TEAMS FIRST APPROACH TO FILE SHARE AND SHAREPOINT MIGRATIONS

March 1, 2022
12 – 1 PM EST

envision IT

PETER CARSON

- President, Envision IT
- Office Apps and Services MVP
- peter@envisionit.com
- blog.petercarson.ca
- twitter.com/carsonpeter
- President Toronto SharePoint User Group

LOGAN GUEST

- Sales and Marketing Manager
- Point of contact for follow ups
- lguest@envisionit.com
- 647-265-8256

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

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

IMPACT AWARDS Winner

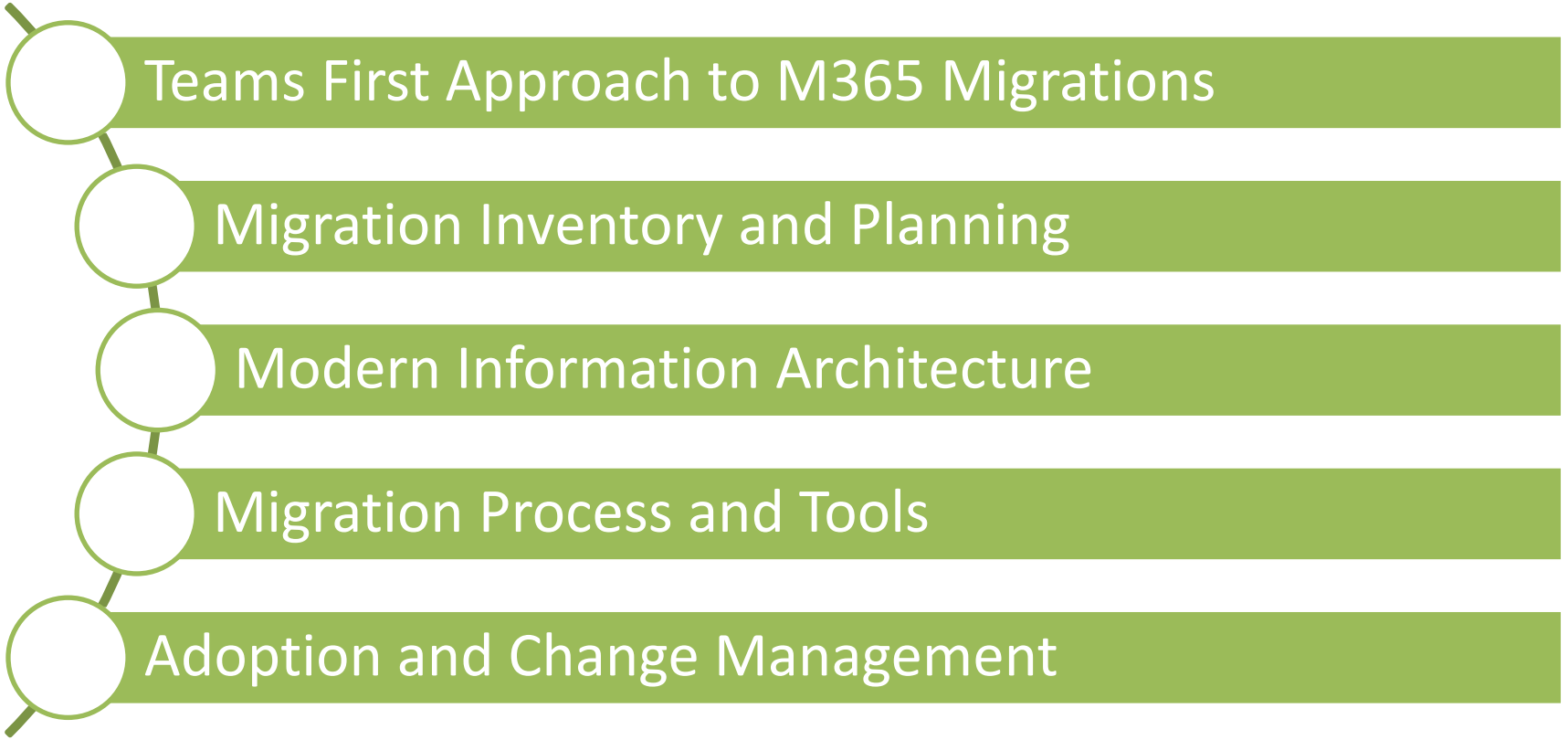
METALOGIX BEST OF BREED

IT SECURITY AWARDS

International Association of Microsoft Channel Partners™
Apps Development Partner Award 2015
WINNER - CANADA Region

CDN CHANNEL ELITE AWARDS 2017
SECURITY SOLUTION
SILVER WINNER

AGENDA


Teams First Approach to M365 Migrations
Migration Inventory and Planning
Modern Information Architecture
Migration Process and Tools
Adoption and Change Management

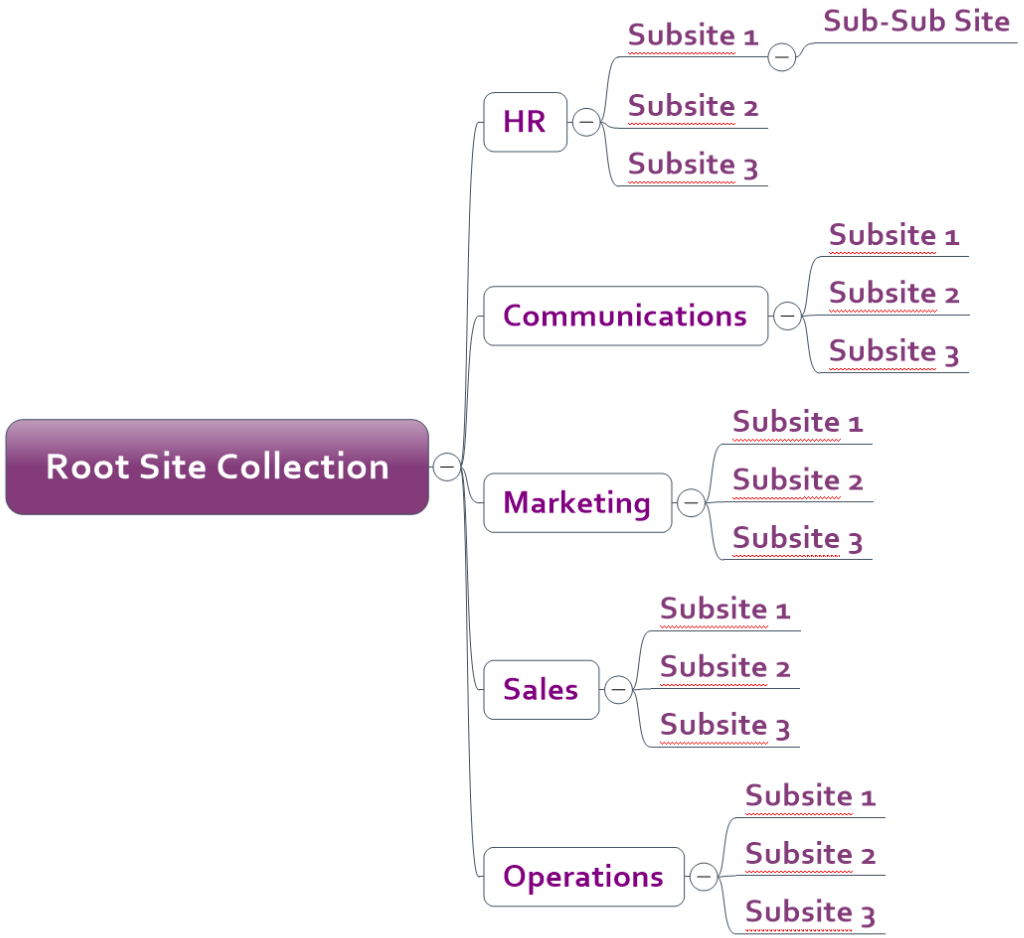
Types of Migrations

File Shares	SharePoint On-Premises	Legacy Records Management	SharePoint Online
• Multiple file shares • Departments, projects • Personal file shares	• Intranet • Collaboration, Team Sites • My Site • Deep subsite structure	• OpenText • FileNet • Content Manager	• 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?

