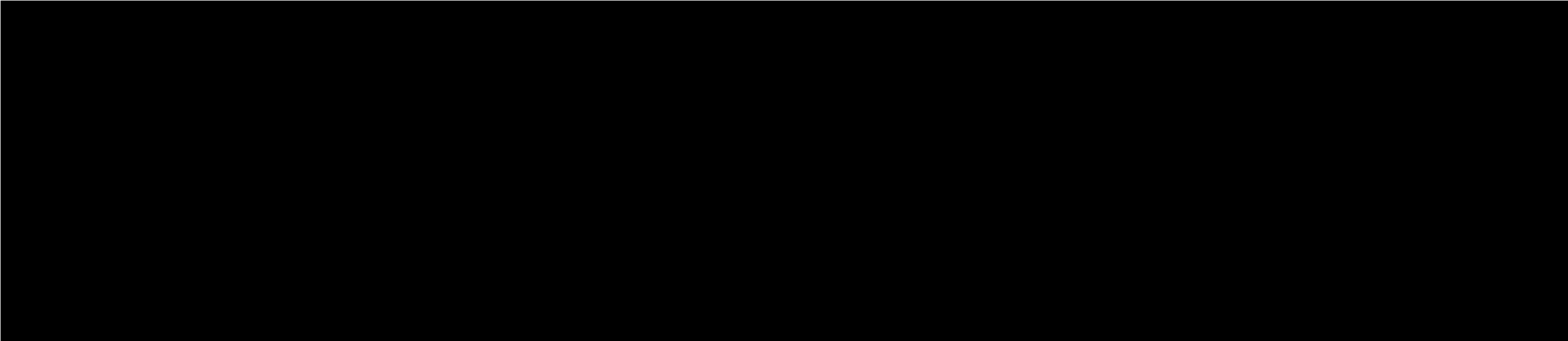




0365 SharePoint Roadmap

PREPARED FOR CDIC



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Overview

CDIC has commissioned [REDACTED] to deliver a roadmap to migrate their SharePoint 2010 on-premise farm to Office 365. CDIC has already provisioned an O365 tenant (E5 license) and is currently engaged with another vendor to implement Exchange, Skype, and OneDrive. With these pieces in place, the [REDACTED] Roadmap can focus solely on SharePoint content.

The current SharePoint 2010 farm has approximately 370 sites with more than 400,000 documents totaling 470 GB of storage. User adoption is described as half and half between Network Drives and SharePoint. With a Network Drive migration project on the horizon, CDIC would like to focus on user experience and training to help drive adoption of SharePoint Online.

Also included in the overall vision for SharePoint Online is:

- Modernize the current Intranet to make it easier to find content and provide better communication channels to staff
- Move away from folders and leverage metadata to make it easier to find and search content
- Build a foundation for records management
- Take advantage of other O365 service offerings (e.g. Security & Compliance, e-Discovery, Data Loss Prevention, etc.)

Business Objectives

- Remove technology risk and operational overhead of managing on-premise SharePoint Farm
- Modernize and align Corporate Intranet and Team Sites with Information Management best practices
- Reduce information risks by labeling content to understand where the sensitive or confidential information resides and who has access to it
- Drive user adoption and behaviours
- Deliver improved user experience when using SharePoint
- Deliver positive user experience during the transition to O365



Scope & Key Decisions

CDIC had a clear vision and scope for their O365 Migration, however there were two key decisions that required some more information. These were:

1. How much effort would be put into “cleaning up” the SharePoint structure and content
2. Would the migration include network drive content?

To help make these decisions, [REDACTED] provided detailed pro’s, con’s, and estimated efforts (see “Appendix A – Key Decisions” of this document).

For “Decision 1: Migration Approach”, CDIC choose “Option B: Analyze the current structure and content with intent of creating new logical architecture”.

For “Decision 2: Network Drive Content”, CDIC choose “Option C: Make Network Drives “read-only” and migrate some content. Users will not have the option to save new content on Network Drives however will have access to pre-existing content. Some content will be migrated to O365 (1 or 2 years) to minimize the need for users to manually upload files they want to work with.”

Both decisions have been rolled into the roadmap to help prepare recommendations and timelines.

Critical Success Factors

The following section will outline the Critical Success Factors for the CDIC O365 SharePoint Migration. These conclusions are the result of CDIC's overall vision, business objectives, answers to past success and failures, the content inventory, and [REDACTED] experience in successfully planning and delivering similar projects.

Executive & Leadership Support

The success and failure of this project will depend heavily on how well the project sponsor relates to the project, project manager, and other stakeholders. The role of project sponsor and support from other executives is often not understood or followed through causing issues with project communication and execution. It is important for the sponsor to play an active role and define, defend, and support major activities from project start to end. Some of the key activities for executive and leadership are:

- Advocates for project and help drive adoption:
- Deliver key messages (e.g. town halls, team meetings, newsletters, etc.)
- Lead by example:
 - Don't accept email attachments from staff
 - Document approvals must be within SharePoint
 - Use the system for your own content
- Commitment of resources
- Support and visibility where required

It is recommended that the project begins with a charter that is reviewed and approved by the sponsor and other executive stakeholders. It should clearly define the vision, objectives, goals, success measures, milestones, roles & responsibilities, and project governance. This will raise awareness and get early buy-in from leaders across CDIC.

The project governance should include an Executive Decision Board that has regular meetings to keep apprised of the project and make key decisions for scope, finance, quality, and resources. For most organizations, this board includes the Sponsor, IT (if not the sponsor), Legal, HR, and Communications.

For stakeholders outside of the Executive Decision Board, a regular status report should be provided outlining key decisions, risks, dependencies, along with tracking schedule and budget.

Change Management

Change Management is already a key component to any enterprise IT project. During the kickoff, it became clear that CDIC's vision will require changing user behaviours in a corporate culture that historically has challenges with adopting new technology. It was also highlighted that past failures had a lot to do with communication, training, and sustainment. It is therefore critical that Change Management is properly scoped and funded both for the project and ongoing operations to sustain and continue user adoption.

The roadmap timelines and scope include recommended practices for an enterprise release of O365 SharePoint Online. In addition, the approach has been documented in the section "Change Management". The following items highlight some of the recommendations:

- Built "by the user for the user".
 - Engage users for site structure to ensure it is built with their needs in mind. Focus on "what's in for me" when building solution.
- Establish Site Champions to represent the user community during the project and after implementation.
 - Dedicated Site Champions during the project will limit the disruption to other users
 - Site Champions can receive additional training to support their peers and be advocates to help sustain user adoption
- Provide initial and ongoing training
- Build Online Learning Centre to satisfy employee self-server training needs

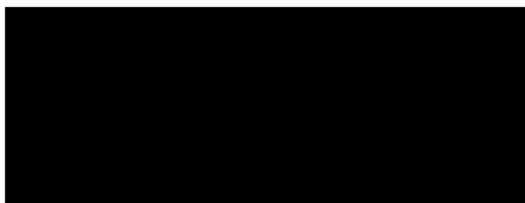
Sustainability and Measurements

For CDIC to accomplish and understand the return on this investment, it is critical to change user behaviours and drive adoption, maintain quality of the product, and continually measure the overall success. The sustainability of the project successes will be dependent on the following items:

- Create and educate users on a Governance Model to maintain overall quality of product
- Provide ongoing training with user community to introduce features and address "pain points" (e.g. lunch and learns, user community meetings each quarter)
- Build Online SharePoint Learning Centre where users can "self-serve" their training needs (e.g. user guides, videos, FAQs, quick reference cards, glossary, etc.)
- Continual improvement of search by reviewing top searches
- Continual improvement of forms and workflows to automate business processes and drive adoption
- Continual measurement of adoption and success. A report delivered every 6 months to 1 year and posted for executives and staff. This will include
 - User Survey to understand behaviours. A baseline survey should be conducted during the project and repeated every 6 months to 1 year. Future surveys will be measured against the baseline to show progress and areas which require more awareness / training.
 - Defining learning objectives for training materials and mandatory testing of staff will provide insight into user knowledge around technology. It will highlight areas of focus for ongoing training (e.g. lunch and learns).
 - Growth statistics for SharePoint and Network Drive usage. The trend should show higher growth in SharePoint storage volumes than network drives. Would be great if statistics can also show email attachments and local hard drive storage.

Content Inventory and Analysis

To ensure the O365 Roadmap is accurate and relevant to CDIC, a content inventory and analysis was required. This will help assess the current SharePoint landscape and provide a basis for project estimates.



The following table provides a summary of the findings:

Topic	Details	
Totals	SharePoint	
	Total number of Team Sites	365
	Total number of My Sites	155
	Total number of Documents	431, 559
	Total SP Storage	470 (GB)
	Total # of Workflows	48
	Total # of Custom Forms	35
	Network Drives	
	Total number of files	+1 million
Total Storage	7, 156 (GB)	
Navigation	Enterprise navigation that provides users with easy access to web apps, site collections, and sites within the tenant. Would require a similar solution in O365 to maintain user experience. Recommended to leverage O365 out of box enterprise navigation that comes with Hub sites.	

Customizations	<p>Most on-premise solutions are not compatible with O365 or easily migrated. In many cases, it is better to recreate the solution using different technology that is supported and aligned with Microsoft best practices.</p> <p>The customizations found during the content inventory can mostly be recreated using a combination of Microsoft PowerApps, Flow, and Search Query with XLST. A complete listing of all customizations and recommendations can be found in the “Information Management” section of this document.</p> <table border="1" data-bbox="541 418 1094 618"> <tr> <td>Total number of custom solutions</td> <td>14</td> </tr> <tr> <td>Not recommended for migration</td> <td>3</td> </tr> <tr> <td>Recreate using PowerApps and Flow</td> <td>3</td> </tr> <tr> <td>Recreate using Search Query and XLST</td> <td>7</td> </tr> <tr> <td>Require custom solution</td> <td>1</td> </tr> </table>	Total number of custom solutions	14	Not recommended for migration	3	Recreate using PowerApps and Flow	3	Recreate using Search Query and XLST	7	Require custom solution	1
Total number of custom solutions	14										
Not recommended for migration	3										
Recreate using PowerApps and Flow	3										
Recreate using Search Query and XLST	7										
Require custom solution	1										
InfoPath Forms	<p>The last published version of InfoPath was 2013 with end of life support in July 2026. It is considered a “dead” product that Microsoft is trying to remove support in O365. It is recommended for organizations that can replace their InfoPath forms to do so. The CDIC migration to O365 is a prime opportunity to align with Microsoft Roadmap.</p> <p>The forms found during the content inventory can be recreated using a combination of Microsoft PowerApps and Flow. A complete listing of all forms and recommendations can be found in the “Information Management” section of this document.</p> <table border="1" data-bbox="541 911 1094 1040"> <tr> <td>Total number of custom solutions</td> <td>15</td> </tr> <tr> <td>No longer needed. Convert to PDF and migrate to O365 as records.</td> <td>2</td> </tr> <tr> <td>Recreate using PowerApps and Flow</td> <td>13</td> </tr> </table>	Total number of custom solutions	15	No longer needed. Convert to PDF and migrate to O365 as records.	2	Recreate using PowerApps and Flow	13				
Total number of custom solutions	15										
No longer needed. Convert to PDF and migrate to O365 as records.	2										
Recreate using PowerApps and Flow	13										
Workflows	<p>O365 can support SharePoint and Designer workflows however it is recommended to recreate the workflows in Flow if possible. This will ensure future compatibility and align with Microsoft Roadmap.</p> <p>A complete listing of all workflows and recommendations can be found in the “Information Management” section of this document.</p> <table border="1" data-bbox="541 1300 1094 1367"> <tr> <td>Total number of custom solutions</td> <td>19</td> </tr> <tr> <td>Recreate using Flow</td> <td>19</td> </tr> </table>	Total number of custom solutions	19	Recreate using Flow	19						
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Recreate using Flow	19										

Roadmap Overview

Migrating from SharePoint to O365 can be a straight forward task of copying your sites and content. Some issues might arise with custom forms, workflows and solutions, but it could be accomplished in as little as 3 months. However, this approach will not help with the increasing volume and complexity of data that organizations are facing daily. Effectively managing and governing this information is important for:

1. Helping your organization create and share knowledge effectively and be more agile
2. Obtaining compliance with industry regulations and internal policies
3. Reducing the risk in the event of litigation or a security breach

A comprehensive migration strategy should help foster collaboration and strong teams, drive user adoption, and modernize the way you work. It would include a strategy and plan for items such as:

- Information and Records Management
- Better organization of sites and content
- Ensuring your content is safe and secure
- Maximizing your investment by using the full capabilities of O365
- Educating your users on how to best use the tools they are provided
- Continuing your success through governance, on-going training, and maturing O365 within your organization

This roadmap is developed for CDIC based on an analysis of their current farm and an understanding of their overall vision and business objectives. It includes a high-level plan, estimated timelines, and recommendations based on Microsoft and industry best practices.

Work Break Down Structure

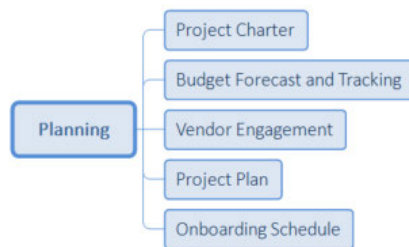
This section will provide a high-level plan that CDIC can use to understand the activities and tasks for their migration. Most of the tasks are explained in detail further in the document. It might be useful for readers to review the entire document before dissecting this content.

