THE HONG KONG POLYTECHNIC UNIVERSITY
香港理工大學

COLLEGE OF PROFESSIONAL AND CONTINUING EDUCATION
專業及持續教育學院

User Guide of Staff Personal SharePoint Data Migration

Version 1.1

Date: 30 Sept 2019

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Introduction

The staff Personal SharePoint service (https://cp.cpce-polyu.edu.hk) will be **phased out after 31 Dec 2019**. The service was provisioned on 2007 and let the staff to store or share their personal or working files with colleagues via this online platform.

Why the Personal SharePoint service is required to phase out?
Due to the technical issues and the limitations on the current service, the service will be phased out after 31 Dec 2019 upon the approval by the Information and Education Technology Committee (IETC) on 20 Jun 2019.

In order to let the staff migration the files or contents to another platforms smoothly, this user guide is prepared to assist the staff to perform the migration process.

Point to notice

- Staff should migration all the data and files to a suitable platform or storage location before Dec 2109.
- Validate all the data and files after the migration.
- Check the permission and access right of the data and files one the new platform.
- If it need to migrate to the staff Document Management System, please inform Server Administration team as earliest as you can.

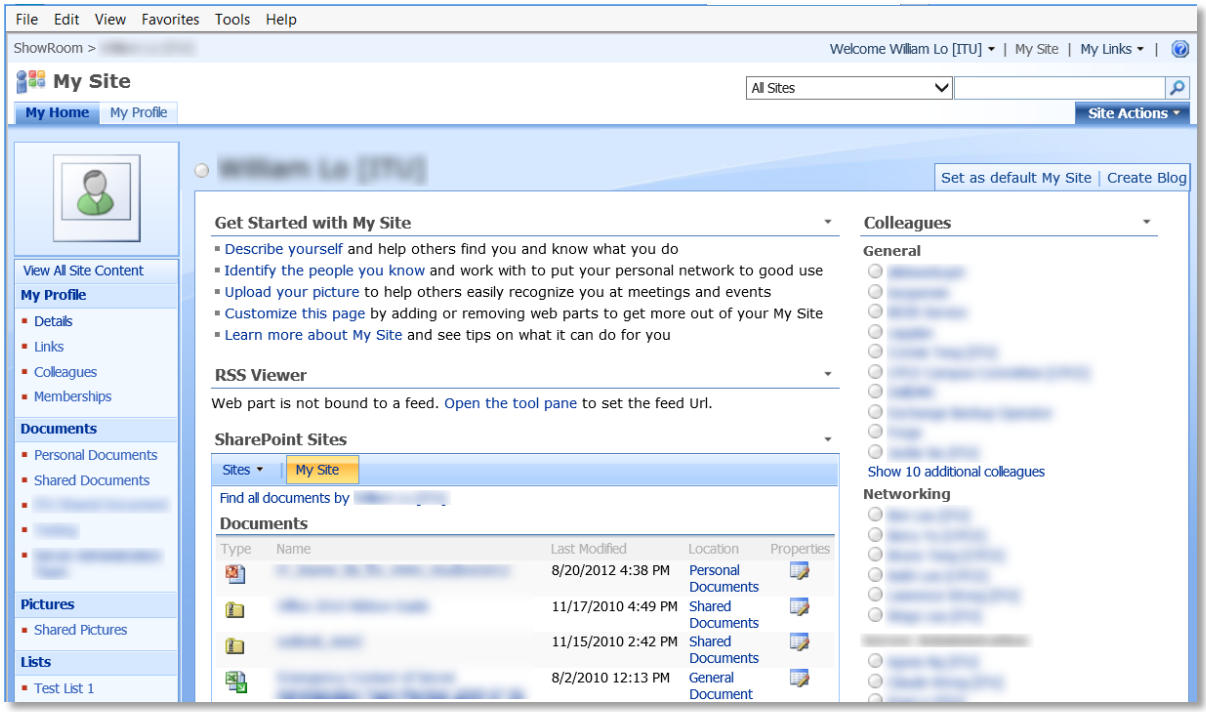
Preparation Before Migration

Review all the content in your site

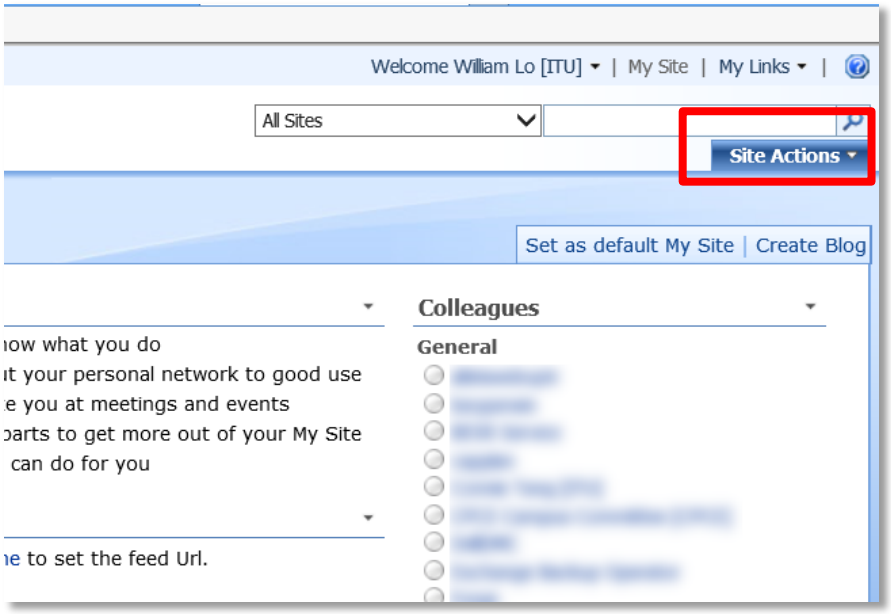
Login the Personal SharePoint (https://cp.cpce-polyu.edu.hk) in the web browser.

Login name: **staff**[*Your user name*]
Password: [same as your email password]





2. Click the **'Site Action'** and select the **'Site Settings'**



In the **Site Settings, record down** the setting in the following areas:



- **People and groups**
  - People and groups are created in your site

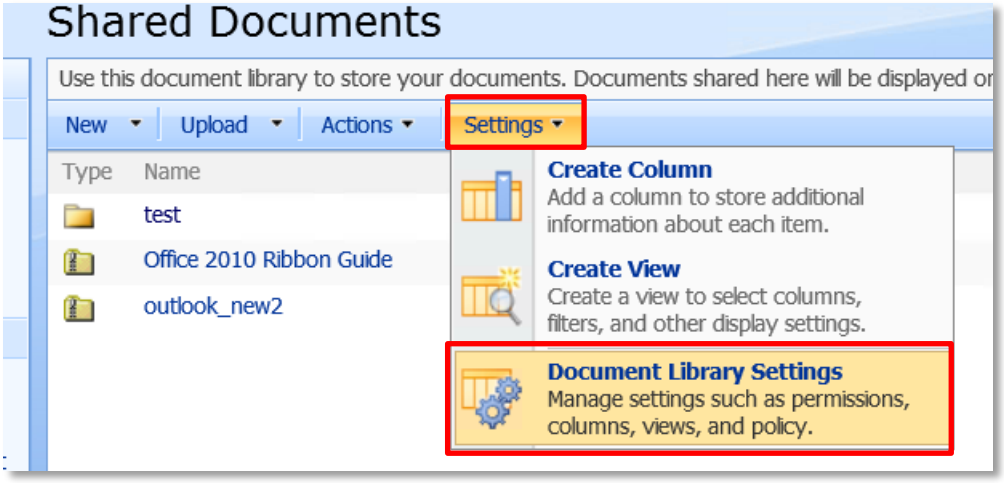
- **Advanced permissions**
  - The permission assigned to the people and groups
- **Site libraries and lists**
  - The libraries and lists were created
- **Sites and workspaces**
  - The subsites were created
- **Workflows**
  - The workflows were created

3. Check the **permission or workflows** setting in all of your **document library or list under 'Documents' and 'Lists'**, **record down** the setting.

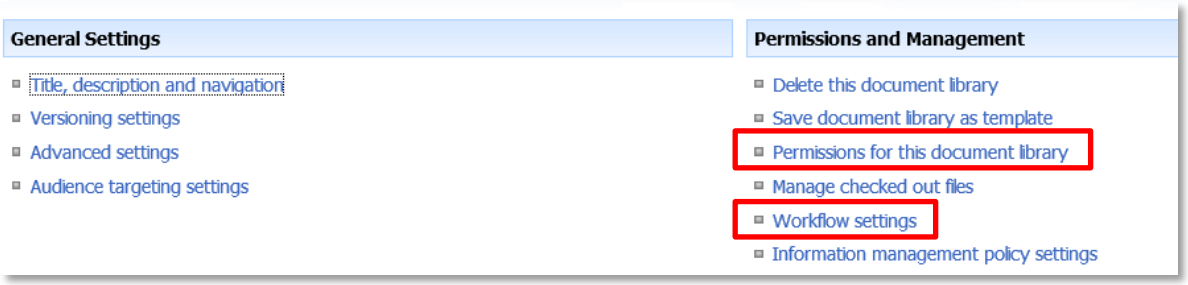
- Click into one of your document library e.g. 'Shared Documents' or list e.g. 'Test List 1'.



- E.g. Clicked into '**Shared Documents**', then click the '**Settings**' and click '**Document Library Settings'.** If it is a list, then click **'List Settings'.**



- Under the '**Permissions and Management**', click into '**Permissions for this document library**' and '**Workflow settings**' to record down the permission and workflow setting.



- Perform the above steps in the list.

Determine and Select the Platform to Migrate the Document and Data

Depending on the usage and purpose, 3 platforms will be recommended.

Platform	Details
Office 365 OneDrive	• Cloud based • Access from anywhere, anytime and any device • Storage of document • Share the file with internal and external users with the specific permission • Multiple users can edit the document concurrently online • OneDrive client can be installed on the user PC for file synchronization • Fully controlled by your own
Office 365 SharePoint Online	• Cloud based • Access from anywhere, anytime and any device • Storage of document and other data in the List format, create a website for information sharing with your team members • Share the document and data with others with the specific permission • Fully controlled by your own
Staff Document Management System (DMS)	• Intranet based and only can be accessed within HHB and WK campus • Storage of document and other data in the List format • Cannot be accessed by external users • Simple e-form and workflow can be created by Nintex • Share the document and data within your units or other units staff • Fully controlled by unit's administrator and permission will be granted to the user by the administrator at the beginning of setup

Determine the Migration Plan

Scenario 1: Simple SharePoint Usage

If you are mainly use the Document Libraries in your Personal SharePoint, and other features to a far lesser extent, like SharePoint calendars and lists, manual copy will be the simple method to perform migration by yourself.

Manual copy of document and other data

- Copying data from your site into targeted location. Setup a network drive to mount the SharePoint Document Library and then drag and drop files & folders from the libraries to the folder in your local PC or the default folder which defined in the O365 OneDrive Client under your PC.

- Similarly you can attach different SharePoint calendars to an Outlook client and then copy content from one into another. For lists, you can export them into Excel, then import the list on the new site from there.

- Export the Lists into Excel file.

- Setup the permission and share the file to let other staff to access.

- Inform the user to access and update the file in the new location.

- Need to consider when using manual copy of document
  - Copying data can be time-consuming
  - Past versions of documents will not be kept
  - Workflows need to be recreated
  - Permissions have to be re-applied
  - No data synchronization from your SharePoint site to your destination platform during migration period

- Migration the document or data to the selected platform

Scenario 2: Complex SharePoint Usage

If there are a lot of complex layers to a site – workflows, app integration or customization, please consult server administration team for further advice.

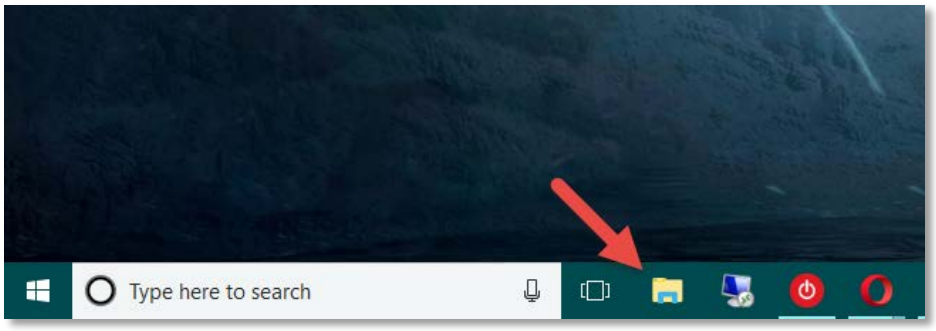
Data Migration Process

1. Mapping SharePoint Document Libraries as Network Drives in Your Office PC

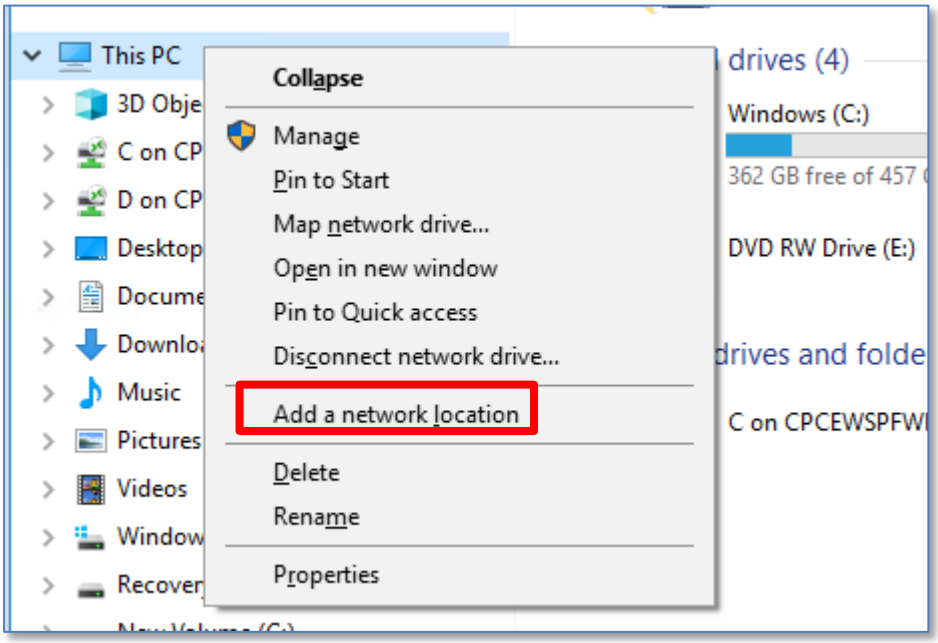
1.1 In Windows 10 and 8.1:

1. Open File Explorer in your PC

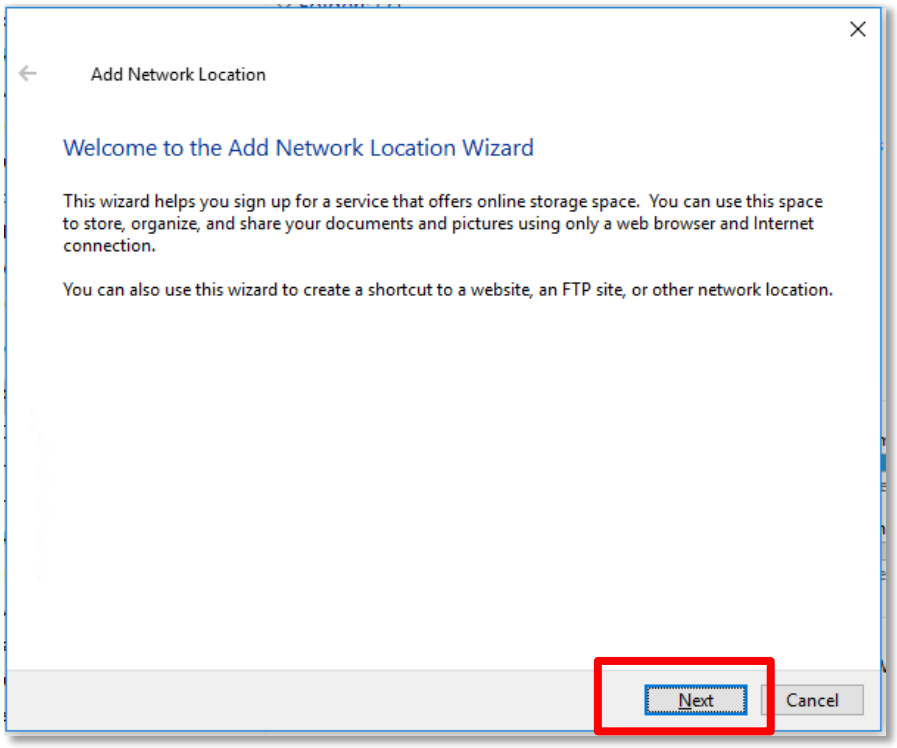
Click on the '**File Explorer'** shortcut icon in the taskbar at the bottom



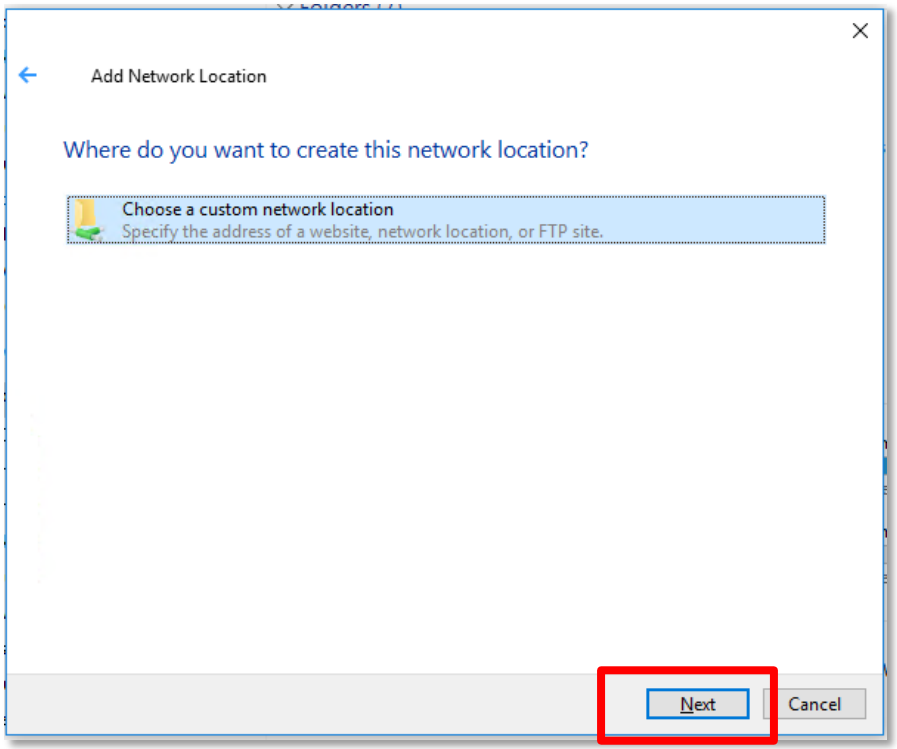
2. Select '**This PC**' from the left pane. Then, right click the '**Add a network location**'.



