

What it was *really* like migrating to SharePoint Online

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The Decision Process

- Directive: be on the leading edge of technology as a testing ground for our clients
- Lots of research – lots
- Project plan laid out
- Make the business case
- Test migrations, then do the real migration

The Business Case

- For IT
 - Inherent disaster recovery and restoration options
 - Minimized administration
 - No patching or upgrade downtime
 - Security improvements
 - Centralizes many services under one contract
 - Three-9 uptime guarantee (source: <http://bit.ly/1UVOpRC>)
 - Actuals are reported to customers
 - Almost no hardware support
 - Content is wipe-able upon lost device or terminated employee
 - Mobile administration tools and alerts
- For Users
 - External user access
 - Mobile access
 - Video portal
 - No VPN required
 - Huge file size support
 - SharePoint limits infographic: <http://tinyurl.com/SPUseLimits>

- Five licenses to Office 2016 (plus unlimited to mobile devices)

The Risks

- Custom solutions
 - Must develop within Microsoft's parameters. And even those tend to change.
 - Example: Custom javascript and CSS branding not supported in modern doc library, list, and page experiences (and haven't been for months) <http://bit.ly/1UB2bqU>
- Keeping up with changes
 - You have to stay on top of various information resources, including the Office blog, Twitter, Microsoft Tech Community, and SharePoint events, to stay in the know.
 - Microsoft Office blog: <https://blogs.office.com/office365updates/>
 - Microsoft Tech Community: <http://techcommunity.microsoft.com/>
 - The change management of rolling out updates is absolutely critical
- Supporting more systems
 - Out of the box, your tenant comes with Mail, Calendar, People, Tasks (so, Outlook and Exchange Online), SharePoint, SharePoint Newsfeed, OneDrive for Business, Delve, Word Online, Excel Online, PowerPoint Online, OneNote Online, Sway, Yammer, Planner, Dynamics 365, PowerApps, Flow, and the Office Store
 - *That's a lot of stuff*
- Performance may be slower
 - On-prem systems will likely be faster
 - Do some testing before making the move
- External sharing is really confusing
 - This is worthy of a separate session
 - See me
- Security
 - "I don't trust the cloud": You're already probably using some cloud services, especially if they're through shadow IT methods. Popular examples include ADP, Box, Concur, Dropbox, Evernote, Google Apps, Hootsuite, MailChimp, Microsoft Dynamics CRM, Salesforce, and Slack.
 - "We won't own the data": False. You own your data.
<http://tinyurl.com/Top100365SecQs>

- “Microsoft will data-mine and advertise to us”: False. They won’t.
<http://tinyurl.com/Top100365SecQs>
- “They can access our stuff”
 - Yeah, they kinda-sorta can, but it would be a huge breach of contract.
 - Except for secret government requests. More here:
<http://bit.ly/2f6dESP>
 - 35,572 law enforcement requests in Q1/Q2 2016; only 2.5% were granted
 - 0-499 FISA/NSL requests over 17,500-17,999 accounts in Q1/Q2 2016
 - Microsoft is suing the US Government over the FISA/NSL issue
 - You have a lot of reading to do, so read the links below and include your legal counsel in the review
- Resources:
 - Microsoft Office 365 Trust Center <http://bit.ly/2g33leU>
 - Office 365 Security Overview from Office blog
<http://bit.ly/1UVOpRC>
 - “Who can access your data and on what terms” blog post
<http://bit.ly/2fqV9ag>
 - Office 365 Lockbox <http://bit.ly/1fRhGtM>
 - US National Security Orders Report for O365
<http://bit.ly/2ge60VZ>
- Keep in mind Microsoft moved 98% of its SharePoint system into SharePoint Online. Read their white paper, it’s pretty thorough:
<http://bit.ly/2ge1sim>

Lessons Learned

- General IT
 - Know special character limitations
<http://tinyurl.com/SPFileTypeLimits>
 - Checked out files will get left behind
 - Terminated users likely need to be replaced by a dummy account
 - Restorations are by site collection <http://bit.ly/2fRahOt>
 - Wow, do things change fast
 - Office 365 Groups and Planner require Exchange Online mailboxes

- Can't remove apps from the app launcher (so Yammer, Planner are available without limitation, if your license allows it, even if you're not ready)
- Can't add new apps/links to app launcher globally
<http://bit.ly/2gtyvw6>
- Sharegate-specific
 - Can't migrate SharePoint Newsfeed posts <http://bit.ly/2ggVj55>
 - Blog post item numbers can change during migration (will kill internal links)
 - Alerts don't migrate <http://bit.ly/2gkdpBj>
 - Incremental migration glitch: If files are deleted between initial migration and increment, they won't be deleted in the destination
 - OneNote files are migrated as folders <http://bit.ly/2g3kIMz>
 - Recurring calendar events: if one instance is different, it won't migrate <http://bit.ly/2gfFOqI>
- General user
 - Logging is in now a must. Have to go through the O365 login-screen
 - Can't redirect sites automatically (nor My Sites to Delve)
 - SMS alerts aren't supported in SPO, even though they show up as an option <http://bit.ly/2ggUVn9>
- Change management and communication aren't part of the process. They *are* the process.
- Exchange Online mailboxes are required to use Office 365 Groups and Planner
- We went from four full-time people supporting SP on-prem to two: one knowledge manager and one admin/dev

Bonus: Check out the infographics at <http://icansharepoint.com/category/infographics/>, including this one on how to search: <http://tinyurl.com/HowtoSPSearch>

How to Search in SharePoint
An everyday user's guide to smart searches in SharePoint 2013, 2016, & Online

SharePoint Office 365
at @icansharepoint i@graphic

WHAT YOU WANT ?

"I'm looking for the new HR benefits overview. It's a PDF file posted by a woman in human resources with the last name of **Matthew** or **Matthews**—I can't remember which—that features the words **"benefits"** and **"insurance"** a lot. Oh, and I want the current version, so **don't give me the 2015 copy.**"

HOW TO SEARCH IT

Use quotation marks to find files with the exact phrase "human resources", not the separate words.

Use - to exclude any results that contain "2015".

Return only files that were created or modified by anyone whose first or last name begins with "matt".

"human resources" benefits OR insurance -2015 filetype:pdf author:matt*

Search text is limited to 2048 characters, including spaces.

Use "OR" to find results that include "benefits", "insurance", or both.

Return only PDF documents in my results.

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