The tasks are broken down into the following project delivery phases:

- Planning
- Design
- Execution

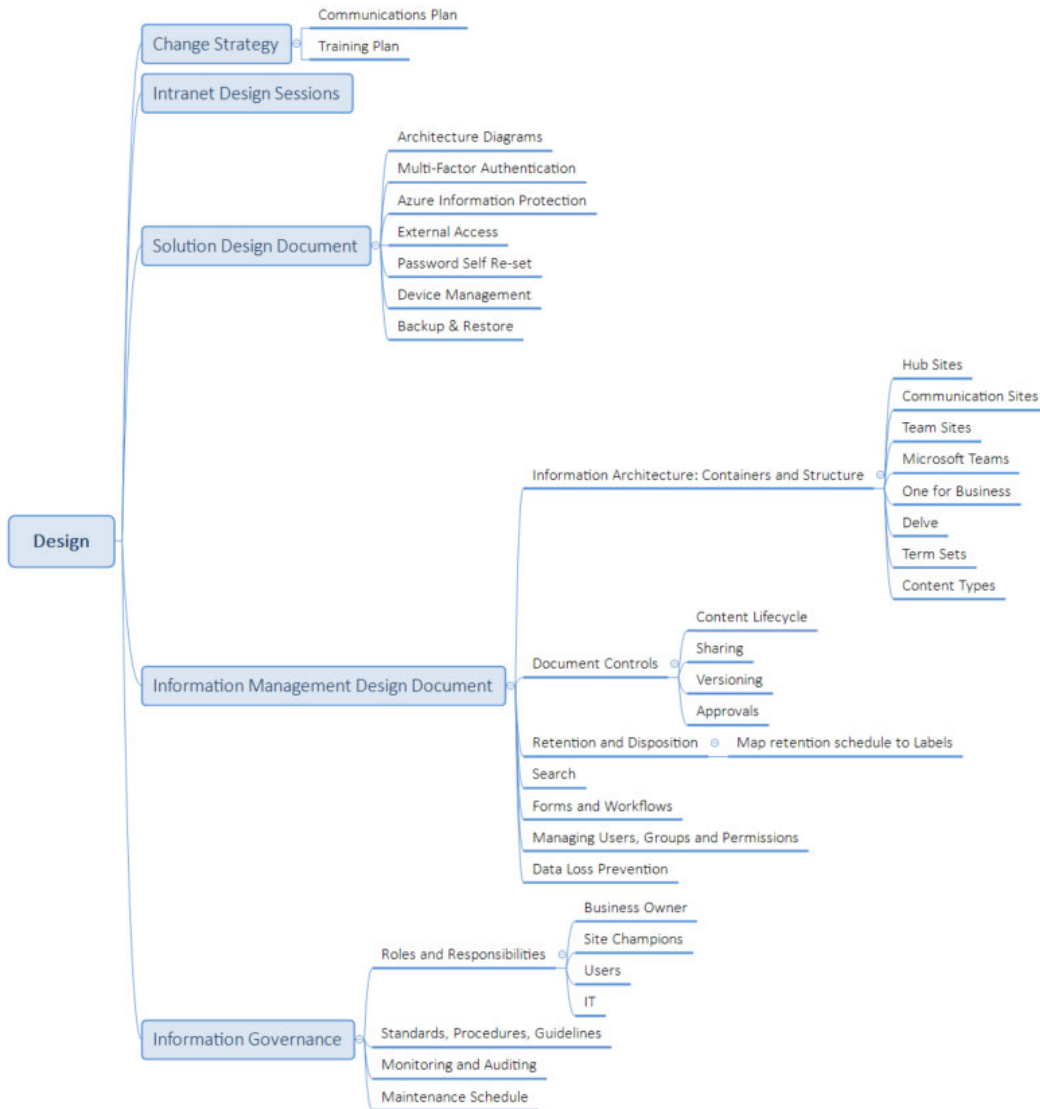
Planning

The goal of this phase is to engage executives and key stakeholders to establish roles and responsibilities, scope, budget, resourcing, and measures of success. By setting these expectations up front, the project team can understand the parameters they are working with. Project governance structure must be established so the project team knows who is responsible, accountable, consulted, and informed as they start on the Design and Execution phase. Any project changes or decisions must be documented and approved for consensus and transparency (scope, budget, resourcing, etc.).



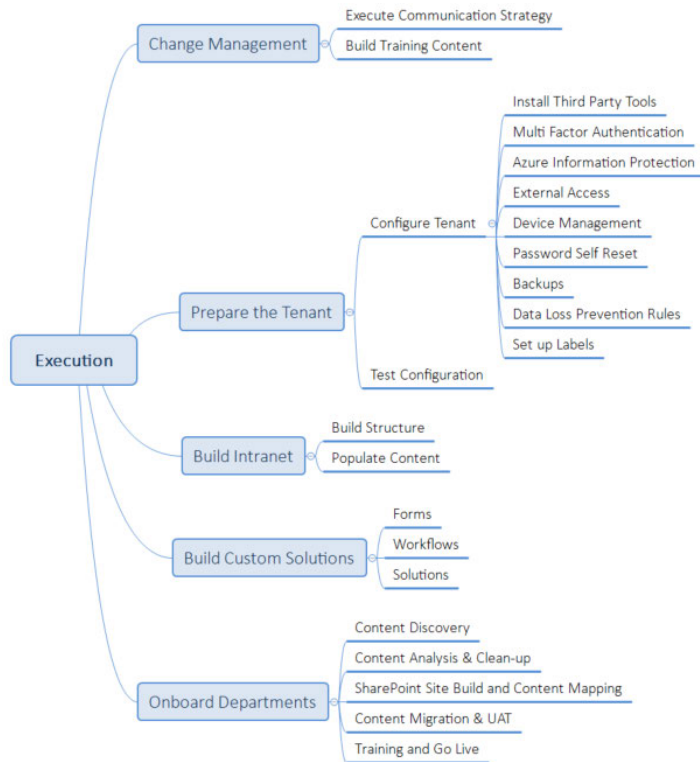
Design

The goal of this phase is to document the intended solution while making decisions and getting approvals along the way.

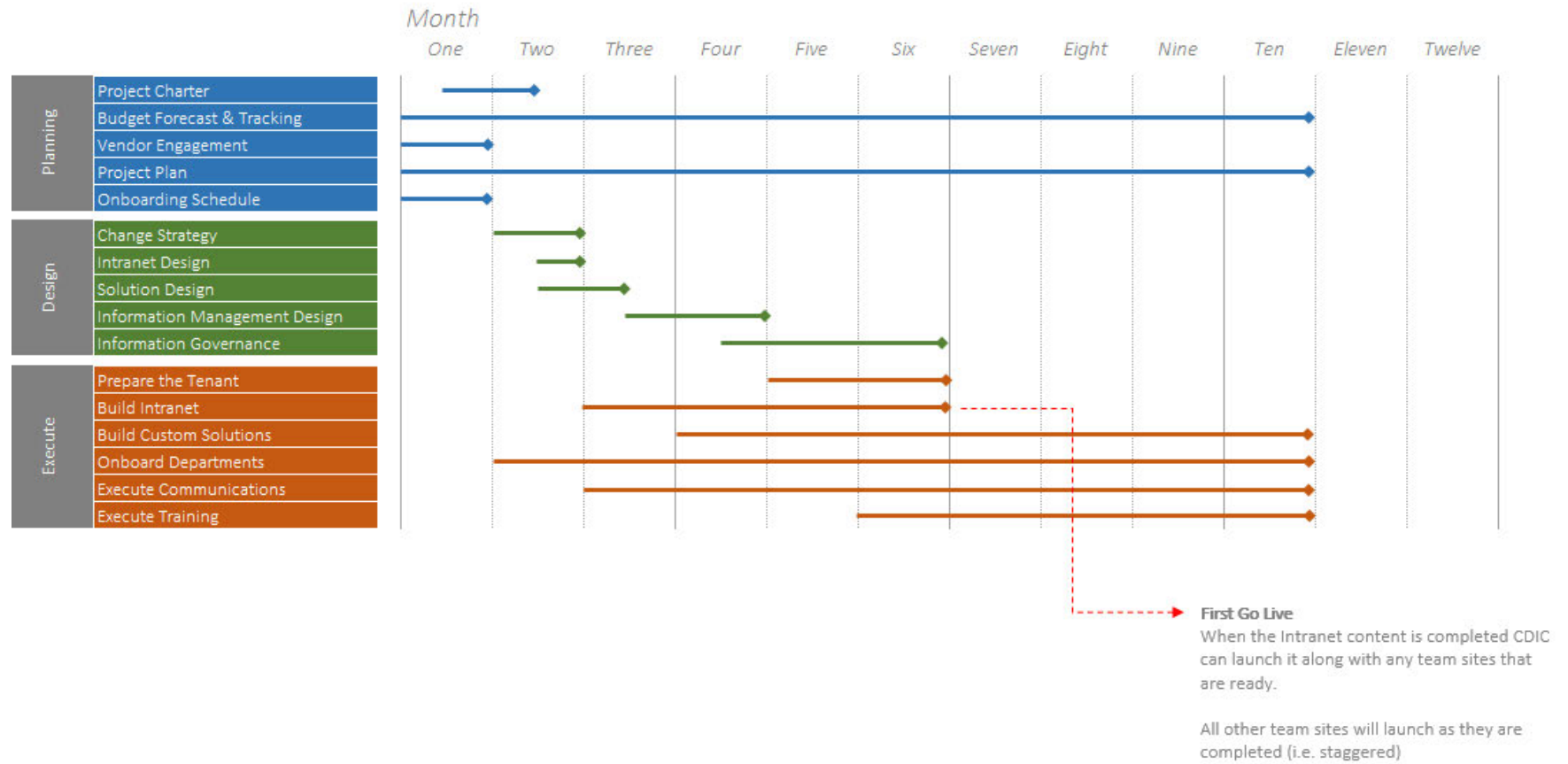


Execution

This phase is where the everything gets built and implemented (or executed). The expectation is to follow the design and processes established during the Design Phase. It is normal to have some differences or deviations when building the solution. In these situations, the design documents should be updated to reflect those changes. This will ensure CDIC has an accurate reflection for supporting and maintain the solution.



Timelines



Information Risks and Cybersecurity

Cloud based services have been readily accepted by consumers for many years. Individuals are already comfortable, or possibly unaware, about the risks of storing personal information and files on services such as Dropbox, Google, Facebook, etc. The benefits of being able to automatically sync, share, and access their data from any device anywhere is convenient and efficient. Getting these services packaged into a single solution with a simple monthly payment is an attractive offer.

This service offering is also very attractive for organizations. However, the biggest hurdle for Microsoft is how to convince companies that their information is secured and safe from both malicious and unintentional incidents. This is why Microsoft has made a large investment in not only creating a secure infrastructure, but also supplying supplementary services focused around Security and Compliance for O365.

Most of these services are included for free with enterprise licensing. Organizations must decide how to best use these features based on their business needs and culture. The following sections outline the recommendations for CDIC.

Multi-Factor Authentication

Multifactor Authentication (MFA) is the process of identifying users by validating two or more “factors” that are unique to that user. It adds an additional layer of protection and security against one of the most common types of breach, compromised credentials. This will allow an organization to compensate for an otherwise weakness within a cloud-based service such as O365. Unwanted access to email and information could harm an organization legally, monetarily, or reputationally.

It is recommended that at a minimum, MFA is enabled for privileged accounts, however a best practice is to enforce it for all users.

Microsoft has different service offerings for MFA depending on your needs. It is included in O365 subscriptions however configuration options are not as comprehensive as Azure AD Premium (P1 or P2). One of the primary features missing from O365 MFA is the ability to whitelist IP addresses allowing users signing in from corporate networks to skip the second factor. This option is available in Azure AD Premium however it comes at a cost.

It is also important to know that O365 MFA applies to both web browser and application authentication. This means applications such as Outlook or Skype will require a special “App Password”, entered one time only, before they can be used.

For web based logins, users will have to provide a second factor on almost every login (users can choose to stay logged in on a specific PC). Users have three options for their second factor:

1. Phone call requiring users to hold the # symbol to authenticate
2. Text message with a unique code that users will have to enter in the web browser
3. Microsoft Authenticator app providing a pop up on their cell phone to click approve.

Out of the three options, the Microsoft Authenticator app provides the best user experience.

The following Microsoft article provides instructions for both admins and end users for MFA in O365:

<https://support.office.com/en-us/article/set-up-multi-factor-authentication-for-office-365-users-8f0454b2-f51a-4d9c-bcde-2c48e41621c6>

External Sharing

O365 external sharing provides the ability to share content with people outside of your organization. There are two types of external sharing that organizations can configure based on their user needs and preference for security risk. Some organizations choose to disable it entirely which can lead to other problems such as employees using other third-party tools (e.g. Dropbox, Google) to send documents. This could result in organizations losing control over what is shared externally. It is recommended to configure external sharing settings to the needs of your organization rather than simply turning it off.

Anonymous Access

A folder or document can be shared with an external user via an anonymous link, meaning the person accessing the document can't be identified by the organization. These guest users are commonly called "anonymous users".

When this option is chosen, your document will be visible to anyone who has access to the link, meaning an external user to whom it was sent to directly can share the link to other external users. Thus, documents containing sensitive data should never be shared this way.

The person choosing to send a document anonymously can decide whether to make it "View Only" or "Editable". They can also set an expiration date, so the content isn't accessible to external users after the chosen date.

In essence, the permissions to access your content is given to the hyperlink and not a user.

Authenticated External Users

Content can also be shared with authenticated external users, meaning guest users are sent an invitation by email and prompted to sign in using an account from a trusted provider to access the content in question.

Once the invitation is accepted, they are added to your organization's directory as an external user but will only have access to the specific elements you shared with them.

It is recommended that CDIC does turn on external access however does it in a controlled manner. Turning off anonymous access and requiring authenticated external users provides better control and auditing.

The following Microsoft article walks through the various options and how to configure them for your tenant:

<https://docs.microsoft.com/en-us/sharepoint/external-sharing-overview>

Password Self-Reset

Allowing users to change or reset their password can reduce the number of requests to an organization's helpdesk. It is recommended that this feature is turned on and promoted to users through training.