3. Click '**Next**'



4. Click '**Next**',

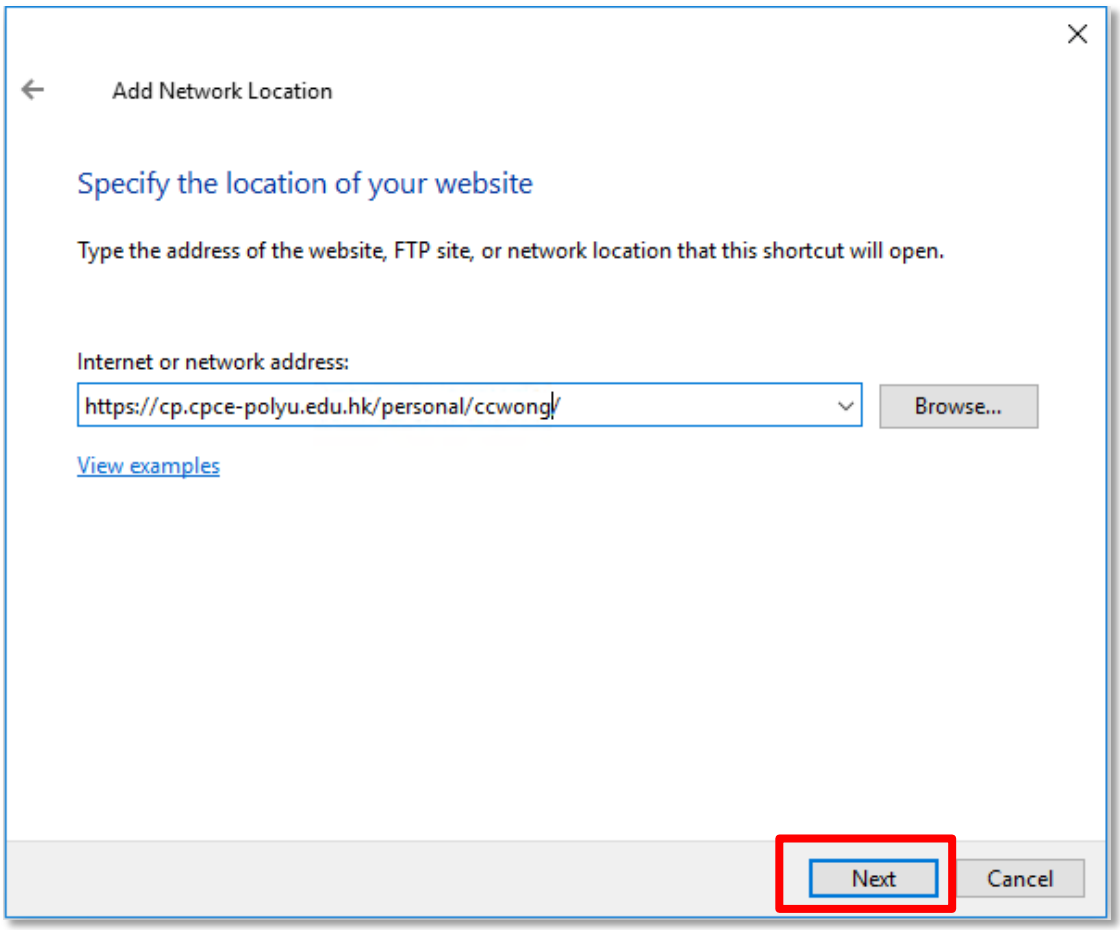


5. Enter your SharePoint site path in the '**Internet or network address**' box.

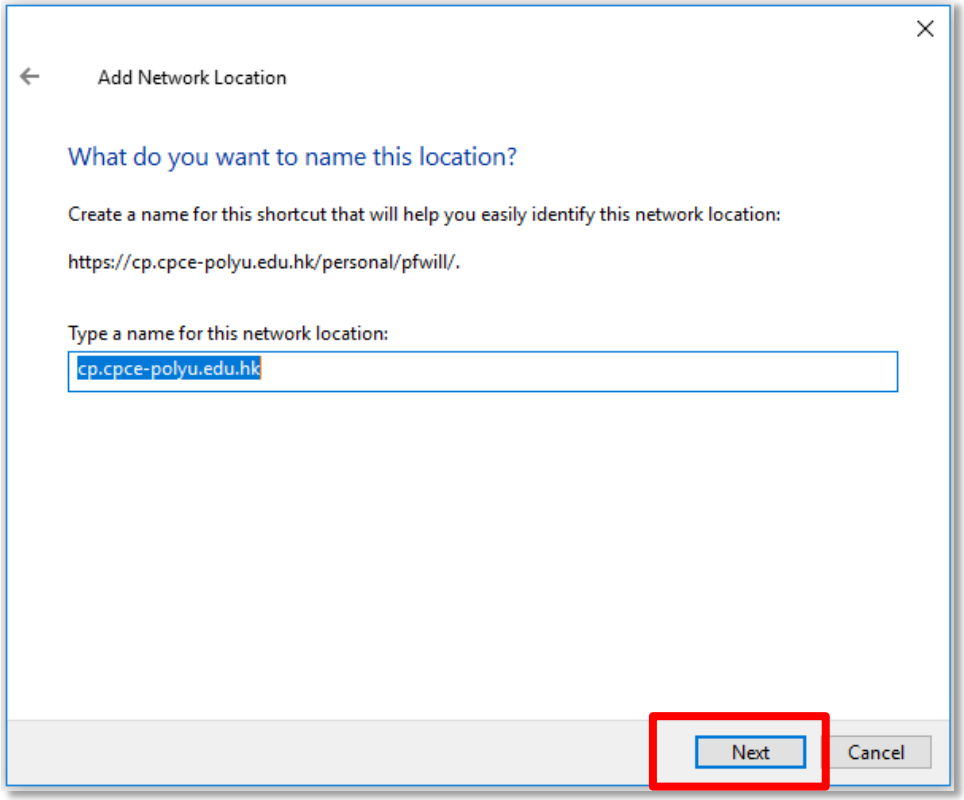
   https://cp.cpce-polyu.edu.hk/personal/***[user name]***/

   if your user name is 'ccwong', replace the [user name] with 'ccwong', the path will be as follows:

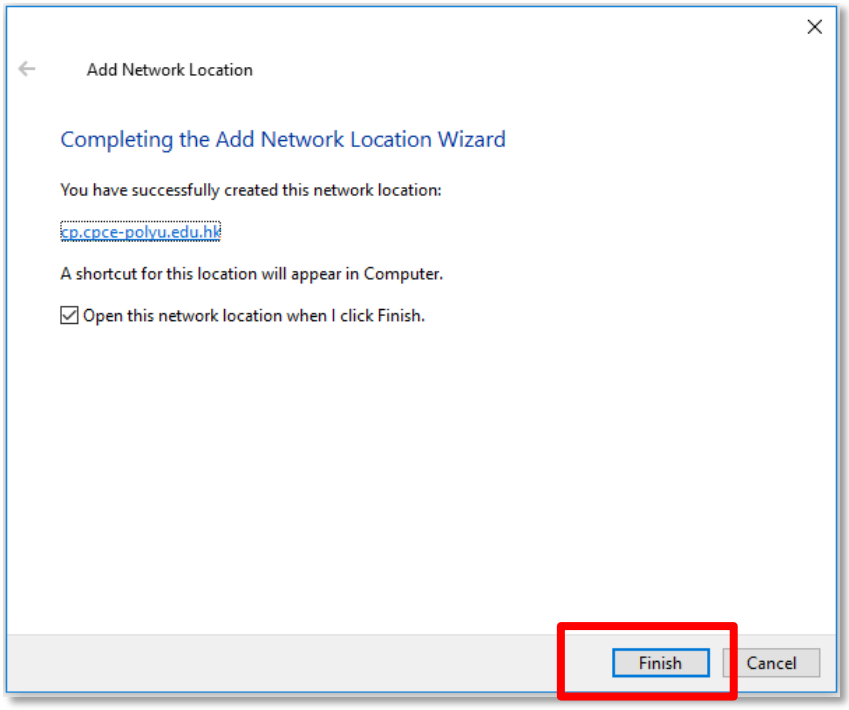
   e.g. https://cp.cpce-polyu.edu.hk/personal/ccwong/



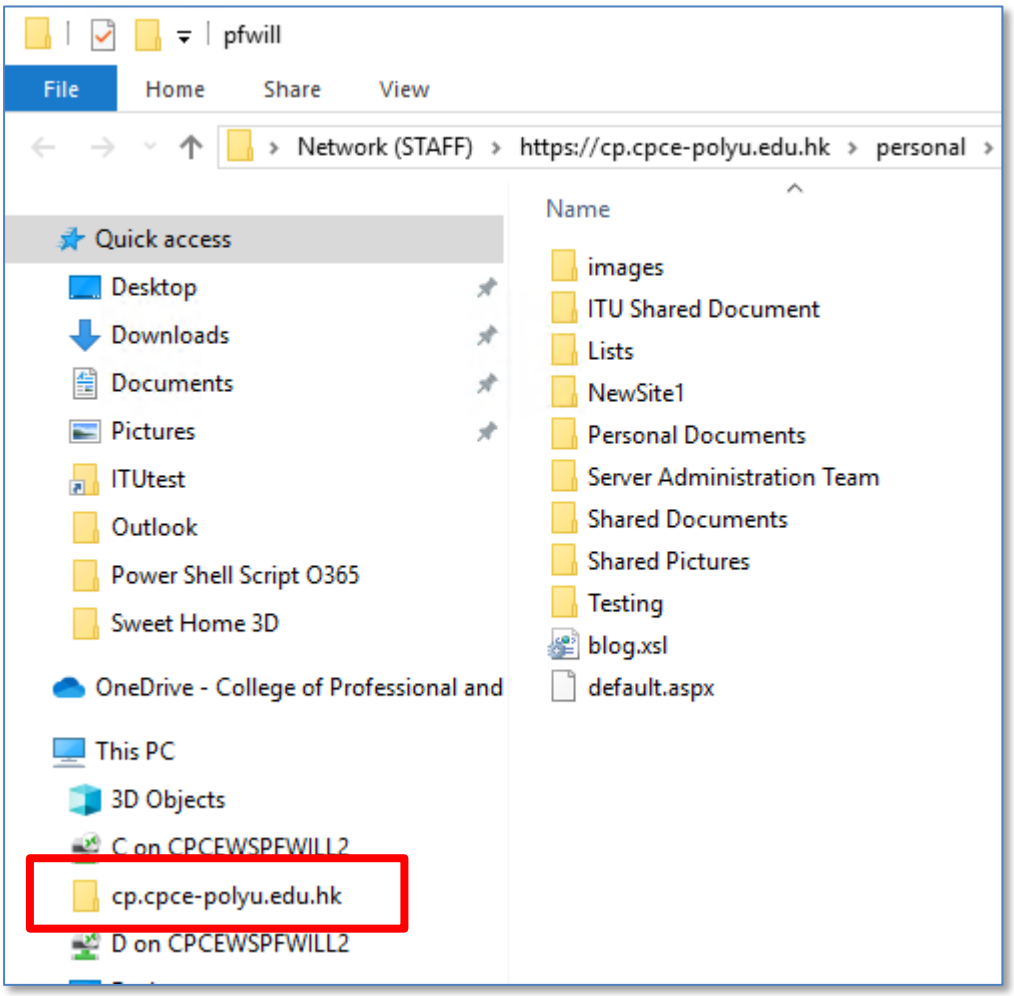
6. Click '**Next**' if you don't need to change the name for this network location.



7. Click '**Finish**'



8. Open the File Explorer, a new network location with the your provided name e.g. 'cp.cpce-polyu.edu.hk' is created. Click on it, the document and list library in your SharePoint site will be displayed in the right pane.

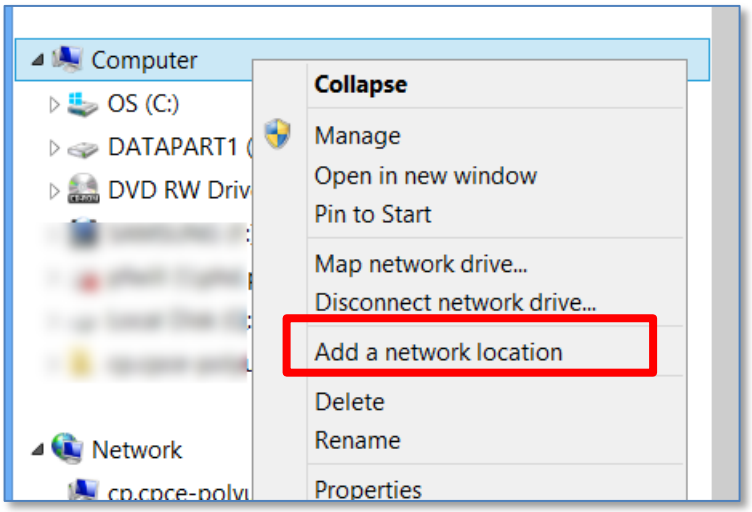


1.2 In Windows 7 or 8:

1. Click on the '**Windows Explorer'** shortcut icon in the taskbar at the bottom



2. Right click '**Computer**' in the left pane and select '**Add a network location**'

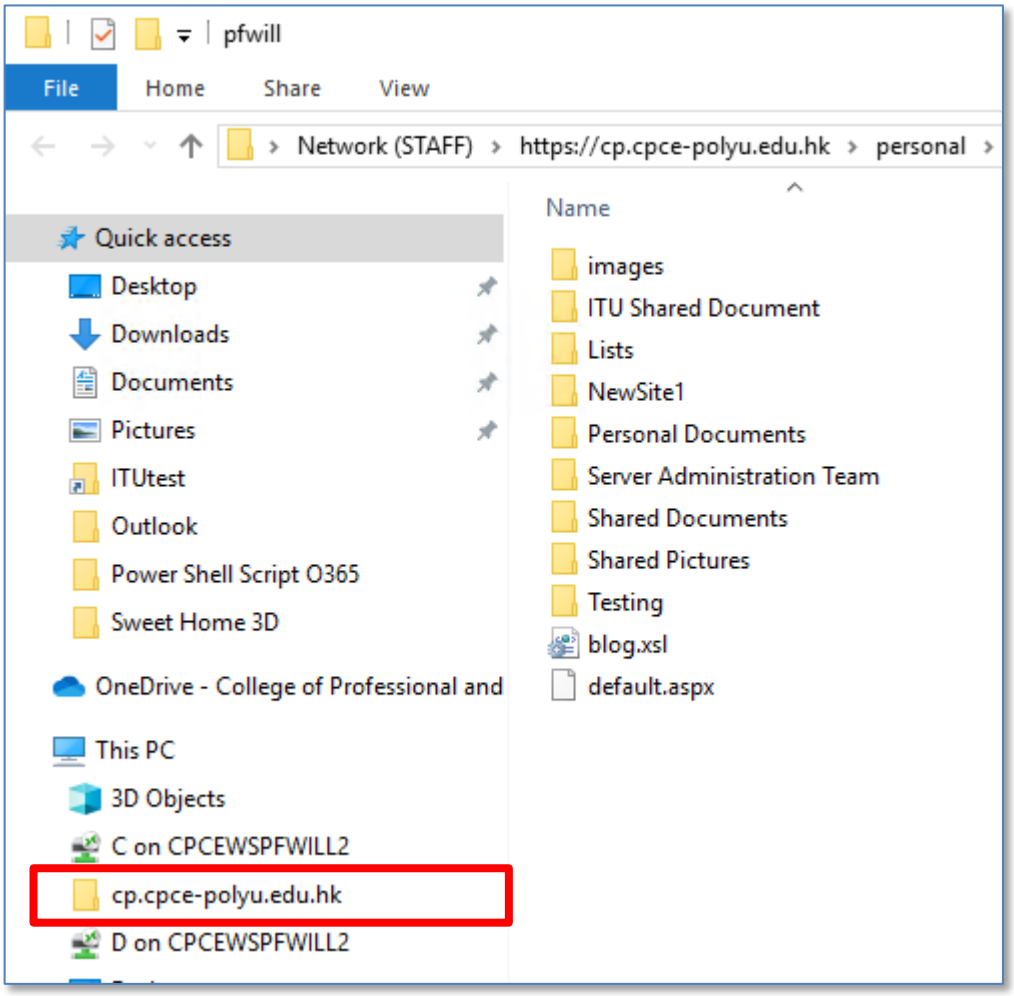


3. Refer to the steps 3 – 8 in the Windows 10 and 8.1 section above to add a network location.

2. Migration the Document Libraries from Personal SharePoint

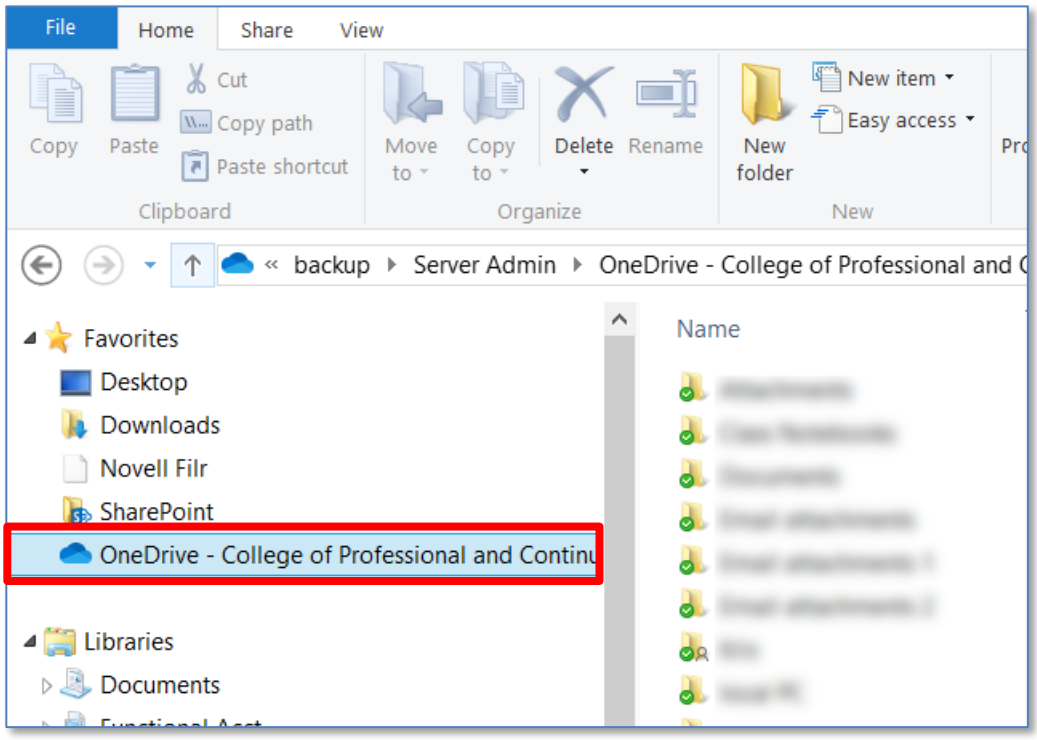
2.1 Moving the Document to Your Office PC

Move the documents from the folders (e.g. Personal Documents, Shared Documents, etc.) under the network connection 'cp.cpce-polyu.edu.hk' in the above section 1.1 or 1.2 to the folder in your local drive.



