



CASAHL Pre-Migration Assessment Service

Enterprises need to know what’s stored in their legacy systems before making infrastructure decisions or migrating to the cloud, but that challenge can seem overwhelming. Many legacy systems have accumulated years or decades of collaborative applications and documents. Modernizing a system without first understanding the content in those repositories makes it difficult to consolidate or optimize content and applications in new deployments, and can even carry old problems through to new deployments.

Successful infrastructure decisions start with an assessment. The CASAHL Pre-Migration Assessment Service is made to help enterprises discover exactly what’s in their legacy systems, what content is inactive or under-used, and how they can save on licensing, hardware, maintenance, training, and support costs accordingly. It discovers and analyzes information about legacy deployments, then compiles detailed reports on those deployments to help enterprises better understand their content and applications and plan their next steps, including whether migration is right for them.

Streamline Office 365 Migration

CASAHL Complements FastTrack for Full Office 365 Deployments

- Site and App Platforms**
 - SharePoint Apps
 - SharePoint Online
 - Notes/Domino/Quickr
 - Google Sites
 - Confluence
 - Exchange Public Folders
- File-Centric Systems**
 - Google Drive
 - Box
 - Dropbox
 - File Shares
- Enterprise DBMSs**
 - Access, SQL Server...
- Other Sources**

Office 365

- SharePoint Online
- OneDrive
- PowerApps
- Custom Apps
- Power BI
- Delve
- Groups

Microsoft Azure

- SharePoint Server
- Azure SQL Database
- Other Targets

On-Premises

- SharePoint Server
- SQL Server
- Other Targets

Proven with Over 650 Enterprises

Assessment is a two-step process. Enterprises need to discover what content, applications, and resources are stored in their legacy systems, then analyze the discovered resources to understand how they can best be addressed to save resources. As such, the Pre-Migration Assessment builds on two key parts of CASAHL’s DART lifecycle (illustrated above with Office 365), and works with the same wide

variety of legacy systems, including legacy SharePoint, SharePoint Online, IBM Lotus Notes/Domino, Google Drive and Sites, Confluence, file shares including Dropbox and Box, Exchange public folders, file systems, and CMIS-enabled enterprise content management (ECM) platforms.

Companies that take the time to understand their content and applications always find opportunities to organize, optimize, and save on maintenance and licensing costs by streamlining their deployments before migration even enters the picture. We're happy to work with your enterprise and migration partners to save you time, money, and effort.

How Does It Work?

The Pre-Migration Assessment service gathers information on the complexity, volume, usage statistics, and many other metrics on the content and applications in an enterprise's legacy systems, then delivers highly detailed reports to help enterprises decide how best to deal with those legacy deployments. These reports let enterprises see which resources are actively used and which aren't, what can be archived or retired, and where they can save on hardware, software, and licensing costs. This also gives enterprises the information required to build plans for quick and cost-effective migration of valuable legacy resources, and helps ensure that any migrations are carried out with the smooth efficiency required to keep users happy and build adoption of the new cloud deployments.

The service draws on CASAHL's Discovery and Analysis products, [the CASAHL Crawler](#) and [Analyzer](#), to provide that information. Once Crawler has finished collecting information on the selected legacy systems it uploads its findings to a CASAHL-designated secure site, where Analyzer processes the collected data and delivers detailed summaries and reports using the information provided by Crawler. Because it draws on those two products, the Pre-Migration Assessment is able to offer the same system-specific details in its reporting, including the following common legacy systems.

SharePoint

For legacy SharePoint systems, CASAHL delivers a PowerPoint report that provides a high-level executive summary of the selected environment, highlighting key takeaways on sizes, distributions, usage, and properties of sites, files, users, and more. A detailed Excel report contains site-level scale/complexity scores, data on users and usage, and listings of all SharePoint objects (such as InfoPath forms, workflows, and more). Lastly, an Overall Summary Report (Excel) provides views of the environment organized by usage, file types, and author. Pivot charts in the summary report allow you to customize the layout of the information for easier interpretation or presentation.

CASAHL is also able to perform in-depth analyses on SharePoint Online deployments, including associated OneDrive for Business instances and Teams, and Office 365 Groups sites, and generate reports that include details on comprehensive inventories of each object, complexity scores, remediations, and add-ins.

