

The page features a decorative design with two blue circles of varying sizes and shades, one smaller one in the upper right and a larger one in the lower right. Two thin blue lines intersect to form a V-shape, with the circles positioned at the points where the lines meet.

Migrating to SharePoint 2010

Don't Upgrade Your Mess

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Introduction

May 12th 2011 marks the first anniversary of the release of SharePoint 2010, but what has the uptake been for the new platform? More importantly what are the best options for migrating from SharePoint 2003 or SharePoint 2007 to this latest version?

Global 360 carried out a survey of 1700 individuals and organizations to find out the depth of penetration of the 2010 platform. As of January 2011, SharePoint 2010 deployments have caught up with its predecessor, SharePoint 2007 (see [Figure 1](#)).

| January 2011 Global 360 Survey Results | |
|---|-----|
| Considering SharePoint | 4% |
| Not Considering SharePoint | 1% |
| Own SharePoint 2003 and are using today | 4% |
| Own SharePoint 2007 and are using today | 43% |
| Own SharePoint 2010 and are using today | 44% |
| Own SharePoint but have not deployed | 4% |

Figure 1

If you are one of the four percent still using SharePoint 2003 or one of the 43 percent currently on 2007, what are your options for migration? What are the lessons learned from the 44 percent of companies that already migrated?

Before migrating to SharePoint 2010 there are a number of considerations companies need to take into account:

- SharePoint 2010 is only available in the 64 bit architecture
- 2010 requires Windows server 2008 SP2 or Server 2008 R2
- A 64 bit version of Microsoft SQL server is required, this includes: Microsoft SQL 2005 service pack 3; Microsoft SQL 2008 service pack 1; Microsoft SQL 2008 R2
- In place upgrades require MOSS 2007 SP2
- Organizations need to check their 2007 environment (by going to **central admin | Operations | Server in Farm**) to confirm they are running at least version 12.0.0.6421
- For those organizations running SharePoint Portal Server 2003 they will need to first upgrade to MOSS 2007 (Note, you will still be limited on upgrade options to SharePoint 2010 because of the 64 bit operating system requirement)
- If running MOSS 2007 SP2, it is strongly recommend that organizations run the stsadm –o preupgradecheck, this is a none destructive check and will report back on problems that you will encounter with your current 2007 environment during the upgrade process
- Run the preupgradecheck during off peak hours because it will place a load on the servers
- Any customizations will need to be manually set up again
 - Check any changes made to your web.config file
 - 3rd party webparts
 - Custom columns
 - Any metadata changes you have made
 - Content types added
 - Permissions

Migration Options

Microsoft provides limited options if you are a SharePoint 2003 user. Since 2003 does not support 64 bit Windows, users have relied on third party migration tools as the best way to move to 2010.

SharePoint 2007 users can use the in place upgrade or database attached migration strategies as long as their SharePoint 2007 was installed on a 64 bit version of Windows server. However, this may not be the best (and most viable) way to migrate.

The biggest problem with an in place upgrade and database attach migration is the down time suffered. For an enterprise, this could mean many hours of downtime. In addition, the in place upgrade is an all or nothing scenario – all SharePoint servers will need upgrading and once started there is no way back!

The database attach strategy is less risky for enterprises as it allows organizations to set up a new 2010 SharePoint farm and attach content databases. However, all farm settings will need reapplying i.e. all permissions and any audiences will need setting and recreating as well as any previous customizations will also need re-setting up.

With Office 365, companies need to evaluate if they want to move to an on-premise SharePoint or a hosted SharePoint or have both on-premise sites and hosted sites. Office 365 includes a hosted version of SharePoint 2010 along with Exchange 2010 and Lync making it an all in one cloud solution for many companies. For organizations looking to move to a hosted solution, examining migration options becomes a must. Both the in place upgrade and database attach methods are not supported for Office 365 and a third party migration tool will be needed.

Whether your existing architecture supports in-place upgrades or if you have to move to a new environment, SharePoint 2010 provides a good opportunity to reorganize stale content and take advantage of new SharePoint 2010 features. Don't just migrate your SharePoint mess to 2010 – take the time to classify and organize it by applying metadata tags or removing old content, deleting multiple versions and archiving content. This will enhance your use of SharePoint 2010 by making content easier to search and govern.

