THE SURVIVAL GUIDE FOR
MIGRATING TO AND ADOPTING SHAREPOINT ONLINE

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INTRODUCTION

Microsoft SharePoint is the dominant platform in the market for document management, intranet, collaboration and internal portals.

Yet since originally introducing its cloud-based version, SharePoint online, enterprise adoption of its cloud-based platform has had mixed results. According to a Forrester report released at the end of 2013, faced with the choice of SharePoint's on-premise version or the online version, 66% of respondents — 158 IT decision makers — had plans to deploy SharePoint Server 2013 over the following 12 months, while only 28% choosing SharePoint Online or Office 365.

Of course, SharePoint Online's potential value to enterprises is very enticing: reduced costs, more rapid and less burdensome implementation, automatic upgrades, and more. Yet several barriers also remain.

Migrating to SharePoint Online, either from the on-premise version or from an alternative platform is filled with risks, including the challenge of keeping content organized during the migration process, loss of metadata, storage challenges, and – of course – security.

Successful user adoption is critical to a SharePoint environment, especially if you are looking to use SharePoint Online as a collaboration platform. Yet employees have confidence in the application's usability, access to content, easy navigation and more. Gartner Research has pointed out that employees often resist software adoption because they focus on the challenge of learning new technology, rather than on the benefits of the new system. In general, they are searching for the value it will bring them without the headache.

It is quite possible – and not that difficult - to overcome these challenges.

This white paper will examine some of the common challenges associated with enterprise adoption of SharePoint Online and suggest ways to overcome them, in order to make the transition as smooth as possible, and to get the most value from the platform.

SharePoint

TOP 5 CHALLENGES IN MIGRATING TO SHAREPOINT ONLINE

The path along which you traverse while migrating to SharePoint Online may not be as smooth as you think it to be – there are some "bumps" along the way. In this chapter, we look at some fairly common challenges you are likely to face while migrating to SharePoint Online.

1. DISORGANIZED INFORMATION

A major challenge – which has NOTHING to do with the framework itself but rather a lack of organization on our own part, is information which is disorganized. This invariably proves to be one of the most critical challenges while migrating to SharePoint Online.

And the solution – as would be obvious to you is to ensure that your information remains as organized as possible. So whether we are talking about:

- The sites themselves
- Their respective libraries
- Lists within these sites
- Content types such as documents, images, spreadsheets, databases, etc.
- Content layout such as in stacks, columns, etc.

All have to be properly organized. Remember that when you do so, migration becomes a breeze, and when you don't it becomes a very big challenge.

A term that we will stress here is *pre-migration analysis* – you must spend adequate time on this if you are to get your migration right.

2. STORAGE CHALLENGES

A second challenge that is faced all too often is with regard to storage of data – there may be less or more space available (more is of course not a problem per se but you need to organize it accordingly).

The solution to this challenge lies in ensuring that you double check on storage availability and amply provide for it beforehand, before you commence with the migration process.

Remember that this is as much a consideration of the pre-migration analysis process we mentioned in the previous point, as here.

3. BULK MIGRATION

Bulk migration is often a challenge when migrating to SharePoint Online; files may get corrupted or may not end up in the place you intended them to go.

Herein there is no quick fix per se, yet with adequate planning as well as the deployment of third party tools which make the migration process easier, you can certainly have more files migrating together than otherwise. This is especially true for similar file types, though it is just as true that similar file types may not necessarily be intended for the same location…you don't always have images together and documents together in separate locations – they may all very well co-exist.

So as we mentioned, using third party tools which are intuitive and can easily determine the way in which content is to be laid out when migrated and can certainly make a big difference.

4. LOSS OF METADATA

The probable loss of metadata is certainly a major challenge when we talk about migration to SharePoint Online. At the same time, this challenge can be overcome by having a clear "inventory" of your content before you begin the migration process and also have it well organized say in terms of content types.

Another tip would be to continuously add metadata to content as you migrate – this will definitely go a long way in keeping it preserved.

5. SECURITY

Security is often a challenge when migrating to SharePoint Online, particularly since at a local level, when you have your content say in the in-house location, you also have your own set of security tools at your disposal; once you take things to the next level onto the cloud, you may not have the kind of security that you had previously.

