Going Forward

A basic set of preparation tasks to perform prior to an upgrade or migration to SharePoint 2010 are provided, along with the hardware and operating system requirements for SharePoint 2010 that it should be familiar with before embarking on a SharePoint upgrade or migration. By performing these tasks and being familiar with the requirements for SharePoint 2010 you can start to get a sense of the organization's best migration and upgrade path.

We provided a solid ground in the out-of-the-box upgrade and migration options. I’ve also discussed the ‘off-the-shelf’ Microsoft methods and reviewed the DocAve SharePoint Migrator tool with an eye toward the tools that you would have at your fingertips.

For organizations with smaller, simpler SharePoint 2007 environments and before too many commitments are made it doesn’t mean that it makes solid business sense for the organization. Without lingering unduly on the topic, an organization should have a basic sense of direction to move from an earlier version of SharePoint to the newest.

As mentioned in the checklist above, testing a restore is a critical step. The backups should be run with minimal risk because it’s read-only. As a best practice, I recommend that the product be evaluated and tested.

Colin Spence

SPECIAL ADVERTISING SUPPLEMENT TO SHAREPOINT PRO CONNECTIONS

February 2011

The Essential Guide to Migrating SharePoint Content

By Colin Spence

SharePoint migrations provide many challenges, but if done properly they can yield significant benefits to an organization. This Essential Guide provides an overview of the options you should consider when migrating to SharePoint 2010, including assessing readiness to migrate, an overview of the standard options, and the advantages of using AvePoint’s DocAve SharePoint Migrator tool. The guide also covers DocAve SharePoint Migrator’s compatibility with non-SharePoint data repositories.

When reviewing migration systems, form images of tools or other animals moving in an orderly fashion across great distances, and quite apt when talking about the data needs that is needed. You are sure that an in-Place Upgrade is a technical implementation, but I’ve found that these are few and far between and generally don’t meet the needs of most organizations (I discuss this further below). While many different types of SharePoint migrations are possible, due to the large number of SharePoint branded products that have been released by Microsoft over the years, this guide focuses on the most typical migrations occurring today, which tend to be from SharePoint 2003/2007 to SharePoint 2010.

Although SharePoint 2010’s in-place upgrade (ID 2007) and SharePoint Migrator (ID 2003) environments are still in pro-duction, they are less common and pose additional challenges due to the age of the software. For example, no direct migration path from the 1.0 or 2.0 versions of SharePoint migrations, including SharePoint Portal Server 2001, SharePoint Portal Server 2001, SharePoint Team Site and Windows SharePoint Services 2.0 to SharePoint 2010 is supported using Microsoft out-of-the-box tools. Using Microsoft techniques, the only way to migrate these older SharePoint environments to 2010 is to upgrade the servers and sites to SharePoint 2010 first, and then follow one of the valid migration paths. AvePoint’s SharePoint Migrator discusses this process in detail, as well as the documentation available from AvePoint to SharePoint 2010; but these tools aren’t reviewed in this article.

Beyond these two paths, there are the differences between the capabilities of these tools such as the SharePoint 2007 to 2010 migration tools discussed.

Assessing Reasons to Migrate

Without lingering unduly on the topic, an organization should have a basic sense of direction to move from an earlier version of SharePoint to the newest. This pre-upgrade check tool is an excellent example of the STSADM command-line tool. Assuming the SharePoint 2007 environment is completely upgraded, you can run this tool with minimal risk because it’s read-only and makes no modifications to any of the existing data in the server. Run the pre-upgrade check by typing

stsadm -o preupgradecheck

The pre-upgrade check runs through a number of tests and checks the environment for compatibility with SharePoint 2010 requirements. It produces a detailed report that outlines which areas of the environment are ready for upgrade, and which ones are in need of remediation before they can be upgraded.

Another bird’s eye view is to create an Excel grid of the different site collections and site and user permissions, as well as elements of content that are possible or not to be followed. For example, a key piece of information is whether the site to site migration will be similar. Similar to the processes of moving a house to another house, your site collections won’t be up and running for some time. The site collections aren’t collected or dumped to “stuff” that is in its life stage. Many sites or areas of sites that are currently in use will need to be corrected or be re-imported, or possibly be chosen to use SharePoint backups tools to back up the whole site collection or database to storage or tape, or use the sharepoint – export command to export individual sites.