Migration Tools – What You Need To Know

For many companies, a SharePoint migration tool will be the best and most cost effective way to migrate to SharePoint 2010. Not all migration tools perform the same. When evaluating third party tools, organizations should consider:

- Is the migration tool agentless or do you need to install on your SharePoint servers?
- What are the support options?
- Do you have a size limit on what you move?
- Are you migrating content to an online SharePoint offering?
- Are you moving content from Exchange public folders?
- Are you migrating content from file shares?
- Can you migrate content from both SharePoint 2003 and 2007?
- Do you want to change the content type during the move?
- Do you want a long term tool to manage your content or just a move it once?

MetaVis Migrator for SharePoint

The good news is that MetaVis Migrator offers a complete migration tool that can easily handle all of the scenarios listed above including migrating to Office 365.

For example, MetaVis Migrator does all the tasks needed to reorganize existing data into an efficient SharePoint 2010 environment. During this process MetaVis Migrator allows you to: split and merge sites; split and merge lists; change list locations and site hierarchies; replace content types for SharePoint items; enhance items metadata by introducing new field values; and replace existing lookup, choice and string fields with SharePoint 2010 managed metadata fields. It can do all this from one tool using a single Windows Explorer like wizard driven interface.

With MetaVis Migrator, you can migrate to SharePoint 2010 or Office 365 from:

- SharePoint 2003
- SharePoint 2007
- File Shares
- Exchange public folders
- Exchange mail box
- BPOS and Other Hosted SharePoint

As a SharePoint administrator and consultant, one of the things I always take into consideration is do I need to install agents on the server? Or does the migration product use web services to perform all the tasks? MetaVis is unique; it is agentless and does not require components to be installed on the server making it ideal for migrating to 2010 or the cloud.

For example, with MetaVis Migrator organizations can run the install straight from a Windows workstation with nothing installed on the server side. If you are using SharePoint in the cloud, it becomes extremely difficult to use third party tools that require server side installs.

MetaVis Migrator has a five minute install with very little configuration - only connect to the server from a workstation and you are good to go. While the product is extremely simple to use, it is also very robust not only migrating content (sites, lists, etc), it also allows you to classify or reclassify content as you move. More importantly, when Migrator is used as part of the MetaVis Suite, it becomes a full SharePoint information architecture platform enabling organizations to design taxonomies and manage content. Most importantly, MetaVis becomes tool used on a daily basis to maintain well organized SharePoint sites. MetaVis Migrator can be used to help with task management and becomes a critical part managing your SharePoint environment.

How to Use MetaVis Migrator

The interface of MetaVis Migrator is very clean, easy to navigate and analogous to Windows Explorer in its functionality, as you can see from the illustration below (See [Figure 2](#)).

