**The Essential Guide to Migrating SharePoint Content**

**By Colin Spence**

**as replacing a Single Line of Text column with a Managed Metadata column.**

**Replace a source template ID with a new template ID on a list or site level. This could be used to change SharePoint Farm file templates to a custom template to add functionality to corresponding sites.**

**Filter options include:**
- Time Range settings based on creation time or modification 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 migration process as a means of cleaning up their SharePoint environments, it can be very useful by applying the filters. IT could migrate content that has been changed in the last two years while discarding the rest. Or it could select content based on a specific site, then—further reduce the amount of data—based on a specific set of columns.

As you also see in Figure 3, the Plan-Builder provides a page for ensuring a clean and successful migrated environment. The DocAve Storage Optimization tools were used to archive data, you could migrate this content without needing to first restore the data to the new site, and—further reduce the amount of data—based on a specific set of columns.

The new source does need to be configured and ready to receive content, but the DocAve migration tools make this process very easy and intuitive. Should the organization choose to roll on from older data, or reduce the number of versions of documents migrated, or change templates used, or levels of permissions defined, the DocAve tools are all-purpose throughout the DocAve tools.

**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, SP can get a sense of the organization’s best migration and upgrade path.

We provided a solid foundation 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 disposal.

For organizations using smaller, simpler SharePoint 2007 implementations, the hybrid Road-Only Database approach is typically the recommended method from my experience because it’s least intrusive in the tool box. Should the organization have a sophisticated toolset provided by AvePoint in the DocAve SharePoint Migrator product, you want to save the migration process. I recommend that the project be evaluated and tested.

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

Colin Spence is an MCT and a MCTS in SharePoint and a FarmArchitect with AvePoint, focusing on the design, implementation, and support of Microsoft technologies, solutions, and services. He has implemented SharePoint-based solutions since 2003 and has over 20 years of experience providing IT-related services to a wide range of organizations. He has worked with AvePoint products since 1999 and has authored several bestselling books on SharePoint products, including SharePoint 2010, content management, and web publications and speakers regularly on SharePoint technologies.

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 Microsoft options, and the advantages of using AvePoint’s DocAve SharePoint Migrator tool. The guide also covers DocAve compatibility with non-SharePoint data repositories.

**Assessing Reasons to Migrate**

Without lingering unduly on the topic, an organization should have a reason to move from one SharePoint platform to another. Just because a new version of SharePoint is available doesn’t mean that it’s the right solution for your business. IT needs to make sure that the organization's business goals are met and that it needs something new that the new version offers. As SharePoint is a platform for business, it’s important to make sure that you have a good reason for migrating.

Microsoft has completed migration to SharePoint 2010 environment. This Essential Guide can help you decide on the best course of action.

When you are doing SharePoint migrations, you should know the overall health of the SharePoint environment. This Essential Guide provides tips on how to do a pre-upgrade check to determine if your site is ready for upgrade, and which ones are in need of remediation before they can be upgraded.

Another best practice is to create an Excel grid of the different site collections and sites in your farm to help you predict the challenges that may come in the new environment. By generating a report with this grid, you can see the different sites that might be involved in the SharePoint 2010 environment. It can be better to decide on the overall health of your site.

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The data that ends up in the SharePoint 2010 lists and libraries options might seem overwhelming for organizations wanting to upgrade to SharePoint Server 2010 for content externalization. Once in SharePoint Server 2010, you can then migrate from based storage and utilizes Microsoft EBS and RBS interfaces. Migrate only the last major version of documents. To a new production site, migrate older content to an archive. Although this partial list of Mapping options and Filter options might seem overwhelming for organizations wanting to use the migration process as a means of cleaning up the data that ends up in the SharePoint 2010 lists and libraries, it can be very useful. By using the filters, IT could migrate content that has been changed in the last two years and eliminate content that is no longer relevant in the current environment. The new SharePoint site or site, and then—further reduce total data migration to a new environment or site. As you roll into such an environment, the DocAve tools. Permissions migrated, these options are all possible through the DocAve tools.

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, IT can start to get a sense of the organization’s best migration path and upgrade path. We provided a solid guide for the out-of-the-box upgrade and migration options. We’ve also discussed the “off-the-shelf” Microsoft tools and reviewed the DocAve SharePoint Migration tools with an eye toward the tools that you would have at your fingertips.

