

TEAMS FIRST APPROACH TO FILE SHARE AND SHAREPOINT MIGRATIONS

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12 – 1 PM EST



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ENVISION IT

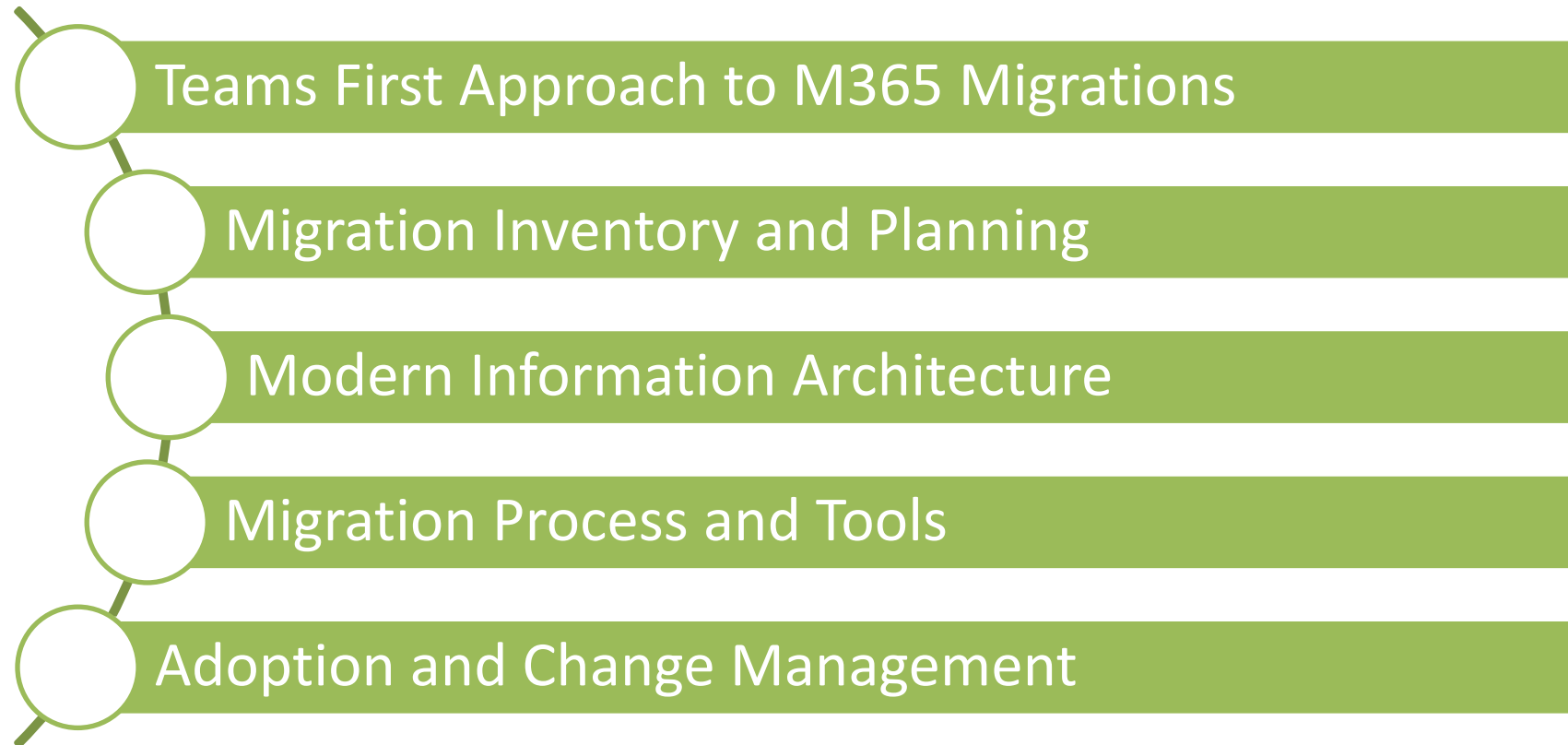
- Microsoft 365 productivity consultants
- Go-to partner for Modern Workplace, Records Management, Intranets, and Extranets
- Working with SharePoint since 2001
- Microsoft Gold Partner
- Multiple award winner



Gold Cloud Productivity
Gold Application Development
Silver Cloud Platform
Silver Small and Midmarket Cloud Solutions



AGENDA



Types of Migrations

File Shares

- Multiple file shares
- Departments, projects
- Personal file shares

SharePoint On-Premises

- Intranet
- Collaboration, Team Sites
- My Site
- Deep subsite structure

Legacy Records Management

- OpenText
- FileNet
- Content Manager

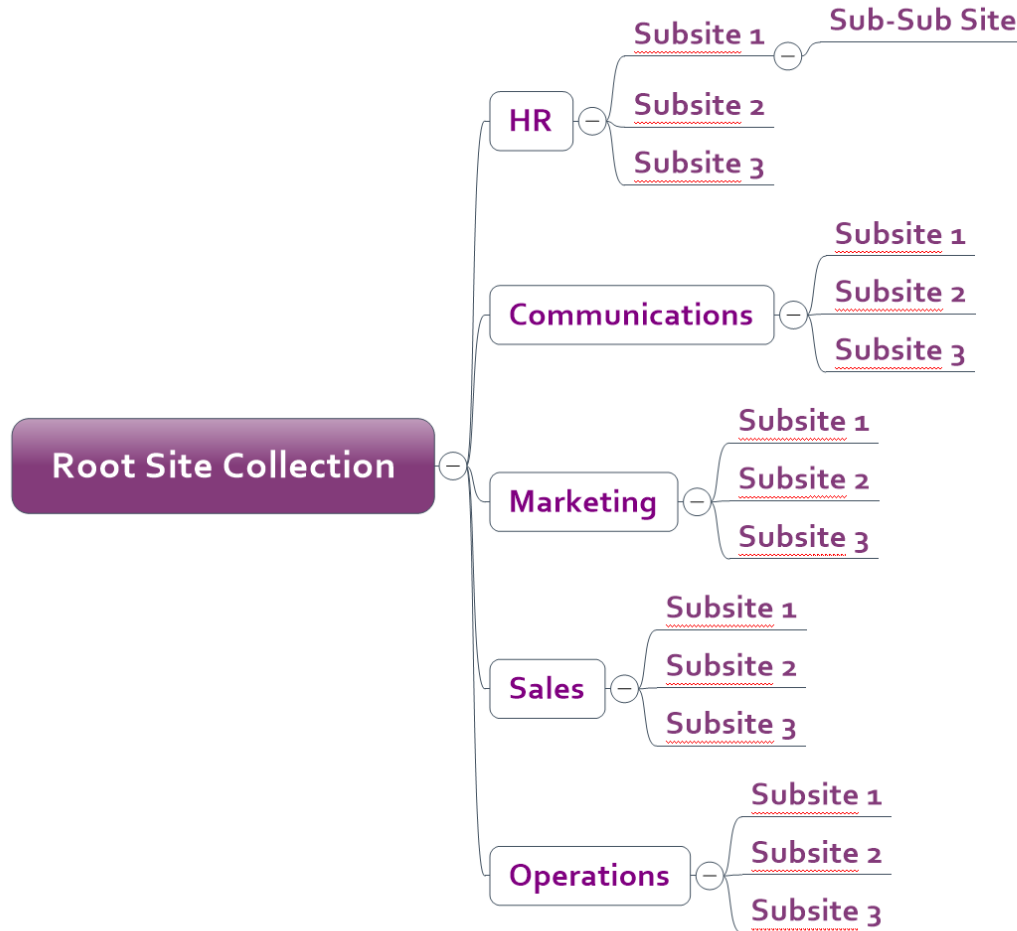
SharePoint Online

- Classic Intranet
- Classic Team Sites
- Deep subsite structure

INFORMATION ARCHITECTURE

- Even with a good plan, information architecture is a continual process
- No more site/sub-site – new flat structure where all sites are site collections
 - Modern subsites are supported but not recommended
- Hub Sites create a group of sites that share navigation, branding and other elements
- Teams tends to drive the IA discussion

CLASSIC VERSUS MODERN IA



TEAMS FIRST INFORMATION ARCHITECTURE

- What does a Team represent?
- What does a Channel represent?

