

SharePoint Migration Assessment — Sample Report

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SAMPLE

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SharePoint Migration Assessment — Sample Report

SAMPLE REPORT — Demonstration Data Only. Not Based on a Real Customer Engagement.

Fictional organization: Contoso Manufacturing (demonstration company). All environments, metrics, findings, and decisions in this document are invented illustrations of assessment structure. They do not describe a real customer, a real engagement, or real project results.

About This Sample

This sample shows the structure and depth of a SharePoint migration readiness assessment: what gets inventoried, how findings turn into decisions, and what a migration team receives before execution begins. Real assessments are built from direct discovery of the customer environment; nothing in this document was measured from a production tenant.

Every section that contains fictional environment metrics is marked **Sample Data**.

Executive Summary — Sample Data

Contoso Manufacturing operates a SharePoint Server 2016 farm supporting approximately 1,200 users across three regions. Leadership plans to move collaboration content to SharePoint Online within two quarters. This demonstration assessment reviewed a fictional inventory of 85 sites and approximately 420 GB of content.

Illustrative findings:

- Legacy customizations were identified in roughly one third of active sites, including Script Editor usage, SharePoint Designer workflows, and InfoPath forms.
- Unique permission structures exist at library and folder level and require review before migration; they should not be copied without redesign.
- Obsolete and low-activity sites account for a meaningful share of inventory and are candidates for archive rather than migration.
- SharePoint Designer workflows and InfoPath forms require remediation or modernization; they do not migrate as-is.
- External integrations require dependency testing against the target tenant.
- Migration should proceed in controlled waves, starting with a pilot.
- Validation should compare destination state against recorded source baselines, with business sign-off per wave.

No blockers in this demonstration prevent migration planning from proceeding. Several findings require remediation before their workloads move.

Assessment Scope — Sample Data

In scope for this demonstration:

- SharePoint Server 2016 farm (single farm, two web applications)
- Site collections, sites, libraries, lists, and content volumes
- Permissions, sharing configuration, and external access posture
- Customizations, scripts, solutions, and branding
- Workflows, forms, and scheduled automation
- Integrations, APIs, and service dependencies
- Target architecture direction for SharePoint Online

Out of scope for this demonstration:

- Exchange, Teams, and OneDrive migration planning
- Network remediation and identity migration execution
- Licensing procurement
- End-user training delivery

Environment Overview — Sample Data

Area	Demonstration Value
Source platform	SharePoint Server 2016 (single farm)
Target platform	SharePoint Online (Microsoft 365)
Sites inventoried	85
Document libraries	214
Lists	96
Content volume	Approximately 420 GB
Total users	Approximately 1,200
External users	64 guest accounts under review
Customizations catalogued	47 items
Workflows catalogued	63 workflows
Integrations catalogued	9 dependencies
Business-critical workloads	6 identified

Site and Content Inventory — Sample Data

Category	Sites	Demonstration Treatment
Active, owned collaboration sites	34	Migrate in planned waves
Low-activity sites	22	Review with owners; migrate or archive
Archive candidates	14	Archive; exclude from migration scope
Business-critical sites	6	Dedicated waves with extended validation
Sites requiring further review	9	Investigate ownership and dependencies

Inventory findings support migration decisions: active owned content migrates, obsolete content is archived rather than moved, and unclear ownership is resolved before wave planning instead of during execution.

Permissions and External Sharing — Sample Data

Area	Demonstration Finding
Inherited permissions	61% of libraries inherit from the parent site
Unique permissions	83 libraries and 240 folders break inheritance
Direct user permissions	312 individual grants identified for cleanup
SharePoint groups	145 groups; 18 with no active owner
Microsoft 365 groups	To be established in the target design
External users	64 guests; 21 with no activity in 12 months
Anonymous / Anyone links	46 links flagged for owner review
Orphaned accounts	37 accounts tied to departed staff
Elevated access	12 site-collection administrators pending recertification

Permissions require validation before and after migration. Identity mapping, group redesign, and external-sharing policy differ between source and target, so access should be remodeled against the target architecture and re-verified after each wave — not copied verbatim.

