SharePoint Online
Setting site up for S drive data

Establishing team site locations and managing
shared drive data file conversions and migration

8-18-2015

Introduction

This storyboard is designed to guide a department SharePoint Team site site owners to set up the site to receive files from and to migrate that data from server based folders to SharePoint online.

This is critical as the traditional 'S' and "V' and 'U' drives are not visible from the Office 365 online applications.

In this story board you will:
- Create a sub site in your department team site
- Configure a library to receive data from shared drives
- Convert data to be moved as required
- Move data (either in bulk or a file at a time)

Note: Related administrative functions are covered in other storyboards

Information Management

Office 365 online only versions of the Word, Excel and PowerPoint products look to cloud based areas for storage such as OneDrive and SharePoint and are unable to access either the computer desktop 'C' drive or local server based 'S', 'V' and 'U' drives.

The OneDrive for Business desktop agent coupled with the OneDrive cloud enables staff to move files from the desktop 'C' drive and 'U' drives into the cloud. Once in OneDrive cloud the files can be used by the Office 365 online-only versions of Word, Excel and PowerPoint.

Using the SharePoint 2013 online version, department team sites coupled with libraries and sub sites enables department team site owners to create and manage the environments needed to reconcile the 'S', 'U' and 'V' or other drives they may use.

Storyboards

To perform these actions you need to have 'site owner' permissions

Storyboards

What	How
• Establish place to hold data from servers	• SB1-1 – Create Sub site
• Create Libraries to hold data	• SB1-2 – Create library
• Add metadata column to library	• SB1-3 – Add columns using site properties
	• SB1-4 – Add columns using Quick Edit
• Convert data to be loaded	• SB1-5 – Convert data (instructions)
• Migrate data from server to SharePoint online	• SB1-6 – Bulk Data upload (Open in Explorer)
	• SB1-7 – Individual file upload

SB1-1
Creating a sub-site

In this section of the storyboard the team site owner will be guided through the process of creating a team sub site. They will start at the root team site for the department and then create a team sub site named 'EOC'.

SB1 - 1 - Start - Root Level Team Site

Base Team Site

Every team site has a root level home screen. In those departments which use team sites in their activities, this area of the SharePoint site will have many additional items placed by the department staff managing the site.

SB1 – 1 - Selecting path to create team sub-site 1 of 2

(1) Select the **gear** here

(2) Select **site contents** here

In this part of the storyboard we are going to create a team sub site. This is a common activity with team sites as the various operating units within a department often want to have their own team site workspace or sub-site.

(1) Select the **new subsite** option the create sub site process is triggered

The site content screen enables staff to create new sub-sites and libraries within sites.

This time we are creating a sub-site but in another storyboard this screen will be displayed during the process to create a site library.

Office of Emergency Management and Homeland Security ✏ EDIT LINKS

Site Contents › New SharePoint Site

Home
Notebook
Documents
Site Contents
Recycle Bin

✏ EDIT LINKS

Title and Description

Title:
EOC

Description:
Emergency Operations Center

Web Site Address

URL name:
https://mcgov.sharepoint.com/teams/OEMHS/ EOC

Template Selection

Select a language:
English

Select a template:
Collaboration | Enterprise | Duet Enterprise
Team Site
Blog
Project Site
Community Site

A place to work together with a group of people.

(1) Sub site name entered

(2) Descriptive name of site

(3) Access Path

(4) Type of site

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SB1 – 1 - Create team sub-site – Filling out sub site particulars 2 of 2

Permissions

You can give permission to access your new site to the same users who have access to this parent site, or you can give permission to a unique set of users.

Note: If you select **Use same permissions as parent site**, one set of user permissions is shared by both sites. Consequently, you cannot change user permissions on your new site unless you are an administrator of this parent site.

User Permissions:
◉ Use same permissions as parent site
○ Use unique permissions

(5) Inherit security credentials from parent site or create their own specific site permissions

Navigation

Display this site on the Quick Launch of the parent site?
○ Yes   ◉ No

Display this site on the top link bar of the parent site?
◉ Yes   ○ No

Navigation Inheritance

Use the top link bar from the parent site?
○ Yes   ◉ No

(6) Once the particulars are filled out staff would select the **Create** button to create the sub site.

[Create]   [Cancel]

SB1 – 1 - Create team sub-site – home page of new sub-site

Once the EOC team sub site has been created it will open to its home page

SB1-1a
Removing excess items from sub-site

As the sub site described in these storyboard is for replacement of selective server based drive storage they would not be built out like the departments main site.

