and Governance

- Continuously monitor and optimize the SharePoint environment for performance and cost-efficiency.
- Implement governance policies to maintain data quality, security, and compliance.

## Challenges and Mitigation

- **Data Sensitivity:** Ensure sensitive data is handled with the highest security standards during migration.
- **User Adoption:** Address change management by providing comprehensive training and support.
- **Downtime Risk:** Minimize downtime through careful planning and phased migration approaches.

## Conclusion

Migrating to SharePoint Online is a pivotal step towards future-proofing your IT infrastructure. By embracing this cloud-based solution, we enhance our organization's agility, productivity, and security. The strategic benefits far outweigh the challenges, positioning us for sustained growth and success in the digital era. The commitment to a well-planned and executed migration will ensure a smooth transition and maximize the value derived from SharePoint Online.

## Migration project lifecycle

1. Pre-migration assessment on current environment
2. Highlight errors that will prevent data from being migrated
3. Run migration from source to destination
4. Verify migration has completed successfully
5. Validate the migrated data to ensure data is intact
6. Handover to customer

# Migration tools

Depending on the type of migration there are various tools that can be used for this purpose. Please note Microsoft's provided tool comes part of your tenant, 3<sup>rd</sup> party tools come at a cost of licensing to use.

1. SharePoint migration tool, this tool can be used for the following migrations

- Box
- File Shares
- Google Workspace
- Dropbox
- SharePoint server
- SharePoint server workflows
- SharePoint server classic pages

2. Sharegate 3<sup>rd</sup> party tool

The screenshot displays the Sharegate 3<sup>rd</sup> party tool interface, which is organized into three main sections:

- Supported sources:** This section lists various data sources that can be migrated, including SharePoint 2003 & 2007, SharePoint 2010, SharePoint 2013, SharePoint 2016, SharePoint 2019, and SharePoint Online. Other supported sources include Microsoft Teams, Microsoft 365, Local and shared drives, OneDrive for Business, Google Drive, and Box. Additionally, Office 365, Planner, and Exchange Online are listed.
- Supported targets:** This section lists the destinations where data can be migrated, including SharePoint 2010, SharePoint Server 2010, Microsoft 365, OneDrive for Business, SharePoint Online, and SharePoint 2013. Other supported targets include SharePoint 2016, SharePoint 2019, Microsoft Teams, Office 365, Planner, and Exchange Online.
- Supported objects and attributes:** This section lists the types of data objects and attributes that can be migrated. The objects include Calendars, Contacts, Content types, Documents (with sub-items for Security, Sets, and Version history), Folders, Libraries and lists, List items, List views and forms, Managed metadata, Messages, Attachments, Categories, Server-side rules, Microsoft Teams, Nintex workflows and forms, OneDrive for Business, Permissions and permission levels, Planner, Shared mailboxes, SharePoint groups, and SharePoint workflows (standard and SharePoint Designer). The attributes include Site collections, Site columns, Site Navigation, Site Settings, Sites, Subsites, Teams apps, Teams channels and conversations, Teams tabs, User Alerts, and Web parts.

# Using the SharePoint migration tool

## 1. Preparation

Before starting the migration process, ensure the following prerequisites are met:

- **Microsoft 365 Subscription:** Ensure you have an active Microsoft 365 subscription with SharePoint Online.
- **Permissions:** You must have the necessary permissions to access the source data and write to the destination SharePoint Online sites.
- **Data Assessment:** Conduct a thorough assessment of the data to be migrated, including identifying file sizes, types, and any potential issues that could impact the migration.

## 2. Download and install the SharePoint Migration Tool

1. **Download the SPMT:**
  - Visit the [Microsoft Download Center](#) to download the SharePoint Migration Tool.
2. **Install the SPMT:**
  - Run the downloaded installer and follow the prompts to complete the installation.

## 3. Pre-migration Assessment

1. **Identify Source Data:**
  - Determine which on-premises data you need to migrate. This could be files from file shares, SharePoint Server sites, or other on-premises sources.
2. **Organize Data:**
  - Organize the data into a structure that will facilitate the migration process. Clean up unnecessary files and ensure data integrity.

## 4. Highlight Errors

1. **Run Pre-migration Scan:**
  - Open the SPMT and run a pre-migration scan to identify any potential issues that could prevent data from being migrated.
2. **Resolve Errors:**
  - Address any errors or warnings identified by the scan. This might involve renaming files, adjusting permissions, or resolving other issues.

## 5. Configure Migration Settings

1. **Open SPMT:**
  - Launch the SharePoint Migration Tool.
2. **Sign In:**
  - Sign in with your Microsoft 365 account credentials.
3. **Select Source:**

- Choose the data source (e.g., file shares, SharePoint Server) from which you will migrate data.
- 4. **Select Destination:**
  - Specify the SharePoint Online site or document library where the data will be migrated.

