

# The Compass Guide: SharePoint 2013 to SharePoint Online Migrations

# TABLE OF CONTENTS

<b>INTRODUCTION</b>	2
<b>END OF SUPPORT FOR SHAREPOINT 2013</b>	3
<b>BENEFITS OF MODERNIZATION</b>	5
Why Choose SharePoint Online?	6
The Case for Modernization	7
The Modern SharePoint Experience	8
Choosing Your Modernization Approach	9
<b>KNOW BEFORE YOU GO</b>	10
Proper Planning	12
Involve the Business	13
Create a Communications Plan	13
Decide on Modernization Approach	14
<b>SHAREPOINT MIGRATION METHODOLOGY</b>	15
Assessment and Planning	16
Migrate with Minimal Disruption	17
Focus on User Adoption	17
A Foundation for Digital Transformation	18
Complimentary SharePoint 2013 Migration Discovery	18
<b>ABOUT COMPASS365</b>	19

# INTRODUCTION

## EXTENDED SUPPORT FOR SHAREPOINT 2013 ENDS APRIL 11, 2023!

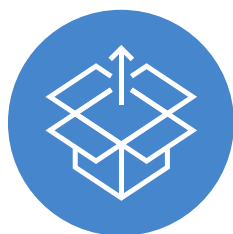
What does this mean?

After that date Microsoft will no longer provide:

- Technical support
- Bug fixes
- Security patches

Running SharePoint 2013 past the end of support date is risky and may result in disruption to business services.

While it is commonly known that migrating from SharePoint 2013 to SharePoint Online is not a simple lift and shift effort, it may come as a surprise to learn just how many issues need to be addressed to ensure full functionality once the migration is complete. Based on the complexity of the situation, migrations to SharePoint Online can take anywhere from two to six months. If your organization is still running SharePoint 2013 this eBook will help you start planning for your migration to SharePoint Online before time runs out.



**JANUARY 9,  
2013**

Original release of  
SharePoint 2013



**APRIL 10,  
2018**

Mainstream support  
ended



**APRIL 11,  
2023**

Extended support ends



# End of Support for SharePoint 2013

ARE YOU READY?

# END OF SUPPORT

Taking on a migration project might not be at the top of your to-do list, but you may want to reprioritize after hearing the risks associated with running SharePoint 2013 unsupported.



## END OF SUPPORT

You are on your own when it comes to support. Yes, this sounds like an obvious one, but we had to list it. Technical support will no longer be offered for SharePoint 2013 after April 2023 without incurring added charges, which can be quite expensive.



## WEAKENED SECURITY

When a product is still under support, patches are deployed routinely to keep up with the ever-changing tactics of current-day hackers and cybercriminals. When support ends it also means the end of those security patches that keep us protected. Without up-to-date patching capabilities, your organization will be left much more vulnerable to security breaches with no support from Microsoft available if one does occur.



## BUSINESS INTERRUPTION

Over time components and solutions which may be critical to your business users become less and less reliable and more prone to failure. Without the support of Microsoft to quickly get you up and running again should a failure occur, your team could experience extended downtime to coordinate an unsupported fix, if a fix is possible at all.

The background is a solid teal color with a faint, stylized pattern of interlocking gears and circuitry lines. The gears are of various sizes and are positioned in the upper half of the image. The circuitry lines are more intricate and are located in the lower half, creating a technical and modern aesthetic.

# Benefits of Modernization

MAKE THE MOVE TO SHAREPOINT ONLINE

# BENEFITS OF MODERNIZATION

## WHY CHOOSE SHAREPOINT ONLINE?

Along with the risks that go with running a retired Microsoft product, the benefits of modernization are also a compelling reason to make the move to SharePoint Online.