The following Microsoft article explains how to enable this feature for your tenant:

<https://support.office.com/en-us/article/let-users-reset-their-own-passwords-in-office-365-5bc3f460-13cc-48c0-abd6-b80bae72d04a>

Device Management

A major benefit for organizations moving to O365 is the ability for users to access content on their phones and other mobile devices. This can expose organizations to additional security and information risks however O365 provides Mobile Device Management to align mobile devices with corporate policies. Policies can include items such as:

- Requiring all devices to have a password
- Defining the strength and expiration policy for passwords
- Setting the number of incorrect logins before the device is wiped (preventing brute force attempts)
- Requiring data at rest encryption
- Not allowing jail broken devices

It is recommended that at a minimum:

1. Organizations turn on MDM in O365
2. Require devices to have a password
3. Set the strength and expiration policy to align with corporate standards
4. Don't allow jail broken devices

The following Microsoft article explains how to setup and configure MDM:

<https://support.office.com/en-us/article/set-up-mobile-device-management-mdm-in-office-365-dd892318-bc44-4eb1-af00-9db5430be3cd>

Backup and Restore

It is important to understand the provided backup strategy for O365 subscriptions to determine if it meets your organizational needs.

Backups are performed every 12 hours and retained for 14 days. Restorations can only be completed for site collections and sub-sites, not for specific files, lists, or libraries. This can protect organizations in the event a site collection or sub-site becomes damaged beyond repair and requires a restore.

Deleted content (includes site collections, sites, lists, libraries, and files) is sent to the recycle bin before it is permanently deleted (much the same as Windows operating system Recycle Bins). There are two different recycle bins called stages. The first stage is available to end users while the second stage is only available to administrators. The total retention time for both stages is 93 days.

For organizations that are used to a robust backup strategy with multiple years of retained data, this can introduce a new risk and needs to be explained to business content owners. There are multiple 3rd Party backup tools that integrate with O365 to provide offsite backup and restoration functionality. Before migrating to O365 it is recommended to discuss if your organization will require offsite backup with longer retention.

Dealing with Sensitive Information

A common concern when migrating documents and records to O365 is how sensitive or confidential information will be controlled. O365 includes Data Loss Prevention (DLP) and Azure Information Protection Services to reduce and possibly eliminate this risk.

Data Loss Prevention

DLP provides the ability to identify, monitor, and protect sensitive information across Exchange, SharePoint, and OneDrive within O365.

Identification is performed by pattern matching items such as credit card numbers, SIN, addresses, etc. Microsoft provides many predetermined patterns based on regions (e.g. Canada) however an organization can create their own as needed.

Creating a DLP rule allows an organization to block access to any document that contains sensitive information. Only site administrators, the document owner, and last modifier will have access. You can allow users to provide business justification to share this content with additional people should you need this flexibility.

Monitoring includes notifications and reporting to help administrators and compliance officers stay on top of sensitive or confidential information stored within the O365 tenant.

It is recommended to turn on DLP for known sensitive information types across your organization. The following Microsoft article explains the details around DLP and how to configure:

<https://docs.microsoft.com/en-us/office365/securitycompliance/data-loss-prevention-policies>

Azure Information Protection

A cloud-based solution, that is included in O365 enterprise licenses, that will help organizations classify and protect information. It integrates with Office Suite and Exchange Online to provide manual or automatic tagging of documents based on their security level (e.g. Confidential, Internal, Public). Once the document has been tagged, Organizations can define rules such as the ability to print, attach to an email, download, etc. It can also add headers, footers, or watermarks to the document to let the reader know if they are viewing sensitive information.

The following Microsoft article provides more detail: <https://docs.microsoft.com/en-us/azure/information-protection/what-is-information-protection>

The following items are recommended for CDIC:

- Setup and install Azure Information Protection for Office and Exchange
- Start with defining minimum rules to protect sensitive content only (rules can be added and matured over time)
- Raise user awareness about information risks and cybersecurity through campaigns
- Train users how to protect their documents.

Using the right tool for the job

Microsoft Office 365 is a cloud-based service designed to meet your organization's needs for robust security, reliability, and user productivity. It offers a collection of web-based tools that help you collaborate and communicate across many devices using multiple services. It is important to understand and decide how your organization will be using these tools. The following sections will outline recommended tools based on the content inventory and analysis, and overall vision for CDIC:

OneDrive

Organizations often get confused as to what OneDrive for Business is. It has a history going back to 2007 starting with an unsuccessful file syncing tool called Groove. In 2010 Groove was integrated into SharePoint and rebranded to "SharePoint Workspaces", which eventually became a separate syncing tool called "SkyDrive". At the time, SharePoint also had a user file storage feature called "My Sites". With the rising popularity of Dropbox and Google, Microsoft decided to combine these two tools and create a business class offering branded as "OneDrive for Business". It includes two primary functions:

1. Cloud based file storage for users that can be accessed on any device, anywhere
2. A desktop syncing tool for both OneDrive and SharePoint libraries

Key features include:

- Providing users a private area to store and work on documents
- Desktop synchronization for both OneDrive and SharePoint content allowing for
 - Realtime cloud backup of files stored on user's desktop
 - Full SharePoint collaboration such as co-authoring and version control for files stored on user's desktop
 - Offline access to both OneDrive and SharePoint documents
- Integration with Windows 10 file system allowing users to pick and choose what local content to synch or store in cloud only (freeing up hard drive space)

OneDrive for Business is a critical tool for organizations moving to O365. It can help with user adoption and productivity while reducing corporate information risks of unmanaged content sitting on user's work and personal computers. From an Information Management perspective, it plays a key role by providing users a personal storage location that would otherwise be met by network drives. This allows:

- Users to take advantage of SharePoint collaboration features (e.g. co-authoring, version control, sharing)
- Content to be feed into Delve for a better user experience
- Organizations to apply security and compliance policies to manage, retain, and dispose content
- Managers access to content when a user leaves organization

Roadmap Recommendations

- Install or provide users ability to install OneDrive syncing app on their desktop.
- Make OneDrive the default “save” location in Microsoft Office Suite (e.g. Word, Excel, PowerPoint)
- Migrate MySite content into OneDrive for Business
- Raise awareness and train users on features and best practices

Delve

Delve is a hub designed to bring information together for each user. It is personalized based on the information that the signed in user and their colleagues are currently working on. Users can leverage Delve to manage their O365 profile, and to discover and organize the information that is most interesting to them.

Key features include:

- View your recent documents and email attachments regardless of where they are stored in OneDrive or SharePoint
- Keep track of your favorite documents or sites
- Organize content across any location in OneDrive or SharePoint into “Boards” for yourself and to share with other users
- Discover popular documents that people around you are working on (based on permissions)
- Find people by browsing org charts or searching names, skills, or projects they are working on

For more information on Delve [click here](#)

Roadmap Recommendations

Delve can help drive user adoption as it provides value to users (i.e. WIFM). It is recommended that CDIC includes it as a focus for communication and training during the O365 Migration.

Teams

Teams is relatively new to O365 however Microsoft has not been shy in promoting it as a primary focus for their roadmap and future product development. It is the next level of maturity for O365 which currently has many different apps that can be used for communication (email, skype, newsfeed, SharePoint, etc.) and storing information (SharePoint, OneDrive, OneNote, Planner, etc.). The goal is to simplify creating and using these tools in a single interface that also offers corporate level controls such as security, compliance, auditing, retention, etc.

Microsoft is going as far as decommissioning other tools (e.g. O365 Groups, Skype, StaffHub, etc.) as they are being rolled into Teams. Therefore, organizations are being encouraged to embrace Teams as it is clearly the focus for Microsoft and will receive the most attention. It is described as a hub for teamwork and it offers a single interface that integrates O365 tools such as:

- Skype instant messaging, phone calls, virtual meetings
- Newsfeed, SharePoint Site, OneNote, Planner, and other apps grouped by a topic or project (called Channels)
- Outlook Calendar allowing users to view and book meetings
- Connectors providing integration with 3rd Party services such as Trello, SurveyMonkey, Wrike, MindJet, Adobe Sign, etc.
- Yammer

For more information on Teams [click here](#)

Roadmap Recommendations

With the focus Microsoft is placing on Teams, it is recommended that CDIC takes the time to plan for teams and communicate and train users on the approach:

1. Decide and configure tenant settings for teams
2. Document and communicate governance and best practices (e.g. naming conventions, when to create a team, how to use channels, etc.)
3. Put effort into awareness and training (e.g. initial user training, lunch and learns, help centre for users)

The following list highlights possible Teams within CDIC:

Business Collaboration Teams	Annual Report Team (CorpPM)	Health and Safety Committee (CorpPM)	Security Committee (CorpPM)
	Information Governance Team (CorpPM)	Legal Opinions and Interpretations (Legal)	
Technology Collaboration Teams	Cybersecurity (IS)	ITIL & Security (IS)	Project Sites (IS)
Resolution Simulations	Monthly Simulations		

Planner

Planner is an easy to use, visual tool that allows users to plan and organize tasks to help achieve a goal. It is fully integrated into O365 suite of tools and is especially powerful when used in SharePoint Sites or Teams.

Key features include:

- Create boards within a plan to group tasks into logical categories
- Create tasks and assign owners, due dates, add notes and files
- Track progress of plans and tasks including a hub showing users and managers rollup of information across all plans
- Integration into O365 SharePoint and Teams for better collaboration

Roadmap Recommendations

Planner can help users plan, organize, and track tasks to achieve a specific goal or project. Often this functionality is mimicked in a SharePoint list or using other tools that don't have the ability to send out reminders or track and monitor progress. Being able to view tasks across all plans can help users visualize their workload and stay on top of things. In addition, managers and executives can easily view dashboards that provide a summary of progress, remaining work and timelines.

- Document and communicate governance and best practices for Planner (e.g. naming conventions, how to setup boards, adding to Teams or SharePoint sites, etc.)
- Put effort into awareness and training (e.g. initial user training, lunch and learns, help centre for users)

OneNote

OneNote is a note taking app with lots of great features like sharing, and integration with Outlook to save emails and record meeting notes. It is one of the best Microsoft tools that most organizations have but don't use. Most users prefer their physical notebook and have a negative reaction to OneNote. However if some time is taken to raise awareness and train users, it becomes a must have tool for users, and also organizations trying to reduce the risk of paper notes (loss of information and confidentiality concerns).

Roadmap Recommendations

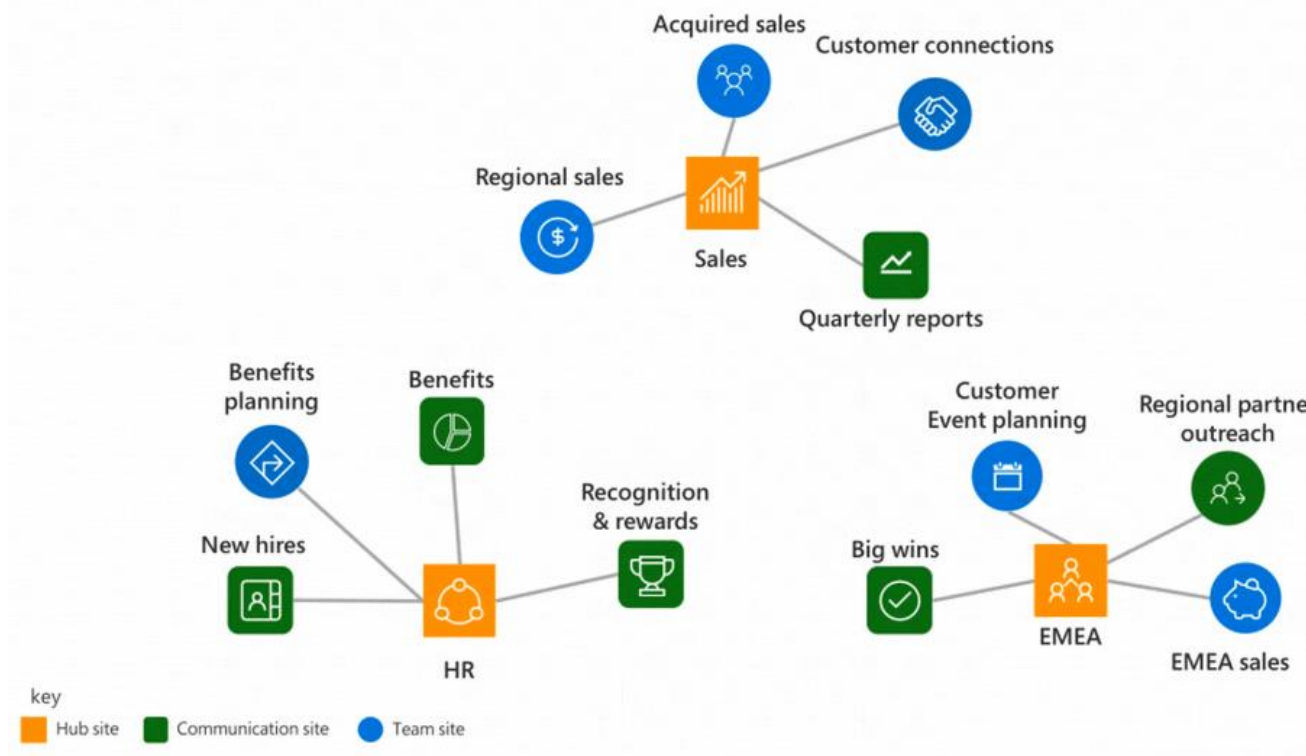
OneNote is great for organizing, storing and sharing notes however there are some key scenarios that should be promoted for business use:

- Leverage OneNote to:
 - Reduce risk of losing paper notes resulting in loss of information, hours of work to recreate, or confidential information falling into the wrong hands.
 - Organize and keep emails (Outlook integration makes it easy to send emails to OneNote)
 - Keeping meeting minutes (Outlook integration automatically inserts meeting time, subject, attendees and share notes with participants)
 - Create shared Knowledge base
- Document and communicate governance and best practices (e.g. saving emails, meeting notes, etc.)
- Put effort into awareness and training (e.g. initial user training, lunch and learns, help centre for users)

Microsoft Hub, Communication and Team Sites

Creating a modern Intranet in O365 is easy and quick using Hub, Communication and Team Sites. The concept is to build either Team or Communication Sites and then use Hub sites to tie them together for common navigation, look and feel, and rollup of content such as news. Companies might create hub sites based on Organizational Structure, Geographical Locations, or Related Topics such as HR, Sales, etc.