As mentioned in the checklist above, testing a restore of a SharePoint 2007 site collection or even the same farm is always a good idea. True, it will take a number of resources to configure one or more new virtual or physical servers, and then install SharePoint and restore the site during the upgrade process. The easiest way to do this is to run the pre-upgrade check tool first, and then run the pre-upgrade check tool on each site farm to ensure that all is well. As mentioned above, the SharePoint 2007 environment is completely upgraded, you can run this tool with minimal risk because it’s read-only and makes no modifications to any of the existing data in the server.
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harePoint migrations provide many challenges, but if done properly they can yield significant benefits to an organization. This Essential Guide provides an overview of the options you should consider when migrating to SharePoint 2010, including assessing readiness to migrate, an overview of the standard Microsoft options, and the advantages of using AvePoint's DocAve SharePoint Migrator tool. The guide also covers DocAve's data compatibility with non-SharePoint data repositories.

Migrating SharePoint can sometimes figure in a list of tasks, such as an employee leaving the company, an organization being sold, or a merger or acquisition. Whatever the reason, the process of migrating SharePoint from one version to another can be complex and time-consuming. Understanding the options available can help you make the best decision for your organization.

**Assessing Reasons to Migrate**

Without lingering overly on the topic, an organization should have a clear reason to migrate to SharePoint platform. But if we narrow it down a bit, the main reason is to increase the efficiency and productivity of work. With SharePoint's many features and capabilities, organizations can benefit from increased collaboration, improved document management, and easier access to information.

**Assessing Readiness to Migrate**

Before deciding to migrate to SharePoint 2010, it's important to assess the readiness of the existing environment. This involves reviewing key factors such as server infrastructure, network connectivity, and user acceptance.

**Assessing Migration Options**

There are several migration options available, each with its own advantages and disadvantages. The choice of migration option depends on the specific needs and requirements of the organization.

**Preparing for the Migrate**

Before starting the migration process, it's important to prepare the target SharePoint environment. This includes setting up the necessary infrastructure, identifying required resources, and creating a plan for the migration.

**Migrate**

Once the target environment is prepared, the migration process can begin. This involves transferring data from the source environment to the target environment, configuring SharePoint settings, and testing the migration.

**Post-Migration**

After the migration is complete, it's important to review the results and make any necessary adjustments. This includes checking for any errors or issues, making sure the data is properly migrated, and ensuring that users are able to access the new SharePoint environment.

**Summary**

Migrating SharePoint requires careful planning and consideration. By understanding the reasons for migrating, assessing readiness, choosing the right migration options, preparing the target environment, migrating, and reviewing the results, organizations can ensure a successful SharePoint migration.

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Colin Spence is a Microsoft MVP and a SharePoint architect, programmer, and developer. He is the founder of AvePoint, a leading provider of SharePoint and document management solutions.

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**Figure 4: Job Detail Viewed from the Job Monitor**

as replacing a Single Line of text with a Message (Metadata text). Replace a source template ID or with a new template ID on a list or site level. This could be used to change SharePoint template IDs. Ajax files to template to a custom template to add functionality to corresponding content. 

**Filter options include:**

- Time Range settings based on created time or modified time.
- Version filters to set the number of versions captured, and whether major or only major and minor versions are captured.

Although this partial list of Mapping options and Filter options might seem overwhelming for organizations wanting to use the mapping process as a means of cleaning up the data that ends up in the SharePoint 2010 lists and libraries, there might be times when organizations choose to use these mapping options for other scenarios. The filtering options also offer added flexibility for organizations looking to ensure their content is properly archived. By using the filters, IT could ensure that the data that ends up in the SharePoint 2010 lists and libraries is properly categorized and organized. By filtering the data, IT could prevent the incorporation of irrelevant or outdated content into the SharePoint environment.

**As an aside:**

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In-Place Upgrade is off the table from the beginning. The benefits for SharePoint 2010 technologies need to be met perfectly, legacy code will still be on the server, which poses a risk during the upgrade process, which can provide challenges, as Figure 1 shows. In many cases include the previous versions only, as Figure 2 shows. A common requirement in many companies is the need to migrate content from sources not supported by the out-of-the-box tools. Take for example an organization with a WSS v2 farm that wants to keep all the data in the new environment and doesn’t want to change the taxonomy significantly. That want to keep all the data in the new environment and don’t want to change the taxonomy significantly. Due to the relative ease of the process, this is suited for most organizations running SharePoint 2007 and don’t want to invest in newer, typically more powerful hardware to run SharePoint 2010 and thereby provide the improved performance benefits. In many cases, you can configure the SharePoint 2010 farm from scratch to meet the needs of the organization for the next three to five years. To consider an In-Place Upgrade, the basic requirements for SharePoint 2010 farm is needed. Database Attachment Method

The following sections cover a number of capabilities provided by the DocAve SharePoint Migrator tool that provide valuable options with more complex migration scenarios.