Microsoft recommends migrating to SharePoint Online over an on-premises deployment to maximize your Microsoft 365 investment and offer users the full modern experience. The following quote and table are from the Microsoft documentation article [Upgrading from SharePoint 2013](#):

*"We recommend migrating to SharePoint in Microsoft 365 to take advantage of the latest collaboration, intelligence, and security solutions in Microsoft 365. The modern experience features in Microsoft 365 are designed to be compelling, flexible, and performant."*

End of support product	Good	Better	Best
SharePoint Server 2013 SharePoint Foundation 2013	Upgrade to SharePoint Server 2016 or 2019	Upgrade to SharePoint Server Subscription Edition	Migrate to SharePoint in Microsoft 365

If moving to the cloud is not an option, an upgrade to SharePoint Server 2019 or SharePoint Server Subscription Edition are both viable options.

# BENEFITS OF MODERNIZATION

## THE CASE FOR MODERNIZATION

The modern experience in Microsoft SharePoint Online is designed to be compelling, flexible, mobile-ready, and perform better. The improvements in the modern experience in SharePoint Online include:



Easier-to-maintain architecture built around hub sites and site collections



Increased options for navigation experiences



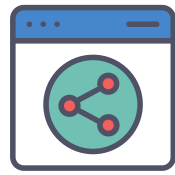
Modern, responsive templates and themes



Beautiful and dynamic Communication sites and pages



Expanded search options with Microsoft Search



Added sharing and permissions with Microsoft 365 groups



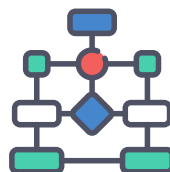
Improved platform and component performance



Enhanced multilingual support for intranet content



Secure, easy-to-configure sharing and collaboration with external users



Integration with modern electronic form and workflow automation



Leverage Microsoft Teams for collaboration and communication

# BENEFITS OF MODERNIZATION

## THE MODERN SHAREPOINT EXPERIENCE

### MODERN TEAM SITES

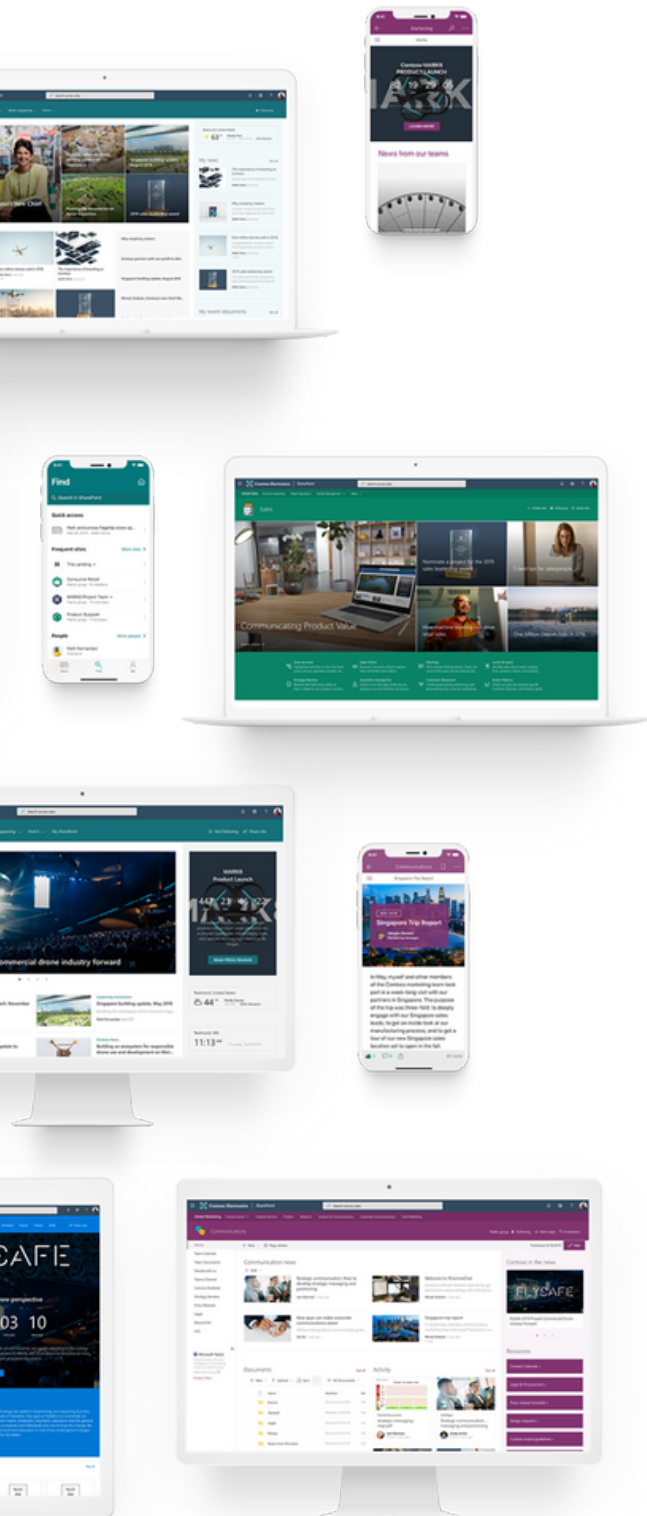
Modern team sites are sites that bring a fresh, new responsive user experience to SharePoint Online, showing relevant information on the home page. Integrated with Microsoft 365 groups, these sites are faster to create and use, and include modern lists and libraries with support for Microsoft Power Apps and Power Automate.