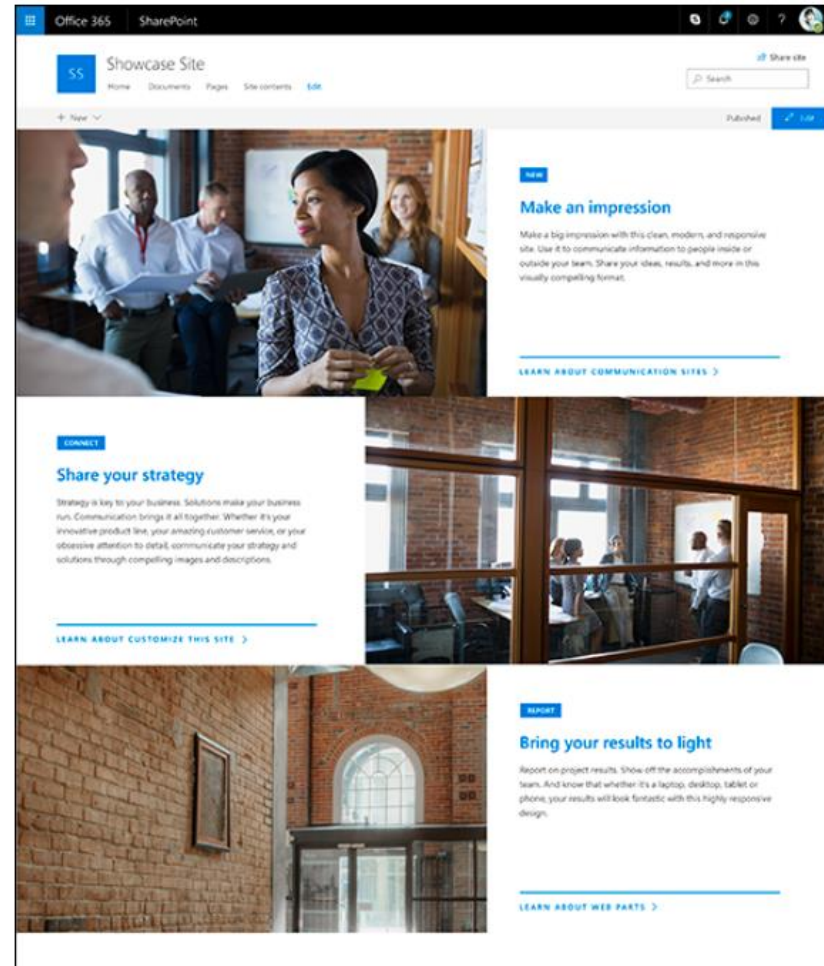
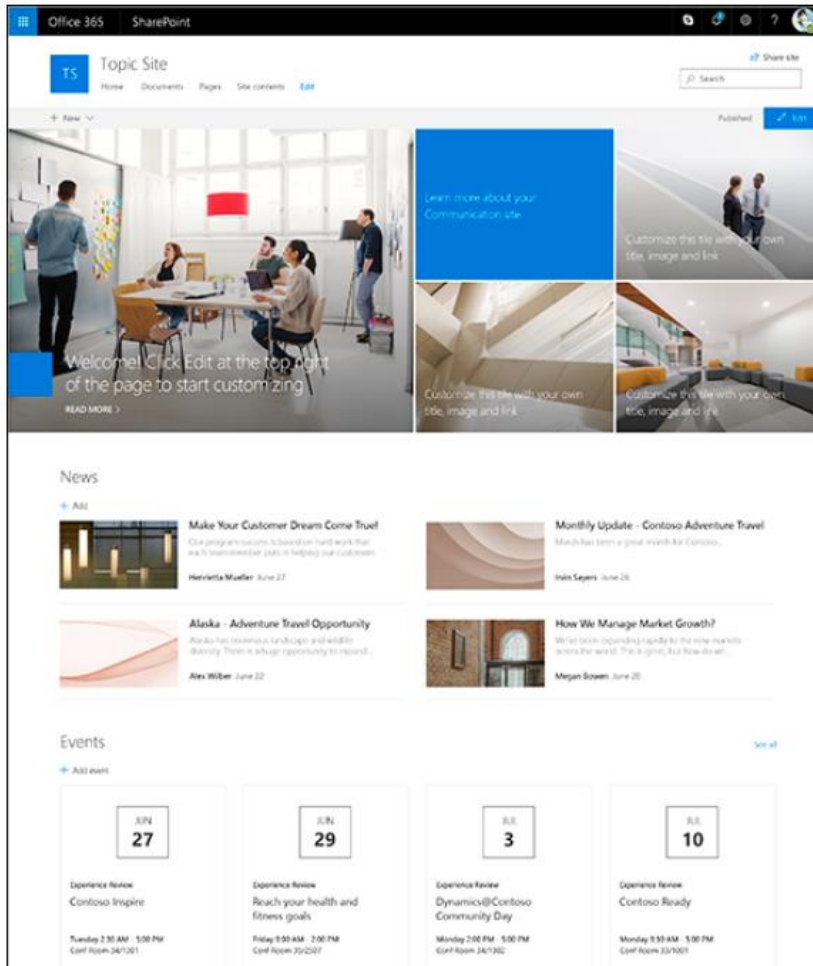
Traditional structure for SharePoint sites required a hierarchy with parent and child sites typically based on ownership. With hub sites, the relationship is based on links that can be easily changed to allow for organizational change.



	Team Site	Communication Site	Hub Sites
Primary business objective	<p>Collaborate</p> <p>When you want to create a place where the members of a work group or project team can work together on project deliverables, plan an event, track status, or exchange ideas, you want a team site. Team sites are connected by default to an Office 365 group to deliver a full range of communication and collaboration tools, including Microsoft Teams and Planner.</p>	<p>Communicate</p> <p>When you want to broadcast a message, tell a story, share content for viewing (but not editing), or showcase services or people, you want a communication site. Communication site owners often want to include an engagement component - for example an "Ask Business Development" area on a site communicating information about business development. This is a great place to connect a Yammer group.</p>	<p>Connect</p> <p>When you want to create a shared experience for a family of related sites—to discover related content by rolling up site activity and news, organize related sites so that they share a common navigation, and apply a common look and feel.</p>
Content authors	<p>All members are content authors who jointly create and edit content.</p>	<p>Small number of content authors and a much larger number of content readers or consumers.</p>	<p>Hub site owner defines the shared experiences for hub navigation and theme. Hub site members create content on the hub site as with any other SharePoint site. Owners and members of the sites associated with the parent hub create content on individual sites.</p>
Examples	<p>Project team working together to complete deliverables and manage tasks</p> <p>Holiday party planning committee planning the annual get-together</p> <p>HR performance management team Executive committee—different leadership groups within the organization</p> <p>Extranet site to work with Partner A</p>	<p>Travel team publishing guidelines about corporate travel Policies and procedures</p> <p>Micro-site for a new corporate initiative</p> <p>Resources for the sales team for a product or service</p>	<p>HR hub that provides a connection and roll up for all HR functions, such as benefits, compensation, performance management, talent acquisition, and a manager portal</p> <p>Sales hub providing enterprise resources for the Sales organization and connecting regional sales team and communication sites</p> <p>Location-specific hub that groups the communication and team sites for a specific location (the New York office)</p>

Communication Sites

The new communication sites and modern webparts allow organizations to quickly create beautiful intranet sites with responsive design (i.e. mobile friendly):



For more information on communication sites [click here](#)

Team Site

Team Sites in O365 have a modern look and feel with new webparts such as News, Planner, and Quick Links to help bring content and collaboration together:

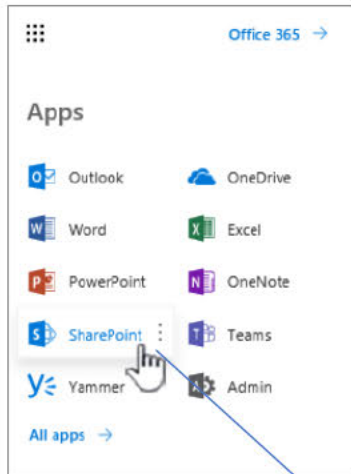
The screenshot shows a Microsoft Teams site for a public group named "Product Launch Event". The header includes the group name, a "Public group" label, a "Following" star icon, and a member count of "16 members". Below the header is a navigation bar with a "+ New" dropdown menu and "Published" and "Edit" buttons. The main content area is divided into several sections:

- News:** A section with a "+ Add" button and three news items:
 - Beta Testing Results:** "Results are in from our pre-launch consumer beta testers. Although we have a few tasks ahead as a result of this effort, we are on track for a..." by Jordan Miller, October 15, 2017.
 - New York Launch - Lessons Learned:** "The team from the New York launch is presenting a lessons learned brown bag this Friday at 12:00 pm." by Nehal Langer, October 15, 2017.
 - Device Bar Layout Near Final:** "The device bar layout for the product launch event is nearly finalized. Please review the layout in the team files and provide any remaining..." by Lela Hellwey, October 15, 2017.
- Media Preview Packages:** "Media preview packages are about to be sent out! The launch team has been working hard to secure representation in major news outlets at..." by Miriam Graham, October 15, 2017.
- Activity:** A section showing recent activity with three items:
 - Documents: "3 files were added" by Megan Bowen, "Added files 18 minutes ago".
 - Event list: Edited by Megan Bowen, "Edited the list 18 minutes ago".
 - Documents: "NYC Launch Lessons Learned.docx" by Megan Bowen, "Edited 22 minutes ago".
- Comments:** A section with a "Add a comment" input field and a "Post" button.

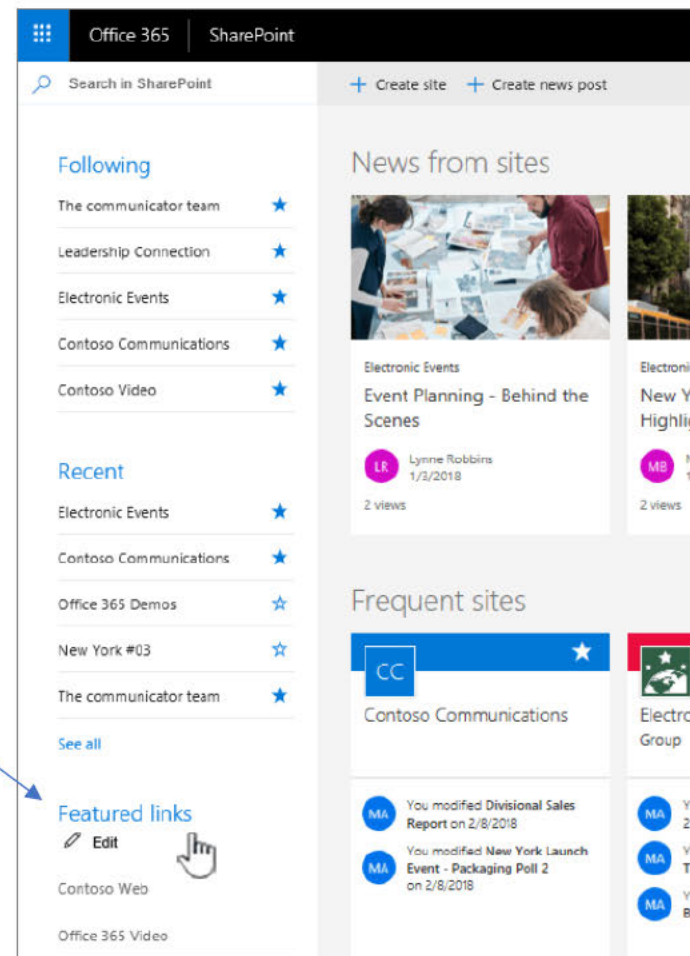
For more information on team sites [click here](#)

Roadmap Recommendations

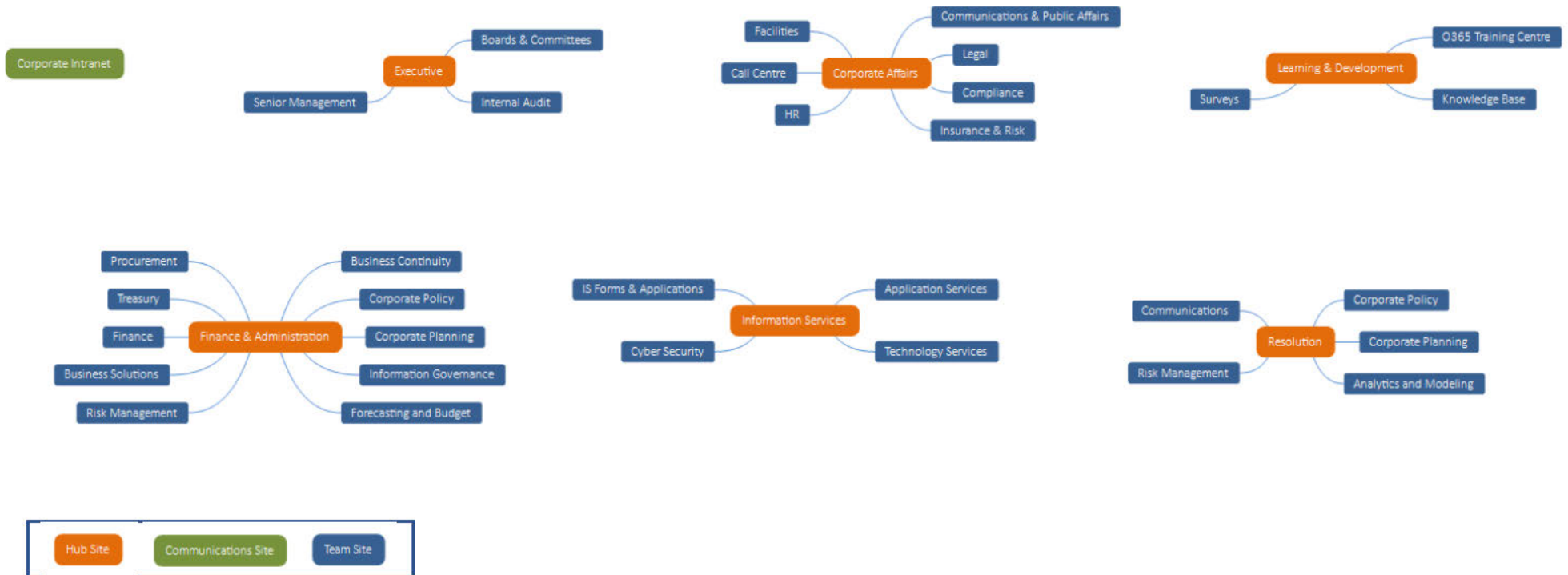
It is recommended for CDIC to use the modern templates to create various Hub, Communication, and Team Sites. At the time of writing this document O365 does not have the ability to create an enterprise navigation that will be consistent across all sites. However, Microsoft has recognized this need and it is in the roadmap for future releases. For the time being, CDIC can add “Featured Links” on the SharePoint homepage to include the primary hub sites.