At the same time, remember that this challenge is more about perception than reality – more often than not, the cloud is just as secure and impermeable, perhaps more so, than the security you have at your disposal currently. The key is to double check on this and work accordingly wherein you ensure security of your content.

For a bit more information on the challenges related to SharePoint Online migration, see this infographic for 10 reasons why it might fail.

SIX DATA-BACKED TIPS TO MAKE USERS LOVE SHAREPOINT ONLINE

It can be very difficult to get users to buy-in on SharePoint for a number of reasons. For starters, not very many of them are familiar with the platform, even if it is made by Microsoft.

Gartner analyst, Mark Gilbert, writes that often "end users rarely love the platform, but at best accept it as something they need to use".

At the same time, it is its exceptional data-driven proficiencies that have driven preference for SharePoint to all new levels. Accordingly, in this chapter, we focus on six data-backed tips which we are sure will compel users to heighten their love for SharePoint Online even further.

1. SEAMLESS PIECE-BY-PIECE DATA MIGRATION

Given our love for SharePoint, it is also a certainty that there is a strong preference to keep up with its latest and best version. For instance, if you are on SharePoint 2007, there would be a strong urge to migrate to SharePoint 2010 or to even more recent versions such as SharePoint 2013. Now amidst this migration process, trying to go through with things in one go can be daunting for many reasons – the time involved, the duration for which data may have to be offline, and so on. For this reason, our first tip, as backed by industry expert and VP of Product Marketing at AvePoint, Mary Leigh Mackie, would be to take the piecemeal route for seamless migration to advanced SharePoint versions.

In Mackie's words: "Environments and databases should be migrated granularly in order to aid seamless crossover to a 2010 environment, and third-party solutions can enable IT teams to complete this process according to business need, ensuring the most critical information is available to users quickly without disrupting workflow."

2. INTEGRATING WITH OUTLOOK

If you're forecasting, a great tip for synchronization would be to integrate SharePoint with Outlook as industry experts like Scinaptic Communications have asserted. The whole process is really simple where you start by going to the SharePoint site where documents are actually held, going to the Actions tab, and then simply choosing the Connect to Outlook option – it really is as simple as that!

The advantage here is that the latest forecast spreadsheet will always be a simple 'Send & Receive' away. Further, with SharePoint Online, i.e. the cloud-based version becoming the norm for a vast majority of industry professionals, syncing or integrating with Outlook becomes absolutely vital.

3. SUB-SITES FOR SSRS REPORTS

Across pretty much all Microsoft BI solutions – notwithstanding a variety of reporting technologies on offer, you are quite likely to come across SSRS or SQL Server Reporting Service, with SharePoint being no exception.

Now, when it comes to these reports, a valuable tip would be to put them up in sub-sites as opposed to one gigantic report that appears right at the top of your site, an assertion backed by Advanced Analytics, Technology Solutions & Enablement expert Ted Nubel. The reason? Well, there are many. For starters, preventing unauthorized access to sensitive data which may simply not be anyone else's business! To give you an example, critical financial data need not be revealed to all personnel, even if they are part of the same organization. Further, in many situations, it is simply a case of information overload which you would like to avoid. For instance, one particular sub-unit of a business – in a completely different niche, may not have anything to do whatsoever with another sub-unit that is completely distinct. In all such cases, it makes perfect sense to have different SSRS reports for sub-sites – data management will be that much simpler!

4. ONLINE PROCESS GUIDANCE WHEN IT IS NEEDED – PERFORMANCE SUPPORT

While it's tempting to just wipe your hands clean of the training process after it's been completed, it is your responsibility to make sure that learning never stops. There is a lot to SharePoint, and it won't be easy to master it all after a few training sessions. Look at how your employees are performing and make sure that they are getting the support to keep learning and growing as a user to make them the best additions to your team. Utilizing an "in-the-moment" performance support systems like WalkMe goes a long way in ensuring that SharePoint users have access to the guidance they need, at the moment they need it, in order to ensure high productivity and performance.