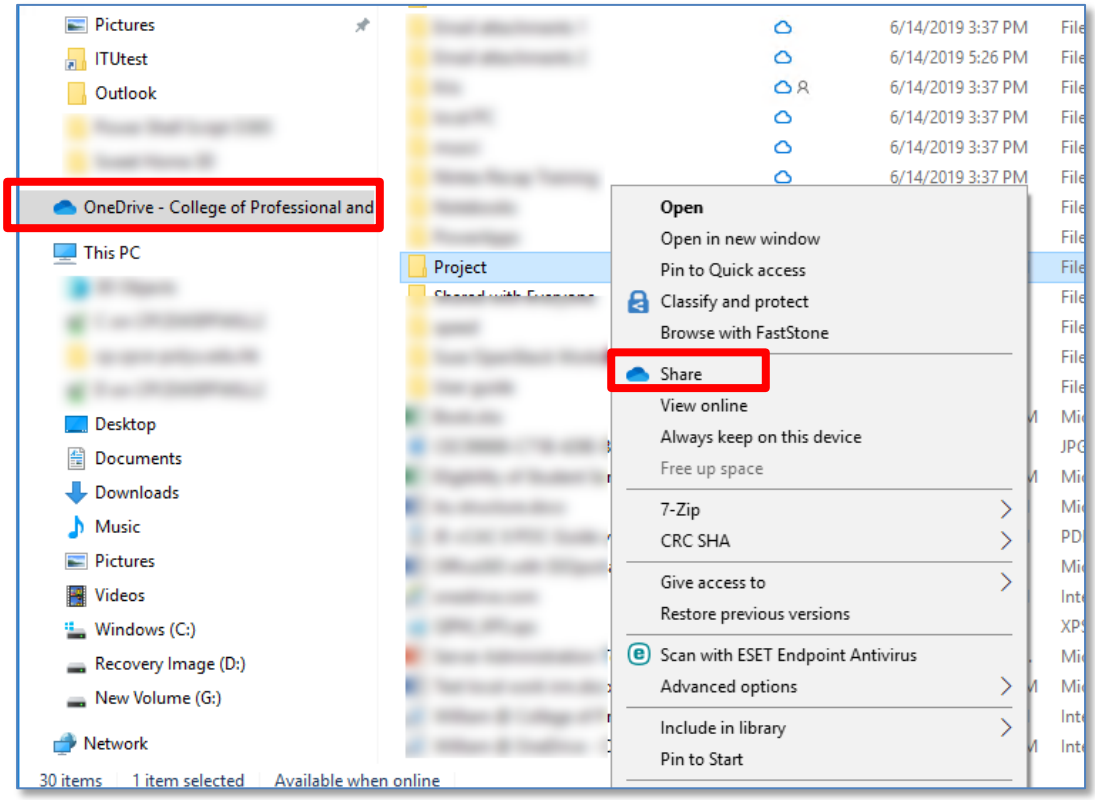
2.2 Migration of the Document to Office 365 OneDrive

- If the OneDrive Client was installed in your office PC, the documents can be moved from your SharePoint folder to the folder in **OneDrive – College of Professional and Continuing Education** in File Explorer.

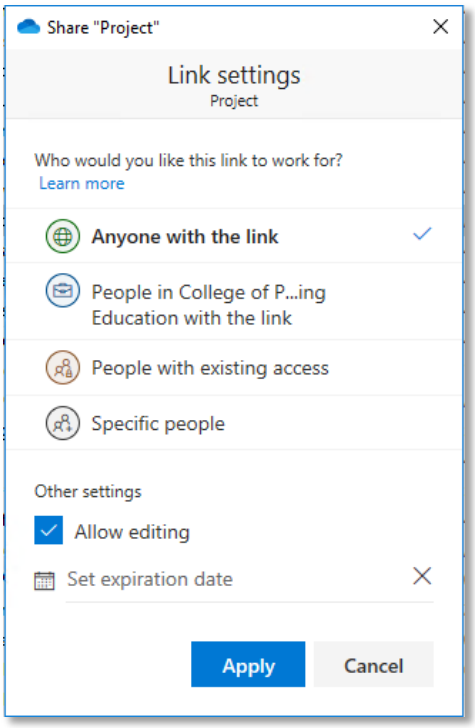


- After moving the file to folder in OneDrive connection in your PC, re-apply the permission on the files or folders if you need to share the file to other colleague to access.

- Right click the selected folder or file which you want to set the share permission and then click the '**Share**'.



- Select and set the appropriate permission on the file or folder.

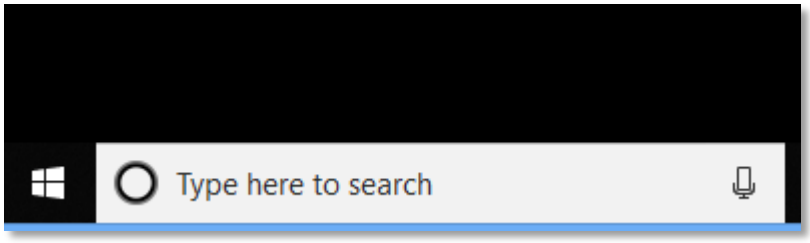


2.2.1 Setup Office OneDrive Client

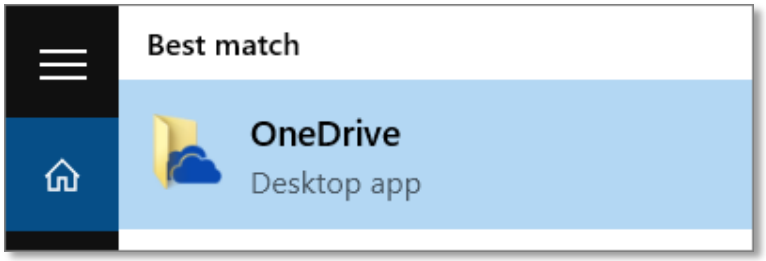
If you don't currently have an account signed in to OneDrive, use these instructions to start OneDrive.

1. Search for 'OneDrive', and then open it:

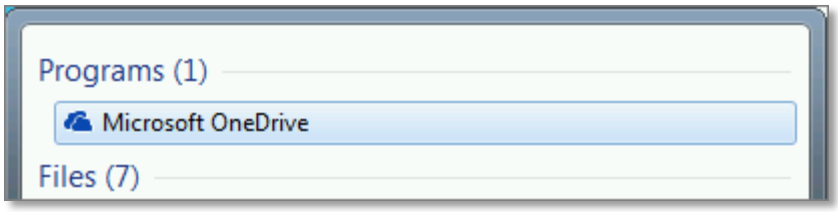
- In Windows 10, search for 'OneDrive' in the left bottom search box.



Select the '**OneDrive'** desktop app in the searching result.



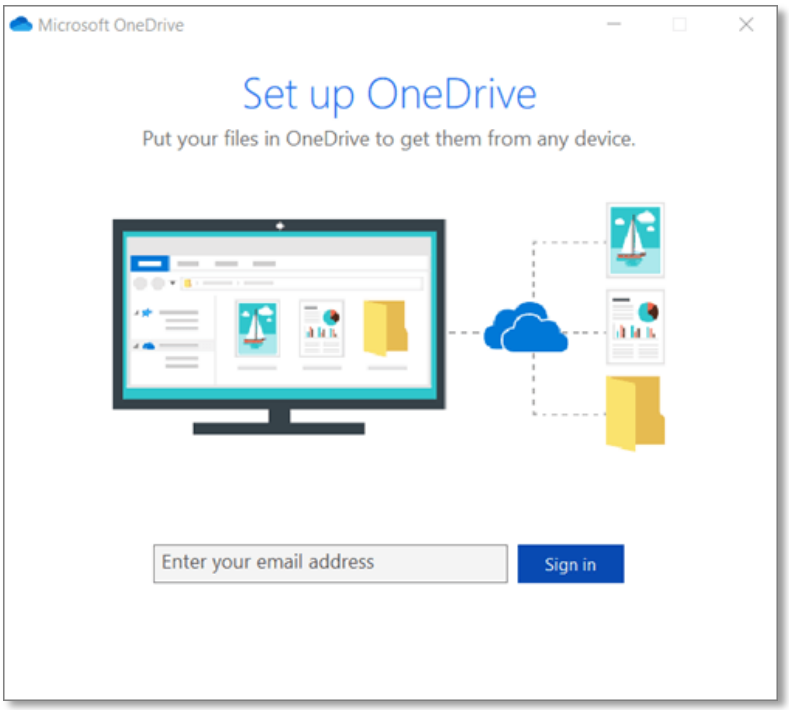
- In Windows 7, under **Programs**, select **Microsoft OneDrive**.



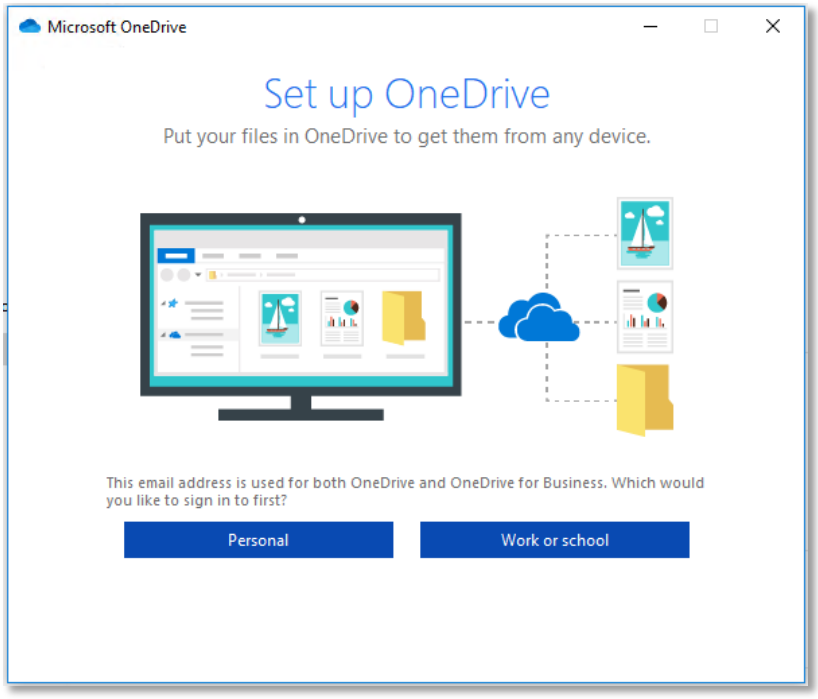
- In Windows 8.1, search for **OneDrive for Business**, then select the **OneDrive for Business** app.

(* make sure the latest version of the OneDrive Client was updated or installed in your PC)

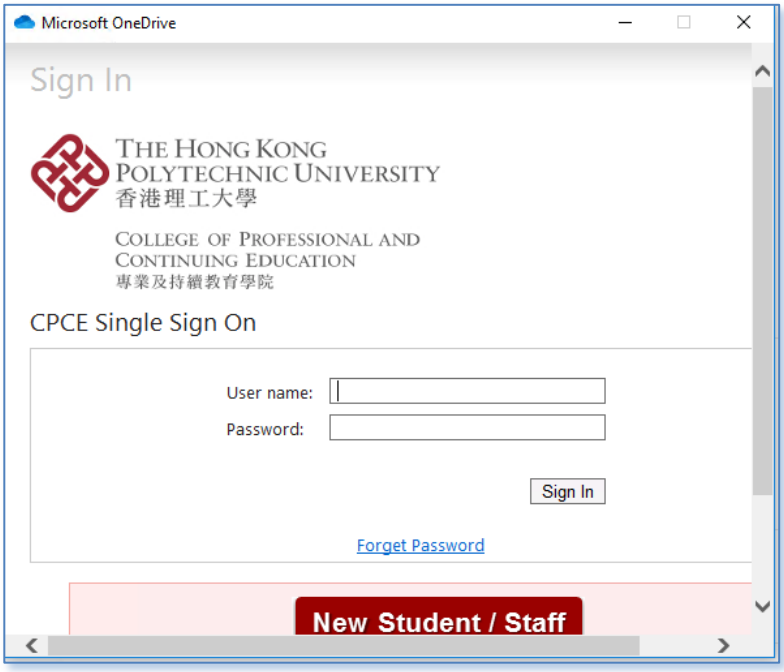
2. When OneDrive Setup starts, enter your **staff email address**, and select **Sign in**.



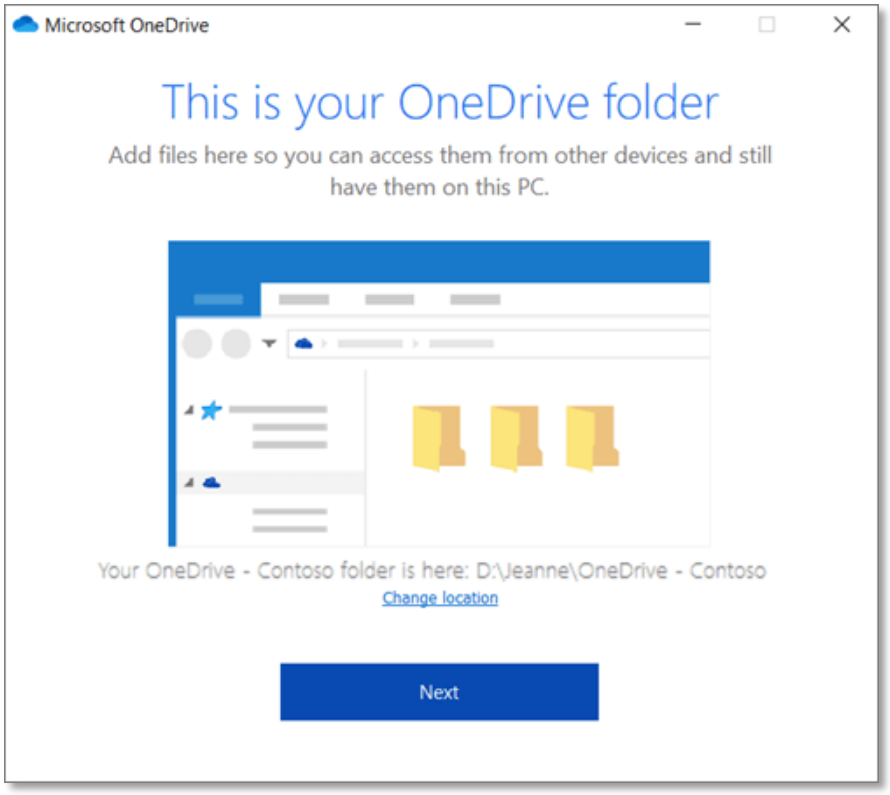
Select '**Work or school**'.



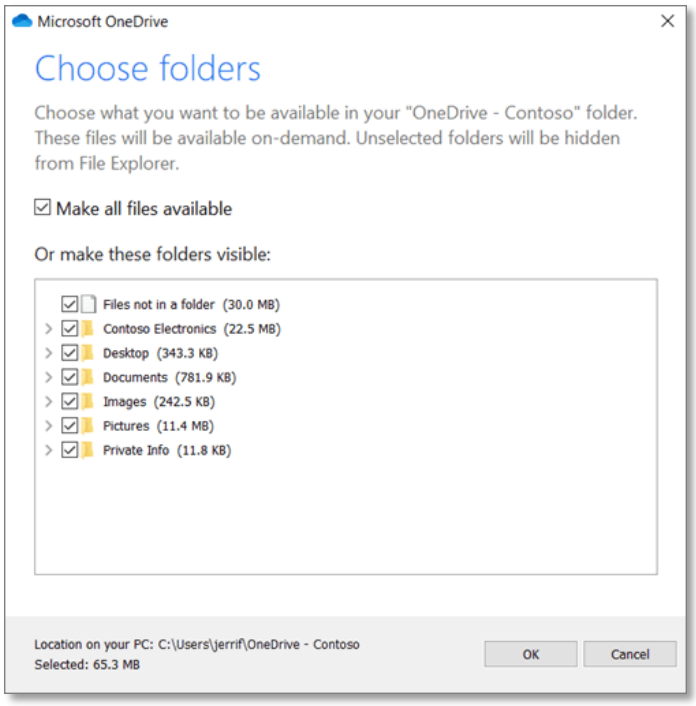
Enter the staff user name and email password.