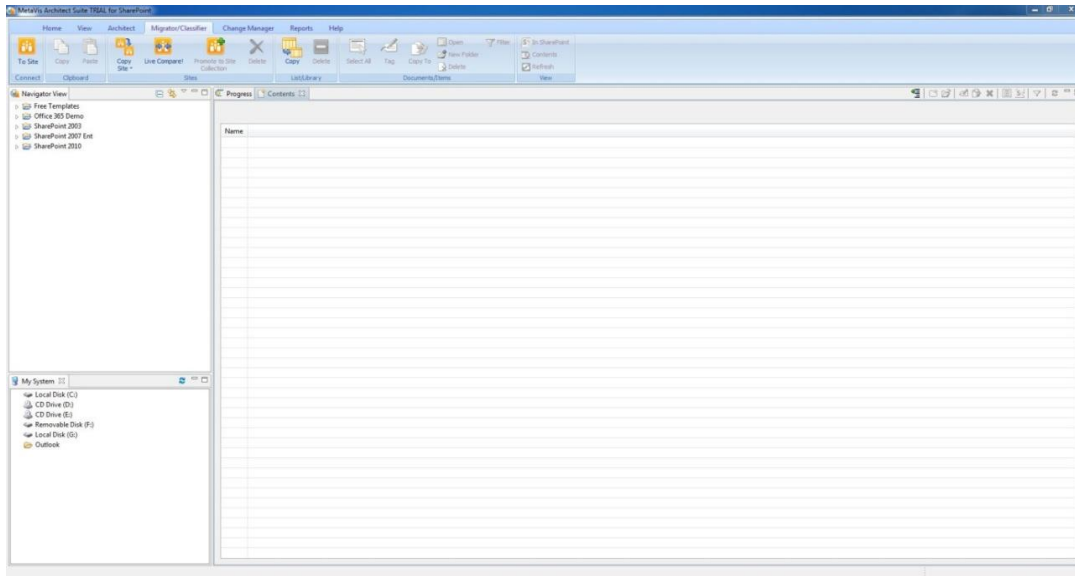


Figure 2

The ease of use of MetaVis is phenomenal. It is as simple as right clicking on an object or even an entire site and selecting copy to migrate the site. The example below demonstrates how quickly you can migrate a site (See Figure 3):

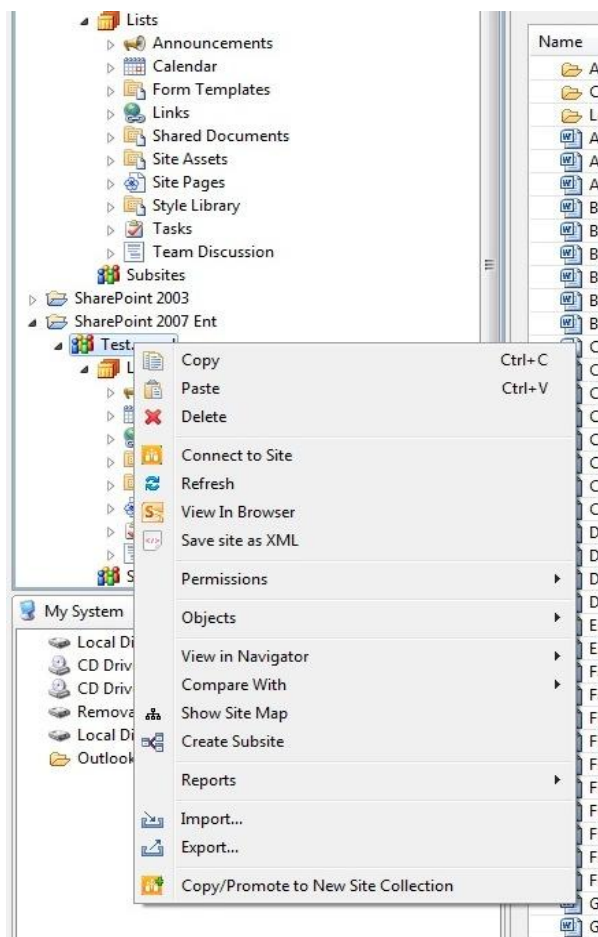


Figure 3

Once you right click and choose paste you will be presented with a dialogue box with 3 options (See [Figure 4](#)):

- **Copy Site to existing site**
 - The source site will be copied to an existing target site
- **Copy site to new site**
 - The source site will be copied as a sub-site of the target site
- **Copy/Promote to new site collection**
 - The source site will be copied promoted to a new site collection