### MODERN LIST AND LIBRARY EXPERIENCES

Modern list and library experiences bring a better user experience that is faster, more intuitive, and responsive. Mobile browsers have the same features as the desktop, making SharePoint productive independent of how they interact – mouse, keyboard, touch, or screen reader.

### MODERN SITE PAGES

Modern site pages are fast, easy to author, and support rich multimedia content. They are built using web parts and look great on any browser and mobile device.



# BENEFITS OF MODERNIZATION

## CHOOSING YOUR MODERNIZATION APPROACH

Modern experiences bring a fresh look, feel, and usage of SharePoint that is considered an improvement over classic SharePoint. While these experiences are being gradually released in SharePoint Online, you are not forced to use them and, in some cases, you may not be ready to use them. The controls are applied at the tenant or site level. A major consideration is the type of customizations in use in your environment and if/how they will function in the modern experience. To figure out the next steps, we recommend the following:



### EVALUATE READINESS

Determine your organization's readiness by understanding what features are included or are not yet available in the modern experience, and what value these changes bring to your user base.



### ASSESS CUSTOMIZATIONS

Assess to what extent your current customizations will work within the modern experience and which sites have customizations or features that will not work. These sites will need to be updated or remain in classic mode.



### CONSIDER RESOURCES

Decide if you have the time and stakeholder support to modernize as you migrate. If not, you can come back to it once you are migrated into SharePoint Online.



# Know Before You Go

KEY MIGRATION CONSIDERATIONS

# KNOW BEFORE YOU GO

As a Microsoft Gold Partner working with SharePoint since 2007, we have successfully delivered upgrades and migrations for organizations ranging from medium sized non-profits to state/local government agencies through Fortune 100 global corporations. While we often work with clients seeking end-to-end migration services, we do encounter organizations that need migration remediation services for a migration to SharePoint Online that missed the mark.

Common issues that cause IT and Business leaders to seek help:



Content is missing



Pages will not load



Links are broken



Workflows will not  
run



Lists do not work



Conflicts arise with  
other line of  
business systems



Users confused by  
the mix of modern  
and classic sites

These issues cost the business, put pressure on IT, and often result in a lack of trust in the new system and a failed effort. In most cases, these problems are avoidable.

# KNOW BEFORE YOU GO

## PROPER PLANNING

Your migration may be simple or extremely complex, depending on the amount of content you have, how it is structured, and what customizations exist in the current environment. A common mistake is to underestimate the time, effort, and resources needed to ensure a successful migration.

Microsoft offers a free tool, the [SharePoint Migration Assessment Tool](#) (SMAT), that when run on your current SharePoint 2013 environment, will provide you with vital information about your site and content. This includes items that may need to be addressed as part of the migration in order to work in SharePoint Online such as large lists, system interdependencies, custom branding, [InfoPath forms](#), SharePoint Designer workflows, custom code, and add-ons. Often, these are solutions that support critical business activity and processes that must be ready to use once you cut over. You will also likely find several abandoned sites and solutions that you can leave behind.