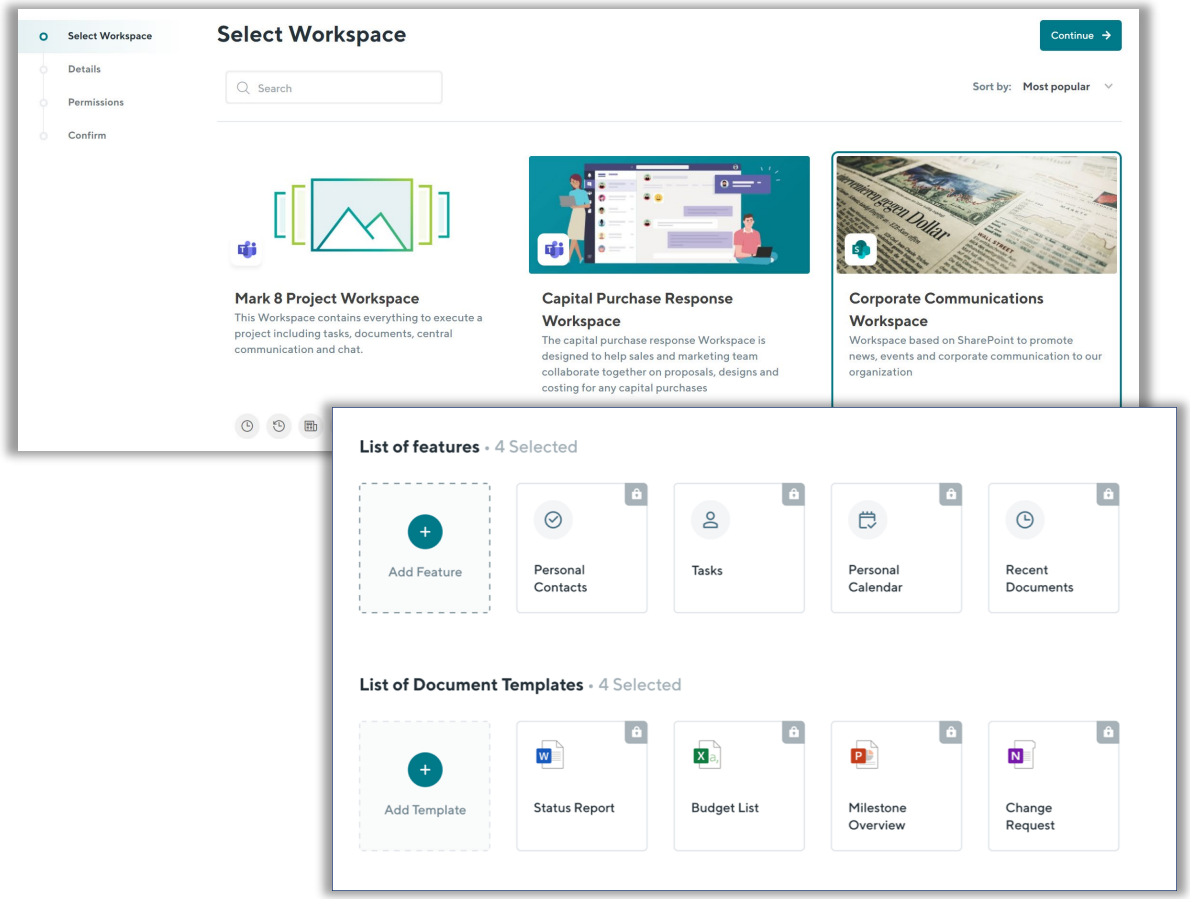
Team	Channel
Department	Sub-departments, projects, products, folders
Client	Project
Location	Project
Projects	
Initiatives	

FOLDERS, DOCUMENT SETS, AND METADATA

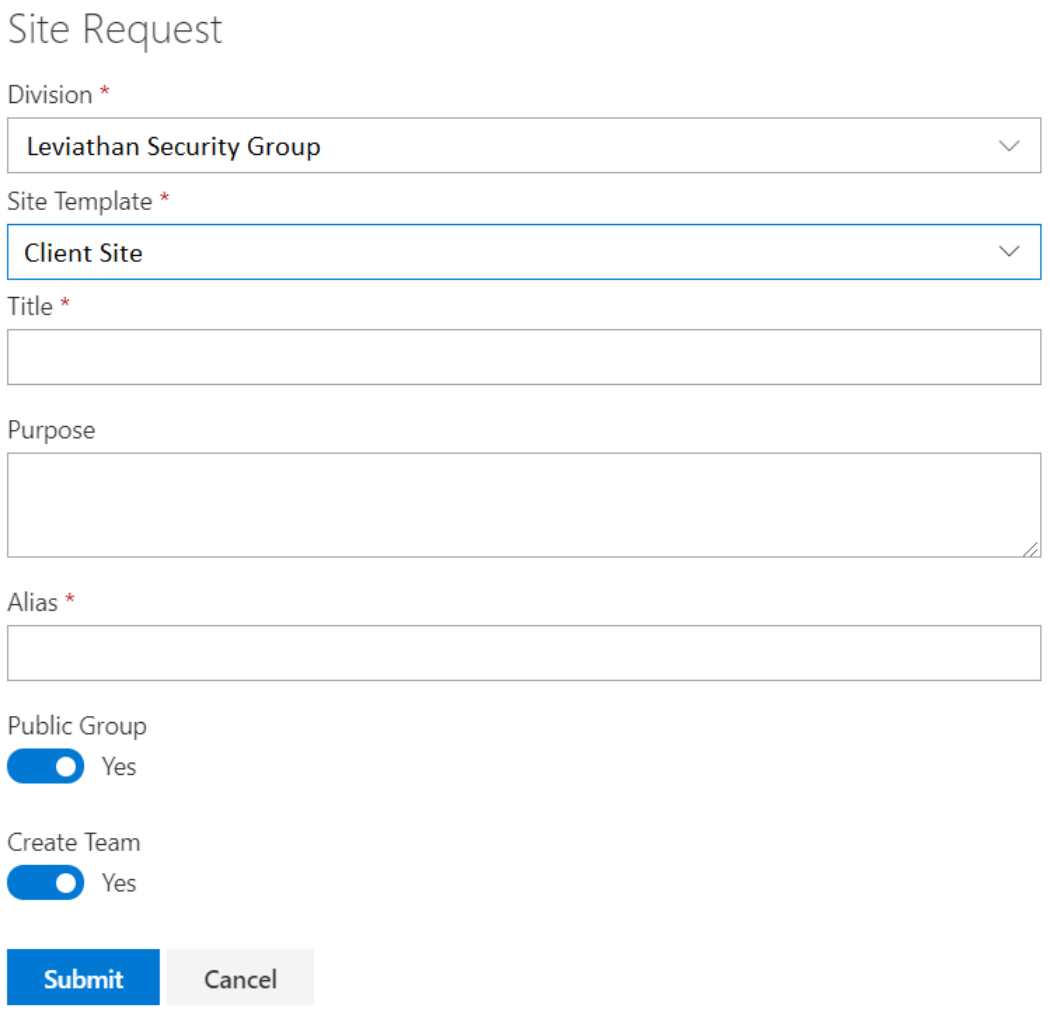
- Teams encourages folders
- Teams also now supports rich metadata and views
- Document sets can be used to simplify assigning metadata
- Additional metadata can be set at the document level
- Folders can still be used

