

Project Cortex: Readiness and preparation

Office Hours Call
22 April 2020



Agenda - Readiness

- Inventory and move what you can
- Connect what you can't move
- Modernize current experiences
- Prepare users for change
- Q&A



Joining us today



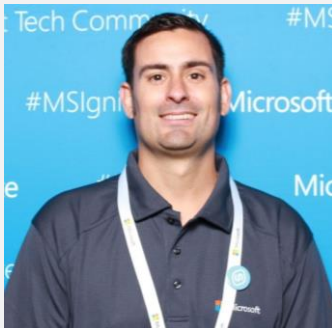
Brad McCabe

Senior Product Manager
Intelligent Intranet and Employee
Communication



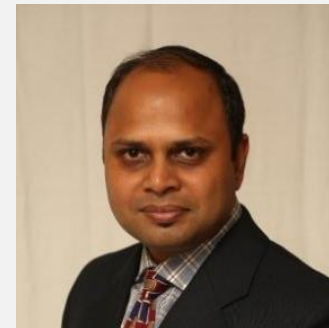
Kerem Yuceturk

Principal Program Manager
OneDrive SharePoint
Project Cortex, Search



Mike Hollinshead

Principal Program Manager
OneDrive SharePoint
Customer Engineering



Shivakumar Seetharaman

Principal Program Manager
Microsoft Search Graph Connectors



Luis Enrique Torres

Principal Program Manager
OneDrive SharePoint
Customer Engineering

Inventory and move what you can

Mike and Luis

Assess and remediate your content

Before beginning your migration, it's important to perform an analysis of your current environment. Only you know your data and how it's used and who uses it.

An initial assessment can begin with working with your users in two main areas:

- Discovery - Identify what you have to move
- Assessment - Determine if content is obsolete or redundant and can be deleted

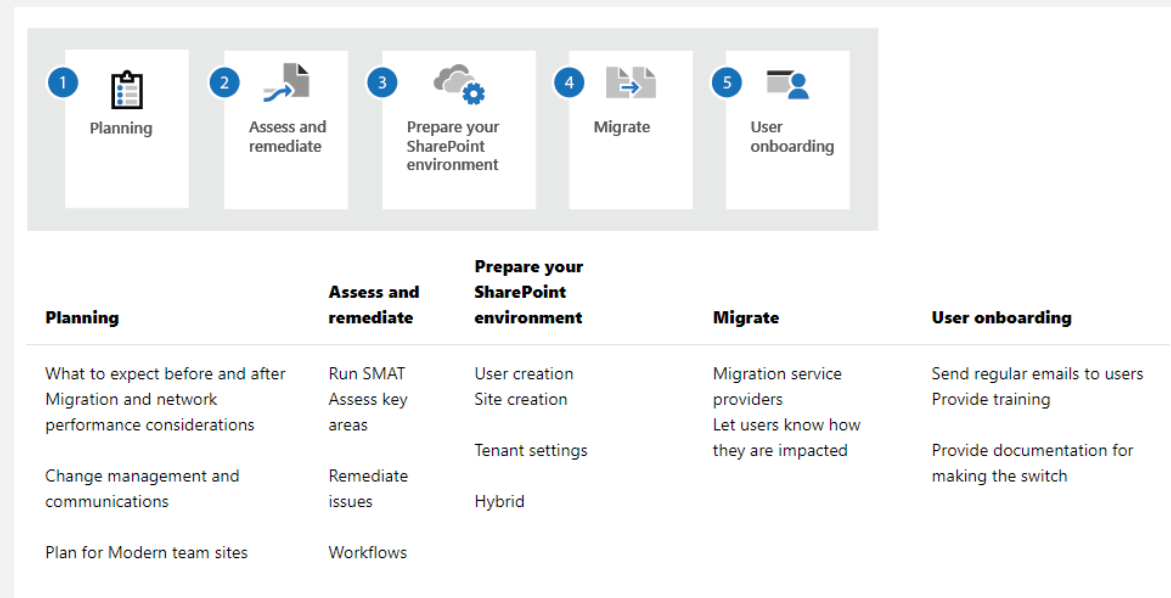
Okay, but how?

Start with set of migration scenario guides

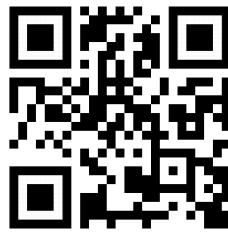
- Migrate to SharePoint Online
 - > SharePoint Migration Tool (SPMT)
 - > Migration Manager
 - Migrate to SharePoint Online using PowerShell
 - Migrate to SharePoint Online using the Azure Data Box
- > Mover Migration Guides
- > Migration performance
- ∨ SPMT Migration Scenario Guides
 - Box to OneDrive Migration Guide
 - MySites to OneDrive Migration Guide**
 - File share to OneDrive and SharePoint Migration Guide
 - SharePoint Server team sites Migration Guide

<https://docs.microsoft.com/sharepointmigration/mysites-to-onedrive-migration-guide>

Consistent flow – with an explicit *Assess and remediate* section



For SharePoint related scenarios – leverage the Migration Assessment Tool (SMAT)



<https://aka.ms/SMAT>

Simple tool that scans the contents of your SharePoint server to identify impact of server migration to SharePoint and OneDrive in Microsoft 365

