



### Moving data between SharePoint 2013 on-premise and SharePoint Online - Technical Guidance Document

What does this guide cover?	Various methods available to transfer data from SharePoint on- premise to SharePoint Online		
Who is it aimed at?	SCAs (Site Collection Administrators) in SharePoint on-premise, SNAs (Site Network Administrators) in SharePoint Online and Site Owners		

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- 1. <u>Manually downloading / uploading documents from SharePoint 2013 to</u> <u>SharePoint Online</u>
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#### Lists:

- 1. <u>Creating a List Template and exporting / re-importing into SharePoint Online</u> (Site Collection Admins Only)
- 2. Exporting a list as Excel data then creating a list from Excel in SharePoint Online

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#### Overview

Although the SharePoint Online project is not a migration project, users in colleges and departments will undoubtedly want to move existing content from SharePoint 2013 onpremise to SharePoint Online (SPO).

This document aims to show various methods available to transfer content from one service to another. In all methods we would advise users to use "Copy and paste: to move items rather than just dragging and dropping, to avoid any potential data or content loss during these operations. We would also strongly advise users NOT to try and move thousands of documents or gigantic lists (particularly lists that contain over 5000 items due to list view thresholds). If you tackle your content gradually in manageable chunks, then you'll find the experience far easier and more reliable.

**Please consider** the points on staging areas under <u>Other notes and support points b</u>efore you begin moving content, and ensure you remove this content after you have finished.

### **Documents and Folders**

This section of the document deals with copying documents and folders from SharePoint 2013 to SharePoint Online. There are 5 recommended methods for achieving this:

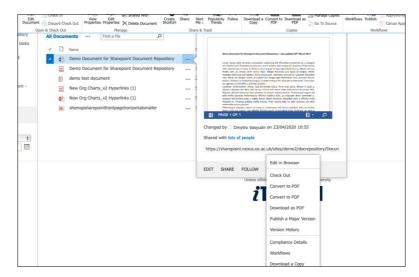
## 1) Manually Downloading documents from SharePoint 2013 then uploading to SharePoint Online.

This is the easiest / most obvious method of moving content.

1) Navigate to the SOURCE (SharePoint 2013) library where your documents are:

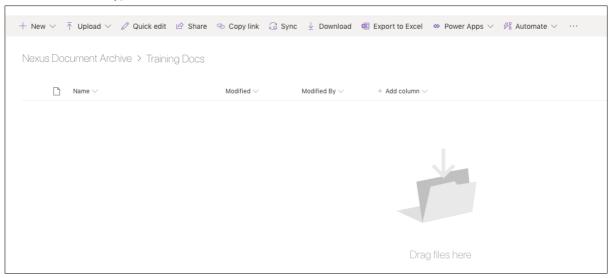
Documents							
	+ new document or drag files here						
sitory	All Documents ···· Find a file $\wp$						
tasks	✓ □ Name		Modified				
d	Demo Document for Sharepoint Document Repository	•••	23 April				
	Demo Document for Sharepoint Document Repository		16 March, 2018				
	🗒 demo text document		23 March, 2017				
ent -	New Org Charts_v2 Hyperlinks (1)		5 February				
	New Org Charts_v2 Hyperlinks (1)	•••	5 February				
	sitemapsharepointfrontpagehorizontalsmaller	•••	12 February, 2018				

2) Click on the ... (three ellipses) next to your required document and you'll see the options window:

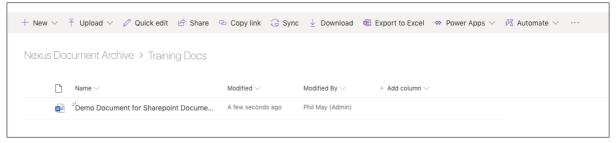


At the bottom of the menu you will see the "Download a Copy" option. Select this to download the document to your default download location.

3) Now navigate to the DESTINATION (your SharePoint Online Site / Destination Document Library):



Either click the "Upload" link in your document library tool bar to choose where to upload your document from, or just drag / drop the document directly into the library window. Your document will appear in its new location:



Pros: Most reliable method of moving documents Keeps a copy in both places (just in case) Uses standard SharePoint User Interface so should work in any browser or client environment Can be done by anyone with read / write access to a site
Cons: Can only do this one document at a time (can't group select multiple documents at once) Cannot do this for folders Does not preserve document metadata (such as created by, created on date, modified by, modified on date Does not preserve document version history Does not remove original so difficult to keep track of what has yet to be moved
You must remember to delete the downloaded files on your machine after you have finished

#### 2) Using "Open in Explorer" in SharePoint 2013 then moving items into SharePoint Online

Again, this method makes the assumption that you're using a supported operating system and browser.