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

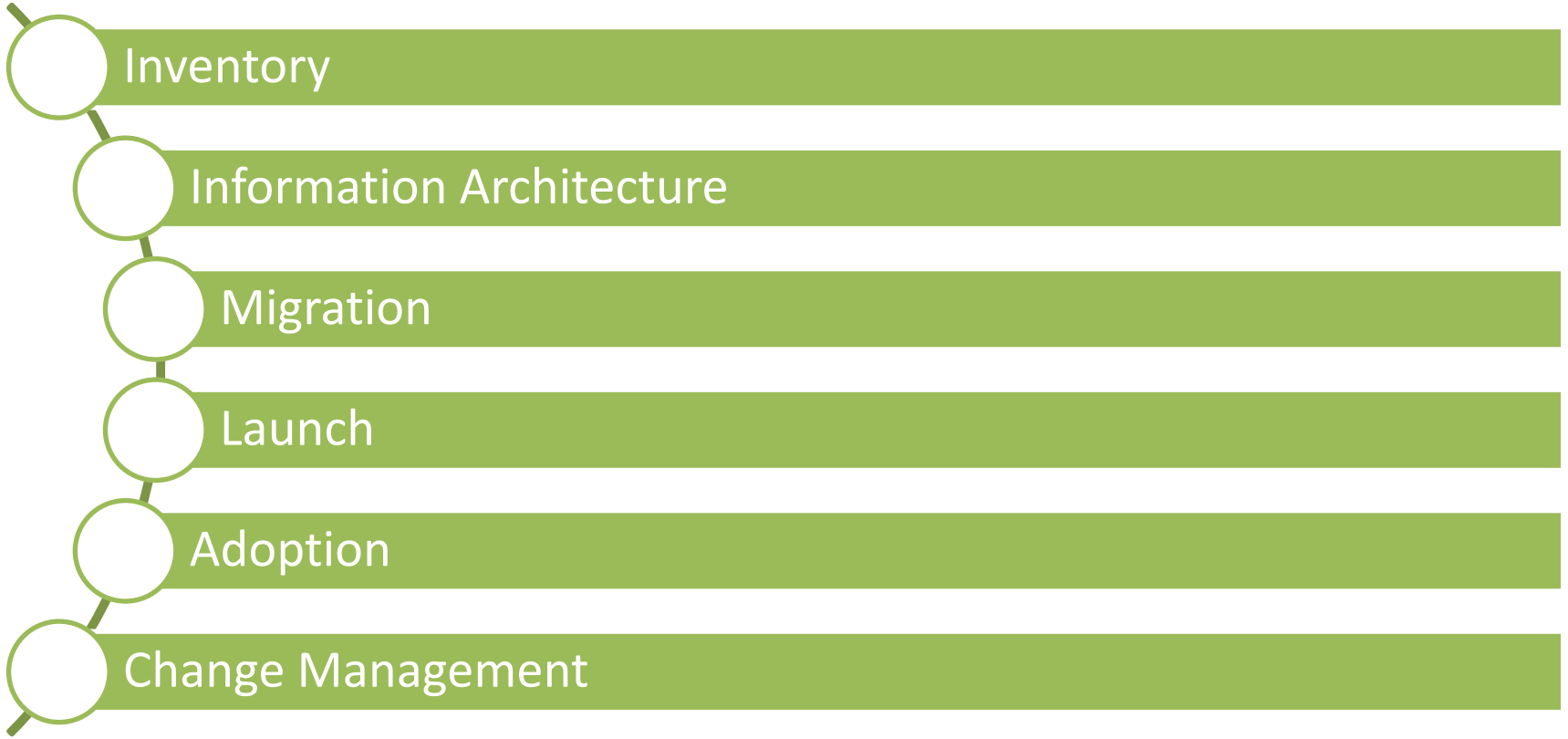


- Open Source Solution
- Effective governance to avoid site sprawl
- Intuitive form for creation of new Team site
- Logic App generates O365 Group
  - SharePoint Site including OneNote
  - Exchange calendar and mailbox
  - Microsoft Team
  - Optional Project (Channel)
- A-Z SPFx web part
- May be integrated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

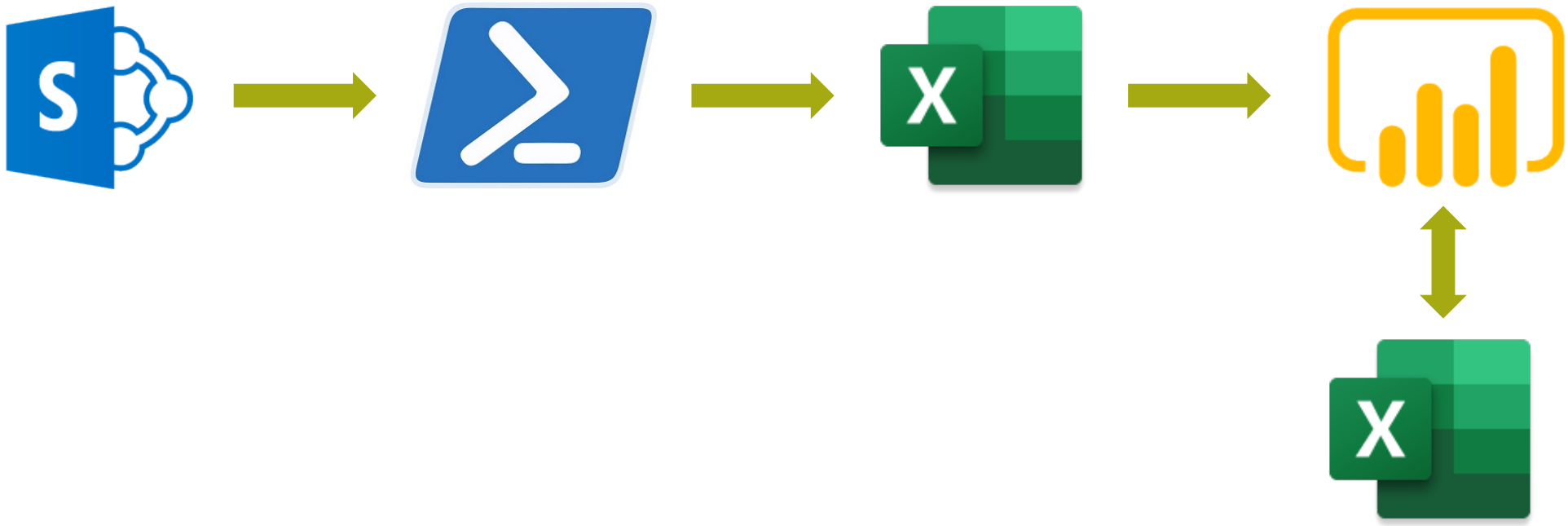
SHAREPOINT ONLINE MIGRATION

- 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

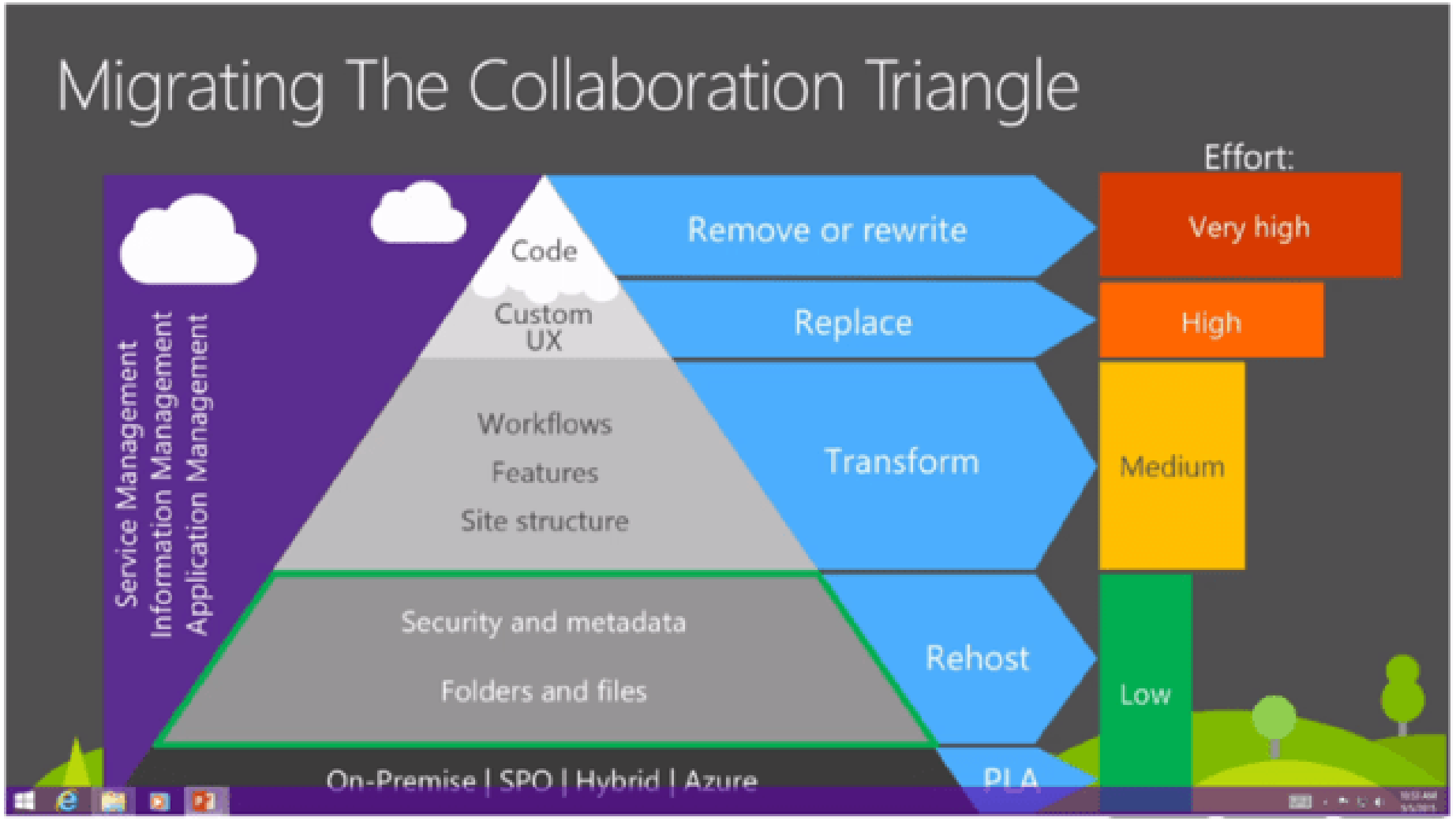
PRE-UPGRADE ASSESSMENT

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

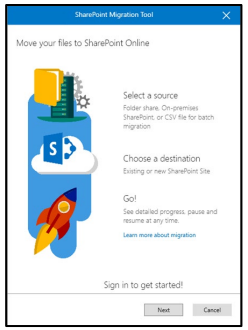


https://slideplayer.com/slide/13041452/

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

Xillio

Simple → **Complex**

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)