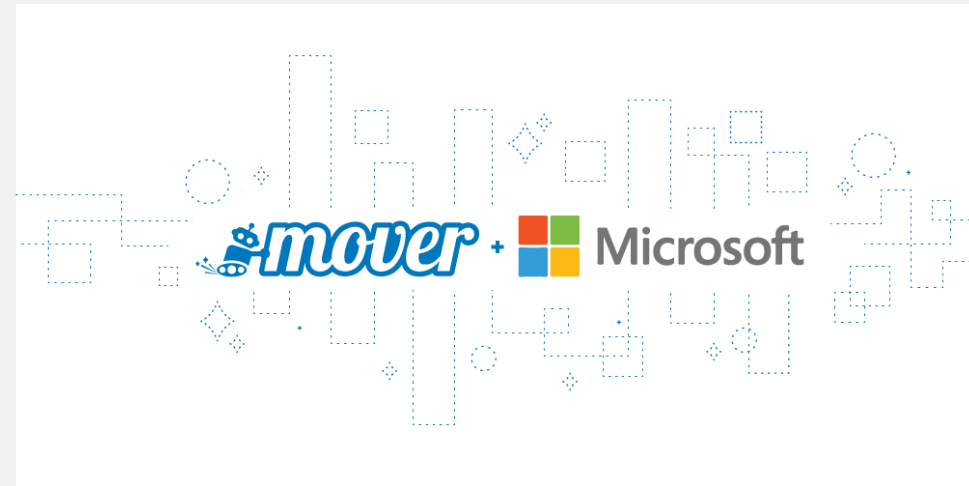
- Support for SharePoint 2010 and 2013
- Comprehensive set of scans
- Site usage analysis
- Identity mapping
- Available for all Microsoft 365 customers

```
Administrator: Windows PowerShell
SharePoint Migration Assessment Tool [SMAT] version 1.0.1709.18002

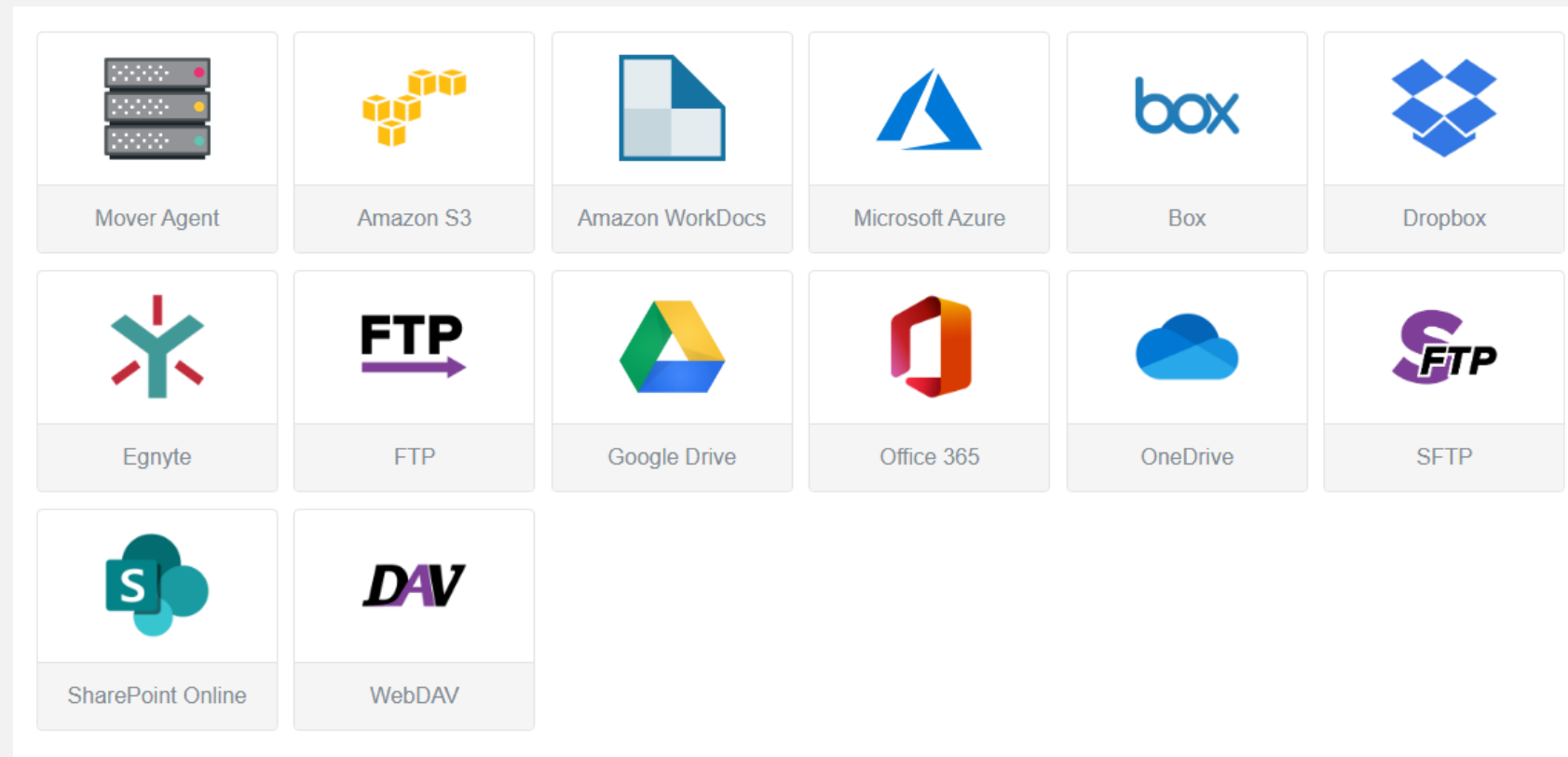
Scan                               Status    % Complete # Issues Status Message
=====
Alerts                             Finished 100         0 Finished scan work
Apps                               Finished 100         0 Finished scan work
BCSApplications                    Finished 100         0 Finished scan work
BrowserFileHandling                Finished 100         0 Finished scan work
CheckedOutFiles                    Finished 100         4 Finished scan work
CustomizedPages                    Finished 100         0 Finished scan work
CustomProfilePropertyMappings      Finished 100         0 Finished scan work
EmailEnabledLists                  Finished 100         0 Finished scan work
FileVersions                        Finished 100         0 Finished scan work
FullTrustSolution_Farm             Finished 100         0 Finished scan work
FullTrustSolution_Content          Finished 100         0 Finished scan work
InfoPath                           Finished 100         0 Finished scan work
IRMEEnabledLibrary                 Finished 100         0 Skip scanner work be
LargeExcelFiles                    Finished 100         0 Finished scan work
LargeLists                         Finished 100         0 Finished scan work
LargeListViews                     Finished 100         0 Finished scan work
LargeSites                         Finished 100         0 Finished scan work
LockedSites                        Finished 100         0 Finished scan work
LongODBUrL                         Finished 100         0 Finished scan work
ManagedMetadataLists              Finished 100         4 Finished scan work
NonDefaultMasterPages              Finished 100         0 Finished scan work
PublishingPages                    Finished 100        13 Finished scan work
PublishingSites                    Finished 100         3 Finished scan work
SandboxSolution                   Finished 100         0 Finished scan work
SecureStoreApplications            Finished 100         2 Finished scan work
SiteTemplateLanguage               Finished 100        11 Finished scan work
UnsupportedWebTemplate              Finished 100         5 Finished scan work
WebApplicationPolicy               Finished 100         3 Finished scan work
WorkflowAssociations2010           Finished 100         0 Finished scan work
WorkflowAssociations2013           Finished 100         0 Finished scan work
WorkflowRunning2010                Finished 100         0 Finished scan work
WorkflowRunning2013                Finished 100         0 Finished scan work

Generating final report...          100%                               11/11
```

What about other sources?



Common sources
handled by Mover



Migration guides currently available at Mover.io/guides

Different migration guides available

Where are you migrating from?

Note: Mover's Office 365 Connector is the migration link for OneDrive for Business (Administrator) and SharePoint Online. For migrations from (or to) OneDrive for Business (Administrator) or SharePoint Online, use the Office 365 Connector and check out the [Office 365 guide](#).

For migrations from SharePoint on-premise, use [Microsoft's SharePoint Migration Tool](#).

You can also migrate from SharePoint on-premise with Mover's Agent Connector. For information on the Agent Connector, check out the [File Servers guide](#).



File Servers



Amazon WorkDocs



Box



Dropbox



Egnyte



G Suite Drive

Migration guide table of contents

Introduction

[File Processing Summary](#)

[Communicating with Stakeholders](#)

[Planning](#)

[Timelines](#)

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[Migration FAQ](#)

[Account FAQ](#)

[Dropbox FAQ](#)

[Office 365 FAQ](#)

[Setting Up the Migration](#)

[Migration Manager Overview](#)

[Running the Migration](#)

[Transfer Logs](#)

[Reports](#)

[Post-Migration Tips](#)

Got it – but I still need some help?