This method was tested and conducted on a Windows 10 machine running Microsoft Edge, but opening the site in Internet Explorer Mode - there are plenty of <u>help pages</u> that detail how to do this

1) Navigate to your SOURCE site / library but make sure you do so in Internet Explorer, or in IE mode in Edge as detailed above.

Documents							
	new document or drag files here						
sitory	All Documents ··· Find a file						
tasks	✓ 🗋 Name		Modified				
b	Demo Document for Sharepoint Document Repository		23 April				
	Demo Document for Sharepoint Document Repository		16 March, 2018				
	demo text document	•••	23 March, 2017				
ent -	New Org Charts_v2 Hyperlinks (1)		5 February				
	New Org Charts_v2 Hyperlinks (1)		5 February				
	sitemapsharepointfrontpagehorizontalsmaller	•••	12 February, 2018				

2) Click on the "Library" tab in your ribbon / toolbar and select the "Open In Internet Explorer" option:

BROWSE FILES LIBRARY			Q	SHARE 🖞	SYNC	
Current View:		<ul> <li>□ E-mail a Link</li></ul>			🙀 🐝	
View Quick Edit View San Current Page	Tags & Notes	RSS Feed	Connect to Connect Outlook Office -	ustomize Library <del>+</del>	Library Settings	
View Format Manage Views	Tags and Notes	Share & Track	Connect & Export		Settings	

(The tiny easily missed icon in the red circle above!)

- 3) Once clicked you may get a login prompt for SharePoint At this point you will need to enter your credentials EXACTLY as follows
  - A) For Username enter ad-oak\yourusername (so that SharePoint knows which domain you're using. If you do not do this, your credentials will not work!)
  - B) For password, just enter your normal password for SharePoint
- 4) Then, you should see your document library appearing in Internet Explorer mode:

📙 🛃 🚽 🖛 🖌 🚽 🖌 Docum	nents				- L	×
File Home Sh	are	View				$\sim$
$\leftarrow \rightarrow \checkmark \uparrow \square \ll$	sites	> demo2 > docrepository > Documents		✓ C Search Do	ocuments	Q
	^	Name	Date modified	Туре	Size	
A Quick access		Demo Document for Sharepoint Docume	23/04/2020 10:55	Office Open XML	27 KB	
🔜 Desktop 🛛 🖈		選 Demo Document for Sharepoint Docume	16/03/2018 14:07	PDF File	200 KB	
👆 Downloads  🖈		demo text document	23/03/2017 12:17	Text Document	1 KB	
🚆 Documents  🖈		👺 New Org Charts_v2 Hyperlinks (1)	05/02/2020 09:28	PDF File	1,277 KB	
📰 Pictures 🛛 🖈		New Org Charts_v2 Hyperlinks (1).pptx	05/02/2020 09:41	PPTX File	233 KB	
👌 Music		sitemapsharepointfrontpagehorizontals	12/02/2018 10:17	PNG File	172 KB	
Videos	~					
6 items						

At this point you have two choices:

- A) Select all your files / folders and then copy / paste them to a local folder on your machine – and use <u>OneDrive Sync</u> to sync these with your SharePoint Online Library
- B) (More dangerous) Navigate to your SharePoint Online site and drag / drop files directly from your Internet Explorer window into your SharePoint Online Document Library (be warned, if anything goes wrong you could potentially lose files using this method so test it on a small group of individual files first, and bear in mind you can only do small operations (100 files or less) using this method.
- 5) Once done, your files will appear in your SharePoint Online library as shown:

$+$ New $\vee$	$ar{\uparrow}$ Upload $\lor$ $\mathscr{O}$ Quick edit $\overleftrightarrow$ Share	🐵 Copy link  Ə Synd	$\pm$ Download	🖷 Export to Excel 🛛 🚸
Nexus Do	cument Archive > Training Docs			
Ľ	Name $\vee$	Modified $\smallsetminus$	Modified By $\smallsetminus$	$+$ Add column $\smallsetminus$
	<sup></sup> Demo Document for Sharepoint Docume	A few seconds ago	Phil May (Admin)	
	<sup></sup> Demo Document for Sharepoint Docume	A few seconds ago	Phil May (Admin)	
	<sup>'</sup> demo text document.txt	A few seconds ago	Phil May (Admin)	
	<sup>l</sup> New Org Charts_v2 Hyperlinks (1).pdf	A few seconds ago	Phil May (Admin)	
2.	<sup>l</sup> New Org Charts_v2 Hyperlinks (1).pptx	A few seconds ago	Phil May (Admin)	
ß	<sup></sup> sitemapsharepointfrontpagehorizontalsm	A few seconds ago	Phil May (Admin)	

# **Pros:** Keeps a copy in both places (assuming you don't delete documents in Explorer mode)

Allows you to move files and folders (up to 100 items at a time) Can be done by anyone with read / write access to both locations

Cons: Requires domain authentication to open libraries in explorer mode (will not work with just your username and password so can be fiddly for some users) Using Explorer Mode can be dangerous if users delete items in Explorer, which will bypass the SharePoint on-premise recycle bin (so never, ever do this!)
Only feasibly works for up to 100 items at a time.
Does not preserve document metadata (Created, Created by, Modified, Modified by etc)

Does not preserve document versions

# You must remember to delete the downloaded files on your machine after you have finished

# 3) Using a WebDAV Connection in SharePoint 2013 then Copying / Pasting into SharePoint Online Libraries

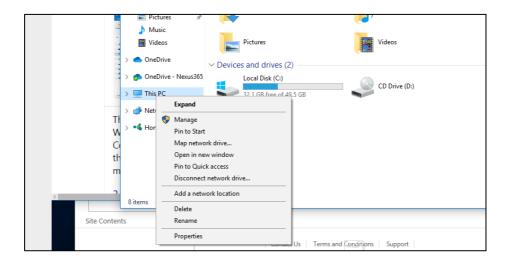
This method does not require Internet Explorer but may require changes to your client machine / environment to facilitate webDAV connections.

#### See this web page for support if you cannot get this method to work for you

The method below was tested on a Windows 10 Machine but should also work on Mac / Linux clients too (just search online for "Setting up Webdav SharePoint 2013 Mac or Linux" and you'll find plenty of help pages discussing the methods there.

For Windows 10:

1) Open File Explorer on your Windows 10 machine and right click the "This PC" icon. Select "Map Network Drive" from the menu shown:



2) You will see this screen:

× sk	🗧 Map N	letwork Drive	×
sł M	What ne	etwork folder would you like to map?	
с +.	Specify th	e drive letter for the connection and the folder that you want to connect to:	
IS	Drive:	Z: ~	
e	Folder:	Browse Example: \\server\share	
D		Example: (Selversinale)	
F		Connect using different credentials	
v			
ne			
		Finish Cancel	

3) Click the bottom link – "Connect to a Web Site that you can use to store your documents and pictures" – This will open up the Network Drive Wizard:

÷	Add Network Location	×
	Welcome to the Add Network Location Wizard	
	This wizard helps you sign up for a service that offers online storage space. You can use this space to store, organize, and share your documents and pictures using only a web browser and Internet connection.	
	You can also use this wizard to create a shortcut to a website, an FTP site, or other network location.	
	Next Cancel	

Click "Next" and you'll see the following screen:

		×
←	Add Network Location	
	Where do you want to create this network location?	
	Choose a custom network location Specify the address of a website, network location, or FTP site.	
	Next Cance	el

4) Click "Next Again and you'll see this prompt screen:

÷	Add Network Location	×
	Specify the location of your website	
	Type the address of the website, FTP site, or network location that this shortcut will open.	
	Internet or network address:	
	✓ Browse	
	<u>View examples</u>	
	Next Cance	ł

5) Here's where things get interesting. The box above needs a URL of your SharePoint Document Library but you need to miss some bits out. So for example, if I wanted to use my demo site's document library location which is: <u>https://sharepoint.nexus.ox.ac.uk/sites/demo2/docrepository/Documents/Forms/Al</u> <u>lltems.aspx</u>

...the actual string I would be copying / pasting into the box in step 4 would be this: <u>https://sharepoint.nexus.ox.ac.uk/sites/demo2/docrepository/Documents</u>

(Basically miss the /forms/allitems.aspx from the end of the URL).