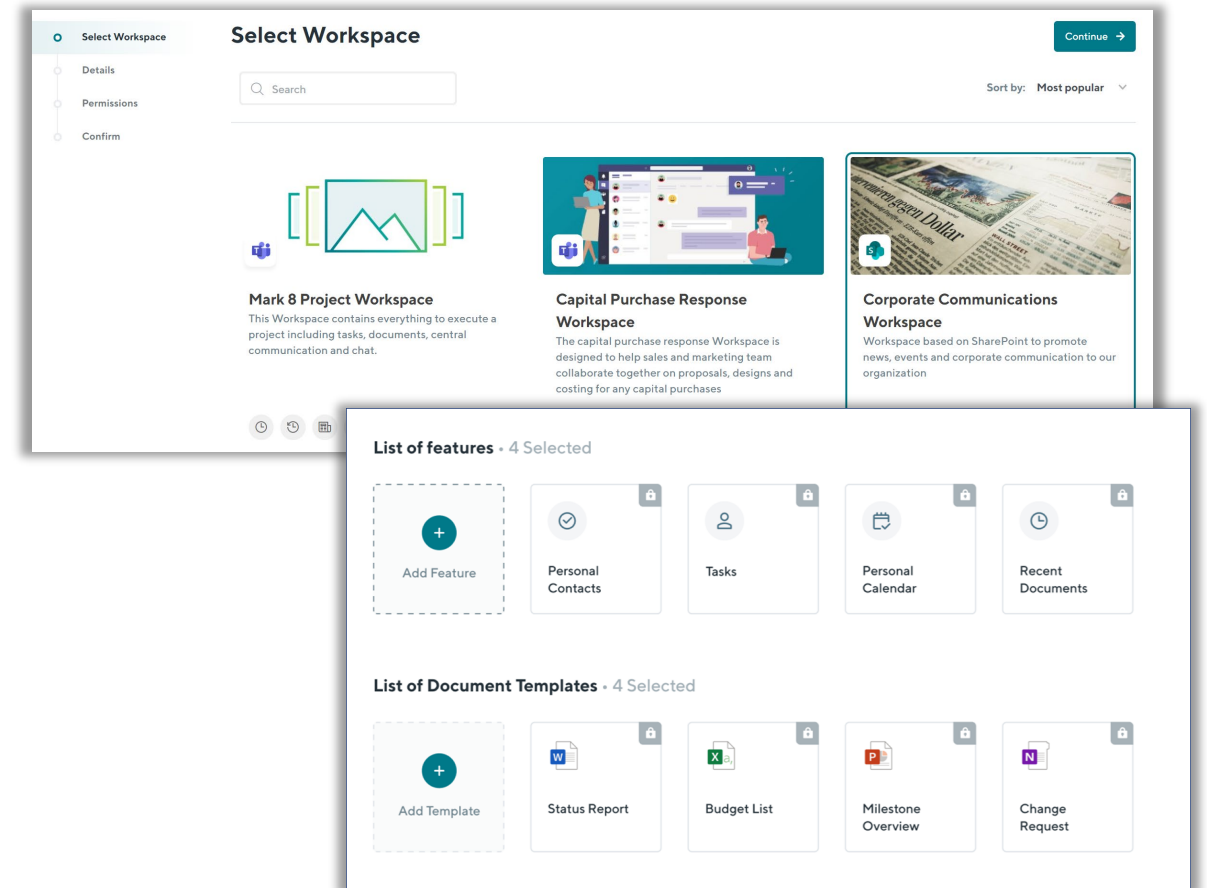
Team	Channel
Department	Sub-departments, projects, products, folders
Client	Project
Location	Project
Projects	
Initiatives	

FOLDERS, DOCUMENT SETS, AND METADATA

- Teams encourages folders
- Teams also now supports rich metadata and views
- Document sets can be used to simplify assigning metadata
- Additional metadata can be set at the document level
- Folders can still be used

TEAMS AND SITES PROVISIONING

- Automate the creation of Teams and Sites
- Based on Teams and Sites Templates
 - Project Teams
 - Department Teams
- Integrate OneNote and Planner in Templates
- Approaches:
 - [Open Source project](#)
 - [Orchestry](#)
 - [Valo Teamwork](#)
 - [Bindtuning](#)



