Created by CLS Lab Managers Spring 2021

Center for Language Science
Guide for Box Migration to Office 365 (OneDrive & SharePoint)

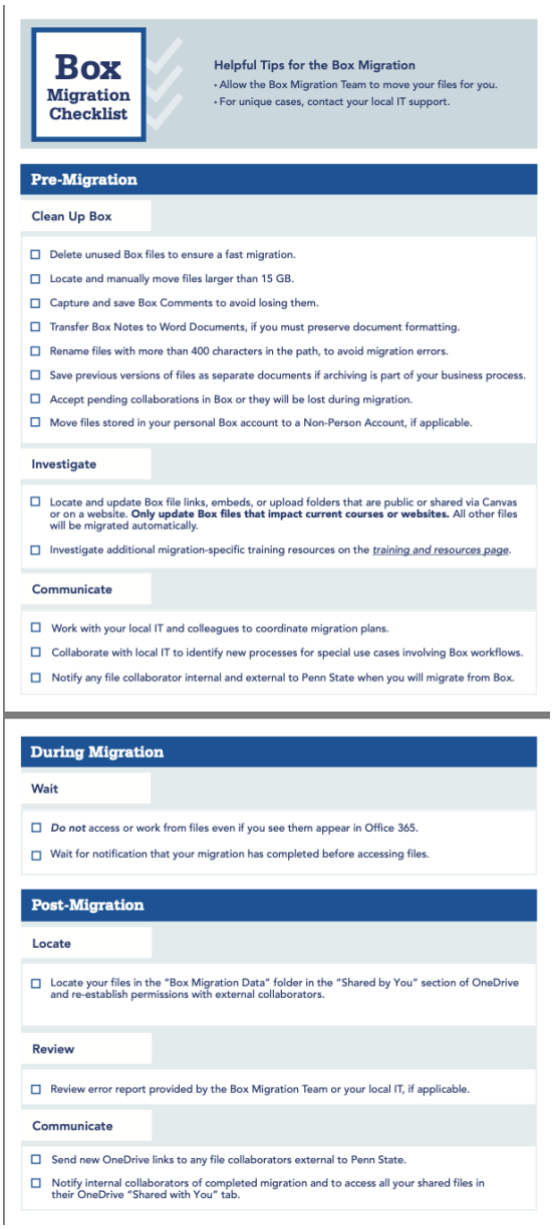
Follow the Migration Checklist and check off what you complete!

IMPORTANT WEBSITES:

https://storage.psu.edu/
https://office365.psu.edu/

PRE-MIGRATION:

1. Delete all personal files you no longer want from your "My Box Notes" folder.
2. Files larger than 15gb will not migrate; download them to your computer or upload to Kaltura. (https://psu.mediaspace.kaltura.com)
    a. OneDrive provides 5TB of total storage.
3. Convert Box comments to separate word documents (they will not migrate).
4. If you used Box Notes, those files will be converted to Word documents and will be migrated, but their format may be lost.
5. Only the most recent file version will be migrated- if you wish to retain previous versions, download, duplicate, and reupload the previous version(s).
6. Shorten file path lengths greater than 400 characters. If longer, the file will not migrate.
7. Remove invalid file name characters; they will be removed from the file name in the migration: "*:<>?/\|
8. Communicate with internal and external collaborators:
    a. Internal collaborators will retain access to folders, and will be able to access migrated files in SharePoint ("Shared with me") or OneDrive ("Shared").
    b. External collaborators will lose access- inform them of this.
9. Only use the browser version of Box; terminate usage of Box Sync and Box Drive.



Box Migration Checklist

Helpful Tips for the Box Migration
- Allow the Box Migration Team to move your files for you.
- For unique cases, contact your local IT support.

Pre-Migration

Clean Up Box
- ☐ Delete unused Box files to ensure a fast migration.
- ☐ Locate and manually move files larger than 15 GB.
- ☐ Capture and save Box Comments to avoid losing them.
- ☐ Transfer Box Notes to Word Documents, if you must preserve document formatting.
- ☐ Rename files with more than 400 characters in the path, to avoid migration errors.
- ☐ Save previous versions of files as separate documents if archiving is part of your business process.
- ☐ Accept pending collaborations in Box or they will be lost during migration.
- ☐ Move files stored in your personal Box account to a Non-Person Account, if applicable.