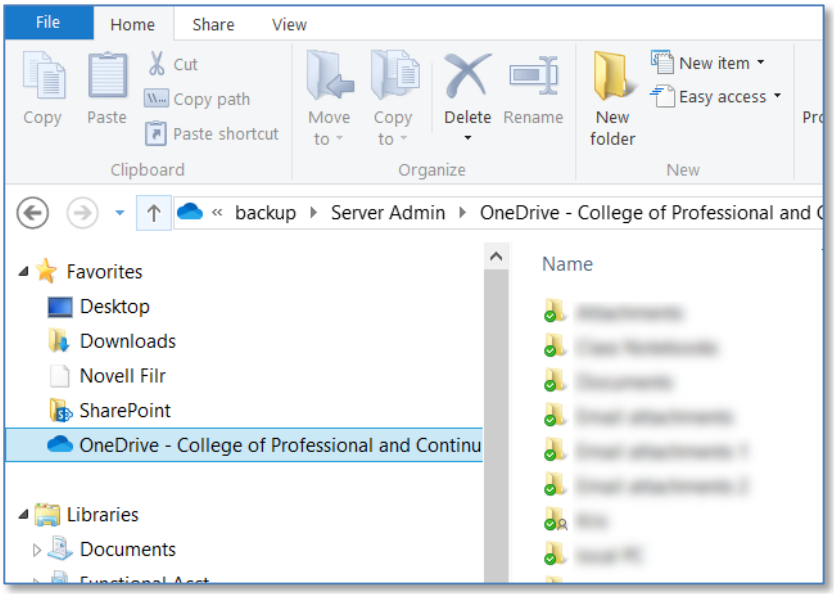
- On the '**This is your OneDrive folder'** screen, select '**Next'** to accept the default folder location for your OneDrive files. If you want to change the folder location, select '**Change location'** - this is the best time to make this change.



- On the '**Choose folders'** screen, choose the folders you want to sync, and select '**Next'**. This helps control the amount of space OneDrive files take on your computer and conserves bandwidth during sync processes. You can change this later in Settings, but this is a good opportunity as well.



- You're all set. Your OneDrive files will appear in File Explorer in the **OneDrive** folder. If you use more than one account, your personal files appear under **OneDrive – Personal** and your work or school files appear under **OneDrive – College of Professional and Continuing Education**.

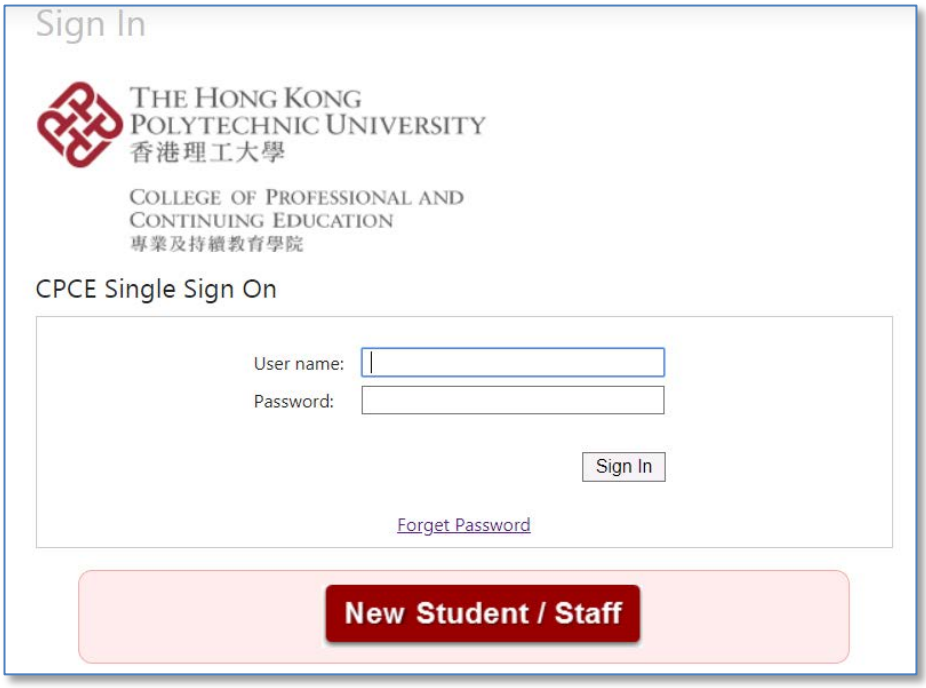


2.3 Migration of Document Libraries to Staff Document Management System (DMS)

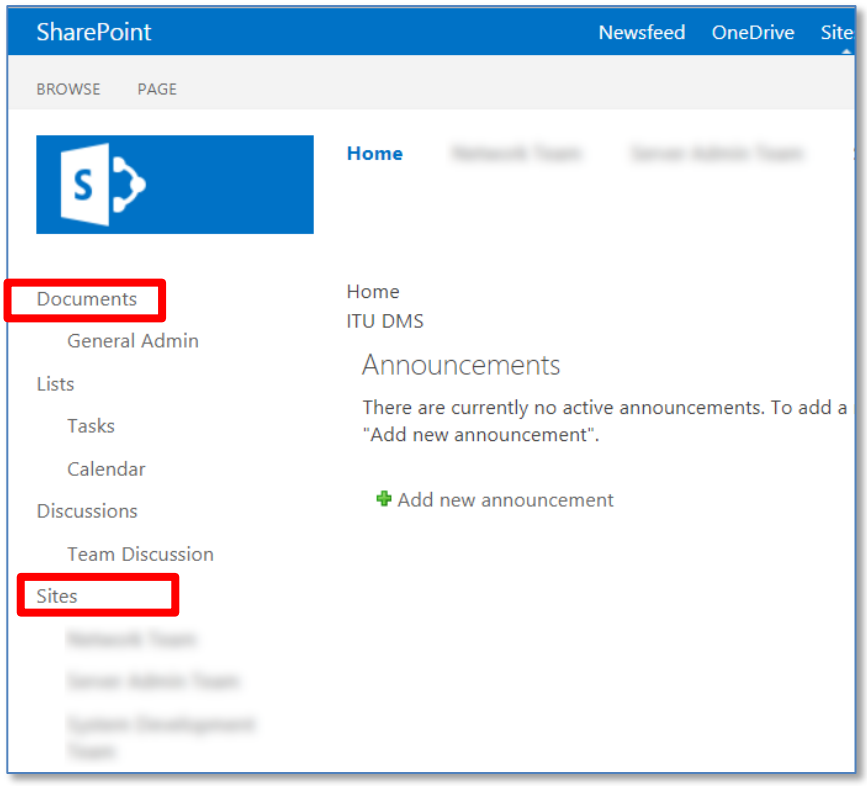
1. Assume your unit's administrator of the DMS had assigned the permission and created a folder or sub-site for you to store the files.

2. Login the DMS at https://dms.cpce-polyu.edu.hk/*[name of unit]*. Replace the [name of unit] with your unit name in the URL link e.g. https://dms.cpce-polyu.edu.hk/hkcc

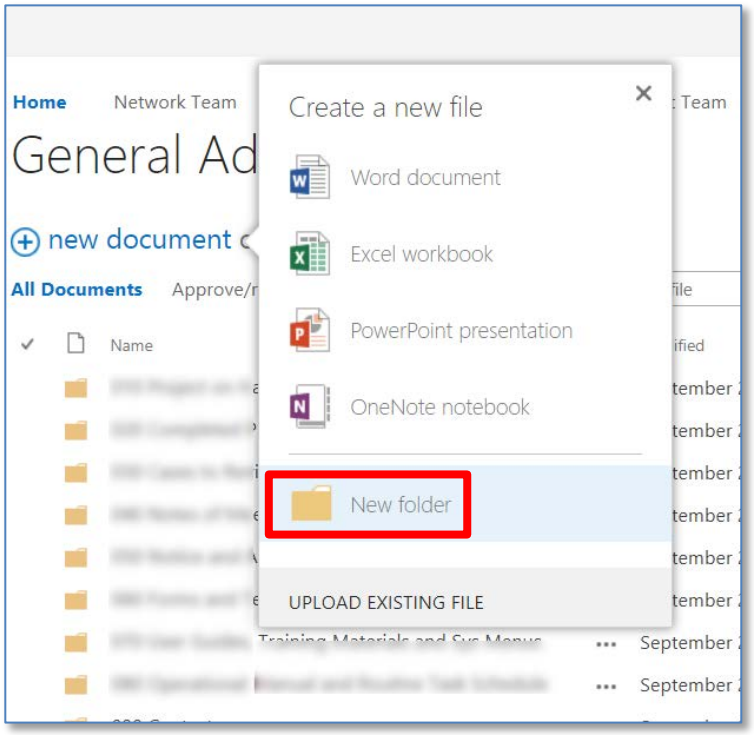
3. Login in with your user name and email password.



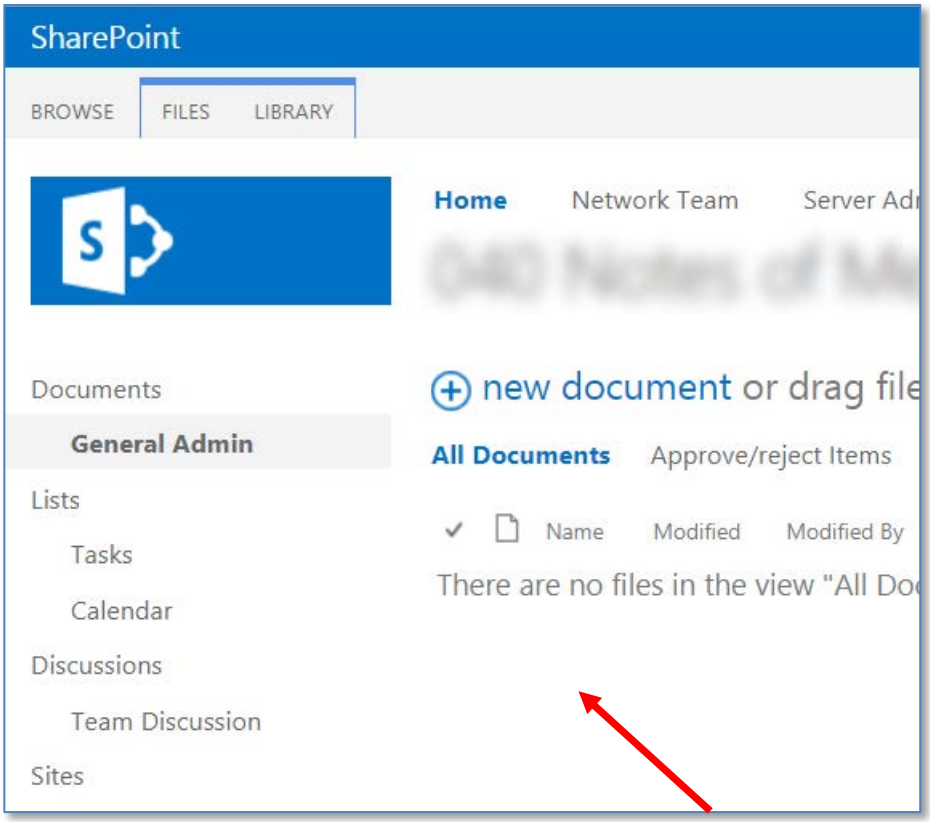
4. Select the Document Libraries or sub-sites by clicking the library under the '**Documents**' or '**Sites**' in the DMS which you want to upload the files.



5. If the folder is not created yet, click the '**+ New Document**' to create it a '**New folder**' and then go into that folder.

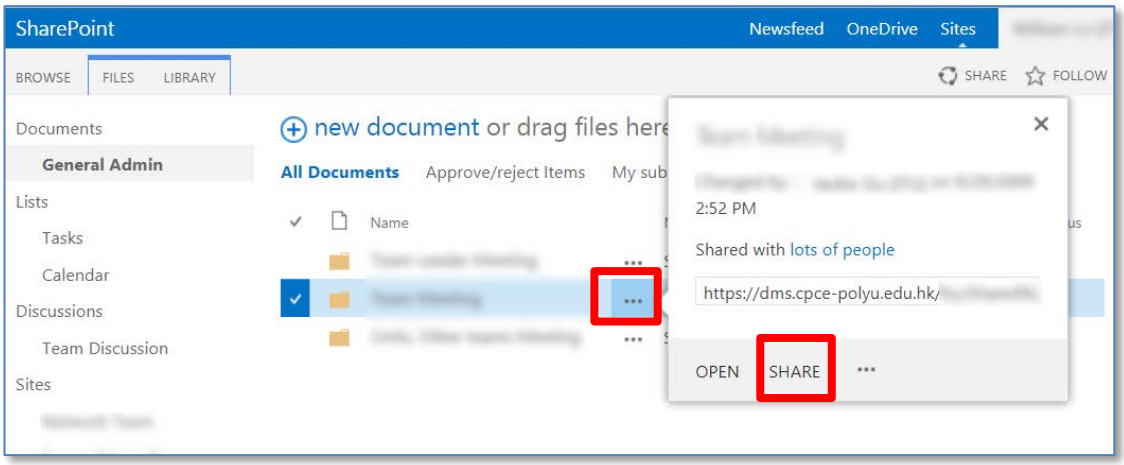


6. Drag and drop the files from your PC's File Explorer to the blank area in the DMS.



Drag and drop the files in the blank area

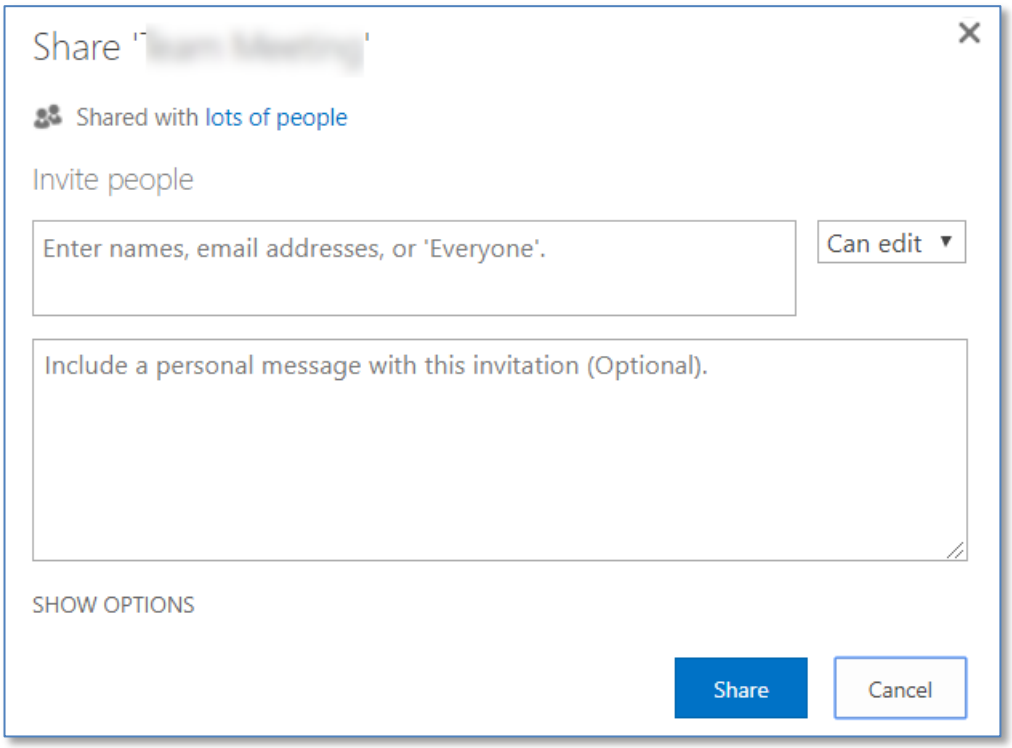
7. Setup the share permission on that folder or file to let other staff to access. Click the '**…**' and '**SHARE**'.



In the Share 'Inventory' dialog box, make sure Invite people is selected, and then type the names of the people or group you want to grant access to in the Enter names or email addresses... box.

Click '**Show Options**' if you want to change the permission level.

Then click '**Share**'.

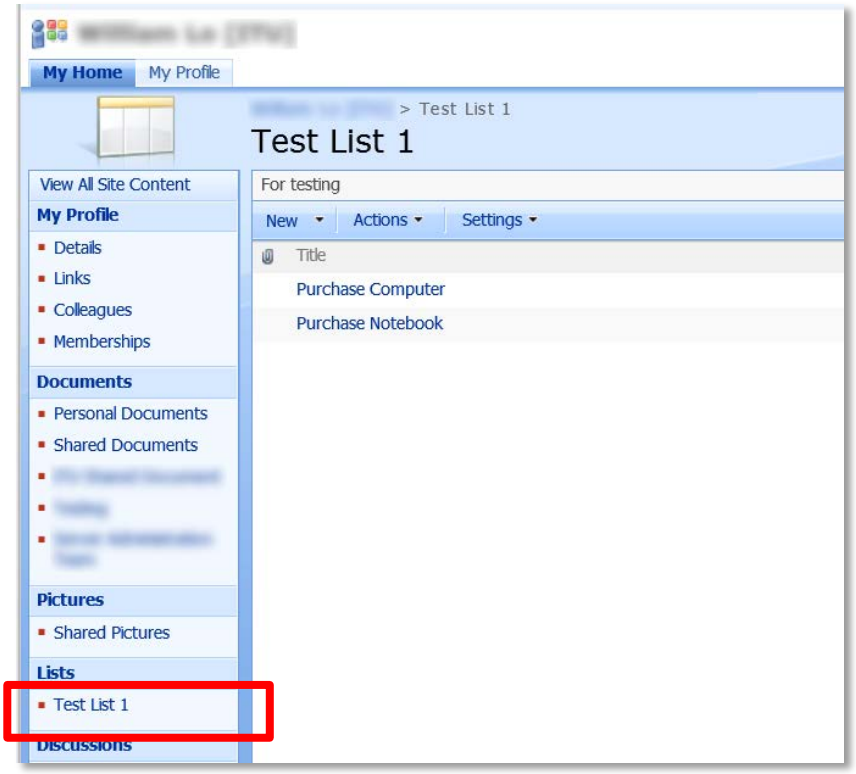


3. Migration of List Libraries from Personal SharePoint

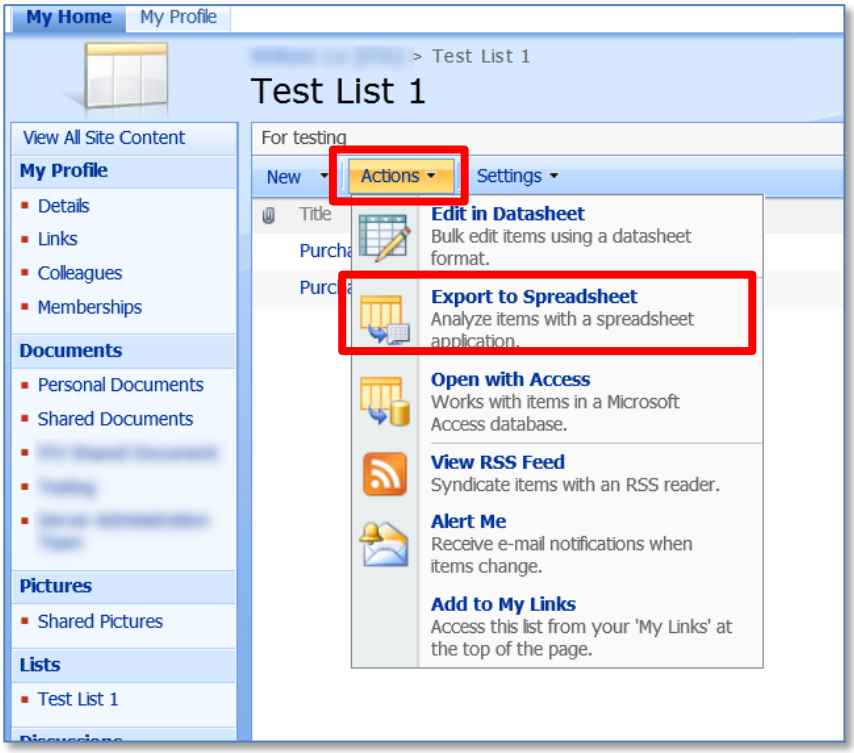
3.1 Moving the List Libraries to Your Local PC

1. Login the Personal SharePoint (https://cp.cpce-polyu.edu.hk).

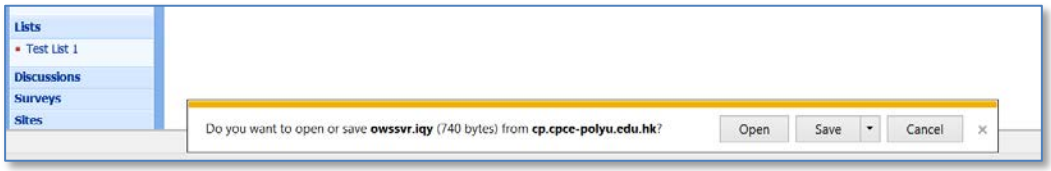
2. Click on the List which you want to export the data, e.g. Test List 1.