6) Once you've got the correct URL in place, click "next" and you should see the following screen:

		$\times$
←	Add Network Location	
	What do you want to name this location?	
	Create a name for this shortcut that will help you easily identify this network location:	
	https://sharepoint.nexus.ox.ac.uk/sites/demo2/docrepository/Documents.	
	Type a name for this network location: sharepoint.nexus.ox.ac.uk	
	Next Cance	el

7) Give your WebDAV mapping a sensible name and click "Next" again You will then see a summary screen and further options (whether you want to go straight to the mapped library when the wizard has finished).

÷	Add Network Location		~
	Completing the Add Network Location Wizard		
	You have successfully created this network location:		
	A shortcut for this location will appear in Computer.		
	✓ Open this network location when I click Finish.		
		Finish	Cancel

- 8) Once done, you will see your new drive mapping in File Explorer on your Windows machine. You can then upload files from this or drag / drop into SharePoint Online in batches of 100 again, just as with the previous "Open in Explorer" method and with the same recommendation that it's worth setting up OneDrive sync for your mapped drive / location rather than dragging and dropping, to ensure you don't accidentally lose any content.
  - Pros: Keeps a copy in both places (assuming you don't delete documents in explorer mode)
    Allows you to move files and folders (up to 100 items at a time)
    Can be done by anyone with read / write access to both locations
  - Cons: WebDav connections rely entirely on the setup of your client environment and can be fiddly for some users. However, there is plenty of support out there on the internet, just google "Set up WebDAV connection for SharePoint 2013" and you'll find lots of help sites.
    Using WebDAV can be dangerous if users delete items in File Explorer, which will bypass the SharePoint on-premise recycle bin (so never, ever do this! Do all your file management and deletion in SharePoint itself through the UI to ensure the recycle bin is used properly and so you can restore any accidentally deleted items)
    Only feasibly works for up to 100 items at a time.
    Does not preserve document metadata (Created, Created by, Modified, Modified by)
    - Does not preserve document versions

### Lists

SharePoint lists come in all sorts of different configurations, with different levels of customisation. This help document assumes you are using an out of the box SharePoint list with no form customisation, no custom content types, no custom columns or other non-standard list enhancements. It also assumes you're working with lists of less than 5000 items purely because doing anything with larger lists will require you to work on it after 9pm at night when the restrictions on handling large list views is lifted. We cannot alter the threshold for large list management in any way, it's set like this for a reason – to lessen the impact on daily operations for SharePoint.

In this document we will be detailing two methods of extracting a list from SharePoint onpremise and importing it to SharePoint Online. Both methods require at least Site Collection Administrator / Site Administrator rights in SharePoint on-premise and Online respectively.

# Method 1: Creating a List Template in SharePoint On-Premises and exporting it / importing it to SharePoint Online.

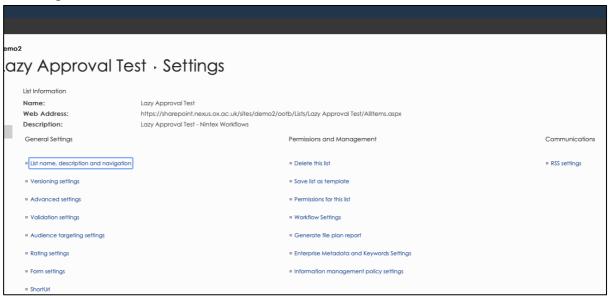
Depending on your site type, most sites will allow exporting of a SharePoint List to the Template Gallery. This method has previously been used to set up list templates so that the same list with the same columns can be used multiple times in each site collection.