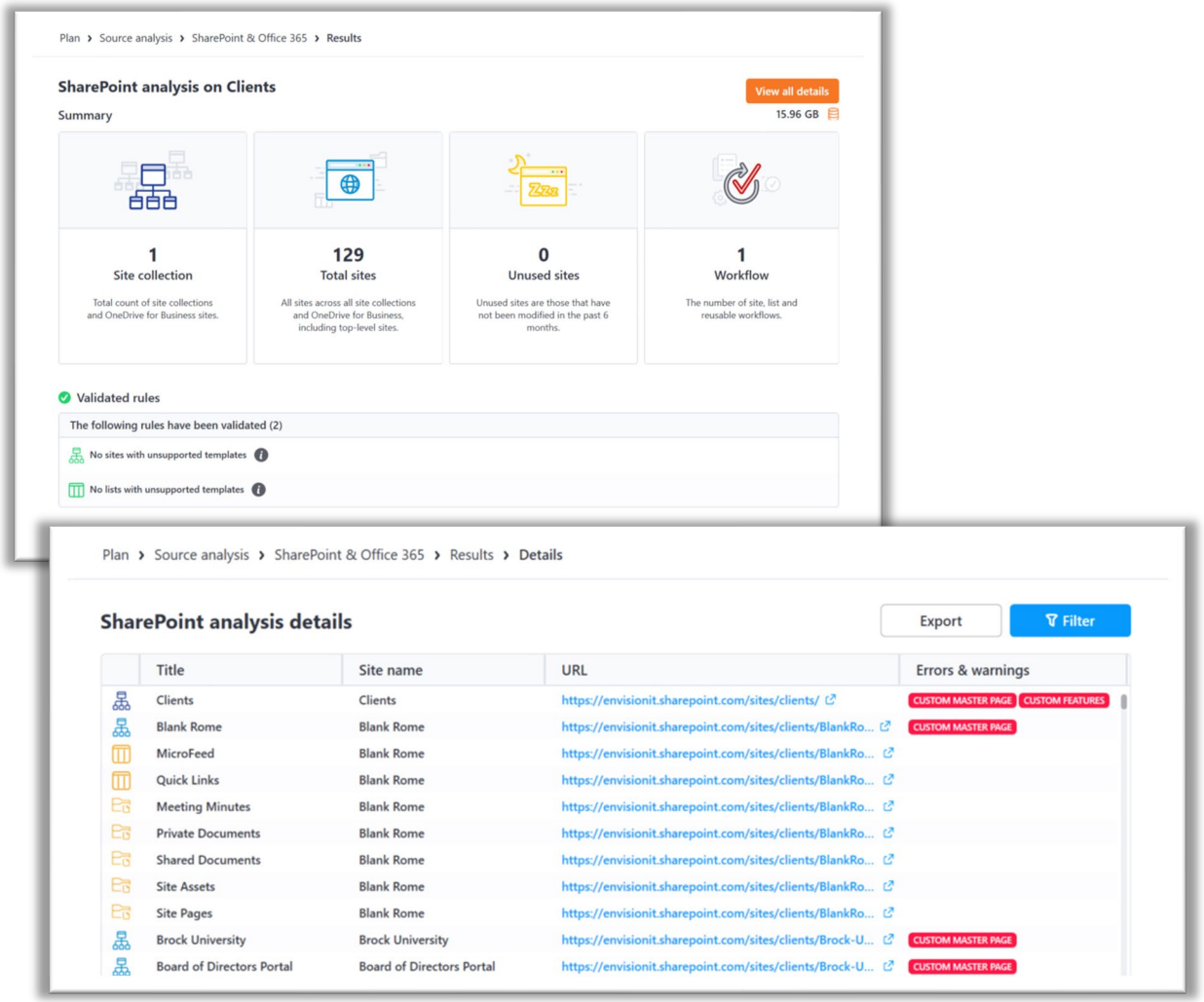
Site Collection Report	Permissions Matrix Report	Unused Site Report	Orphaned User Report
Audit Report	Checked out Documents Report	External User Report	Lists with Workflow Report
Site Report	Sites with Custom Permissions Report	External Sharing Report	Workflow Report