As such the set of tool gadgets provided with the site can be removed to eliminate the extra items on the sub site home screen.
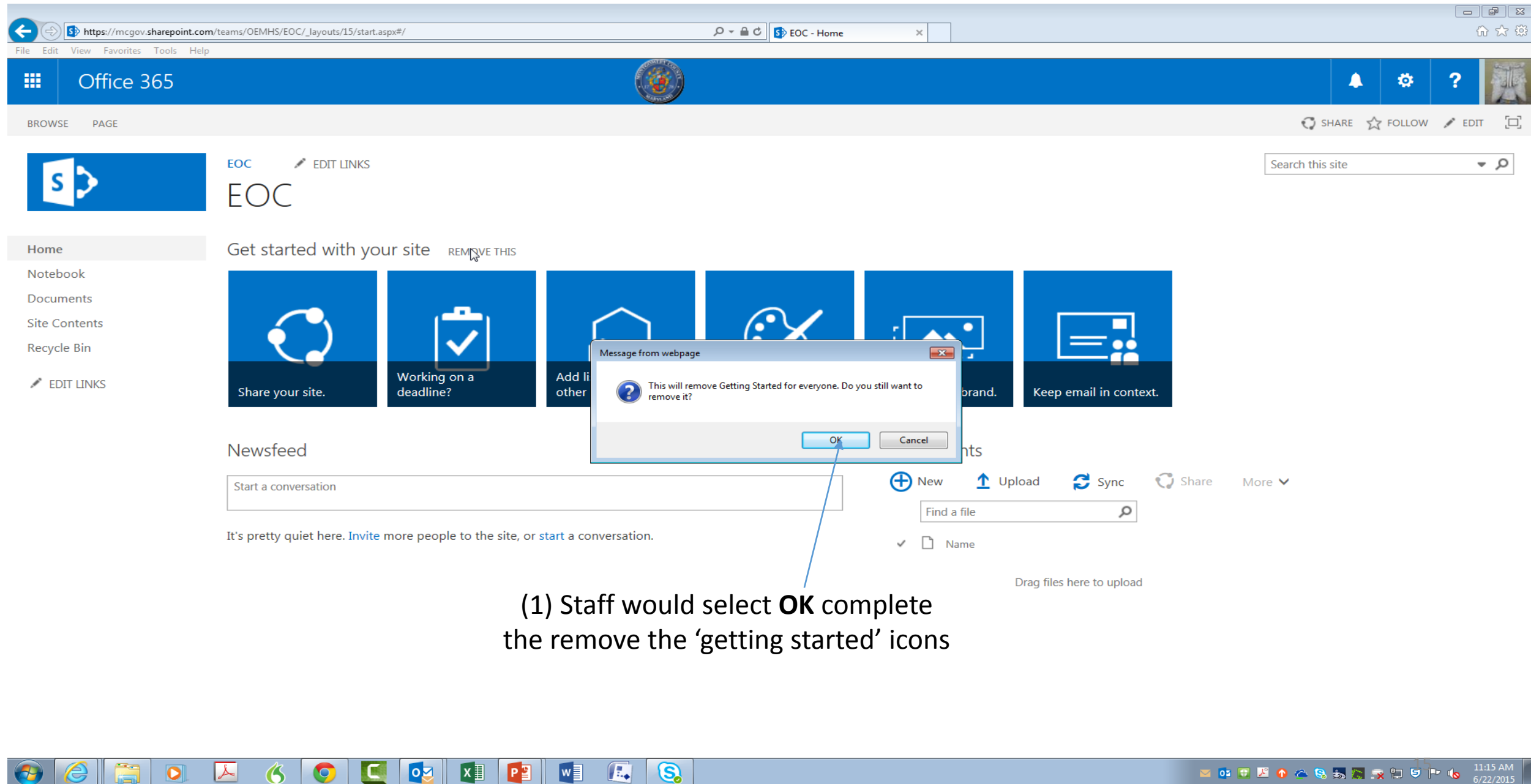
(1) Staff would select **OK** complete
the remove the 'getting started' icons

Team sub site after the changes

SB1 – 2
Creating libraries in a sub-site

In this section of the storyboard the team site owner will be guided through the process of creating libraries in the team sub site.

These libraries will be the places where the server based data will be migrated to after conversion (if needed)

SB1 – 2 - Creating Document Library – Home page of sub-site

The sub-site has a default document library which can be accessed via two ways.

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(1) At the home page of the sub site the staff would select the **gear** (options) symbol.

(2) They would then select '**Site Contents**' option

There are times when additional libraries are needed.

These could include documents of differing levels of security and requiring different access permissions, or those that represent a category of files such as 'S' drive

(1) Select **add an app** – to open the create library screens

The **Site Contents** screen is where staff would select whether to create a new subsite or a library. In this case we are creating a new library.

Once the team site owner arrives at the **Your Apps** screen they can select from a variety of applications.

Be advised that some applications have a fee associated with them.

DTS will not pay for any additional app other than document library.

(1) Select the **Document Library** icon to go to the create library screens

(1) The staff member would name the library

(2) Once named they would select the **'Create'** button to finish the process

The new library will have a **new!** symbol next to it and is ready for use at this point.

Library created

Once the Library has been created the system will return the staff person to the **Site Contents** screen.

SB1 – 3

Add metadata column to the library (not required field)

(1) Select the library where the metadata column is to be added

(1) Once in the desired library select the **LIBRARY** tab

A ribbon of choices will appear.

