

# Box

## Migration Checklist

### Helpful Tips for the Box Migration

- Allow the Box Migration Team to move your files for you.
- For unique cases, contact your local IT support.

## Pre-Migration

### Clean Up Box

- ☐ Delete unused Box files to ensure a fast migration.
- ☐ Locate and manually move files larger than 15 GB.
- ☐ Capture and save Box comments to avoid losing them.
- ☐ Transfer Box Notes to Word Documents, if you must preserve document formatting.
- ☐ Rename files with more than 400 characters in the path, to avoid migration errors.
- ☐ Save previous versions of files as separate documents if archiving is part of your business process.
- ☐ Accept pending collaborations in Box or they will be lost during migration.
- ☐ Move files stored in your personal Box account to a Non-Person Account, if applicable.

### Investigate

- ☐ Locate and update Box file links, embeds, or upload folders that are public or shared via Canvas or on a website. Only update Box files that impact current courses or websites. All other files will be migrated automatically.
- ☐ Investigate additional migration-specific training resources on the Box Migration website training and resources page: [storage.psu.edu/training-resources](https://storage.psu.edu/training-resources).

### Communicate

- ☐ Work with your local IT and colleagues to coordinate migration plans.
- ☐ Collaborate with local IT to identify new processes for special use cases involving Box workflows.
- ☐ Notify any file collaborator internal and external to Penn State when you will migrate from Box.

## During Migration

### Phase 1: Data Begins to Copy

- ☐ Continue to access, update, and save files.
- ☐ Add new collaborators to files and folders, if needed.
- ☐ Upload or create new files and folders.
- ☐ **Do not** access migrated files in OneDrive.
- ☐ **Do not** move, rename, or delete files or folders.
- ☐ **Do not** remove collaborators or change permissions.

### Phase 2: Migration Data Hold

- ☐ Wait for an email confirming files have migrated.
- ☐ **Do not** access migrated data in OneDrive.
- ☐ **Do not** access files or folders in Box.

## Post-Migration

### Locate

- ☐ Locate your files in the "Box Migration Data" folder of OneDrive and re-establish permissions with external collaborators.

### Review

- ☐ Review error report provided by the Box Migration Team or your local IT, if applicable.

### Communicate

- ☐ Send new OneDrive links to any file collaborators external to Penn State.
- ☐ Notify internal collaborators of completed migration and to access all your shared files in their OneDrive "Shared with You" tab.