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

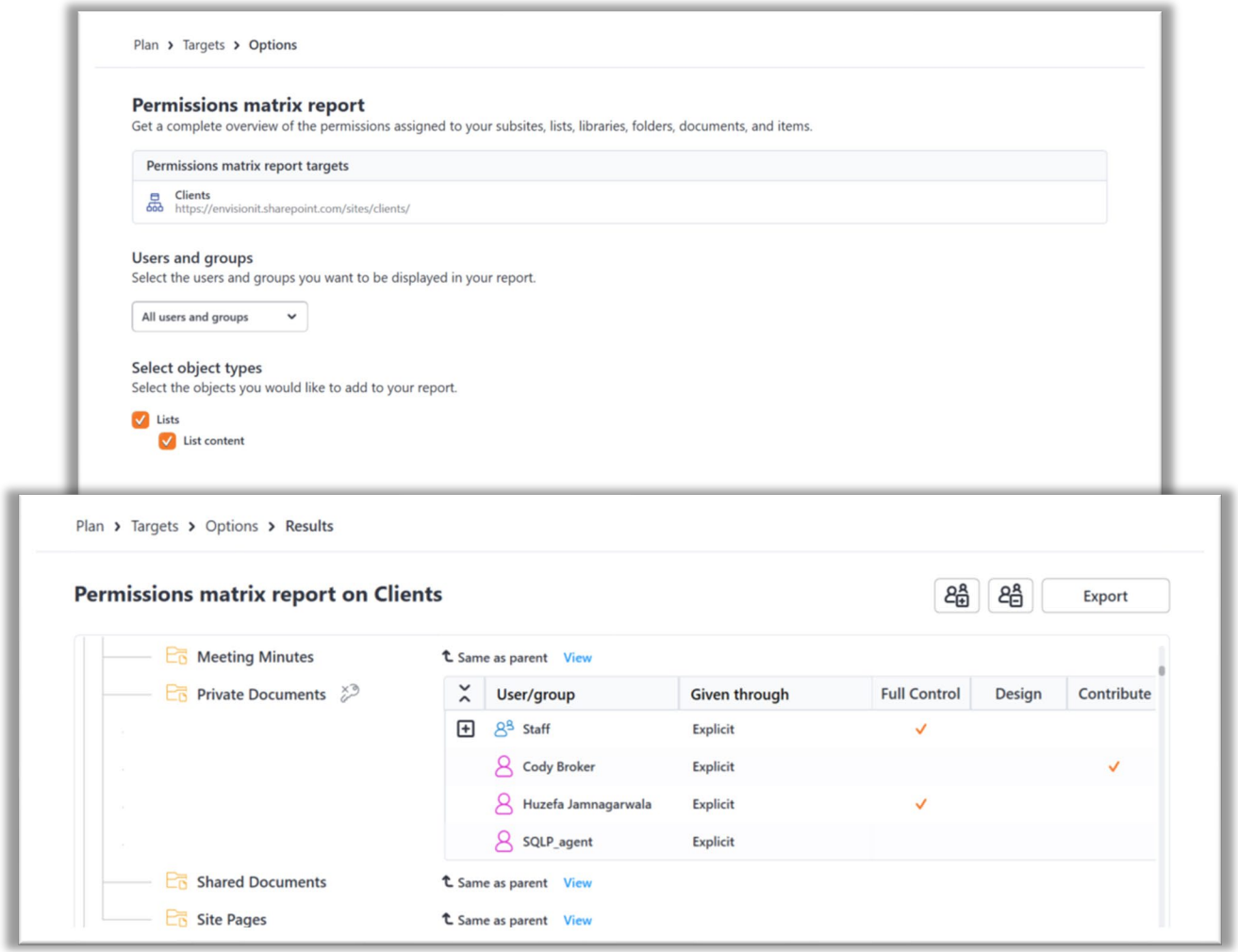
SHAREGATE – PLANNING REPORTS

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



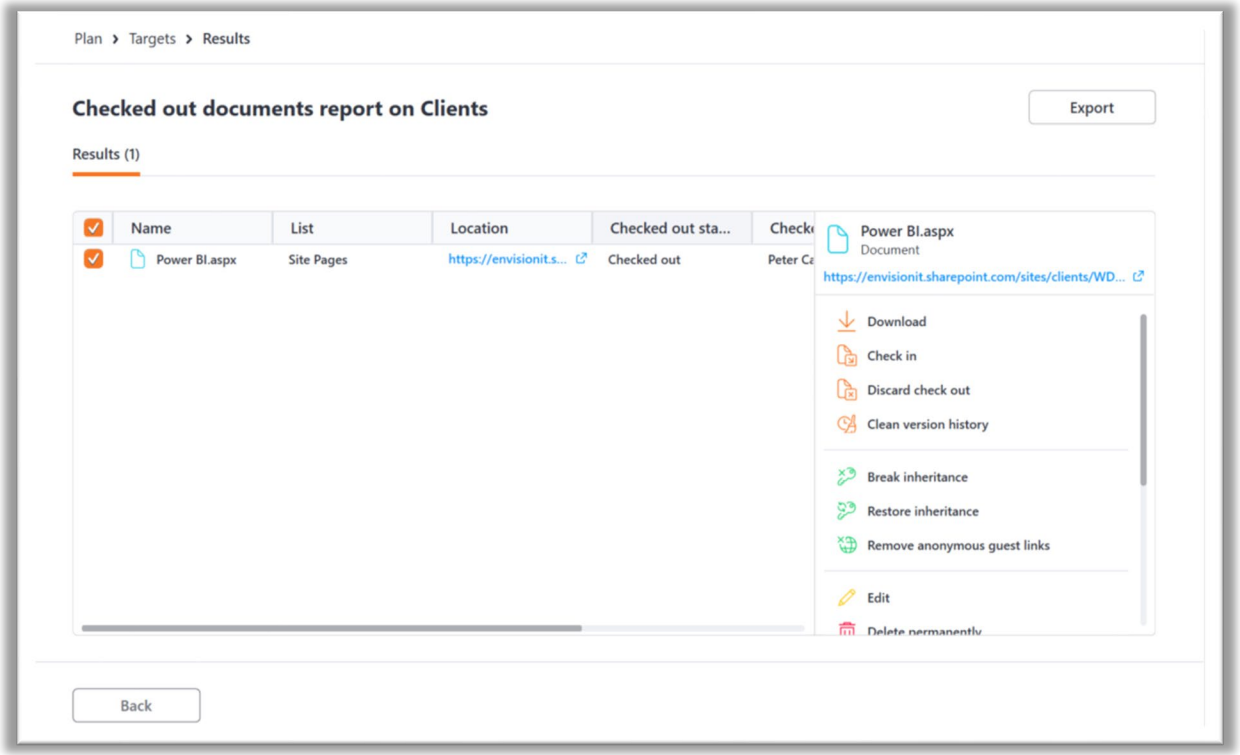
SHAREGATE – PLANNING REPORTS II

- 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



SHAREGATE - PLANNING REPORTS III

- Checked Out Files on a particular site collection or site



XILLIO

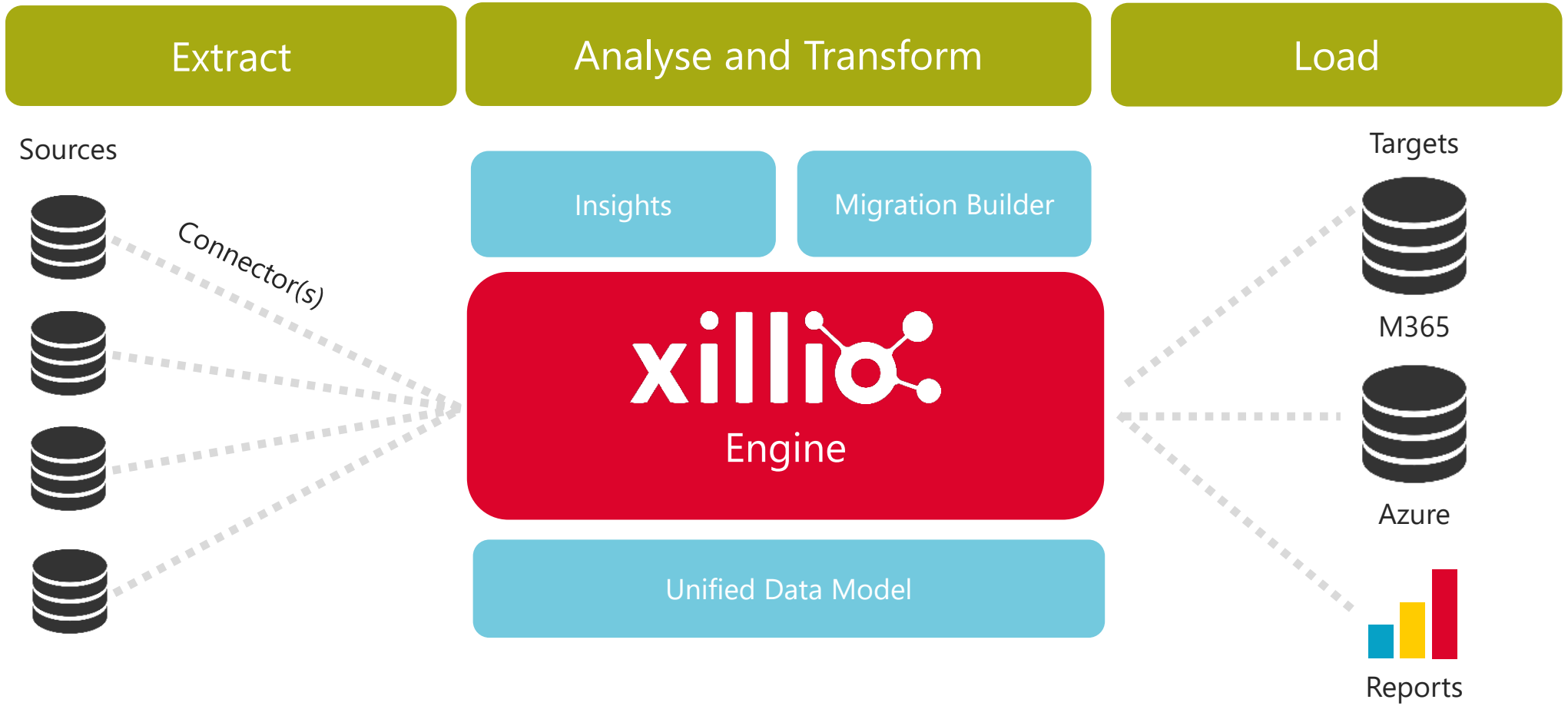
- Founded in 2004, focusing on complex content migrations since
- >2010 in-house developed migration software
- 60+ migration connectors
- 250+ migration clients
- Xillio USA office
- 2019 Microsoft Content Services Charter Partner
- 2021 Microsoft MISA partner
- Added 2 MVP's to consultancy staff in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