However it's also useful as a method of moving a list from on-premises to Online. Here's how:

SharePoint						Newsfeed
BROWSE ITEMS LIST						
View Quick Create	Modify View  Create Column All Items Tags & Navigate Up	E-mail a Alert RSS Link Me + Feed		Image: Second	rkflow tings -	
View Format	Manage Views Tags and Notes	Share & Track Conne	ct & Export	Customize List Settings		
Home	Title	Approval Status	Created	Created By	Modified	Modified By
Notebook	student data example	Approved	09/03/2018 10:37	<ul> <li>Phil May (admin)</li> </ul>	09/03/2018 10:40	<ul> <li>Phil May (admin)</li> </ul>
Documents	testing	Declined	08/03/2018 14:19	Phil May (admin)	08/03/2018 14:21	Phil May (admin)
Recent	sfsdfhbdfjhbdgf	Approved	08/03/2018 10:18	<ul> <li>Phil May (admin)</li> </ul>	08/03/2018 10:21	<ul> <li>Phil May (admin)</li> </ul>
Future Clinic Sessions	s lop	Approved	22/01/2018 09:24	<ul> <li>Phil May (admin)</li> </ul>	22/01/2018 09:25	Phil May (admin)
Survey	pol	Declined	22/01/2018 09:24	<ul> <li>Phil May (admin)</li> </ul>	22/01/2018 09:26	<ul> <li>Phil May (admin)</li> </ul>
Test survey	knoll	Declined	11/12/2017 16:46	<ul> <li>Phil May (admin)</li> </ul>	11/12/2017 16:47	Phil May (admin)
Slot Bookings	alli	Declined	11/12/2017 16:46	<ul> <li>Phil May (admin)</li> </ul>	11/12/2017 16:47	🗆 Phil May (admin)

1) Navigate to your list in SharePoint 2013 (the SOURCE):

2) From the list options ribbon, click on the "List Settings" icon and you will see the following menu:



3) Select the "save list as template" link and you will be taken to a list template screen like this:

ettings · Save (	as Template 🛛	
File Name Enter the name for this template file.		File name:
Name and Description The name and description of this ten	nplate will be displayed on the Create page.	Template name:
to include the items in this list. Includi template.	ou want new lists created from this template ng content can increase the size of your ined in a template. If you have private n is not recommended.	Include Content

Give your template a filename, a template name and a template description. With the last tick box, tick if you want to include content (and your list is less than 5000 items in length / does not contain attachments as a column type).

4) Once you've filled all the boxes in, click OK and you'll see the confirmation screen:



5) At this point you will need to visit the List Template Gallery. Follow the link in the confirmation page – and you will see your list template gallery, looking like this:

D Name	Edit	Modified	Title	Language
committeelinks	<b>I</b>	02/03/2017 15:01	committee links list	English
individualbookinglist	D	20/11/2017 15:16	individualbookinglist	English
Laser Safety Main Reg Table	Ð	24/04/2019 16:04	Laser Safety Main Reg Table	English
LazyApprovalsTemplate		20/07/2020 14:46	Lazy Approvals Template	English
masterroombookingcalendartemplate	Ð	20/11/2017 14:30	masterroombookingcalendartemplate	English
NintexLiveTestingRachelLazenby		03/12/2018 12:42	nintexlivetestingrachellazenby	English
slotbookings		16/11/2017 09:15	slotbookings	English
slotbookingslist	D	16/11/2017 09:18	slotbookingslist	English

6) The "LazyApprovalsTemplate" template is the one we want. Using the ribbon in the template gallery (files), highlight the item you want to download, then select 'download a copy' from the ribbon:

	Check Out	View Properties Properties	<b>Share</b>	Alert Popularity Me - Trends	Download a Copy	Go To Source	Workflows Publish Publish Cancel Approval	Tags & Notes	
Op	en & Check Out	Manage	Sh	nare & Track		Copies	Workflows	Tags and Note	
	Name		Edit	Modified		Title			
	committeelinks			02/03/2017	5:01	committee	links list		
	individualbookinglist			20/11/2017	5:16	individualbo	vidualbookinglist		
	Laser Safety Main	Reg Table		24/04/2019	24/04/2019 16:04 Las		Laser Safety Main Reg Table		
	LazyApprovalsTem	plate 🖽 NEW	D	20/07/2020	4:46	Lazy Appro	Lazy Approvals Template		
C	a masterroombookir	ngcalendartemplate		20/11/2017	L4:30	masterroor	nbookingcalendartemplate		
	NintexLiveTestingR	NintexLiveTestingRachelLazenby		03/12/2018	12:42 nintexlive		exlivetestingrachellazenby		
	slotbookings			16/11/2017 (	9:15	slotbooking	js		
	slotbookingslist			16/11/2017 (	9:18	slotbooking	gslist		