You will also want to address:



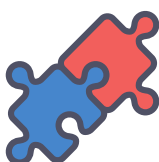
Licensing, storage,  
and support for  
desktop software



Training and user  
adoption services



Project budget,  
timeline, and  
resources needed



Integrations to line  
of business  
solutions, like CRM  
or ERP



Cleanup of empty  
lists and libraries,  
orphaned users,  
and complicated  
permissions

# KNOW BEFORE YOU GO

## INVOLVE THE BUSINESS

A SharePoint Online migration is not an IT-only project. A common pitfall is to marginalize the need for user involvement. While IT governs the platform, the business owns its content.

Key stakeholders from each department should be included throughout the project from planning workshops, in which their structure, content, and business processes are analyzed, to providing input on the new SharePoint structure, all the way through testing, training, and go-live. It may sound easier to “keep it simple” without the business involved, but you may end up with complications, issues, and failure to adopt.

## CREATE A COMMUNICATIONS PLAN

A key to migration success is the implementation of a [communications plan](#) around the migration project. As part of our methodology, we guide our clients to include regular communications and provide basic templates to help our clients keep their user communities informed, involved, and excited about the change – with no surprises and/or push back once you go live.

Communication campaigns should share information with users multiple times and in multiple formats leading up to the final cut-over, such as:

1. Project overview when kicking off the project
2. Monthly project updates, with training tips or new feature highlights
3. Invitation to participate in testing 2 – 4 weeks before test window
4. Invitation to training 2 – 4 weeks before final cut-over
5. Warning of system outage and final cut-over 2 weeks before, 1 week before, the day before, and immediately after the final cut-over

We can all get on board with change if we understand better [why and how it benefits us](#). Each interaction with the business pays dividends in maximizing the adoption of the new solution and ensuring your migration is a success.

# KNOW BEFORE YOU GO

## DECIDE ON MODERNIZATION APPROACH

There are times when a “lift and shift” migration to SharePoint Online makes sense. Migrating libraries and folder structures “as-is” when you can and replacing deprecated features and solutions with the bare minimum effort is called for if you are moving to the cloud to address an urgent situation, have budget constraints, security concerns with old operating systems, or to retire hardware. We work with clients who a) want to get into the cloud and b) then modernize. This does work – apart from features that SharePoint Online no longer supports, such as InfoPath forms and SharePoint 2010 workflows. Trouble can brew when you have a mix of classic and modern sites and features, confusing and frustrating users. We recommend planning for modernization during or soon after your migration to ensure user adoption.

With the proper budget and timeline, however, efforts can be made to take full advantage of the migration effort to:

- Clean up redundant, unused, and outdated data
- Reorganize lists and libraries that are too large and/or have too many columns
- Restructure using hub sites to allow for flexibility and change
- Consider Microsoft Teams as your interface for some SharePoint sites
- Simplify security and permissions
- Enable collaboration and sharing
- Implement a modern look and feel
- Re-engineer and modernize forms and workflows using Power Platform
- Establish a governance strategy
- Prioritize user adoption and training
- Deliver a foundational solution from which to continue to build and take full advantage of your Microsoft 365 investment





# SharePoint Migration Methodology

OUR PROVEN PROCESS

# MIGRATION METHODOLOGY

Over the past 15 years, we have established a proven, process-driven methodology that emphasizes upfront planning and decision making, incorporates business and IT stakeholders, minimizes user downtime, and ensures the users are enabled to work with the new system on day one. When we go live and your staff is prepared to work in the new environment with minimal disruption, we know we have done our job.

## ASSESSMENT AND PLANNING

As part of a Compass365 Migration Planning Assessment, we analyze your environment, hold workshops to guide decision making, deliver recommendations, project plan, schedule and budget, and outline dependencies, risks, and mitigations to ensure that your users can access what they need to do their jobs on day one of go-live in SharePoint Online.