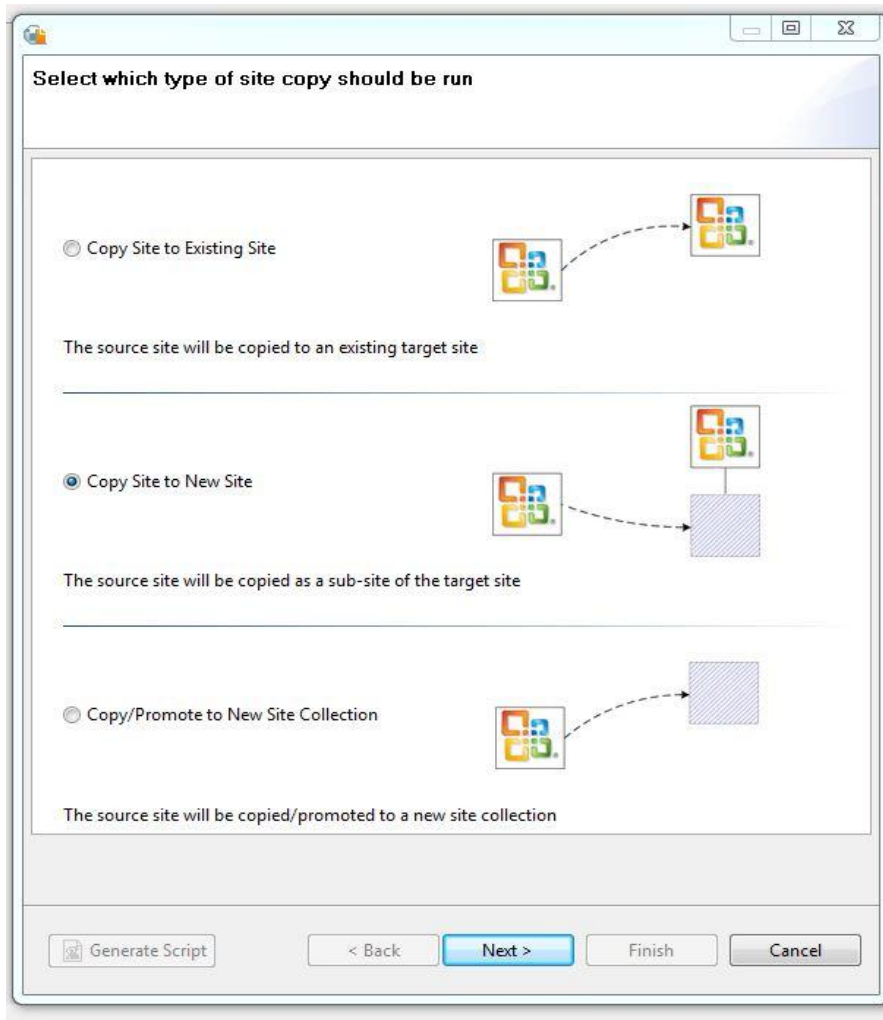


Figure 4

For this example, we chose to copy to a new site. Next, you will be presented with some advanced options:

These are broken down into 4 sections (See [Figure 5](#))

- **Site copy options**
 - Copy Content Types
 - Copy Sub Sites
 - Copy Site Permissions

- Copy Site Groups
- Copy Web Parts
- Copy Site Collection Features
- Copy Features
- Copy SharePoint Designer Features
- Copy Master Page Gallery
- **List copy options**
 - Copy Lists and Libraries
 - Copy Versions
 - Copy All Versions
 - Copy Most Recent Versions
 - Copy Permissions
 - Copy Views
 - Copy InfoPath
 - Copy SPD Workflows
- **Advanced options**
 - Apply Filter
 - Re-Map Users
 - Re-Map Site And List Templates
- **Look and feel options**
 - Copy Title, Description, Icon
 - Copy Navigation
 - Copy Tree View
 - Copy Site Theme
 - Copy Master Page Settings
 - Copy Top Link Bar
 - Copy Quick Launch

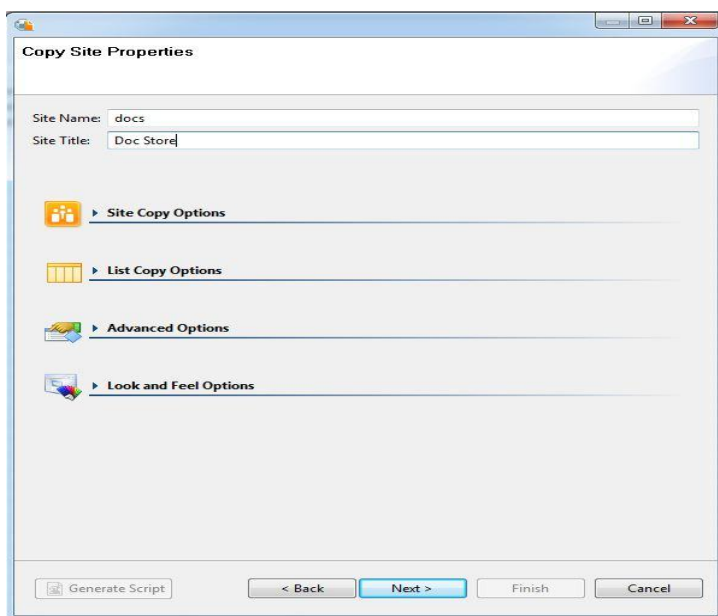


Figure 5

Click next and finish. The copy process will begin (See [Figure 6](#))