SharePoint Analysis: Reported Data (by site)

Site Size	Analyzer compiles data on the total size of the entire site, the total size of the files in that site, and the sizes of each individual file larger than 250MB.
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Site Users	Crawler reports on the author and editor activity for each site.
Complexity Rating	Analyzer rates SharePoint sites on their size, their complexity, and the amount of work required to redesign them for modernized systems.
Scale Rating	Each SharePoint site assigned a Complexity Rating is given a Scale Rating that indicates the estimated time needed to redesign that site for a modernized system.
Site Collection, Sites, Sub-Sites, and ACL	Analyzer lists the settings and properties for each site and sub-site, as well as the permission specifications in the form of access control lists.
Lists	Analyzer collects on the settings, properties, templates, and object counts for all lists and libraries.
Folder Path Depths	A record of the amounts of nesting in and the layouts of file trees.
Solutions and Sandbox Solutions	Analyzer records data on both types of custom SharePoint apps, including how they are customized, what their permissions are, and how they are deployed.
Workflow Templates and Instances	Analyzer examines and records the types of templates used and the frequency of their use to determine which are most important to migrate.
Content Types	Crawler provides a compiled list of the lists, alarms, custom SharePoint sites, workflow templates, web apps, and other content and applications it discovers.
Alerts	Analyzer compiles data on the alerts found in the system, including their event types, who and what they are used by, and the location of items used during the alerts.
Farms	Analyzer maps out the layout and configuration of on-site servers in the system.
Documents, Lists, Items, and Attachments	Analyzer provides a compiled list of documents, list items and attachments to those items, the properties of the list items, any files with blocked file extensions, and any duplicate documents.
InfoPath Templates and Instances	Crawler reports on the use of InfoPath in conjunction with the enterprise's SharePoint systems.
Event Receivers	Crawler reports on the use of Event Receivers in conjunction with the enterprise's SharePoint systems.
Web Apps	Analyzer reports on the location of the app in the SharePoint server farm, any blocked file extensions the app may specify, the time zone the app is set to, and any specific web configuration mods the app uses.
Permission Inheritance	Analyzer provides a summary of the ownership of and access to account permissions as spread across the site.
Usage and Age	Crawler lists the date created, versions created, and modifications by location for documents and list items, with the data organized by month.
Pages and Web Parts	Crawler collects data on the web-centric uses of SharePoint for both Pages and Web Parts.
Features	Crawler collects data on all SharePoint Features in the system, including their properties and the SharePoint items associated with each feature.

Google Drives and Sites

CASAHL delivers a high-level executive PowerPoint summary of the selected environment that highlights key takeaways on sizes, distributions, usage, and properties of sites, files, users, and more. An Overall Summary Report in Excel details views of the environment organized by usage, file types, and author/editor. Pivot charts allow you to customize and view information based on documents, items, users, and sites/containers.

Google Drives and Sites Analysis: Reported Data

Drive Folders	Analyzer reports on the settings, properties, and total files found in each Google Drive or Site for which an instance of Crawler was run.
Folder Path Depths	Analyzer examines and records the amounts of nesting and layouts of file trees in the systems.
Drive Users	Analyzer compiles a list of author and editor activity is compiled for each Google Drive and Site.
Usage / Age	Analyzer compiles a report on the date files were created and the modifications made to them over time.
File Properties, File Types, and Total Files	Analyzer compiles a list of files, the properties of those files, the types of those files, and any instances of duplicate files.
Total File Size	Analyzer compiles data on the total size of the files in each Drive or Site, and the sizes of each individual file larger than 250MB.
Most Used Office File Types By Count	Analyzer compiles counts of file instances as categorized by file type as well as data on how often those file types are used.
Files by File Family	Analyzer compiles a list of all Office documents in named groupings of file types, e.g., .docx, .doc, .xls, and .xlsx for Office file types, etc.

File-Based Systems: Box, Dropbox, File Shares, Exchange Folders, and ECM Systems

CASAHL delivers a high-level PowerPoint executive summary of the selected environment highlighting key takeaways on sizes, distributions, usage, and properties of sites, files, users, and more. An Excel Overall Summary Report details views of the environment organized by usage, file types, and author/editor. Pivot charts allow you to customize and view the information based on documents, items, users, and sites/containers.