Add Feature links so they appear on the SharePoint landing page in O365



It will require a few design sessions with key stakeholders to land on a final logical architecture and navigation. Based on the content inventory performed for this roadmap, the following diagram illustrates a possible architecture for CDIC:



Forms

The last published version of InfoPath was 2013 with end of life support in July 2026. It is considered a “dead” product that Microsoft is trying to remove support in O365. It is recommended for organizations that can replace their InfoPath forms to do so. The CDIC migration to O365 is a prime opportunity to align with Microsoft Roadmap.

The forms found during the content inventory can be recreated using a combination of Microsoft PowerApps and Flow. The following table outlines the InfoPath forms found during content inventory and provides recommendations for CDIC migration:

Form	Description	Recommendation	Development Effort
Business Case	<p>Multiple forms in different business areas:</p> <ul style="list-style-type: none"> • SIMB Corporate Business Records • SIMB Business Case • IS Resource Business Case <p>No longer in use.</p>	Convert existing InfoPath forms to PDF (using SharePoint Workflow) and migrate to O365 for archive.	Medium 2-5 days
RAP Comment Tracking	Old RAP comment tracking form. Forms should be converted to PDF for migration as it is no longer used.	Convert existing InfoPath forms to PDF (using SharePoint Workflow) and migrate to O365 for archive.	Medium 2-5 days
Internal Audit Action List	Custom list form	Recreate form using PowerApps	Small 1-2 days
IS Task Authorizations	Used to request services against standby agreements.	Recreate form using PowerApps	Small 1-2 days
IS Task Authorization Change	Used to issue changes to Task Authorizations already approved.	Recreate form using PowerApps. Would look to merge solution with IS Task Authorization form.	Small 1-2 days
Software Request Form	Used by Technical Services to route software requests for approval.	Recreate form using PowerApps	Small 1-2 days
Hardware Request Form	Used by Technical Services to route hardware requests for approval.	Recreate form using PowerApps	Small 1-2 days
Service Contract / Maintenance Form	Used by Technical Services to routine service contract / maintenance requests for approval.	Recreate form using PowerApps	Small 1-2 days
Under \$500 Form	Used by Technical Services to routine requests under \$500 for approval.	Recreate form using PowerApps	Small 1-2 days

Form	Description	Recommendation	Development Effort
DRVA 5.0 Defect List	Custom list entry form.	Recreate form using PowerApps	Small 1-2 days
Mandate Apps Bug List	Custom list entry form.	Recreate form using PowerApps	Small 1-2 days
ROADMAP Defect List	Custom list entry form.	Recreate form using PowerApps	Small 1-2 days
Test Case List	Custom list entry form.	Recreate form using PowerApps	Small 1-2 days
Test Execution List	Custom list entry form	Recreate form using PowerApps	Small 1-2 days
Contract List	Custom list entry form.	Recreate form using PowerApps	Small 1-2 days

Workflow

O365 can support SharePoint and Designer workflows however it is recommended to recreate the workflows in Flow if possible. This will ensure future compatibility, mobile support, and align with Microsoft Roadmap.

The following table outlines the workflows found during content inventory and provides recommendations for CDIC migration:

Workflow	Description	Recommendation	Development Effort
Contacts Permission Workflow	Assigns item-level permissions to the list based on the office location for the contact	Recreate using Flow	Small 0.5 days
EOIA Tracking List	Used to send reminders when tasks are overdue	Recreate using Flow	Small 0.5 days
Blanket Travel CFO Email	Sends email to the CFO when a blanket authorization is being sent for approval	Recreate using Flow	Small 1-2 days
Set Travel Authorization Permissions	Applies item-level permissions to travel authorization forms based on status and traveller department	Recreate using Flow	Small 0.5 days
Counterparty Limit Report	Routes documents for approvals	Recreate using Flow	Small 0.5 days
Add Publishing Contact	Adds the publishing contact information when a page is created or edited	Recreate using Flow	Small 1-2 days
Assign Action Item Permissions	Assigns item-level permissions so only the project owner and action item owner can edit the action item	Recreate using Flow	Small 0.5 days
Assign Action Item Permissions	Assigns item-level permissions so only the project owner and action item owner can edit the action item	Recreate using Flow	Small 0.5 days

Workflow	Description	Recommendation	Development Effort
Action Items Auto Assign Permissions	Assigns item-level permissions so only the project owner and action item owner can edit the action item	Recreate using Flow	Small 0.5 days
Assign Action Item Permissions	Assigns item-level permissions so only the project owner and action item owner can edit the action item	Recreate using Flow	Small 0.5 days
Task Authorization Workflow	Sends emails based on the status of the Task Authorization.	Recreate using Flow	Small 0.5 days
Task Authorization Change Workflow	Sends emails based on the status of the Task Authorization Change.	Recreate using Flow	Small 0.5 days
ISA HW	Routes a form for approval	Recreate using Flow	Small 0.5 days
ISA Service Contract	Routes a form for approval	Recreate using Flow	Small 0.5 days
Workflow Software	Routes a form for approval	Recreate using Flow	Small 0.5 days
Under \$500	Routes a form for approval	Recreate using Flow	Small 0.5 days
Bug ID	Sets the bug ID column to the item ID column	Recreate using Flow	Small 0.5 days
Test Number Sequential	Sets the MyID column to the item ID column	Recreate using Flow	Small 0.5 days
Email Execution	Sends an email to the individual assigned to the item	Recreate using Flow	Small 0.5 days

Custom Solutions

Most on-premise custom solutions are not compatible with O365 or easily migrated. In many cases, it is better to recreate the solution using different technology that is supported and aligned with Microsoft best practices.

The customizations found during the content inventory can mostly be recreated using a combination of Microsoft PowerApps, Flow, and Search Query with XLST. The following table outlines the customized solutions found during content inventory and provides recommendations for CDIC migration:

Name	Description	Recommendation	Development Effort
User Profile Editor	Allows HR to edit user profiles in SharePoint.	User profiles are a part of O365 and include features such as delve cards, interactive org charts, quick contact, people search, etc. Recommend leveraging out of box functionality and training users on features.	N/A
Checked out files report	Sends an email report of all files that are checked out SP.	In O365 the default library setting does not require check-out. In addition, checking out documents are against best practice as it will block the ability to co-author documents. It is recommended to change user behaviour through communication, training, and coaching to promote co-authoring and discourage checking out a document.	N/A
Contract Portal	This solution consists of XSLT customizations for filtering and displaying business cases and contracts.	Rebuild customized page(s) in O365 using JavaScript and Search Query Webparts.	Medium 5-10 days
Travel Authorization	Allows users to get pre-approved for planned travel. Currently an InfoPath form with workflow.	Recreate solution in O365 PowerApps and Flow.	Small 2-5 days
Legal Opinion & Interpretations	Allows the Legal Team to search and manage Opinions and Interpretations. Built using JavaScript to offer customized library views and search	Rebuild customized page(s) in O365 using JavaScript and Search Query Webparts.	Medium 5-10 days

Name	Description	Recommendation	Development Effort
IS Resourcing Site	Site that allows for business areas to request IS resources to perform a project or task. Multiple custom forms and workflows with reporting.	Recreate solution in O365 PowerApps and Flow.	Medium 5-10 days
CDIC Common	Allows common elements and styles to be re-used across Farm. Also used to select language for sites and change displayed language in webparts.	<p>Would recommend leveraging O365 out of box webparts and look and feel functionality to deliver a consistent and mobile friendly user experience.</p> <p>For bilingual support, the PointFire addon for O365 will automatically change the language based on user preference.</p> <p>Recommend to not migrate solution.</p>	N/A
CDIC Compliance	Allows the Legal Team to manage a yearly process to ensure compliance with regulatory and other requirements. The solution creates a check list that allows business groups to review and record their compliance for each requirement.	Recreate solution in O365 PowerApps and Flow.	Medium 5 - 10 days
CDIC Project Management	<p>This solution allows for a consistent template for project management materials. Solution consists of a web part that pulls action items, documents and agenda items together for a selected meeting and meeting date.</p> <p>This solution is dependent on metadata being used to identify the meeting as well as a jquery script embedded on the home page.</p>	Recreate solution in O365 using combination of Search Query and custom pages.	Medium 5 – 10 days
CDIC EOIA	This solution consists of a web part to allow users to easily search for presentations and conference materials posted in the EOIA site.	Leverage out of box O365 Search Query webpart	Small 2 – 5 days

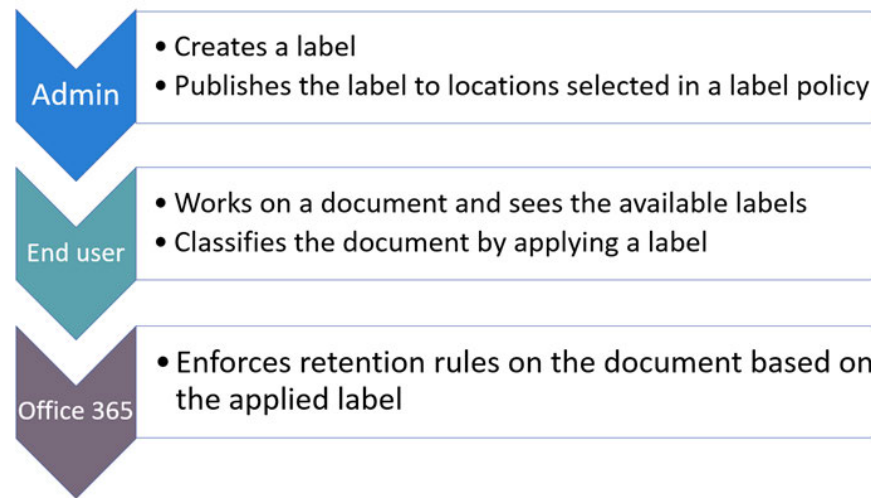
Name	Description	Recommendation	Development Effort
CDIC Member Portal	<p>This solution consists of all customizations in the shared Member Portal and include web parts for displaying information, searching, obtaining news/stock quotes as well as administrative pages to manage the site and permissions. Recent additions include the new RAP workflow process.</p> <p>Existing web parts to obtain news and stock prices are no longer working due to changes in the source sites and these elements may no longer be required.</p>	Recreate sites and customizations using Microsoft recommended solutions.	Large 10-20 days
CDIC Publications	This solution consists of a web part to allow users to easily search annual reports, corporate plans and corporate plan summaries in the Publications site.	Leverage out of box O365 Search Query webpart	Small 2 – 5 days
Finance Search	Custom search solution within Finance site	Leverage out of box O365 Search Query webpart	Small 2 – 5 days
Corporate Policy Portal	This solution consists of customized XSL to display corporate policies in a hierarchical format.	Recreate using O365 Search Query webpart	Small 2 – 5 days

Document and Records Management

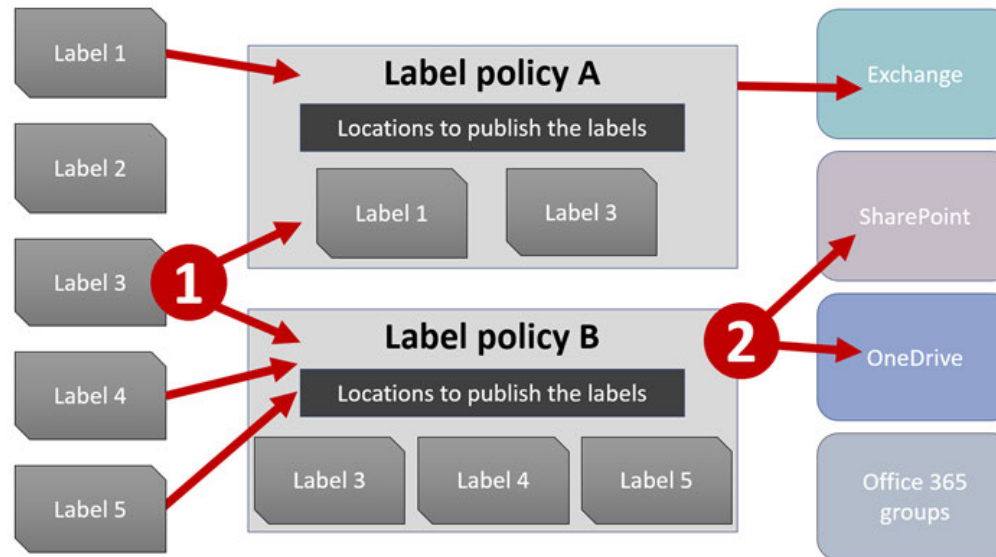
Document and Records Management is the professional practice of managing the records of an organization throughout their life cycle, from the time they are created to their eventual disposal. This includes identifying, classifying, storing, securing, retrieving, tracking and destroying or permanently preserving records.