For organizations with smaller, simpler SharePoint 2007 implementations, the hybrid Read-Only Database approach to the upgrade check utility that lets administrators check the readiness of their environment for upgrade to SharePoint 2010. The pre-upgrade upgrade check runs as an extension to the SQL Server service. Run the pre-upgrade check by typing

```
stsadm -o preupgradecheck
```

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Assessing Reasons to Migrate
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download -preupgradecheck
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The pre-upgrade check runs through a number of tests and checks the environment for compliance with SharePoint 2010 requirements. It produces a detailed report that outlines which areas of the existing farm 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 SharePoint 2010 environment. For example, a key piece of information is whether the server is in a SharePoint 2010 environment. If it can be better decided on the server, you should review the overall health of the SharePoint server.

- Check the server logs on the SharePoint front-end server. In terms of the SharePoint server administrator will quickly be able to obtain a lot of information from these logs. A good place to start is the site collection; take a look in that location. You could also review the server logs or use the site collection to export individual sites.
- Review the sites of the SQL content databases to see if there is any hard data there that could or is being upgraded to the SQL server.
- Review the SQL maintenance plans to ensure that log files are being shrunk, and that the database consistency checks are running.
- Review a recent backup of the SharePoint 2007 environment. Just because the backup looks like it has been completed doesn’t mean it can actually be restored, and many times organizations don’t test restores often enough.
- Compare the production form a new, un-customized farm with a tool such as WinDiff and look for differences.
- Review the web.config files for the 2007 sites (typically located in the C:\Inetpub\wwwroot\virtualdirectories folder) for safe controls that aren’t Microsoft, look for application keys (for example the text “Pulpit@Token”)
- Look in the GAC (typically the C:\Windows\Assembly folder); third-party DLLs are a sure sign that there might be some custom code in the environment.
- Look in the solution store (Central Administration->Operations Settings) Global (Application Management), because many customizations are deployed through solution.
- Look in the SharePoint hive, especially in the layouts, images, and themes folders (C:\Program Files\Common Files\Microsoft SharePoint Web Server Extensions) (2)
- Review the programs from the Control Panel to look for their party applications.
- Service Pack 2 for SharePoint 2010 includes a predefined check utility that lists administrators, the readiness of their environment for upgrade to SharePoint 2010. This predefined check runs as an extension to the STSADM command-line tool. Assuming the SharePoint 2010 environment is completely upgraded, this can run the tool with minimal risk because it’s read-only and makes no modifications to any of the files on the server. Run the pre-upgrade check by typing

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In-Place Upgrades

It’s a fairly rare situation where an In-Place Upgrade is the best approach. That being said, it might be logical to take a step back for certain SharePoint 2010 implementations, where the server and database hardware resource requirements of SharePoint 2013 and new is enough to be concerned about hardware as offering a way that will meet the cloud investments and development management needs of the organization.

To consider an In-Place Upgrade, the basic requirements of the new SharePoint 2010 farm must be met by the existing hardware. These are:

- SQL Server 2008 R2 or later
- SP 2 of WSS v3 or MOSS 2007 SP 2 on the farm

In many cases, organizations that don’t have new farm hardware, they need to meet these requirements, so the option for an In-Place Upgrade should be evaluated. Note that SharePoint 2010 has higher requirements than SharePoint 2007, and that choosing this upgrade method can reduce the overall time and cost of the migration. The business case for an In-Place Upgrade should be evaluated against the other options available.

In the same way, there are cases where the SharePoint 2007 farm is not configured based on recommended Microsoft specifications several years after deployment, and these recommendations might not be met. The products supported by Microsoft for In-Place Upgrades include the previous versions only, as Figure 2 shows.

Finally, the risks involved in performing an In-Place Upgrade are generally the same as those for other versions. The primary risk is a failure during the upgrade process, which can happen even in a relatively simple or small SharePoint 2007 environment. Even if the In-Place Upgrade goes perfectly, legacy code can cause unforeseen issues that could cause problems. For these and other reasons, the In-Place Upgrade is generally not the “best” upgrade option for most organizations.

