

Effortless Document Migration From File Servers to SharePoint

Solutions for Success Education Series

Solutions for **Success**



POINT ALLIANCE

Agenda

- About Point Alliance
- Are you ready to retire your file server
- Which App When
- Migration Approaches
- Meta Tags & Directory Structure
- Best Practices
- Data Sensitivity & Retention
- User Training



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Point Alliance

- Microsoft Solutions Partner
 - Modern Work
 - Security
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- Microsoft Gold Partner with 11 Competencies (legacy)
- 100% Microsoft Certified Team
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**Are you ready to
retire your file
server?**

Why should I migrate?

- One of the main reasons to retire a file server is to take advantage of the benefits of cloud-based storage and collaboration tools, such as Microsoft Teams, OneDrive, or SharePoint. These cloud-based tools offer features such as real-time collaboration, version control, and secure sharing of files, making it easier for teams to work together on projects and collaborate remotely.

Scalable & Flexible

- In addition, moving to the cloud can provide a more scalable and flexible storage solution, eliminating the need for costly hardware upgrades and maintenance. This can result in cost savings for organizations and enable them to allocate resources more efficiently.

Data Security

- Another reason to retire a file server is to improve data security. Cloud storage solutions often offer more advanced security features than on-premises file servers, including data encryption, multi-factor authentication, and advanced threat protection. These security features help to safeguard the organization's data against potential threats such as cyberattacks or data breaches.

Where do I move the files to?

- What to think about when moving your data to SharePoint, Teams, and OneDrive for Business



Just me



Me and my team



The wider organisation

OneDrive Migration

Migrating a personal drive to OneDrive is a relatively straightforward process, but there are some important steps you should take to ensure a successful migration. Here's a general outline of the process:

1. Clean up your personal drive
2. Set up OneDrive
3. Sync your personal drive to OneDrive
4. Wait for the sync to complete
5. Verify the migration
6. Update links and references
7. Communicate with others

Teams Migration

- Migrating a file server to Microsoft Teams can be a complex process, but there are several steps you can follow to ensure a successful migration. Here is a general outline of the steps you can take:
 1. Identify the files and folders to migrate
 2. Set up a Microsoft Teams site
 3. Plan the migration
 4. Migrate the data
 5. Validate the migration
 6. Train users

SharePoint Migration

Migrating a file server to SharePoint can be a complex process, but there are several steps you can take to make it as smooth as possible. Here's a general outline of the process:

1. Plan the migration
2. Prepare the file server
3. Set up SharePoint
4. Migrate the files
5. Update links and references
6. Communicate with users
7. Monitor and maintain

Meta Tags vs Directory Structure

- SharePoint meta tags and directory structure serve different purposes in organizing and managing content within a SharePoint site.

Directory Structure

- A directory structure refers to the hierarchical organization of folders and subfolders within a file system. In SharePoint, this would translate to the use of sites, libraries and folders to organize content. For example, you might have a library for documents and subfolders within that library for specific types of documents or for documents related to particular projects or departments.

Meta Tags

- Meta tags, on the other hand, are descriptive labels or keywords that are associated with a specific piece of content. These tags can be used to help users find and filter content, regardless of its location within the site's directory structure. For example, you might add meta tags to a document to indicate its topic, author, or status.

Meta Tags vs Directory Structure

- In some cases, it may be more efficient to use meta tags instead of a complex directory structure. This can be particularly helpful if you have a large amount of content that is difficult to organize into clear categories. Using meta tags allows users to easily find content by searching for specific keywords, without having to navigate through a complicated folder structure.
- Ultimately, the choice between using a directory structure or meta tags (or both) will depend on the specific needs of your organization and the type of content you are managing. In some cases, a combination of both may be the most effective approach.

High Level Best Practices

- Review/cleanup file server files (archive)
- Establish content owners
- Determine security requirements
- Create new site/library structure (with appropriate group security)
- Use Microsoft Migration tool to map and migrate files/folders to SharePoint, Teams and OneDrive
- Train users
- Leverage enhanced SharePoint features

Data Sensitivity & Retention

- Data Sensitivity Labelling
 - Example – Internal, Confidential, Strictly Confidential
 - Categorization
 - Tracking
 - Encrypting
- Data Retention Labelling
 - Retention schedules
 - Retention compliance
 - Data archiving

User Training

- Make sure that users are comfortable with the tools
- Have the right structure setup so that if users put documents in the right places, the right security gets applied
- Don't require users to apply too many tags to documents
- Change how users start to create documents (i.e. within the library that they want the document saved)
- No more emailing of attachments with internal emails

Upcoming Events

Upcoming S4S Webinars

- Third Tuesday of Each Month
- pointalliance.com/events

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