(1) Select the **Library Settings** from this ribbon

Office 365

EOC   ✏ EDIT LINKS

Lib-1 no required fields › Settings

Home
Notebook
Documents
Recent
   Lib-2 required fields
   Lib-1 no required fields
Site Contents
Recycle Bin

✏ EDIT LINKS

List Information
Name: Lib-1 no required fields
Web Address: https://mcgov.sharepoint.com/teams/OEMHS/EOC/Lib1 no required fields/Forms/AllItems.aspx
Description:

General Settings

▫ List name, description and navigation
▫ Versioning settings
▫ Advanced settings
▫ Validation settings
▫ Column default value settings
▫ Audience targeting settings
▫ Rating settings
▫ Form settings

Permissions and Management

▫ Delete this document library
▫ Save document library as template
▫ Permissions for this document library
▫ Manage files which have no checked in version
▫ Information Rights Management
▫ Workflow Settings
▫ Generate file plan report
▫ Enterprise Metadata and Keywords Settings
▫ Information management policy settings

Communications

▫ RSS settings

Columns

A column stores information about each document in the document library. The following columns are currently available in this document library:

Column (click to edit)	Type	Required
Title	Single line of text	
Created	Date and Time	
Modified	Date and Time	
Created By	Person or Group	
Modified By	Person or Group	
Checked Out To	Person or Group	

▫ Create column
▫ Add from existing site columns
▫ Column ordering
▫ Indexed columns

(1) In the settings screen select the **Create column** to add a metadata column

SB1 – 3 - Create metadata column – non required field 5 of 6

The create column screen will appear and the team site owner fills out various data elements

(1) Column name

(2) Special characteristics

(3) Description

(4) If required or not (not in this case)

(5) Other elements

(6) To save the changes staff would select the **OK** button

SB1 – 3 - Create metadata column – non required field 6 of 6

SB1 – 3 - Create metadata column – Return to sub site home

Office 365

EOC   ✎ EDIT LINKS

Lib-1 no required fields › Settings

Home
Notebook
Documents
Recent
   Lib-2 required fields
   Lib-1 no required fields
Site Contents
Recycle Bin

✎ EDIT LINKS

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Communications

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Checked Out To	Person or Group	

▫ Create column
▫ Add from existing site columns
▫ Column ordering
▫ Indexed columns

Views

A view of a document library allows you to see a particular selection of items or to see the items sorted in a particular order. Views currently configured for this document library:

View (click to edit)	Default View	Mobile View	Default Mobile View
All Documents	✓	✓	✓

▫ Create view

(1) To return to the sub site home staff would select the **EOC** tab at the top of the screen

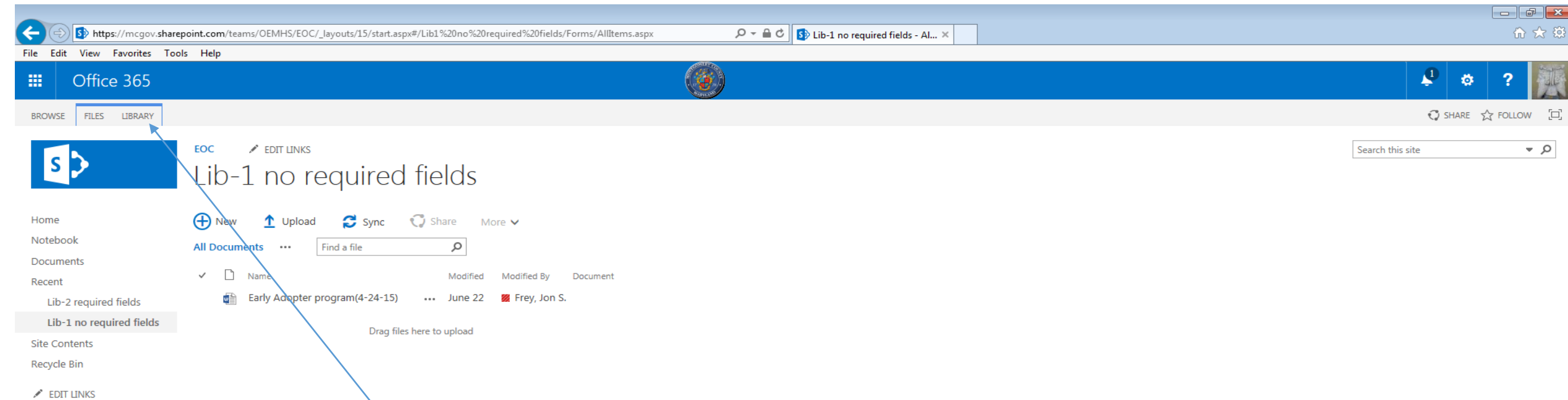# SB1 – 3 - Create metadata column – sub site home screen
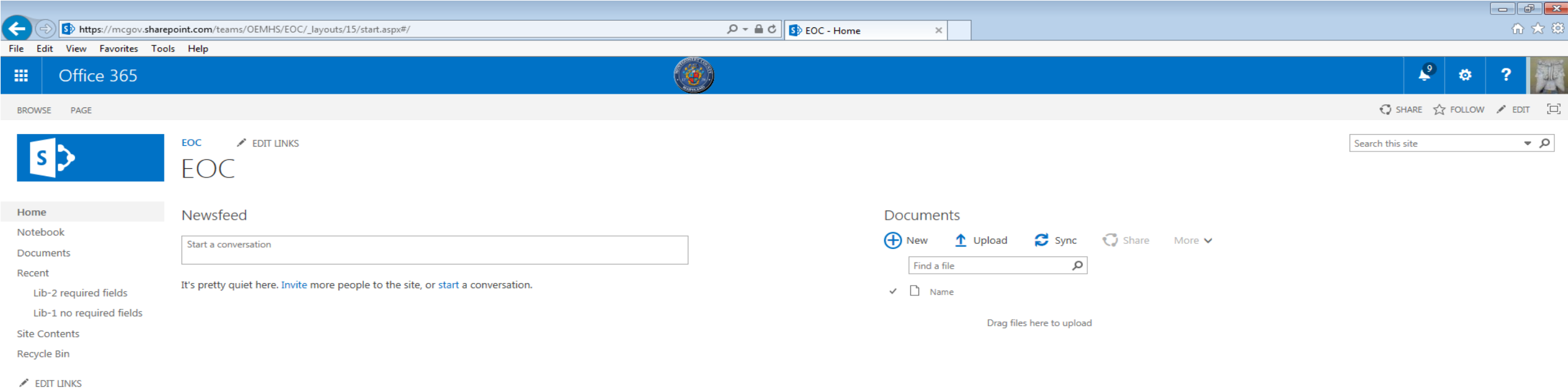
At sub site Home screen