File-Based Systems Analysis: Reported Data

Source (Drive/Folders/etc.)	Analyzer reports on the settings, properties, and total files found in each system for which an instance of Crawler was run, as well as the permission specifications for the source in the form of access control lists.
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Folder Path Depths	Analyzer examines and records the amounts of nesting and layouts of file trees in the systems.
Users	Analyzer compiles a list of author and editor activity is compiled for each location in the system.
Usage / Age	Analyzer compiles a report detailing the date the files were created and the modifications made to them over time.
File Properties, File Types, and Total Files	Analyzer compiles a list of files, the properties of those files, the types of those files, and any instances of duplicate files.
Total File Size	Analyzer compiles data on the total size of the files in each Drive, and the sizes of each individual file larger than 250MB.
Most Used Office File Types By Count	Analyzer compiles counts of file instances as categorized by file type as well as data on how often those file types are used.
Files by File Family	All Office documents are listed in named groupings of file types, e.g., .docx, .doc, .xls, and .xlsx for Office file types, etc.

Notes/Domino Applications and Databases

CASAHL delivers a high-level PowerPoint summary and a highly detailed Excel report showing every Notes application or database submitted for analysis. Notes/Domino applications in particular tend to be complex, but CASAHL's reports can also cover Quickr, QuickPlace, and other related Notes products.

Notes/Domino Analysis: Reported Data (for every Notes/Domino application)

Complexity / Scale Rating	Notes/Domino applications are given Complexity Ratings based on their size, their complexity, and the amount of work required to redesign them for modernized systems. Once each application has been given a Complexity Rating it is given a Scale Rating that indicates the estimated time needed to redesign that app.
Migration Recommendation	Analyzer compiles data on the Notes/Domino applications found in the system and, in combination with the Complexity and Scale Ratings of the apps, produces recommendations for the migration of those resources.
Target Platform	Reports from Analyzer are used to suggest the best migration target platform for each Notes/Domino application on an app-by-app basis.
Usage Activity	Analyzer compiles data on the usage activity for each Notes/Domino application per day, for the last month, and in the entire history of that Notes/Domino application.
User Activity	Analyzer compiles data on the users who have accessed given Notes/Domino applications, the types of access each user performed, and the total counts of access by type.

Size and Quantity of Documents	Analyzer compiles a list of documents in the Notes/Domino system, with information on the size and quantity of those documents.
Template Consolidation Group	Analyzer reports on the use of templates in the Notes/Domino system, whether those templates are consolidated into groups, and the contents of the group if so.
Forms, Fields, Views, and Agents	Analyzer collects data on the number of forms, fields, views, agents, sections, and tables present in each Notes/Domino application.
Access Control Lists	Analyzer provides a summary of the access to account permissions as spread across the Notes/Domino apps in access control lists.
Formulas	Analyzer collects data on the number, location, and types of formulas found in Notes/Domino content.
Lookups and Dependencies	Analyzer compiles a report on the cross-linking and dependencies of each Notes/Domino application to other Notes/Domino applications.
Replica Usage	Analyzer compiles a report on all replica instances found in the Notes/Domino system.

Next Steps and Other Information:

By building on the unique capabilities in [CASAHL DART](#) and applying a set of techniques, tools, and templates refined over thousands of enterprise migrations worldwide, the Pre-Migration Assessment Service provides a comprehensive, rapid, and cost-effective solution for enterprises burdened with accumulated legacy content. Once enterprises understand their legacy content and applications, the next step for enterprises that choose to migrate is CASAHL’s [Rationalization Service](#), where the information produced by the assessment is used to construct migration plans, produce fact-based estimates for migration duration and scope, and address potential migration before moving on to the transition itself with our [Fixed-Fee Migration](#) and [Application Recomposition](#) services.

Please [contact us](#) to learn more about the Pre-Migration Assessment Service, or see our site for more information on [our other service offerings](#).

About CASAHL

CASAHL is a product company that helps you move meaningful content and important applications to the cloud, starting with legacy system assessment and continuing all the way through a complete migration. We work with source enterprise systems including Lotus Notes, SharePoint, Office 365, Google Sites, file sharing systems (file servers, Box, Dropbox, and Google Drive), enterprise content management systems, and database systems. CASAHL's product focus includes modernizing and migrating critical content and collaborative applications from legacy systems to the cloud, keeping related resources optimized post-migration, and helping enterprises attain peak value from their new investments.

CASAHL is a proud repeat winner of Microsoft Partner of the Year for migration solutions and has been exclusively focused on content/collaboration optimization products and solutions since 1993. Together with systems integrator partners including Microsoft, Sogeti, Perficient, Avanade, and others, we have migrated the content and apps of over 650 enterprise accounts into SharePoint and Office 365 over the past eight years. To learn more about engaging CASAHL's migration and ongoing optimization solutions, please [contact us](#), and see our blog for perspectives on up-and-coming enterprise collaboration/content topics.



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