Welcome to Microsoft FastTrack

FastTrack helps customers deploy Microsoft cloud solutions. Customers with eligible subscriptions to Microsoft 365, Azure, or Dynamics 365 can use FastTrack at no additional cost for the life of their subscription.



Envision new cloud capabilities

Plan cloud deployments with help from FastTrack, a service included in your Microsoft subscription.

[Sign in >](#)



Access engineering expertise

Receive end-to-end guidance from Microsoft engineers and partners throughout your deployment.

[Learn more >](#)



Drive business value

Use our change management resources to help gain user adoption and achieve your business goals.

[Sign in >](#)

www.microsoft.com/fasttrack

FastTrack Migration benefits

WHAT'S INCLUDED

FastTrack portal access for self-serve planning and training

All customers

Ongoing access to FastTrack engineers or approved partners

150+ seats

Data migration

500+ seats

NOTES

- **FastTrack Led Migrations** are migrations performed and led by FastTrack as part of the benefit for customers with 500+ seats
- **FastTrack Guided Migrations** are migrations where FastTrack will provide guidance and assistance but will ***not*** perform the migration. Customers self-migrate in this scenario.
- **More details:**
<https://go.microsoft.com/fwlink/?linkid=2045431>

FASTTRACK LED MIGRATIONS


(single G-Suite environment)


(Starter, Business, Enterprise)


File shares (SMB 2.0+)



FASTTRACK GUIDED MIGRATIONS


File shares (SMB 2.0+)


Workstation Documents





Migrate files details

WHAT'S INCLUDED

<i>Destination</i>	<i>Source environment</i>	
SharePoint Online	<ul style="list-style-type: none"> File shares (Server Message Block [SMB]) file shares on devices supporting SMB 2.0 onward) Box (Starter, Business, Enterprise) 	
OneDrive for Business	<ul style="list-style-type: none"> File shares (SMB file shares on devices supporting SMB 2.0 onward) A single G Suite environment (Google Drive only) Box (Starter, Business, Enterprise) 	
<i>Source</i>	<i>Examples of what's included</i>	<i>Examples of what's NOT included</i>
SharePoint Online *See FastTrack Service description for a complete list.	<ul style="list-style-type: none"> Documents File and folder structure Files under 15GB Document meta data (created date, modified date, created by, etc.) Select level of permissions* 	<ul style="list-style-type: none"> Previous versions Ownership history Advanced permissions* Hidden shares Files or folders exceeding current SharePoint Online restrictions and limitations Box tags, advanced metadata, etc.
OneDrive for Business *See FastTrack Service description for a complete list.	<ul style="list-style-type: none"> Documents File and folder structure Files under 15GB Document meta data (created date, modified date, created by, etc.) User and group level file and folder permissions* 	<ul style="list-style-type: none"> Previous versions Ownership history Advanced permissions* Selected file types (e.g., Google photos, maps, and other connected apps) Files or folders exceeding current OneDrive for Business restrictions and limitations Box tags, advanced metadata, etc.

NOTES

- VPN access is a requirement. Place VMs close to source file share platforms.
- Rationalize what to move. It's common that an organization lets content grow ungoverned. This can impact migration velocity and user experience.
- Review your needs/requirements for file governance and security.
- Recommend migrating individuals that collaborate together at the same time.
- Start migration early. Migration throughput is based on factors such as, size, number of users, network bandwidth, to name a few.
- Review the FastTrack Service description for a complete list of what's in scope along with roles and responsibilities.

Interested in FastTrack?

Follow the Request for Assistance process, and specify migration

<https://fasttrack.microsoft.com/dl/M365RA>

Overview blog post: [Requesting FastTrack assistance for Microsoft 365 just got easier](https://techcommunity.microsoft.com/t5/fasttrack-blog/requesting-fasttrack-assistance-for-microsoft-365-just-got-easier)

<https://techcommunity.microsoft.com/t5/fasttrack-blog/requesting-fasttrack-assistance-for-microsoft-365-just-got/ba-p/393125>

Request Assistance

You are eligible to request assistance for these products

You are eligible to request onboarding assistance from FastTrack for the following products at no additional cost to your eligible subscription. These services are provided by FastTrack specialists, comprised of Microsoft employees, Microsoft-approved vendors, and Microsoft-approved partners.

- Azure Active Directory Premium
- Exchange Online
- Intune
- Microsoft Teams
- Office 365 ProPlus
- OneDrive for Business
- SharePoint Online
- StaffHub
- Yammer
- Skype for Business

You are not eligible to request assistance for these products

Please review the [Need Help](#) section to determine how you can become eligible to receive onboarding support for these products.

- Power BI
- Project

Need help?

[Fewer than 150 licenses?](#) [Inactive licenses?](#) [Need help from a partner?](#) [Not eligible?](#)

Onboarding support via Microsoft FastTrack specialists is only available when you purchase 150+ eligible licenses of Microsoft 365 or a product from the Microsoft 365 family. However, you may request deployment and adoption guidance and obtain help with technical issues from Microsoft Support, through the [Microsoft 365 Admin Center](#), using the Need Help in-product experience.

Request Assistance

Your Scenarios

Business scenarios describe the challenges faced by your organization and which are central to the success of your deployment. If you imported a success plan, the scenarios identified in the plan will be selected below. You may modify these selections. If you didn't import a success plan, select the challenges the customer is facing.

Unlock Creativity (3)

- Intelligent assistance**
Use intelligent assistance for design, writing, content discovery, and more to help your work shine.
Products
Office 365 ProPlus
- Business analytics**
Discover insights, analyze your data, and share your findings to help everyone make informed decisions.
Products
Office 365 ProPlus, Power BI*
*Your customer is not eligible to receive onboarding support for this product. Please contact the assigned FastTrack manager to find out how your customer may receive assistance.
- People analytics**
Understand your work habits to improve your influence and impact.
Products
Exchange Online, Microsoft Teams, SharePoint Online

Also: Microsoft Premier/Unified proactive services

For customers with a Microsoft Premier or Unified support contract

- You can reach out to your Technical Account Manager (TAM) to schedule a proactive SharePoint Online tenant validation for Cortex.
- Assign remote Premier Field Engineer (PFE) to perform health and configuration validations on your tenant.
- Identify opportunities for improvement and modernization.
- Identify readiness opportunities and gaps.
- Recommendations on next steps to prepare for a Cortex rollout.



**Microsoft Unified
Support**

Designed to help you maximize your Microsoft investment.