TEAMS AND SITE PROVISIONING PROCESS

Site Request

Division *

Leviathan Security Group

Site Template *

Client Site

Title *

Purpose

Alias *

Public Group

☒ Yes

Create Team

☒ Yes

Submit

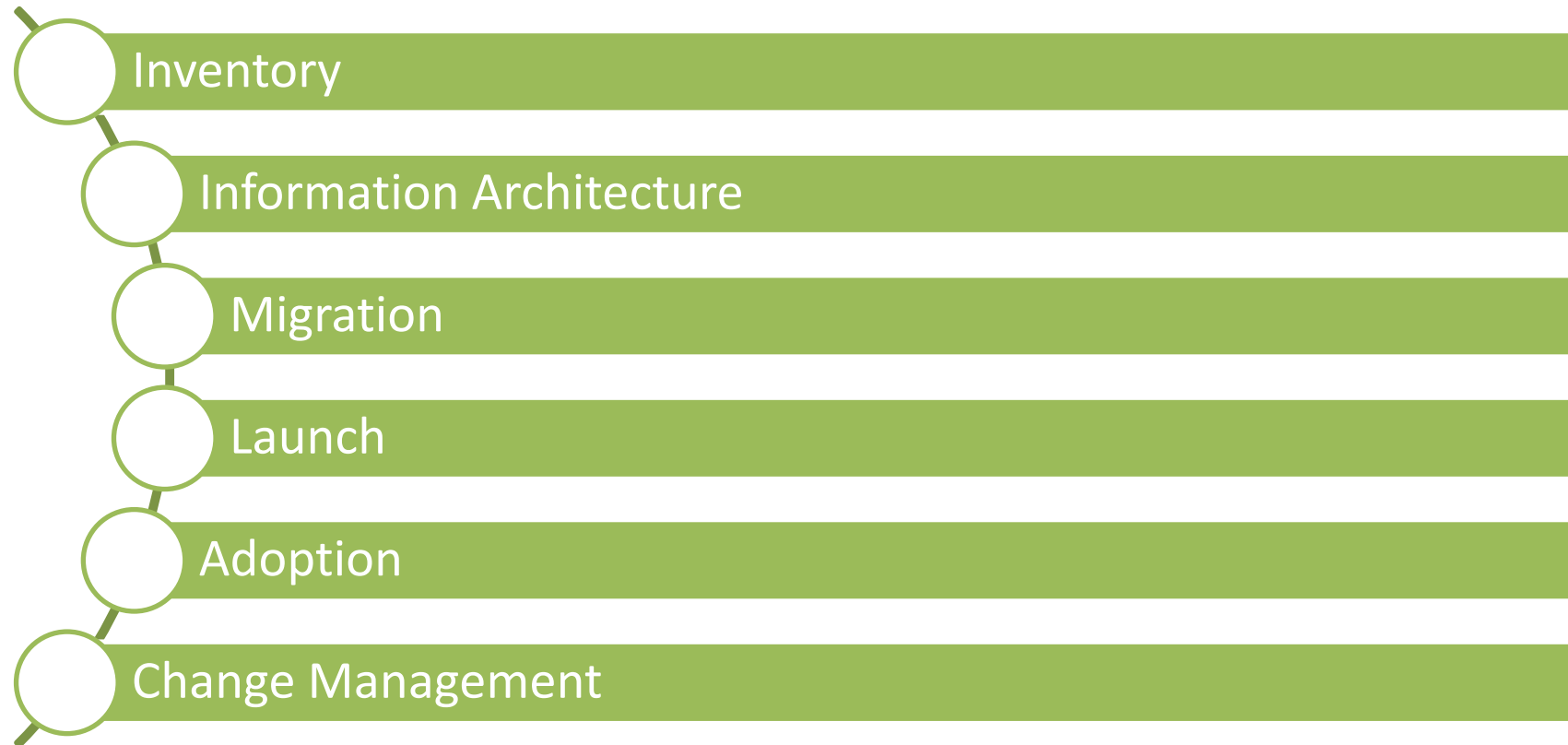
Cancel

- Open Source Solution
- Effective governance to avoid site sprawl
- Intuitive form for creation of new Team site
- Logic App generates O365 Group
 - SharePoint Site including OneNote
 - Exchange calendar and mailbox
 - Microsoft Team
 - Optional Project (Channel)
- A-Z SPFx web part
- May be integrated with Extranet User Manager, Dynamics 365, Salesforce, SAP, etc.

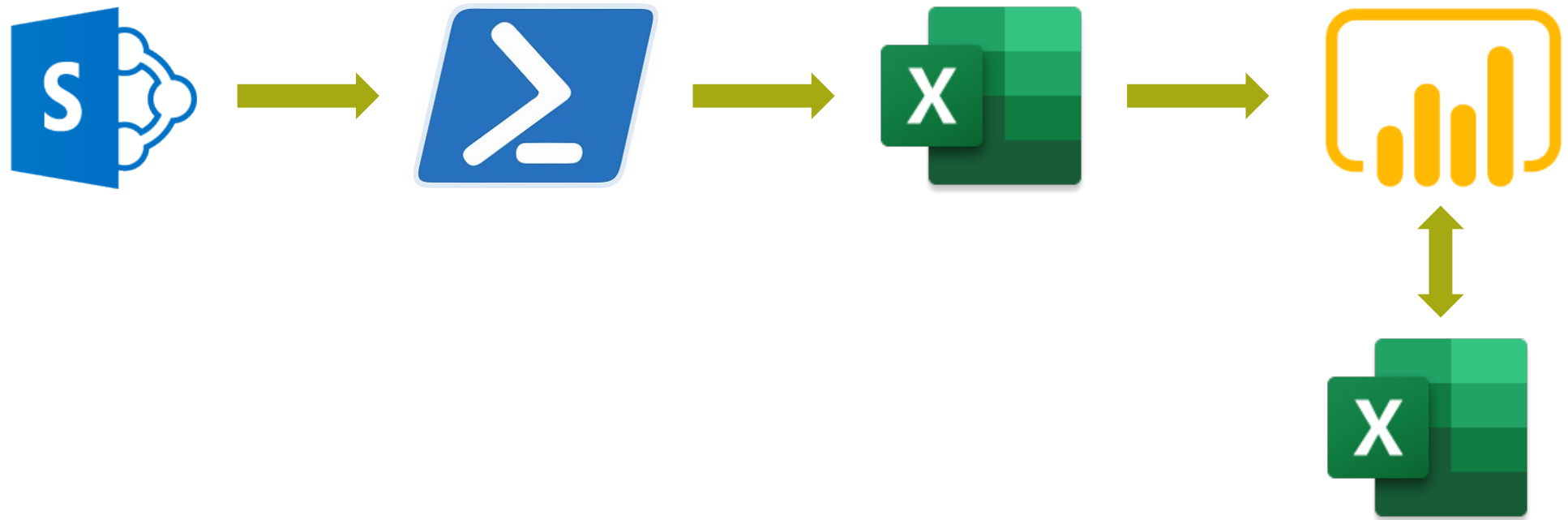
SHAREPOINT ONLINE MIGRATION

- Re-thinking your information architecture to align with use of Teams and SharePoint Online
- Migration Tools can be used to manage the migration process
- Ideal time to evaluate all content and reorganize, update or prune as appropriate

PROCESS OVERVIEW



INVENTORY



blog.petercarson.ca/posts/preparing-for-a-file-share-migration-to-sharepoint-with-power-bi

PRE-UPGRADE ASSESSMENT

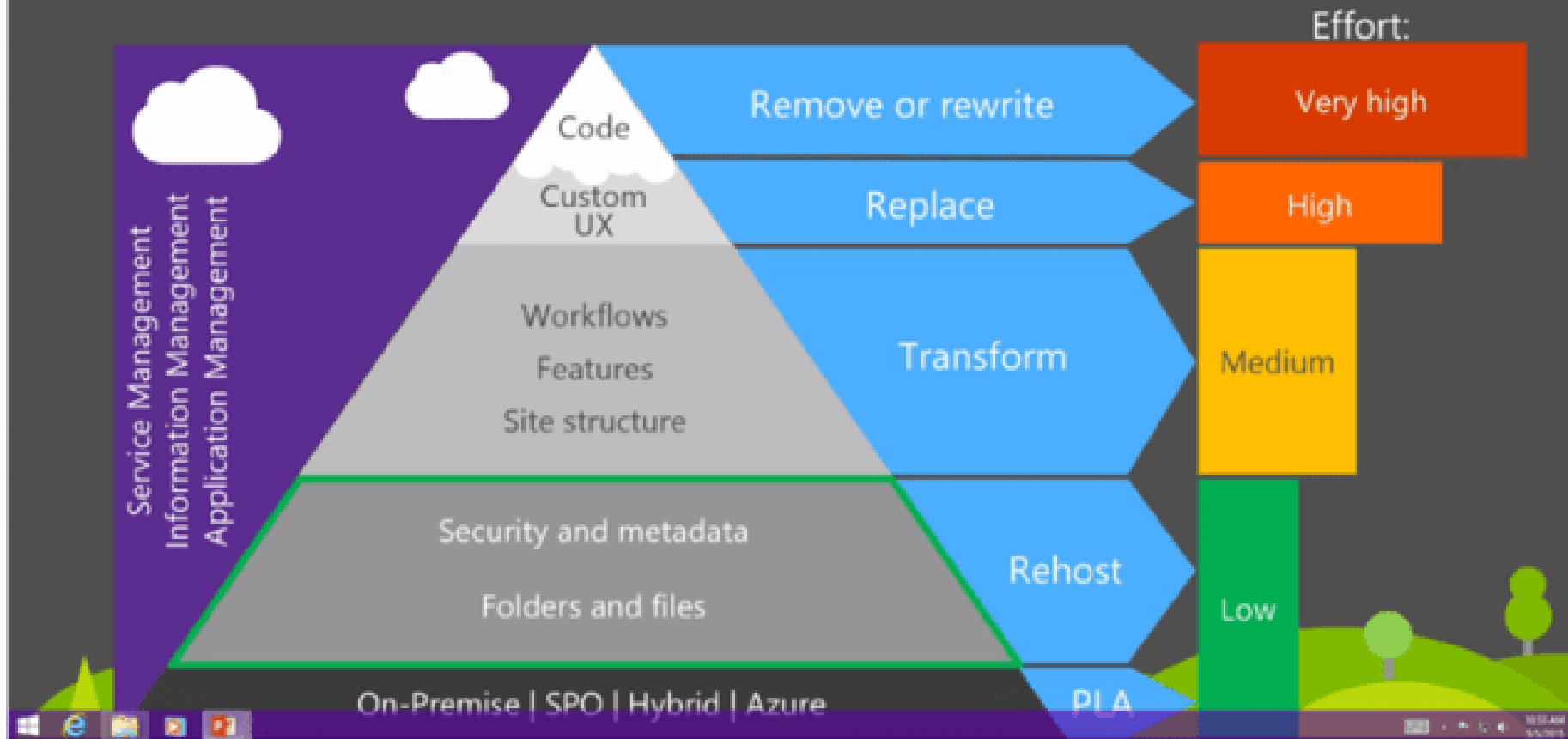
Steps

- Inventory your content
- Review all custom and vendor solutions
- Consult with you to determine the best upgrade approach

