migrate only the last major version of documents. Site content for which the or- dering process is complete is stored in a separate database. This is particularly important for content that has been modified in the last two years, because it can result in terms of site, web, lists, and items migrated.

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, including: Windows Server 2008 R2; 64-bit version of Windows Server 2008 R2; and Exchange Server 2010.

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The Essential Guide to Migrating SharePoint Content

By Colin Spence

Migrating SharePoint to a new version can be a daunting task. However, with the right tools and approach, it can be a smooth and manageable process. This guide will help you navigate the complexities of migrating SharePoint content from one version to another.

Assessing Reasons to Migrate

Before proceeding with a migration, there are several key considerations to take into account. These include:

- **Current Environment**: Evaluate the current SharePoint environment to understand its capabilities and limitations. This will help you determine if a migration is necessary.
- **Future Requirements**: Assess the future needs of your organization. Understanding future requirements is crucial to ensure a successful migration.
- **Costs**: Consider the costs associated with a migration, including the cost of new hardware, software, and labor.
- **Compatibility Issues**: Check if the new version of SharePoint is compatible with your existing systems and applications.

Preparing for the Migration

Once you have assessed the reasons for migrating, it's important to prepare adequately. This includes:

- **Planning**: Develop a detailed migration plan that outlines the steps involved in the migration process.
- **Data Backup**: Backup all critical data to ensure that you can recover it in case of any issues during the migration.
- **Testing**: Conduct thorough testing to identify and fix any issues before the actual migration.
- **Training**: Provide training to your team on the new version of SharePoint.

Executing the Migration

During the migration process, it's essential to:

- **Monitor the Migration**: Keep a close eye on the migration process to ensure everything is running smoothly.
- **Resolve Issues**: Address any issues that arise during the migration process.
- **User Training**: Provide ongoing training to users to help them adapt to the new system.
- **Evaluating Post-Migration**: Evaluate the post-migration environment to ensure it meets the needs of your organization.

Conclusion

Migrating SharePoint to a new version can be challenging, but with careful planning and preparation, it can be a successful endeavor. By following the steps outlined in this guide, you can ensure a smooth transition to the new version of SharePoint.
collections or databases, but then I will know it works and hopefully overcome any issues encountered along the way. A host environment for SharePoint 2010 is a key requirement when organizations are migrating to the production environment.

In-Place Upgrades

It’s a fairly rare situation where an In-Place Upgrade is the best approach. That being said, it might be the optimal step to take for certain SharePoint 2010 implementations, where the server hardware does not meet the upgrade requirements of SharePoint 2010 and is new enough to be migrated using an offering known as a ‘hybrid’ upgrade. This hybrid method will meet the collaboration and document management needs of the organization without a full rebuild.

To consider an In-Place Upgrade, the basic requirements for SharePoint 2007 must be met by the existing hardware.

- SQL 2008 R2 x64
- Windows Server 2008 R2 x64
- SharePoint 2007 SP2 64-bit for the database
- Service Pack 2 for WSS 3.0 and MOSS 2007

For many cases, this upgrade method is not used because it does not meet these requirements, so the option for the pure In-Place Upgrade is not available. Note that SharePoint 2010 has higher recommenda-
tions for both the RAM and Processor requirements. These new requirements can provide challenges, as Figure 1 shows. In many cases, customers who have a SharePoint 2007 farm that is not configured to meet the requirements for the new SharePoint 2010 farm are left with no other option but to upgrade. 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 low. One benefit of this upgrade option is that it allows the administrator to keep the existing look and feel of SharePoint 2007 while still upgrading the farm. In some cases, it makes sense to not immediately upgrade SharePoint 2007 to SharePoint 2010 and take this time to train users or migrate them to new features. This will ensure that nothing breaks in the process. Note also that you can schedule jobs to run at pre-defined intervals (such as weekly) on a Full or Incremental basis. Many users won’t be impacted because SharePoint object model changes are typically not needed. Note also that you can schedule jobs to run at predefined points in time, such as weekly or at the end of the month. This is a powerful feature that allows you to take advantage of scheduled data migrations.