SharePoint 2007 farm is left operational and is in an read-only mode. The hybrid upgrade approach is used in a way where the content databases from the SharePoint 2007 farm, which will still exist if the content databases remain on the server. The method involves using SQL Server Management Studio and taking the form to the SharePoint 2007 farm. In this case, the hybrid approach can reduce the time to upgrade SharePoint 2007 farms, and users might not have been trained on the new features and interface, or might not be able to upgrade the content databases. The two hybrid upgrade methods can be used when compared to the pure Database Upgrade Approach.

Hybrid Upgrade Methods

Microsoft also offers the option of “hybrid” upgrade, which includes a Microsoft SharePoint Upgrade Wizard and the Detach Database Approach (see the Microsoft SharePoint Upgrade Wizard section). As with the previous section, this approach provides the ability to keep the existing look and feel of SharePoint 2007. In some cases, it makes sense to not immediately upgrade SharePoint 2007 farm to SharePoint 2010, but rather retain the SharePoint 2007 look and feel, so the visual upgrade options don’t give the ability to upgrade SharePoint 2007 farm to SharePoint 2007 farm to SharePoint 2010 farm.

SharePoint 2007 farm to SharePoint 2010 farm. The databases are then attached in SQL Server Management Studio, and the upgrade process continues. This essentially breaks the process into two steps, which can be any amount of time (days or hours), as long as the non-content databases are upgraded to SharePoint 2010 prior to upgrading the content databases.

This second hybrid upgrade is generally used to upgrade only a certain portion of the existing environment. If the upgrade fails after the content databases have been disconnected, the farm will be down until it can be fixed or rebuilt.

DocAve SharePoint Migrator

Many organizations have a need to migrate from one third-party migration tools. There could be a number of reasons for this: some organizations test one or more migration methods discussed above, only to find that the upgrade process is more complex than expected. In some cases, the use of third-party tools can provide a solution to these challenges. The examples of third-party tools are provided by the DocAve SharePoint Migrator tools that provide value-based migration options with more complex options.

Support for Multiple Data Sources

Support for multiple data sources means that various data sources can be used to store and retrieve data. This is useful for organizations that have multiple data sources, such as databases, fileservers, or other sources. The key advantage of DocAve SharePoint Migrator is that it allows for the management of multiple data sources.

In the Read-only Database approach, the new SharePoint farm is not configured, and the Read-Only Database Upgrade (see the Microsoft SharePoint Upgrade Wizard section). As with the previous section, this process provides the ability to keep the existing look and feel of SharePoint 2007. In some cases, it makes sense to not immediately upgrade SharePoint 2007 farm to SharePoint 2010, but rather retain the SharePoint 2007 look and feel, so the visual upgrade options don’t give the ability to upgrade SharePoint 2007 farm to SharePoint 2007 farm to SharePoint 2010 farm.

DocAve SharePoint Migrator Migrate Migration Plan Builder Screen

While I don’t have room to review all these options, some key features available from the Mapping and Filter tools. These tools allow for the management of complex data sources. The main features include:

- Common Settings
- Site Configuration
- List
- Permission
- Alerts
- Characters

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- Site
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doesn't meet these requirements, so the option for the upgrade option for most organizations. Due to the relative ease of the process, this method is generally the best approach. That being said, it might be a logical choice in a relatively simple or small SharePoint environment. The risks involved in performing an In-Place Upgrade are generally much lower than those in other methods, so the risk of failure during the upgrade process can happen even in a relatively simple or small SharePoint 2010 environment. Even if the In-Place Upgrade goes perfectly, legacy code can still become mixed with new code, which could cause future problems. For these reasons and others, the In-Place Upgrade is generally not the best upgrade option for most organizations.

**Database Attach Method**

For many organizations, the Database Attach Method is the best option. This method provides the best performance and you don't have to worry about downtime. The database Attach Method is especially useful for those organizations that have time constraints and don't want to change the current technology. Due to the relative ease of the process, the Database Attach Method is also well-suited to organizations that have time constraints and don't want to change the current technology. In the Read-only Database Attach method, the new SharePoint 2010 databases are created and the new farm is set up to read-only content. The databases are then attached to SQL Server Management Studio and the upgrade process begins, upgrading the content databases. In this method, it is possible to perform a full upgrade or a hybrid upgrade, where a combination of databases is upgraded. Each method has its own advantages.