This in turn is made easier in today's day and age, particularly when you have resources like YouTube readily available, with a plethora of tutorials, guides, etc. on so many different realms of SharePoint. Also bear in mind that as SharePoint Online becomes the go to resource for industry professionals, the likelihood of them seeking out online process guidance will increase incrementally, which is why we stress on this aspect so much.
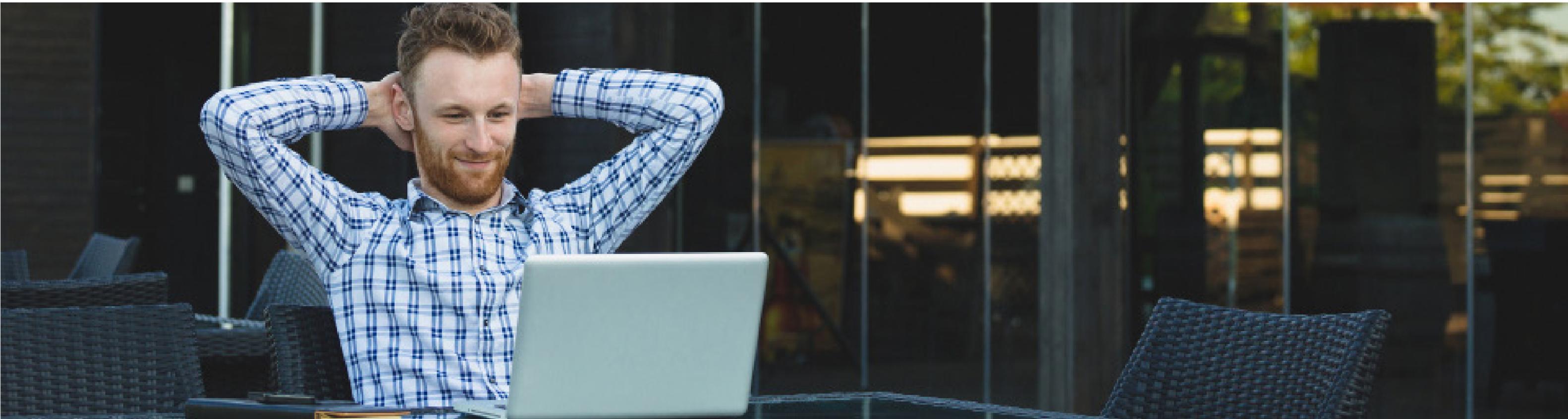
5. SETTING UP AUTOMATED ALERTS

An invaluable tip for managing SharePoint sites particularly recommended by __, head of 82 Ventures, would be to setup alerts about changes. These are typically alerts which very clearly specify the changes made. That way, you don't need to go back and cross-check, maybe go through each and every element / aspect of the site, before you even know where the change has been made and why – undoubtedly, some serious time to be saved here!

This tip becomes all the more pertinent in the case of SharePoint 2010 and beyond, given its flexibility to send out email or text message alerts so that even while you are on the go, you can be alerted about changes made. It is also invaluable in the context of things moving to the cloud wherein SharePoint Online is becoming the norm, whereby automated alerts prove all the more beneficial.

6. ADDING ADDITIONAL COLUMNS INCLUDING FOR METADATA

Jonathan Hassell goes on to assert that the extremely pliable nature of SharePoint implies you can easily add additional columns to it, say for tracking additional information as well as for incorporating a drop-down list you may not have thought about previously.

Moreover, such columns prove absolutely priceless when you are looking to add metadata to your SharePoint, which in turn makes information searching and / or categorization that much easier and simpler.

1. WALKME

CIO has touted WalkMe as "Among 8 Web Apps That Will Change Your Business", definitely with very good reason.

WalkMe is all about simplifying the SharePoint experience, for which it really leaves no stone unturned, including SharePoint Online migration.

One of the foremost advantages of WalkMe lies in its simplistic interface that allows relative newbies to also use the app with ease. Further, WalkMe helps to provide just-in-time performance support to SharePoint users, thereby shortening the learning curve with less time spent on gaining proficiency in it. Users will have a higher level of confidence in using the platform, not having to focus on how to do what they want all the time.

2. DOCAVE

DocAve from AvePoint is another tool that will make migrating to SharePoint Online effortless.

In DocAve's case, a major advantage is the ease with which it allows migration to take place. Typically, pre-migration planning in case of SharePoint migration has to be nothing short of phenomenal with a lot of things to think through before one can commence with migration. But with DocAve from AvePoint, even with relatively less planning, one can go ahead with the migration with ease.