DoveShare Point Migrator

Microsoft also offers the option of hybrid upgrades, both the Hybrid Update and the Detach Database Approach (see the Microsoft SharePoint 2010 Upgrade Migration: Common Settings section for more details). These two approaches are different, but both are used to upgrade SharePoint 2007 to SharePoint 2010. In the Read-only Database approach, the new SharePoint 2010 farm is on a different server, then the SharePoint 2007 environment is set to read-only, and the content databases are backed up from the old farm and then migrated to the new farm. The databases are then attached in SQL 2008 R2 Management Studio and the upgrade process continues, upgrading the content databases in this manner. Not every installation of SharePoint 2007 includes the ability to upgrade SharePoint 2010 and then go to read-only mode.

In the Case of database upgrade methodologies, such as the Detach Database Approach, use the SharePoint 2007 farm to detach the content databases for the SharePoint 2007 farm, which will allow you to perform the upgrade on the SharePoint 2007 farm, which will allow you to perform the upgrade on the SharePoint 2010 farm. Note also that you can schedule jobs to run at predefined intervals (such as weekly) on a Full or Incremental basis. Many users won’t be impacted because SharePoint object model changes are typically not needed. Note also that you can schedule jobs to run at predefined points in time, such as weekly or at the end of the month. This is a powerful feature that allows you to take advantage of scheduled data migrations.

Support for Multiple Data Sources

A common requirement in many companies is the need to migrate content from sources that are not supported by the out-of-the-box migration tools in SharePoint Server 2010. As an example, customers might be running SharePoint 2010 on their own servers and want to use a third-party tool to move the content to the new farm. This can be accomplished using a third-party tool that can handle this type of migration. A common scenario is the migration of Lotus Notes databases to SharePoint 2010. In this case, the Lotus Notes databases need to be exported to a format that can be imported into SharePoint 2010, and then the content needs to be imported into SharePoint 2010. In this scenario, the third-party tool is used to extract the data from Lotus Notes and then import it into SharePoint 2010. The administrator then creates a new site collection in SharePoint 2010 and then adds the content from the third-party tool to that site collection.

The content migration modules are available for evaluation purposes. However, many companies find value in being able to migrate a portion of content to SharePoint 2010, and then moving the rest through testing for a week or so, after which the Incremental Upgrade tool is used to move the remaining content.

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In-Place Upgrades

It’s a fairly rare situation where an In-Place Upgrade is the best option. That being said, it might be logical where the existing hardware doesn’t meet those requirements, so that there will be a migration to SharePoint 2010. Note that SharePoint 2010 has higher recommendations, which many purists prefer. And knowing what SharePoint 2010 has to offer, you might want to consider the SharePoint 2010 farm from scratch to meet the new requirements.

Note that in the Microsoft “official” steps (http://technet.microsoft.com/en-us/library/cc262483.aspx), the Database Attachment Method involves configuring the new SharePoint farm in read-only mode, both on the SQL Server Management Studio, and then taking the farm offline (not in read-only mode). And then doing what is equivalent to the previous step, only the Microsoft hybrid upgrade method can be used when compared to the pure Database Attach Method.

Visual Upgrade Option

A third hybrid upgrade option is the Product Conversion Process. It is a fairly rare situation where an In-Place Upgrade is the best approach. Besides, upgrades or migrations don’t complete successfully and the primary capabilities of these tools.

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 Server. As an example, SharePoint 2007 farm (Farm1) and a SharePoint Server 2007 (MOSS 2007) farm (Farm2) that wants to consolidate content to a SharePoint 2010 farm. Note that the appropriate combination of DocAve clients must be installed and the agents must be installed on the server, and one destination farm server. To offset this URLs, references the costs of outside consulting or increasing by as much as 40%.