Within O365 this is achieved by using Labels. Labels can be applied either manually or automatically if the content meets certain conditions (set by administrators when defining the label).

Making labels available to users in your organization so that they can classify content is a two-step process: first you create the labels, and then you publish them to the locations you choose. When you publish labels, a label policy gets created.



Labels are reusable objects that can be included in a policy that is published to different locations. Label policies can be applied to multiple services in O365 such as Exchange, SharePoint, OneDrive, and Teams. This provides the ability to include emails and documents stored across O365 in your document and records management planning.



The following Microsoft article provides more information on how labels work in O365: <https://support.office.com/en-gb/article/Overview-of-labels-af398293-c69d-465e-a249-d74561552d30#howlabels>

To better understand how labels are used to achieve a retention strategy in O365, please review the following Microsoft article: <https://support.office.com/en-gb/article/overview-of-retention-policies-5e377752-700d-4870-9b6d-12bfc12d2423>

To properly plan and implement a records management strategy in O365, CDIC will have to create an Information Management Design Document outlining the requirements and design within their tenant. It is recommended that CDIC engages a vendor that has experience implementing records management in O365 to produce this deliverable.

Onboarding Departments

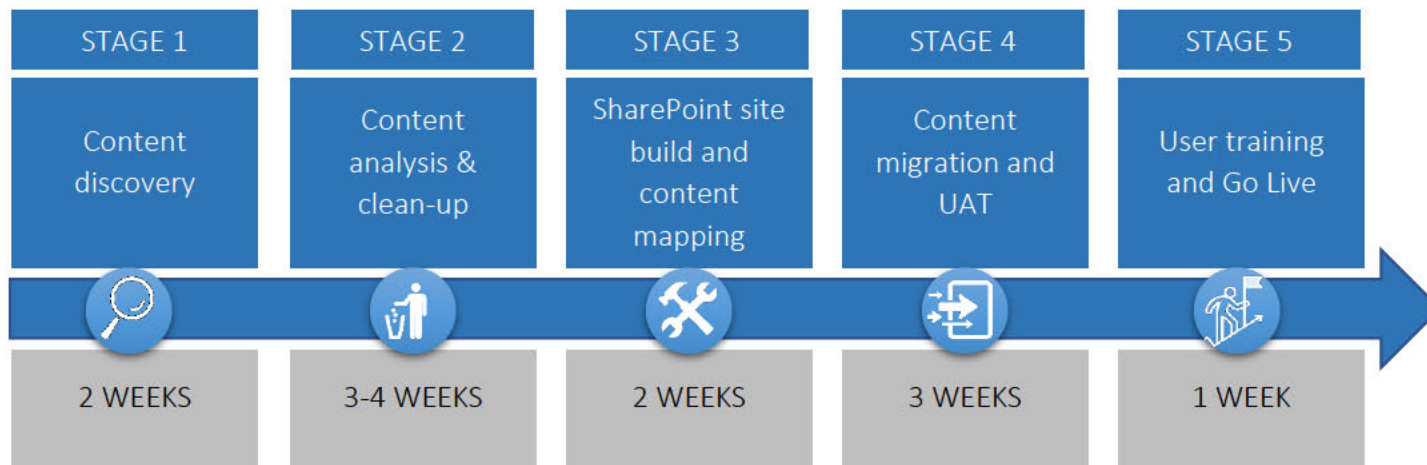
Creating Team Sites for each department will require an experienced SharePoint Business Analyst(s) to interview each team to gain insight into:

- a. The types of content that they create and work with
- b. How they like to work with the content
- c. Forms and business processes
- d. Who they collaborate with
- e. Permissions

Using this information, a schema can be created for the initial site structure, metadata, forms, workflows, and permissions. The purpose is to build a site based on how each team functions and interacts with their content to gain efficiency and better user experience.

When the initial interviews and site builds are complete, the SharePoint Business Analyst will help facilitate content clean up and migration.

The following diagram illustrates the entire process:



Please note that durations are an average based on previous projects. Larger teams will require more time, smaller will require less.

It would be almost impossible for the SharePoint Business Analyst to meet with every user. Therefore, it is a best practice to assign “Site Champions” to represent each team. The site champion will be responsible for:

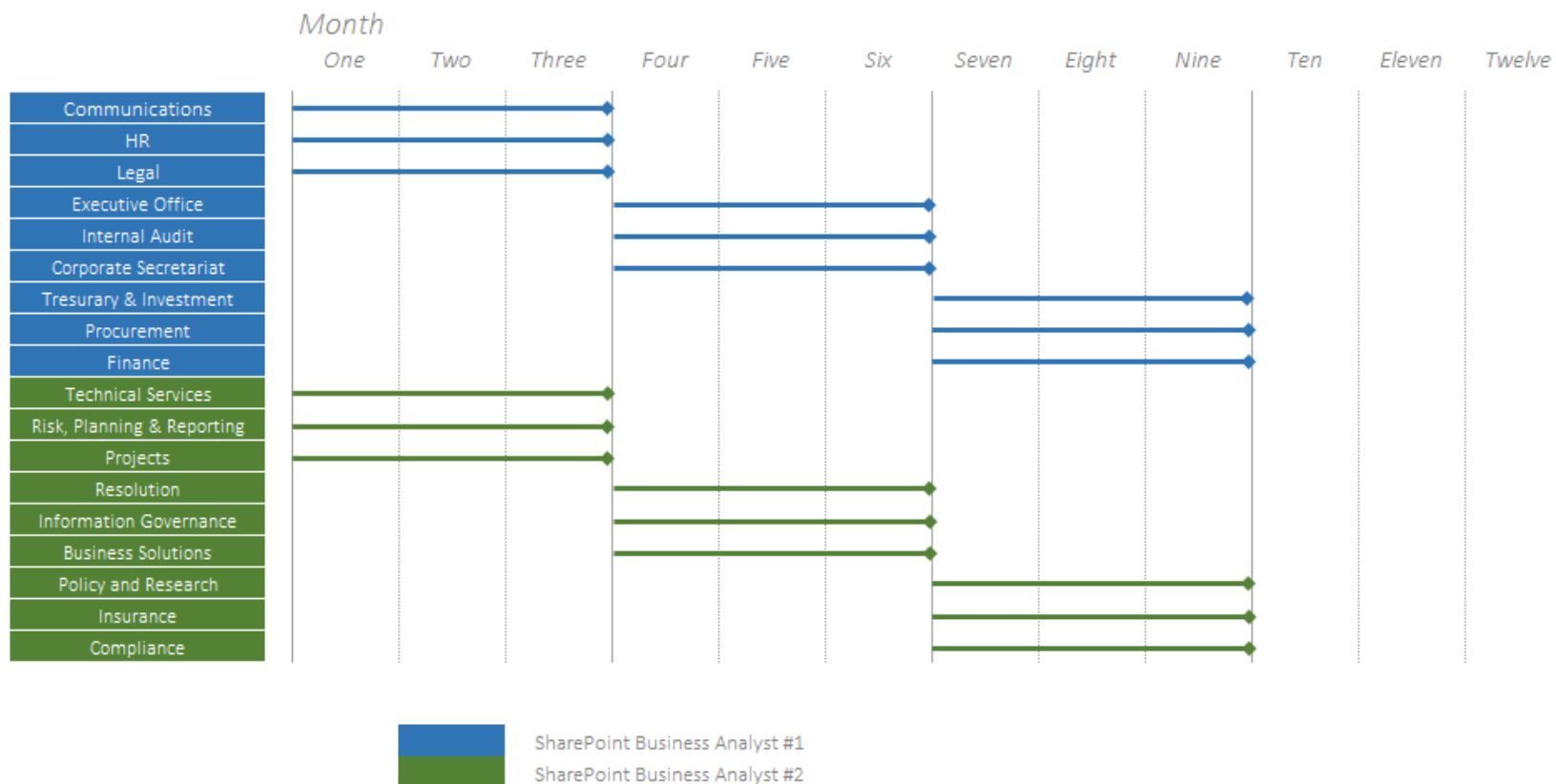
- Collaborating with the Project Team to build new team sites
- Evangelists for SharePoint and O365 within peer group
- Build awareness through informal communication channels
- Assist in welcoming new users, providing guidance, and best practices
- Provide feedback to Project Team on user engagement and adoption

When engaging a new business team, the SharePoint Business Analyst will present to leadership and key stakeholders to gain buy-in and commitment for the project and provide their Site Champion(s).

Schedule

The onboarding schedule will have to be reviewed and agreed upon by leadership and key stakeholders. The purpose is to illustrate how teams will be migrated using multiple iterations and not an “all at once” go live. It was created with the following assumptions:

- Two SharePoint Business Analysts will be used to onboard teams
- Both SharePoint and Network Drive content is included
- Only a subset of Network Drive content will be cleaned up and migrated (1 – 2 years)
- This is an estimate based on the CDIC Org Charts and content inventory. It is therefore subject to change once a team is engaged



Migrating Content

The CDIC roadmap, and the eventual project, are referred to as O365 migration. For the purposes of this section, migration is referring to the act of migrating content into O365. It should not be confused with all the components required for the CDIC O365 Migration Roadmap or Project. It is expected that the other pieces have been delivered and the tenant is ready for content. It is also assumed that CDIC will be using Sharegate to migrate content.

SharePoint Content

Pre-existing SharePoint content will be migrated as part of the engagement with CDIC departments. The new team sites will have a different site structure (e.g. libraries, lists, metadata) and the onboarding process will include mapping the pre-existing content to the new structure. It is also likely that not all content will be migrated. It is recommended that as departments are engaged, they are encouraged to “clean up” their sites by deleting duplicate and irrelevant content.

It is also recommended that the on-premise SharePoint environment remains available to users, in a read-only state, until departments are ready to sign off on their new sites. Typically, a period of 6-8 months after Go Live. This will help alleviate concerns and lower user anxiety over the migration to O365.

Network Drives

Migrating network drive content presents a larger challenge for CDIC. It has been around longer and contains a much larger volume of data. It is also likely that the data is poorly organized and older content is not familiar to current employees. The project charter should clearly define the scope for network drive migration, so expectations can be agreed upon early. Most organizations decide that 1-2 years of content is a reasonable expectation for the project. Otherwise the project will be at risk to fail or drag on for an undesirable time.

An approach will also have to be agreed upon for the remaining content. Possible options are:

1. Leave it on network drives
2. Move it to a hosted cold storage solution
3. Purchase an analysis tool with the goal of purging a large portion of the content (this would be a separate project)

Regardless of the approach, it is important that users still have access to the content should it be needed. Users can also be instructed to upload content to O365 as they use it (many hands make light work).

For the content that is being migrated to O365, it is recommended that a local folder structure is created that mimics the new team site structures in O365. Users can move content that will be migrated into the correct folders providing the mapping needed to easily migrate using Sharegate.

Volume and Migration Time

The time and effort required to copy content is often underestimated or overlooked causing delays in the project schedule. [REDACTED] ran a test migration at CDIC and received the following results:

1. Attempt at moving info forum site to Office 365:
 - a. 11:15AM start precheck
 - b. Warning and errors regarding term store ID not matching
 - c. Warnings and errors regarding page layouts missing
 - d. Completed 11:26
2. Attempt at moving Images library from 2010 to O365
 - a. Approx. 2k items including file versions
 - b. ~6.25GB in size
 - c. Pre-check started 11:36
 - d. 1 warning, time zone difference from source + destination
 - e. Pre-check completed 11:39
 - f. Actual migration started 11:39
 - g. Completed migration 11:54
 - h. No errors
3. Attempt at moving full HR site
 - a. Pre-check started 12:05
 - b. Warnings-> users and groups not found (expected)
 - c. Errors -> unsupported columns
 - d. Warning -> missing content type
 - e. Pre-check complete 12:11
 - f. Actual migration started 12:12
 - g. Actual migration interrupted due to connection. Possibly firewall reactive rule noticing large data moving out of the system and blocked.
 - h. Could not continue migration but was not near completion for HR site (end 12:36)

Reviewing the results of this test provides the following assumptions and recommendations:

1. 6 GB of data took 18 mins plus time to troubleshoot for approximately 30 mins total.
2. Connection issues could arise when doing batches of large data at a time. It is therefore not recommended to migrate full sites at a time. Individual lists and library content would have higher success.
3. Build site structure, permissions, term sets, and content types prior to migration to avoid errors.

The assumptions and recommendations have been incorporated into the overall roadmap plan.

Third Party Tools

3rd Party Tools for SharePoint on-premise environments will not function in O365 and will need to be replaced. Larger vendors tend to offer their tools for both on-premise and O365 however a direct migration path is often unavailable. They require a new installation and configuration in O365.

