



BCNET  
**CONNECT**  
HIGHER ED & RESEARCH TECH SUMMIT

# Upgrade, Migration & Adoption Blues

Stories from the trenches and lessons learnt

Adam Salah

# Agenda

- Ice breaker /Survey
- Terms
- Upgrade
- Migration
- Adoption



# Let us get acquainted

# Ice breaker /Survey

## About Me

About you, by show of hands if you are a:

- Decision maker
- PM
- BA
- IT Pro
- Dev



BCNET  
CONNECT

## Terminology

# Terms: Platform, Upgrade and Migration

Platform; for our purpose here, will generally mean the software stack.

- Linux/Unix/Windows/Web/Productivity tools hosted on Prem/Colo
- SAAS products which for our purposes will be the Platform. Such as M365, Google, ERP..

# Terms: Platform, Upgrade and Migration

**Upgrade**: which applies to the first platform: Deploy a newer version of an existing product

In the case of SAAS, we don't control the when/what of the upgrade.

# Terms: Platform, Upgrade and Migration

**Migration**: Broad move to a new environment, platform and toolset

- Move to a new platform/product (Cloud/OnPrem)
  - \* Oracle to SQL, CRM/SP to Dynamics 365, Slack to Teams..
- Move content from the old platform
- Move users to the new platform



BCNET  
CONNECT

Upgrade

# Upgrade: Categories

## Infrastructure and LoB applications

- Major version upgrade
  - Side by Side
  - In place – Sometimes possible thanks to virtualization of hardware
- Patches and Service packs
  - Direct to mothership
  - SCCM/WSUS on prem test first then deploy

# Upgrade: Categories (Continued)

## Client OS and tools

- Major version upgrade
  - Usually involves hardware refresh
- Patches and Service packs
  - Is it going to catch me during this talk?
  - Managed or unmanaged

# Upgrade: Why, by whom

- Management
  - Planning/Fiscal cycle
  - “Other” reasons such as security threats
- Vendor:
  - Promotion
  - End of Support
- !More??

# Upgrade: SharePoint

- SP 2007 → 2010 → 2013 → 2016
- 2019/Subscription edition → Steppingstone to SPO
- In-place Upgrade → only managed to do it once.  
Client installed 2013 on brand new VMs and decided to upgrade to 2016.
- Side by side upgrade, most common and recommended

# Upgrade: SharePoint

- 2007 → 2016

## Challenges:

- No direct path to upgrade
- System architecture has substantially changed
- Not many tools around that support older versions (07/10)
- MS Support or lack thereof for the product
- Client tools compatibility, Some orgs still have Office 2010, IE.

# Upgrade: SharePoint

- 2007 → 2016

## Challenges:

- Lack of skills
- 2019/Subscription edition
- LoB integration issues
  - SSRS integrated mode
  - PowerPivot
- 2016 → 2016
  - AWS/Azure..
  - Driven by products such DocAve or infrastructure changes such as A/D domain change

# Upgrade: SharePoint

- 2016 → 2016

Challenges:

- DR setup. Cluster awareness and auto failover

- Skill sets

→2019/Subscription edition

- LoB integration issues

- SSRS integrated mode

- PowerPivot



BCNET  
CONNECT

Migration

# Migration: On prem

Migration: Broad move to a new environment, platform and toolset

- Move to a new platform/product (Cloud/OnPrem)
  - \* Oracle to SQL, CRM/SP to Dynamics 365, Slack to Teams..
- Move content from the old platform
- Move users to the new platform

# Migration: Up to the cloud

Platform setup:

SPO/OneDrive, Teams/Yammer, Power platform and Azure AD

Challenges:

- Where to start? SPO/Teams/Exchange/Office?
  - Help: FAST-Track and Sales partners
- How much is enough? Disk (OD 1 or 5?) , licenses, Tools (Plan for governance)
- Full cloud or Hybrid model?
  - Authentication
  - Content
  - Search
- Government regulations
- Changes to Network access rules

# Migration: Moving content

Move content from the old platform

Tools:

- MS – SP, Azure, Exchange migration aids.
- 3<sup>rd</sup> party: ShareGate, Metalogix, AvePoint DoceAve...
- Custom code (PowerShell)

Challenges:

- PII, privacy and security
- Moving legacy content which is not relevant or very large (media, blobs)
- Flattening the existing structure (Nested subsites)
- New concepts such as Modern pages, Hub sites and Delve
- Custom code and deprecated products (InfoPath, SSRS..)

# Migration: Moving users

## Move users to the new platform

- Sync user profiles from on prem AD to Azure AD
  - Can be all AAD or hybrid
  - Mapping users to M365 groups
- Setup MFA
- Move Mysites content to OneDrive
- Move sites to their respective locations in the new platform
- Challenges:
  - Government regulations
  - Volume of content, relevance and currency
  - Teams vs OD vs SPO and Power platform

# Migration: Moving users

## Move users to the new platform

- Sync user profiles from on prem AD to Azure AD
  - Can be all AAD or hybrid
- Setup MFA
- Move Mysites content to OneDrive
- Move sites to their respective locations in the new platform
- Challenges:
  - Infrastructure policy adjustment
  - Changes to Network access rules
  - Volume of content, relevance and currency



BCNET  
CONNECT

Adoption

# Adoption blues

## Plenty

Generally good but has its own challenges:

- Use diverse client tools leading to helpdesk overload
- Access unsupported features
- Overwhelm the system and support personnel
- Cost creep with new online models

Mitigation:

- Preparation (plan to plan the plan)
- Governance

Little to none

- Communication and training
- Executive support (plan for it and get it)



BCNET  
CONNECT

Care to Connect?

# My Contact details:

Adam Salah (MCT/MCSD/MCSE)

asalah@sfu.ca

[https://twitter.com/adam\\_salah](https://twitter.com/adam_salah)

<https://www.linkedin.com/in/adamsalah/>

<https://twitter.com/YVRSharePoint>

<https://www.facebook.com/vancouver.sharepoint/>