Find what you can't move

Kerem, Shiva

Search at work - challenges



Avg \$1B+ org maintains information across **15-20+ systems**¹



Employees spend **20%** of time searching for information²



Information silos based on security and compliance needs

¹ Source: Forrester; ² Source: McKinsey Global Institute

Graph Connectors

Connectors available:

Windows File Share

ServiceNow

SQL Database

Intranet Websites

MediaWiki

Azure Data Lake Gen2

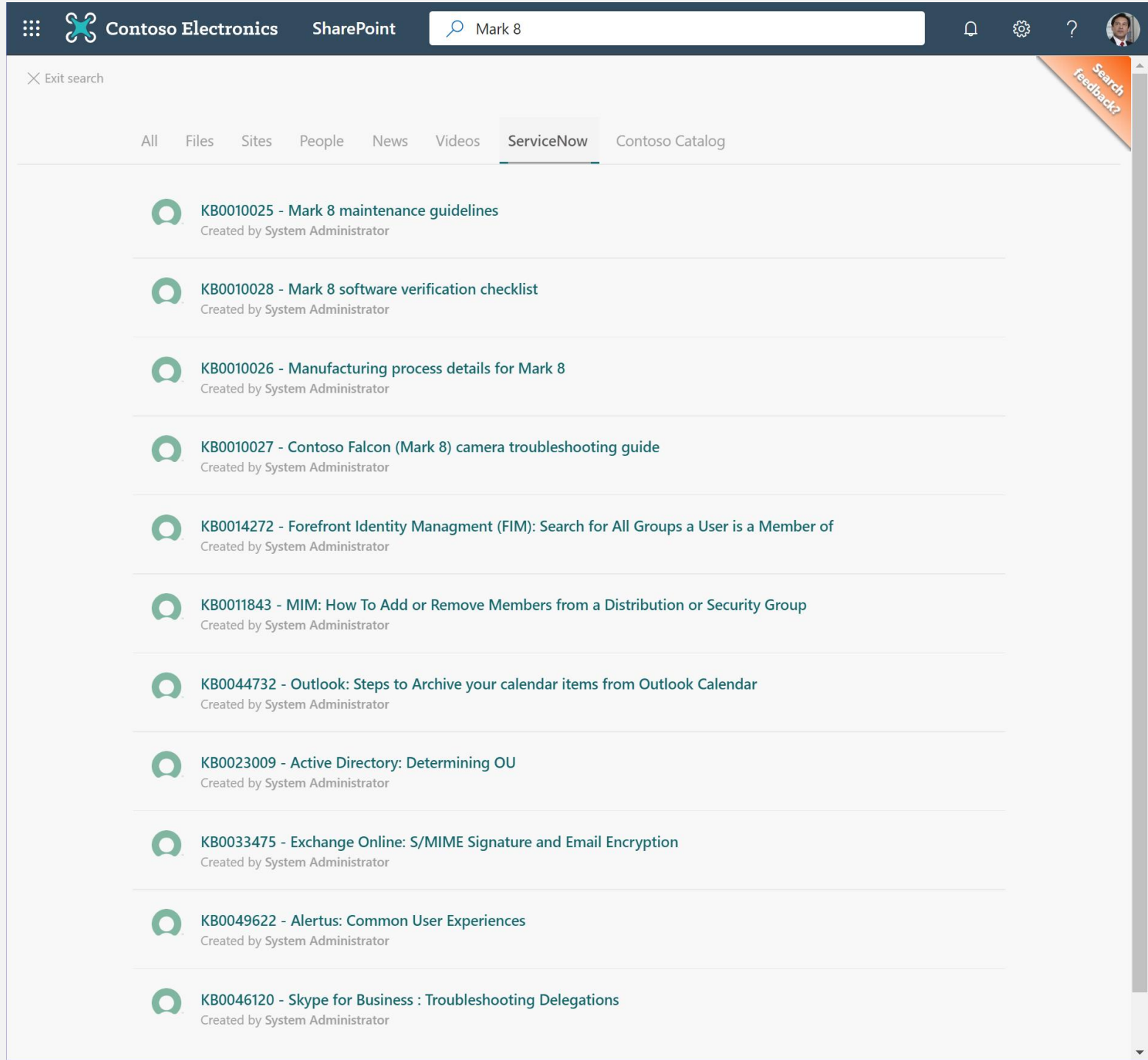
& more than 100 connectors through Microsoft Partners and the ingestion API

Custom verticals and layouts in search for connector content for SharePoint, Office.com, and Bing

Will integrate with Cortex for content understanding and knowledge scenarios – in planning

Graph Search and Indexing APIs

Security trimming based on AAD

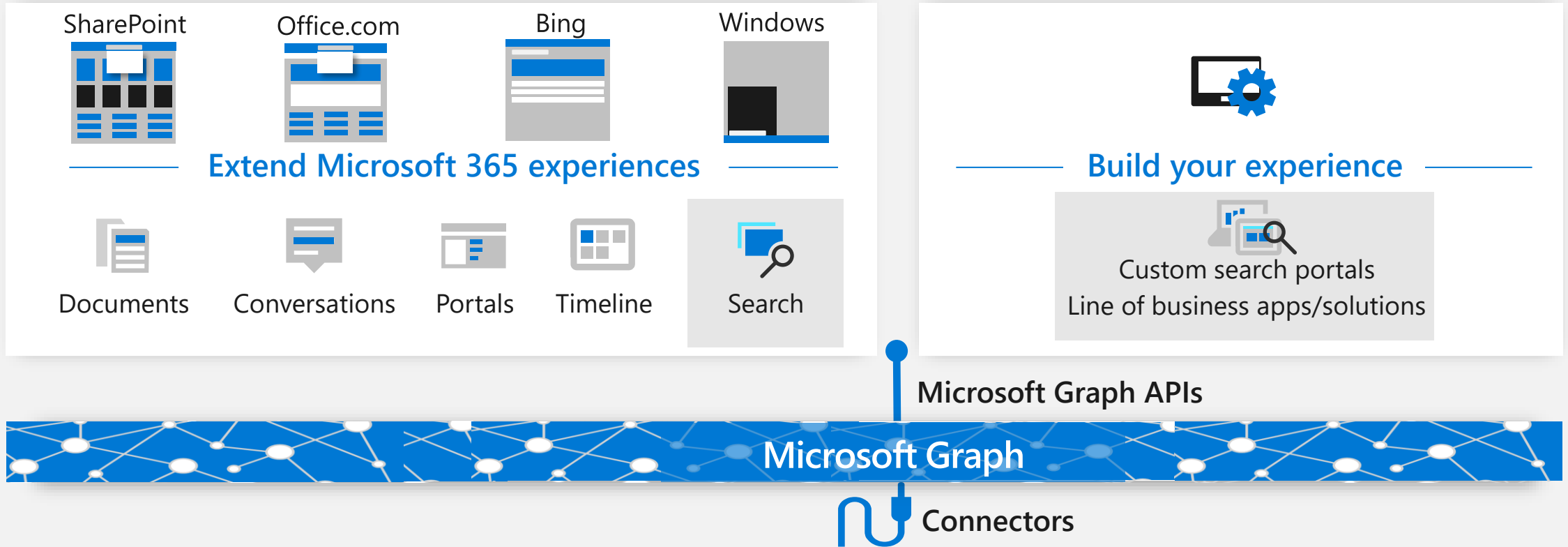


The screenshot shows a SharePoint search results page. The top navigation bar includes the Contoso Electronics logo, the text 'SharePoint', and a search box containing 'Mark 8'. Below the navigation bar, there is a search bar with 'Exit search' and a list of search results under the 'ServiceNow' filter. The results are listed as follows:

- KB0010025 - Mark 8 maintenance guidelines
Created by System Administrator
- KB0010028 - Mark 8 software verification checklist
Created by System Administrator
- KB0010026 - Manufacturing process details for Mark 8
Created by System Administrator
- KB0010027 - Contoso Falcon (Mark 8) camera troubleshooting guide
Created by System Administrator
- KB0014272 - Forefront Identity Management (FIM): Search for All Groups a User is a Member of
Created by System Administrator
- KB0011843 - MIM: How To Add or Remove Members from a Distribution or Security Group
Created by System Administrator
- KB0044732 - Outlook: Steps to Archive your calendar items from Outlook Calendar
Created by System Administrator
- KB0023009 - Active Directory: Determining OU
Created by System Administrator
- KB0033475 - Exchange Online: S/MIME Signature and Email Encryption
Created by System Administrator
- KB0049622 - Alertus: Common User Experiences
Created by System Administrator
- KB0046120 - Skype for Business : Troubleshooting Delegations
Created by System Administrator

Connectors overview

Extend Microsoft Graph with your data to power delightful Microsoft 365 experiences



Your enterprise data sources

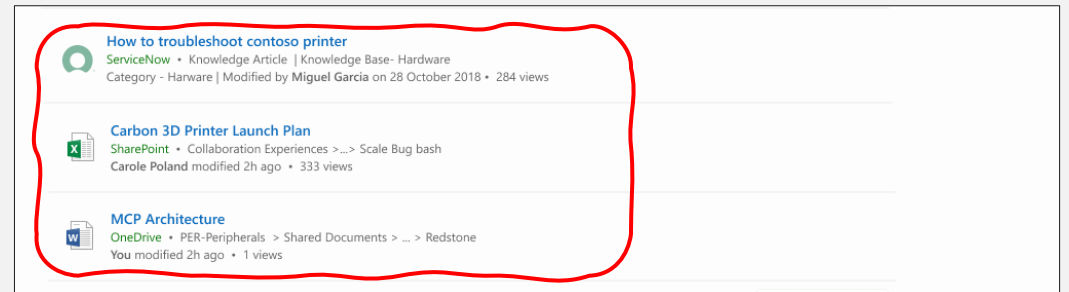
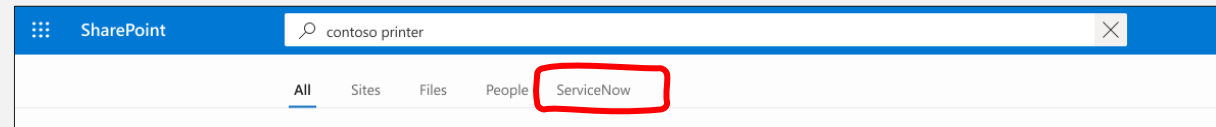
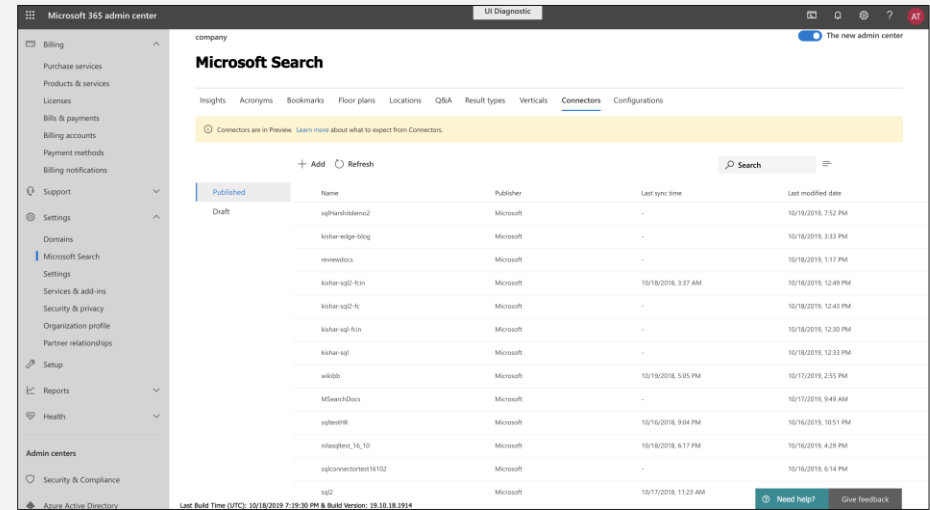
Connectors from Microsoft

- Azure Datalake
- Windows Fileshare
- Enterprise Website
- MediaWiki
- ServiceNow
- Microsoft SQL Server

Adobe Amazon Atlassian Box DELL EMC
Documentum Dropbox Google IBM NetApp
Oracle SAP Salesforce Sitecore

Steps to configure an out-of-box connector

- Configure connector
 - Connect to data-source + authentication
 - Map data source properties to Search schema
 - Manage Search permissions
 - Schedule refresh interval
- Customize Search results page
 - Configure Vertical(s)
 - Layout result-type (based on <http://adaptivecards.io>)



Resources

- Public documentation – aka.ms/iwantconnectors
- Ignite Talks
 - [Connect your world of information to Microsoft 365 and Microsoft Search: A sneak peek at Microsoft Graph Connectors](#)
 - [Getting started with Microsoft-built Graph Connectors for Microsoft Search](#)
 - [Learn how to build your own Microsoft Graph Connectors](#)
- Build your own connector
 - [Indexing API](#) (docs & API reference)
 - [Search API](#) (docs & API reference)
 - [Sample CSV connector](#)