The following sections will include details for preparing O365 add-ons for CDIC:

PointFire

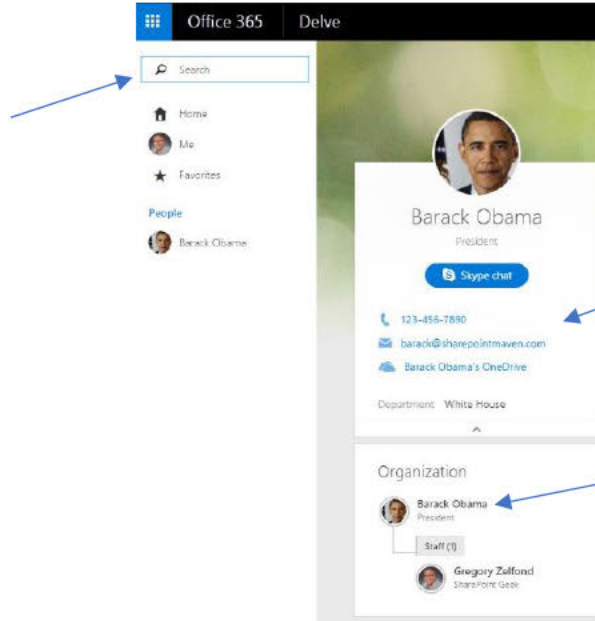
This tool provides support for multilanguage content which CDIC will use for English and French. It allows users to view content in different languages based on their preference. The advantage of this tool is CDIC will no longer need to manage separate sites, lists, or libraries to accommodate different languages. This will change the design for the Intranet and some team sites.

<http://pointfire.ca/>

Amrein Engineering

This tool is used to display a phone book for employees and consultants. It is recommended that CDIC leverages Delve and People Search instead. Based on the recommendations for external access (see External Access section of this document), employees, consultants, and partners will have guest accounts in O365.

People search provides a quick method to find users. Possible matches are displayed as a user starts typing



User contact information appears when viewing their profile.

- Clicking on a phone number will start a Skype call.
- Email will start an Outlook message.

Users can see organization hierarchy with this browser. Clicking on a user will load their profile providing navigation through organization.

Collaboris

This is used to manage important publications to ensure that users have met the mandatory reading of documents such as ethics, annual declaration, code of conduct, etc. Unfortunately, ██████████ was unable to find a viable replacement tool in O365. Some of this functionality could be replaced with Flow however some more discussion would be required.

Change Management

Users are the key to realizing the full potential of your investments. A new tool or technology like Office 365 might meet all your technical requirements, but only when your users adopt and embrace it can your rollout really be a success. If you want to drive Office 365 user adoption to its highest potential, you need an effective change management strategy that:

1. Clearly articulates the behavior changes and expectations
2. Encourages adoption from the top-down
3. Builds a community among users
4. Provides the right help and support at the right times
5. Measures usage and adoption against stated goals

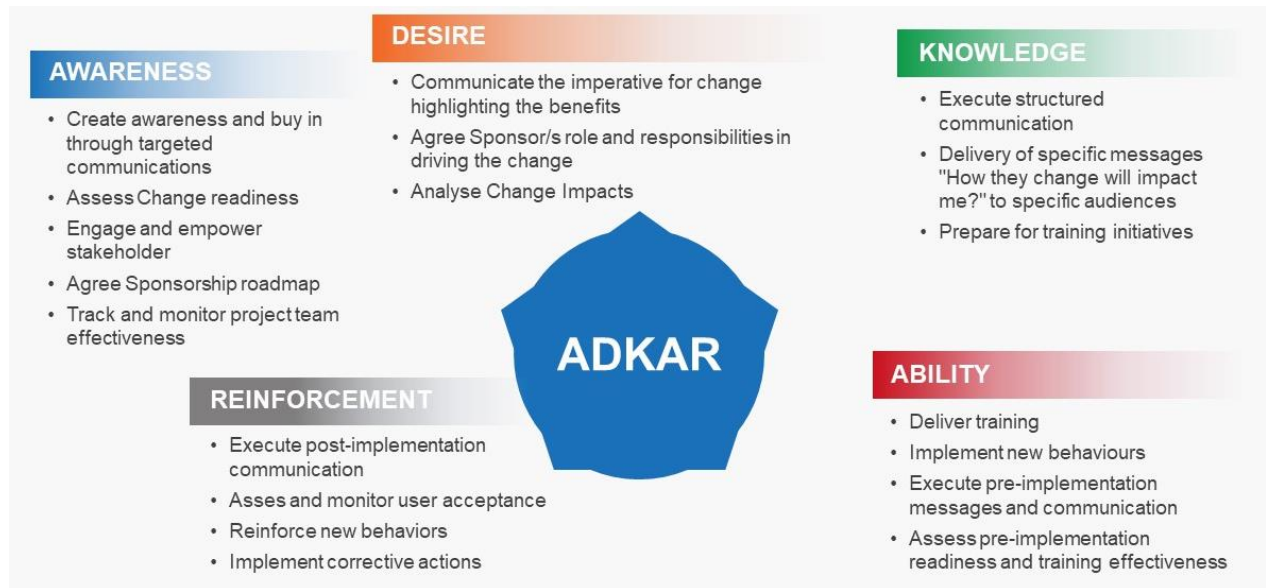
What is Change Management and the ADKAR model?

Change management (CM), from a people perspective, is a systematic approach to dealing with change, both from the perspective of an organization and on the individual level. Research shows that problems with the people dimension of change are the most commonly cited reason for project failures. In a study with 248 companies, effective change management with employees was listed as one of the top-three overall success factors for the project.

Helping managers be effective sponsors of change was considered the most critical success factor overall. Effective management of the people dimension of change requires managing five key goals that form the basis of the ADKAR model.

ADKAR© is based on 10 years of research by Prosci with more than 1600 organizations worldwide. It describes the required five phases that an individual will go through when faced with change in order for that change to be successful.

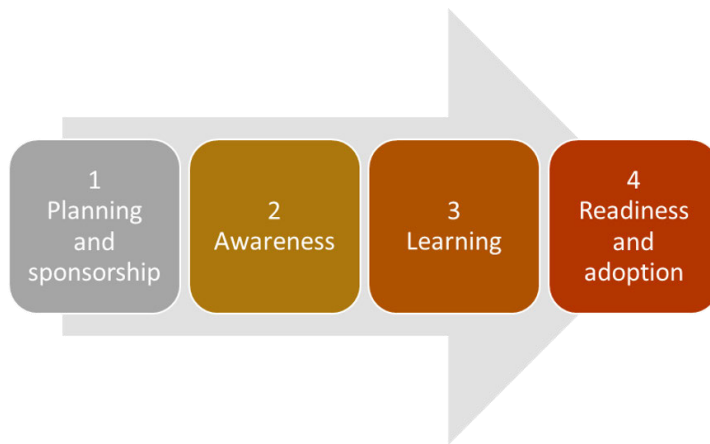
ADKAR© is a foundational tool for understanding “how, why and when” to use different change management tools.



From an individual's perspective, these are the tools you need to get through a change. The ADKAR model helps us understand the individual's needs to be able to get from where they are to where you need them to be.

Four-Phased Approach to Change Management

As recommended by Microsoft, the following four-phased approach is the most effective method of driving user adoption for Office 365 and creating a results-driven Change Management strategy and plan.



1. Planning and Sponsorship

The first phase in this methodology helps change teams prepare and ultimately develop their change management plans. It answers these questions:

1. “How much change management does this project need?”
2. “Who is impacted by this initiative and in what ways?”
3. “Who are the sponsors we need to be involved to make this initiative successful?”

This first phase provides the situational awareness that is critical for creating effective change management plans. The outputs of this phase are:

1. Sponsor Assessment / Structure & Roles
2. Impact Assessment / Audience Analysis
3. Change Management Strategy

2. Awareness

Communications and awareness are critical components to a successful Office 365 deployment. Prior to any communications though, it is important to truly understand the audiences impacted by the technology change. An Audience Analysis and Impact Assessment will measure the degree to which different groups are impacted and then drive out a communications and training strategy that best addresses their needs.

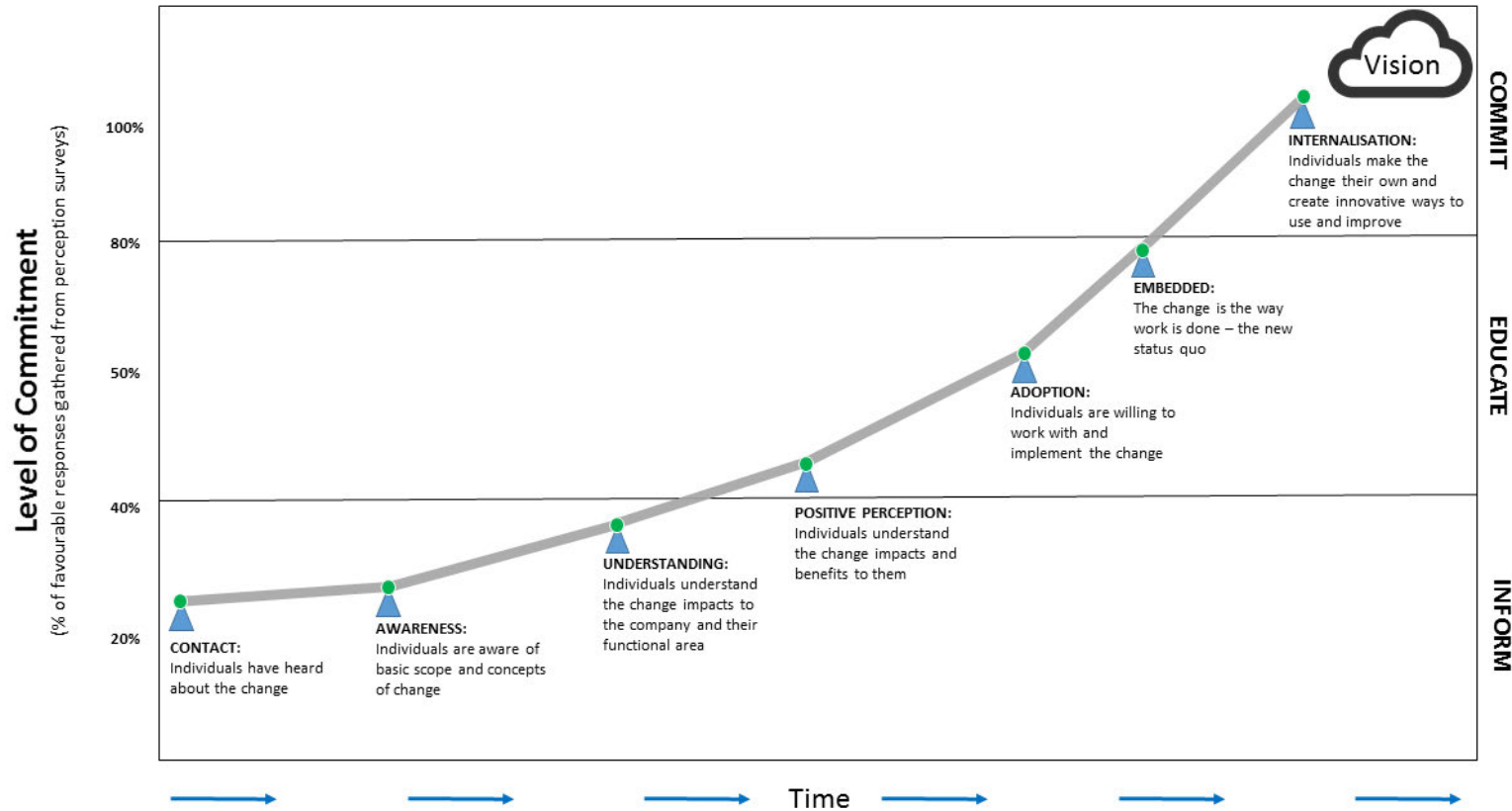
Change Agent “SME” Network

One of the first activities we recommend from an awareness and team engagement perspective is the development of a Change Agent “SME” network. The Change Agent Network includes employees from across the organization with the primary role of sharing information and soliciting participation in communications and employee engagement activities as part of the Office 365 deployment project.

Objectives

- Inform, educate, and engage CDIC staff
- Create a “personalized” communications channel for employees.
- Provide feedback to the project team.
- Help move employees along the Commitment Curve. (see below)
- Reduce employee resistance.
- Create general awareness, understanding and ownership of the Office 365 deployment program.

Commitment Curve



As part of the Awareness phase, the following Change Agent related activities would be addressed:

- Identify Change Agent Members
- Develop Change Agent Information Package (Roles & Responsibilities)
- Communicate Change Agent membership company-wide
- Provide change agents with pre-launch access to site
- Provide change agents with Pre-launch communications, training & support

In addition to a Change Agent Network, we typically recommend the following communication channels/activities when deploying Office 365 within an organization:

- Detailed Communications / Executive Sponsorship Plan
 - Articulates key messages that need to go to various impacted audience.
 - Accounts for who will send the messages and when
 - Helps executives be active and visible sponsors of the change
 - Provides details on when and where we need leaders to be present, what communications they should send, and which peers across the coalition they need to align with to support the change.
- Pre-Launch Awareness Campaigns (email communications, contests, posters, etc.)
 - Email communications (from key sponsors/executives)
 - Contests, i.e. Naming Contests, Team Spotlights, Gallery Tours, Posters)
- Executive WIIFM (What's In It For Me) Tour (see below)
- Intro-Sessions (see below)
- Post-Launch Activities to maintain momentum
 - Site Scavenger Hunts (Users are tasked with finding hidden items on the various SharePoint sites, prizes)
 - FAQs
 - Employees are photographed asking frequently asked questions, published to Intranet
 - Links to Training site, driving traffic to learning resources
 - Lunch and Learns / Power Hours
 - Short sessions, under 1 hour
 - Targeting people who need more specific training on given functionality, e.g. A session dedicated to Delve, One Drive, etc.