Investigate
- ☐ Locate and update Box file links, embeds, or upload folders that are public or shared via Canvas or on a website. **Only update Box files that impact current courses or websites.** All other files will be migrated automatically.
- ☐ Investigate additional migration-specific training resources on the *training and resources page*.

Communicate
- ☐ Work with your local IT and colleagues to coordinate migration plans.
- ☐ Collaborate with local IT to identify new processes for special use cases involving Box workflows.
- ☐ Notify any file collaborator internal and external to Penn State when you will migrate from Box.

During Migration

Wait
- ☐ *Do not* access or work from files even if you see them appear in Office 365.
- ☐ Wait for notification that your migration has completed before accessing files.

Post-Migration

Locate
- ☐ Locate your files in the "Box Migration Data" folder in the "Shared by You" section of OneDrive and re-establish permissions with external collaborators.

Review
- ☐ Review error report provided by the Box Migration Team or your local IT, if applicable.

Communicate
- ☐ Send new OneDrive links to any file collaborators external to Penn State.
- ☐ Notify internal collaborators of completed migration and to access all your shared files in their OneDrive "Shared with You" tab.

DURING MIGRATION: (2 PHASES)

(IT will inform you of the migration starting date, and update you with information on which phase you are in)

Phase 1:

1. Continue to work with Box files/folders & add new collaborators
2. DO NOT access files that have been migrated to OneDrive, move/rename/delete Box files/folders, or remove/change current collaborators.

Phase 2:

1. Wait for IT email- at this point, you must wait. Do not access files in Box, or migrated files in OneDrive.

POST-MIGRATION:

1. Your local IT or the Box Migration Team will send migration report to confirm all files migrated properly.

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2. If issues arise (files do not migrate), error report will display this.
3. You will be able to locate and manually migrate these files after automatic migration is complete
4. Review all files in OneDrive (previously personal Box files) & SharePoint (previously NPA content) & verify everything migrated correctly.
5. All content migrated to OneDrive can be found at this file directory: My Files -> Box Migration Data
6. Re-add external collaborators to folders & inform them of the migration.
7. Communicate to all file collaborators that the migration is complete and send them the shared linked to the appropriate OneDrive folder.
8. Share & move folders in OneDrive and SharePoint as you'd like.

Migration Process in Group VS. Individual Accounts

Important notes:

1. Know the difference between a non-person account (NPA) and a personal box account.
    a. NPAs are folders that many people work on together with equal permissions, and have "b-" at the beginning of the file name.
    b. Personal box account are private storage spaces you can add collaborators to.
    c. The migration of an NPA is different than that of a personal box account. See (https://storage.psu.edu/individual/) and (https://storage.psu.edu/group/) for additional information.

NPAs:

- Work with your work unit to clean folders; use the migration checklist.
- A Box NPA folder will migrate to SharePoint and will be accessible in the "Shared with me" files. See the image below for additional information.

Migrated Files

- Migrated files and folders will be added to the Document Library of a new SharePoint site under the NPA name (*e.g.*, b-ittraining-Shared).
- Files and folders located in the NPA file structure will be added to the Document Library in a folder named **Box Migration Data**.
- Files and folders owned by the NPA but located outside of the NPA file structure will be migrated to the NPA SharePoint site document library (regardless of its original location in Box).

Personal Box Accounts:

- Work with collaborators to clean folders; delete large files.
- You can only clean files as an owner, not as a viewer. If you are an owner, and don't believe files need to be cleaned, don't take any action. Just make note of the files before and afterwards to make sure the files migrated properly.
- A Box personal account folder will migrate to OneDrive in "My Files". This is the case for the owner, and all collaborators. Please see below for the file permissions you will retain post-migration.

Box	Microsoft OneDrive
Co-Owner	Full
Editor	Read, Write
Previewer Uploader	Read, Write
Previewer	Read
Viewer	Read
Viewer Uploader	Read, Write

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