SB1 – 4
Using Quick Edit

Quick edit is a rapid method of adding metadata columns to libraries. Rather then adding a column at a time a format where staff can add columns quickly is provided

SB1 - 4 - Add columns to a Library – Quick edit

(1) Starting within the desired library, staff selects the **Library** tab at the top of the screen

SB1 - 4 - Add columns to a Library – Quick edit

When the **Library** tab ribbon menu opens

(1) Select **Quick Edit**

SB1 - 4 - Add columns to a Library – Quick edit

The edit window will open allowing the addition of columns.

(1) To add a column you select the '**+**' symbol

SB1 - 4 - Add columns to a Library – Quick edit

Once the '+' symbol is selected

a list of data types will appear

SB1 - 4 - Add columns to a Library – Quick edit

Staff has selected the type of Text which will create a column and then allow it to be renamed

SB1 - 4 - Add columns to a Library – Quick edit

(1) Staff renames the column
"New Col"

SB1 - 4 - Add columns to a Library – Quick edit

(1) Once staff has completed adding columns they would select **STOP** editing the list to save changes

SB1 - 4 - Add columns to a Library – Quick edit

After editing we can see that the new column has been added

SB1-5
Converting Documents

Office 365 requires that files are in the newest format. Files created by Office 2003 applications use the older formats and will need to be converted prior to being migrated onto SharePoint online

The following are the user instructions for performing those activities

Universal Data Accessibility

With the County moving to Office 365 there is a need to have critical business data universally accessible to the staff that need it.

From an Office 365 perspective this means in the Cloud either in OneDrive or in SharePoint online team sites

SB1 - 5 – Converting Files – Introduction

Staff Private Storage

Shared drive Source Location

Convert files with old formats

C

OneDrive

U

XLS	XLSX
DOC	DOCX
PPT	PPTX

Convert to Compatible Formats Tool

Select the data which is most useful.

Generally less than a year since last access

SharePoint Team Site

S

One of the key activities in the data migration is determining what data should move and into what form and in what location will it go.

Department Team Site Main

V

?