Executive "What's In It For Me" (WIIFM) session

These sessions are typically made up of 1x1 meetings with senior management over a set period - to determine their "WIIFM", i.e. what benefit(s) will "win over" this executive. This 1x1 meeting is typically conducted by that executive's assigned Change Agent or the Project Lead with the ultimate goal of determining: What aspects of the new technology (Office 365) will make them truly support this change?

This session includes:

- Initial session with the project team to discuss the following questions:
 - Validate the WIIFM attendees.
 - What are the current pain-points – from an Executive perspective?
 - What do the Executive know so far? In other words - are they aware that Office 365 is coming?
 - Are there any elements of the Office 365 deployment that will require Executive sign off, e.g. decommissioning shared drives, freezing network shares, etc.
- Drafting up presentation material, which could include a slide deck, site demonstration & associated script
- Onsite meetings with the executives (normally 20-30 mins per executive)

Intro Sessions

As part of the communication plan, Intro Sessions are conducted across the organization to all impacted groups – depending on their go-live dates. These sessions involve a presentation (delivered by a Change Agent or Project Team member) to an impacted team - perhaps as part of their weekly team meeting. During this presentation, teams are shown “sneak peeks” of Office 365 and any relevant features / functionality.

3. Learning

In all Office 365 deployments, proper training is one of the critical success factors in an effective rollout.

The main objective of training is to provide all users with the skills and knowledge required to successfully implement and sustain the new business processes and systems technology at go-live and beyond.

Key training activities include:

1. Developing the training plan after assessing training needs;
2. Designing training content and appropriate delivery methods (e.g. Self-directed, instructor-led, etc.);
3. Developing training materials (where applicable);
4. Preparing for training delivery by conducting train the trainer sessions;
5. Rolling out training to impacted organizations as per the schedule; and
6. Supporting end user training needs during the Sustainment phase.

Scope:

Training will be available to all staff, at various levels for a variety of audiences such as Executive personnel, Site Change Agents, Administrators and staff. The scope of this plan will cover all the topics listed in the Training Approach / Listing of Training Modules section of this document and include survey assessments to gauge SharePoint competency pre and post implementation for evaluation purposes.

Different Training Approaches:

Self-Directed

With a participant population of this size (300-400 users), we recommend that training for this Office 365 deployment be “primarily” self-directed, just-in-time and involve a series of succinct learning videos and/or quick reference guides - rather than the traditional instructor-led, classroom training delivery method. This can be accomplished with subscriptions to partner organizations (Brainstorm, etc.) offering virtual learning online, in addition to custom built e-learning videos where the need arises.

Based on individual training needs, users will be required to complete a “Track” of learning modules in order to be certified and considered “Ready” to utilize the technology.

Instructor-Led

As a secondary option, "Up & Running" Training can be provided in an Instructor-Led / Classroom format for those groups who require it. Sessions are offered throughout a given month and broken out by the various applications contained therein, e.g. Microsoft Word "What's New" sessions, SharePoint 101, etc. For these sessions, supporting courseware and learning aids would be required, either custom-made or bought off-the-shelf.

Listing of Suggested Training Modules:

1. Prerequisite: Introduction to Office 365 Training
 - Audience: All
 - Format: Self-directed, online videos (5 minutes or less)
 - Topics: Core Foundational Skills focusing on the basics of using Office 365, which could include:
 - Office 365 Overview
 - Connecting to Office 365
 - Collaborating with Shared Files
 - Using OneDrive
 - Working with the Outlook Web App
 - What's New in Word, Excel and PowerPoint
 - Delve
 - Flow
 - Teams
 - Using Skype for Business
 - Yammer
 - OneNote
 - Using SharePoint

2. "Working Smarter" Scenario Training
 - Audience: All
 - Format: Self-directed, online videos (5 minutes or less) and/or "How do I..." quick reference cards
 - Topics: "How do I..." topics" in the context of the "Working Smarter" themes, which would include:
 - Connect Your Organization
 - Meet and collaborate with ease
 - Create impactful content together
 - Work in email, solo or as a group
 - Share sites and content

Training Evaluation Approach:

For each department, a baseline survey to gauge current Office 365 knowledge/competency would be administered prior to their scheduled Office 365 implementation. At a specified time, following a department's Office 365 implementation a second survey would be conducted to measure proficiency - as it compares to the initial baseline assessment. Depending on the results, the Change Agent for that particular department may need to investigate further and potentially deliver/procure additional training.

Office 365 Train-the-Trainer Program

This program involves instructor-led training in a Train-the-trainer format, so that an internal client team member(s) can deliver ongoing sessions to employees.

This session would include:

- Developing training courseware and including detailed trainer notes, scripting the delivery of the session
- Delivering one 2-day session (with additional time as required), onsite in the client training room, for the client trainer(s) who will be delivering the session.

Assumption: Selected participants have training background and some base knowledge of Office 365 or comparable computer skills.

Learning Tools

The following section provides details around the scope of various learning tools that we offer as part of an Office 365 deployment. Scope of each learning tool is determined based on impact assessment and in consultation with client.

Training Site

The development of a training site involves creating a site off the home site (which would already be included in the initial site design), and adding collateral to the site (e.g. FAQs, QRCs, eLearning, etc.).

FAQ (Customized)

We normally recommend a top 10 Frequently Asked Questions (FAQs) collection, customized to the client's environment.

Quick Reference Cards (QRCs)

These tools provide information around the most commonly performed tasks by an Office 365 user. These 1-pagers, easy to hang in employee offices, are colourful, engaging, written in clear, easy to understand English.

Glossary of Terms

This document/page contains a listing of typical Office 365 terminology and acronyms and provides quick access to their definitions.

4. Readiness and Adoption

During this phase, you are encouraged to reflect, improve and learn from errors to be successful during the next phases of deployment.

1. Provide first-level “Help-Desk” support agents with learning materials, training and FAQs
2. Conduct surveys/interviews/focus groups to assess user satisfaction with the rollout and the new technology
3. Use all available tools/methods to measure user adoption, e.g. tool usage, metrics, changes in behaviour, surveys, etc.
4. Develop, share and act upon “Lessons Learned” to drive future success

Governance

Governance is an important part of any O365 rollout. It will ensure that the effort put into designing and building the solution will be sustained after Go Live. A proper governance plan will also include user education (e.g. campaigns and training).

The primary components of a Governance Plan are:

1. Roles and Responsibilities
2. Standards, Procedures and Guidelines
3. Monitoring and Auditing
4. Overall Health Checks and Schedule

One of the key decisions before writing a Governance plan is to determine if CDIC will use a centralized or distributed model.

A **centralized** model means that users and business owners will submit requests to an operations group for changes or new containers. This can include managing permissions, creating new forms, workflows, SharePoint sites, lists, libraries, etc. The advantage to this approach is higher quality and consistency as the centralized group will be intimately familiar with the overall architecture and best practices. It is also easier to educate a small number of employees on governance practices. The drawback is properly resourcing this group, so they do not become a bottleneck to the business.

A **distributed** model means that business teams will manage and control their own changes and new containers. Each team will have 1 or 2 individuals with elevated permissions who receive extra training and education around governance and best practices. Using a distributed model means that CDIC can have a smaller operations group to support the business. Business teams will also be able to quickly implement their changes and be more agile. The primary drawback will be maintaining the overall quality and consistency.

██████████ recommends a mix of the two approaches that is clearly defined in the governance plan. Items such as managing permissions, creating views, and adding metadata can be managed by each business unit while maintaining quality. This would leave more complex items (creating new sites, lists, libraries, forms, workflows) for a centralized team that is better staffed and trained.

Appendix A – Key Decisions

Decision 1: Migration Approach

Option A: Migrate “As Is” (i.e. Lift and Shift)

Impact to Vision	Impact to Project Team	Impact to End User	Estimated Effort
<ul style="list-style-type: none"> ▪ Negative impact to user adoption and overall user experience. The existing sites and structure are not organized as logically as they could be. Metadata and other best practices are not consistently applied. This affects user ability to find content and collaborate. ▪ Difficult to apply retention and disposition policies as content is not properly organized and separated. ▪ Sensitive content is difficult to identify and apply proper controls ▪ Harder to share content with guests as content isn’t properly organized. ▪ Minimal benefits. Gets CDIC off current technology however does not align with other vision objectives or take advantage of O365 offerings such as Teams or OneDrive. 	<ul style="list-style-type: none"> ▪ Quickest path to migration with least effort required. ▪ Will still require effort to resolve migration conflicts such as: <ul style="list-style-type: none"> ○ Custom forms and workflows ○ Custom webparts and pages ○ Setting up PointFire and merging bi-lingual content 	<ul style="list-style-type: none"> ▪ Smallest impact to end user as it represents the least change ▪ Full benefits for users are not realized and user experience is not improved. 	<p>Please note that the following estimate is to compare the two migration approaches and does not include the following:</p> <ul style="list-style-type: none"> ▪ Preparing the tenant (O365 config, setting up user groups, etc.) ▪ Migration of forms ▪ Content Management (English / French Pages, and webparts) <p>That work would be required regardless of the migration approach and will be represented in the Roadmap Total Estimates</p> <ul style="list-style-type: none"> ▪ 100 hours to copy files and resolve any conflicts ▪ 40 hours to resolve migration conflicts ▪ 20 hours of administrator time to facilitate the migration <p>160 hours / 20 days total</p>

Option B: Analyze the current structure and content with intent of creating new logical architecture.

Impact to Vision	Impact to Project Team	Impact to End User	Estimated Effort
<ul style="list-style-type: none"> ▪ Improved navigation, communications, access to documents, etc. providing better user adoption and experience. ▪ Easier to apply retention and disposition policies as content is properly structured and aligns with file plan ▪ Easier to collaborate with guests as content is properly organized along with permissions ▪ Sensitive content is identified and proper controls in place for data loss prevention 	<ul style="list-style-type: none"> ▪ Additional time to identify and understand pre-existing content <ul style="list-style-type: none"> ○ Identify types of content and owner ○ Identify permissions ▪ Additional time to build new structure (sites, libraries, lists, etc.) in O365 ▪ Additional time to cleanup and map content to new structure for migration 	<ul style="list-style-type: none"> ▪ Largest change to end user. New navigation and organization of content. Will require additional training. ▪ Biggest impact to improve user experience and adoption. 	<p>169 sites to migrate + 65 sites unknown = 234 possible sites</p> <ul style="list-style-type: none"> ▪ 40 hours to create schedule, organize meetings and other admin work ▪ 234 hours to identify and understand content (234 sites @ 1 hour average) ▪ 80 hours to create new structure (sites, libraries, site columns, permissions, etc.) ▪ 160 hours to map and migrate content <p style="text-align: right;">514 hours / 65 days total</p>

Decision 2: Network Drive Content

Option A: Continue use of Network Drives and No Migration of Content. Users will have the option of storing content on Network Drives and O365.

Impact to Vision	Impact to Project Team	Impact to End User	Estimated Effort
<ul style="list-style-type: none">▪ Negative impact to user adoption. Users will most likely continue to work as they do today. Some will embrace O365 and others will continue with Network Drives.▪ Retention and Disposition will not be available for content on Network Drives▪ O365 features will not be available for content on Network Drives<ul style="list-style-type: none">○ E-Discovery○ Information Protection○ Data Loss Prevention○ External Sharing○ Collaboration features such as versioning and co-authoring	<ul style="list-style-type: none">▪ No additional effort required to inventory and analyze Network Drive content	<ul style="list-style-type: none">▪ Smallest impact to end users. They will continue to work as they do today	N/A

Option B: Make Network Drives “read-only” and no content migration. Users will not have the option to save new content on Network Drives however will have access to pre-existing content. If users need to edit or work with pre-existing content they will manually upload it to O365 on a “as needed” basis.

Impact to Vision	Impact to Project Team	Impact to End User	Estimated Effort
<ul style="list-style-type: none"> ▪ Will force user adoption as users will have no choice but to store documents in O365. ▪ Retention and Disposition policies can be applied to new content in O365. ▪ O365 features will be available for new content. ▪ Network Drive content will remain as is. A decision will have to be made what to do with this content long term. Recommend moving it to cold storage after an acceptable period (2-3 years). ▪ 	<ul style="list-style-type: none"> ▪ No additional effort required to inventory and analyze Network Drive content 	<ul style="list-style-type: none"> ▪ Largest impact to end users. ▪ Must save new content on O365 and no migration. ▪ Users required to manually upload files to O365 on a “as needed” basis. 	N/A

Option C: Make Network Drives “read-only” and migrate some content. Users will not have the option to save new content on Network Drives however will have access to pre-existing content. Some content will be migrated to O365 (1 or 2 years) to minimize the need for users to manually upload files they want to work with.

Impact to Vision	Impact to Project Team	Impact to End User	Estimated Effort
<ul style="list-style-type: none"> ▪ Will force user adoption as users will have no choice but to store documents in O365. ▪ Retention and Disposition policies can be applied to migrated and new content in O365. ▪ O365 features will be available for migrated and new content. ▪ Some Network Drive content will be migrated to help users transition. A decision will have to be made what to do with remaining Network Drive content long term. Recommend moving it to cold storage after an acceptable period (2-3 years). 	<ul style="list-style-type: none"> ▪ Additional time to identify and understand content currently stored on Network Drives <ul style="list-style-type: none"> ○ Identify types of content and owner ○ Identify permissions ▪ Build additional sites, libraries, lists in O365 to house content ▪ Cleanup and identify content for migration ▪ Execute migration 	<ul style="list-style-type: none"> ▪ Medium impact to end users. ▪ Must save new content to O365 however recent content (1-2 years) will be migrated. ▪ Working with content older than 1-2 years will require manual upload to O365 on a “as needed” basis. 	Unable to provide estimate as network drive inventory and analysis has not been completed. Would require approximately 5-7 days.