3. Click '**Actions**', select '**Export to SpreadSheet**'.



4. Click '**Save**' and then '**Open Folder**' to view browse the downloaded file 'owssvr.iqy'

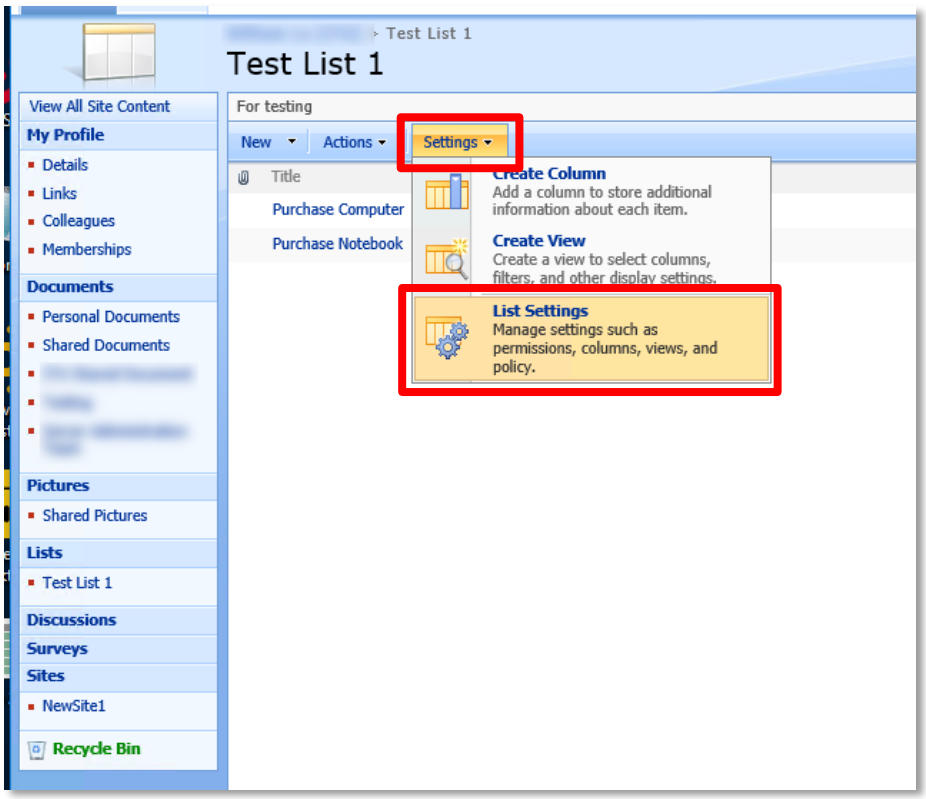


5. Open the 'owssvr.iqy' file and login with the staff user name e.g. 'staff\ccwong' and password.

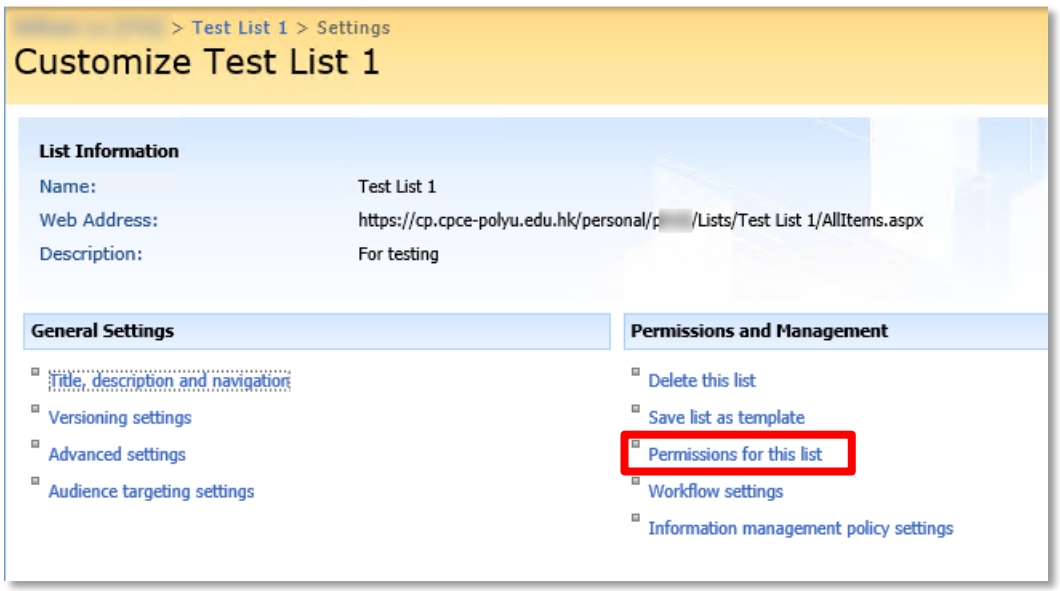
6. Then 'Save As' the file backup to your designed folder in the 'xlsx' format.

7. You could consider to migrate the list to Office 365 SharePoint Online if you need other staff to access it.

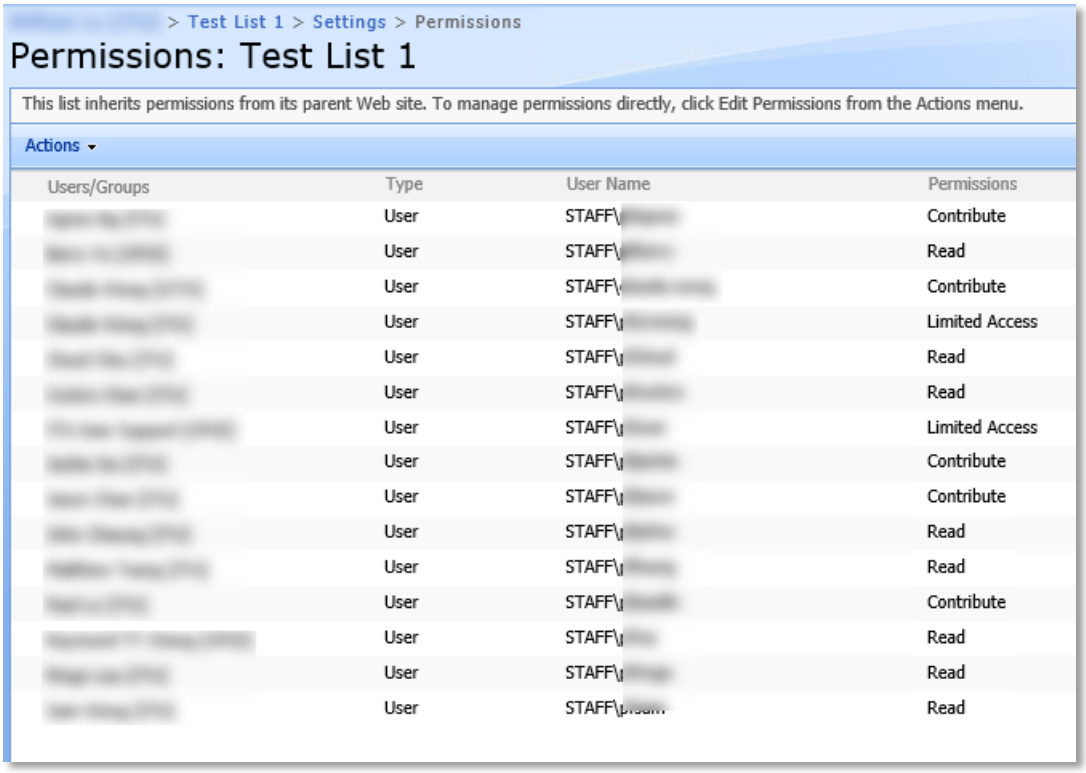
8. Check the permission of the list, click the '**Settings**' and select '**List Settings**' of the list.



9. Click '**Permissions for this list**'.



10. Mark down the user permission of this list.

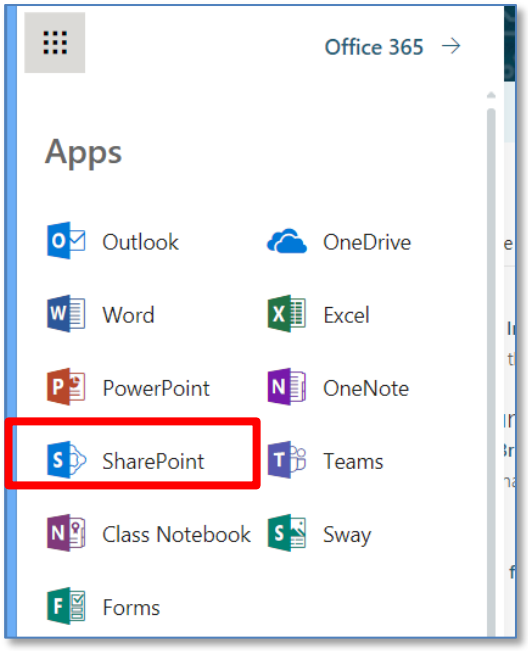


3.2 Migration of the Downloaded List to Office 365 SharePoint Online

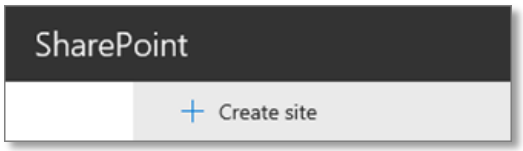
3.2.1 Create a team site on Office 365 SharePoint Online

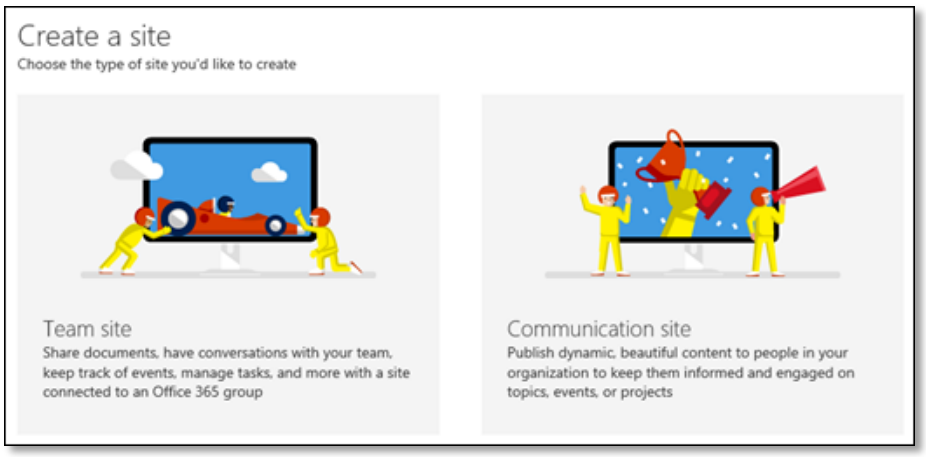
- Sign in Office 365 at https://email.cpce-polyu.edu.hk

- In the top left corner of the page, select the app launcher icon and then select the **SharePoint** tile.

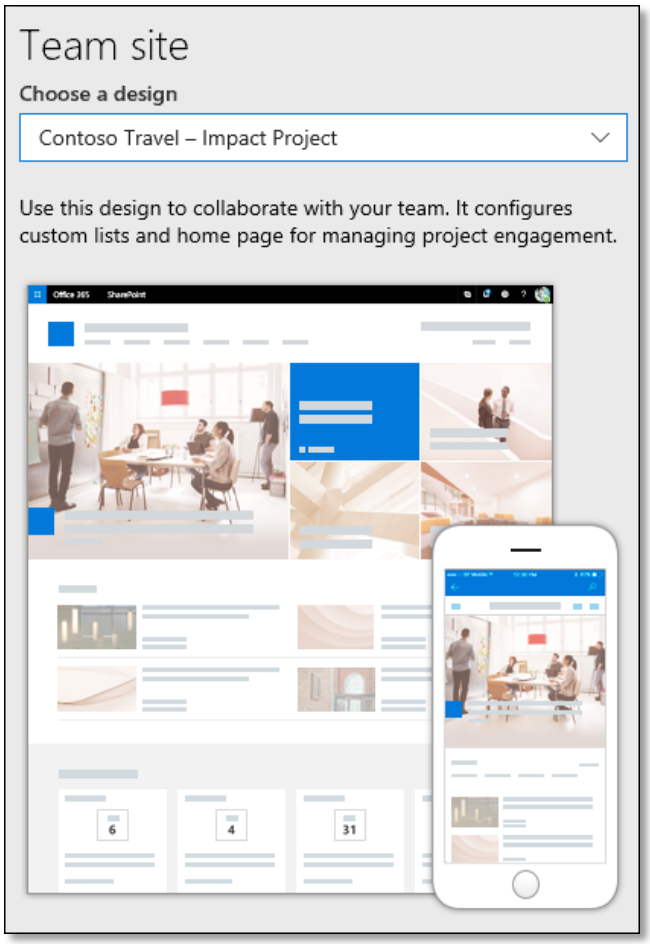


- At the top of the **SharePoint** page, click **+ Create site** and choose the **Team site** option. A site creation wizard will appear on the right-hand side of the screen where you input the information to create a team site.





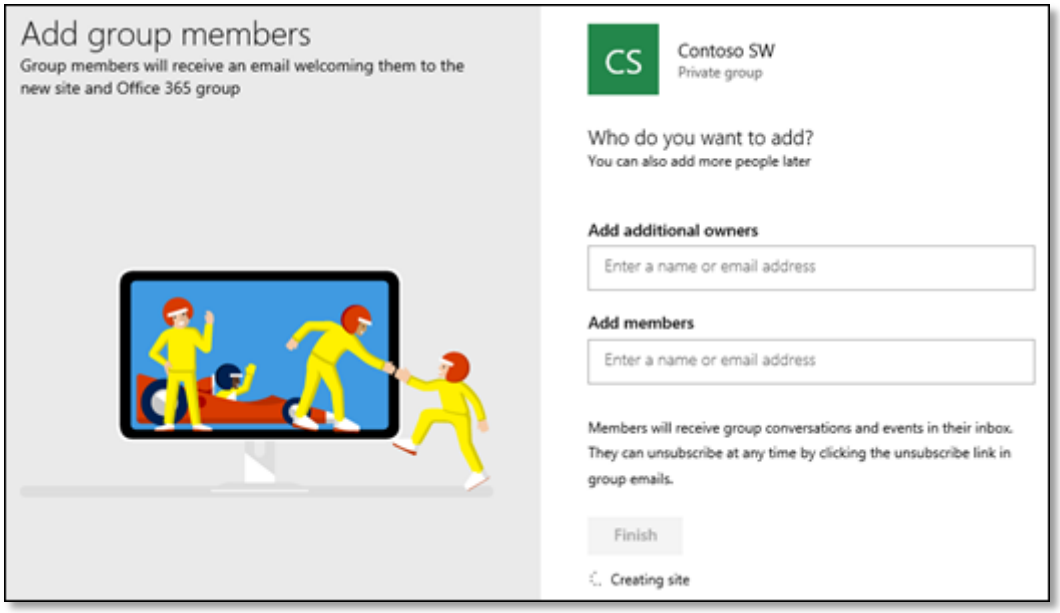
- If enabled by your admin, select the design you want to use for your site.



- Give your new team site a name.
- In the **Privacy settings** section, choose either **Public - anyone in the organization can access this site** or **Private - only members can access this site** to control who has access to your site.

- Select a language for your site.
- In SharePoint Online, add the names or email addresses of anyone else you want to manage the site in the '**Add additional owners'** box.