xillio

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

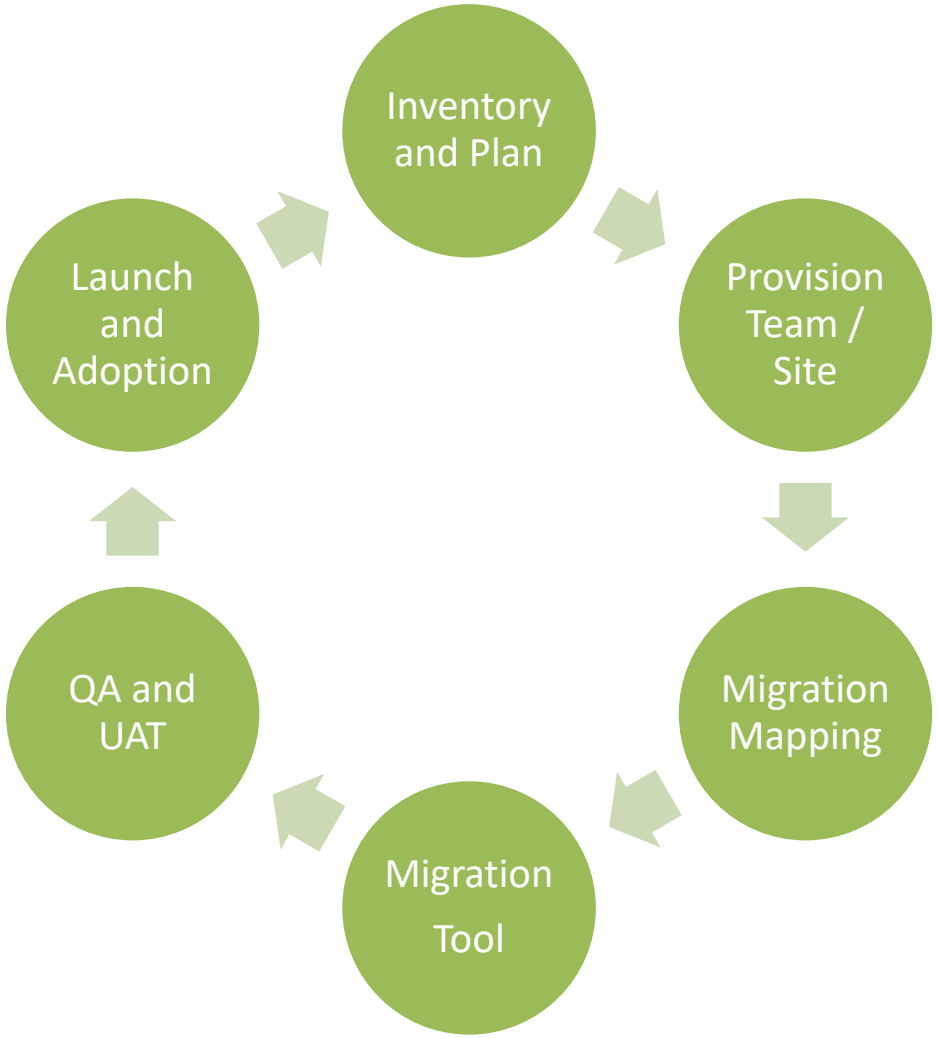
XILLIO MIGRATION PLATFORM



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

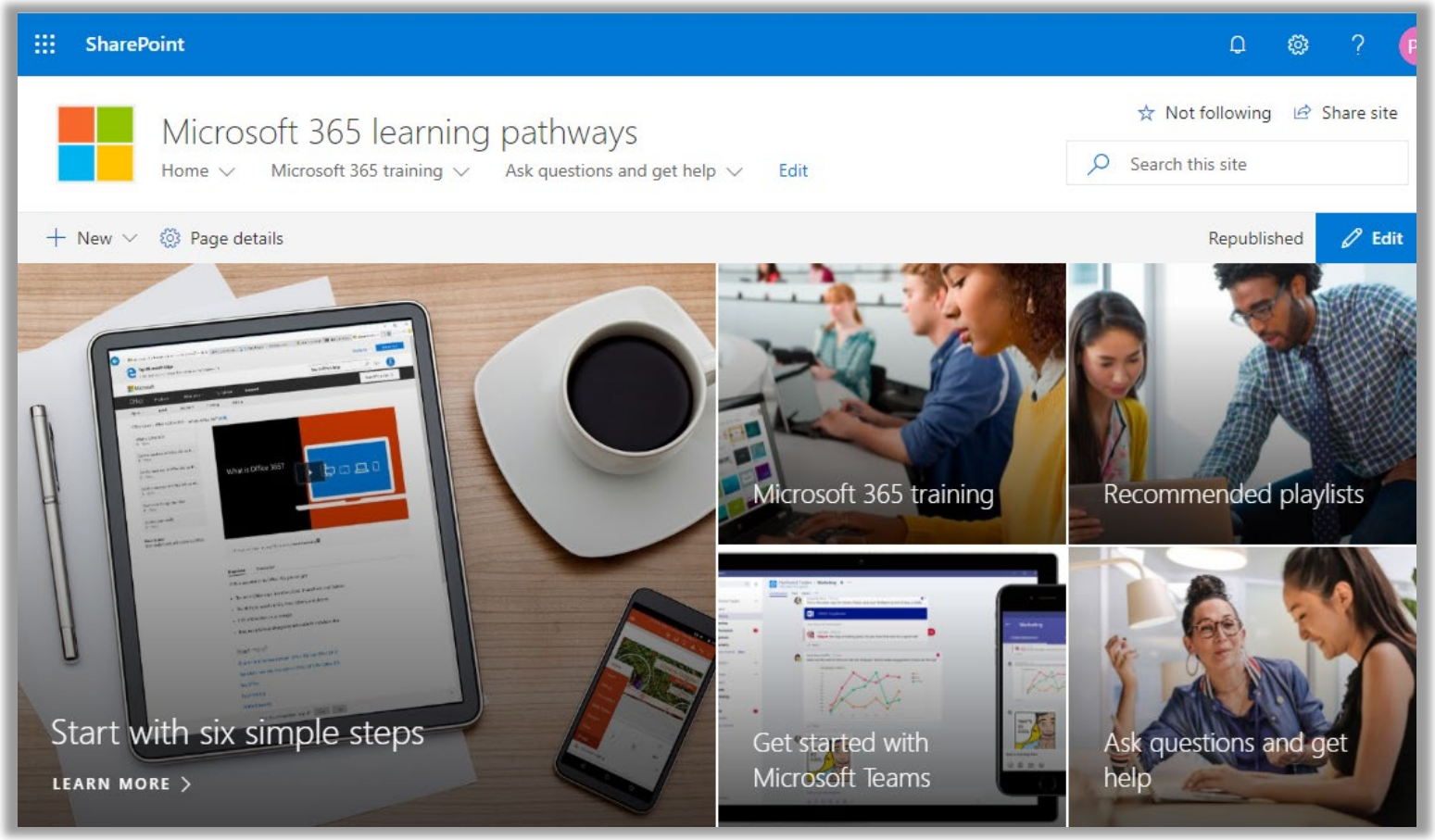
TRAINING STRATEGY AND OPTIONS

Technical	End-User	Knowledge Transfer Session	Custom Options
• Recommend official Microsoft Curriculum course delivered by 3rd parties	• Teams for End Users • Collaboration for Site Members • Collaboration for Site Owners	• Ad-hoc sessions • Custom sessions on site configuration	• Custom training guides • Lunch and Learns • Quick Reference Cards

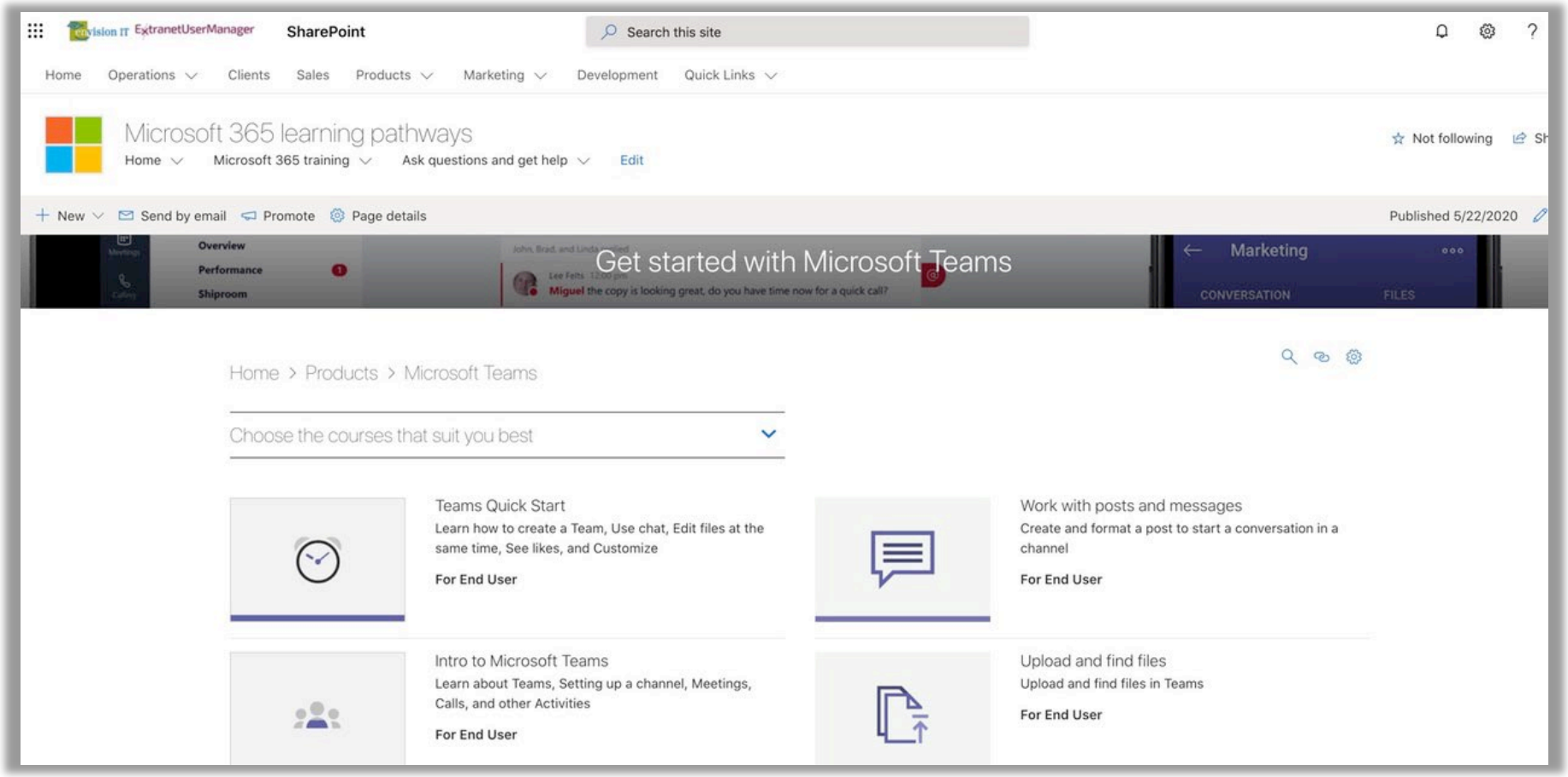
- ✓ Hands-on train-the-trainer sessions
- ✓ Guides or PowerPoint decks provided
- ✓ Course design and schedule that fits your organization