Deliverables

- Inventory of your content:
 - Site collections
 - Sites
 - Lists and libraries
 - Folders
 - Documents
- Power BI analysis
- Recommended approach and estimated cost for migration or upgrade

Migrating The Collaboration Triangle

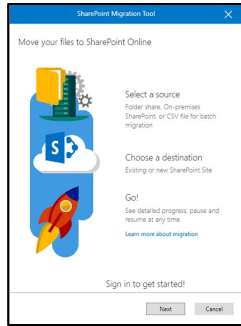


<https://slideplayer.com/slide/13041452/>

PLANNING

- Generate reports to identify and mitigate any issues
- Determine the appropriate migration tool
- Tools provide a number of valuable reports
- Conduct Migration POC
- Plan out migration timeline
- Assistance with migration itself

MIGRATION TOOLS



SharePoint Migration Tool



OneDrive Sync Client

Sharegate

Sharegate



Xillio



ONEDRIVE SYNC CLIENT

- Sync local copy of sites/folders to PC
- Copy those sites/folders into new SharePoint Online environment
- Will retain the modified date
- Works well for simple scenarios
- Can also work well for file share migrations



SHAREPOINT MIGRATION TOOL

- Free tool to help migrate content from on-premises SharePoint and file shares to Microsoft 365
- Supports migration to SharePoint, OneDrive and Teams
- Includes SharePoint Migration Assessment Tool (SMAT)

MIGRATION – COMPREHENSIVE PLANNING REPORTS (SHAREGATE)

Site Collection
Report

Permissions
Matrix Report

Unused Site
Report

Orphaned User
Report

Audit Report

Checked out
Documents
Report

External User
Report

Lists with
Workflow Report

Site Report

Sites with Custom
Permissions
Report

External Sharing
Report

Workflow Report

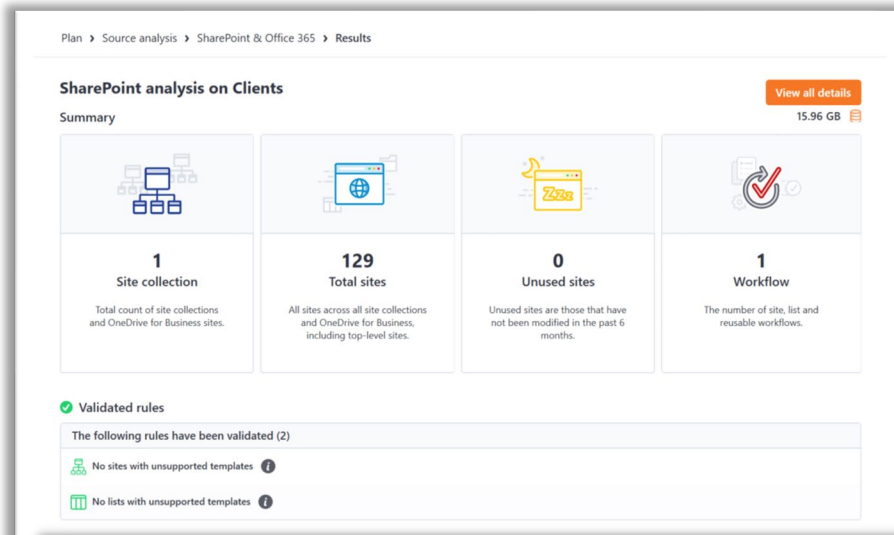
Sharegate

- Founded in 2009
- 250+ employees
- Trusted by over 75,000 IT professionals worldwide
- Not just a migration tool – Microsoft 365 governance tool
- Rich reporting

Sharegate

SHAREGATE – PLANNING REPORTS












- Sharegate
 - Source Analysis
 - Number of Site Collections/Sites
 - Detailed info on List, Document Library, Site: size, last modified



Plan > Source analysis > SharePoint & Office 365 > Results > Details

SharePoint analysis details

Export Filter

	Title	Site name	URL	Errors & warnings
	Clients	Clients	https://envisionit.sharepoint.com/sites/clients/	CUSTOM MASTER PAGE CUSTOM FEATURES
	Blank Rome	Blank Rome	https://envisionit.sharepoint.com/sites/clients/BlankRo...	CUSTOM MASTER PAGE
	MicroFeed	Blank Rome	https://envisionit.sharepoint.com/sites/clients/BlankRo...	
	Quick Links	Blank Rome	https://envisionit.sharepoint.com/sites/clients/BlankRo...	
	Meeting Minutes	Blank Rome	https://envisionit.sharepoint.com/sites/clients/BlankRo...	
	Private Documents	Blank Rome	https://envisionit.sharepoint.com/sites/clients/BlankRo...	
	Shared Documents	Blank Rome	https://envisionit.sharepoint.com/sites/clients/BlankRo...	
	Site Assets	Blank Rome	https://envisionit.sharepoint.com/sites/clients/BlankRo...	
	Site Pages	Blank Rome	https://envisionit.sharepoint.com/sites/clients/BlankRo...	
	Brock University	Brock University	https://envisionit.sharepoint.com/sites/clients/Brock-U...	CUSTOM MASTER PAGE
	Board of Directors Portal	Board of Directors Portal	https://envisionit.sharepoint.com/sites/clients/Brock-U...	CUSTOM MASTER PAGE

SHAREGATE – PLANNING REPORTS II


- Sharegate
 - Permissions Matrix Report – Detailed User & Group Access to Site Collections & Content
 - Report can be generated for specific users and Groups
 - Report can be generated for external users

Plan > Targets > Options

Permissions matrix report

Get a complete overview of the permissions assigned to your subsites, lists, libraries, folders, documents, and items.

Permissions matrix report targets

 Clients
<https://envisionit.sharepoint.com/sites/clients/>

Users and groups
Select the users and groups you want to be displayed in your report.



All users and groups ▼








Select object types
Select the objects you would like to add to your report.

☒ Lists
☒ List content

Plan > Targets > Options > Results

Permissions matrix report on Clients

  Export

 Meeting Minutes	Same as parent View				
	 Staff	Explicit	<input checked="" type="checkbox"/>		
	 Cody Broker	Explicit			<input checked="" type="checkbox"/>
	 Huzefa Jamnagarwala	Explicit	<input checked="" type="checkbox"/>		
	 SQLP_agent	Explicit			
Same as parent View					
 Shared Documents	Same as parent View				
 Site Pages	Same as parent View				

SHAREGATE - PLANNING REPORTS III

- Checked Out Files on a particular site collection or site

The screenshot displays the 'Checked out documents report on Clients' in the ShareGate application. The breadcrumb trail at the top reads 'Plan > Targets > Results'. The report title is 'Checked out documents report on Clients', and there is an 'Export' button in the top right corner. Below the title, it indicates 'Results (1)'. A table lists the checked-out documents:

<input checked="" type="checkbox"/>	Name	List	Location	Checked out sta...	Check...
<input checked="" type="checkbox"/>	Power BI.aspx	Site Pages	https://envisionit.s...	Checked out	Peter C...