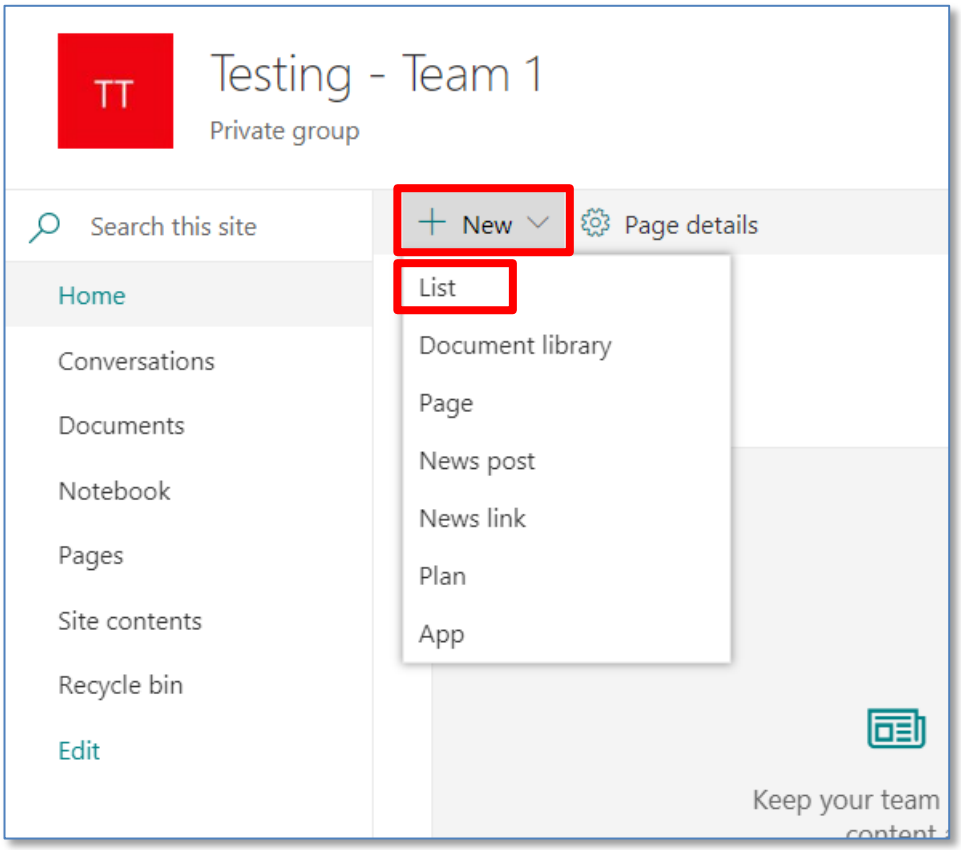
- In the **Add members** box, add the name or email address for everyone you want to be a member of your site and then click **Finish**.



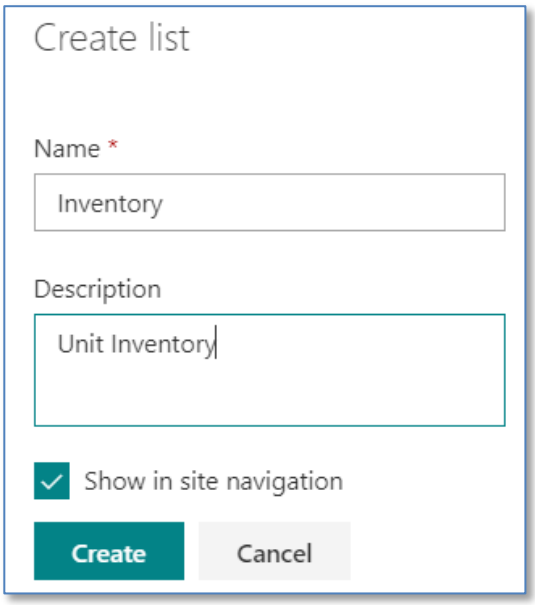
3.2.2 Create a List in Office 365 SharePoint Online in the Team Site

1. Go back into the team site which you just created in the Office 365 SharePoint Online e.g. Testing – Team 1

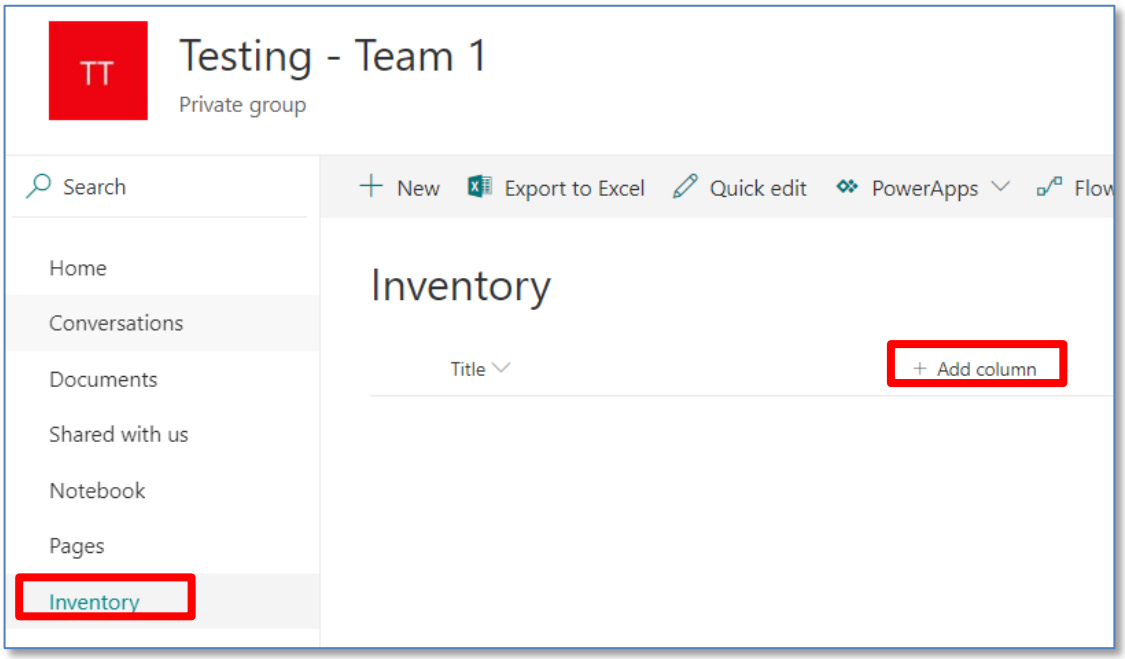
2. Click '**New**', select '**List**' to create a list



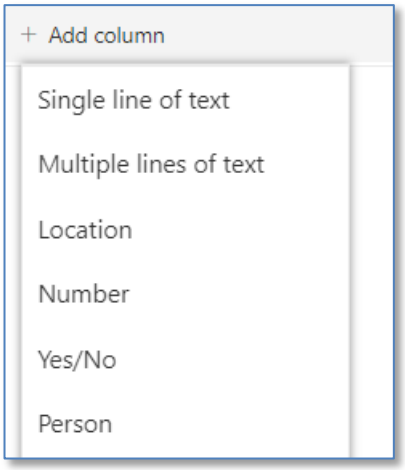
3. Give the '**Name**' and '**Description**' of the list, then click the '**Create**' button.



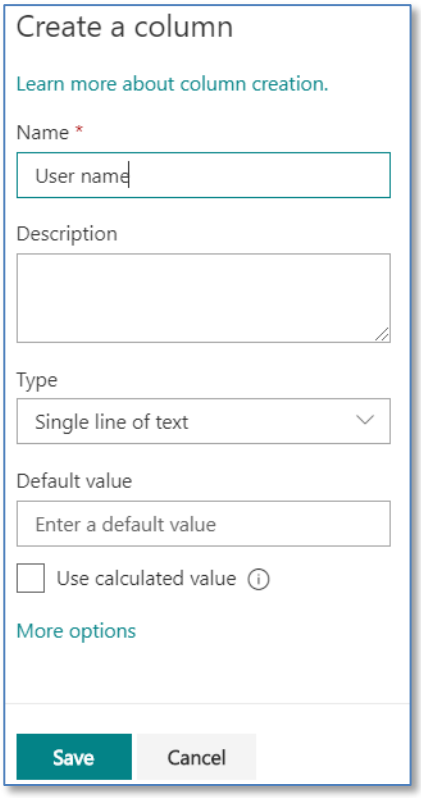
4. Under the newly created list e.g. Inventory, click '**+ Add column**' to add columns to the list with reference to your Excel file which you exported in the form section.



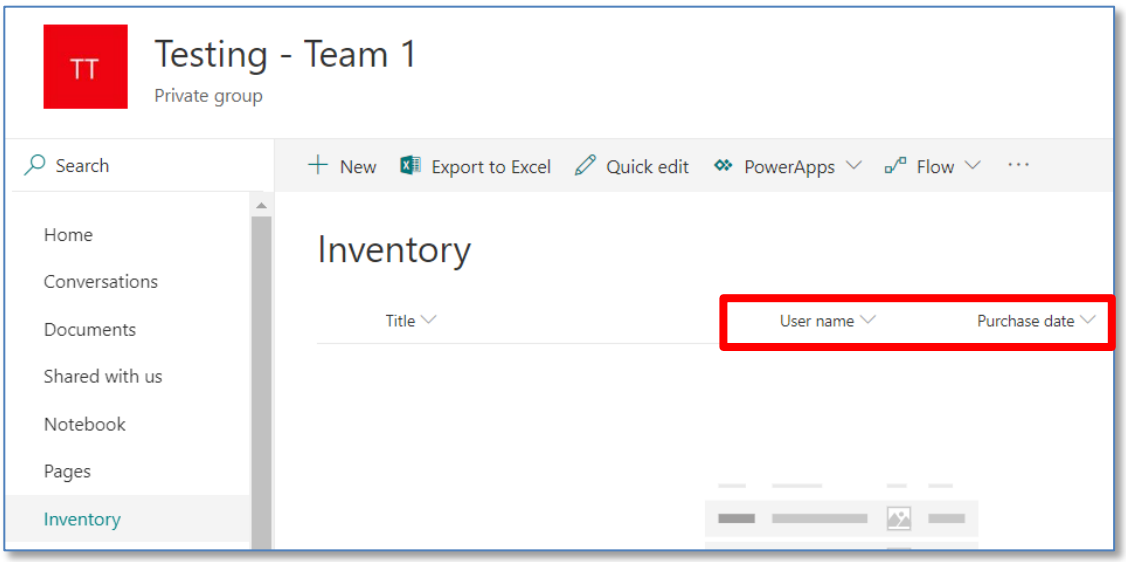
5. Select the type of the column.



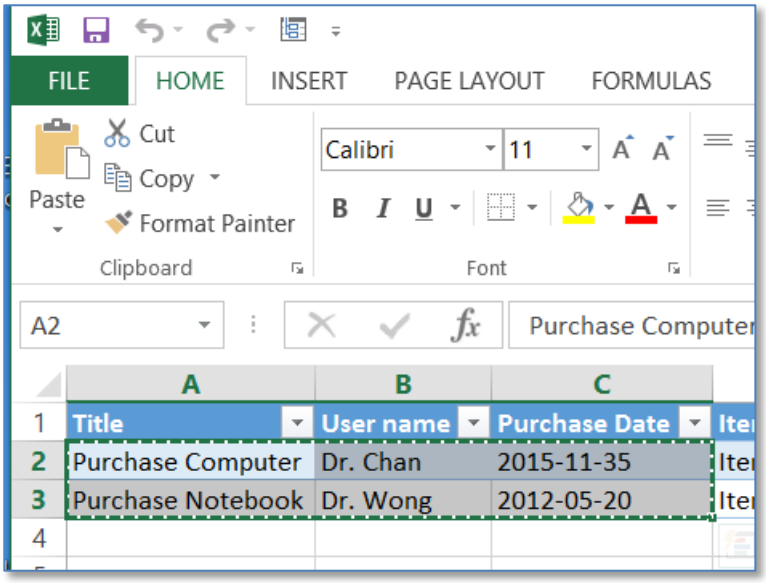
6. Give the name and other information of the column, click the 'Save'.



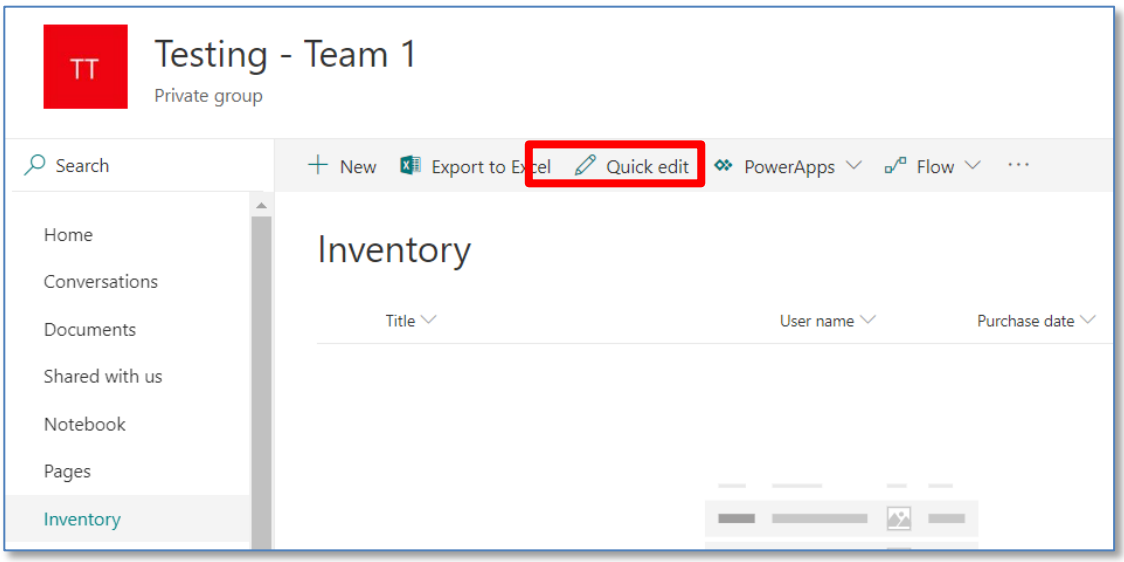
7. Two columns are created 'User name' and 'Purchase date'

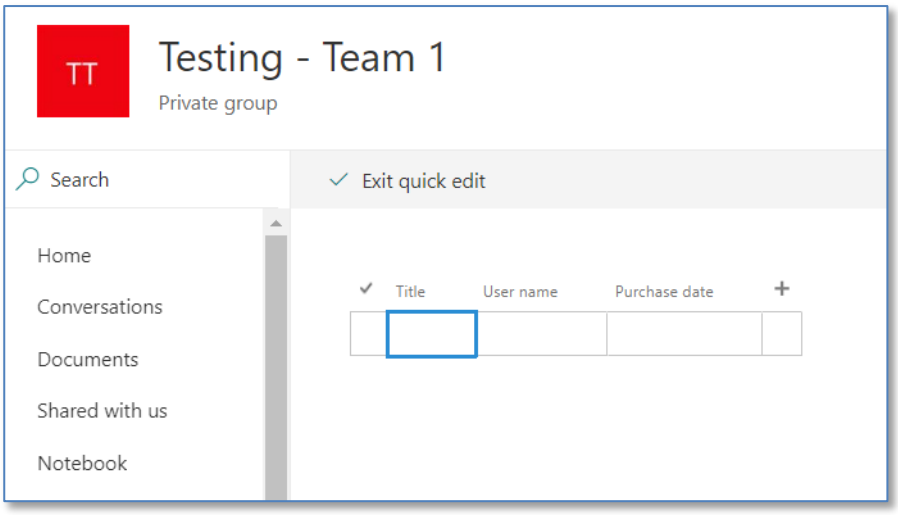


8. After all the column are created. Open the Excel file and select all the rows of the data, copy them.

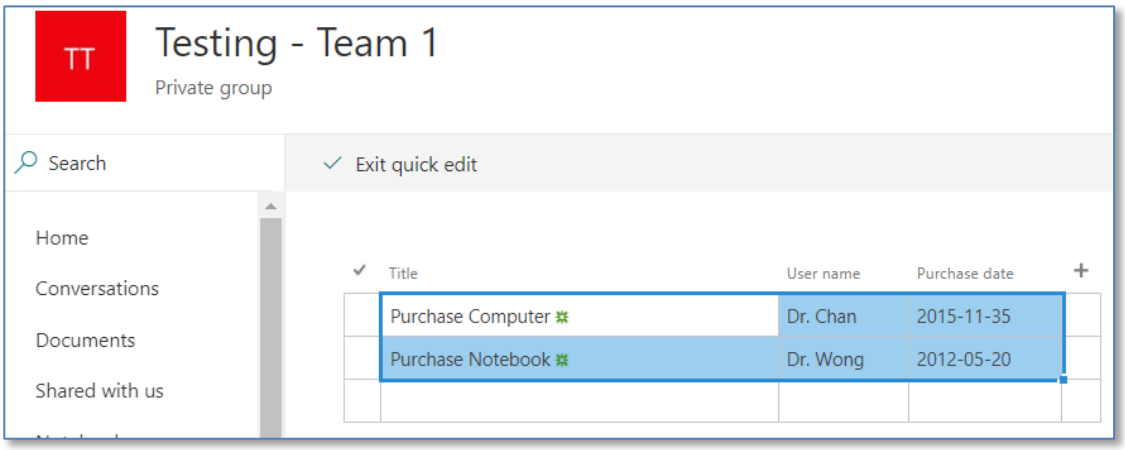


9. Click 'Quick edit' in the 'Inventory' list.





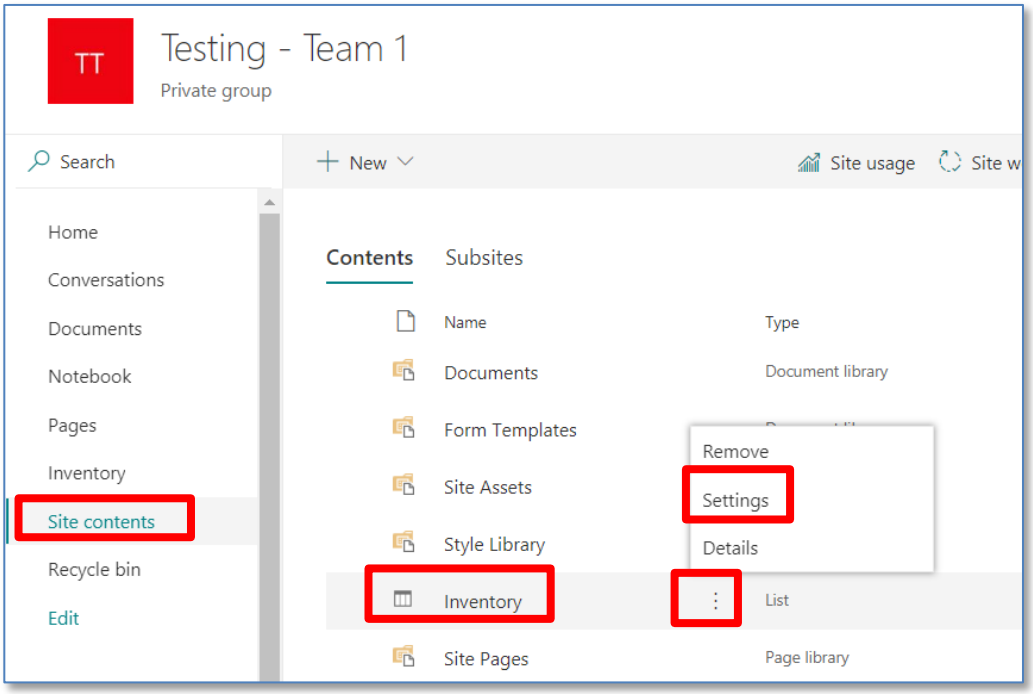
10. Paste the copied data in the related column and then '**Exit quick edit**'.