## 6. Run Migration

1. **Start Migration:**
  - Begin the migration process by clicking the "Migrate" button. The tool will start transferring data from the source to the destination.
2. **Monitor Progress:**
  - Monitor the progress of the migration through the SPMT interface. The tool provides real-time status updates and logs any issues encountered.

## 7. Verify Migration

1. **Check Completion:**
  - Once the migration is complete, verify that all data has been successfully transferred to the SharePoint Online site.
2. **Review Logs:**
  - Review the migration logs provided by the SPMT to identify any errors or files that may not have been migrated.

## 8. Validate Migrated Data

1. **Data Integrity Check:**
  - Conduct a thorough check to ensure that the migrated data is intact and accessible. Verify file integrity and confirm that all necessary files are present.
2. **Permissions Verification:**
  - Ensure that the permissions on the migrated data are correctly set and that users have the appropriate access.

## 9. Handover to Customer

1. **User Training:**
  - Provide training to end-users on how to access and use the migrated data in SharePoint Online.
2. **Documentation:**
  - Prepare and hand over documentation detailing the migration process, any issues encountered, and how they were resolved.
3. **Support:**
  - Offer post-migration support to address any issues or questions from users.

## Tips for a Successful Migration

- **Incremental Migration:** Consider performing the migration in stages to minimize disruption and allow for thorough testing at each step.



- **Backup:** Ensure that a backup of the source data is available in case of any issues during the migration.
- **Communication:** Keep stakeholders informed throughout the migration process to manage expectations and address any concerns promptly.

## Using the SharePoint Online migration tool

The SharePoint Online Migration Tool (SPMT) is a powerful tool provided by Microsoft to facilitate the migration of data from various sources to SharePoint Online. This guide will provide step-by-step instructions for using the SPMT to ensure a successful migration.

### 1. Preparation

Before starting the migration process, ensure the following prerequisites are met:

- **Microsoft 365 Subscription:** Ensure you have an active Microsoft 365 subscription with SharePoint Online.
- **Permissions:** You must have the necessary permissions to access the source data and write to the destination SharePoint Online sites.
- **Data Assessment:** Conduct a thorough assessment of the data to be migrated, including identifying file sizes, types, and any potential issues that could impact the migration.

### 2. Download and Install the SharePoint Migration Tool

1. **Download the SPMT:**
  - Visit the [Microsoft Download Center](#) to download the SharePoint Migration Tool.
2. **Install the SPMT:**
  - Run the downloaded installer and follow the prompts to complete the installation.

### 3. Pre-migration Assessment

1. **Identify Source Data:**
  - Determine which data sources you need to migrate. SPMT supports file shares, SharePoint Server sites, and other on-premises sources.
2. **Organize Data:**
  - Organize the data into a structure that will facilitate the migration process. Clean up unnecessary files and ensure data integrity.

### 4. Highlight Errors

1. **Run Pre-migration Scan:**
  - Open the SPMT and run a pre-migration scan to identify any potential issues that could prevent data from being migrated.
2. **Resolve Errors:**
  - Address any errors or warnings identified by the scan. This might involve renaming files, adjusting permissions, or resolving other issues.

## 5. Configure Migration Settings

1. **Open SPMT:**
  - Launch the SharePoint Migration Tool.
2. **Sign In:**
  - Sign in with your Microsoft 365 account credentials.
3. **Select Source:**
  - Choose the data source from which you will migrate data. SPMT supports various sources such as:
    - File shares
    - SharePoint Server 2010, 2013, 2016, or 2019
    - OneDrive
    - Google Drive
4. **Select Destination:**
  - Specify the SharePoint Online site or document library where the data will be migrated.

## 6. Configure Migration Settings for Various Sources

### File Shares

1. **Add Source Path:**
  - Enter the path to the file share.
2. **Select Destination:**
  - Choose the destination SharePoint Online site and document library.

### SharePoint Server

1. **Add Source Site:**
  - Enter the URL of the SharePoint Server site.
2. **Select Destination:**
  - Choose the destination SharePoint Online site and document library.

### OneDrive

1. **Add OneDrive Source:**
  - Sign in to the OneDrive account and select the files or folders to migrate.
2. **Select Destination:**
  - Choose the destination SharePoint Online site and document library.

### Google Drive

1. **Add Google Drive Source:**
  - Sign in to the Google Drive account and select the files or folders to migrate.
2. **Select Destination:**
  - Choose the destination SharePoint Online site and document library.

## 7. Run Migration

1. **Start Migration:**
  - Begin the migration process by clicking the "Migrate" button. The tool will start transferring data from the source to the destination.
2. **Monitor Progress:**
  - Monitor the progress of the migration through the SPMT interface. The tool provides real-time status updates and logs any issues encountered.

## 8. Verify Migration

1. **Check Completion:**
  - Once the migration is complete, verify that all data has been successfully transferred to the SharePoint Online site.
2. **Review Logs:**
  - Review the migration logs provided by the SPMT to identify any errors or files that may not have been migrated.