Modernize what you have

Brad and Mike

Intelligent Intranet



Employee engagement and communications



Connect people, news, knowledge, and apps



Knowledge and content management



Shared content and solutions for any group



SharePoint

Intelligent intranet

The building blocks

Organizational news

Transform internal communications to keep people informed and engaged

Communication sites

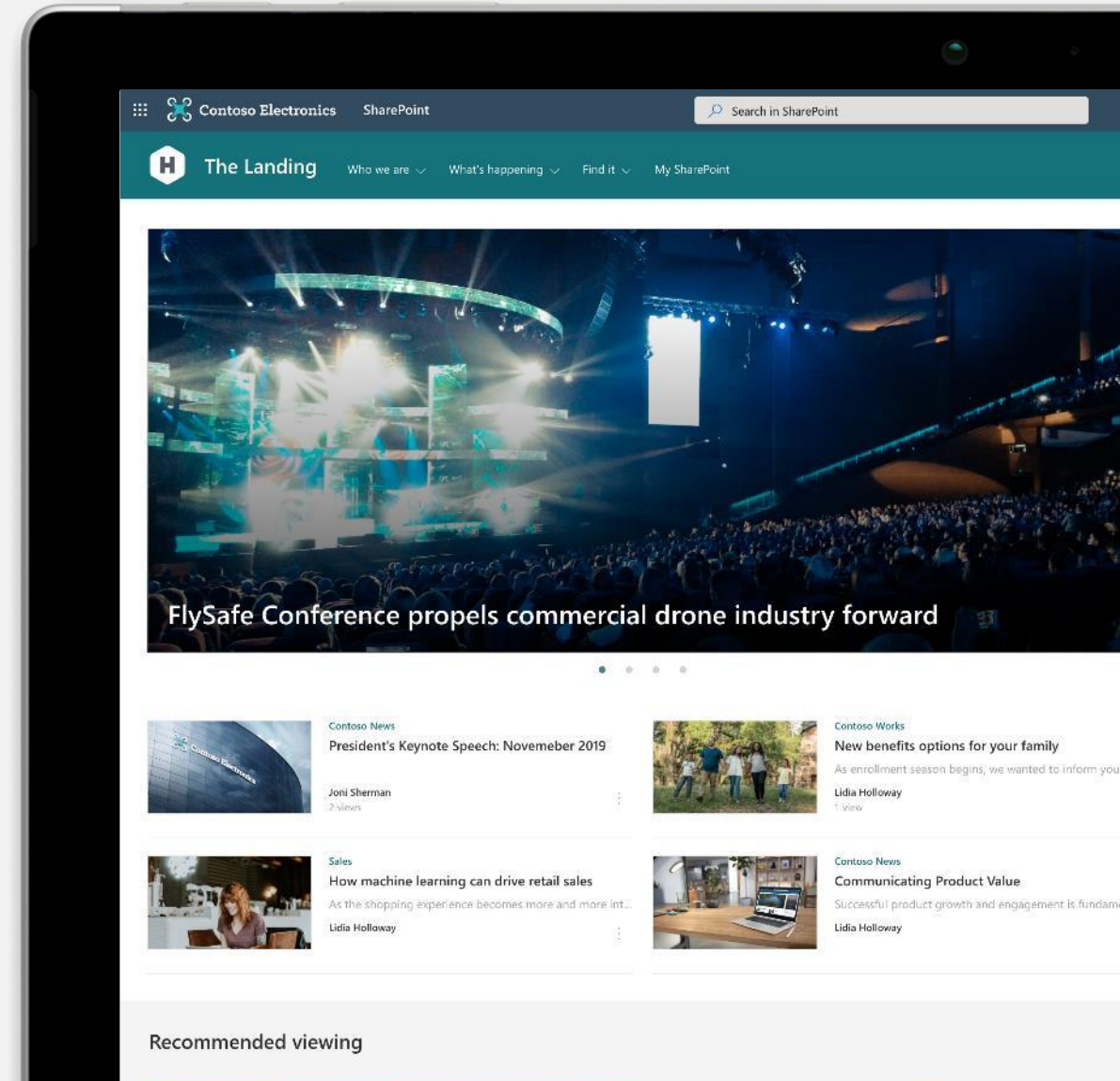
Reach a broad audience across the organization with a dynamic intranet site

Home sites

Create an engaging home for your organization, division, or function

Hub sites

Organize related sites & teams to centralize news, search and content management





SharePoint look book

Get inspired

Discover the intelligent
intranet in Microsoft 365

lookbook.microsoft.com



Bonus – Modernization scanner

Available now! <https://docs.microsoft.com/en-us/sharepoint/dev/transform/modernize-scanner>

Resources at <https://resources.techcommunity.microsoft.com/resources/build-modern-intranet-on-sharepoint-office-365/>

Filters

Type	Layout	Mapping %	HomePage	SiteUrl
AspxPage	(blank)	(blank)	FALSE	https://bertonline.sharepoint.com
ClientSidePage	Custom	0	TRUE	https://bertonline.sharepoint.com/sites/130020
WebPartPage	FullPageVertical	14		https://bertonline.sharepoint.com/sites/130021
WikiPage	HeaderFooter2Columns4Rows	17		https://bertonline.sharepoint.com/sites/130021/sub1
	HeaderFooter4ColumnsTopRow	25		https://bertonline.sharepoint.com/sites/130021/sub1/sub11

Resources:

[Modernizing your classic SharePoint sites](#)

[Transforming classic pages to modern pages](#)

Scanner summary:

Date: 10/22/2019 19:27:30

Sites: 535 Webs: 670 Lists: 431

Duration: 0 days - 0 hours - 29 minutes and 40 seconds

Version: 2.6.0.0

Page transformation insights

Types of pages

Type	Count
AspxPage	11
ClientSidePage	1113
WebPartPage	44
WikiPage	1296

This shows the type of pages found. In scope for page transformation are the pages of type **WikiPage** and **WebPartPage**

Detected page layouts

A WikiPage or WebPartPage does have a layout and this chart shows the distribution of detected **out-of-the-box layouts**.

Home page versus regular page

Distribution of **home pages versus regular pages**. Home pages could be modernized via a new of-the-box default modern home page.

Web part transformation mapping %

Each page has % of web parts that can be mapped to a modern version. 100 % means all web parts on the page can be mapped, 0 % means none can be mapped.

Web parts without a mapping (hover over the chart to get the web part types)

Show the **web parts that could not be mapped to a modern version**. You can use this information to discover the most popular not mapped web parts and either build a custom version yourselves or use an open source or ISV version.

Microsoft Teamwork Transformation Workshop



+



better together

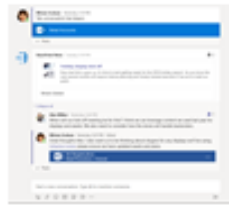
Better together, Microsoft SharePoint + Teams + Cortex

 UNLOCK THE POWER OF CORTEX WITH MODERN SHAREPOINT

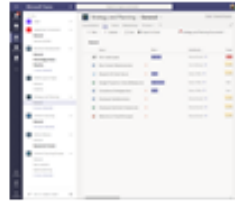
 MODERN SP POWERING TEAMS

Integrated experiences

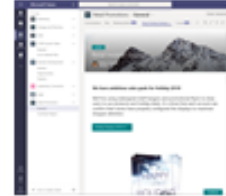
Experience SharePoint in Microsoft Teams



News



Files

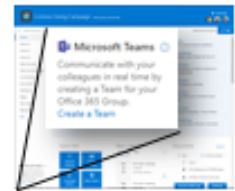


Lists, pages, and apps

Experience Microsoft Teams in SharePoint



Channel folders



Add a team



Tabs as pages

•NEW FILES EXPERIENCE
Brings the full power of SharePoint libraries to teams, including sync, custom metadata & views, custom formatting, PowerApps & Flow

SHAREPOINT PAGES IN TEAMS
Rich canvas to share news & information

SHAREPOINT NEWS CONNECTOR
Keep your team up-to-date

SHAREPOINT LISTS as TABS in TEAMS
Share data



RAPID APPLICATION DEVELOPMENT
Pages with connected web parts, Flow, & PowerApps

Microsoft Teams and SharePoint Teamwork Transformation



This program consists of two phases:

1. A 2-day transformation workshop: identifying use cases and creating your SharePoint transformation plan
2. Site transformation execution: enabling a pilot environment, site transformation execution, and readying end users via an adoption plan

Transformation workshop overview (2-days)

	Use Case Development Scenarios to help you get the most out of SharePoint modern workplace capabilities
	Transformation Plan Assess existing SharePoint in Microsoft 365 environment resulting in a remediation plan

Site transformation execution (4-week execution plan target)

	Pilot Create a pilot environment aligned to prioritized use cases
	Training and Adoption Plan Materials and resources to get users onboard and up to speed quickly

For more information, contact SpoModernPartnerLead@Microsoft.com

Ready your end users for change

Mike

READY, SET,...?