- 7) Once done, you will have a file called (templatename).stp in your default downloads section.
- 8) Now you need to go to your SharePoint Online site. Navigate to your SPO site and click on the cog (Site Settings), then select "Site Information" then from that page "View All Site Settings" which will bring you to your SharePoint Online Site Settings

#### page like this:

Site Settings		
once occurrige		
Users and Permissions	Look and Feel	
People and groups	Title, description, and logo	
Site permissions	Quick launch	
Access requests and invitations	Top link bar	
Site collection administrators Site app permissions	Navigation Elements Change the look	
Site app permissions	change the look	
Web Designer Galleries	Site Actions	
Site columns	Manage site features	
Site content types	Save site as template	
Web parts	Enable search configuration export	
List templates	Reset to site definition	
Master pages	Delete this site	
Themes Solutions		
Composed looks	Site Collection Administration	
composed looks	Recycle bin	
	Search Result Sources	
Site Administration	Search Result Types	
Regional settings	Search Query Rules	
Language settings	Search Schema	
Export Translations	Search Settings	
Import Translations	Search Configuration Import	
Site libraries and lists User alerts	Search Configuration Export Site collection features	
RSS	Site hierarchy	
Sites and workspaces	Site collection audit settings	
Workflow settings	Portal site connection	
Site Closure and Deletion	Content Type Policy Templates	
Term store management	Storage Metrics	
	Site collection app permissions	
Connet	Record declaration settings	
Search	Site Policies	
Result Sources	Content type publishing	
Result Types Query Rules	HTML Field Security SharePoint Designer Settings	
Schema	Site collection health checks	
Search Settings	Site collection upgrade	
Search and offline availability	one conceron apgrade	
Configuration Import		

9) Under the "Web Designer Galleries" section, click on the "List Templates" link to see your SharePoint Online list template gallery, looking a bit like this:

BROWSE	FILES	LIBRARY	(							
New U Document - Do	1 Jpload ocument	New Folder	Edit Document	View Edit Properties Properties	Version History	Share Alert Me +	Download a Copy	Bend To - Manage Copies Co To Source	Workflows         Publish           ∑         Approve/Reject           ∑         Cancel Approval	Tags & Notes
Ne	ew		Open & Check Out	Mai	nage	Share & Track		Copies	Workflows	Tags and Notes
Home Nexus Techr	nical Do	cuments	Name N365 Change Log		Edit	Modified 15/10/2019 1	4:46	Title N365 Cl	hange Log	Language <b>English</b>
Nexus Team Documents			N365 Lab Change	Log	<b>I</b>	15/10/2019 1	5:10	N365 La	ab Change Log	English
OSM / Heat	: Rota 20	20	NexusChangeLog		1	15/10/2019 1	4:31	Nexus C	Change Log	English
Meeting Min	nutes Ro	ta	NexusPatching		<b>I</b>	15/10/2019 1	5:59	Nexus F	Patching	English
Team Meetin	ing Minu	tes	nexusteamcalenda	irnov19		19/11/2019 1	5:14	nexuste	amcalendarnov19	English
Service Man Documents		it	serviceandsandfail	ures	D	15/10/2019 1	5:30	Service	and SAN Failures	English

In the image above I've clicked on the "Files" tab in the ribbon, because the next thing you need to do is to click the "Upload Document" icon in the ribbon – which will show you a screen like this:

2	Add a template		×
	Choose a file	Choose File no file selected	
		✓Overwrite existing files	
		OK Cancel	
_			

10) Select the .STP file you previously created, and tick the 'overwrite existing files' box then click OK. You should get a confirmation screen like this:

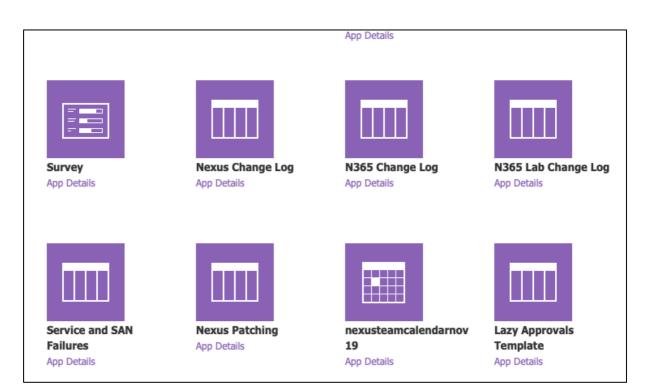
Add a templat	te	×
EDIT		
	A Cut B Copy aste Copy Delete Item	
Commit	Clipboard Actions	
Name *	LazyApprovalsTemplate .stp	
Title	Lazy Approvals Template	
Description	A template filled with lazy approvals	
	20 14:58 by  Phil May (Admin) Save Cancel	