We use the Microsoft SharePoint Migration Assessment Tool (SMAT), a farm configuration review, and other tools to inventory a complete list of considerations for review in your SharePoint 2013 farm:

- Sites and site collections – # and type
- Lists and libraries
- Large lists and libraries over the 5000-item list view threshold
- Custom solutions, add-ons, and integrations
- Forms and workflow
- Site columns, content types, and managed metadata
- Search configuration and customization
- Documents, file types, file size, and version history
- My Sites / OneDrive for Business sites
- All files that have a dependency to another file using URL
- URL length
- Owners and permissions
- Users and groups
- User alerts

# MIGRATION METHODOLOGY

- Publishing sites and customized pages
- Branding
- UI/JavaScript customizations
- Records and retention policies
- Information protection policies

While we do not dictate if and how these items should be handled, our Solutions Architects work collaboratively with your business and IT stakeholders to guide decision-making, ensuring that all considerations are accounted for and handled in alignment with the Microsoft roadmap and best practices during the migration.

## MIGRATE WITH MINIMAL DISRUPTION

Working from a Migration Runbook, our 2-step migration process ensures minimal downtime for your user community. First, the new site(s) are created and configured in SharePoint and Teams. We will then migrate content, analyze, test, and modernize any legacy solutions identified as critical to moving forward – all while your employees are still working as usual. Once everything is tested and approved, we will do a short delta migration, cut over to the new system, and support you for the first few weeks after go-live.

## FOCUS ON USER ADOPTION

The user experience of working in SharePoint Online can be vastly different for those used to working in SharePoint 2013. At Compass365, we establish a group of business and IT stakeholders for the project – super users, content creators, and department liaisons – who are involved in the project from start to finish and are being trained along the way. We create Quick Guides based on role and have a variety of training options ranging from train-the-trainer to training the organization, ensuring your staff are ready to use the system on day one.

# MIGRATION METHODOLOGY

## A FOUNDATION FOR DIGITAL TRANSFORMATION

Getting into the cloud is just the beginning of your modernization journey. Our clients continue to engage with us to take full advantage of the new tools and capabilities available to improve efficiency and engage and empower their employees. Common requests include:

- Enabling workplace collaboration with Microsoft 365
- Building workflows and forms in Power Platform
- Document and records management in SharePoint
- Developing engaging Intranet portals
- Increasing adoption of Teams and SharePoint
- Gaining insights to improve processes with Power BI

## SHAREPOINT 2013 MIGRATION DISCOVERY

Start your SharePoint 2013 migration planning during two complimentary discovery sessions with a Compass365 Microsoft Solutions Architect. Working from the SMAT, we will analyze your current sites and any complexities and provide you with recommendations, budget, and timeline to successfully migrate into SharePoint Online before the official end-of-life in April 2023.

### ANALYSIS SESSION

- Review SharePoint migration assessment reports
- Discuss found complexities
- Discuss your goals, timeline, and user adoption strategies
- Q&A

### MIGRATION SCOPE REVIEW SESSION

- Present and review migration scope and timeline
- Discuss approach and method
- Discuss potential roadblocks or challenges
- Q&A and Next Steps

**SCHEDULE YOUR COMPLIMENTARY MIGRATION DISCOVERY**

# ABOUT COMPASS365

## DELIVERING END-TO-END SHAREPOINT 2013 TO SHAREPOINT ONLINE MIGRATIONS

Many businesses and IT leaders have a vision for improving operations but are frustrated because they lack the resources, time, or expertise to get started. Compass365 combines our years of expertise with proven methods to help improve the way companies work, operate, and confidently get value from their Microsoft investment.

As a Microsoft Gold Partner, successfully delivering Microsoft solutions and services for more than 17 years, we've delivered 100s of successful SharePoint migrations for enterprise clients ranging from non-profits to state and local government to F-100 global organizations.

### ESTABLISHED IN 2007

We are the Microsoft 365 collaboration solutions services division of General Networks.

### MICROSOFT GOLD PARTNER

Competencies include Cloud Productivity and Collaboration and Content.

### EXPERIENCED TEAM

Our consultants hold over 12 Microsoft Certifications and an average tenure of 8 years.

### CLIENT FOCUSED

60% of our revenue comes from organizations we've done business with for 10+ years.

**Contact us today to schedule your complimentary discovery sessions with one of our Solutions Architects.**



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