Information Architecture — Sample Data

The demonstration source uses nested subsites up to five levels deep with folder hierarchies exceeding ten levels in three libraries. The recommended direction is a flat modern structure: hub-associated communication and team sites, metadata-driven libraries, and hub navigation replacing subsite trees.

Current Pattern	Demonstration Direction
Deep subsite hierarchies	Flat sites joined to three hubs
Folder-based organization	Metadata columns with filtered views
Duplicated department libraries	Consolidated libraries with content types
Ad-hoc site creation	Governed provisioning with ownership records

Customization Assessment — Sample Data

Customization	Business Purpose	Current Technology	Target Compatibility	Criticality	Migration Impact	Recommended Decision	Potential Target
Regional KPI dashboard	Operations reporting	Script Editor + JavaScript	Not supported as-is	High	High	Modernize	SPFx
HR policy banners	Announcements	Content Editor	Not supported as-is	Medium	Low	Replace	Out-of-box SharePoint
Project list formatting	Status highlighting	JSLink	Not supported as-is	Medium	Low	Replace	List formatting (JSON)
Expense approval form	Finance process	InfoPath	Not supported	High	High	Rebuild	Power Apps + Power Automate
Procurement workflow UI	Approvals	SharePoint Add-in	Retiring pattern	High	High	Modernize	Power Apps
Site theming	Branding	Custom master page	Not supported	Low	Medium	Retire	Out-of-box themes
Document ID generator	Records support	Farm solution	Not transferable	Medium	Medium	Rebuild	Microsoft Graph / Azure
Team roster web part	Directory display	SPFx (existing)	Compatible after testing	Medium	Low	Retain	SPFx (target version)
Legacy survey branding	Campaign styling	Custom CSS	Partial	Low	Low	Retire	Out-of-box SharePoint
Vendor portal widget	Supplier updates	Custom web part	Requires review	Medium	Medium	Investigate	Further assessment

SPFx is recommended only where custom SharePoint development remains justified after retirement, replacement, and out-of-box options are ruled out.

Workflow Assessment — Sample Data

Workflow	Platform	Items in Flight	Dependencies	Assessment
Purchase approval	SharePoint Designer 2013	40–60 monthly	Service account, finance list	Requires Modernization
Leave request	SharePoint Designer 2010	100+ monthly	HR list, email	Requires Replacement
Document review	Power Automate	30 monthly	Connections, Teams	Compatible
Expense posting	Nintex-style third-party	200 monthly	ERP connector, credentials	Requires Reconfiguration
Onboarding checklist	Legacy list workflow	15 monthly	Business owner vacant	Retire
Quality audit trail	SharePoint Designer 2013	25 monthly	Audit library, API	Further Investigation

Dependencies recorded per workflow include connections, service accounts, lists, libraries, APIs, credentials, and business owners. Vacant ownership is treated as a migration risk, not a detail.

Integration Assessment — Sample Data

Integration	Type	Demonstration Status
HR directory sync	Scheduled script + service account	Requires credential review
ERP document lookup	External API from workflow	Requires endpoint testing
Finance reporting extract	Microsoft Graph (planned)	Compatible direction
Quality docs archive	Azure storage job	Requires configuration review
Supplier portal feed	External API	Requires authentication review
Search connector (legacy)	Custom connector	Retire with source

Migration planning must account for more than content movement: every integration needs an owner, a target authentication model, and a post-migration test before its dependent workload is signed off.

Migration Complexity Model — Sample Data

Complexity is illustrative, not a proprietary score. Each workload is rated Low, Medium, or High per factor, and the overall rating follows the highest material factor.

Factors: content volume, permissions, customizations, workflows, integrations, business criticality, compliance obligations, external sharing.