Click "Save" and this will save your exported list template to your new SharePoint Online site's list template gallery:

::: N	lexus36	5												
BROWSE	FILES	LIBRARY	ſ											
New Document	Upload Document	New Folder	Edit	🚡 Check Out 🚡 Check In 😚 Discard Check Out	View Properties	Edit Properties	Version History	Share	Alert Me +	Download a Copy	Bend To - Manage Copies Co To Source	Workflows Publish	Unpublish Approve/Reject Cancel Approval	() Ta N
	New		Oper	n & Check Out		Ma	nage	Share	& Track		Copies	Wor	kflows	Tags a
Home				Name			Ed	it	Modified		Titl	e		
Nexus 7	Technical Do	ocuments	5	LazyApprovalsTem	plate 🛯 NEW				20/07/2020 14:58 La		Laz	azy Approvals Template		
Nexus 1 Docume	Team Public ents			N365 Change Log			D.		15/10/2019 14:46		N3	N365 Change Log		
OSM / H	leat Rota 2	020		N365 Lab Change	Log				15/10/20	019 15:10	N3	65 Lab Change Log	3	
Meeting	Minutes R	ota		NexusChangeLog					15/10/20	019 14:31	Ne	xus Change Log		
Team M	leeting Min	utes		NexusPatching					15/10/20	019 15:59	Ne	xus Patching		
Service Docume	Manageme ents	nt		nexusteamcalenda	irnov19				19/11/20	)19 15:14	nex	kusteamcalendarno	v19	
N365 C	hange Log			serviceandsandfail	ures				15/10/20	)19 15:30	Ser	rvice and SAN Failu	res	

but we're not quite done yet ...

11) Now we need to create a list from our new template. Navigate to the home page of your SharePoint Online site and click on the cog menu (Site Settings) – This time select "Add an App". All the usual SharePoint Online apps will appear, but if you scroll through the pages of apps, your exported list template will usually appear at the end of the app list. Here's our example app (Lazy Approvals):



Click on it to create the custom list. You should see an identical list to the one you had in SharePoint on-premise.

Nexus365						
ROWSE ITEMS LIST						
s		sList				
iome	Title	Approval Status	Created	Created By	Modified	Modified By
exus Technical Documents	knoll BHEV	Declined	20/07/2020 15:03	<ul> <li>Phil May (Admin)</li> </ul>	20/07/2020 15:03	<ul> <li>Phil May (Admin)</li> </ul>
exus Team Public	pol to wev	Declined	20/07/2020 15:03	Phil May (Admin)	20/07/2020 15:03	Phil May (Admin)
ocuments	lop a wev	Approved	20/07/2020 15:03	Phil May (Admin)	20/07/2020 15:03	Phil May (Admin)
SM / Heat Rota 2020	sfsdfhbdfjhbdgf	Approved	20/07/2020 15:03	Phil May (Admin)	20/07/2020 15:03	Phil May (Admin)
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#### Note the following:

- A) All metadata is lost (as with previous methods of moving documents) In recreating the list, SharePoint Online will assume all items were created today by you (the person moving the list). This is could be acceptable if the list is used for reference
- B) As previously mentioned, this method assumes that your list content is as 'out of the box' as possible. Any customisations will either be lost entirely, or result in corruption of your list (so it's always worth trying this in a test site or sandpit environment first before doing it in a live production site).
- C) This method does not always work successfully for larger lists (the list tested above was only a few hundred entries long). It also fails with attachments but again it's worth trying if you have smaller lists with attachments that don't breach the upper file size limits for templating (around 40mb).

## Method 2: Saving a list as an Excel spreadsheet in On-Premises SharePoint, then creating a list from that Excel Spreadsheet in SharePoint Online.