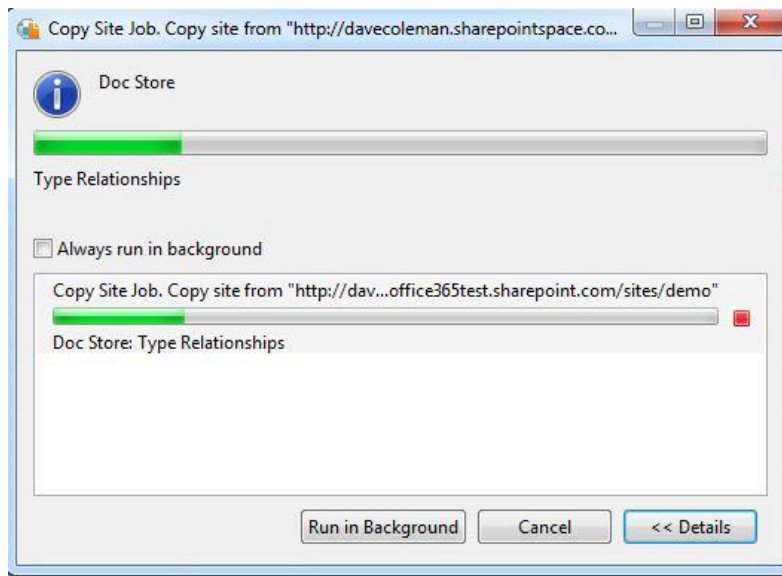


Figure 6

Once finished, you will be able to view a log file and browse to your migrated site. This has been an example of migrating sites from SharePoint 2007 to SharePoint 2010 but as stated earlier it is just as easy to migrate your documents to your new site and also amend or add metadata during the process.

MetaVis also allows you to classify your content as you move or copy it into SharePoint. This is a massive advantage allowing you to change content types and tags as you migrate content to SharePoint 2010. This helps you to organize your content. You can also bulk change after the migration which you cannot do with a vanilla SharePoint install.

Classify Content As You Migrate

As you migrate content to SharePoint 2010, it is important to remember why you are implementing SharePoint in the first place – to improve collaboration and share and manage documents. If that is the case, organizations need to remember that organizing content during migration is just as important as the migration.

2010 offers the opportunity to include and add valuable metadata to your content as you move. Not all migration strategies or third party tools preserve content integrity such as authorship, version, etc. In many cases it requires going back and manually entering the metadata tags which can be a time consuming process.

MetaVis Migrator's powerful features not only make it easy to migrate but it includes the MetaVis Classifier technology and allows users to maintain, change or add metadata tags as you migrate. Below is an illustration of Classifier as you start to migrate content with MetaVis (See [Figure 7](#)).