Sub-Site - A

Sub-Site - B

Lib -1

Lib -2

Lib -1

Lib -2

SB1 - 5 – Converting Files – Instructions steps 1 and 2

1. Open the folder containing the files you wish to convert
2. Right click in the blank space of the folder and choose "Sort by" > "Type" to sort the files by item type.
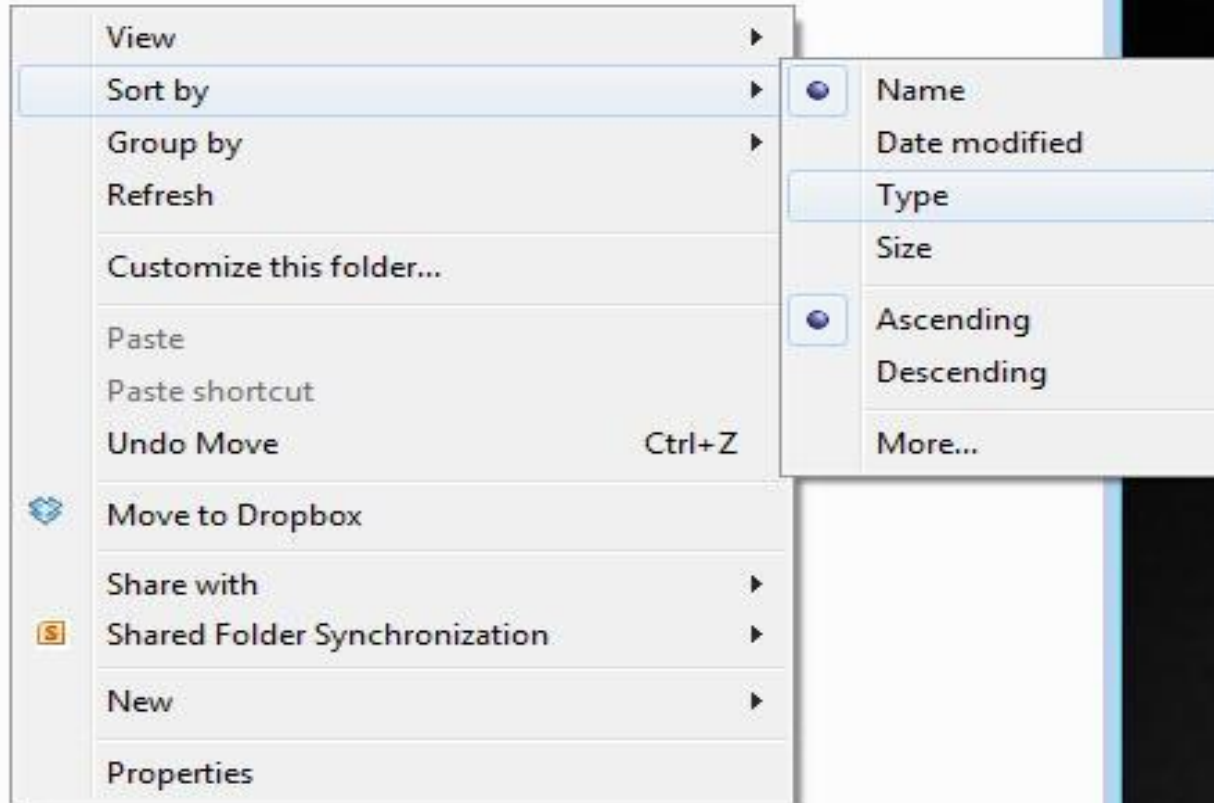
SB1 - 5 – Converting Files – Instructions steps 3 and 4

3. Single click on the first file you wish to convert of a single file type you wish to convert (Word files for example)

Doc1	6/8/2015 2:34 PM	Microsoft Word 9...	22 KB
Doc2		crosoft Word 9...	22 KB
Examples of stuff		crosoft Word 9...	22 KB
Winning lottery numbers		crosoft Word 9...	22 KB

Type: Microsoft Word 97 - 2003 Document
Size: 21.5 KB
Date modified: 6/8/2015 2:34 PM
Pages: 1
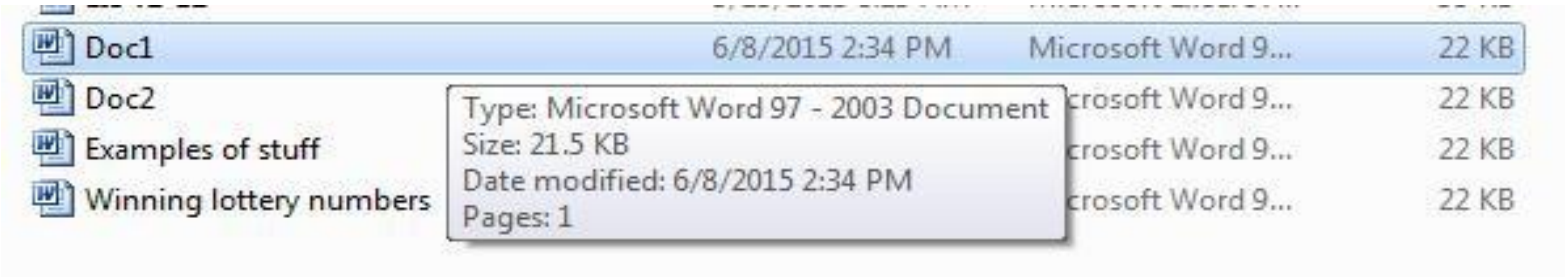
4. Hold the shift key and single click the last file to select all of the files of that type

