



SharePoint Surgery

Migration Strategies



Richard Poole

CTO EMEA

✉ richardp@harmon.ie

🐦 @rtpoole

in <https://uk.linkedin.com/in/richard-poole-55a572>

What are the challenges?

- How do you migrate terabytes of content to SharePoint?
- How do you classify the content so you find it later?
- How do you get workers to change their habits to use SharePoint?
- How do you deal with multiple content repositories?
- How do users cope with changes to SharePoint?

A blurred background image showing several hands in business attire interacting with a laptop on a desk. The scene is brightly lit, creating a professional and collaborative atmosphere.

Data migration

Lift and Load Migration

- Massive task – requires lots of resources and time
- Only the owners of data really know it's value
- Very costly process
- “Junk in → Junk out” – you may end up migrating a lot of unnecessary data

Selective Migration

1. Notify workers they have 3 months to move all their important content
2. Drag and drop of documents from shared drives to SharePoint within Outlook.
3. Turn shared drives to 'read only' mode for another x months
4. Archive shared drives for a requisite period of time

Canada Post saved between \$3-4M by using
harmon.ie's selective migration method

<https://harmon.ie/case-studies/canada-post>

A background image showing a person's hands in a light blue shirt working on a laptop. The hands are positioned over the keyboard and trackpad area. The image is slightly blurred and has a soft, ethereal quality. A dark grey horizontal band is overlaid across the middle of the image, containing the title text.

Moving from folders to metadata

Data organized by folders

- People have been working with folders for years and years
- Users are familiar with folders they use and data they have stored
- Difficult to find content
- Lots of potential duplication
- Only folder names and file names are used to describe a document

Classification using SharePoint Metadata

- Prompt for required metadata during capture
- Use defaults where possible
- Bulk capture documents and folders – assign metadata for multiple files
- Create views grouped by metadata
- Drag and drop document on a grouped view to assign metadata



Focus on user experience

User Experience

The screenshot illustrates a user's desktop environment, showcasing a multi-tabbed web browser and a Microsoft Teams chat window. The browser tabs include 'Shared Documents - All', 'Construction - Legacy pro', 'Files - OneDrive', and 'General (RW Partners) | M'. The active tab displays a Teams chat interface for the 'RW Partners > General' channel. The chat content includes a 'Welcome to the team!' message, a list of 'Favorites' (RW Partners, General, Team 1), and a 'Welcome to the team!' message with the text 'Here are some things to get going...'. Below this, there are two circular icons: one with a book and a pencil, and another with a person and a question mark. Two buttons are visible: 'Create more channels' and 'Open the FAQ'. At the bottom of the chat, there is a text input field with the placeholder 'Start a new conversation. Type @ to mention someone.' and a 'Feedback' button. The desktop background shows a file explorer window with a sidebar containing various folders and files, including 'Recycle Bin' and 'All Site Content'. The overall interface is clean and modern, with a focus on collaboration and productivity.

Don't Try to Change User Behaviour

1. Enable people to continue to work within Outlook, where they already spend their work time.
2. Utilize a new platform and technologies, while providing users with a familiar interface
3. Leverage familiar 'drag and drop' mechanism for migrating and capturing content.
4. Intercept e-mail attachments during Send to automatically upload to SharePoint

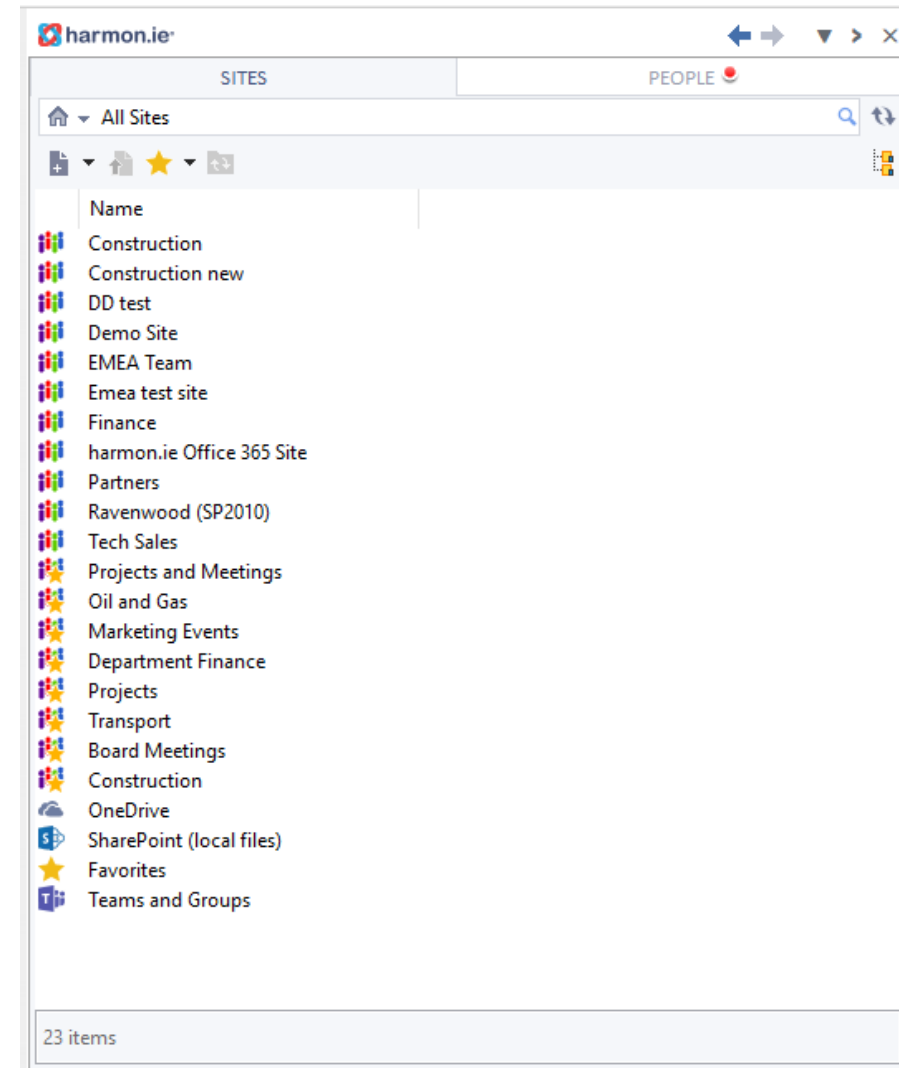
Provide a single familiar user interface

SharePoint Online
sites

Legacy OnPrem
sites

OneDrive

Teams



A blurred background image showing several pairs of hands in business attire interacting with a laptop on a table. The image is out of focus, emphasizing the collaborative work environment.

Demo

Online documentation and videos

- User documentation

<http://harmon.ie/documentation/sharepoint/outlook/welcome>

- Training videos

<http://harmon.ie/SharePoint/Product/TrainingVideos>

Try harmon.ie Enterprise for yourself

<https://harmon.ie/enterprise-trial>

Thank You