To the right of the table, a context menu is open for the selected file 'Power BI.aspx'. It shows the file type as 'Document' and the full URL: <https://envisionit.sharepoint.com/sites/clients/WD...>. The menu includes the following actions:

- Download
- Check in
- Discard check out
- Clean version history
- Break inheritance
- Restore inheritance
- Remove anonymous guest links
- Edit
- Delete permanently

A 'Back' button is located at the bottom left of the interface.

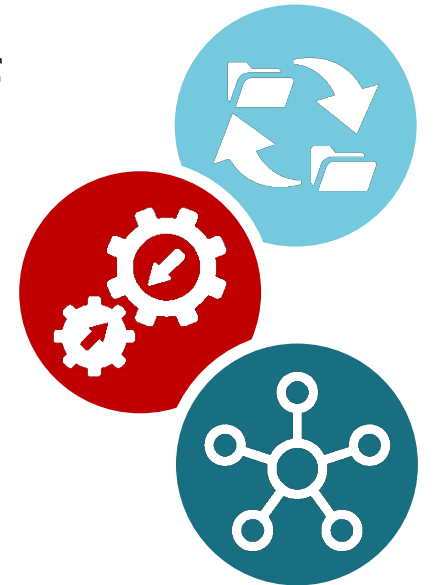
XILLIO

- Founded in 2004, focusing on complex content migrations since
- >2010 in-house developed migration software
- 60+ migration connectors
- 250+ migration clients
- Xillio USA office
- 2019 Microsoft Content Services Charter Partner
- 2021 Microsoft MISA partner
- Added 2 MVP's to consultancy staff in 2021



XILLIO MISSION

Help organisations around the globe to move from **legacy** to **modern Content Services in Microsoft 365**, maximizing the value of their content and content processes and benefit fully of the latest and greatest technologies



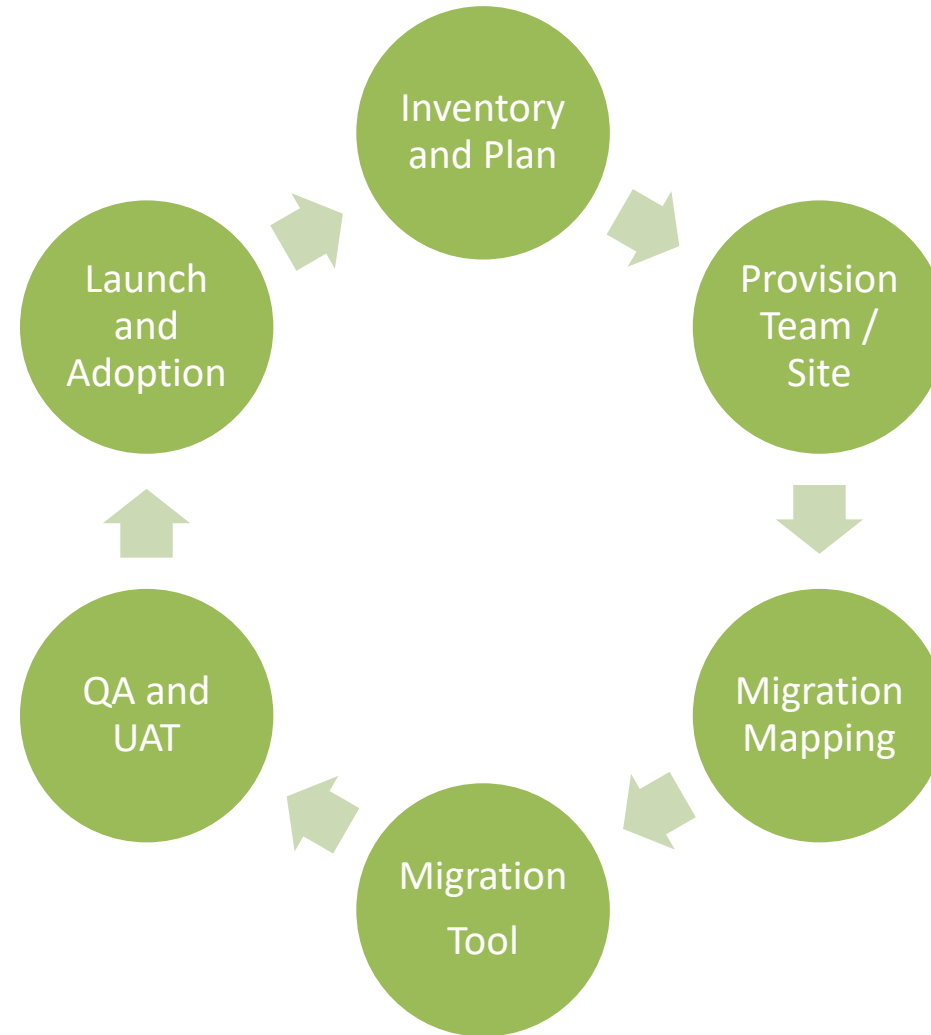
XILLIO MIGRATION PLATFORM



XILLIO KEY DIFFERENTIATORS

- Proven support for all major legacy ECM systems
- Data visualizations and insights for data driven business rules
- Created to handle any exception
- Unified Data Model for standardization and efficiency
- Strong experienced services organization that understands both legacy ECM and Microsoft 365
- 17+ years of content migration experience part of the software

TEAMS FIRST SHAREPOINT MIGRATION



Migration Throughput and Approaches

- Sharegate throughput typically 1-2 Gb / hour
 - Can be increased with multiple licenses and VMs
- Xillio can be much higher
- Tools need to be close to the source or in the same Azure data centre as Microsoft 365
- Pre-migration can be followed by incremental on cutover weekend
- 2 TB content @ 1.5 GB / hour is 55 days
- 15 VMs could bring that down to 3-4 days
- Pre-migration of 90% of content followed by incremental migration could complete in a weekend
- Content size and metadata complexity affect throughput

Migration Approaches

Full Migration

- Testing
- Pre-migration
- Sources read-only
- Incremental migration
- Testing
- Go / No-Go
- Live

Multiple Migrations

- Same approach
- Identify departments, projects, etc.
- Multiple migration weekends
- More change management
 - Old and new systems running concurrently

CHANGE MANAGEMENT AND ADOPTION



- Focus on departmental success
- Transition and transformation
- Piloting
- Target long term success through subject matter expertise

TRAINING

With 20 years of training experience, we offer end-user training courses in:

- Microsoft Teams
- Modern Collaboration
- Microsoft 365



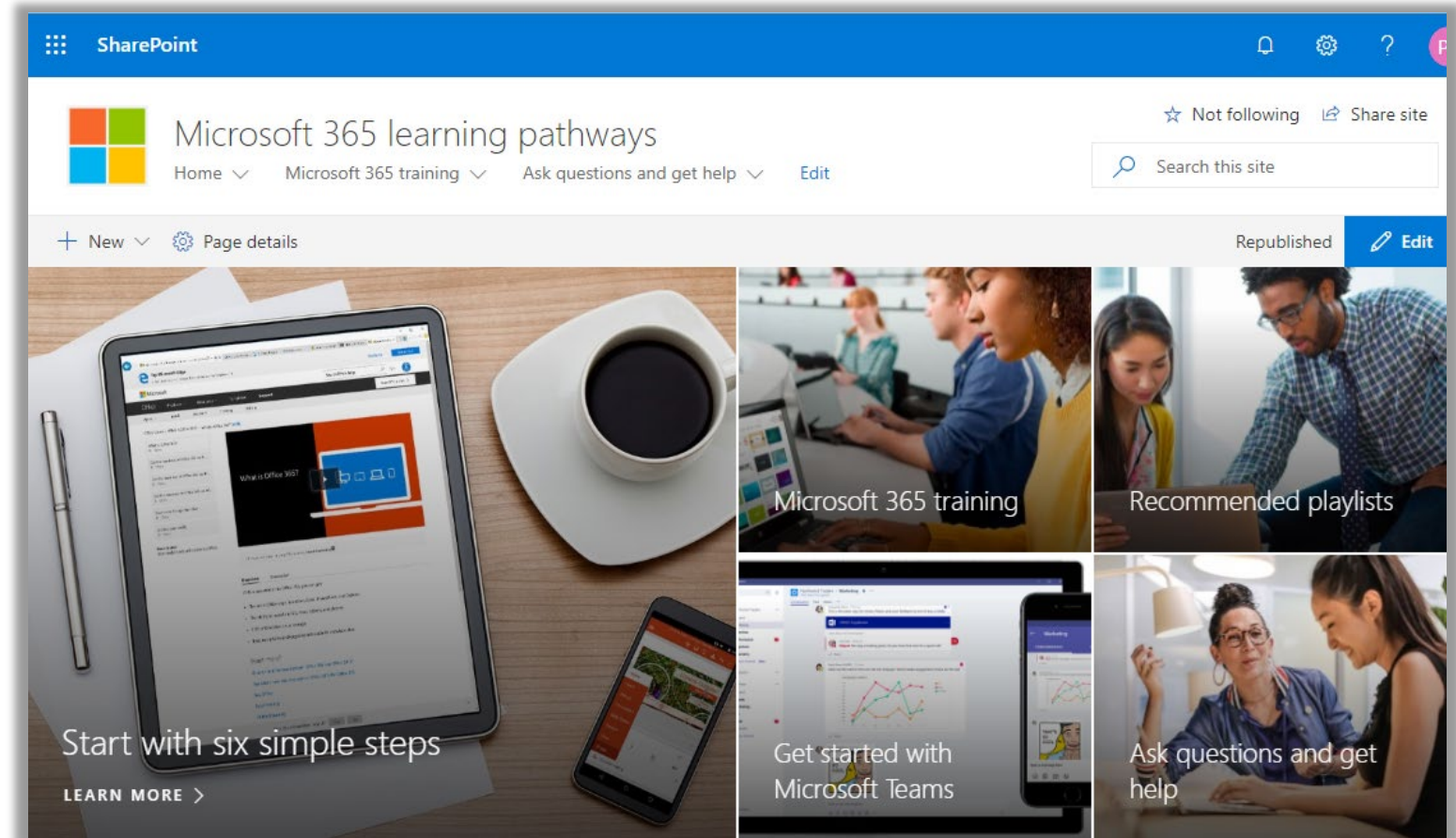
TRAINING STRATEGY AND OPTIONS

Technical	End-User	Knowledge Transfer Session	Custom Options
<ul style="list-style-type: none">• Recommend official Microsoft Curriculum course delivered by 3rd parties	<ul style="list-style-type: none">• Teams for End Users• Collaboration for Site Members• Collaboration for Site Owners	<ul style="list-style-type: none">• Ad-hoc sessions• Custom sessions on site configuration	<ul style="list-style-type: none">• Custom training guides• Lunch and Learns• Quick Reference Cards

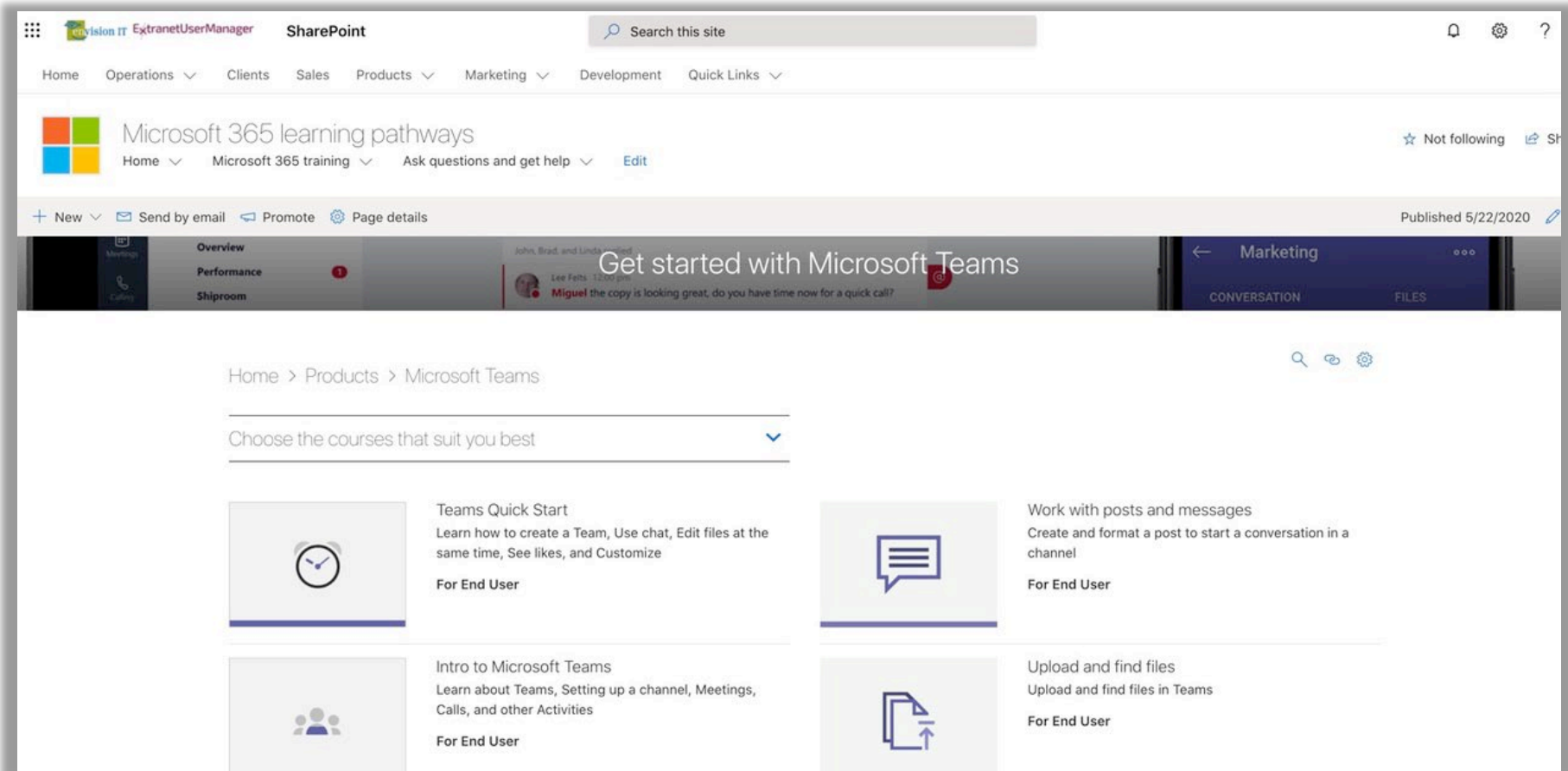
- ✓ Hands-on train-the-trainer sessions
- ✓ Guides or PowerPoint decks provided
- ✓ Course design and schedule that fits your organization

LEARNING PATHWAYS

- Collection of online training videos and quick help
- Not just for Teams, much of Microsoft 365
- Customizable
- Future friendly