L3 v2-12	3/13/2013 8:19 AM	Microsoft Excel 97...	93 KB
Doc1	6/8/2015 2:34 PM	Microsoft Word 9...	22 KB
Doc2	6/8/2015 2:34 PM	Microsoft Word 9...	22 KB
Examples of stuff	6/8/2015 2:34 PM	Microsoft Word 9...	22 KB
Winning lottery numbers	6/8/2015 2:35 PM	Microsoft Word 9...	22 KB
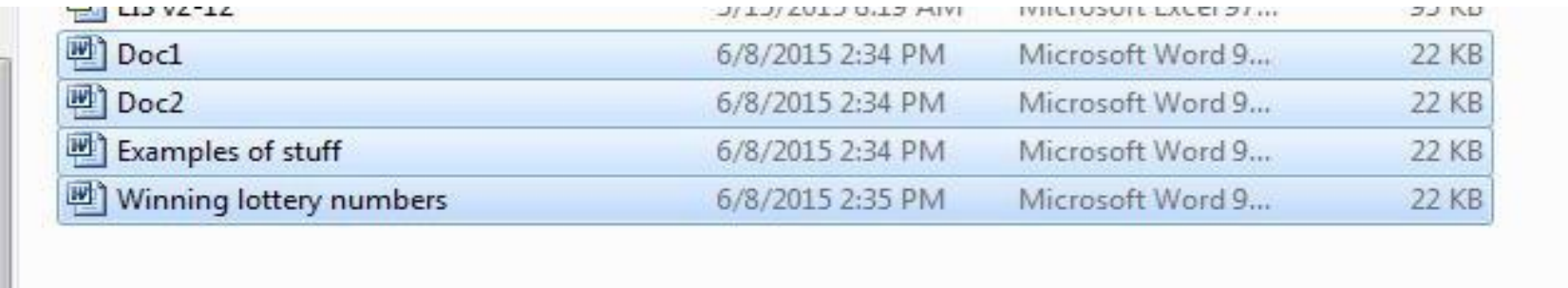
SB1 - 5 – Converting Files – Instructions step 5