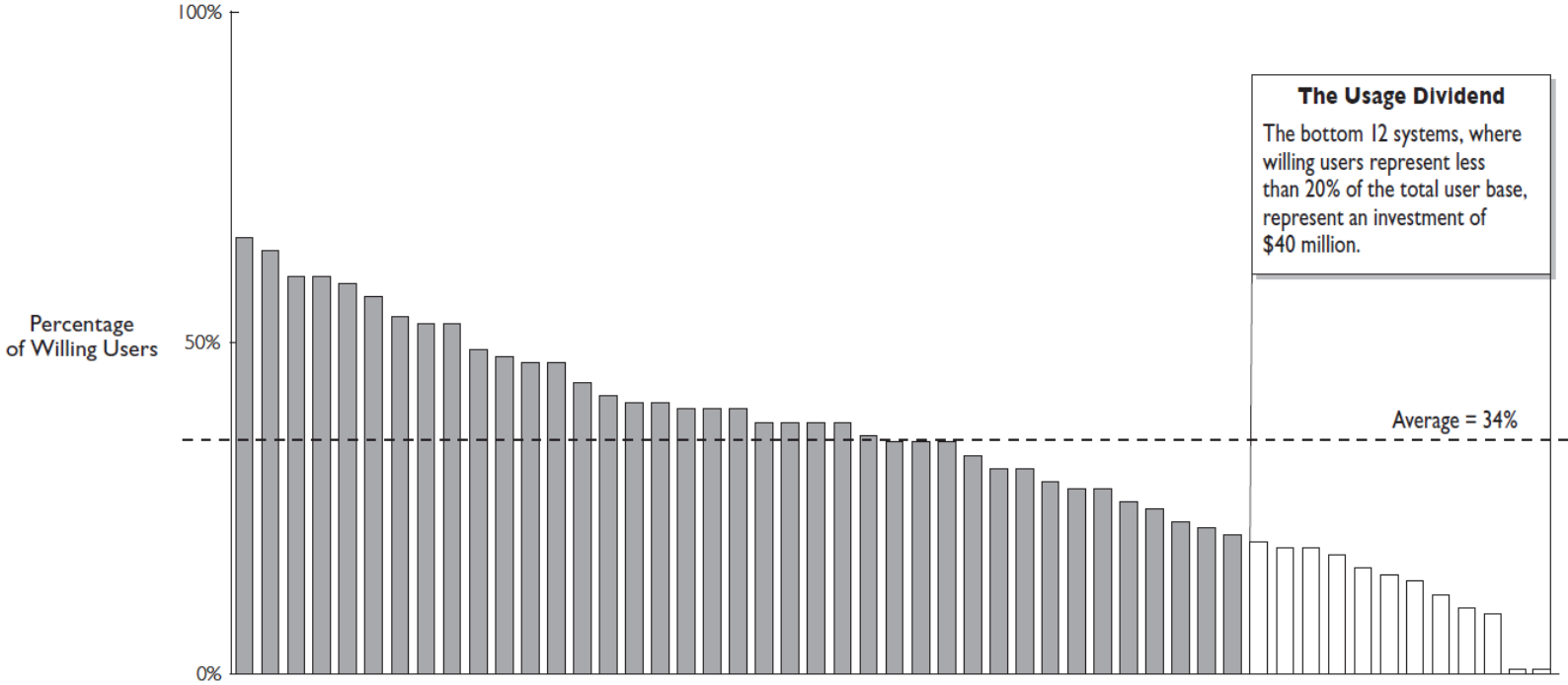
A LOW BAR

THE MARK OF USER RESISTANCE

On average, only 34% of end users are willing to use the systems that have been rolled out

Percentage of End Users Reporting Positive Usage Willingness

Bars Represent Individual System Implementations



The Usage Dividend
The bottom 12 systems, where willing users represent less than 20% of the total user base, represent an investment of \$40 million.

n = 51.

Note: Usage willingness is assessed on a 1 to 7 scale, where 1 = very low usage willingness, 4 = neutral usage willingness, and 7 = very high usage willingness. Respondents were considered to have positive usage willingness when their responses were greater than 4.5.

Source: CIO Executive Board Business Productivity Database.

Adoption success factors

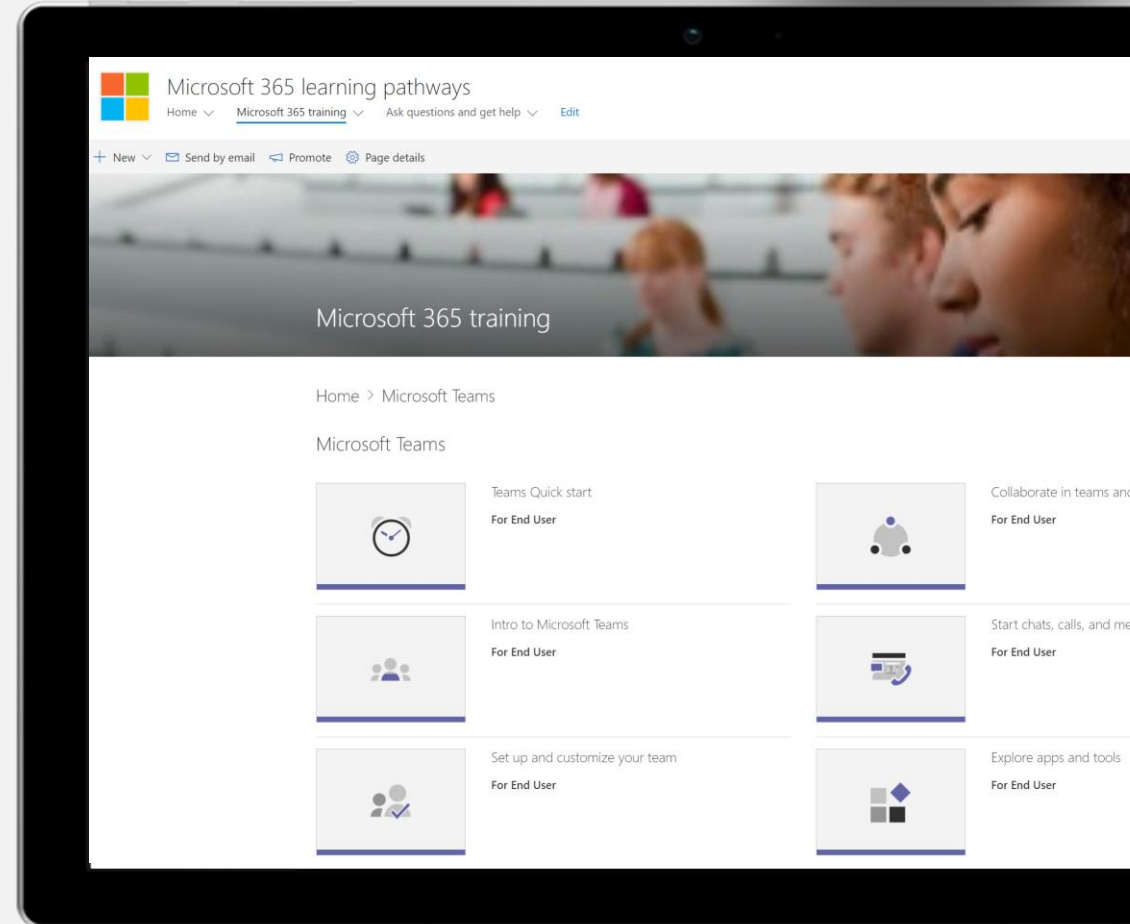


<https://aka.ms/SharePoint/Resources/Adoption>

Train users on how to use Microsoft 365 services and apps

Use **Microsoft 365 learning pathways** to train end users on how to use Microsoft 365 learning pathways and create SharePoint sites

Microsoft 365 learning pathways is an on-demand training solution designed to increase knowledge, usage and adoption of Office 365 in an organization.