**Hybrid Upgrade Methods**

Microsoft also offers the option of Hybrid upgrades, which allow you to upgrade one or more content migration tools. There could be a number of reasons for this research; some organizations test one or more migration methods discussed above, only to find that the upgrade of the existing farm doesn't completely resolve the problems and then decide to investigate third-party options. Other organizations might have need not meet the out-of-the-box features and tools, and they look for these features in third-party tools. The following sections cover a number of capabilities provided by the DocAve SharePoint Migrator tools that provide value in migration scenarios with more complex requirements.

**Support for Multiple Data Sources**

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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, some organizations have an Exchange 2010 farm and want to consolidate and migrate the content to SharePoint. Some of these companies want to maintain and use their Exchange 2010 farm as their primary email source, while others want to use SharePoint 2010 as their primary email source. A key attribute of both of these scenarios is that the users won't be impacted because SharePoint object model APIs are used for all activities, so downtime is typically not needed. The following sections provide a number of capabilities provided by the DocAve SharePoint Migrator tools that provide value in migration scenarios with more complex requirements.

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In-Place Upgrades
It’s a fairly rare situation where an In-Place Upgrade is the best approach. That being said, it might be logical to take a step back for certain SharePoint 2010 implementations, where the server constraints and requirements of SharePoint 2010 and new enough to be upgraded. As an offering of support for these environments, Microsoft will provide a solution that will meet the collaboration and document management needs of the organization.
To consider an In-Place Upgrade, the basic requirements are:
• A SharePoint 2007 farm already running SharePoint 2007 and available to be upgraded for planning.
• RAM and processor capabilities that can also be upgraded. Note that SharePoint 2010 has higher recommendations for RAM and processor capabilities that can also be upgraded.
• Products supported by Microsoft for In-Place Upgrades, as discussed, the Read-only Database approach is really just a View Upgrade Option, which is helpful, because “try before you buy” is a key step in making a decision.

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 2010. As an example, when troubleshooting a SharePoint implementation, and they want to consolidate and manage their documents in a single, high-performance environment. Such a migration is complex without the aid of third-party tools.

Microsoft also offers the option of third-party migration tools. There could be a number of reasons for this example; some organizations test one or more migration methods discussed above, only to find that the upgrade is not as seamless as previously expected and then decide to investigate third-party options. Other organizations might have needs not met by the out-of-box tools, and they look for these features in third-party tools.

The following sections cover a number of capabilities provided by the DocAve SharePoint Migrator tools that provide value-added migration options with more comprehensive tools. The hybrid approach is ideal for a site level. A key list that is used by many users on a daily basis can be filtered or modified to customize the settings.

DocAve SharePoint Migrator
Microsoft offers a number of tools that can be used to build a migration plan that’s right for your environment.

Figure 3: DocAve SharePoint Migrator Plan Builder Screen
The DocAve Extender offloads SharePoint BLOBs to file to the SQL Server content databases. This is also true if the could migrate this content without needing to first restore Storage Optimization tools were used to archive data, you migrate only the last major version of documents. site, and then—to further reduce total data migrated—migrate content that has been changed in the last two years. By using the filters, IT could cull or trim older data, or reduce the number of versions of the migration from the DocAve interface. Figure 4 shows

Assessing Reasons to Migrate
Without lingering unduly on the topic, an organization should determine the reasons to move from one SharePoint platform to another. Just because a new version of SharePoint (or any other software) is on the market doesn’t mean that it makes solid business sense for the organization. This Essential Guide SharePoint migrations provide many challenges, and results in terms of site, web, lists, and items migrated. does not mean that it makes solid business sense for the organization. This Essential Guide

best practices (such as replacing a single line of code with a Manage Metadata column).

• Replace a source template ID with a new one at the list or site level. This could be used to change sites created from a Team Site template to a custom

• Version filters to set the number of versions captured, but whether major or minor versions are captured.

Although this partial list of Mapping options and filters might seem overwhelming for organizations wanting to use the migration process as a means of culling data that the end results in terms of site, web, lists, and items migrated.