5. Right click on the selected files and choose "Save As"
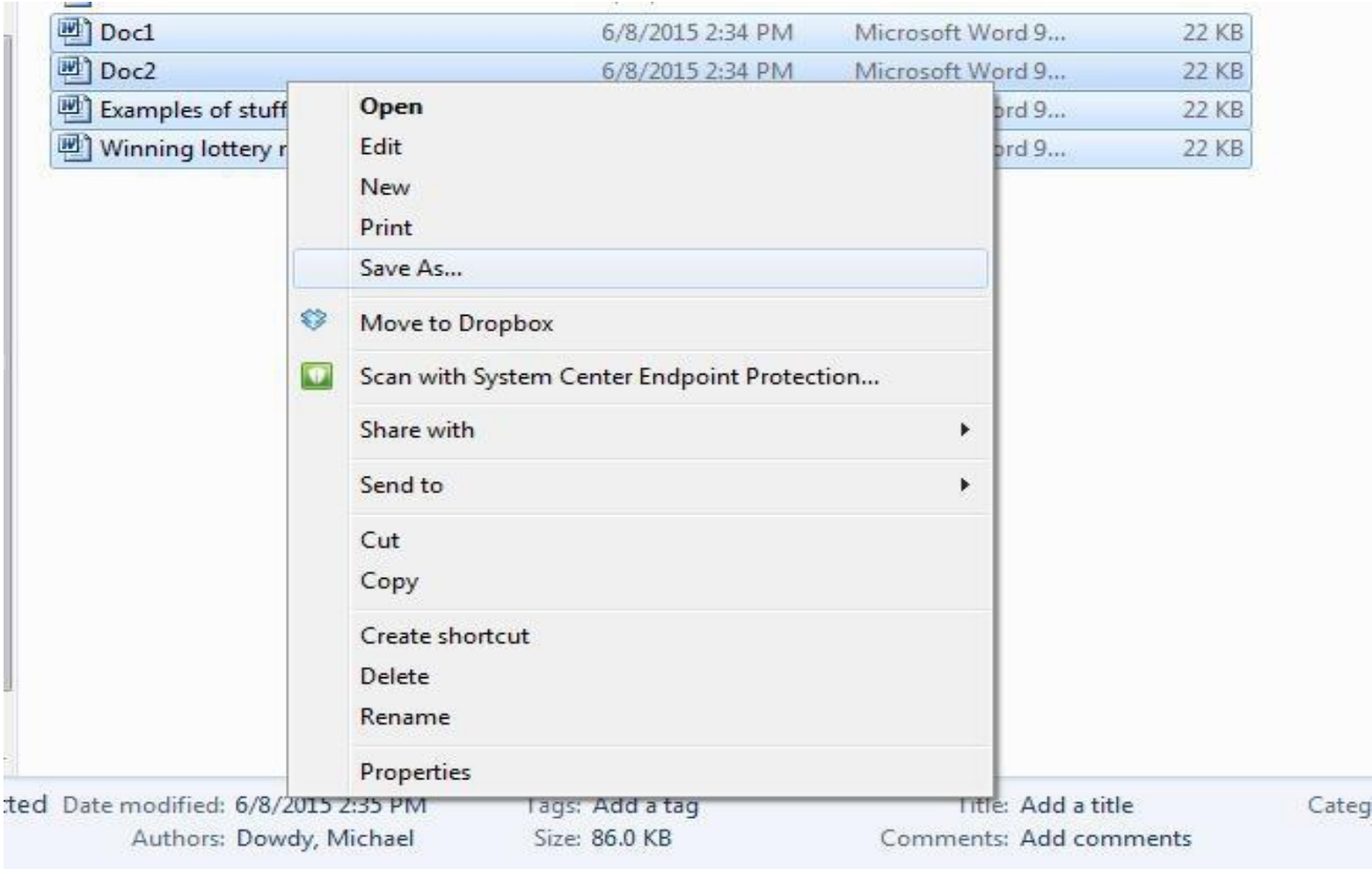
6. You will be prompted for each file to save it as a new file. Under the "Save as type:" dropdown (located above the Save button), choose the file type ending in **x**. For example Word document files should be saved as **Word 2007 Document (*.docx)**. Excel files should be saved as **Microsoft Office Excel 2007 Workbook (*.xlsx)**.
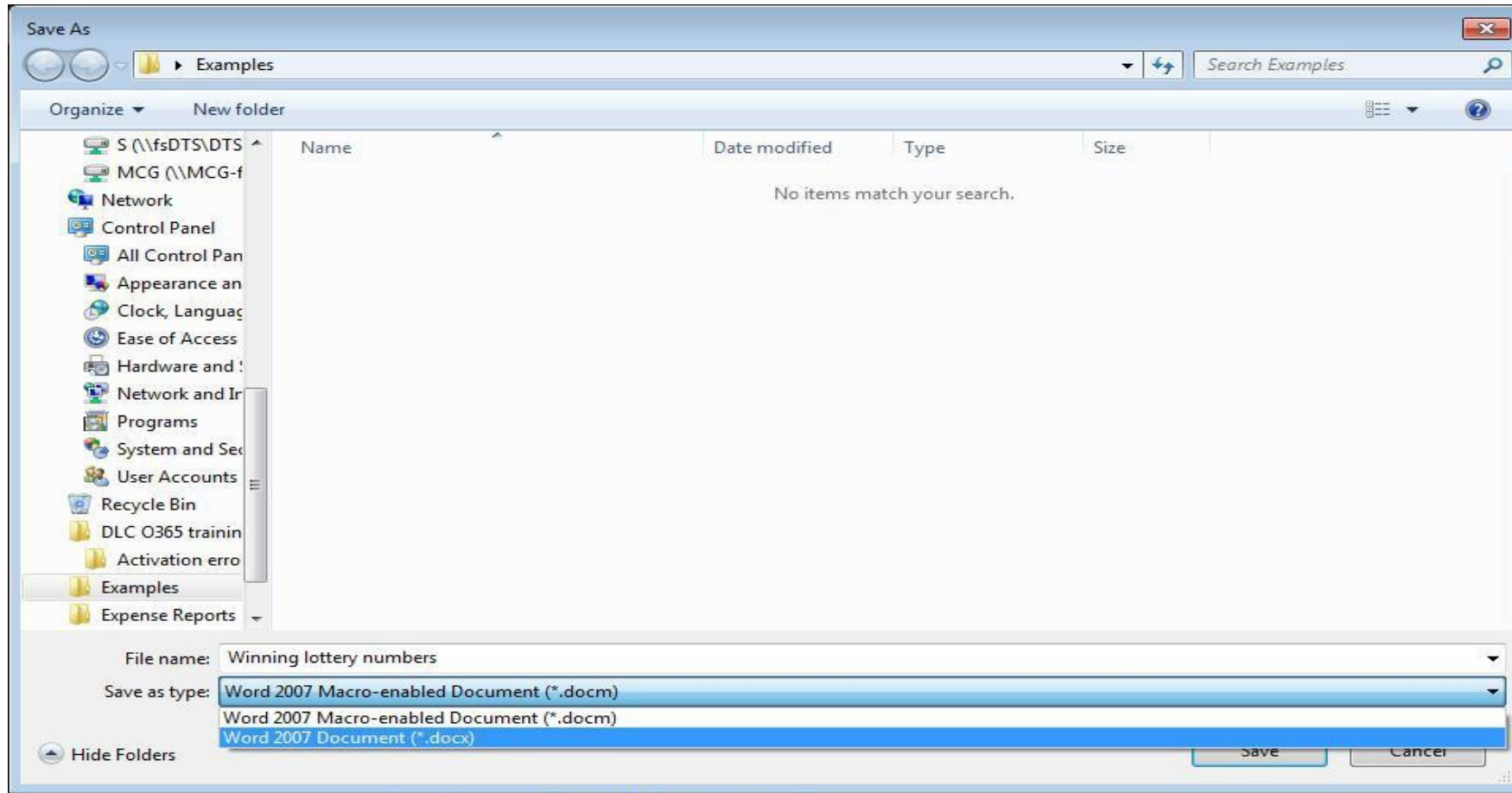
Note: For Macro Enabled Files, simply save it as the default type.(.docm or .xlsm)

SB1 - 5 – Converting Files – Instructions steps 7 and 8

7. Repeat steps 3 through 6 as needed for each file type that needs to be converted, such as Excel, Word or PowerPoint files.

8. Once saved, the converted version of the files can be uploaded to the OneDrive cloud and opened.

SB1 - 5 – Converting Files – Post migration follow-up

Once data has been converted and migrated from servers please be sure that the old files are either deleted or marked as read-only to avoid possible confusion and updating of the wrong file

SB1-6
Bulk Loading Documents

This is the preferred approach to managing the migration of documents from the server based drives to SharePoint.