Workload	Volume	Permissions	Custom	Workflow	Integration	Criticality	Overall
Policy library	Low	Medium	Low	Low	Low	High	Medium
Finance approvals	Medium	High	High	High	High	High	High
Team collaboration	Low	Low	Low	Low	Low	Low	Low
Records archive	High	Medium	Low	Low	Low	Medium	Medium

Migration Decision Matrix — Sample Data

Workload	Business Value	Complexity	Risk	Decision	Target	Wave
Policy library	High	Medium	Medium	Migrate	SharePoint Online	Wave 1
Finance approvals	High	High	High	Modernize	Power Apps + Automate	Wave 3
Team collaboration	Medium	Low	Low	Migrate	SharePoint Online	Wave 1
Records archive	Medium	Medium	Medium	Archive	Records archive	Wave 0
Legacy surveys	Low	Low	Low	Retire	—	—
KPI dashboard	High	High	Medium	Modernize	SPFx	Wave 3
HR onboarding list	Medium	Medium	Medium	Replace	Out-of-box lists	Wave 2
Vendor widget	Medium	Medium	High	Investigate	TBD	TBD

Migration does not mean moving everything: retire, archive, replace, and modernize decisions in this demonstration remove roughly a third of inventory from the migration scope.

Risk Register — Sample Data

ID	Risk	Likelihood	Impact	Rating	Mitigation	Owner	Status
R-01	Legacy workflow dependency breaks approvals	High	High	High	Modernize before wave; parallel run	Application Owner	Open
R-02	Complex unique permissions delay cutover	High	Medium	High	Remodel permissions in pilot	SharePoint Owner	Open
R-03	Unsupported customization blocks site move	Medium	High	High	Retire/replace per matrix	Migration Lead	Open
R-04	Unreviewed external sharing persists	Medium	Medium	Medium	Owner recertification pre-wave	Security Team	Open
R-05	Large library throttles migration throughput	Medium	Medium	Medium	Split views; staged copy	Migration Lead	Open
R-06	Business-critical integration untested	Medium	High	High	Endpoint testing in Wave 0	Application Owner	Open
R-07	Missing content owner stalls decisions	High	Medium	High	Ownership drive before Wave 1	Business Owner	Open
R-08	Inadequate validation baseline	Medium	High	High	Record baselines in pilot	Migration Lead	Open

Migration Wave Strategy — Sample Data

Example phasing only. Actual wave design depends on assessment findings.

Wave	Scope	Demonstration Content
Wave 0 — Pilot	Representative slice	One department site, one approval workflow, baseline recording
Wave 1 — Low complexity	Collaboration sites	Team sites with standard permissions
Wave 2 — Departmental	Owned workloads	HR, operations libraries with metadata mapping
Wave 3 — Complex	Customized workloads	Finance approvals, KPI dashboard modernization
Wave 4 — Business-critical	Regulated workloads	Records, audit-bound content with extended validation

Entry criteria per wave: ownership confirmed, remediation complete, baseline recorded, rollback path agreed.

Validation Strategy — Sample Data

Migration completion is not equivalent to migration validation.

Area	Demonstration Check
Content	Item counts and storage reconciled per library
Metadata	Required columns populated; mappings verified
Permissions	Effective access sampled against target design
Versions	Version policy and history conformance
Navigation	Hub links, menus, and web parts resolve
Search	Key content discoverable under expected queries
Workflows	Flows trigger and complete on target
Integrations	Endpoints respond under target identity
Customizations	Retained components behave as baselined
External sharing	Links and guests match approved posture
Business acceptance	Owners sign off per wave

Flow: source baseline, migration, destination scan, technical validation, exception handling, business sign-off.

Recommended Next Steps — Sample Data

1. Confirm migration scope and archive/retire decisions with owners.
2. Resolve high-rated risks R-01, R-02, R-03, and R-06.
3. Finalize migration decisions for Investigate items.
4. Modernize incompatible dependencies before their waves.
5. Establish source baselines during the pilot.
6. Execute the pilot wave.
7. Validate the pilot against baselines.
8. Refine the migration runbook from pilot lessons.
9. Execute production waves with per-wave validation.
10. Obtain business sign-off before closing each wave.

These steps describe an approach. They promise no outcomes, timelines, or results.

Assumptions and Limitations

- All data in this report is fictional and created to demonstrate structure.
- Findings assume the demonstration inventory; real environments differ.
- Effort, duration, and cost are intentionally excluded.
- Tool behavior and platform limits change; verify against current Microsoft documentation during real planning.
- This sample is not a case study and describes no real engagement.

Planning a SharePoint Migration?

A structured readiness assessment can help identify migration scope, dependencies, modernization requirements, and validation needs before production migration begins.

Book a SharePoint Migration Assessment: <https://nextm365.com/services/sharepoint-migration-assessment>