IM Aware
SharePoint Migration

Thanks for tuning in.
The Live Event will begin shortly!

Ask questions using the Q&A function.

Your microphone is automatically muted.

Your camera will not be in use.

Turn your audio up to ensure you can hear the presenter.

Enterprise Content Management Branch

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Directors Updates

IM Aware September 2024

Sherri Bower, Director Content Management Operations
Dan Arnold, Director IM Programs
Riza Gallerde-Aryee, Acting Director Records and Storage
Enterprise Content Management Branch
Data and Content Management Division

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Content Management Operations

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https://deepai.org/

CMO Updates

- **Technical Services**
    - **GovLabs.ai** Looking at intake for Sept-Jan to continue testing on FCT auto-classification.
    - Videos created for application developers
        - [Resources (sharepoint.com)](#)

- **FCT virtual assistant**
    - Bernie virtual assistant "chatbot" went live August 29
    - Updated and published 3 videos that provide information about the FCT and implementing it in SharePoint Online
    - Published two articles on FCT in Digital Advisor

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CMO Updates

- **eDiscovery**
    - Migrating existing eDiscovery site from SP 2016 to a new SPO site designed to provide litigation support information to general GoA employees and targeted audience groups, including custodians and legal teams

- **Schedule Modernization**
    - HR schedule in review with Schedule Review Committee
    - Finance schedule at ARMC for review September 16, 2024

- **Forms**
    - RFI for Software Modernization was posted and closed on August 13. The team are reviewing all submissions as the RFI informs the creation of an RFP.

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Information Management Programs

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Content Inventories

- Moving into our second last quarter for Content Inventories.

- Finalizing CI's from:
    - Arts Culture and Status of Women,
    - Justice,
    - Executive Council.

- Starting engagement with:
    - Energy and Minerals,
    - Immigration and Multiculturism,
    - Service Alberta and Red Tape Reduction,
    - Technology and Innovation,
    - Transportation and Economic Corridors.

- Completion date is March 2025.

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Advice and Consultation

- Top Requesters (Not TI)
  - Education
  - Public Safety and Emergency Services
  - Service Alberta
  - Children and Family Services
  - Seniors Community Social Services
- Number of Tickets
  - June - 107
  - July - 76
  - Aug - 57
- Top Categories
  - SPO
  - Retention Schedules
  - Disposition Support

New PQRs

- Digitization PQR
    - Digitization Processes (Actually digitizing files)
    - Digitization Services (Level 1 prep, inventorying, etc.)

- IMT Research and Advisory PQR
    - Research Services
    - Strategic Advice and Consultation
    - Research Materials, Resources and Tools
    - Access to specialists on per hour basis

- You can access either one through GoA.ITProcurement@gov.ab.ca

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Records and Storage

Updates

Active File Management

- Digitization Initiatives
  - Environment and Protected Areas
  - Municipal Affairs
  - Indigenous Relations
  - Education
  - Advanced Education
  - Affordability and Utilities
  - Public Safety and Emergency Services
- File room consolidation
- Collaboration with Robotics Process Automation
- Service requests transitioning to Bernie (AFM & TSD)

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Updates

Transfers, Storage and Disposition

- ARC Digitization Project
  - o Digitizing all the Destroyed Transmittals and uploading to Master Disposition in SharePoint.
    - Document Preparation – 26% complete
    - Documents Scanned – 26% complete (78,465 images)
    - Total Project Completed – 6% Complete

- Records Operations
  - o ARC Inventory validation project – 10% complete

Thanks

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SharePoint Migration

Three Perspectives – Technical, Information Management, and Business

Tammy Thomas, Laurel Broens, and Cassandra Docherty

September 2024

Agenda

SharePoint Migration Project
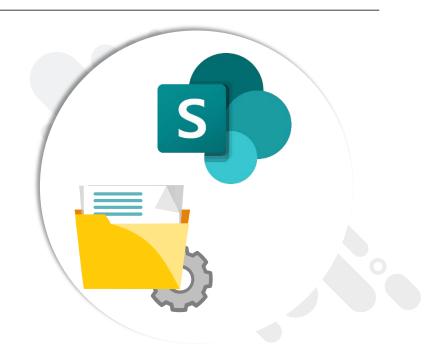
Plan and Prepare

Migrate / Move

Unpack and Redecorate

SharePoint Online Migration Project

- Moving SharePoint 2016 Sites to SharePoint Online (SPO) by December 2025.

- The project has over 18,000 sites.

- This is happening with all Ministries in the Government of Alberta.

Migration Roles & Responsibilities

Migration Leads

Information Controllers

Business Area (your team)

Collaboration Team, Information Management Programs, and Project Manager

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Benefits of Moving to SharePoint Online

Modern - Fully integrated into the entire m365 platform. Leverage reporting, alerts, automation & AI.
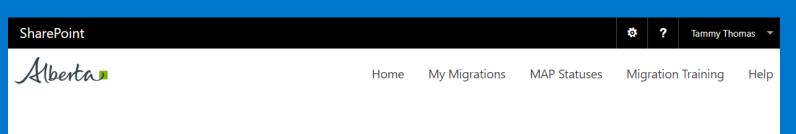
Secure - M365 offers a higher level of security and information compliance than any other tool at GoA.

Clean - The move empowers your staff to address obsolete permissions and orphan sites.

Accessible – Any where, any time access to your content. (Including mobile)

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Plan and Prepare

What is the scope of the SharePoint Migration Project?

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What elements *must* be considered prior to migration?

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What elements *should* be considered prior to migration?

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Any other elements to consider?

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Plan/Prepare

Technical	Information Management	Business
Site design	Identifying official records and cleaning transitory	Understand what your business does
Security and Access	Organization of information	Training
Exploring functionality of SPO	Information Controller	Change Management
	IM Consultations	Roles & Responsibilities
	Best Practices	Assign a PM

Migration and Move

What is the biggest challenge you have encountered working on a migration?

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What are some common themes you've seen in successful migrations?

What kind of training do you recommend for a new SPO site owner/user?

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Migrate and Move

Technical	Information Management	Business
MAP tool	Lifecycle management	Training
Migrating sites and subsites	Functional Classification	Change Management
Consolidating sites	Metadata elements	Communication timing

Unpack and Redecorate

What options are available to customize an SPO site?

What is one tip that you want to give someone that will be going through this journey?

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What is coming next for SharePoint online and Information Management?

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Unpack and Redecorate

Technical	Information Management	Business
Views	Reconfirm organization	Start using the site
Enhancements post-migraton	Plan for records lifecycle beyond migration	• Ongoing training • Develop a systems to create a better information management culture
Decommission previous repository	Ongoing support	

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Resources

For more information

- BERNIE tickets
  - SPO Migration
  - Information Management Advice and Consultation
- IMT Policy Instruments
- Functional Classification Taxonomy Wiki
- SPO Training Site*
- MAP Tool*

 * For Government of Alberta employees internal use only

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Thank-you

IM Aware
SharePoint Migration

Thanks for tuning in.

To join our mailing list email:

goa.informationmanagement@gov.ab.ca

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