<https://aka.ms/M365LP>

Communicate site owner responsibilities to help with compliance

Use the **Usage guidelines checklist** to create appropriate SharePoint usage guidelines to ensure its proper use in your organization

Help site owners understand their **responsibilities**

<https://aka.ms/SitesUsageGuidelines>

Sites usage guidelines

Using the steps below as a template, create your own site usage guidance for your site owners on how sites are set up and managed at your organization. To download this list: [insert link to PDF download](#)

Introduction

Guidance:

- Provide a short introduction to frame your guidelines. If you have broader business or digital resource use policy, link to it if it applies to SharePoint sites as well.

Sample text:

A SharePoint site is designed to be a powerful tool for team collaboration and communication. [enter your IT/productivity service org] administers the Microsoft 365 service your site is built on. The goal is to make it easy to accomplish your business goals.

General guidelines

Guidance:

- Provide general policy statements that you want your users to follow. These may include key business uses you have defined for sites, internal communication policies, or security and privacy guidelines.

Resources:

- [Plan your SharePoint site](#)
- [Guide to the Modern Experience in SharePoint](#)

Sample text:

Here are some things to keep in mind as you work with your SharePoint sites. Refer to [insert your organizations name] business resource use policy. These policies apply to all SharePoint site usage.

Guidelines for creating your site

Guidance:

- Provide basic procedural guidance. How does someone get a SharePoint site? It may be via the "create site" link on SharePoint home or you may have a unique provisioning process for your organization.
- If you have specific site templates that you want your site owners to select during self-provisioning, include that info in this section.
- Include information on custom provisioning solutions.
- Are there any ownership or site classification requirements your organization has implemented?
- When you set up your site, it's important to select the appropriate site classification level. Include references or links to your organization's data classification guidelines.

Resources:

- [Manage site creation in SharePoint Online](#)
- [Secure SharePoint Online Sites and Files](#)
- [Branding and site provisioning solutions for SharePoint](#)

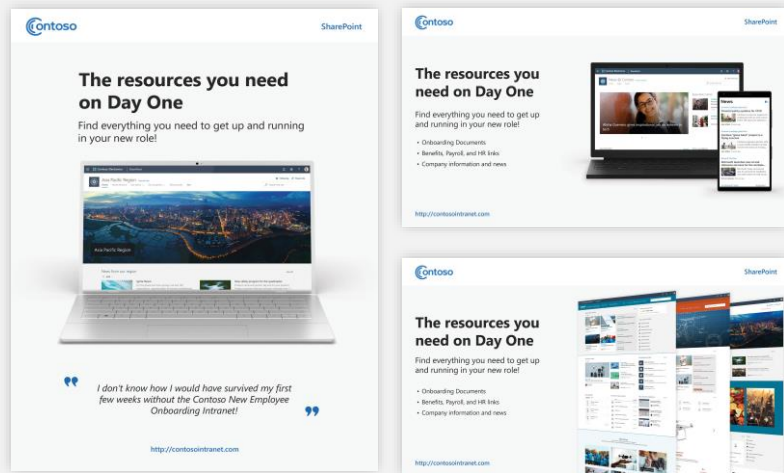
Sample text:

Sites can be created via the "create site" link at [insert your SharePoint link].

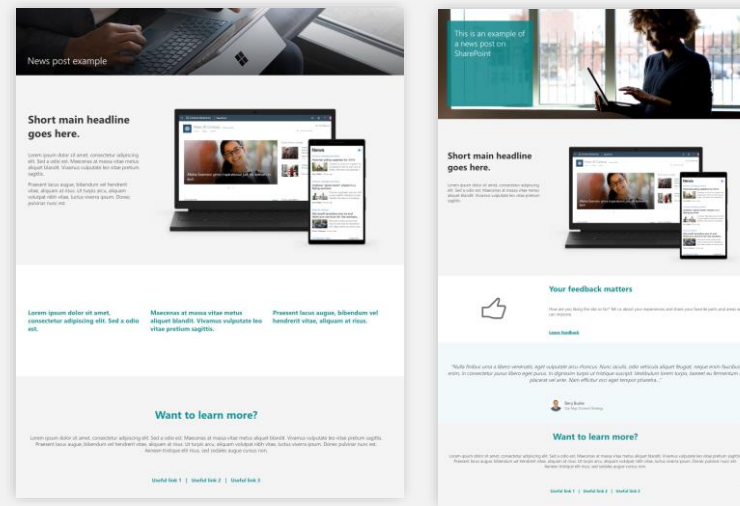
Adoption

Use available templates at <https://aka.ms/SharePoint/Resources/Adoption>

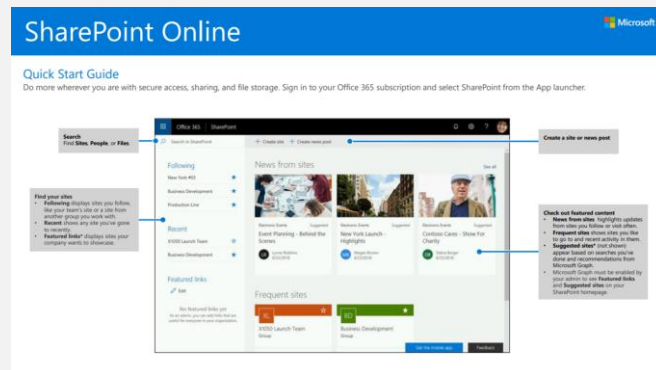
Poster templates



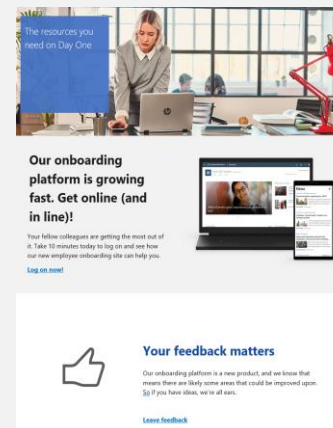
News posts samples



First Day Set Up



Tips Campaign



Q&A

Best practices to get ready for Project Cortex



GET CONTENT TO
MICROSOFT 365



MAP KNOWN SOURCES
AND ADD TO SEARCH



GET TO MODERN PAGES



UPDATE OR REVAMP
TAXONOMY/MMS

Upcoming meetings

May 06

Knowledge experiences

May 20

Document classification and MMS

June 03

Administration and configuration

Visit [the Project Cortex Office Hours page](#)
to download meeting invites





Thank you!