BOX TO SHAREPOINT REPORT (13th March, 2025)

Summary:

The meeting primarily centered around strategizing and outlining the process for migrating data from Box to SharePoint. Discussions included identifying the scope of the migration, evaluating data structures, ensuring data integrity, and addressing potential challenges such as security, compliance, and user accessibility.

Meeting recap

RECAP

- **Folder Structure Overview:** Vincent provided an overview of the folder structure in Box, explaining the different zones and folders for Canadian member organizations, application contents, themes and functions, user folders, and region and country content.

- **Permissions Management:** Vincent explained the permissions management in Box, highlighting the different levels of access for system administrators, global service desk members, and content managers. He also mentioned the need to work on retention and preventing users from using user folders as organizational folders.

- **Region and Country Content:** Vincent described the region and country content structure in Box, explaining the geographical subdivisions and the different folder structures for member organizations and programs. He also mentioned the need to update the folder structure to reflect the current view of the world for Oxfam

- **Access to Directories:** Matthew asked about the access to directories in Box for different regions, and Vincent explained that users only see the content they have been added to as collaborators, with different permission levels depending on their role and department.

- **Sharing Content:** Vincent explained the different ways of sharing content in Box, including adding people as collaborators with different permission levels and creating shared links accessible to people within the organization or externals.

- **SharePoint Site:** Matthew asked if there was already a SharePoint site created for the content, and Vincent explained that they currently use Microsoft Teams for collaboration and do not have a SharePoint site for storing file contents.

- **Migration Process**: Joseph provided an overview of the migration process from Box to SharePoint, explaining the pre-migration activities, pilot migration, full migration, and post-migration activities, including validation, adoption, and change management.

- **Duplicated Files**: Nadia asked about handling duplicated files during the migration, and Joseph explained the challenges of identifying duplicates and the need to carefully consider the best approach to avoid deleting important files.

- **Access for Assessment**: Kevin asked about the access needed for the assessment, and Joseph explained that they need access to both Box and SharePoint environments to review the current structure and prepare for the migration.

- **Timeline Considerations**: Vincent mentioned the timeline considerations for the migration, including the contract renewal with Box in October and the need for at least six months of prep work to modify integrations with intranet and Salesforce.

- **Sequencing Options**: Vincent discussed the different sequencing options for the migration, such as moving user folders first or member organizations one at a time, and emphasized the need for guidance on the best approach.

- **Next Steps**: Joseph summarized the next steps, including starting the assessment as soon as they have the credentials, and communicating the expected timeline to finish the assessment and provide a report.

Main ideas discussed:

Folder Structure

- Creating a folder structure for each member organization

- Using a default zone for general content

- Subdividing content by geographical regions

- Providing recommendations for organizing folder structures

- Managing permissions manually for cross-entity content

Permissions Management

- Applying retention policies to user folders

- Preventing users from using personal folders as organizational folders

- Managing permissions at a granular level

- Using user groups for permission management

- Creating shared links for content access

Migration Strategy

- Identifying content to delete before migration

- Moving user folders first during migration

- Using third-party tools for migration

- Running pilot migration before full migration

- Implementing changes in SharePoint settings before migration

Integration

- Modifying integration between intranet and Box

- Changing integration between Box and Salesforce

- Considering other integrations with Box

- Using APIs for Box integration

- Reviewing contractual agreements for sharing admin credentials

Action Items:

- **Box API Limits:** Find out the API limits and thresholds for Box tenant to ensure smooth assessment and migration.

- **Assessment Credentials:** Create an account named "Joseph" with high privileges on Box and SharePoint environments for assessment purposes.

- **NDA Execution:** Send NDA for execution to facilitate sharing of Box admin credentials for assessment.

- **SharePoint Changes:** Share the document detailing upcoming changes in SharePoint settings to ensure they are considered during the assessment.

- **Integration Modifications:** Prepare for modifications in the integration between intranet and Box, and between Box and Salesforce, to transition to OneDrive and SharePoint.

- **Data Cleanup:** Identify and delete old, unused, or redundant content from Box before migration.

- **Cold Storage Identification:** Determine which content needs to be moved to cold storage, such as Azure BLOB storage, before migration.

- **Migration Sequencing:** Consider different options for sequencing the migration, such as moving user folders first or migrating member organizations one at a time.

- **Duplicate Files:** Investigate tools to identify and handle duplicate files in Box during the assessment.

- **Assessment Report:** Prepare an assessment report and analysis based on the findings from the Box environment to guide the migration process.