LEARNING PATHWAYS

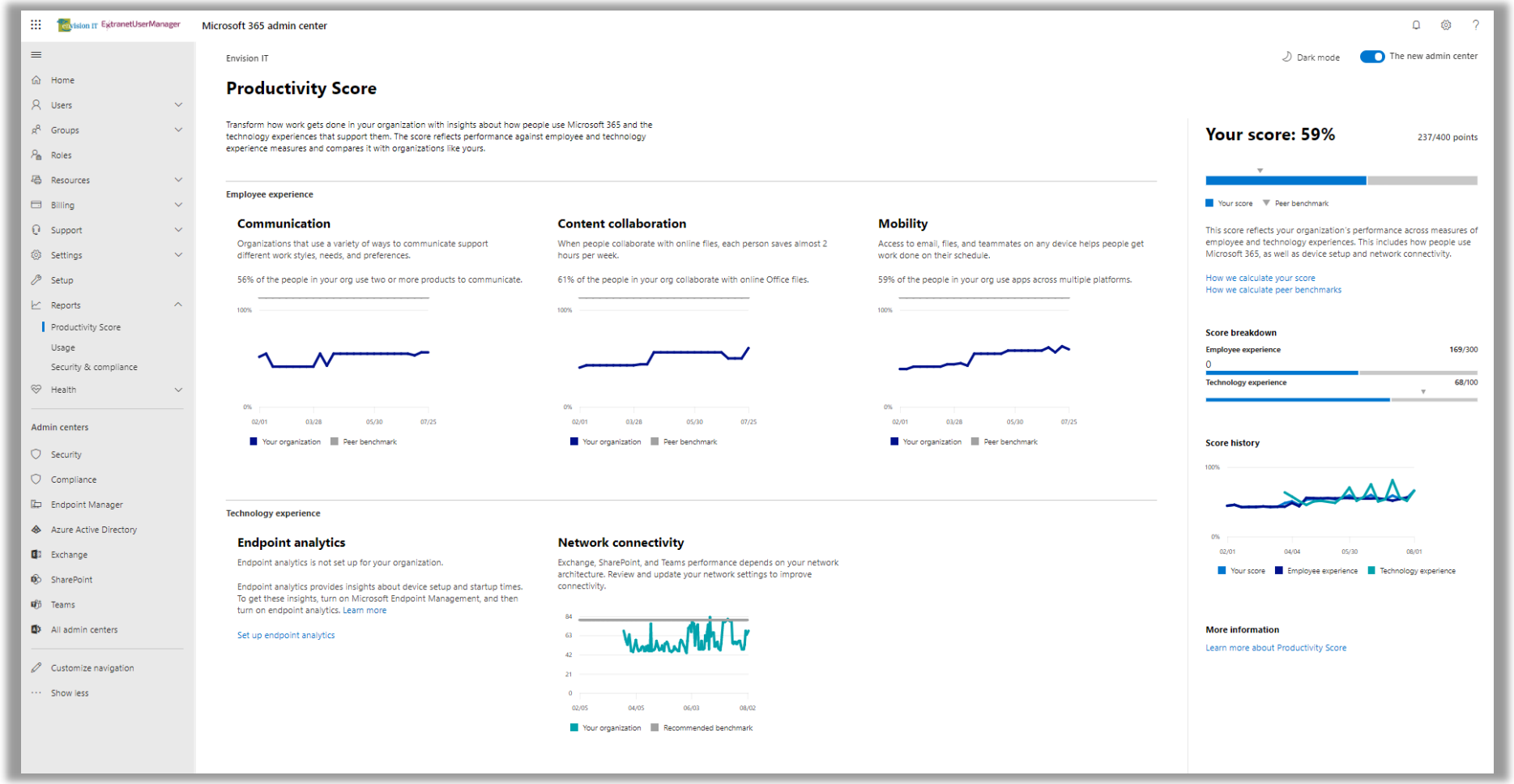
- Collection of online training videos and quick help
- Not just for Teams, much of Microsoft 365
- Customizable
- Future friendly



LEARNING PATHWAYS – MICROSOFT TEAMS



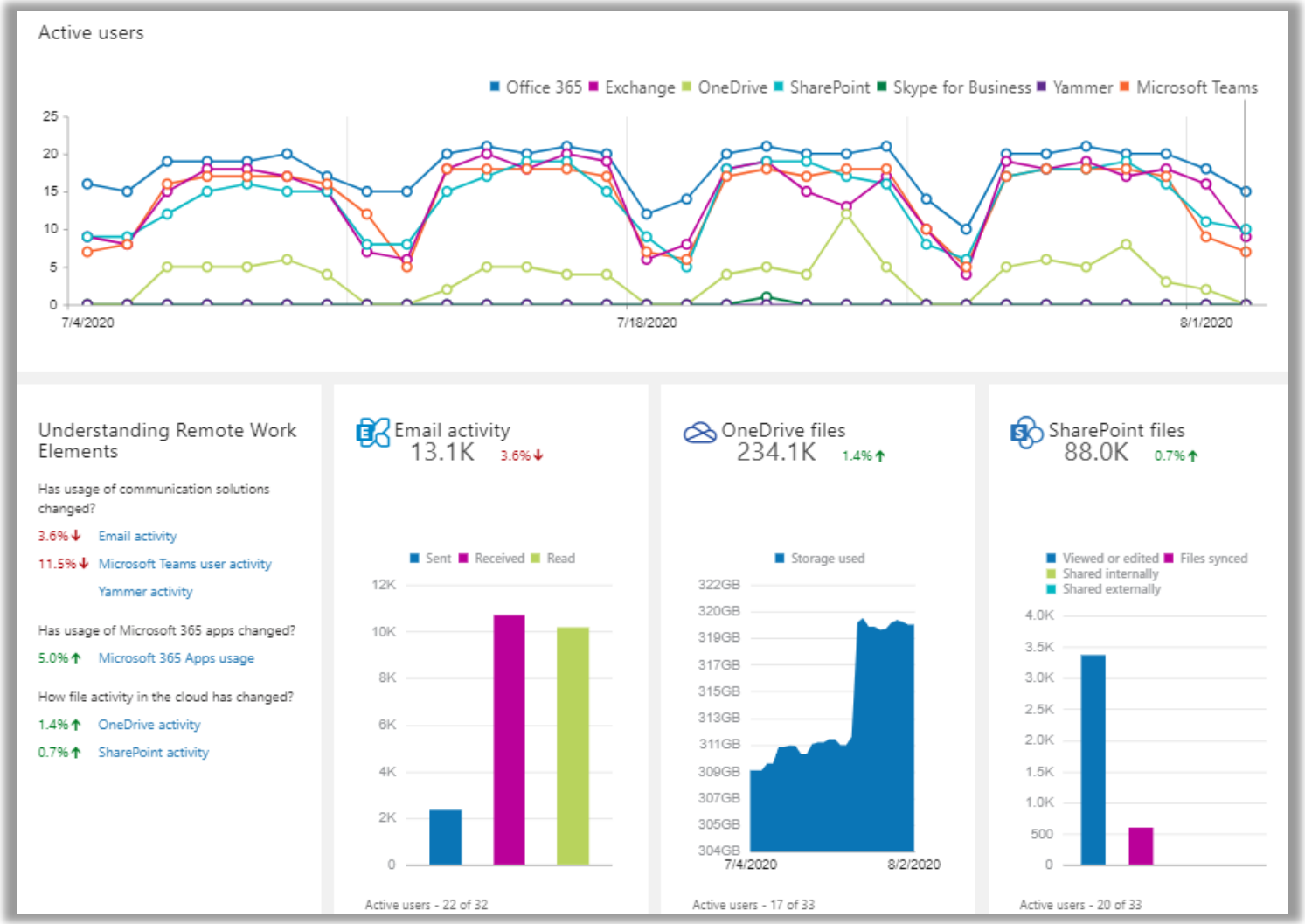
MICROSOFT 365 ANALYTICS – PRODUCTIVITY SCORE