## 9. Validate Migrated Data

1. **Data Integrity Check:**
  - Conduct a thorough check to ensure that the migrated data is intact and accessible. Verify file integrity and confirm that all necessary files are present.
2. **Permissions Verification:**
  - Ensure that the permissions on the migrated data are correctly set and that users have the appropriate access.

## 10. Handover to Customer

1. **User Training:**
  - Provide training to end-users on how to access and use the migrated data in SharePoint Online.
2. **Documentation:**
  - Prepare and hand over documentation detailing the migration process, any issues encountered, and how they were resolved.
3. **Support:**
  - Offer post-migration support to address any issues or questions from users.

## Tips for a Successful Migration

- **Incremental Migration:** Consider performing the migration in stages to minimize disruption and allow for thorough testing at each step.
- **Backup:** Ensure that a backup of the source data is available in case of any issues during the migration.
- **Communication:** Keep stakeholders informed throughout the migration process to manage expectations and address any concerns promptly.

## Using the Sharegate migration tool

The ShareGate Migration Tool is a powerful and user-friendly solution for migrating data from on-premises environments to SharePoint Online. This guide provides step-by-step instructions to ensure a smooth and successful migration process.

### 1. Preparation

Before starting the migration process, ensure the following prerequisites are met:

- **Microsoft 365 Subscription:** Ensure you have an active Microsoft 365 subscription with SharePoint Online.
- **Permissions:** You must have the necessary permissions to access the source data and write to the destination SharePoint Online sites.
- **Data Assessment:** Conduct a thorough assessment of the data to be migrated, including identifying file sizes, types, and any potential issues that could impact the migration.

### 2. Download and Install the ShareGate Migration Tool

1. **Download ShareGate:**
  - Visit the [ShareGate website](#) to download the ShareGate Migration Tool.
2. **Install ShareGate:**
  - Run the downloaded installer and follow the prompts to complete the installation.

### 3. Pre-migration Assessment

1. **Identify Source Data:**
  - Determine which on-premises data you need to migrate. This could be files from file shares, SharePoint Server sites, or other on-premises sources.
2. **Organize Data:**
  - Organize the data into a structure that will facilitate the migration process. Clean up unnecessary files and ensure data integrity.

### 4. Configure ShareGate for Migration

1. **Open ShareGate:**
  - Launch the ShareGate Migration Tool.
2. **Sign In:**
  - Sign in with your ShareGate account credentials.

## 5. Establish Connection to Source and Destination

1. **Connect to Source:**
  - Click on "Copy Structure" or "Copy Content" depending on your needs.
  - Connect to your source environment by providing the URL of your on-premises SharePoint site or file share location.
  - Authenticate using appropriate credentials.
2. **Connect to Destination:**
  - Enter the URL of your SharePoint Online site.
  - Authenticate using your Microsoft 365 account credentials.

## 6. Highlight Errors

1. **Run Pre-migration Check:**
  - Use ShareGate's built-in pre-migration analysis to identify any potential issues that could prevent data from being migrated.
2. **Resolve Errors:**
  - Address any errors or warnings identified by the scan. This might involve renaming files, adjusting permissions, or resolving other issues.

## 7. Configure Migration Settings

1. **Select Content to Migrate:**
  - Choose the specific lists, libraries, or files you want to migrate from the source environment.
2. **Configure Mapping:**
  - Map users, content types, and columns from the source environment to the destination environment to ensure data consistency.

## 8. Run Migration

1. **Start Migration:**
  - Begin the migration process by clicking the "Start Copy" or "Start Migration" button. The tool will start transferring data from the source to the destination.
2. **Monitor Progress:**
  - Monitor the progress of the migration through the ShareGate interface. The tool provides real-time status updates and logs any issues encountered.

## 9. Verify Migration

1. **Check Completion:**
  - Once the migration is complete, verify that all data has been successfully transferred to the SharePoint Online site.
2. **Review Logs:**
  - Review the migration logs provided by ShareGate to identify any errors or files that may not have been migrated.

## 10. Validate Migrated Data

1. **Data Integrity Check:**
  - Conduct a thorough check to ensure that the migrated data is intact and accessible. Verify file integrity and confirm that all necessary files are present.
2. **Permissions Verification:**
  - Ensure that the permissions on the migrated data are correctly set and that users have the appropriate access.

## 11. Post-migration Activities

1. **User Training:**
  - Provide training to end-users on how to access and use the migrated data in SharePoint Online.
2. **Documentation:**
  - Prepare and hand over documentation detailing the migration process, any issues encountered, and how they were resolved.
3. **Support:**
  - Offer post-migration support to address any issues or questions from users.

## Tips for a Successful Migration

- **Incremental Migration:** Consider performing the migration in stages to minimize disruption and allow for thorough testing at each step.
- **Backup:** Ensure that a backup of the source data is available in case of any issues during the migration.
- **Communication:** Keep stakeholders informed throughout the migration process to manage expectations and address any concerns promptly.

By following this comprehensive guide, you can effectively use the ShareGate Migration Tool to migrate data from on-premises environments to SharePoint Online, ensuring a smooth and successful transition.