3. CONTENT MATRIX

Content Matrix from Metalogix has consistently proven to be an excellent tool when it comes to effortless migration to SharePoint Online.
Akin to WalkMe and DocAve, Content Matrix is easy to learn and implement. So there is very little time and effort that you will have to invest in actually learning the ropes of the app...within a matter of minutes you will be good to go.

Further, there is ample support available from Content Matrix as far as planning for migration is concerned, particularly when combined with its proprietary Migration Expert tool.

4. TZUNAMI

When it comes to easy migration to SharePoint Online, yet another name that comes to mind is Tzunami. In Tzunami's case, both migration and consolidation of content into SharePoint Online prove to be completely effortless. Moreover, it has a variety of sub-tools / sub-capabilities within its broad migratory tool, such as Exchange Migration, Aqualogic Migration, DocuShare Migration, and LiveLink Migration among others that together make the whole effort of migrating to SharePoint Online really very easy.

5. METAVIS MIGRATION SUITE

MetaVis Technologies offers its MetaVis Migration Suite which has a variety of features that make migration to SharePoint Online fairly effortless.
No matter what form or type of content it may be, including sites, lists, workflows or metadata, MetaVis Migration Suite makes things quite easy. Moreover, analysis proves really easy as well, both prior to and after migration.

As mentioned earlier, SaaS conversions reach their full potential only when the owner understands each step of the conversion funnel and approaches users in a smart way. By following the above steps you ensure that the user's needs are correctly identified and resolved, which will keep them coming back to your product every time. Also keep in mind that a satisfied customer will most likely recommend your product to all its friends, so your user database will soon reach new values.

Are there still variables involved? Yes. Is it smart as a general rule to expect the unexpected? surely. Yet I think that these tips give clear guidelines in helping to make the conversion process smoother and more successful. If I had to sum it up, I would say, try in every step of the way to put yourself in the potential/existing customer's shoes. Understand his needs, fears and attractions. And then deliver the goods. Good luck! The checklist below will certainly prove worth its while when it comes to successful SharePoint Online adoption.

⊘ MIGRATE IN PARTS

The piecemeal route to data migration, as stressed in Chapter 2, usually proves better as opposed to moving a lot of data together – keeping this fact in mind will help you with successful SharePoint Online adoption.

⊘ USE THIRD PARTY TOOLS

Using a third party tool like WalkMe is never a bad idea – refer to the list of tools in the previous section on effortless SharePoint Online migration.

⊘ PLAN YOUR MIGRATION

Again, as stressed previously in this paper, it is important that you plan your migration in advance well; remember that this will go a LONG way in ensuring successful SharePoint Online adoption.

⊘ CAPITALIZE ON ONLINE RESOURCES

Make the most of online resources – however experienced you may be, there is every chance that you are not quite up-to-date on the latest developments as far as SharePoint Online adoption is concerned. The same maybe true in case of your trusted developer / IT department. Therefore, always make some effort on looking up online for latest trends, developments, tools, etc. prior to SharePoint Online adoption.

⊘ DON'T FORGET METADATA

Do not ignore the importance of metadata – metadata proves invaluable when it comes to organizing and categorizing your content, which in turn will prove useful not only for you but for everyone else concerned.

⊘ SET UP ALERTS

Alerts prove invaluable whenever you need to stay updated on the state of your content, particularly if any change is being made to it, so make sure you set them up.

WalkMe provides a cloud-based platform designed to help SharePoint Online managers to guide and engage employees through any online experience. WalkMe simplifies SharePoint usage, in providing direct step-by-step guidance at the moment of need, so that users can work efficiently and successfully. WalkMe removes the barriers of entry from other systems, smooths the migration from on-premise versions of SharePoint to SharePoint Online, and increases user productivity while lowering helpdesk requests, and reducing onboarding and training time and costs.

Through a series of interactive tip balloons overlaid on the screen, tasks are broken down into short, step-by-step guided instructions, which help users act, react and progress during their software usage.

As a result, both during the initial SharePoint orientation process and beyond, managers can empower their users so they no longer need to focus on the technical aspects of operating the software, freeing them to become more productive and avoid errors through even the most complex processes.

WalkMe also removes the barriers of entry for employees using other systems by easing employee agony over changes in their daily routine and cuts the learning curve for new SharePoint users.