

# File Server for Office 365 Migration

## **SphereGen Case Study**

Our client needed to retire an on-prem file server that was in use for over 10 years. With an increasing percentage of their workforce shifting to working remotely over the last several years, file access and collaboration became far more challenging

Microsoft Partner

# OVERVIEW

To prepare for the server retirement and to promote better organization, security, and collaboration, SphereGen worked to migrate departmental shared folders to designated Microsoft Teams and Teams channels and to move personal folders to users' OneDrive folders.

## Challenges

The on-prem file server presented multiple operational issues around documentation and file usage:

- File collaboration typically occurred through email attachments, causing mismatched versions or lost information and increased Exchange server storage.
- With few exceptions, folders were accessible by the entire organization, even if they contained sensitive information.
- Versioning was managed by creating many document copies.
- The shared folders had no managed hierarchical structure or taxonomies.
- User-specific files were mixed in with files and folders intended for collaboration.
- Sharing files outside the organization was impossible outside of email.
- The volume to migrate included over 500GB in 830,000 files located in over 48,000 folders.

## Solution

SphereGen took the following approach to migrate all the file contents from the file server to the O365 environment:

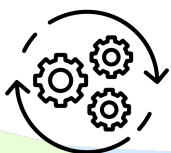
1. Analyze and capture details from the existing File Server and O365 environment.
2. Work closely with the client to validate the correct actions and mapping of legacy file server assets.
3. Perform the migration in batches and provide support as needed.

Our client provided the time and attention necessary to review file server contents and provide mapping decisions. The client also provided the IT support required to ensure SphereGen had access to perform the analysis and migration.

# RESULTS

- Cost Savings – the server was able to be retired, eliminating maintenance costs.
- Process Optimization – modern cloud-based collaboration enabled via O365 environment.
- Improved Security – use of SharePoint, Teams, and OneDrive security.

*Process Optimization*



*Cost Savings*



*Improved Security*



# THE DETAILS

To ensure a successful migration from a file server to the Office 365 environment the project was broken into 4 steps.

## APPROACH

### Analysis Phase

SphereGen captured detailed listings of the file server contents and the existing O365 Teams, SharePoint sites, and OneDrive folders. The resulting documentation served as the foundation for use in client mapping exercises and migration execution, tracking, and validation.

### Review

SphereGen worked closely with the client project owner and departmental teams to review the file server contents and get direction on what actions were needed, whether deleting files or establishing destination mapping. The migrations were batched by department and users. Before the migration, it was necessary to create new Teams and Teams channel destinations in multiple cases and set up security.

### Communications

SphereGen carefully captured the mapping and used it to perform and track the migrations. It also provided advanced communications for the project owner to send to end users affected by scheduled migrations. SphereGen also provided helpful learning resources as part of the end-user communications to aid the transition.

### Migration

The migrations started with a single-department pilot and a single-user migration. Once validated, the next step was for all user folders to migrate to OneDrive user folders. Finally, at the client's request, review sessions, communications, and migrations were batched and scheduled over several weeks to minimize the transition for users.

## CONCLUSION

Migrating from a file server to the O365 environment realize the following benefits:

- **Reduced Costs** – The file server is enabled for retirement, eliminating related operating and maintenance costs.
- **Process Optimization** – Users now have a better organized, more intuitive environment for collaboration and secure sharing of information with partners.
- **Improved Security** – Teams owners now have direct control over access for team members, and OneDrive security.
- **Scalability** – As the organization evolves and grows, the O365 will scale as needed, allowing for the easy addition of new Teams, team members, and organized content.