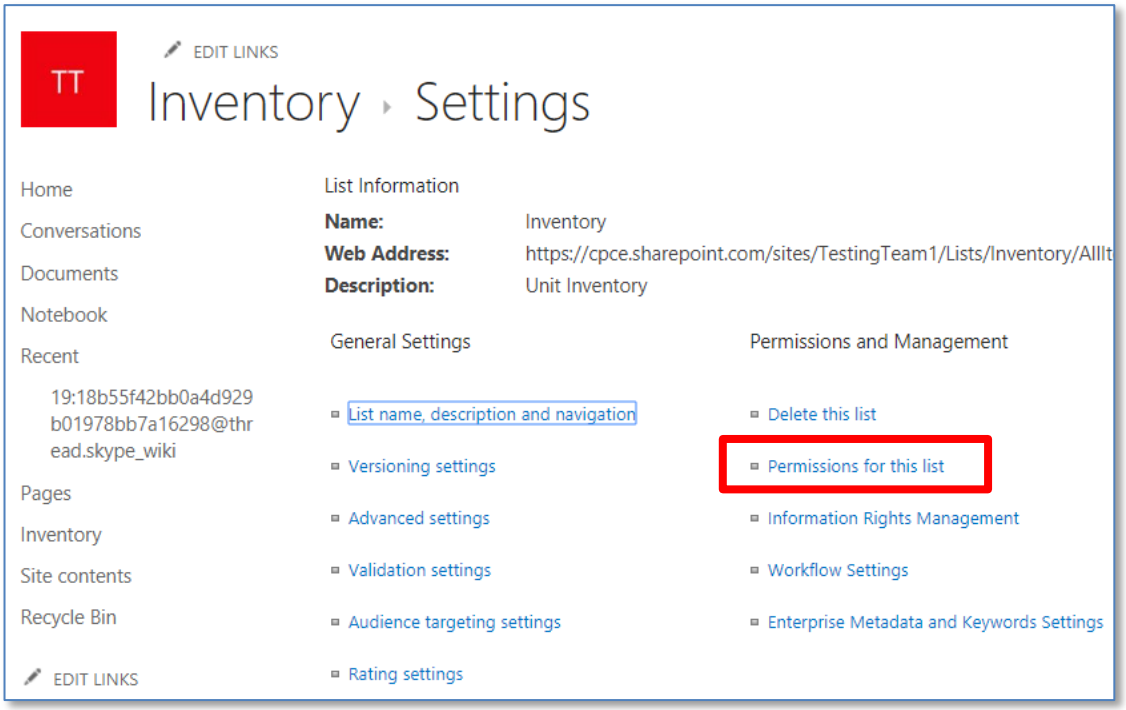
3.2.3 Check the permission of the list

1.

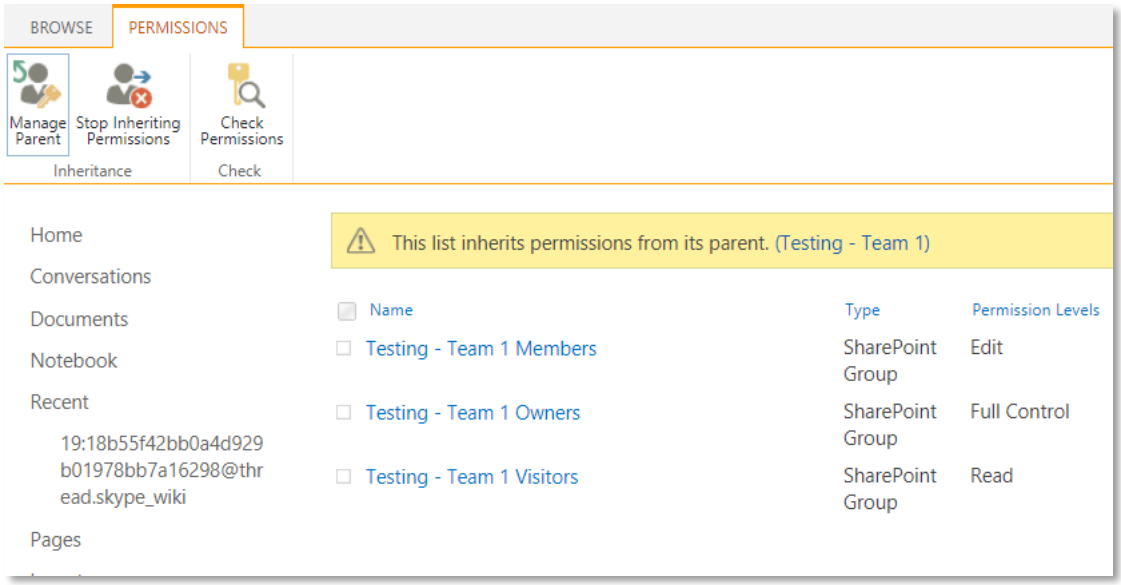
- Click the 'Site Content',
- Select the list e.g. Inventory
- Click the 3 dots icon
- Select the 'Settings'



2. Select the 'Permission for this list'

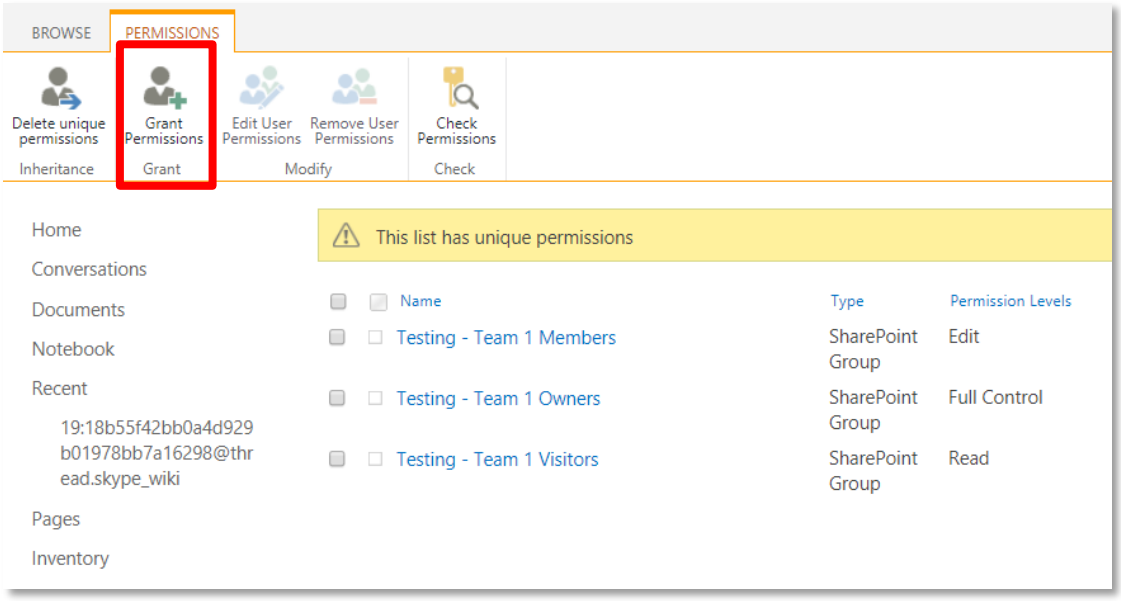


3. The current permission setting of the list



4. If you want to assign the specific staff with the specific permission, select the '**Stop Inheriting Permissions**'.

5. Select the '**Grant Permissions**' to grant the permission to specific staff.

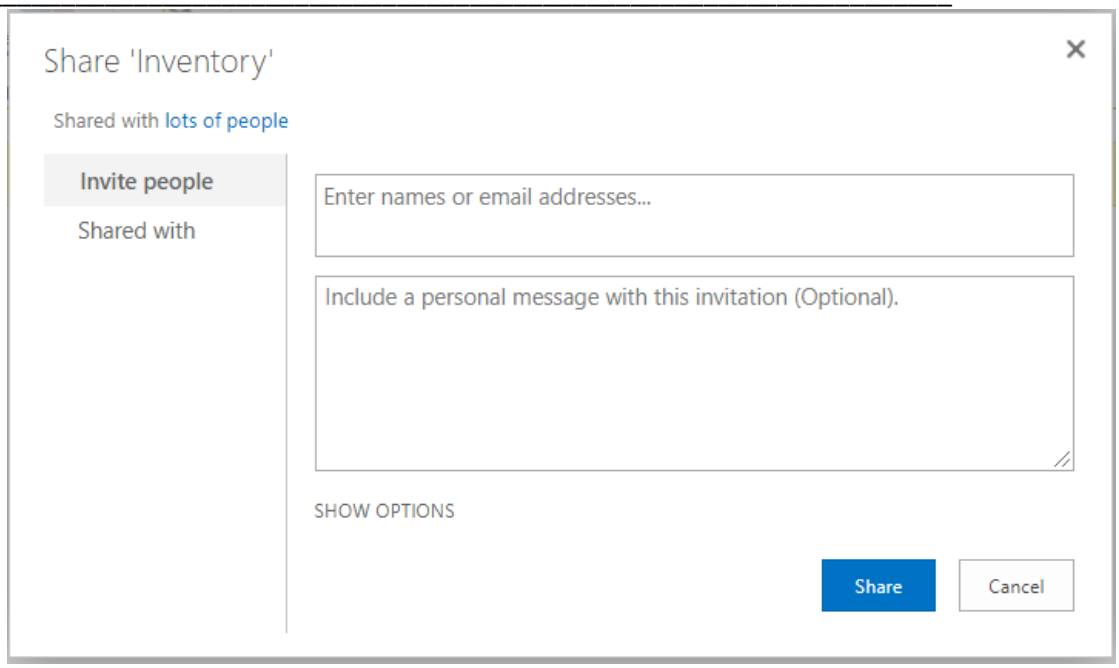


6. Type the name or email address of staff, click '**SHOW OPTIONS**' to select permission level, then click the '**Share**'.

   In the Share... dialog box, make sure Invite people is selected, and then type the names of the people or group you want to grant access to in the Enter names or email addresses... box.

   Click '**Show Options**' if you want to change the permission level.

   Then click '**Share**'.

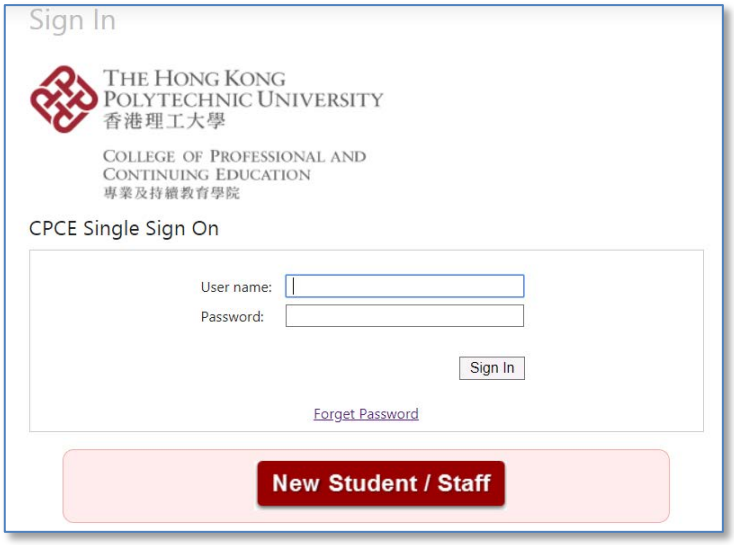

Share 'Inventory'
Shared with lots of people
Invite people
Shared with
Enter names or email addresses...
Include a personal message with this invitation (Optional).
SHOW OPTIONS
Share
Cancel

3.3 Migration of the Downloaded List to DMS

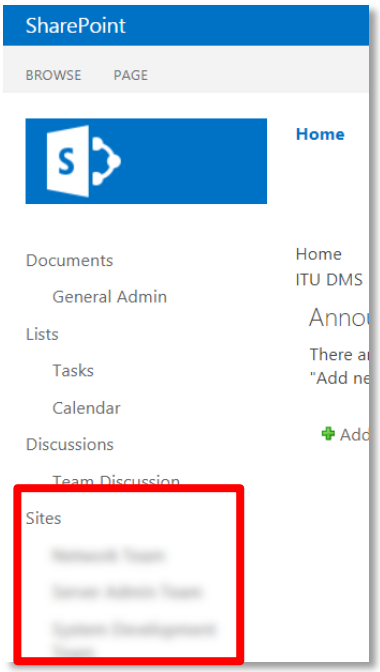
1. Assume your unit's administrator of the DMS had assigned the permission and created a sub-site for you to place back the data in your exported Excel file.

2. Login the DMS at https://dms.cpce-polyu.edu.hk/*[name of unit]*. Replace the [name of unit] with your unit name in the URL link e.g. https://dms.cpce-polyu.edu.hk/hkcc

3. Login in with your user name and email password.

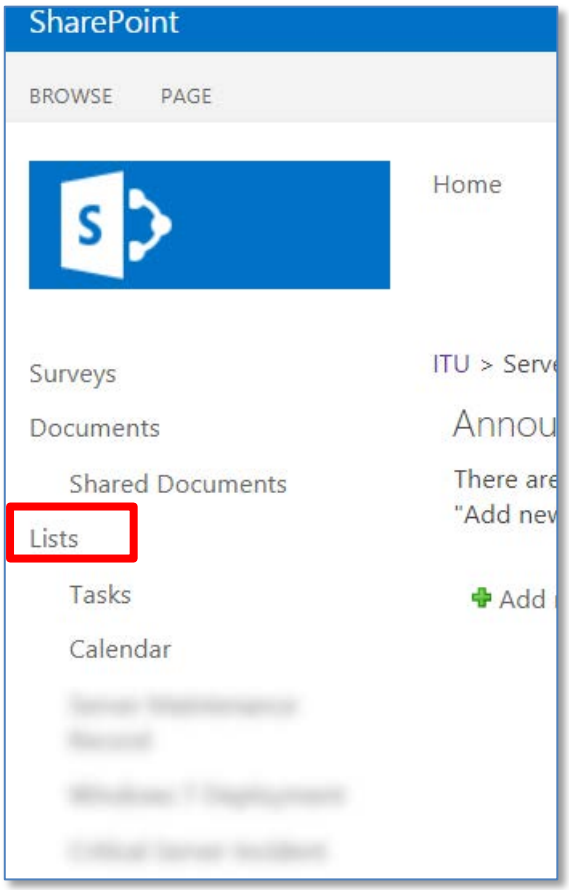


4. Go into the sub-sites under the '**Sites**' in the DMS which you want to upload the list.

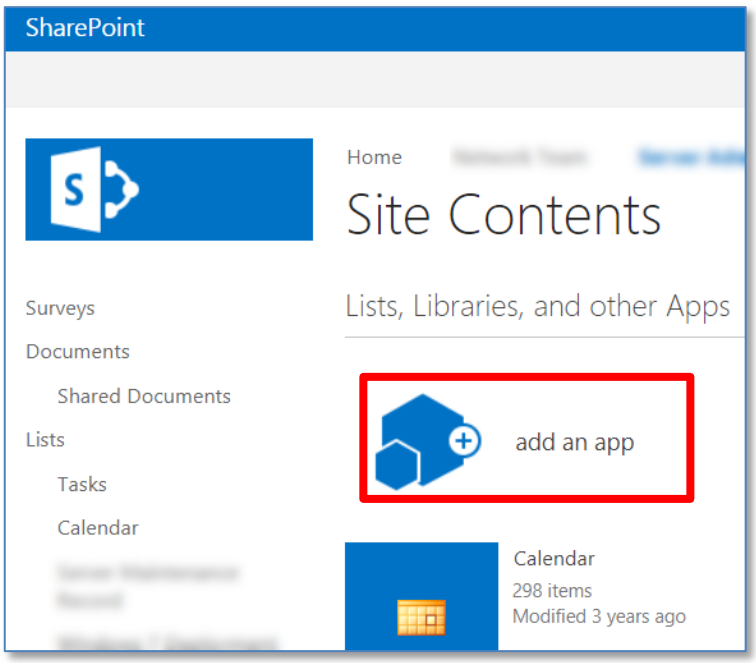


3.3.1 Create a List Library in DMS

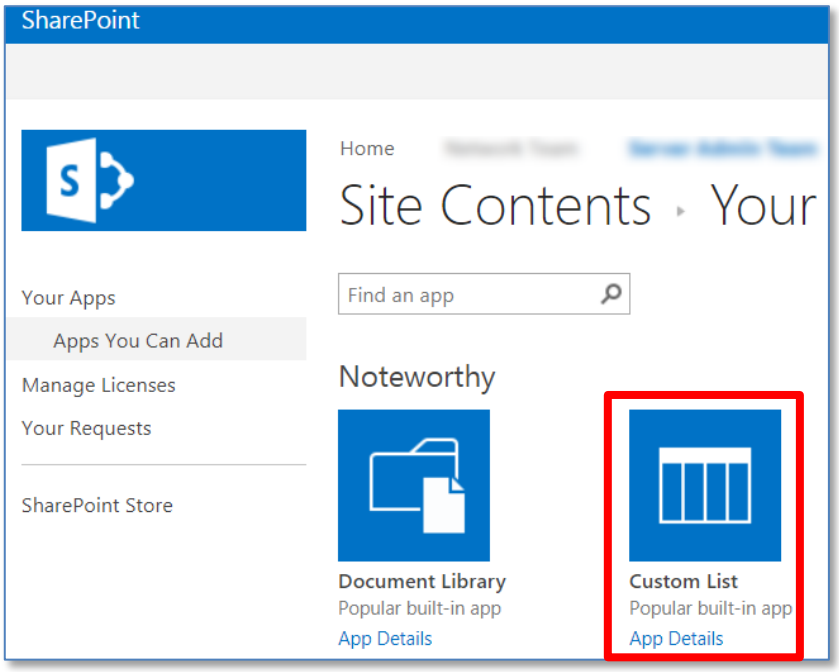
1. Create a new List, click the '**Lists**'