This method can only be done on a Windows machine with Office installed, can only be done in Internet Explorer (or Edge in 'open in Internet Explorer' mode) and the results are hit and miss – again depending on the complexity of your SharePoint list. Using the same list as before for this method:

1) Begin by navigating to your SharePoint on-premise list and clicking on the "List" tab in the ribbon. You'll see a menu bar like this:

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2) This time, you need to click on the "Export to Excel" icon. Assuming you have Office installed, you should see the following screen:

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 Click "Open" to open the .iqy file in Excel – Now Microsoft has some security questions – click 'enable' to allow Excel to parse your file:

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4) You may be prompted for your login credentials. Make sure that you use a username / password in the following format:

Username – ad-oak\yourusername Password – your normal password

If you do not use the domain method to login, your credentials will fail.

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5) Once done, you should see a table version of your SharePoint List data in Excel:

6) In the "Table Design" tab in the Excel Ribbon, you'll see an "Export" option. Click on this and select "Export Table to SharePoint List" and you'll see the following screen:

_					
	Export Table	to SharePoint List	- Step 1 of 2	?	×
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For the SharePoint Online address, you will need the address of your Destination site

Don't tick the "Create a Read-Only connection to the new SharePoint List" Give your new list a name Give your new list a description then click "Next"

7) You'll then see a second screen telling you that SharePoint will convert certain columns in your list into particular column types:

Export Table to SharePoir	nt List - Step 2 of 2		?	×							
	To publish to a SharePoint list, Excel must force columns to use certain recognized data types. All cells with individual formulas will be converted to values.										
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Click "Finish" and your new list will be created – and Excel provides a link to it

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Click on the link and you'll see your newly created list in SharePoint Online in "Datasheet" view

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For some reason this method creates only a datasheet view of your list by default but you can very quickly build a standard view of your list:

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#### Note the following on using this method:

- With the "Add an App / Import Spreadsheet" method in a SharePoint Online site, using the exported spreadsheet as detailed above, that method did not work but using Office (latest version downloaded from Office.com) and Windows 10 and Edge (in Internet Explorer Mode) the above worked fine
- 2) Note the illusion that it has transferred your Metadata from your original list across. It has not, as all it has done is set up extra standard SharePoint list columns to transfer over the ORIGINAL Created / Created By / Modified / Modified By columns from your original list and added them to the new list. Unfortunately, not as metadata columns but this is actually quite useful if you just want a list for reference with the original dates preserved, certainly the only method by which you'll get your metadata out of SharePoint on-premise and into SharePoint Online

### **Other Notes and Support Points**

#### 'Staging Area' for file transfers from SharePoint On-Premises to SharePoint Online

With all of the above options we would advise that users backup their files, or take measures to create a 'staging area' on their own local machines, taking files from SharePoint on-premise into the staging area first, then moving those files to SharePoint Online rather than trying to open document libraries in explorer / via WebDAV and just dragging / dropping into SPO directly. The current on-premise service is backed up, but we do not offer the backup service for individual file / folder / library restores. Please consider this in all interactions between SharePoint on-premise and SharePoint Online.

The list move methods are relatively 'safe' in that you get a template file or an excel spreadsheet created with your data in it. We would advise that you leave your lists / libraries in place in SharePoint on-premise until you are ABSOLUTELY SURE that the copies / new versions in SharePoint Online are suited to your needs – then, if you want to clear out a SharePoint on-premise site, consult your Site Collection Admin and work in conjunction with them to clear space.

#### Other tools and methods of transferring files

If you do a good web search, you will probably find other options for getting content from SharePoint on-premise to SharePoint Online. Most of these either require scripting or changes to the back-end of either service, require purchasing third party tools, or require using tools that do not work very well or that should be used by people outside the Nexus Team.

Some of the tools will take up SharePoint resources on both sides, to the point where site collections and sites actually become unresponsive or unusable, often showing a 500 Internal Server Error. This was the case with ShareGate which will take all the bandwidth it can take during transfers and still manages to miss half the content. Other tools (even official Microsoft offerings) will asset-strip functionality from a modern SharePoint site, either locking it into a sort of halfway hybrid mode between a classic mode site and a modern site, or removing other useful bits of functionality like the ability to edit the quick launch menu, or enabling potentially damaging site features and site collection features held over from your source site in SharePoint on-premise.