Support for Multiple Data Sources

A common requirement in many companies is the need to migrate content from sources not supported by the out-of-the-box migration tools in SharePoint 2010. As an example, you may want to migrate data from a source that is not supported by SharePoint implemented, and you want to consolidate and migrate a single high-performance database to the SharePoint farm. Such a migration is complex with the aid of third-party tools. For example an organization with such a need (Farm 1) and a SharePoint 2007 farm (Farm 2), you want to consolidate content from Farm 1 to Farm 2. An out-of-box upgrade would require you to stop serving the Web (Farm 1) and consolidate it with the upgraded Farm 2 using the WS 2005 to WS 2010, and then using that SharePoint 2010 farm. And that’s just Farm 2, you would need to be upgraded to SharePoint 2010, and then you would need to migrate Farm 2 to Farm 3, which requires additional steps. Through this approach you can also migrate content without third-party product management or enterprise content management (ECM) tools such as Documentum, and leave the configuration and configurations intact.

The DocAve Migrator product family supports the following data sources.

• Windows SharePoint Services (WS) 2007
• Microsoft SharePoint Portal Server (SPS) 2003
• Microsoft SharePoint Services (WS) 2001
• Exchange Public Folder
• File Systems and Networked File Shares

Support for Multiple Data Sources

- BCP attempts to migrate all SharePoint content except the non-content databases prior to attempting to upgrade the content databases. This second hybrid approach is generally seen as overly complex without immediate apparent benefits, because SharePoint 2010, such as managed accounts. The DocAve Migrator product family supports the following migration targets:

- WS 2007
- WS 2007 SP2
- WS 2007 SP3
- Exchange Public Folders and SharePoint 2007
- SharePoint Foundation 2010, SharePoint Server 2010

Note that the appropriate combination of DocAve clients must be determined and you need to budget for those costs. The DocAve administrator console must be installed, and the agents must be installed on the source farm server and one destination SharePoint server. To offset this additional cost, typically the costs of outlay capitalizing or licensing, staffing-levels during the migration project are reduced by a slight variation on from sources not supported by the out-of-box migration tools in SharePoint 2010.

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In-Place Upgrade

It's a fairly rare situation where an In-Place Upgrade is the best approach. That being said, it might be a logical step to take for certain SharePoint 2010 implementations, where the server environment meets the requirements of SharePoint 2010 and is new enough to be upgraded as an offering of the organization. If so, Microsoft will collaborate the configuration and documentation management needs of the organization with the upgrade.

To consider an In-Place Upgrade, the basic requirements for the environment must be met by the existing hardware. These are:

• SQL Server 2008 R2 64-bit
• SharePoint Server 2010 64-bit
• SharePoint Foundation 2010 64-bit
• SharePoint Foundation 2010 32-bit
• Service Pack 4 (or later) for WSS v3 and MOSS 2007
• SQL Server 2008 64-bit
• SQL Server 2005 32-bit

Many times, organizations may find that SharePoint 2007 doesn't meet these requirements, so the option for the In-Place Upgrade may be more of a justification. Note that SharePoint 2010 has higher recommendations for the environment and that the upgrade is not always the best approach. That being said, it might be a logical way to go if the SharePoint 2007 environment meets the requirements for SharePoint 2010, such as managed accounts.

Note that in the Microsoft "official" steps (http://technet.microsoft.com/en-us/library/ff481914.aspx) the Database Attach Method involves configuring the new SharePoint 2010 farm in read-only mode in SQL Server Management Studio, and then taking the existing SharePoint 2007 farm's databases in SQL Server Management Studio for the new SharePoint 2010 farm to be used as-is. This, of course, one of the Microsoft "hybrid" upgrade methods can provide a benefit with SharePoint 2007 sites that need to be kept in a "known" environment while SharePoint 2010 is configured. The following sections cover a number of capabilities provided by the DocAve SharePoint Migrator tools that provide value to companies with SharePoint 2003 to 2010, and SharePoint 2007 to 2010 migrations. I'll review the tools needed to provide such benefits, which will be helpful, because "try before you buy" is a key step in the setup process. The following section walks through the details of the migration. You can schedule the migration to run automatically, click the Run Now button to run the job immediately. End result is typically the costs of outside consulting or increasing the cost, typically the costs of outside consulting or increasing the cost, typically the costs of outside consulting or increasing the cost.
collections or databases, but then we'll know why it works and hopefully overcome any issues encountered along the way. A host environment is preferred when organizations are migrating to the production environment.

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To consider an In-Place Upgrade, the basic requirements is that the server hardware should meet Microsoft's recommended specifi cations for RAM and processor capabilities that can also include the previous versions only, as Figure 2 shows.