2. Click 'add an app'.



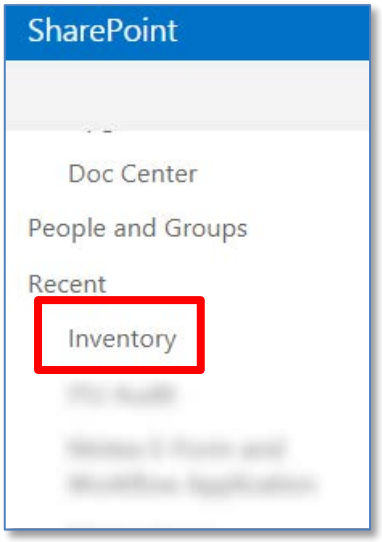
3. Select 'Custom List'



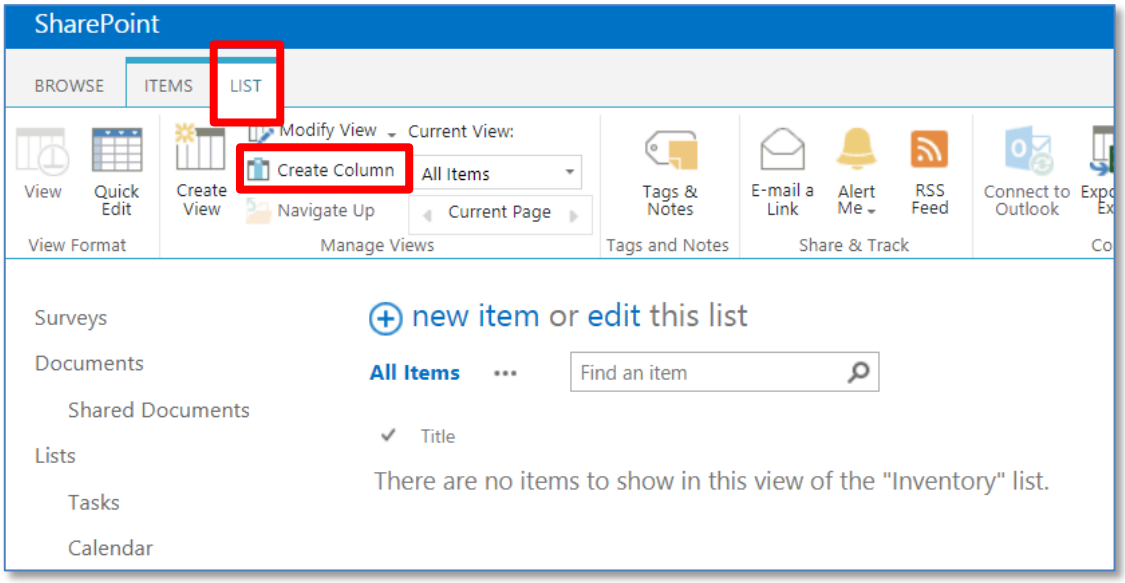
4. Input the name of the list and click 'Create' e.g. Inventory



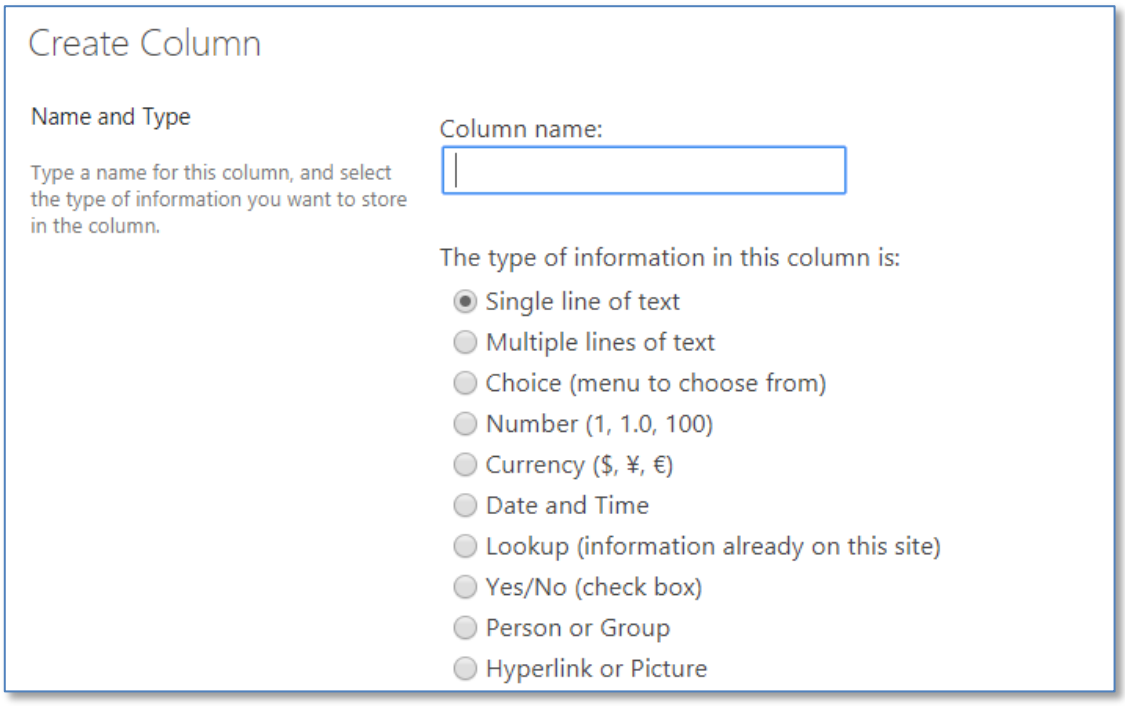
5. In the left pane, a 'Inventory' list is created.



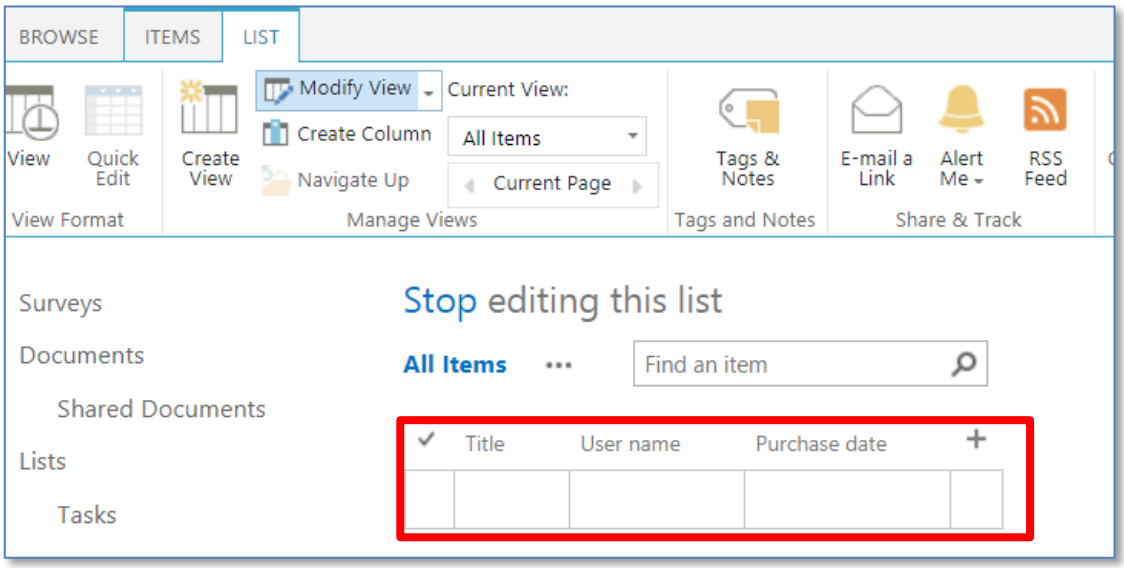
6. Click into the 'Inventory' list and click the '**List**' tab in the ribbon and '**Create Column**' to create the columns of the list with reference to your Excel file.



7. Create the columns and select the suitable type of information for that column.

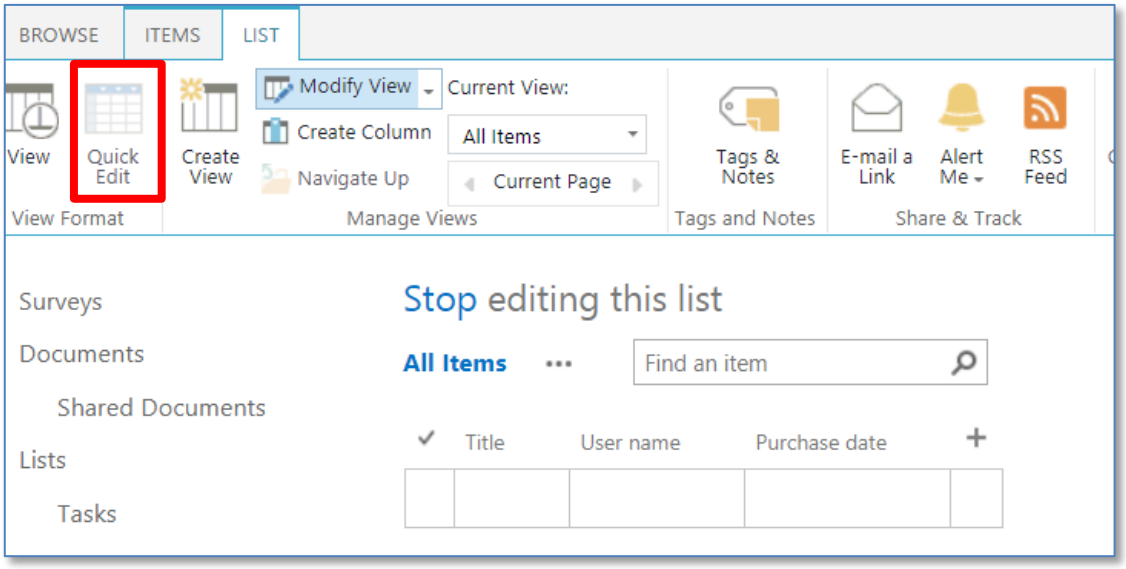


8. Two columns are created.

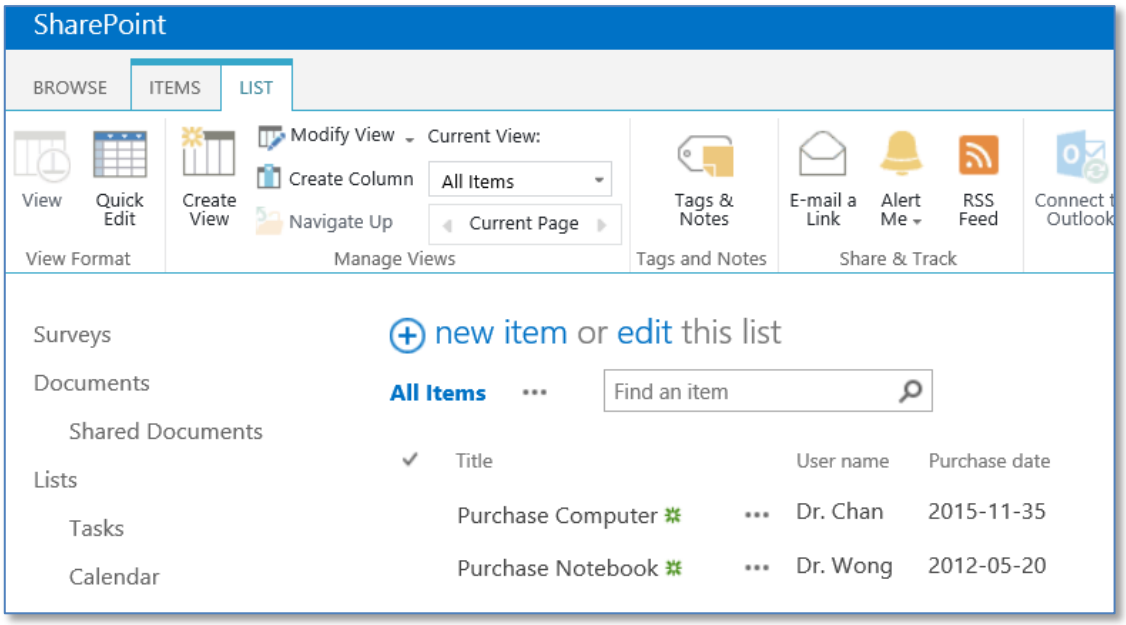


3.3.2 Migrate the Data in the Excel File to the List

1. Click the 'Quick Edit' and then copy and paste the data from Excel file to the DMS list. **(* MUST need to perform this step in Internet Explorer 11 or above browser)**

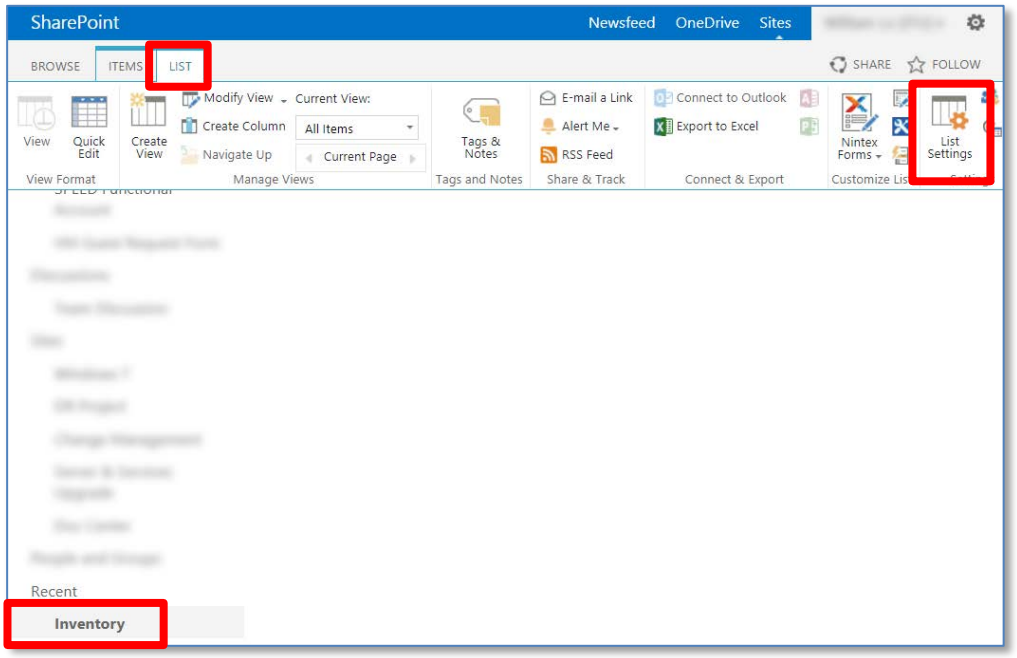


2. After that, click the 'Stop editing this list' and the data is imported.

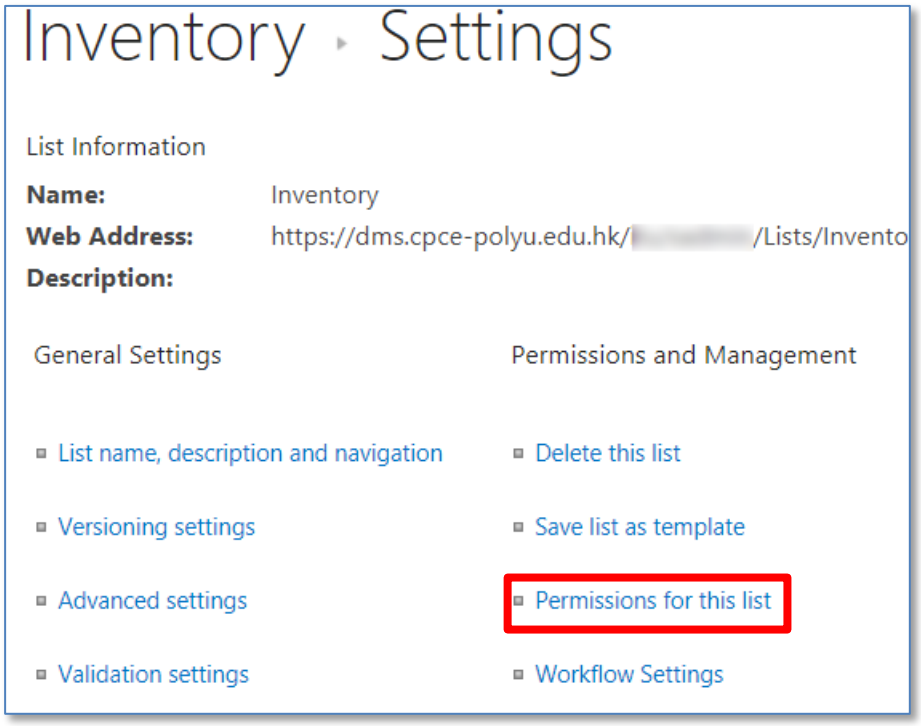


3.3.3 Check the permission of the List

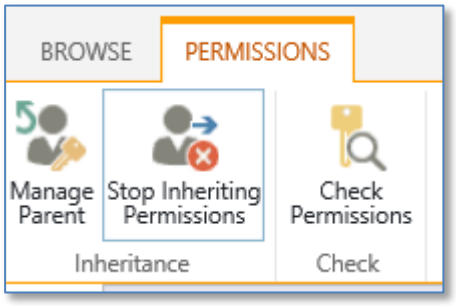
1. Go into the list e.g. Inventory, click the '**List**' tab and select the '**List Settings**' in the ribbon.



2. Select the 'Permission for this list'.



3. To break permissions inheritance from the parent, click '**Stop Inheriting Permissions'**.



4. Click '**Grant Permissions**' on the Permissions tab to assign unique permission.

   In the Share 'Inventory' dialog box, make sure Invite people is selected, and then type the names of the people or group you want to grant access to in the Enter names or email addresses... box.

   Click '**Show Options**' if you want to change the permission level.

   Then click '**Share**'.