Be sure that the files have the newer Microsoft file extensions and if not run the files through the converter before moving them

SB1 - 6 - Loading Multiple Files / Folders – Selecting a library

(1) Once staff selected a library it would open and files and folders would be displayed.

SB1 - 6 - Loading Multiple files / folders – Select - **Open with Explorer**
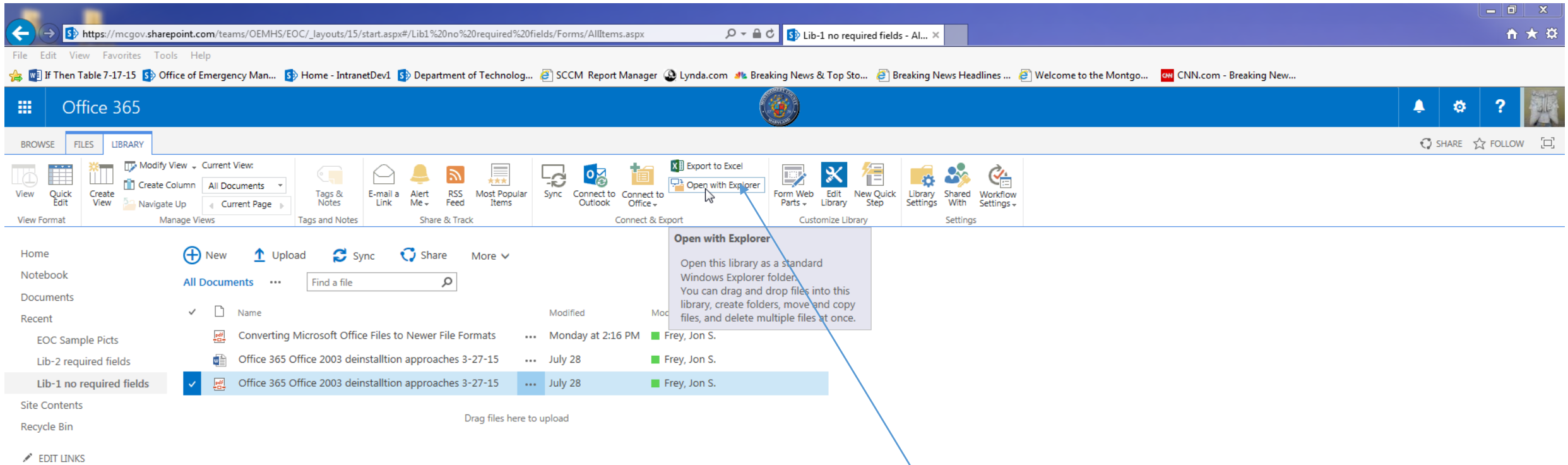
(1) Once staff would then select **Open with Explorer** to bring up the explorer view of the library

SB1 - 6 - Loading Multiple files / folders – Open with Explorer view

Once selected the system will display an explore view of the library which is much more compatible with moving files and folders

Source Document folder

Open with Explorer folder

SharePoint Online folder

SB1 - 6 - Loading Multiple files / folders – Files complete journey to SharePoint

The files and folders appear in the SharePoint Online library

Source Document folder

Open with Explorer folder

SharePoint Online folder

SB1-7
Loading Documents with and without required fields

(1) Select the library where files are to be added

(1) Locate file to load into the library
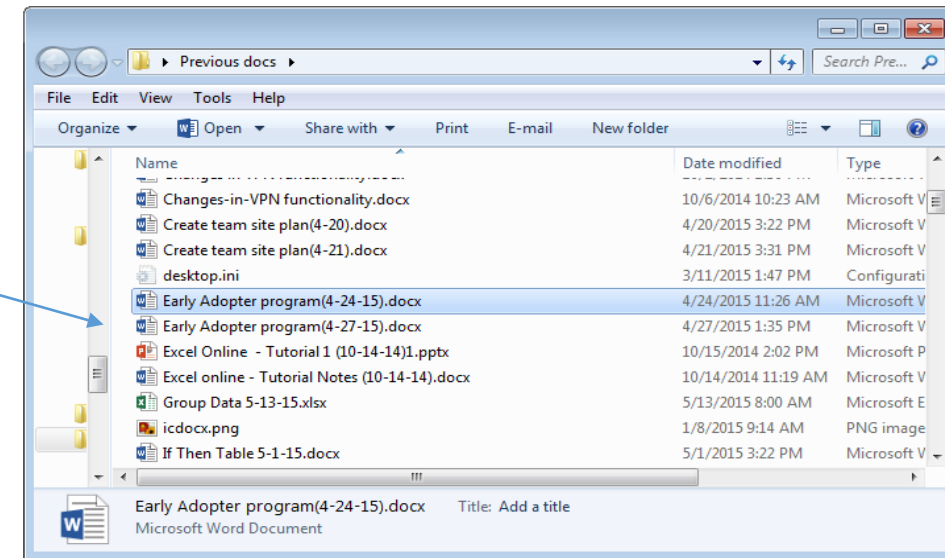
(1) Drag and drop it to the loading area in the library screen

File loaded into library
and checked in

THE END