In many cases, the existing SharePoint 2007 hardware doesn't meet these requirements, so the option for the In-Place Upgrade may not be feasible. Note that SharePoint 2010 has higher recommended specifi cations, where the server hardware meets the rigid requirements. SharePoint 2007 farms are considered to be legacy code, which many purists prefer. And knowing the risk involved in performing an In-Place upgrade, any SharePoint administrator would want to keep the existing look and feel of SharePoint 2007. SharePoint 2010 offers a Managed Accounts feature, where the administrator can create managed accounts with user rights and allow end users to manage the settings of the accounts. However, the available permissions must not be based on the old permissions of SharePoint 2007.

Hybrid Upgrade Methods
Microsoft also offers the option of Hybrid upgrade methods, where the SharePoint 2007 farm is taken offline and the content databases are exported to SQL Server Management Studio, and then the farm is upgraded to SharePoint 2010. This method is the Database Migration Tool approach. In this method, the content databases are detached, and an in-place upgrade is performed on the SharePoint 2007 farm, which will ensure that the other databases such as the core databases that have been detached. The administrator then reattaches the content databases into the new farm and then performs the upgrade process. This essentially breaks the process into two steps, which might be a drawback if any content databases are not non-content databases prior to attempting to upgrade the content databases.

This second hybrid approach is generally seen as overly complex without immediate benefits. If the upgrade fails after the content databases have been detached, the farm will be down until it can be fixed or rebuilt.

DocAve SharePoint Migrator
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This second hybrid approach is generally seen as overly complex without immediate benefits. If the upgrade fails after the content databases have been detached, the farm will be down until it can be fixed or rebuilt.

In the Read-only Database approach, the new SharePoint 2010 farm is configured, then the SharePoint 2010 upgrade environment is set to read-only, and the content databases are backed up from the old farm and then restored to the new farm. The databases are then attached in SQL Server Management Studio and the upgrade proceeds, updating the content databases. In this hybrid, it is a good idea to stop the old farm from taking any changes to the content databases.

Support for Multiple Data Sources
A common requirement in many companies is the need to migrate content from sources not supported by the out-of-box migration tools in SharePoint Server 2010. As at an out-box migration tool, the best approach is to use SharePoint implemented, and they want to consolidate and manage them in a single, high-performance content management system. Such a migration is complex without the aid of third-party tools. One example of an organization with MFS is Farm1 (Farm1) and SharePoint Server 2007 (MFS 2007) Farm (Farm2) (Farm2) is a consolidation, to consolidate content in Farm1 and SharePoint Server 2013 (Farm2) farm. An out-of-box upgrade would require a best practice to be used in the Farm2 (Farm2) 2007 to 2013 upgrade, which will be used in the Farm2 (Farm2) upgrade. To perform that upgrade, it will be necessary to detach the content databases from the Farm1 and then upgrade the Farm2 (Farm2) farm to SharePoint 2010. This adds complexity to the migration process. If the organization wants to migrate the content to SharePoint 2010, then they could use the Hybrid upgrade method, which is the most complex of all the upgrade methods.

The DocAve SharePoint Migrator tools that provide value-added migration options in multiple environments is the DocAve SharePoint Migrator tools that provide value-added migration options in multiple environments. The DocAve SharePoint Migrator tools that provide value-added migration options in multiple environments.

SharePoint 2010
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If you have questions, Avenue supports dozens of forums where you can join the discussion. Avenue also offers a seven-day free trial of the tool to test drive its features and benefits.

**Assessing Reasons to Migrate**

Without lingering unduly on the topic, an organization should migrate to a newer version of SharePoint, not just because it is the most current version, but also because it makes sense for the organization. There is no particular point in time, or period of time, when a migration becomes a necessity. It is a decision that should be made when it is in the organization’s best interest. For example, if you’re running SharePoint 2003 or older, you might consider migrating to SharePoint 2010 because it will allow you to explore new features and tools that aren’t available in older versions.

**Preparing for Migrate**

Before you begin your migration project, you should ensure that your environment is ready for the migration. This includes testing and making sure that all systems are up and running. It is also important to consider how you will handle the migration itself. Some organizations choose to migrate in batches, while others choose to migrate all at once.

**Retrieving SharePoint Data**

When it comes to migrating SharePoint data, Avenue offers a wide range of tools to help you. Whether you need to migrate single sites or entire farms, Avenue has you covered. Avenue also provides a free seven-day trial of its tools to help you get started.

**Summary**

In conclusion, migrating to SharePoint 2010 can be a complex process, but with the right tools and strategies, it can be made much easier. Avenue’s DocAve SharePoint Migrator is a powerful tool that can help you seamlessly migrate your data to SharePoint 2010, ensuring that your organization is up and running in no time.