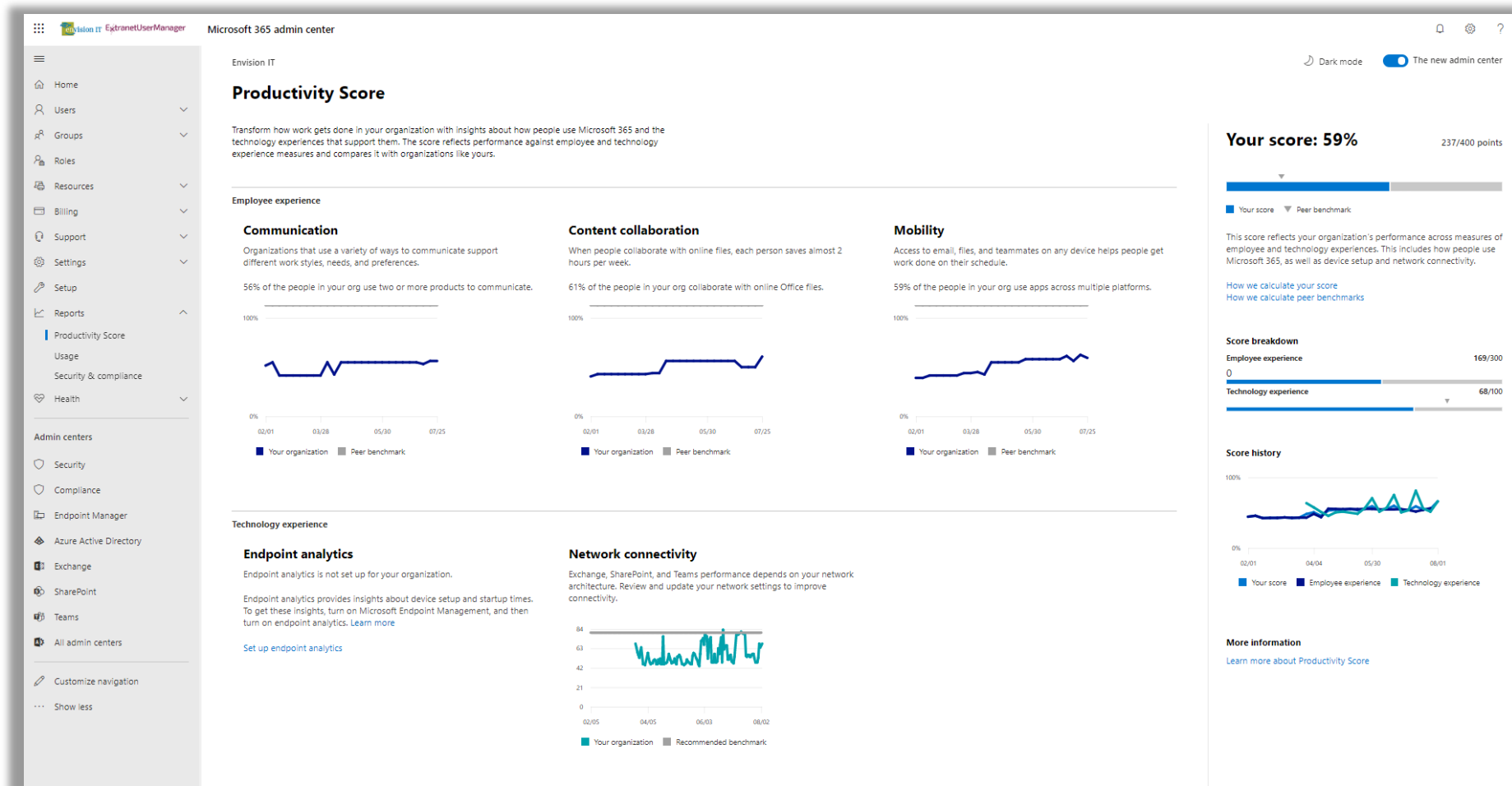
LEARNING PATHWAYS – MICROSOFT TEAMS



The screenshot shows a SharePoint page for 'Microsoft 365 learning pathways'. The top navigation bar includes 'Home', 'Operations', 'Clients', 'Sales', 'Products', 'Marketing', 'Development', and 'Quick Links'. The page title is 'Microsoft 365 learning pathways' with a subtitle 'Home > Microsoft 365 training > Ask questions and get help > Edit'. Below the title is a 'New' button and a 'Send by email' button. The main content area is titled 'Get started with Microsoft Teams' and features a breadcrumb trail 'Home > Products > Microsoft Teams'. A dropdown menu allows users to 'Choose the courses that suit you best'. There are four course cards displayed:

- Teams Quick Start**: Learn how to create a Team, Use chat, Edit files at the same time, See likes, and Customize. For End User.
- Work with posts and messages**: Create and format a post to start a conversation in a channel. For End User.
- Intro to Microsoft Teams**: Learn about Teams, Setting up a channel, Meetings, Calls, and other Activities. For End User.
- Upload and find files**: Upload and find files in Teams. For End User.

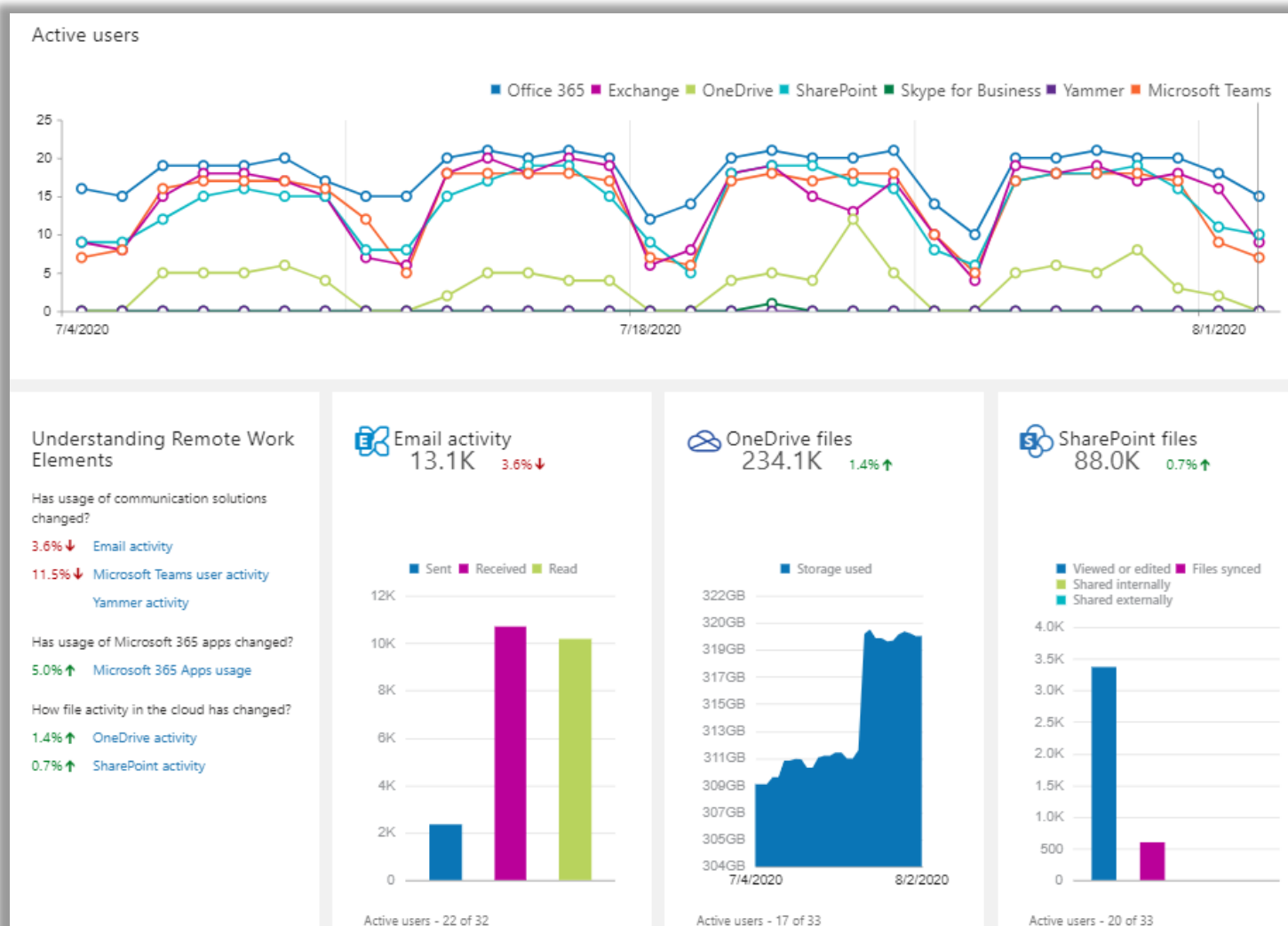
MICROSOFT 365 ANALYTICS – PRODUCTIVITY SCORE