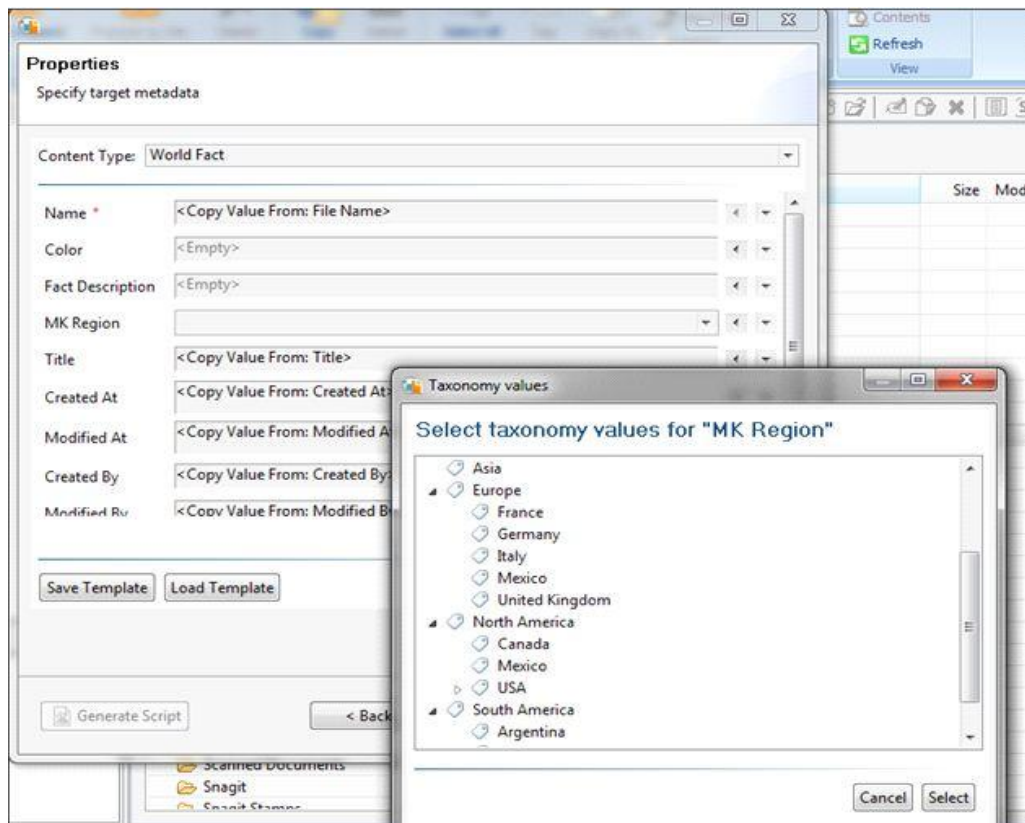


Figure 7

You can use predefined metadata from your SharePoint farm as well use the NTFS folder structure as tags if you are moving content from file shares.

MetaVis Information Architecture Platform

MetaVis Migrator is part of the MetaVis Information Architecture Platform and makes it easy for users to add the capabilities they need such file share, Exchange Public Folder or Outlook migration as needed. This eliminates the need to multiple products.

Migrator users can easily add the MetaVis Suite to provide a complete set of tools for designing, deploying, migrating and managing SharePoint 2010, 2007, 2003, BPOS and Office 365 SharePoint. The Suite includes metadata and migration software to help design taxonomy structures, and move and classify content in SharePoint for improved site documentation, search and navigation.

By leveraging the MetaVis Information Architecture Platform, the Suite provides one integrated user interface for designing and managing SharePoint. MetaVis supports specific SharePoint 2010 features such as Term Stores and Document Sets making it easier for users to take full advantage of SharePoint 2010 functionality and plan or execute a 2010 migration strategy.

The MetaVis Suite for SharePoint includes:

- *MetaVis Architect* – a visual designer for SharePoint taxonomies to create, deploy, compare, copy and reuse SharePoint site structures;
- *MetaVis Classifier* – software to organize SharePoint content and its metadata through bulk metadata tagging and placement; and

- *MetaVis Migrator* – an easy to use migration tool for SharePoint to SharePoint and File Share, Exchange or Outlook to SharePoint migrations.

MetaVis also understands that keeping SharePoint content organized can be a challenging process. Content and SharePoint settings change frequently and are unavoidable. Auditing, tracking and controlling these changes are essential in minimizing errors and ensuring SharePoint site consistency and governance.

MetaVis offers MetaVis Change Manager that provides organizations with a controllable and repeatable way to automate changes made between two or more SharePoint environments. This gives organizations more control over how they administer changes to their SharePoint environment. More importantly, Change Manager easily integrates with the Suite for an integrated user interface.

All of MetaVis products support SharePoint 2010 and can be used over and over again helping you to maintain and organize/reorganize SharePoint content as your business requirements evolve.

About the Author:

Dave Coleman is a Microsoft SharePoint MVP and has spent 20 years working in the IT industry with the last 10 years focusing on SharePoint. He is a prolific blogger, writer and speaker on SharePoint; you can follow him on Twitter @davecoleman146.

About MetaVis Technologies:

MetaVis (www.metavistech.com) provides software solutions to help organize SharePoint environments for improved search, findability and e-discovery. MetaVis takes the complexity out of designing, deploying and managing content within SharePoint by offering reusable taxonomies, metadata management and migration software and services. The benefit is an organized SharePoint environment that is easily understood and well documented. Download a free trial of MetaVis products at www.metavistech.com/downloads.