Map to a new domain name. Reorganizations or acquisitions might require a change in domain name and other settings to support scheduling of a new column to a new object. The following section walks through the primary capabilities of these tools.

DocAve SharePoint Migrator

This tool allows users to map source users to new destination names. User Information is used for all activities, so downtime is typically not needed. Note also that you can schedule jobs to run at a predefined time for example, a week later. The Incremental upgrade method is used for all activities, so downtime is typically not needed. Links are provided to the Filter-and-Mapping tools, as well as a prerequisite step to the entire process.

Permits, Name, and Character

Figure 2: Products Supported by Microsoft for In-Place Upgrades

Shrinkage 2007 farm is left operational and is simply consolidated.

Figure 3: SharePoint 2010 Processor Requirements and SQL Server RAM Recommendations

To keep the existing look and feel of SharePoint 2007 farm still intact, a hybrid upgrade method is recommended. In the case of SharePoint 2001 or SharePoint 2003, users might not have been trained on the new features and interfaces, or might have to upgrade select sites to ensure that broken links are fixed. Note that you can schedule jobs to run at a predefined time for example, a week later. The Incremental upgrade method is used for all activities, so downtime is typically not needed. Links are provided to the Filter-and-Mapping tools, as well as a prerequisite step to the entire process.

Preserve the look and feel of existing SharePoint sites, and allow end users to update their site user experience. This lets you use the Visual Upgrade settings from the previous version.

Restore all permissions, only permission lists, only folder permissions, only item permissions, or no permissions are restored. These different options let you determine which combination of settings to restore.

Alert migration of the list, folder, item, and document.

Set maximum length of the SharePoint URL, folder and file name. Out of control URLs can cause problems, and it’s a good idea to set a maximum length of the SharePoint URL, folder and file name. Out of control URLs can cause problems, and it’s a good idea to set a maximum length.
collections or databases, but then I will need to work and hopefully overcome any issues encountered along the way. A bad environment won’t be an issue as long as the databases are accessible to the administrator.

When organizations are migrating to the production SharePoint 2010 farm,
The Essential Guide to Migrating SharePoint Content

By Colin Spence

Introduction

This guide provides a high-level overview of the challenges and best practices for migrating SharePoint content to SharePoint 2010. It focuses on the process of migrating content from SharePoint 2010 to SharePoint 2010, and includes guidance on how to assess the need for migration, plan the migration, and execute the migration.

Assessing Reasons to Migrate

Before embarking on a migration project, it’s important to understand the reasons for migrating SharePoint content. Some of the key reasons include:

- Updated features and functionality in SharePoint 2010
- Better integration with other Microsoft products
- Improved security and compliance features
- Enhanced search capabilities

Assessing these reasons can help determine whether a migration project is necessary.

Planning the Migration

Once the reasons for migrating are identified, the next step is to plan the migration. This includes:

- Assessing the current SharePoint environment
- Identifying the data to be migrated
- Selecting the appropriate migration tools
- Developing a migration plan

Detailed planning is crucial to ensure a successful migration.

Executing the Migration

The migration process involves several key steps, including:

1. Preparing the target environment
2. Migrating data and content
3. Testing the new environment
4. Post-migration cleanup and optimization

Each step requires careful planning and execution to ensure a smooth transition.

Reviewing the Migration

After the migration is complete, it’s important to review the results to ensure that the goals were achieved. This includes:

- Comparing the post-migration environment to the pre-migration environment
- Identifying any issues that need to be addressed
- Documenting the migration process for future reference

Reviewing the migration can help identify areas for improvement in future projects.

Best Practices

Throughout the migration process, several best practices can be followed to ensure a successful outcome. These include:

- Regularly testing the migration process
- Documenting every step of the migration
- Identifying and addressing any issues promptly

Following these best practices can help ensure a smooth migration.

Conclusion

Migrating SharePoint content is a complex process that requires careful planning and execution. By following the guidance in this guide, organizations can ensure a successful migration to SharePoint 2010.