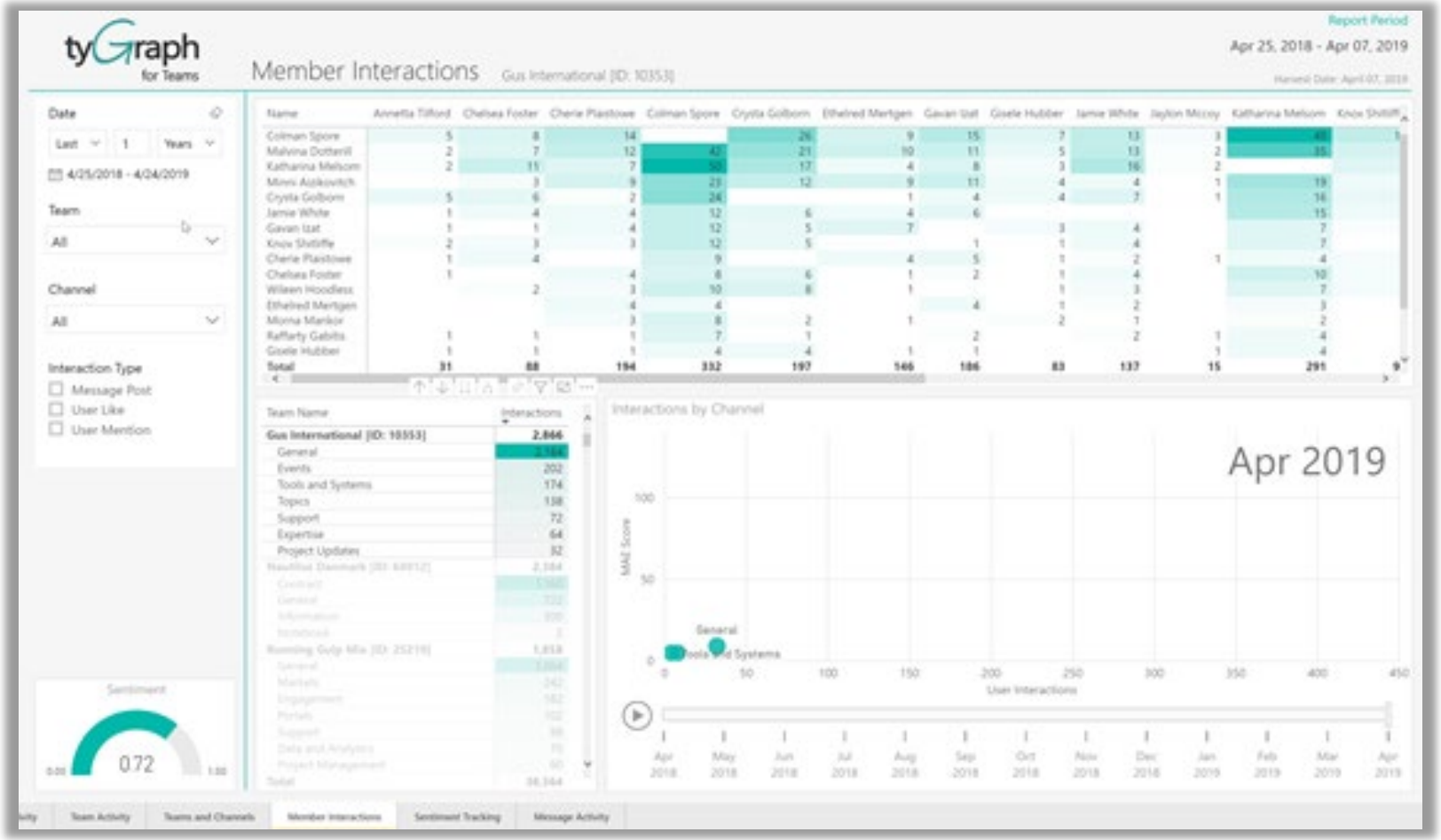
https://docs.microsoft.com/en-gb/microsoft-365/admin/productivity/productivity-score?view=o365-worldwide

MICROSOFT 365 ANALYTICS – USAGE

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

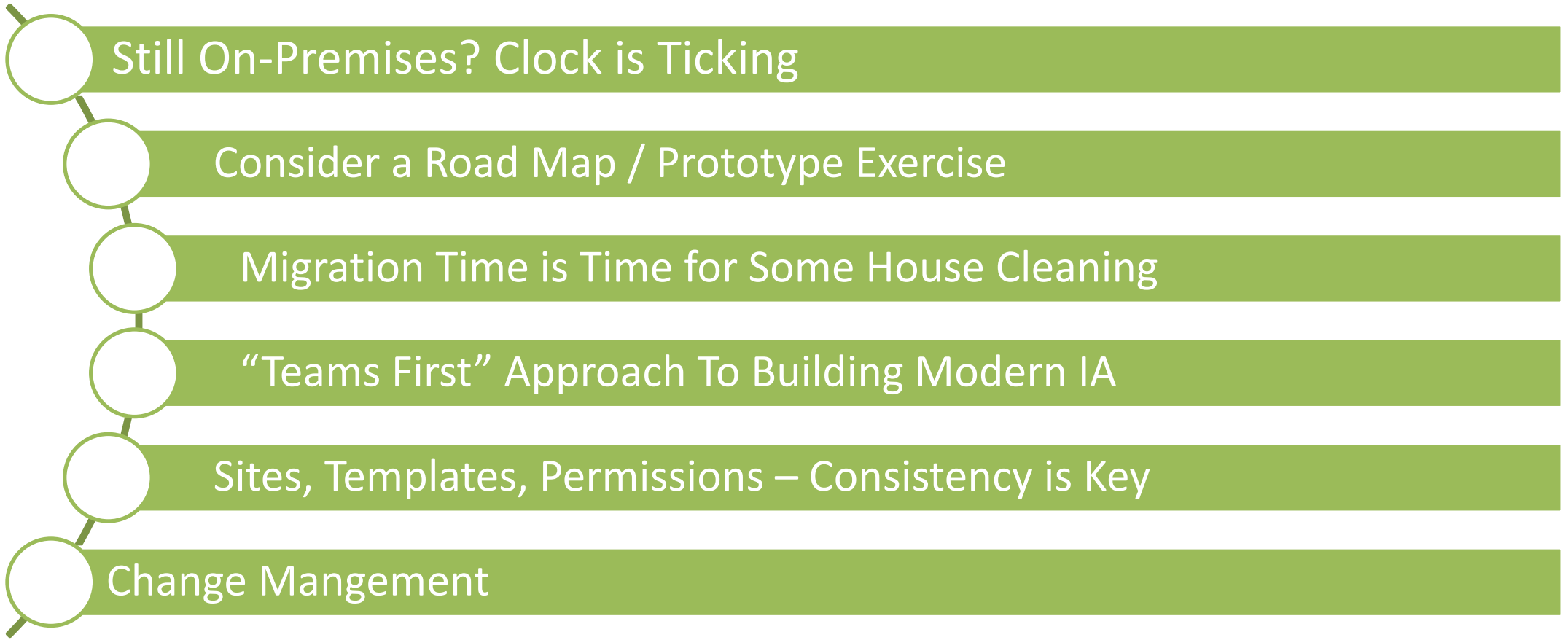


TYGRAPH

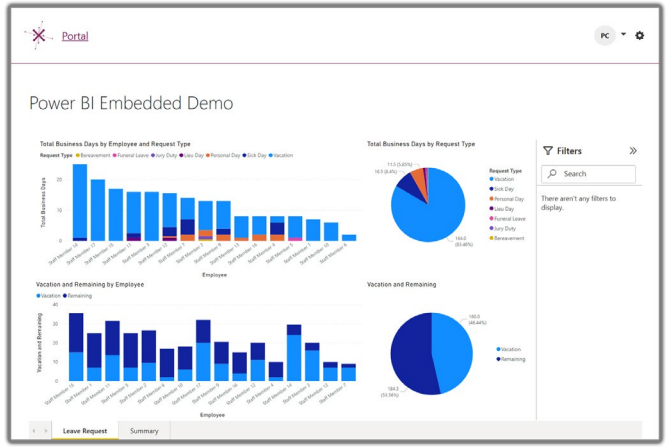


Actionable analytics for Microsoft 365

WRAP UP POINTS



UPCOMING EVENTS



[Deploy Power BI Dashboards Internally and Externally without User Licensing]

March 22, 2022
12 – 1 PM EST

[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!