Figure 4: Job Detail Viewed from the Job Monitor

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new source (which can be a variety of products, as dis-
cussed above) and a SharePoint 2010 farm (or other target, as discussed above) and then to evaluate the best ways of migrat-
ing the content to the new site without facing additional
work on the part of the IT team responsible for the migra-
tion. The new source does need to be configured and ready to
create content, but the DocAve migration tools make the
process very easy and intuitive. Should the organization choose to run on the site older data, or reduce the number of versions of documents, or change templates used, or levels of versions migrated, these options are all possible through
the DocAve tools.

Going Forward
A basic set of preparation tasks to perform prior to an up-
grade 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 en-
abling on a SharePoint upgrade or migration. By perform-
ing these tasks and being familiar with the requirements for
SharePoint 2010, IT can start to get a sense of the organiza-
tion’s best migration and upgrade path. We provided a solid grounding in the out-of-the-box upgrade and migration options. I’ve discussed the “off-
hands” methods and reviewed the DocAve SharePoint
Migrator toolset with an eye toward the tools that you would have at your fingertips.

For organizations with smaller, simple SharePoint 2007 implementations, the hybrid Base-Only Database approach is typically the recommended method from my experience because it is the least impactful on the source data. Should the organization have a more sophisticated toolset provided by AvePoint in the DocAve SharePoint 2010 migration process, I recommend that the product be evaluated and tested.

Colm Spence, a MCT and a MCITP in SharePoint and a Group Partner at Convergent Computing, performs in the roles of Senior Architect, Practice Manager, and Technical Writer for the organization. He focuses on the design, implementation, support of Microsoft-based technology solutions, with a current focus on Microsoft SharePoint technologies. He has been implementing SharePoint-based solutions since 2003 and has over 20 years of experience providing IT related services to a wide range of organizations. He has worked with AvePoint products since 2007. Colm has authored several bestselling books on SharePoint products, including SharePoint 2010, creating dozens of publications and speaks regularly on SharePoint technologies.

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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 migrating to SharePoint 2010, includ-
ing 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 compatibility with non-SharePoint data repositories.

With the existence of numerous screenshots of tools or other animals moving in an orderly fashion across great distances, there is often quite a bit of clip art about the data that needs to be moved. You can argue that an In-Place Upgrade is technically a migration, but I’ve found that these are few and far between and generally don’t meet the needs of most organizations (I discuss this 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 last decade, this may be the most typi-
cally the recommended method from my experience

Review the web config files for the products of the EW sites (typically located in the ‘C:|wwwroot|ew友|VirtualDirectories’ folder) for safe controls that aren’t Microsoft, look for application keys (for example the text key “PublicFolderToken”).

Look in the GAC (typically the C:\\Assembly(As-
semly_folder)) third party DLLs are a sure sign that
you have something custom in the environment.

Look in the solution store (Central Administration - Operations tab - Global Configuration (Management), because many customizations are deployed through these.

Look in the SharePoint hive, especially in the layouts, images, and themes folders (typically C:\Program Files\Common Files\Microsoft SharePoint\Web Settings\extension.dlls).”

Review the programs from the Control Panel to look for third party applications.

Service Pack 2 for SharePoint 2010 includes a pre-
upgrade check utility that lets administrators check the
readiness of their environment for upgrade to SharePoint 2010. This pre-upgrade check doesn’t replace the SPCADM command-line tool. Assuming the SharePoint 2010 environment is completely upgrade ready, you can run this tool with minimal risk because it’s read-only and makes no modifications to any of the code in the server. Run the pre-upgrade check by typing

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ized farm with a tool such as WinDiff and look for differences.

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ized farm with a tool such as WinDiff and look for differences.

As mentioned in the checklist above, testing a restore
tests and checks the environment for compliance with
SharePoint 2010 requirements. It produces a detailed report that outlines which areas of the existing site environment are ready for upgrade, and which ones are not in need of remod-
ification before they can be upgraded.

Another best practice is to create an Excel grid of the different site collections and sites and then record the differ-
ences. A tool that can help you to predict the challenges that might lie in line with

By Colm Spence

• Review the SQL maintenance plans to ensure that files are being shrunk, and that the database consistency check processes are running. This Essential Guide

• Review a recent backup of the SharePoint 2007 environment. Just because the backup tools that aren’t Microsoft, look for application keys (for example the text key “PublicFolderToken”).

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ized farm with a tool such as WinDiff and look for differences.