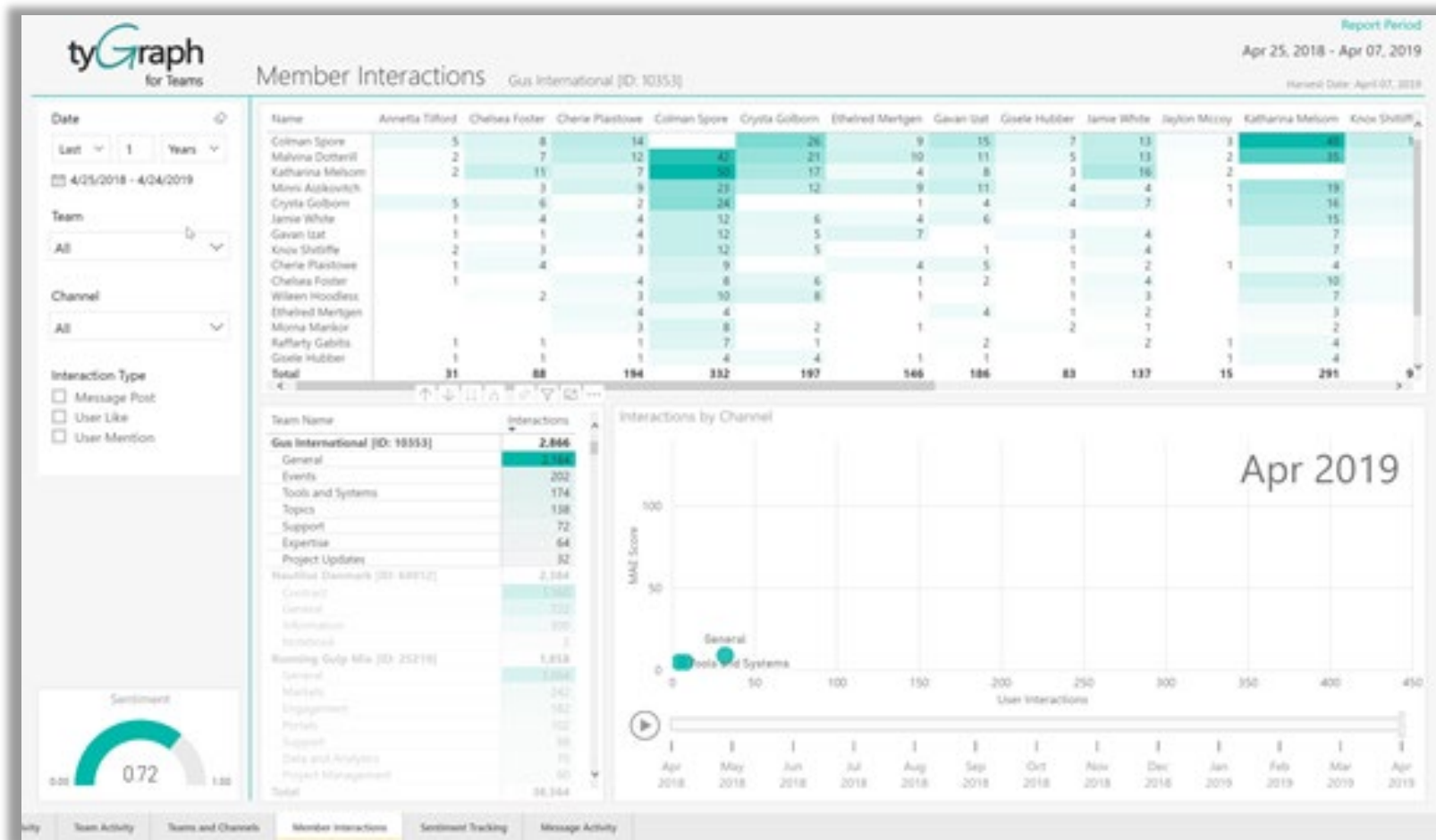
<https://docs.microsoft.com/en-gb/microsoft-365/admin/productivity/productivity-score?view=o365-worldwide>

MICROSOFT 365 ANALYTICS – USAGE

- Exchange
- Forms
- Forms Pro
- Microsoft Teams
- Office 365
- OneDrive
- SharePoint
- Skype for Business
- Yammer



TYGRAPH

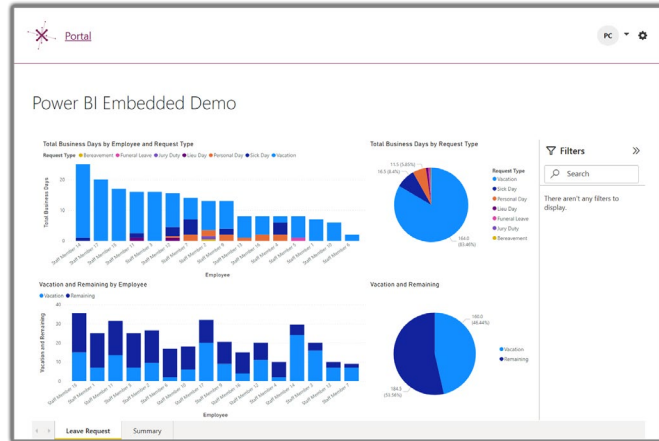


Actionable analytics for Microsoft 365

WRAP UP POINTS

- Still On-Premises? Clock is Ticking
- Consider a Road Map / Prototype Exercise
- Migration Time is Time for Some House Cleaning
- “Teams First” Approach To Building Modern IA
- Sites, Templates, Permissions – Consistency is Key
- Change Mangement

UPCOMING EVENTS



Deploy Power BI Dashboards Internally and Externally without User Licensing

March 22, 2022
12 – 1 PM EST

The banner for the Microsoft 365 Conference features a dark purple background with a network-like pattern. At the top, it says "Microsoft 365 CONFERENCE" and lists associated technologies: "Microsoft Viva", "Microsoft Teams", "Microsoft SharePoint", and "Microsoft Power Platform". It also mentions "CO PRODUCED BY MICROSOFT AND M365 CONFERENCE". The dates "APRIL 5-7 LAS VEGAS, NV" are displayed in a purple box. A photo of Peter Carson, President of Envisionit, is shown on the left. To his right, the text reads "SPEAKER Peter Carson, President, Envisionit". A code "CARSON" is provided for a "\$50 OFF REGISTRATION". At the bottom, it says "REGISTER TODAY! LIMITED CAPACITY" and provides contact information: "MGM Grand Las Vegas, NV", "M365Conf.com", and "203-527-4160".

Microsoft 365 Conference: Teams and Microsoft 365 External Users - Unstructured and Structured

April 6, 2022
12:15 – 1:15 PM PST

All Upcoming Events

QUESTIONS & NEXT STEPS

THANK YOU!